

# Publication life cycle

## Disclaimers/Explanations

- **Tasks** are not necessarily in order nor sequential. Multiple tasks may be on parallel and simultaneous tracks.
- **Exceptions** are not covered in these processes, which describe only what *should* happen. Talk to appropriate people.
- **Center Tasks** described are from Family Development process as a guide. Each Center will have to customize.
- **Center customizations** must still include tasks needed by others (Store, Web, Accounting, Warehouse, etc.)
- **Actual production** steps of new or revised item are not included. Those will be determined by Centers.
- **Who** column names primary decision maker. Authors and educators may/should be involved more often than mentioned, but may not have the final say.
- **Communications** refers to Center Communications staff (not Extension Communications/Public Relations).
- **Center and Communication decision makers** may be the same or different people, depending on the Center or on the tasks.
- **Communications** is specifically listed when communication background is needed (e.g. print estimates, working with vendors, knowing production processes).
- **Web** listed under **Who** refers to Central Extension Web team, and Center web staff who are following central web processes.
- **This process will be posted** in [Production Guidelines for Freelancers and Staff](http://www.extension.umn.edu/guidelines) ([www.extension.umn.edu/guidelines](http://www.extension.umn.edu/guidelines)).
- **Contact Karen Lilley** ([KLL@umn.edu](mailto:KLL@umn.edu)) to modify or update these procedures. This is a living document.
- **Contact info is at the end of this document** for key Center, Store, and Web staff.

**Please inform and monitor staff and students.** Do not allow them to do tasks in isolation (e.g. removing a web version of a Store item without the Store withdrawal process).

## NEW

Task	Who	Comments
<b>Decide if new item can be produced.</b> <ul style="list-style-type: none"> <li>• Receive administrative approval.</li> <li>• Assure peer review or other scholarship requirements</li> <li>• Determine team (staff or vendors to edit, proof, design, translate...)</li> <li>• Determine if should be print, web, or both</li> </ul>	Center	Each Center will have its own processes to address scholarship, quality, (e.g. audience needs, peer reviews, evaluation, objectives)
<b>Make income decisions.</b> <ul style="list-style-type: none"> <li>• Determine audience needs: single copy, in a package, on a CD, packaged with other items, etc.?</li> <li>• Estimate pricing of above options.</li> <li>• Define income distribution (to Center, author, team, distribution).</li> <li>• Identify how to fund production.</li> <li>• Determine if item should be product or web-only (See WEB-ONLY)</li> </ul>	Center	<ul style="list-style-type: none"> <li>• If item is free to customer, Center or Team needs to pre-pay Store to cover storage and delivery costs.</li> <li>• If packaging multiple items together, talk to Erik in the Store first.</li> </ul>
<b>Estimate quantity to produce.</b> <ul style="list-style-type: none"> <li>• Include number that educators need.</li> <li>• Include copies for staff, freelancers and archives.</li> <li>• Include marketing and training copies.</li> <li>• Limit first year printing to estimate of 1 year sales. (Warehouse is only for items to be sold; not long term storage.)</li> </ul>	Center, educators, Communications	<ul style="list-style-type: none"> <li>• Staff copies need to be taken off the top before it goes to Store. Once stock is received in the Store (inventory), it has a price, and will have to be purchased.</li> <li>• Talk to Store about large quantity storage costs.</li> </ul>
<b>Develop specs</b> <ul style="list-style-type: none"> <li>• To produce item (editing, paper, ink, etc.)</li> <li>• Packaging options</li> <li>• Volume discount options</li> </ul>	Center, Communications	There may be constraints for packaging and volume discount options. Check with Store first if non-standard.
<b>Develop Marketing plan</b> (promotion, web plan, cross marketing, etc.)	Team, Center	
<b>Get item number from Store</b> <ul style="list-style-type: none"> <li>• Make sure it's visible on cover; generally in a corner.</li> </ul>	Center	
<b>Approve final product</b> <ul style="list-style-type: none"> <li>• See PRINT</li> </ul>	Center, authors, Communications	

