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PCS Interface

a  Login name and role display at the top.
b  Search for a program by ISBN, PEAR ID, PO number, or perform an advanced search.
c  Click the **Show More** link to expand your program information view, or click the link again to collapse the view.
d  Program name displays.
e  Program state displays.
f  Click program tabs to access the various screens.
Navigation Bar Menu Options

Dashboard

Click the **Dashboard** menu to access the **My Dashboard** screen.

a. The applications you are registered for display in the **You are registered for these applications** panel. Click links to the applications to access the login screens.

b. To access a program, click a program component in the **My Program Components** panel.

c. Access training resources, support resources, and system and tool alerts.
My Programs

a Click the **My Programs** menu to view and select recently worked on, favorites, or recently completed/published programs. The **My Programs** screen will not appear if you are in PCS for the first time.

b You can search for a program by ISBN, PEAR ID, PO number, or perform an advanced search.
Search

a. To search for a program by ISBN/PEAR ID or PO number only, select the appropriate value from the drop-down menu, type the appropriate ISBN/PEAR ID or PO number in the text box, and then press return.

b. To perform an advanced search, click the Advanced Search link. The search screen appears.

c. There are three types of personal saved searches:

- A **Session** search is a temporary search created each time you execute a search and is available during your login session. Once you have logged out, the search is automatically deleted.

- A **Personal** search is a search that is created by you and is only visible to you.

- A **Divisional/Source/Functional** search is created and marked to be shared within a division.
Click the **SELECT GROUP** drop-down menu to choose the appropriate group (i.e., USHE: Arts & Sciences).

Click the **SELECT** drop-down menu to choose the appropriate category (i.e., Plant, Product, Production, etc.).

Select elements in the **SELECT SEARCH ELEMENTS** panel, and then click the **add** button to add the elements to your search criteria. Conversely, you can click the **remove** button to remove search elements.

Click the **search** button to initiate a search. Click the **save** button to save a search. Click the **reset** button to clear search criteria.
View Product

When working on a program, click the View Product menu to quickly access the Product/Title Info screen.
**Tools**

Click the Tools menu to access the Export, New Program (& Main Program Component), Notes Manufacturing, Dashboard, My Preference, Hot Links, and Sap Vendor Add-Change Form options.

- Select Export to access the Export/Search screen.
- Select New Program (& Main Program Component) to create/initiate a new program and create your first program component.
- Select Notes Manufacturing to add manufacturing notes.
- Select Dashboard to access a reports dashboard.
- Select My Preference to choose your preference of landing on either the Search screen or the My Programs screen upon login.
- Select Hot Links to add and access frequently used HTML links.
- Select Sap Vendor Add-Change Form to add/change vendor information.
Admin

Click the **Admin** menu to access the **Add/Edit Schedule Template**, **Team Maintenance**, **Budget Maintenance**, **PO Template**, **SOA Maintenance**, **Contact Maintenance**, **Financial Parameters Lookup**, **Workflow SOA Maintenance**, **Plant PO SOA Maintenance**, and **PLS Title Transfer** options.

a Select **Add/Edit Schedule Template** to access the **SCHEDULE TEMPLATE MAINTENANCE** screen where you can select a template from the list of available templates (created by super users) and add or edit milestones along with associated durations and dependencies.

b Select **Team Maintenance** to search, add, or edit team members.

c Select **Budget Maintenance** to access the **BUDGET MAINTENANCE** screen where you can specify costs against GL codes, add/edit budget templates, specify rate maintenance, and work with fiscal plant budget.

d Select **PO Template** to access the **CREATE / MODIFY PO TEMPLATE** screen. On this screen, you can create and modify PO templates or export templates as PDF files.

e Select **SOA Maintenance** option to view or edit the schedule of authority. You can also view the total PO limit and export data to Excel.

f Select **Contact Maintenance** to add and edit contact information.

h Select **Workflow SOA Maintenance** to add a new SOA or edit an existing SOA.

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**Note**

Not all features may be available to you if you do not have Admin access.
Select **Plant SOA Maintenance** to add or edit a plant SOA.

Select **PLS Title Transfer** to import an Excel spreadsheet.
Forms

Click the **Forms** menu to access the **PH Higher Ed Status**, **Launch Notes**, and other various forms.

**a** Select **PH Higher Ed Status** to view and edit the program team and also view and edit due dates for manuscript, cover, text, etc.

