INTEGRATED WORKFLOW
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01 PROGRAM PLANNING
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ABOUT THE WORKFLOW PHASES
Overview

In this Job Aid, you will learn how to:

1. Build or Modify TOC / Content Plan within CPT
   - Copy TOC / Content Plan into Another Component
   - Add Notes in TOC Manager
2. Move Uploaded Work Area (WA) Content into a PCS/Workflow-Linked TOC
   - Copy Entire Work Area (WA) Component TOC
   - Copy Individual Work Area (WA) TOC Items
3. Map Learning Objectives to Taxonomy
   - Map Learning Objectives via Learning Objectives Manager
   - Map Learning Objectives via Taxonomy Manager
4. Map Content to Taxonomy
5. Create Specs and Search for Assets
   - Create New Specification
   - Search for Assets to Reuse
   - Search for Specification
   - Reorder Specs
   - Move Specs

SYSTEMS & TOOLS

For this process, you will use the following systems and tools:

Content Planning Tool (CPT)
Overview

BACKGROUND

Content Planning is an integral part of the Integrated Workflow. In this phase the program is conceptualized. Throughout this phase, team members will create and refine the TOC / content plans by adding/ editing TOC items, Learning Objective and Taxonomy mappings, and asset specs for each component. This process is iterative. As the program moves through the Workflow, team members return to CPT and update the content plans as content is added or changed.

PURPOSE

During Content Planning, various tasks are performed in CPT. You upload or build the TOC, and map content and learning objectives to a taxonomy. The content plan is promoted to PCS, where XML code for the product is generated and sent to the rights management system (RMS) and DCTM production areas.

RESULTS

When a content plan is created in CPT:
• Content mappings and asset specs can be re-used in future products.
• The content plan is shared between Workflow systems like Documentum, PCS, and RMS.
1 | Build or Modify TOC / Content Plan within CPT

There are four ways to create a TOC / content plan. In this workflow step, you will learn one way: build it within CPT.

This way often applies to a first edition or new component, where the tools within CPT are used to build the content plan manually. If you already have a content plan, you can use the CPT tools to modify the content plan as needed.

The other three ways to create a TOC / content plan are:

- Request content prep for a revision
- Import content plan from published component in CPT (mainly for non-first editions and non-main title components)
- Fill out and upload TOC Ingestion spreadsheet (mainly for first editions and non-main title components)

1. At http://workflow.pearson.com, sign in with your Pearson system domain/user name and password, and then click the Publishing Control System (PCS) link. Refer to the Sign In/Sign Out Job Aid for additional details.

2. In PCS, select your program component in the Component Navigator.
3 Hover your mouse over the **Product** tab, and then click the **Content Plan** sub-tab.

4 If this is a first edition, no content plan exists yet. To create one via CPT, click the **Perform Content Planning** button.

**NOTES**

- The first time you access CPT for a program, you must access it via PCS by clicking the **Perform Content Planning** button. The **Unlock Content Plan** button will be inactive.

- If you modify an existing TOC / content plan, the content plan might be locked. If so, click the active **Unlock Content Plan** button before clicking the **Perform Content Planning** button.
5 The CPT application opens. The **TOC Manager** and the program component that you selected in PCS display. To add the first TOC item to the content plan, click the **Child** icon in the **TOC for component**: panel.

![TOC Manager](image)

**Quick Tip**
Click the **Program Component** dropdown menu to select a different component to work on.

6 Type the name of the TOC item, and then press **Return** on your keyboard.

![TOC Manager](image)

**More Info**
Refer to the **CPT Metadata Guide** for more information about TOC metadata.

**Note**
In order for content to be modular, do not type unit and chapter numbers in the TOC item name.

**For PC**
Press **Enter** on your keyboard.
7 Continue to build or modify the TOC using the toolbar in the **TOC for component**: panel. As you build a hierarchy in your content plan, click the expand icons to view the TOC items.

- **a** To add a TOC item at the same hierarchical level as the TOC item you have selected (not indented but flush), click the **Sibling** icon.
- **b** To add a TOC item that is indented beneath the TOC item you have selected, click the **Child** icon. This new TOC item is one level deeper in the hierarchy.
- **c** To cut a selected TOC item, click the **Cut** icon.
- **d** To copy a selected TOC item, click the **Copy** icon.
- **e** To paste a selected TOC item, click the **Paste** icon.
- **f** To delete a selected TOC item, click the **Delete** icon.