## DECIDE ON EXISTING ITEMS

Task	Who	Comments
<b>Center needs to make decision on existing items because:</b> <ul style="list-style-type: none"> <li>Notified of low stock by Store.</li> <li>Need to cull high inventory in warehouse (RDU)</li> <li>Content is old or questionable (user or author/owner feedback)</li> <li>Change in priorities (Center)</li> </ul>	Store, audience, Center, author, or owner	Store does not take backorders for items that are out of stock.
<b>Center/Communications ask:</b> <ul style="list-style-type: none"> <li><b>Author (or assign other content specialist) to review content and help make decisions. See REVIEW.</b></li> <li>Is it worth reprinting/revising/keeping? <ul style="list-style-type: none"> <li>What is the demand? See 3-year sales report from Store. Does low stock number need to be adjusted? Does inventory need to be reduced (overstock)?</li> <li>How old is it? When was it last reviewed? Is content current?</li> <li>Is author still around? Does team use it or have ownership?</li> <li>Who were customers? See report from Store.</li> </ul> </li> <li>If low stock, can Center/Team afford to reprint? <ul style="list-style-type: none"> <li>Was this budgeted, or are there funds (grant, etc.)?</li> <li>Estimate editing, design, translation, storage costs, etc.</li> <li>Estimate print run for 1-2 year supply, including off the top.</li> <li>Is this item sustainable? Will customers pay price? Will sales cover costs (including storage)? Do they need to?</li> </ul> </li> </ul>	Center Admin., Communications, author or program team	<b>Standard procedure should be to REVIEW content</b> as part of determining whether to reprint, revise, withdraw (and keep or remove from web). Old content needs to be removed from the Store and web.
<b>Decide (See appropriate sections) and change dates</b> <ul style="list-style-type: none"> <li>REPRINT – Content is current. Change web/Store dates to “Reviewed 20XX.” If other print changes needed (e.g. wordmark(s)) also change copyright and pub date in print to “Reviewed 20XX.”</li> <li>REVISE – Content worth keeping but needs to be updated. When revised, change dates in Store, print, and web to “Revised 20XX” and update copyright date. Change wordmark(s) if needed.</li> <li>WITHDRAW/WEB-ONLY – Content is OK (or REVISED). Remove from Store; keep/put on Extension website. Make sampler complete. Change web date to “REVIEWED 20XX”</li> <li>WITHDRAW/REMOVE FROM WEB - Content is old/unsupported.</li> <li>Adjust low stock number if set too high or low.</li> </ul>	<p>If in budget: Team decides. If not in budget: team leader or admin decides.</p> <p>Center needs to notify Web staff of any of these decisions.</p>	<ul style="list-style-type: none"> <li>Do not change dates to “Reviewed” if content was not reviewed. Be sure it’s reviewed before reprinting or withdrawing.</li> <li>Do not allow Store items to move to other websites. Users will be looking for them on the Extension site.</li> <li>Store does not take backorders for items that are out of stock.</li> </ul>

## REVIEW

Task	Who	Comments
<b>Review is needed.</b> <ul style="list-style-type: none"> <li>Determine who is appropriate to review item content.</li> <li>Give deadline for response.</li> <li>Keep track of where item is (review, respond, or in DECIDE process)</li> </ul>	Center asks authors, team, or program leader. Center tracks.	If item is popular but not supported, Center may ask for non-Extension review and keep in Store or on web.
<b>Review content</b> <ul style="list-style-type: none"> <li>If content is current as is, see REPRINT.</li> <li>If content needs to be revised, see REVISED.</li> <li>Decide if it needs to be withdrawn from Store. See WITHDRAW/WEB-ONLY or WITHDRAW/REMOVE FROM WEB.</li> <li>If content is current and there’s plenty of inventory (not needing to reprint, revise or withdraw) notify Store and Web to update their Reviewed dates.</li> </ul>	Author or team (Reviewer’s name will be added to document)	Revisit DECIDE process after reviews & recommendations are made.
<b>If printed (revised or reprinted)</b> <ul style="list-style-type: none"> <li>Re-evaluate product marketing, packaging, pricing, delivery decisions. Get estimates.</li> <li>Decide whether to put sampler on web, or all on web</li> <li>See PRINT.</li> </ul>	Center, team, Communications	Could make Store packaging decisions, like packs of 25, single copy on web.
<b>If not printed</b> <ul style="list-style-type: none"> <li>Make web-only. See WITHDRAW/WEB-ONLY.</li> <li>Make web-only with revisions. See WITHDRAW/WEB-ONLY.</li> <li>Withdraw from web. See WITHDRAW/REMOVE FROM WEB.</li> </ul>	Store, Web	<ul style="list-style-type: none"> <li>Only withdraw from web if withdrawn from Store.</li> <li>All new/revised educational Store items need at least a sampler.</li> </ul>

