

	<b>FUNCTIONAL ANALYSIS AND DESIGN – NEW DOCUMENTS RELEASE 3</b>	<b>Project / Subproject:</b> PLAN-JO No. 10030 / R3
		<b>Reference Number / Version:</b> D.FAD / 0.03

**PLAN-JO – RELEASE 3**

Functional Analysis and Design – New Documents  
Preliminary version

Release 3

Version 0.03

22/01/2009


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## DOCUMENT HISTORY

Version	Date	Author	Reason for Modification	Action <sup>(*)</sup>	Confidentiality	Pages

(\*) Action: C= Creation, I=Insert, U=Update, R=Replace, D=Delete

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CIRCULATION LIST

Person Name	Organisation Name

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## APPLICABLE AND REFERENCE DOCUMENTS

<b>Type (*)</b>	<b>Title</b>	<b>Identification</b>	<b>Ver</b>	<b>Date</b>
A1	ITT No 10030 - Technical specifications	Annex 1 to Contract		
A2	ITT No 10030 - Software Requirements Specification	Annex 1.A to the Technical Specification		
R1	D.FAD-Functional Analysis and Design		1.00	18/10/2006
R2	D.FAD-Functional Analysis and Design R2		0.05	20/02/2008
R3	D.FAD-Functional Analysis and Design R3 – Printer Interface		0.02	10/12/2008

(\*) : *Reference document, Applicable document*

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## 1 Introduction

This document covers the functional specifications of Release 3 with regard to the New Document Types that will be included in PLAN-JO as defined in A2.

For a description of the 1<sup>st</sup> and 2<sup>nd</sup> releases of the Plan-JO system please refer to D.FAD-Functional Analysis and Design R1 and to the D.FAD-Functional Analysis and Design R2 documents.

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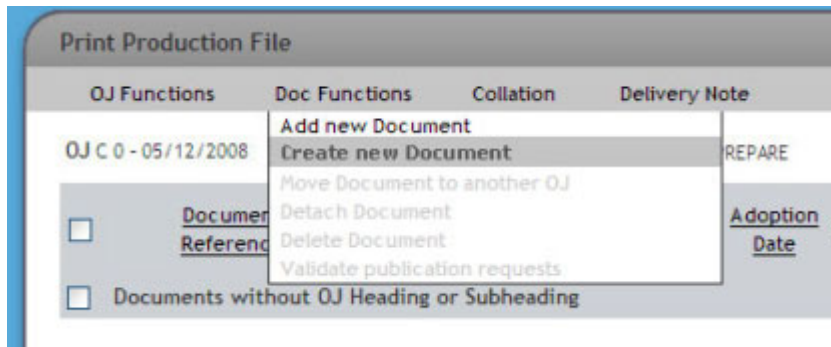
## 2 New documents

### 2.1 Upload document

#### 2.1.1 Create APA and other Documents through the PPF

A new function “Create New Documents” will be added in the PPF. This function will enable the user to create documents without attachments. The process for this is described below:

1. The PA accesses the PPF of an OJ.
2. He selects the new function “Create New Documents” under “Doc Functions” Menu.



**Figure 1: Create New Documents Menu**

3. A new form is presented with the title “Create New Documents”. The PA selects the number of documents to be created and the Document Type from a drop down list.

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**Create New Document**

**No of Docs**

**Document Type** ▼

Next

AGR  
OTHER  
AM.PROP.DEC  
AM.PROP.DIR  
AM.PROP.REG  
BUDGET  
ANNEX.BUDGET  
CASE  
COMMUNIC  
COM.POS  
COMPETITION  
CORRIGENDA  
DEC  
DEC.ECSC  
DEC.EEA  
DIR  
ECU.D  
ECU.DMR  
ECU.DR  
GREENPA  
INFO  
INFO.CJT

?

Create Cancel

**Figure 2: Create New Documents Function I**

- Clicking on the “Next” button, the system will generate a number of rows (same with the number of documents). Each row represents a document to be created. The manuscript reference of those documents is the combination of the creation date (shown automatically by the system) and a text field that the user will fill in manually. In addition, the institution of each document should be updated (if needed). The default value of the Institution is the “COM”.

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**Create New Document**

**No of Docs**  **Document Type**

Manuscript Reference	Institution
20081212	<input type="text" value="COM"/>
20081212	<input type="text" value="COM"/>
20081212	<input type="text" value="COM"/>

**Figure 3: Create New Documents Function II**

Note: In case the manuscript reference along with the institution is already assigned to another document, the system will present a restriction message. The PA should modify the appropriate fields and click on “Create” button to create the documents.

