

Preceded by: 7-Formal Author Contact with Schedule and Plan (PM5)

### 8-Release to Production (RTP) Form Routing (PM6)

Followed by: 9-Copyedit and Manuscript Tagging (PM7)

**Why:** To estimate costs and review costs against budget; to assign print quantity; to assign final selling price for parent and supplements.

**Who:** Project Manager; Operations Specialist, Associate Managing Editor, Senior Managing Editor

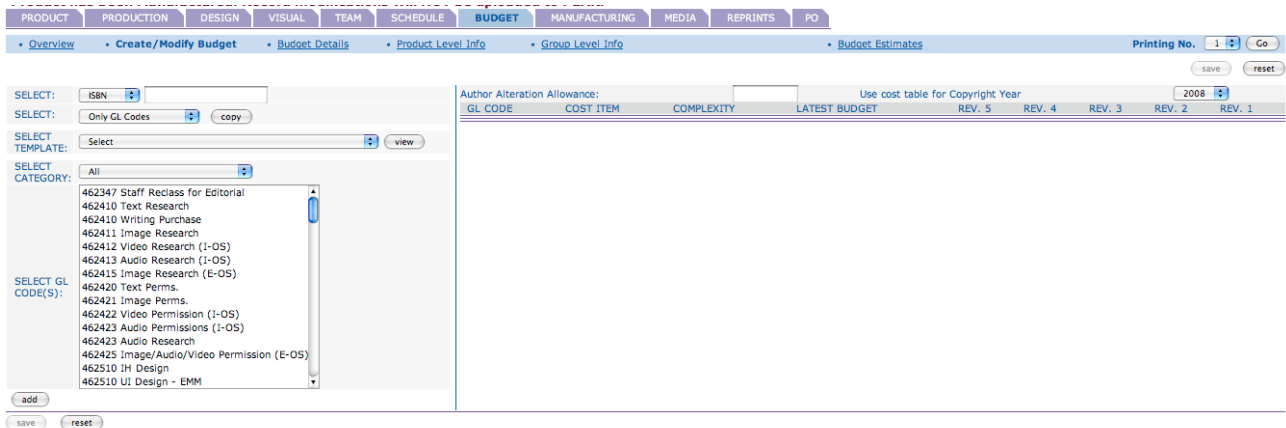
**Skills Needed:** Time management, budget, and communication skills

**Knowledge Base Needed:** PIMS

*A Release to Production (RTP) Form must accompany each manuscript (parent or supplement) coming into production. An approved Blue Form with PPS Budget must be attached; for media supplements, Blue Form and PPS budget is required for the first media product to release and for all premium media products with a PPS budget of \$35,000 or higher. Manuscripts must not be accepted into production without these forms. Costs for all products must be entered into PIMS; RTP is routed at least once for all titles, with the exception of print and media supplements with a budget <\$5,000 (in this case, RTP is not routed.)*

Quantities for print and media supplements, saleable print supplements that will be printed at OPM or through STP (as long as noted on the RTP) will be pre-assigned by the inventory manager prior to release to production. PM/L checks that the quantity has been released in PIMS on the Manufacturing>Overview Tab>Mfg. PO. Qty.

*Costs must be input into PIMS no later than 2 weeks before the manuscript to compositor date in the schedule. (PIMS BUDGET >Create/Modify Budget and BUDGET>Details for budget maintenance.)*





**TASK: Input All Estimated Costs in PIMS**

During budget review, the **Operations Specialist (OS)** will have created the initial BP1 budget in PIMS in an itemized format by cost code (using the “PHHE Plant Budget1” template in the Create/Modify Budget tab in PIMS and targeting the 11 “buckets” of data).

*NOTE:* \*The 11 buckets are groups of similar GL codes that are rolled into one bucket. The 11 buckets are:

Art	Permissions
Comp	Prep,
Design	Production
Development	Proofs
Management	Research
Misc.	

If the product, (such as a print or media supplement) do not warrant all 11 buckets, only those needed should be created.

After gathering cost estimates, the In-House Project Manager (PM)/Liaison creates a second version of the budget (Rev2), called the “Launch (RTP) Estimate” budget. Each department will be responsible for inputting their own costs directly into the “Launch (RTP) Estimate” budget in PIMS.

**Step 1:** After the production launch, the In-House PM/Liaison begins gathering their estimated plant costs associated with the title. The PM/L should have identified at launch any items that will be charged against author royalties (such as index or permission fees), so that these can be excluded from the plant costs.

**Step 2:** Estimate EMM time. The In-House PM/Liaison should estimate their total EMM time for the title. The MPM and the **Art Director (AD)** will also estimate their own EMM time and will input into PIMS budget when they input their own cost estimates. EMM time for departments should be recorded in the budget in PIMS under the following codes:

- In-house PM/Liaison – 462542**
- Art Director – 462730**
- Media Project Manager (MPM) – 462733**

These codes are being used to capture the total estimated costs for EMM for budgeting purposes only. The In-House PM/Liaison, **AD**, and **MPM** will continue to record their daily EMM time at a more detailed level in the Time Management System (TMS) using the detailed codes in that system.