## REVISE

Task	Who	Comments
<b>Keep content but revise item</b> , after a REVIEW. in print and on web. <ul style="list-style-type: none"> <li>Assign someone to make revisions.</li> <li>Determine if old content is acceptable to remain in Store and on Web until revisions are made.</li> <li>Determine how much time needed to make revisions.</li> <li>Determine shelf life of stock; consider adding more to buy time (reprint small quantity).</li> <li>If content is unacceptable, WITHDRAW from store and web until revised.</li> </ul>	Team, Center, Web	Store cannot put an item "On Hold" or take back-orders during revisions. It's either available or not. If stock runs out, it will be withdrawn until replaced. Store responds to inquiries by checking comments in database, or referring callers to item's owner.
<b>Find files.</b> Central electronic archives, printer, author, freelancer, etc.	Communications, Web, author	Store may have hardcopy to scan if needed.
<b>Produce new version</b> , following Center process.	Center, author, Communications	
<b>Check/change</b> <ul style="list-style-type: none"> <li>Wordmark, copyright, EEO, ADA, In Partnership wordmarks, etc.</li> <li>Change dates in Store, on printed item, and on web to "Revised 20XX" and update copyright date. Change wordmark(s) if needed.</li> <li>Check references, URLs, Table of Contents, etc.</li> </ul>	Communications, author/reviser	<ul style="list-style-type: none"> <li>See <a href="#">Guidelines</a>.</li> <li>Copyright date changes for revision to content, but not for simple review or reprint. Do not leave web copyright date blank.</li> </ul>
<b>If printed</b> <ul style="list-style-type: none"> <li>Re-evaluate product marketing, packaging, pricing, delivery decisions.</li> <li>See PRINT.</li> </ul>	Center, Communications, author/reviser, team	Could make new Store packaging decisions, like packs of 25, with single copy only on web.
<b>If not printed</b> <ul style="list-style-type: none"> <li>Make web-only with revisions and "Revised by <i>name, date</i>."</li> <li>See WITHDRAW/WEB-ONLY.</li> </ul>	Web	Use File Manger if revision should show up in <b>New on the Web</b> (change "Show As New Until" date).

## REPRINT

Task	Who	Comments
<b>Decide to reprint item as is</b> , after a REVIEW.	Author, team, Center	Store cannot put an item "On Hold" or take back-orders during revisions. It's available or not. If stock runs out, it will be withdrawn until replaced. Store responds to inquiries by checking comments in database, or referring callers to item's owner.
<b>Notify Store of plan to reprint.</b> If out of stock, may need to withdraw until reprinted, or add small amount until reprinted. If low stock, set deadline for reprinting before it goes out of stock.	Communications	Store does not take backorders for items that are out of stock.
<b>Find files.</b> Central archive, printer, author, freelancer, etc.	Communications, Web, Author	
<b>Reprinting typically assumes no changes are made.</b> However, if a non-content change is needed (e.g. new wordmark), then also check and change: <ul style="list-style-type: none"> <li>Wordmark, copyright, EEO, ADA, In Partnership wordmarks, etc.</li> </ul> <b>If content was reviewed</b> before deciding to reprint: <ul style="list-style-type: none"> <li>Change Store database date to "Reviewed 20XX"</li> <li>Update print and web dates to "Reviewed 20XX"</li> <li>Keep copyright date; it does not change for Reviewed or Reprinted.</li> </ul>	Communications	<ul style="list-style-type: none"> <li>See <a href="#">Guidelines</a>.</li> <li>Need to know for sure if something was reviewed before changing dates.</li> </ul>
<b>Re-evaluate</b> product marketing, packaging, pricing, delivery decisions. Get estimates.	Center, Communications	Could make new packaging decisions, like packs of 25 with single copy on web.
See PRINT	Communications	