**Quick Tips**

- A child is a TOC item that is one level deeper (indented) into the hierarchy. Click the **Child** icon to create a child.
- A sibling is a TOC item that maintains the same level as the one from which it was created (not indented). Click the **Sibling** icon to create a sibling.
- Hover your mouse over the tool icons to view the names of the tools.

**More Info**

Deleted items and removed mappings can be restored from the Recycle Bin located in the Program Administration area. Refer to the **Restore Items using the Recycle Bin** job aid for more details on how to access and use the Recycle Bin.

**Notes**

The square icon to the left of each TOC item indicates the progress of content planning for that item.

- ✗ No mappings or specs
- ✗ Taxonomy mapped
- ✗ Taxonomy mapped and spec created
- ➡ Taxonomy and learning objective mapped
- ➡ Taxonomy and learning objective mapped, and spec created

**NOTE** You can reorder TOC items by drag-and-drop. As you drag, the **drag-and-drop** icon indicates which TOC item the selected item will be indented beneath when you drop it.
Copy TOC / Content Plan into Another Component

After you have built your TOC / content plan for a program component, you can copy it into other components to use as a starting point, and then modify as needed.

1. In the TOC Manager, select the source component from the Program Component drop-down menu.

   ![TOC Manager](image1)

   **Notes**
   - The source component contains the completed TOC / content plan that you want to copy.
   - The destination component is the component that you want to copy the content plan into.
   - When you copy a component, the entire plan inside the component’s TOC is copied.

2. The TOC for the selected component displays in the TOC for component: panel. From the Program Component toolbar, click the Copy (COPY) icon.

   ![TOC Manager](image2)

   **Notes**
   - The source component contains the completed TOC / content plan that you want to copy.
   - The destination component is the component that you want to copy the content plan into.
   - When you copy a component, the entire plan inside the component’s TOC is copied.
3 From the **Program Component** drop-down menu, select the destination component.

![Image of TOC Manager with Program Component selected](image)

**Notes**
- The source component contains the completed TOC / content plan that you want to copy.
- The destination component is the component that you want to copy the content plan into.
- When you copy a component, the entire plan inside the component’s TOC is copied.

4 Click the **Paste** icon.

![Image of TOC Manager with Paste icon highlighted](image)

5 A confirmation message appears. Click the **Yes** button to paste the TOC / content plan.

![Image of Warning dialog box](image)
6 The TOC / content plan from the source component is copied into the destination component and a confirmation message appears. Click the OK button, and then modify the copied TOC as needed.

**Notes**
- The source component contains the completed TOC / content plan that you want to copy.
- The destination component is the component that you want to copy the content plan into.
- When you copy a component, the entire plan inside the component’s TOC is copied.

**NOTE** When a TOC / content plan is copied into a component, all of the mappings and specs from the source TOC are copied over.
Add Notes in TOC Manager

As you build or modify your TOC / content plan, you can add, view, edit or delete notes to yourself or team members for any TOC item.

1. Select a TOC item in the TOC Manager, and then click the Notes tab.

More Info
- To learn more about the other tabs in the Detail Panel refer to the CPT Interface Quick Reference Guide.
- To learn more about the various tab’s metadata definitions refer to the CPT Glossary.
2. The Notes tab displays within the Detail Panel.
   
   a. View notes and creation dates in the Date and Note columns.
   b. Click the New icon to add a new note.
   c. Type a new note or edit an existing note in the text box.
   d. Click the Save button to save a new or edited note.
   e. Click the Cancel button to clear newly typed text.
   f. Select the note in the Note column, and then click the Delete icon to delete a note.

   ![Image of the Notes tab and note entry screen]

   **Notes**
   - To edit an existing note, first select it in the Note column.
   - You can edit other users’ notes. However, your edits will not be timestamped and your user ID will not appear.

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**NOTE** Notes can also be created at the program level by navigating to the Program Content Manager located under the Content menu in CPT.
Move Uploaded Work Area (WA) Content into a PCS/Workflow-Linked TOC

If your team uploaded TOC spreadsheet content into CPT, but not into a particular component, the content will be in a Work Area (WA).

In this workflow step, you copy and paste the entire Work Area TOC, or individual TOC items into a workflow component.