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**Create New Document**

\* The Manuscript Reference has been assigned to other Document

**No of Docs**

**Document Type**

	Manuscript Reference	Institution
*	20081212 APA1	COM
	20081212 APA2	COM
	20081212 APA3	COM

**Figure 4: Create New Documents Function III**

5. The system will create the OJ Documents without any files attached in the Current LVs folder or other folders. The Document Metadata will be automatically filled in according to the document type from an XML template provided by the Publications Office. A new workflow for processing will be generated for each document for the appropriate PA group.
6. The created documents will be also attached to the OJ and presented in the PPF at the end of the upload. The order of the documents on the PPF will be the same with the creation order (from the “Create New Documents” form).

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Print Production File

OJ Functions Doc Functions Collation Delivery Note

OJ C 0 - 05/12/2008 6302 LOT 9: Jouve Total pages: STATUS: PREPARE

<input type="checkbox"/>	<u>Document Reference</u>	<u>Manuscript Reference</u>	<u>Document Type</u>	<u>Duration</u>	<u>Short Title</u>	<u>Adoption Date</u>	<u>Signatory</u>	<u>Official No. Seq.</u>	<u>Official No.</u>	<u>Treaty Reference</u>	<u>Start Page</u>	<u>End Page</u>
<input type="checkbox"/>	Documents without OJ Heading or Subheading											
<input type="checkbox"/>	<a href="#">20081212-002</a>	20081212-APA1	APA				OTHER				0	0
<input type="checkbox"/>	<a href="#">20081212-003</a>	20081212-APA1	APA				OTHER				0	0
<input type="checkbox"/>	<a href="#">20081212-004</a>	20081212-APA1	APA				OTHER				0	0

**Figure 5: PPF with the created documents**

Requirements:

- XML files with the document metadata may be used that will be filled in automatically according to the document type. This needs to be defined by the Publications Office.

### 2.1.2 Upload document – No unzip option

There are cases where documents have a large number of Files and therefore are required to remain as zip files in all their lifecycle. In this case the user will upload them in PLAN-JO in zip files.

A new functionality will be included in the “Upload” module in case the user wants to upload and keep the uploaded zipped files as they are in the system.

In the new Upload functionality, a new check box “No unzip” will be added in the “Attach files” tab. The zip files will be uploaded in the Current LVs folder in zip format. The system shall check whether the zip file is empty or not but will not unzip it. The upload function and the created workflow for processing the document will remain the same as for all other documents.

Documents uploaded with the "No unzip" function selected are not sent to OJ-Format even if the "Exclude OJ-Format" check box has not been selected.

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New Document: Author Service Upload: Attach files

1. Create 2. Info 3. Select Production Agent Group 4. Attach files 5. Attach email

INFORMATION: The upload procedure may take a few minutes. Please do not close your browser.

Language versions previously uploaded:

☐ bg ☐ cs ☐ da ☐ de ☐ el ☐ en ☐ es ☐ et ☐ fi ☐ fr ☐ ga ☐ hu  
☐ it ☐ lt ☐ lv ☐ mt ☐ nl ☐ pl ☐ pt ☐ ro ☐ sk ☐ sl ☐ sv ☐ all

Language versions to be attached:

☐ bg ☐ cs ☐ da ☐ de ☐ el ☐ en ☐ es ☐ et ☐ fi ☐ fr ☐ ga ☐ hu  
☐ it ☐ lt ☐ lv ☐ mt ☐ nl ☐ pl ☐ pt ☐ ro ☐ sk ☐ sl ☐ sv ☐ all

Comments:

☐ No Attachments ☐ No Unzip  
☐ Exclude OJ-Format

Selected Files:

Add Files Remove

Previous Next OK Cancel

Figure 6: Upload Author Files – No unzip

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Note: Theoretically these documents will not be dispatched to Prior-reading but the system will keep the function enabled.

## **2.2 Parent and Child Documents**

Many large documents need to be handled in segments and are also sent to the printer as such. In order to handle these types of documents effectively in PLAN-JO, a new entity will be implemented. A new system entity will be created and labelled “Parent Document”, under this main document, additional documents may be attached as children. The children documents will belong solely to the Parent document and can be treated as separate “segments” to this document. The children documents are able to follow the same workflow paths as normal documents in the system with specific exceptions however.

