# Espresso Book Machine Print Order Management Tool

### Goals:

* cut down time staff spend on EBM requests
* launch efficient and informed conversations with customers about the process
* simplify the process of tracking customer print jobs

### Summary:

The tool is a web form that delivers EBM print order information to a database. The web form will be “smart,” offering informative error messages when necessary, creating efficient and simple customer experiences. The back-end database will have a user friendly interface that creates timely notifications and is easy for staff to search, edit and maintain.

#### Basic Submission Process from the Customer’s Perspective

First question on the form is what would you like to do?

1. Submit a new print job
2. Modify an existing print job
3. Check the status of your print job
4. Customer selects “Submit a new print job”

1. They are directed to a revised “Are You Ready to Print Checklist” and encouraged to review it before they start the submission process
2. Below the Checklist is a form that asks for:
   * 1. Name\*
     2. How do they prefer to be contacted? Email or phone?\*
     3. Email\*
     4. Phone number\*
     5. matte or shiny cover\*
     6. standard cream or standard white paper\*
     7. number of prints\*
     8. request to waive the proof process[[1]](#footnote-1)
     9. comments

\*mandatory fields

1. Customer uploads book body in one field and the cover in another field – current configuration of the server is that the total size cannot exceed 50MB, ideally we would increase this. Otherwise, customers may have to upload their files one at a time or be directed to contact staff.
2. Form and uploads are submitted and files are automatically evaluated to determine
3. If they are the right file type (PDF/X-1a:2001-2012 or PDF/A export settings)
4. If the book block page dimensions are between 4.5” x 5.0” (11.4 cm x 14 cm) and 8” x 10.5” (20.32 x 26.7 cm)
   * 1. If there are more than 40 pages in the body and no more than two pages for the cover
     2. The total cost (according to page number)
     3. The total cover width (considering total body page numbers and paper type to determine width of spine)
5. There are four possible outcomes of submitting the form
6. If there is a problem with the file type, dimensions or amount of page numbers the user will get an error message detailing the specific problem and how to fix it, including links to how-to advice and contact information. The customer can either make changes and try online submission again or contact makerspace staff and staff can upload their order from the back end (step II. 5. b).
7. If everything is fine at this stage, the page tells the user their print number and tells them to expect a confirmation email. The automatically created confirmation email includes the print number, the printing price for a test copy and the full run and assurance that they will be notified as soon as the test book is printed. It will also include contact information for the makerspace staff, a link to where the customers can view or edit their submission, and a reminder that the library will automatically just print a proof copy unless the customer contacts them to formally waive that part of the process.
8. If, upon review by staff, there are problems with the submission, staff will contact the customer and they will decide how to proceed together. There are two basic options – the customer can make edits on their own and modify their order using the online form (step I. 2) or the customer and staff member can work together and the staff member can modify the order from the backend (step II. 5. b).
9. If the customer has requested to waive the proof process, staff will contact them to review the process and confirm their decision.
10. Customer selects “modify an existing print job.” In this scenario
    1. the customer has already successfully submitted an order and would like to change an aspect of it
    2. if the status of the print job is In Progress, Ready for Pick Up, Completed or Cancelled, the customer will be encouraged to contact the makerspace via email or phone – they will not be able to make any changes
    3. the customer cannot change their name or their print number
    4. the customer can delete their order
    5. the customer can edit any other field, including uploading one or more files to replace earlier files
    6. the form has the same parameters as the from in step I. 1. and provides the same detailed error messages
11. Customer selects “check the status of your print job”. In this scenario
    1. Customer inputs their print number
    2. The tool retrieves and displays the details of their print order submission including a preview of the files they have uploaded
    3. The tool retrieves and displays additional details of their print order – status, cost
    4. Page also displays contact information for the makerspace and a link to the modify order page