Note
TOCs of program components that were created in PCS and exist in CPT have (HE) at the end of their names. Work Area TOCs that are not linked to PCS have (WA) at the end of their names.
1. At [http://workflow.pearson.com](http://workflow.pearson.com), sign in with your Pearson system domain/user name and password, and then click the **Content Planning Tool (CPT)** link. Refer to the **Sign In/Sign Out Job Aid** for additional details.

2. At the **My Programs** screen, click the **Perform Content Planning** link for your program.

3. Click the **Content** menu, and then select **TOC Manager**.
Copy Entire Work Area (WA) Component TOC

1. In the TOC Manager, select the (WA) component that you want to copy into the (HE) component.

   ![TOC Manager](image)

   **Note**
   A TOC is also known as a content plan in CPT.

   **More Info**
   Refer to the CPT Interface Quick Reference Guide to learn how to manipulate the various panels within CPT.

2. Click the Copy icon in the Program Component tool bar to copy the (WA) TOC content to your clipboard.

   ![TOC Manager](image)

   **Quick Tip**
   The TOC for the selected component displays in the TOC for component panel.
3 In the TOC Manager, select the (HE) component that the (WA) content plan will be copied into.

**NOTE** If you select a component that already has TOC content, the TOC content you copied will overwrite it and a warning message will appear.
5 A confirmation message appears. Click the OK button.

6 The Work Area (WA) content appears within the (HE) component’s TOC.
Copy Individual Work Area (WA) TOC Items

1. In the **TOC Manager**, select a (WA) component to copy TOC items from.

2. In the **TOC for component** panel, select a TOC item from the list, and then click the **Copy** icon.

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**Note**

If you open two TOC Manager windows, you can drag-and-drop content across trees.
3 In the **TOC Manager**: 
   a. Select an **(HE)** component. 
   b. Select a TOC item. 
   c. Click the **Paste** icon.

4 The Work Area (WA) TOC item is copied to the (HE) component. If desired, type a new name for the copied TOC item.
Map Learning Objectives to Taxonomy

Learning objectives identify the goal of a learning experience, and taxonomies categorize content so it is easier to manage. Mapping your learning objectives to a taxonomy and then a taxonomy to your content increases efficacy by helping to plan content that is aligned to clear goals. In this Workflow step, you learn how to manually map learning objectives to a taxonomy.

1. At [http://workflow.pearson.com](http://workflow.pearson.com), sign in with your Pearson system domain/user name and password, and then click the **Content Planning Tool (CPT)** link. Refer to the **Sign In/Sign Out Job Aid** for additional details.

2. At the **My Programs** screen, click the **Perform Content Planning** link for your program.

![Please select the Task which you would like to Perform](image)

**NOTE** Shared learning objectives can be shared across programs, but it is possible to use program-specific learning objectives that only apply to one program only. The benefit of using shared learning objectives is that they can be mapped once and retain their mappings to taxonomies for use in any program, whereas program-specific learning objectives do not retain their mappings outside of their specific program.
Map Learning Objectives via Learning Objectives Manager

There are two ways to map learning objectives. You can either map them via the Learning Objectives Manager, or via the Taxonomy Manager.

1. Click the Learning Objectives menu, and then select the Learning Objectives Manager.

2. The Learning Objectives Manager displays. From the Learning Objective drop-down menu select a learning objective set.

More Info
Refer to the Fill out the Learning Objectives Spreadsheet section in the Editorial Assistant Content Planning Job Aid and the Upload the Learning Objectives Spreadsheet section in the Program Manager Content Planning Job Aid for information on ingesting learning objectives into CPT.

Note
You can map to multiple taxonomies if needed.
3. The learning objectives display. Select the learning objective you wish to align.

4. Click the **Taxonomy Mapping** tab. A list of taxonomies displays in the **Source Taxonomies** panel.

**More Info**
Refer to the [CPT Interface Quick Reference Guide](#) to learn how to manipulate the various panels within CPT.
5 Locate the appropriate taxonomy and then:

a. Click the **plus** icon to open it. The open taxonomy displays the **minus** icon.

b. Click the **expand** / **collapse** icons to view/hide the hierarchy.

### More Info
Refer to the [CPT Interface Quick Reference Guide](#) to see how variations appear in the CPT application.
6 To map learning objective(s) to a taxonomy term, at the **Source Taxonomies** panel, click the check box(es). The mapping automatically saves.