**Step 3:** The full-service vendor estimate is needed to identify the project management/production/composition costs. The vendor estimate will be sent to both the In-house PM/Liaison and **OS** 2 weeks after the design is complete. This estimate will show a cost breakdown by item and will include the castoff page count.

# PHHE Production Procedures: 8-RTP Form Routing (PM6)

**Step 4:** The in-house PM/Liaison initiates the Launch (RTP) Estimate version of the budget:

1. BUDGET >Budget Details holds the existing BP1 budget detail (called Rev.1).

**NOTE:** If there is no BP1 budget detail, ask the **OS** to put the BP1 budget detail in PIMS before proceeding to Step 2.

PRODUCT		PRODUCTION		DESIGN		VISUAL		TEAM		SCHEDULE		BUDGET		MANUFACTURING		MEDIA		REPRINTS		PO																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																							
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2. Click on the "New Revision" button. This will create a new version of the budget in the Rev.2 column on the budget Detail screen. This process copies over the data from the BP1 detail budget.

3. Fill in the following metadata (if not already filled in):

Use cost table for Copyright Year: (title CR year)  
Author Alteration Allowance: (per contract)  
Prepared by: (Insert PM/Liaison initials)  
Last Modified Date: (Date PM/Liaison creates the budget)  
Revision Type: (Launch (RTP) Estimate)  
Page Count: (Castoff page count from vendor estimate)

4. Clear all budget fields in the Launch (RTP) Estimate budget so that all departments can enter their own costs.

**Step 5:** The In-House PM/Liaison inserts the production cost estimates he/she has gathered into the Launch (RTP) Estimate budget. Use the comments field to indicate any costs going against author royalties, such as index, permission fees, and so on.

At minimum, the In-House PM/Liaison should input costs for all items being charged to plant (items being charged against author royalties should not be included, and should be noted in the comments field). In-House PM/Liaison also alerts **OPs** if length of manuscript received is NOT what was targeted in list review meetings.

- Development
- Outright Grants to Authors
- Keyboarding
- Text Research
- Text Permissions
- Image Research
- Image Permissions
- Proofreading
- Copyediting
- Indexing (Note that unindexable front matter and back matter page counts should be included in estimating indexing cost.)
- Line Art\*
- Line Art Alterations\*
- PM EMM Time
- Project Management Outside – Vendor
- Composition
- Alterations
- Scans/Proofs
- Page Proofs

NOTE: The In-House PM/Liaison issues the Purchase Order for any tasks they hire directly, such as copyediting for a project being produced in-house. The **OS** issues purchase orders for FSV work.

\*If an **AV Project Manager (AVPM)** is managing the art program, he/she should input the line art costs.

**Step 7:** Email the **SME**, **AVPM**, **AD**, and **MPM** to let them know that the budget is ready for them to input their costs. The **SME** will review the budget detail at this time. Include the ISBN, author last name, title and edition in your email.

*NOTE:* **AD** adds design budget and adds initials in “Prepared by” field. **AD** updates “Last Modified Date” to Design approval date and emails **OPS**, (and copies In-House PM/Liaison and **SME**) that design budget is approved.

**Step 8:** The In-House PM/Liaison should review the estimated costs vs. budget to determine if there is potential for budget overage. This can be done easily by comparing the Rev.1 and Rev.2 budget detail.

*NOTE:* Review the ancillary costs to ensure that supplements are accounted for in the overall budget. Review permissions fees for reusing images in supplements.

In the event that the cost estimates are exceeding budget, the **SME** and the **OS** should be notified so that action can be taken to fund the overage.

**TASK: Route the RTP Form to Operations Specialist**

The RTP routes for all parent titles and for supplements with a plant budget over \$5,000.

**Step 1:** Route the RTP with the RTP Routing Form to the OS no later than 2 weeks before manuscript to compositor date in the schedule.



**Step 2:** The In-House PM/Liaison enters RTP Form routing date “actual” in PIMS in real-time.

**Step 3:** Keep a copy of the forms in the production file.

**TASK: Review Costs/Select Quantity and Selling Price.**

Within 2 weeks of receiving the RTP Form, the **OS** creates the initial budget and enters all additional costs to the Rev.2 budget in PIMS and enters all plant costs in CES along with the edition costs.

For media supplements managed by Media Production, the **MPM** will enter the RTP Launch Estimate for prepress/composition and CMMB (Central Media Manufacturing Buyer) will then enter manufacturing estimates. The **OS** routes the budget/RTP Form to the in-house PM/Liaison with the CES Cost Estimate Report attached.

**Step 1:** The RTP budget routes for quantity approval and then for final selling price. Routing/approval should take place within two weeks for each stage. Quantities for print and media supplements, saleable print supplements that will be printed at OPM or through STP (as long as noted on the RTP) will be pre-assigned by the inventory manager prior to release to production.

**Step 2:** The In-House PM/Liaison should review the budget when it is routed to ensure that all costs have been captured. Keep a copy of the RTP approvals in the production file.

If any costs have been missed, or additional costs are incurred during production, the In-House PM/Liaison should notify the **OS**.

*NOTE:* The **OS** is the final destination at each stage of routing. The **OS** holds the RTP form until it is time for the Print and Bind (P&B) request. **MPM** for online product will hold all finalized RTPs; CMMB will hold for all physical RTPs.