The “Parent” document in the system will represent and be treated by the system as one single document entity which is linked to the child documents. This means that the Parent document will have all the necessary forms of a normal document, but will not have any workflows such as Prior-reading, Proofreading or Dispatch to Printer. These workflows will be handled in the Child document Level. In the Parent Document Level, the forms Metadata, Budget Request (Publication Request) and Prepress Request (Print Instruction Form) will be stored and populated to the Child Level.

The following sections describe the above mentioned functionality in more detail:

### **2.2.1 Create Parent Document**

A new Parent Document can be created by following the steps below:

1. The PA selects the function “Upload Author Files” as usual.
2. In the “Create” tab, a new button will be implemented “Create Parent Document”. The PA fills in the at least the mandatory fields “Manuscript reference” and the “Institution” and clicks the “Create Parent Document” button.

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New Document: Author Service Upload: Create

1. Create 2. Info 3. Select Production Agent Group 4. Attach files 5. Attach email

INFORMATION: The upload procedure may take a few minutes. Please do not close your browser.

Manuscript reference:  \*

Existing XML reference data:  Browse...

Institution:  \*

Contact person:

Department:

New Document Update Document Link to Parent Document Create Parent Document

\* Mandatory fields

? OK Cancel

**Figure 7: Upload Author files – Create Parent Document**

- The Metadata form will be displayed and the user fills in the appropriate fields. The Metadata form remains the same as the present one. However, a new field is added under the Document Reference to indicate that this is a Parent Document.

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**Figure 8: Create Parent Document – Metadata Form**

- Using Next button the PA navigates to the next tabs of the upload. The tab “Select Production Agent Group” will be read only and automatically filled in by the current group. The tab “Attach files” will be skipped and disabled as there are no files to be uploaded. The last tab “Attach email” enables the user to upload files into the “Correspondence” folder of the Document.
- When the user finishes the upload pressing the “OK” button, the system creates the document in a new folder in the Repository Root called “Parent Docs in Progress” (see section 2.2.2 Repository Root).

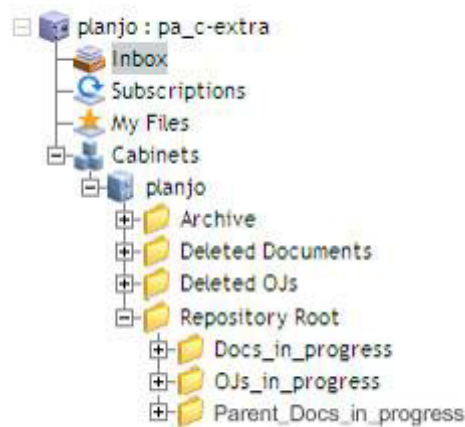
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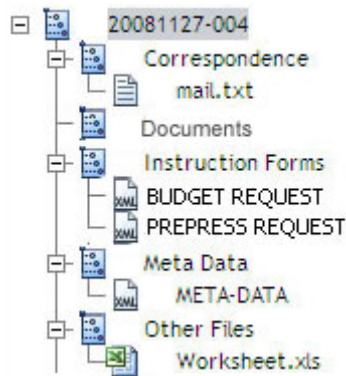
### 2.2.2 Repository Root

A new folder called “Parent Docs in Progress” folder will be added in the Repository Root to store the Parent documents. When accessing the “Parent” document, the user will see a Document Manager similar to the current Document Manager, with the following folders:

- Metadata
- Instructions Form: to store the Budget Request (Publication Request), Prepress Request (Print Instruction Form)
- Correspondence
- Other files
- Documents: links to the virtual Child documents (Document Manager links)



**Figure 9: Repository root**



**Figure 10: Parent Document Manager**

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Search: 20081127-004 Go Advanced... Preferences Logout Help

File Edit View Forms Dispatch Publication request Split Document Concordance Functions Reports Production View

Go to Inbox  
planjo / planjo / Repository Root / Docs\_in\_progress\_Parent\_Documents / 2008 / 11 / 27  
Virtual Document Manager: View Components

20081127-004  
OJ Manuscript Reference: test\_notification  
Demed Reference No:  
Date Modified: Dec 9, 2008 7:24:15 PM  
Demed Status: NOT\_CREATED  
Demed Progress: UNINITIALISED