**b** Select **Launch Notes 1-4** to view and edit launch note pages. Launch notes may contain information such as distribution, title information, specifications, vendor information, budget, key dates, etc. From this screen, you can save launch notes as a PDF file.

**c** Select **Program Component Design Form** to export the program component design form.

**d** Select **Archive Submission Form** to edit and/or export the archive submission form.

**e** Select **Bindery Template Request Form** to edit and/or export the bindery template request.

**f** Select **Central Design Cover Request Form** to edit and/or export the central design cover request form.

**g** Select **Printer Data Form** to edit and/or export the printer data form.
Reports


a. Select the **Higher Ed Production Report** option to access the Higher Ed production status report. There is a print option available on this screen.
b. Select the **Plant Budget Report** option to generate a plant budget report.
c. Select the **ESM Production Report** option to generate a production report.
d. Select the **Financial / P&L Statement** option to generate a profit and loss statement that includes profit and loss estimates, investment, investment indicators, plant cost details, sales information, manufacturing cost details, etc.
e. Select the **Program Proposal Report** option to generate a report for the entire program, program components, or a single program component. Once generated, you can create a PDF of the report, print the report, or route for approval in PDRM.
f. Select the **Release To Production Report** option, and then select a program or program component and generate the release to production report.
g. Select the **Market Feedback Report** option to search for a appropriate market feedback and then export to Excel.
Select the **Rights Clearance Status Report** option to generate and then export or print the report.

Select the **Gross Margin Summary Report** option to generate or export a gross margin summary report.

Select the **Operation Income Report** option to select a product and then generate a report or view product details.

Select the **Gross Margin Report** option to select a product and then generate a report or view product details.
Workflow Applications

Click the **Workflow Applications** menu to access/select workflow applications such as Documentum (DCTM), the Content Planning Tool (CPT), and the Rights Management System (RMS). Application login screens will open in a new browser window.
Navigation Bar Buttons

Help

Click the Help button to access PCS support information and FAQs.

Sign Out

Click the Sign Out button to log out of the PCS application. After signing out, close your browser window to make sure that you are completely logged out of the application.
Program Dashboard

To view program information in the Dashboard view:

a. Click the Program tab, and then select the Dashboard tab. Both program and created program components appear in the Dashboard view.
b. Click the ▶ arrow(s) to expand the view.
c. Click the title link to access the Editorial Title Info screen.
d. Click the Export button to export information in an Excel file.
e. Click the Publish Program Structure button to share program information with CPT.
Tree Structure

You can access the program tree from the Editorial Title Info screen.

a) Click the + or − icon next to each node to collapse or expand.
b) Click the △ arrow to show or hide the tree panel.
c) Right-click various levels of the tree to access menus and perform actions such as create, copy, move, delete, etc.
d) A ✅ icon indicates that a program or component has been selected.

The program tree has five levels:

1. Program
2. Business Group(s) (i.e., USHE, GLOBAL, NASTA, PIE)
3. Main Program Component
4. Set(s) (i.e., SET 1, SET 2, etc.)
5. Supplement/Child Program Component(s)
States

To promote or demote the state of a program component:

a. Click the [Editorial] tab.

b. Select the [State] sub-tab.

c. The current state of the program displays at the top of the screen.

While moving through the planning process, a program will be in one of the following states:

**What If** Any newly created program will be in the **What If** state by default. This is the state when the program is still in conceptualization, and it is not committed for corporate viewing.

**Potential** A program is in the **Potential** state if it is in development and is not financially approved. In this state, the program proposal is being prepared and is yet to be routed for approval.

**Proposed** A program is in the **Proposed** state when the program proposal has been routed for approval.

- Program components which have been routed for approval will display the state **Proposed – Approval Pending**.
- Program components that have received approval will display the state **Proposed – Proposal Approved**.
**Planned**  This state is when the program has been promoted to the planned state. At this state promotion, all program components are also promoted to the **Planned** state.

**Committed**  This is the state when sufficient, verifiable, viable content for the program is available, and approval is received to spend money to produce the program. A program can be in the **Committed** state when the financial approvals are received on the most recent financial figures if they differ by 10% from the initial estimates.

**Published**  A user will manually promote a program to the **Published** state after verifying if all the program components have been received in the warehouse.

**Retired**  The program is marked **Retired** when it is time to sunset the edition.

**Cancelled**  This is the state of the program when a user has identified and marked it as **Cancelled**, and there is no need to work the program.