#### Basic Submission Process from the Staff’s Perspective

1. Staff are notified of new submissions in two ways:
   1. New submissions appear at the top of the list – they are marked with the colour-coded status “Received” (see Statuses section below)
   2. Makerspace@epl.ca receives an email with all of the print information in it
2. Staff open book block and cover files and determine if they are fit to print or if they need to contact the customer about revising their content.
3. If changes need to be made, staff contact the customer and work with them to make changes. Customers are encouraged to make their own changes online, but staff are able to edit almost every field in the database on behalf of customers as necessary. Staff cannot edit the print number, customer comments section or the request to waive the proof process box.
4. Once the customer has been notified that changes need to be made, staff change the status to “On Hold” indicating that the project is waiting on customer feedback. Staff can use the “Staff Comments” box to provide details.
5. There are two ways for edits to be made
   1. The customer makes edits using the online form and staff are notified as in step II.1 – with the “Received” status and an email
   2. The staff make the edits in collaboration with the customer as necessary. Staff are able to change anything in the order on behalf of customers (except print number, name & customer comments)
6. When the submission is ready to print, staff will either
   1. Print a proof copy. See Step 7
   2. Print a single run or print multiple copies without printing a proof. See Step 9
7. When the proof copy is complete, staff change the status to “Proof Copy Completed” – this sends an automatic email to the customer with relevant information asking them to review the proof. If the proof needs to be edited, the process begins again from Step 3. If the customer approves the proof, there are two possible ways of proceeding
   1. The EBM is busy with another order, so staff change the status to “Proof Approved.” This indicates that the order is ready to print. When the EBM is free, staff start the print run and move to Step 8.
   2. The EBM is not busy, so staff print out the full run and move to Step 8.
8. If the print run is large, the staff member must change the status to “In Progress” this prevents the customer from making any edits and opens a “Total Prints” field that staff can use for recording the total number of prints completed, editable by staff.
9. When the full print is completed, staff change the status to “Ready for Pick Up” – this opens an invoice template and automatically populates relevant fields. Staff confirm or edit the invoice. When they press send, the invoice is saved in the database and a copy is automatically sent to the customer.
10. When the customer arrives at the Makerspace to pick up their print(s), the staff member can use the database to create and print an invoice. They can again choose to edit the invoice before it is printed.
11. Once the customer has paid for and taken home their print job, staff can change the status to “Completed”
12. The database maintains the full print order history, but will delete PDFs after a predetermined number of months
13. The database also maintains the edit history of each individual order
14. If at any point the customer wants to pay a portion of total cost staff can record the amount they’ve paid in an “amount paid” field.
15. When a customer has deleted their order using the online field, the order status changes to “Cancelled.”

### Statuses:

|  |  |  |  |
| --- | --- | --- | --- |
| Status | Who | Meaning | Automated Action |
| Received | Customer | Staff need to take a look at it because   * a new order has been submitted by a customer * a customer has edited their existing order | An email is sent to [makerspace@epl.ca](mailto:makerspace@epl.ca) including all order information |
| On Hold | Staff or Customer | * A customer has been notified that they must edit their content and resubmit * A customer has requested time to edit their content and resubmit (after a print proof for example) * A customer is currently editing their order | None |
| Proof Copy Completed | Staff | A proof copy of the order has been printed and is waiting to be reviewed by the customer | An email is sent to the customer notifying them that it is time to come in an review the proof |
| Proof Approved | Staff | The proof copy has been approved in person by the customer and the submission is ready to print | None |
| In Progress | Staff | The print run is in the progress of being printed | Customer is no longer able to edit their order online |
| Ready for Pick Up | Staff | The full run of prints is completed and ready to be picked up | An email is sent to the customer indicating that the order is completed and payment info |
| Completed | Staff | The customer has paid for and taken home their order | None |
| Cancelled | Customer or Staff | * The customer has cancelled their order * A staff member has cancelled the order on a customer’s behalf | None |

## Invoice fields:

The invoice will need to include:

* an invoice number
* date
* customer name
* Makerspace name and address
* book title
* number of books
* base cost ($4.76)
* page numbers
* unit cost (4.76cents per page)
* the total amount before tax
* tax amount
* total cost
* a box of information for staff use including:
  + iNovah Use Code (4129 Espresso Book Machine)
  + Total number of cover pages
  + Total number of pages
  + Note to “leave tax as is in iNovah”

### Form security:

We can use a honeypot trap to increase form security. There is a honeypot module in Drupal (<https://drupal.org/project/honeypot>) but it is easy to build into any form. Also any other security measures the web services team deems necessary.

1. This field is accompanied by an explanation of the proof process, the consequences of forgoing the proof process, and that if a customer selects this box they will be contacted by staff to confirm [↑](#footnote-ref-1)