Meta-Data Send To Printer Default Child Version: CURRENT

Name	Version	Size	Modified	Modifier
Correspondence (1)	CURRENT,1.0	1 KB	09/12/2008 18:30	dmadmin
Instruction Forms (2)	CURRENT,1.0	1 KB	27/11/2008 17:58	pa_i-2_test
Meta Data (1)	CURRENT,1.0	1 KB	04/12/2008 18:56	dmadmin
Other Files (1)	CURRENT,1.0	1 KB	27/11/2008 17:58	dmadmin
Documents (0)	CURRENT,1.0	1 KB	27/11/2008 17:58	pa_i-2_test

No Messages

Figure 11: Parent Document Manager – Folders' Content

Search: 20081127-004 Go Advanced... Preferences Logout Help

File Edit View Forms Dispatch Publication request Split Document Concordance Functions Reports Production View

Go to Inbox  
planjo / planjo / Repository Root / Docs\_in\_progress\_Parent\_Documents / 2008 / 11 / 27  
Virtual Document Manager: View Components

Documents  
20081127-004  
OJ Manuscript Reference: test\_notification  
Demed Reference No:  
Date Modified: Dec 9, 2008 7:24:15 PM  
Demed Status: NOT\_CREATED  
Demed Progress: UNINITIALISED

Meta-Data Send To Printer Default Child Version: CURRENT

Name	Version	Size	Modified	Modifier
20081212-002	CURRENT,1.0	1 KB	09/12/2008 18:30	dmadmin
20081212-003	CURRENT,1.0	1 KB	27/11/2008 17:58	dmadmin
20081212-004	CURRENT,1.0	1 KB	04/12/2008 18:56	dmadmin

No Messages

Figure 12: Parent Document Manager – Document Folder

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The functions that will be available from within the Parent Document Manager are the following:

- Metadata
- Forms
  - Prepress Request (Print Instruction Form)
- Budget Request menu
  - Create/Update Budget Request (Publication Request)
- Functions
  - Attach Document
  - Detach Document
  - Move Document
  - Delete Document
  - Go to PPF
- Upload Files
  - Upload Other files
  - Upload Correspondence

In case of Delete Document Function, the attached (child) documents will be deleted along with the Parent document.

### **2.2.3 Search for Parent Document**

The Parent Documents will be included in both the Quick Search and the Advanced Search Function. In the Advanced Search Function, a new Search Criteria will be added to enable the user to perform searches according to this feature (Parent or Normal Document). The new criteria will be named “Documents” and will be a radio button with the following options:

- All: To search to all the documents (Parent and Regular). This will be the default value.
- Parent: To search to Parent Documents only.
- Regular: To exclude the Parent Documents from the search.

### **2.2.4 Create (Child) Document and Link to the Parent Document**

In order to create the (Child) Document and link it to the Main (Parent) Document the user will follow the next steps:

1. The PA selects the function “Upload Author Files” as usual.
2. In the “Create” tab, a new button will be implemented “Link to Parent Document”. The PA fills in the mandatory fields Manuscript reference and the Institution; all other fields will be copied from the Parent document. The user then clicks on the button “Link the Child document”. Please see figure below:

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**Figure 13: Upload Author files – Link to Parent Document**