7 To remove a mapping:
   a Click the check box(es) to de-select and remove the green checkmark.
   
or
   b Click the Delete icon(s) in the **Mapped terms to...** panel.

8 Continue to select learning objectives and map them to taxonomy terms, until all learning objectives are mapped to the taxonomy.

**More Info**
Deleted items and removed mappings can be restored from the Recycle Bin located in the Program Administration area. Refer to the **Restore Items using the Recycle Bin** job aid for more details on how to access and use the Recycle Bin.

**More Info**
Refer to the **CPT Interface Quick Reference Guide** to learn how to manipulate the various panels within CPT.
NOTES

- Click the **Original** tab to view and add metadata.
- Click the **Variations** tab to view any variations. A variation is an alternate version of a learning objective, which might be added to present a different wording of the learning objective. Variations are marked with a V icon.
- Click the **Notes** tab to add notes. Click the **+** button, and then type your note. To save the note, click the **Save** button. Your note will appear in the **Note** panel along with the date and time. Other users can make changes/edits to notes that others begin, and there are no separations (example: time stamps or user ids) between the edits.
Map Learning Objectives via Taxonomy Manager

There are two ways to map learning objectives. You can either map them via the Taxonomy Manager, or via the Learning Objectives Manager.

1. Click the Taxonomy menu, and then select the Taxonomy Manager.

2. The Taxonomy Manager displays. Locate the appropriate taxonomy and then:
   a. Click the plus icon to open it. The open taxonomy displays the minus icon.
   b. Click the expand/collapse icons to view/hide the hierarchy.

More Info
Refer to the Fill out the Learning Objectives Spreadsheet section in the Editorial Assistant Content Planning Job Aid and the Upload the Learning Objectives Spreadsheet section in the Program Manager Content Planning Job Aid for information on ingesting learning objectives into CPT.

Note
Shared taxonomies display a icon.
3. Select a taxonomy you wish to align, and then select the Learning Objectives tab.

4. Learning Objectives display:
   a. Click the plus icon to open the learning objective. The open learning objective displays the minus icon.
   b. To map learning objective(s) to a taxonomy, at the Source Learning Objectives panel, click the check box(es). The mapping automatically saves.
   c. Mapped learning objectives immediately display in the Mapped Learning Objectives panel.

More Info
Refer to the CPT Interface Quick Reference Guide to learn how to search for taxonomies.
5 To remove a mapping:

a. Click the check box(es) to de-select and remove the green checkmark.

or

b. Click the Delete icon(s) in the Mapped Learning Objectives panel.

**NOTES**

- You cannot map content in the TOC Manager to a taxonomy from the Taxonomy Manager.
- Click the Original tab to view and add metadata.
- Click the Notes tab to add notes. Click the + button, and then type your note. To save the note, click the Save button. Your note will appear in the Note panel along with the date and time. Other users can make changes/edits to notes that others begin, and there are no separations (example: time stamps or user ids) between the edits.
- Click the Content Mappings tab view TOC nodes mapped to the taxonomy.

**More Info**

Refer to the [CPT Interface Quick Reference Guide](#) to learn how to manipulate the various panels within CPT.
4 Map Content to Taxonomy

In the Integrated Workflow, taxonomies are used to categorize content so it is easier to manage. Mapping your content to a taxonomy increases content reuse because the content can then be easily searched, selected, and incorporated in other components or programs. You map your content to a taxonomy for first editions as well as for revisions where there are editorial changes, such as new chapters or additional content.

1. At [http://workflow.pearson.com](http://workflow.pearson.com), sign in with your Pearson system domain/user name and password, and then click the Content Planning Tool (CPT) link. Refer to the Sign In/Sign Out Job Aid for additional details.

2. At the My Programs screen, click the Perform Content Planning link for your program.

3. Click the Content menu, and then select the TOC Manager.

Workflow Context

- If you have requested Content Prep, mappings are automatically created and you can update or add to the mappings later on.
- The taxonomy connects learning objectives and content as a hierarchy of topics or categories, which creates an organized alignment among all three. Instead of aligning individual learning objectives to individual content (TOC items) for each program, you align them to a taxonomy and see all the connections between the three parts.
- The taxonomy is created in a separate tool outside of the Workflow and then imported into CPT.
- You can only access the taxonomy via CPT. Taxonomies that are shared among multiple programs cannot be edited.
4 The **TOC Manager** displays. From the **Program Component** drop-down menu select a component.

