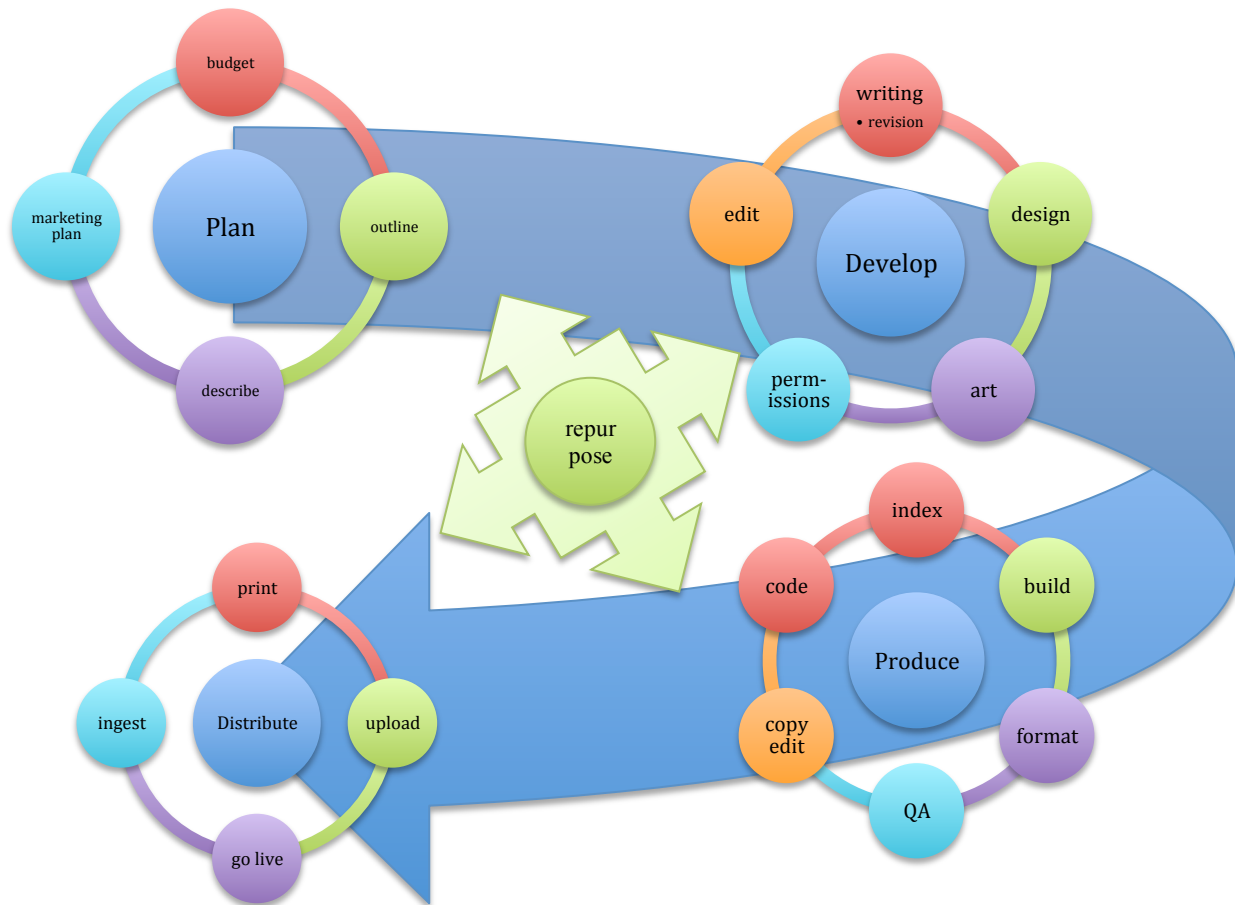


Best Practices for eWorkflow and Quality Control in Digital Products

- Understand what can't vary in the workflow (e.g., proofreading/QC comes after layout).
- Start with the end in mind: prioritize the medium and user.
- Digital first — single source; easier to flow from digital to print than the other direction.



