

Summary

The FLIP system is flexible enough to reflect a variety of publication practices, yet is simple to configure and use. It centralizes documents and notifications, streamlines workflow, improves efficiency, and aids document tracking.

The system we envision encapsulates the entire editorial workflow, from submission to output. Overall, we think it will be of benefit to authors, editors, and publishers alike.

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Introduction

Current practices for managing editorial workflow seem to be as varied as the publications themselves, and while magazines, books, and journals all move content through approximately the same stages of development, the specific procedures and sequences within each stage take many forms.

The goal of Flip Systems was to draw from various publications' current practices and develop a model for a workflow system that would allow various users to process, manage, and collaborate on content from submission to editing to output, resulting in increased efficiency and turnaround time.

Research

Flip Systems created a standardized questionnaire and interviewed a variety of editors on their workflow processes; each workflow was then diagrammed. Strengths and challenges evident in each diagram were identified and compared, as were common practices, sequences, roles, and relationships. Based on these findings, we integrated the key stages and tasks into a general model.

We expanded this model by creating wireframes for the various interfaces that would be needed throughout the workflow process.

The FLIP Model

We identified four distinct stages in the workflow process: evaluation, negotiation, editing, and output. These stages occur in a linear process, but within each stage the individual tasks are performed in various combinations and sequences.

For instance, all publications we interviewed evaluated submissions, but some had more reviewing steps than others.

We also found that within the editing stage, tasks varied based on the type and number of editing rounds required, the levels of approval, and the author's participation in each process.

In order to accommodate as many different publications as possible, we developed a modular system that could be customized for each stage.

For example, users would be able to define how many editorial tasks are required, as well as what they're named, what order they're in, when they're due, and who needs to complete them.

Administrators can define access levels for various users, from unknown submitters to external peer reviewers to in-house and freelance editors to senior project managers.

Glossary of FLIP Terminology

Bucket: Documents in the system will be found in one of six “buckets” (submission, red, yellow, green, layout, publish), which indicates what stage of the workflow process they are in.

Doc ID: Unique to each document and permanent. Can describe an article, book, chapter in a book, image, etc.

Editing: The third stage in the editorial workflow; all submissions marked in the green bucket appear here. Tasks in the editing stage can be arranged according to the needs of the project or the conventions of the publication.

Evaluation: The first stage; all items submitted for consideration appear here. Once evaluated, submissions then go to the red or yellow bucket.

Green bucket: Submission items accepted for publication and ready for the editorial process will appear here.

Layout bucket: Accepted submissions that have gone through the entire editorial process and are now ready for layout are found here.

Manager: A class of user with full administrative access. Managers can assign tasks to other staff, decide how to order the tasks within each stage, change due dates, etc.

Negotiation: The second stage; all submissions found in the yellow bucket appear here. Changes and comments that must be addressed in order to decide if a submission will be accepted are tracked here.

Notification: Can be sent to update managers on progress and milestones, confirm the receipt of a new submission, etc. Managers can toggle whether the assignment and/or completion of certain tasks triggers a notification when they set up their configuration.

Output: The fourth stage in the editorial workflow process; all submissions marked in the layout bucket appear in this stage.

Project: An entire book or issue — that is, a series of related documents, each of which would have a unique doc ID. A project would have a unique project ID as well.

Publish bucket: Once a project has successfully undergone the editing process and is in its final form, it is moved to the publish bucket, where it can be output to various media.

Reader: A class of user. The reader could be a volunteer, an expert/peer reviewer, contest judge, or anyone else involved in the evaluation process.

Red bucket: Rejected or withdrawn submissions are found here, and no longer appear in the list of available documents in any other stage.

Stage: One of the four major processes in the editorial workflow — evaluation, negotiation, editing, and output. Each stage is made up of tasks.

Submission bucket: Unsorted, unreviewed submissions are automatically assigned to the submission bucket for evaluation. All items start in the submission bucket.