**PRINT**

<b>Task</b>	<b>Who</b>	<b>Comments</b>
<p><b>Estimate quantity to produce.</b></p> <ul style="list-style-type: none"> <li>• Include number that educators need.</li> <li>• Include copies for staff, freelancers and archives.</li> <li>• Include marketing and training copies.</li> <li>• Limit first year printing to estimate of 1 year quantity.</li> <li>• Determine quantity likely to last for &lt;3 years, based on past sales of this or similar items, and training and marketing plans. (Warehouse is only for items to be sold; not long term storage.)</li> </ul>	Center, educators, Communications	<ul style="list-style-type: none"> <li>• Staff copies need to be taken off the top before it goes to Store. Once stock is received in the Store (inventory), it has a price, and will have to be purchased.</li> <li>• Consider storage costs for large quantities. Talk to Store first.</li> </ul>
<p><b>Determine specs</b> (paper, format, color, packaging, etc.)</p> <ul style="list-style-type: none"> <li>• Get price quotes and approval to proceed.</li> <li>• Decide on vendor.</li> <li>• Determine final retail/wholesale prices.</li> </ul>	Communications, team	
<p><b>Complete PO with accounting staff.</b></p> <ul style="list-style-type: none"> <li>• If costs &gt;\$10,000, need complete price comparison form for 3 vendors</li> <li>• If costs &gt; \$25,000, additional approvals needed.</li> </ul>	Communications	
<p><b>Send files, specs and delivery instructions to vendor.</b></p> <ul style="list-style-type: none"> <li>• Request proofs from vendor before final printing.</li> </ul>	Communications	Vendor must indicate item # and # of copies on each box.
<p><b>Fill out <a href="#">Product Action Form</a> (PAF) and send to Store.</b></p> <ul style="list-style-type: none"> <li>• PAF is needed before item is delivered to warehouse.</li> <li>• Items cannot be sold until PAF is provided and processed.</li> <li>• If PAF comes directly from author, Store notifies Center Communications contact who will finalize it.</li> </ul>	Center or Communications (Heather will write up a PAF info sheet.)	Center checks income codes, consumer codes, abstract/description (on web), packaging and volume pricing.
<p><b>Delivery</b></p> <ul style="list-style-type: none"> <li>• Notify Warehouse when delivery expected.</li> <li>• Make arrangements to deliver /store off-the-top copies to staff.</li> <li>• Warehouse staff notifies Store that product has been received.</li> </ul>	Communications or author	
<p><b>Create or update web version</b></p> <ul style="list-style-type: none"> <li>• Send final electronic files to Web for web version and archives.</li> <li>• Web staff create or revise web version (sampler or complete online).</li> <li>• Update date and copyright on web and Store if reviewed or revised.</li> <li>• Upload in File Manager, and select <a href="#">Consumer Categories</a> so it shows on Topic pages, and under <b>New on Web</b> (if revised, change "Show As New Until" date to 2 months after upload).</li> <li>• Store enters URL for web version to create a link to it from catalog.</li> <li>• Link to item from other web pages (program page, order form etc.)</li> </ul>	Communications or author, Web, Store	<ul style="list-style-type: none"> <li>• See <a href="#">Wiki</a> for instructions.</li> <li>• All educational Store items need a web version: sampler or completely on web.</li> </ul>
<p><b>Key tasks for adding item to Store</b></p> <ul style="list-style-type: none"> <li>• Fax packing slips to Center Accounting staff.</li> <li>• Make product live in Store by entering info into ACCPAC database.</li> <li>• Ask for electronic files if not delivered for web.</li> <li>• Give Web staff copy of PAF to monitor receipt of electronic files.</li> </ul>	Store	If electronic files don't show up within a couple of weeks, web staff may ask for Center help in getting them.
<p><b>Center Accountant</b> goes into EFS and "receives" product.</p>	Center	
<p><b>Follow-up</b></p> <ul style="list-style-type: none"> <li>• File sample copies in unit or Center archives.</li> <li>• Send off-the-top copies to staff and freelancers.</li> <li>• Check that product description shows up in online Store correctly.</li> <li>• Check on sampler, which should be linked from Store.</li> <li>• Request web staff add links to sampler/web version from all appropriate pages (e.g. order forms, program pages, features, etc.)</li> <li>• Notify staff that product is available.</li> <li>• Do marketing, news release, feature, etc.</li> <li>• Pay invoices.</li> <li>• Close project electronic and hard copy folders.</li> </ul>	Communications	