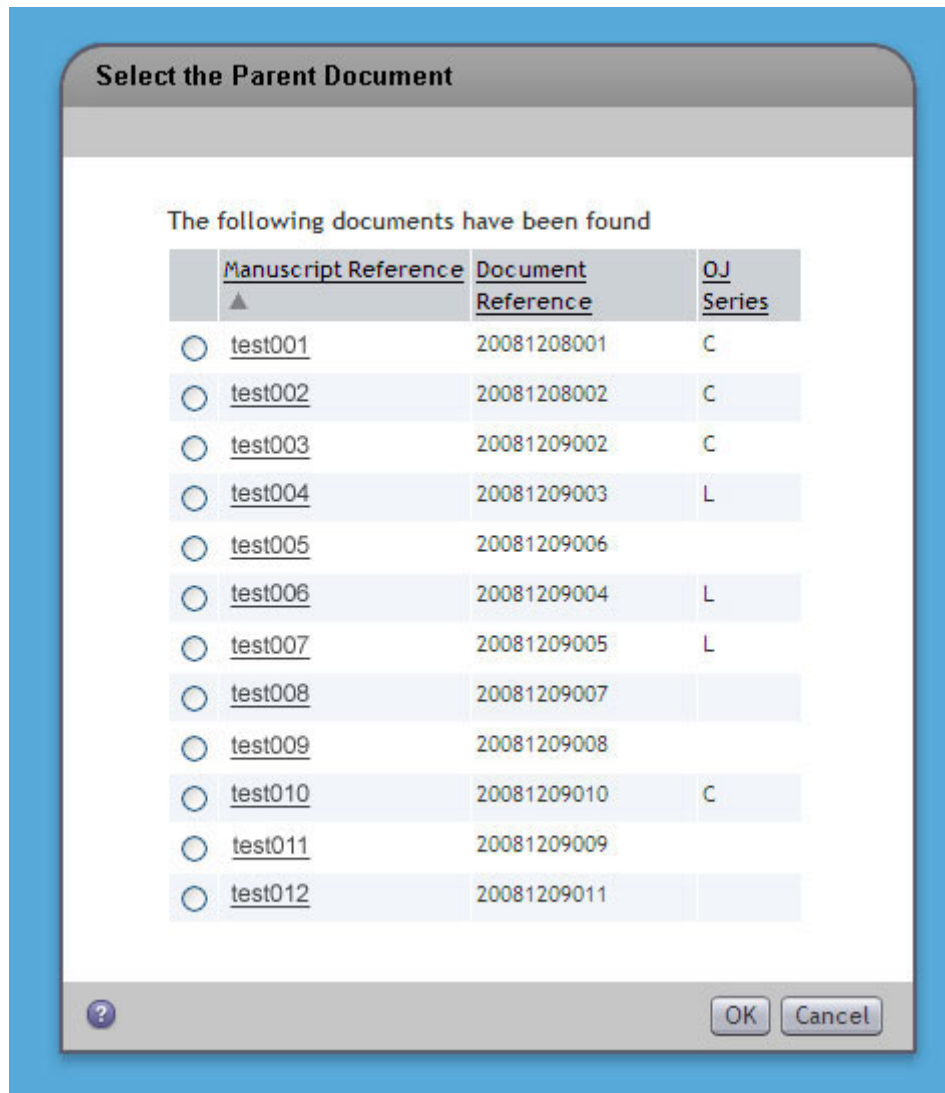
3. A list with all the available Parent Documents will be shown. The PA will select the Parent Document to link the new (child) document that is being uploaded.

Note: Available Parent Documents are all the Parent Documents that are still in Progress and not Archived.

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**Figure 14: Upload Author files – Select Parent Document**

- The system will continue to the “Info” tab and will show the metadata automatically, which will automatically be filled in from the Parent Document. In the Metadata form under the Document reference of the Child Document, the Document Reference of the Parent Document will be presented.  
**Note:** The Metadata form for the Child documents will be in read-only mode.

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**Figure 15: Create Child Document – Metadata Form**

No other change to the “Create Author Files” function will be done. The workflow for the Child document can follow the same paths as already implemented in the previous releases. In other words, they can be sent for prior-reading, to the printer, for proof-reading and also receive control proofs. However, they will not have available the following functions which will remain at the Parent document level:

- Send, Create/Update Publication Request
- Attach Document
- Detach Document
- Move Document

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When linking the child document to the Parent document, the system will fill in automatically the Metadata form and the Publication request from the Parent document. In fact no user will be able to modify these two forms from the child document. The modifications should always be made to the Parent Document and will this in turn will populate the metadata in all the Child documents.

Apart from those two forms, the workflows for the Child document can follow the same workflows as for all the documents.

**Note:** Concerning the dispatch to printer workflow for a (child) document, before dispatching, the Publication Request of the Parent document must be created and a DEMED number should be assigned.

#### **2.2.5 Dispatch to Printer / Prepress Request (Print Instruction Form)**

The Prepress Request will be created in the Parent Document Level and copied to the Child documents. In order to dispatch a Child document to the printer the PA will access the pre-filled Prepress Request for the child document. In the form, the Parent Document Manuscript and Document Reference will be presented for consultation and correct communication with the printer. This information will also be added in the xml that will be exchanged with the Printer.

In this form he PA will only be able to modify only Comments field and the Number of Pages. The field “Number of pages” is not linked to the Metadata of the document as this field is applicable to the Child document only, while all other Metadata are linked to the Parent Document.

#### **2.2.6 Archive Parent Documents**

The archiving method will remain the same as it is at the moment. The system will archive the Parent Document under an OJ. The Child documents will be stored under the Parent document.