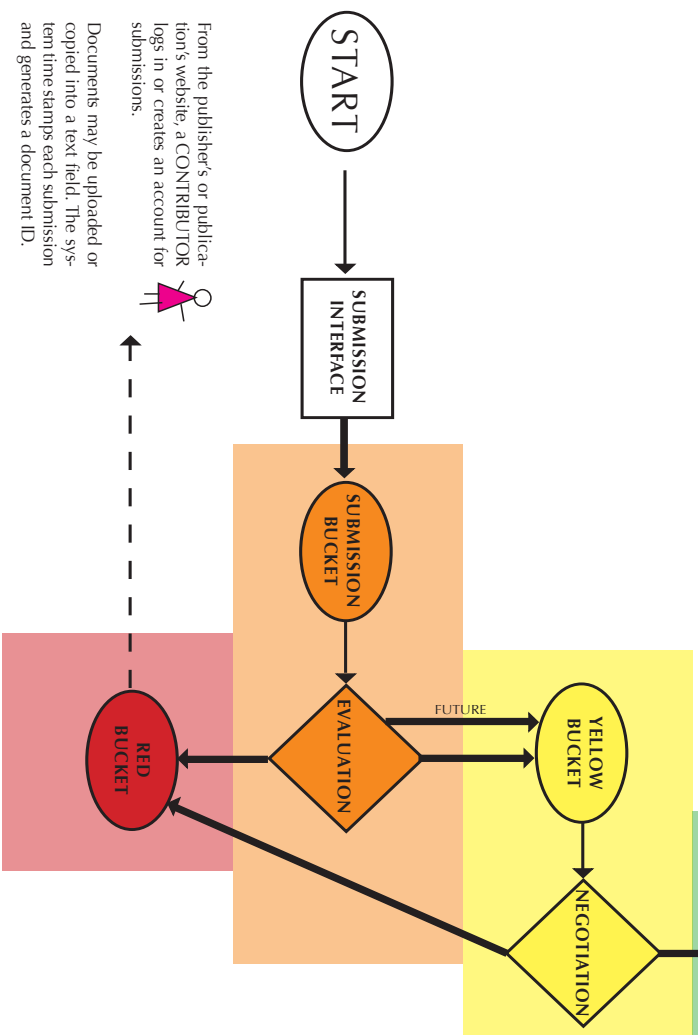
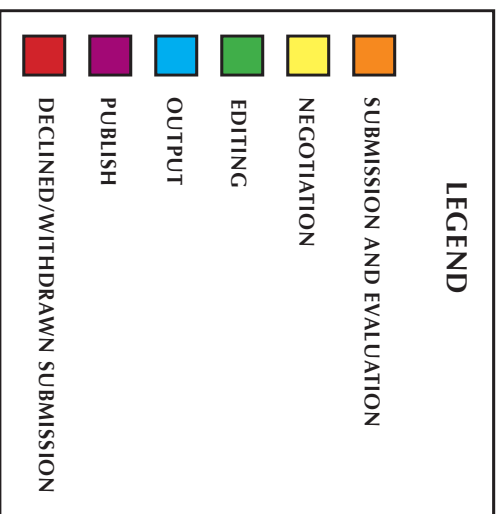
Tasks: Each stage is made up of a number of tasks, which are the individual steps in the workflow process. Users can specify which tasks are included in the stage and in what order they must be completed.

Yellow bucket: Once items have been evaluated, they will move out of the submission bucket into either the red bucket (rejection) or the yellow bucket (accepted pending negotiation).

Modelling Editorial Workflows

flip SYSTEMS

adam
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jenna
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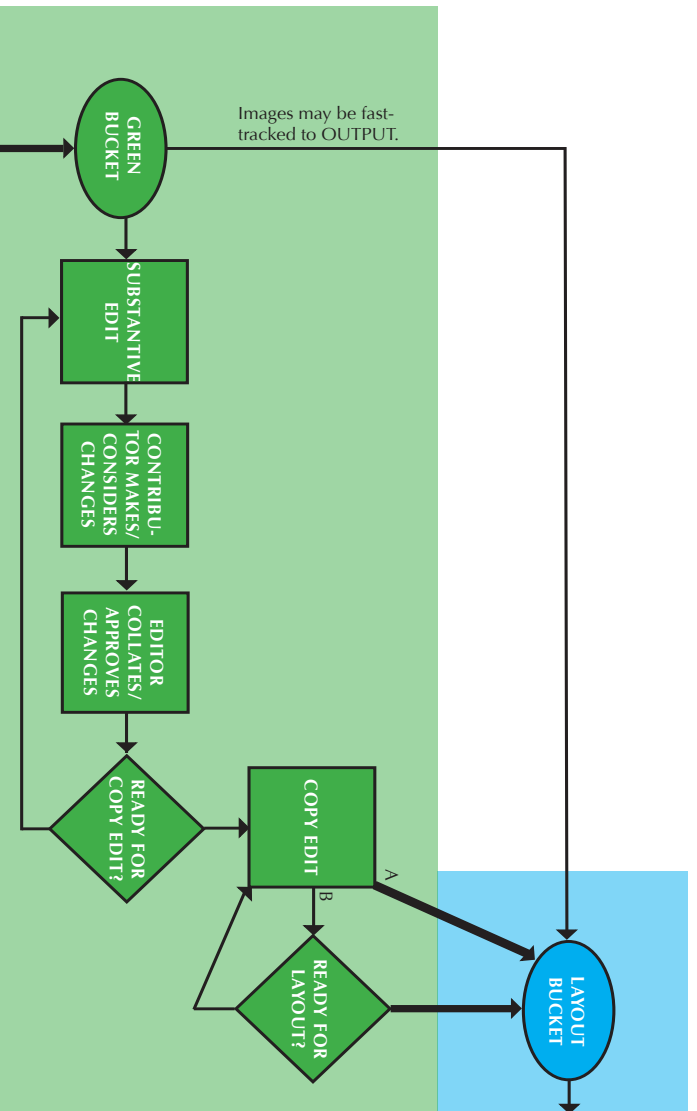