![TOC Manager](image)

**Note**

TOCs of program components that were created in PCS and exist in CPT have **(HE)** at the end of their names. TOCs that are not linked to PCS have **(WA)** at the end of their names.

5 The TOC for the selected component displays in the **TOC for component:** panel. Click the **expand / collapse** icons to view/hide the TOC items and their content.

![TOC for component](image)

**More Info**

Refer to the [CPT Interface Quick Reference Guide](#) to learn how to manipulate the various panels within CPT.

6 Select the appropriate TOC item, and then click the **Taxonomy Mappings** tab.

![Taxonomy Mappings](image)
7 Locate the appropriate taxonomy and then:
   a. Click the plus icon to open it.
   b. Click the expand / collapse icons to view/hide the hierarchy.

8 To map the TOC item to a taxonomy term, in the Taxonomy panel, click the check box(es). The mapping automatically saves, and the taxonomy mapping appears in the right column.

**NOTE** When you select a taxonomy term in the Taxonomy terms mapped to... panel on the right, the learning objectives that are mapped to that taxonomy term display in the Learning Objectives mapped to... panel below.

**More Info**
Refer to the CPT Interface Quick Reference Guide to learn how to collapse and expand the various panels within the TOC Manager. Refer to the CPT Interface Quick Reference Guide to learn how to run a Content Title Search.

**Notes**
The square icon to the left of each TOC item indicates the progress of content planning for that item.

- No mappings or asset specs
- Taxonomy mapped
- Taxonomy mapped and Asset Spec created
- Taxonomy and Learning Objective mapped
- Taxonomy and Learning Objective mapped, and Asset Spec created
To remove a mapping:

a. Click the check box(es) in the **Taxonomy** panel to de-select and remove the green checkmark.

or

b. Click the **Delete** icon(s) in the **Taxonomy terms mapped to...** panel.

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**NOTES**

Click the:

- **Meta Data** tab to view and add metadata for the TOC item.
- **Notes** tab, and then click the **New** icon to add a note. To save the note, click the **Save** button. Your note will appear in the **Note** panel along with the date and time. Other users can change/edit notes that others begin, and there are no separations (timestamps or user IDs) between the edits.
- **Specs** tab to view asset specifications aligned to the TOC item.

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**More Info**

Deleted items and removed mappings can be restored from the Recycle Bin located in the Program Administration area. Refer to the Restore Items using the Recycle Bin job aid for more details on how to access and use the Recycle Bin.

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**Workflow Context**

You cannot add or delete a Higher Ed program component in CPT because it is linked to PCS.
5 Create Specs and Search for Assets (Skip, if Basic)

In CPT you create specifications and search for existing assets in Documentum (DCTM) to fulfill them. When you search for reusable assets using CPT, CPT sends DCTM the selected taxonomy term and then DCTM returns all assets associated with it.

**NOTE** Before you can search for reusable assets, your TOC items must be mapped to taxonomy terms.

In this Workflow step you create specs and search for existing assets to reuse.

1. At [http://workflow.pearson.com](http://workflow.pearson.com), sign in with your Pearson system domain/user name and password, and then click the **Content Planning Tool (CPT)** link. Refer to the **Sign In/Sign Out Job Aid** for additional details.

2. At the **My Programs** screen, click the **Perform Content Planning** link for your program.

**More Info**
The content plan in CPT should be up-to-date and contain the information about any and all assets used in a program component. For more information, refer to the **Build or Modify Content Plan** section of the this Job Aid.
Create Specs and Search for Assets

3. Click the Content menu, and then select TOC Manager.

4. The TOC Manager displays. From the Program Component drop-down menu, select a component.

   Note
   TOCs of program components that were created in PCS and exist in CPT have (HE) at the end of their names. TOCs that are not linked to PCS have (WA) at the end of their names.

   Quick Tips
   - Click the expand icons to expand the TOC heirarchy.
   - Click a TOC item to select it.

5. The TOC for the selected component displays in the TOC for component panel. Select a TOC item, and then click the Specs tab.

   Notes
   The square icon to the left of each TOC item indicates the progress of content planning for that item.
   - No mappings or specs
   - Taxonomy mapped
   - Taxonomy mapped and spec created
   - Taxonomy and learning objective mapped
   - Taxonomy and learning objective mapped, and spec created
Create New Specification

You create a new specification to define a new content asset.