### WITHDRAW/WEB-ONLY

Task	Who	Comments
<b>Withdraw item from Store but keep it on the Extension website.</b> <ul style="list-style-type: none"> <li>Contact Store in writing (email OK) with request to withdraw item.</li> <li>Tell Store what to do with remaining stock (if any): who to ship it to, or recycle (or number to ship and recycle remainder).</li> <li>Provide chartfield account string to charge for warehouse handling, shipping or recycling.</li> </ul>	Center	
<b>Store processes</b> <ul style="list-style-type: none"> <li>Withdraw item in ACCPAC</li> <li>Notify Web staff to make web-only version.</li> <li>Notify warehouse about what to do with remaining stock.</li> <li>Notify requester of withdrawal that it's been processed.</li> </ul>	Store	
<b>If item is revised, send Web staff info on extent of revisions (all new info, only select sections, as marked) along with the revised electronic files.</b>	Communications, author	
<b>Redo web version</b> <ul style="list-style-type: none"> <li>Keep same URL, so not to break links or bookmarks.</li> <li>If item is only a Sampler, find electronic files and create full version.</li> <li>Change item number prefix (product code) to WW.</li> <li>Delete In Partnership wordmarks.</li> <li>Search for "Extension Service" and replace <i>Minnesota Extension Service</i> or <i>University of Extension Service</i> with <b>University of Minnesota Extension</b>. Edit "the" and other surrounding text if needed.</li> <li>If actually REVIEWED, change date and add new names if needed: <ul style="list-style-type: none"> <li>If no content changes, change date to "Reviewed 20XX."</li> <li>If reviewer is not author, add "Reviewed by <i>name</i>."</li> <li>If content has been REVISED, make revisions to web version.</li> <li>Change all dates to "Revised 200XX."</li> <li>If reviser is not author, add reviser's name: "Revised by..."</li> <li>Archive revised electronic files.</li> </ul> </li> <li>Remove <u>To Order</u> link or Buy button (that links to the Store catalog).</li> <li>Search for the item number and/or title to find other pages that may have direct link to Store page and change link to web-only URL.</li> <li>If no electronic files available, scan and post a PDF, with HTML intro and table of contents with links to PDF sections no larger than 100 K., Also link to full PDF above Table of Contents.</li> </ul>	Web staff	<ul style="list-style-type: none"> <li>See <a href="#">Wiki</a> for code and details: <b>Make Sampler Web Only and Replace an Existing Sampler</b></li> <li>Copyright date changes for revision to content, but not for simple review.</li> <li>Always put a date in the web copyright statement.</li> <li>If revised or made complete (from sampler version) post in File Manger so it will show up in <b>New on the Web</b> (change "Show As New Until" date to 2 months from upload date).</li> </ul>

### WITHDRAW/REMOVE FROM WEB

Task	Who	Comments
<b>Withdraw item from the Store AND from the Web</b> because content is out of date, or no longer supported by Center or team. <ul style="list-style-type: none"> <li>Contact Store in writing (email OK) with request to withdraw item.</li> <li>Tell Store what to do with remaining stock (if any): who to ship it to, or recycle (or number to ship and recycle remainder).</li> <li>Provide chartfield account string to charge for warehouse handling, shipping or recycling.</li> </ul>	Center	
<b>Store processes</b> <ul style="list-style-type: none"> <li>Withdraw item in ACCPAC</li> <li>Notify warehouse about what to do with remaining stock.</li> <li>Notify Web staff to remove sampler or web version.</li> <li>Notify requester of withdrawal that it's been processed.</li> </ul>	Store	
<b>Web process</b> <ul style="list-style-type: none"> <li>Remove all files from website</li> <li>Put files in Web Archives, Withdrawn directory, in a folder with item number.</li> <li>Delete item from File Manager.</li> <li>Search the Extension website to find all links to the item and remove them. Edit copy as needed after links deleted.</li> </ul>	Web	See <a href="#">Wiki</a> for details: <b>Withdraw an Item Completely</b>