EVALUATION:

During EVALUATION, a **READER** reviews submissions from the submission bucket and evaluates whether a submission should be accepted, declined, or reviewed further.

EVALUATION tasks include score a submission, add comment, collate reviews, separate quick rejections, advance to NEGOTIATION, and send notification to CONTRIBUTOR or other user.

Documents may be uploaded or copied into a text field. The system time stamps each submission and generates a document ID.



NEGOTIATION:

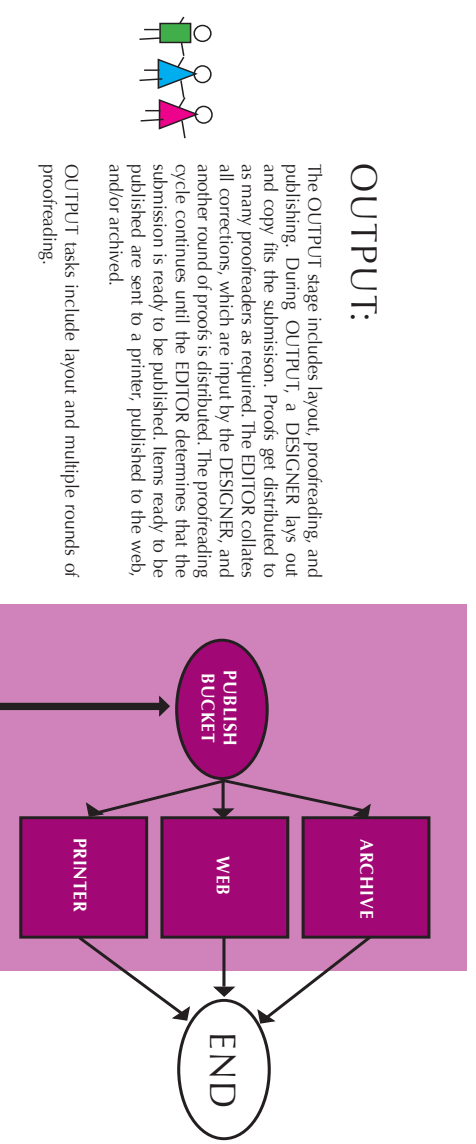
During NEGOTIATION, **READERS**, **EDITORS**, and/or **MANAGERS** consider documents for acceptance.

NEGOTIATION tasks include editorial meetings, internal scoring, and negotiation with the CONTRIBUTOR regarding changes or additional content required for acceptance.

EDITING:

The EDITING stage may follow a variety of sequences with multiple repetitions and approvals. Users may define their editing process by dragging components into the appropriate order and number of iterations through an administration interface.

EDITING tasks include substantive edit, make/approve changes, collate/approve changes, line edit, copy edit. Editing decisions may require notifications.



OUTPUT:

The OUTPUT stage includes layout, proofreading, and publishing. During OUTPUT, a **DESIGNER** lays out and copy fits the submission. Proofs get distributed to as many proofreaders as required. The **EDITOR** collates all corrections, which are input by the **DESIGNER**, and another round of proofs is distributed. The proofreading cycle continues until the **EDITOR** determines that the submission is ready to be published. Items ready to be published are sent to a printer, published to the web, and/or archived.

OUTPUT tasks include layout and multiple rounds of proofreading.