1. Click the **Add new asset spec** icon on the **Specs** tab for your selected TOC item.

**Notes**
- You can align one or more asset specs to a TOC item.
- The program team determines the breadth of a TOC hierarchy. However, you add specs to the content plan where they make the most sense.

**NOTES**
- In Potential and Planned states if you see a **lock** icon on your spec it likely means that the content plan needs to be unlocked in PCS. Once unlocked, you can edit the spec.
- At the Planned state the Documentum folder structure is set up, and picked up items that are in place at the source will move over to the new folder structure. This means that a picked-up item is fulfilled, and will display the **fulfilled** icon.
- At the Committed state the specs are locked for modifications. You can delete or add specs, but cannot modify them, and a **lock** icon appears.

**Workflow Context**
In Content Prep a revision program’s content is prepped for content planning. During content prep, assets and specs from the previous edition become available in CPT. When your program is content prepped, be sure to check specs to ensure all assets are retained, and that all image types are correctly assigned (example: illustration, photograph, etc).
The **Meta Data** sub-tab displays. Provide content asset metadata. Required fields are marked with a red asterisk.

a. Type a title in the **Title** text box. This is a short descriptive title, and not a reference to where the item sits in the content plan.

b. Select an asset type from the **CC** drop-down menu.

c. Select the content type from the **CT1** drop-down menu: **Rich Media**, **Text**, **Image**, **Information Form**, or **Assessment**.

d. Select the content sub-type from the **CT2** drop-down menu.

e. Select **New** from the **Reuse Type** drop-down menu.

f. Type details about the item in the **Description** text box.

g. Populate the optional fields as needed: **Keywords**, **Audience**, **Instructions**, **Figure Num** and **Caption**.

h. Click the **Save** button to save the new spec.

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**Notes**

If an asset file is uploaded into DCTM but is not linked to your content plan or integrated workflow, then you must create a new spec for it in CPT. To create its spec select **New** from the **Reuse Type** drop-down menu.

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**Quick Tip**

To create a specification for an external web link, select **Web Resource** for **CC**. The **Reuse Type** defaults to **Pick up**. Type the link information into the **URL** text box, however this information is not required until the **Committed** state.

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**More Info**

The divided sections of the panels are movable, allowing you to enlarge or decrease the size of the panel you are working in. Refer to the CPT Interface Quick Reference Guide to learn how to manipulate the various panels within CPT.

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**Quick Tip**

Click the the **Channel** sub-tab to deselect components that should not use the spec.
Create Specs and Search for Assets

3 The newly created spec displays in the **Asset specs attached to:** panel.

Search for Assets to Reuse

1 Click the **Add new asset spec** icon or select an existing spec on the Specs tab for your selected TOC item.

2 The **Search** panel displays defaulting to the **Find Assets** sub-tab. Select a taxonomy term to search DCTM for reusable assets that are mapped to the term, and then click the **Search** button.

Workflow Context

In Content Prep a revision program’s content is prepped for content planning. During content prep, assets and specs from the previous edition become available in CPT. When your program is content prepped, be sure to check specs to ensure all assets are retained, and that all Image types are correctly assigned (example: illustration, photograph, etc).

Notes

- You can search for assets for reuse as long as your selected TOC item is mapped to a taxonomy term.
- The taxonomy mappings that appear in the Select dropdown menu are the taxonomy terms that are mapped to the TOC item.
Create Specs and Search for Assets

3 Search results display.
   a Click an icon next to View to view By Thumbnail or by By List.
   b Click an icon next to Sort by to sort files by Alphabetic sort or Sort by Kind.
   c Use the filters to narrow down your search by CC, CT1, CT2 and/or type a text string in the Text text box.
   d Click the Info/View Details icon to view a pop-up window containing metadata, rights information, and a larger thumbnail view for image assets.
   e Click the Add icon to add the asset to the Collected Asset/Spec references pane.
   f Click the Delete this Reference icon to remove an asset from the Collected Asset/Spec references pane.
   g Click the Add Metadata to Spec icon to add the asset’s metadata to the spec.
   h Click the Add to new asset spec icon to add the asset to a separate new spec. This can be used to take multiple collected items and split them out into their own specifications.