## UN-WITHDRAW

Task	Who	Comments
<p><b>Withdrawn item is brought back</b> because out-of-stock item has been reprinted or revised, and restocked, or web-only has been reviewed or revised.</p> <ul style="list-style-type: none"> <li>• See processes for: WITHDRAW, REVISE or REPRINT (as appropriate), and PRINT.</li> <li>• Fill out a new <a href="#">Product Action Form</a> (PAF) and send to Store.</li> <li>• Send new electronic files to Web staff if item is significantly changed, with explanation of extent of revisions.</li> </ul>	Center, Communications	
<p><b>Re-enter item into Store.</b></p> <ul style="list-style-type: none"> <li>• See process for: REVISE, or REPRINT, as appropriate, and PRINT.</li> <li>• Update ACCPAC with new info on PAF.</li> </ul>	Center and Store	
<p><b>Create new web version or sampler.</b></p> <ul style="list-style-type: none"> <li>• Use files sent by Center or Author to create sampler or web version.</li> <li>• If item is not significantly changed, find old web version in Withdrawn archives (or old print archives if not previously on web).</li> <li>• Use most current template, even if previous version used old template.</li> <li>• Upload in File manager. Use previous URL.</li> <li>• Notify Store so link can be added to Store catalog page.</li> <li>• Link to item from other web pages (program page, order form etc.)</li> </ul>	Web	If you don't want item to show under <b>New on Web</b> , change "Show As New Until" date in File Manager to yesterday's date.

## WEB-ONLY (Never in Store)

Task	Who	Comments
<p><b>Item has never been in the Store</b>, or it was in the Store but not online as a sampler or complete web version</p> <ul style="list-style-type: none"> <li>• Use web-only template.</li> <li>• Get number from Web-only spreadsheet.</li> <li>• Identify (for Related box) titles and links: <ul style="list-style-type: none"> <li>○ Related Programs – Link to Program Pages</li> <li>○ Related Resources – Link to Topic pages (usually matches Consumer Categories in File Manager)</li> <li>○ Related Materials – Link to other items in series, or about same topic (other web-only, Store item, webpage, or website)</li> </ul> </li> <li>• Upload in File Manager, and select <a href="#">Consumer Categories</a>. Be sure "Show As New Until" date is 2 month from upload date so it shows up under <b>New on Web</b>.</li> <li>• Link to web-only item from other web pages (program page, order form etc.)</li> </ul>	Communications or Web staff	<ul style="list-style-type: none"> <li>• EFANS can keep using Misc. web format until we move into new designs.</li> <li>• We do not post items that are not ours. Link to them.</li> </ul>
<p><b>Remove a web-only item</b></p> <ul style="list-style-type: none"> <li>• Be sure it's really web-only: check for <u>To Order</u> link or Buy button. If there's any question, look for item in Store. If a Store item, see DECIDE ON EXISTING ITEMS.</li> <li>• Check with author or program team to confirm removal if request was made by someone else.</li> <li>• See WITHDRAW/REMOVE FROM WEB, Web process section.</li> </ul>	Communications	

## CONTACTS

<p><b>Centers &amp; Communications</b></p> <ul style="list-style-type: none"> <li>• EFANS: Rebecca Noran or Vicky Bayerl, <a href="mailto:efans@umn.edu">efans@umn.edu</a></li> <li>• CV: Joyce Hoelting, <a href="mailto:jhoeltin@umn.edu">jhoeltin@umn.edu</a></li> <li>• FD: Heather Lee, <a href="mailto:hmllee@umn.edu">hmllee@umn.edu</a></li> <li>• YD: Wendy Huckaby, <a href="mailto:huckaby@umn.edu">huckaby@umn.edu</a></li> </ul>	<p><b>Store</b></p> <ul style="list-style-type: none"> <li>• Erik Bremer, <a href="mailto:breme005@umn.edu">breme005@umn.edu</a></li> <li>• Andrea Nelson, <a href="mailto:nels5652@umn.edu">nels5652@umn.edu</a></li> </ul> <p><b>Web</b></p> <ul style="list-style-type: none"> <li>• Tom Stanoch, <a href="mailto:stan0347@umn.edu">stan0347@umn.edu</a></li> <li>• Karen Lilley, <a href="mailto:KLL@umn.edu">KLL@umn.edu</a></li> </ul>
---	--