- Set up file management systems (folders and naming protocols for version control, and backups):
 - store/archive originals and versions
 - manage assets (photos, quotes, and other “permissioned” items)
 - manually, by adding date/process/initials to end of file name and adhering to “one person at a time” revision principles
 - automated, via FTP interface that “signs out” files & tracks version numbers (e.g., Sharepoint)
- Educate and orient all team members on processes, tools, workflow, and product (each time):
 - file naming protocols or other version control systems
 - markup expectations (which tools and methods)
 - address/mitigate pitfalls of “synced” files like Dropbox
 - define steps, roles & expectations (development vs copy edit vs permissions, etc.)
 - what happens to files down the line so that team members can implement, maintain, support, and not undo important tags and other aspects
 - end product’s requirements, features, and limitations

Best Practices for eWorkflow and Quality Control in Digital Products

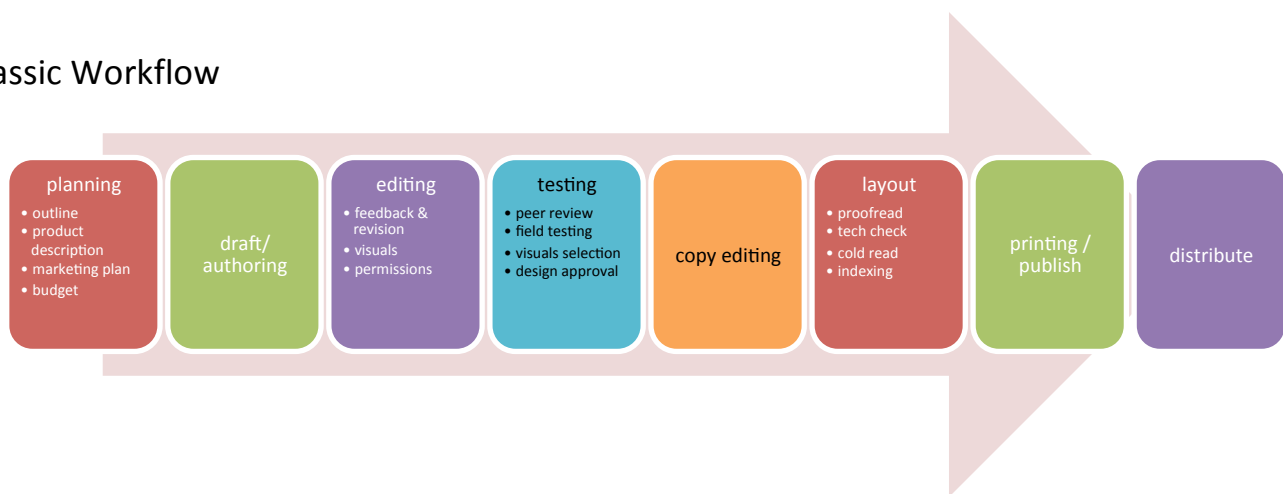
- Open the files — check files as soon as received and before next step (QC: openable, complete, no glaring snafus).
- Set limits to revisions/“tinkering” so as not to compromise editorial process/quality control (or cost).
- Designate a single contact for decisions and expert guidance concerning systems, product, content — or at least only one contact for each of these spheres, and have them collaborate.
- Communicate changes with compositor’s needs in mind:
 - how they will input changes and verify accuracy
 - video recordings and chat may increase understanding
 - visual specialists may communicate better with visuals (e.g., PDF markup of screen grabs)
 - feedback grids/lists of changes may be best when editing database-driven content
 - provide coaching re markup (e.g., proofreader's symbols, how to use Track Changes)
- Rethink the forest vs trees. Be alert to system-wide snafus. If something looks wrong or awkward, ask for clarification and double-check that we're doing editing in the most helpful way.
- QC the final output medium/product (e.g., Kindle, web browser, printed page).

— Don't deviate from systems. Systems protect quality. —

Tool Concerns

- Keep software and computer up-to-date (needn't be cutting edge but should have all updates and patches applied; routine maintenance).
- Keep virus software up-to-date and your computer secure.
- Backup to hard drive and cloud (i.e., redundant systems).
- Use the right software for the job (e.g., XML editors, design software rather than Word).
- Use the mark-up and commenting tools (not in-line comments and jury-rigged methods).
- Have the right platforms in hand for final “proofreading” and QC.

Classic Workflow



More tips and links to software and tutorials at <http://blog.CatchTheSun.net/2015/03/aces2015/>

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