More Info
Refer to the CPT Interface Quick Reference Guide to learn how to manipulate the various panels within CPT.
4 In the **Meta Data** sub-tab, metadata from asset(s) added to the **Collected Asset/Spec references** panel display the fields. Select either **Pick up** or **Pick up & Modify** from the **Reuse** drop-down menu.

5 If you select **Pick up & Modify**, in the **Instructions** text box, type detailed instructions about how the asset should be modified, and then click the **Save** button.

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**More Info**

Refer to the **CPT Interface Quick Reference Guide** to learn how to manipulate the various panels within CPT.

**Notes**

- If the reuse type is **Pick up**, the asset is picked up from another source and not altered.
- If the reuse type is **Pick up & Modify**, the asset is picked up from another source and has alteration permissions.
- If an asset file is uploaded into DCTM but is not linked to your content plan or integrated workflow, then you must create a spec for it in CPT and select the appropriate reuse type.
6. If you select **Pick up**, a confirmation message appears. Click the **OK** button which will overwrite any metadata you may have entered with the metadata from the source item, and then click the **Save** button.

![Image of Pearson Integrated Workflow Content Planning](image)

**NOTE** If you add multiple assets to the **Collected Asset/Spec references** panel and select **Pick up** for the **Reuse Type**, only one asset can be used. Refer to the **Use** column to indicate the correct asset to pick up.

![Image of Collected Asset/Spec references](image)

**Quick Tips**
- Click the **Cancel** button, to retain your newly added metadata, and then change the reuse type to **Pick up & Modify**.
- The **Channel** sub-tab only displays if you have grouped components for combined content planning. Click the **Channel** sub-tab to deselect components that should not use this spec.

**Quick Tip**
If you want to use the multiple assets separately, click the **Add to new asset spec** icon, which will create separate new spec(s) for each asset.
Search for Specification

On the sub-tab, you can search for existing specifications within the same program to reuse them in other places.

1. On the tab, click the Add new asset spec icon for your selected TOC item.

2. The Search panel appears.
   a. Click the sub-tab.
   b. Click the Select drop-down menu, and select a taxonomy term.
   c. Click the button.

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PEARSON INTEGRATED WORKFLOW

CREATE SPECS AND SEARCH FOR ASSETS

SEARCH FOR SPECIFICATION

On the sub-tab, you can search for existing specifications within the same program to reuse them in other places.

1. On the tab, click the Add new asset spec icon for your selected TOC item.

2. The Search panel appears.
   a. Click the sub-tab.
   b. Click the Select drop-down menu, and select a taxonomy term.
   c. Click the button.
3. Search results from within the program display.
   
   a. Click the **Add** button to add the spec to the **Collected Asset/Spec references** panel.
   
   b. Click the **Info** button to view metadata information.
   
   c. Click the **Delete this Reference** icon to delete the reference; click the **Add Metadata to Spec** icon to add metadata to the spec; or click the **View Details** icon to view details.
4. Review the metadata in the top panel. You can reuse the specification as is by selecting Pick up for Reuse Type or you can make changes to this version of the spec by selecting Pick up and Modify for Reuse Type. When you are finished, click the Save button.

**NOTE** If you add multiple assets to the Collected Asset/Spec references panel and select Pick up for the Reuse Type, only one asset can be used. Refer to the Use column to indicate the correct asset to pick up.

**Quick Tip**
The Channel sub-tab only displays if you have grouped components for combined content planning. Click the the Channel sub-tab to deselect components that should not use this spec.

**Quick Tip**
If you want to use the multiple assets separately, click the Add to new asset spec icon, which will create separate new spec(s) for each asset.
Reorder Specs

After you have specs associated to the content, you can reorder specs on the Specs tab.

1. In the TOC Manager, select a TOC item and then click the Specs tab.

2. Specs display. Drag and drop the specs to reorder them as desired. For example, you may want to reorder specs by figure number.
Move Specs

If you have specs in the wrong place in the TOC hierarchy you can move them. On the Specs tab, you can select a spec and drag it to another spot in the TOC. The spec, as well as taxonomy mappings are moved with it.

1. In the TOC Manager, select a TOC item and then click the Specs tab.

2. Specs display. To move a spec, drag-and-drop the spec onto a TOC item in the TOC for component: panel.
3. The spec, along with its taxonomy mappings, is moved to its new position in the TOC hierarchy.