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### 3 USE CASES

The following represent functional requirements, in terms of Use Cases for the new documents which will be delivered in release 3 of PLAN-JO.

The table below is a list of Use Cases corresponding to the analogous users involved.

Actor	Identifier	Use Case
Production Agent / OJ Collator, Production Coordinator	UC-0101	Create Documents through the PPF
	UC-0102	Create Parent Document
	UC-0103	Upload Child Document
	UC-0104	Dispatch Manuscripts to Printer – Child Document
Reception Agent, Production Agent / OJ Collator, Production Coordinator	UC-0201	Upload Author files without unzip

**Table 1: Table of Use Cases**

#### 3.1 Production Agent

##### 3.1.1 UC-0101 – Create Documents through the PPF

<i>Use Case ID</i>	UC-0101
<i>Use Case Name</i>	Create Documents through the PPF
<i>Actors</i>	Production Agent / OJ Collator, Production Coordinator
<i>Description</i>	Documents without attachments are created through the PPF and attached to the OJ. The document structure will be automatically created. The metadata form will be filled in automatically if there are default values for the selected document Type.
<i>Pre-conditions</i>	<ul style="list-style-type: none"> <li>■ The OJ has status 'PREPARE' or 'CREATED'.</li> </ul>
<i>Post-conditions</i>	<ul style="list-style-type: none"> <li>■ Documents are created and stored under the 'Docs in Progress' Repository folder.</li> <li>■ Documents Metadata form is filled in automatically according to a predefined template for the selected Document Type (if it exists)</li> <li>■ Documents are attached to OJ.</li> </ul>
<i>Main success scenario</i>	1. Actor starts the Use Case by accessing the 'Production view' from the menu.

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	<ol style="list-style-type: none"> <li>2. Actor browses the calendar and clicks on an OJ link.</li> <li>3. System displays the corresponding Print Production File.</li> <li>4. Actor selects the function “Create New Documents” under “Doc Functions” Menu.</li> <li>5. System accesses the form “Create New Documents”.</li> <li>6. Actor types the number of documents that they want to create and selects the document type from a drop-down list. Actor presses the ‘Next’ button.</li> <li>7. System generates a number of rows within the form (same with the number of documents) that represent the documents to be created. System prompts the user to fill in their Manuscript Reference that already are prefixed with the creation date.</li> <li>8. Actor fills in the Manuscript References and the Institution of each document and clicks the ‘Create’ button.</li> <li>9. System checks if the Manuscript References along with the Institution are unique. If not the user is prompted to modify them and resubmit. If ok, system creates the OJ Documents without any files attached in the Current LVs folder or other folders. The Document Metadata will be automatically filled in according to the document type. The Documents are attached in the OJ with the same ordering as in the form.</li> <li>10. New tasks are created for the PA group for Processing.</li> </ol>
<i>Alternative sequence</i>	<p>1+2. Actor can start the Use Case from a specific Print Production File, without browsing.</p> <p>1+2. Actor can start the Use Case from a specific OJ by accessing its Print Production File from the menu.</p>
<i>Failure sequence</i>	
<i>User interface</i>	

### 3.1.2 UC-0102– Create Parent Document

<i>Use Case ID</i>	UC-0102
<i>Use Case Name</i>	Create Parent Document
<i>Actors</i>	Production Agent / OJ Collator, Production Coordinator
<i>Description</i>	The Upload Author Files Procedure is used to create a Parent Document.
<i>Pre-conditions</i>	<none>
<i>Post-conditions</i>	<ul style="list-style-type: none"> <li>■ The Parent Document is created and stored under the ‘Parent Docs in</li> </ul>

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	Progress' Repository folder.
<i>Main success scenario</i>	<ol style="list-style-type: none"> <li>1. Actor selects the function "Upload Author Files" from the "File" Menu in the Inbox.</li> <li>2. In the "Create" tab, actor fills in at least the mandatory fields Manuscript reference and the Institution and clicks on the button "Create Parent Document" to create the Parent Document.</li> <li>3. System checks that the combination of Manuscript Reference and the Institution is unique to allow the upload. If not, the system presents an error message and prompts the user to modify the fields.</li> <li>4. In the next tab "Info", the Metadata form is displayed and the actor fills in the appropriate fields.</li> <li>5. Using Next button the actor navigates to the next tabs of the upload. The tab "Select Production Agent Group" is read only and automatically filled in by the current group. The tab "Attach files" is skipped as there are no files to be uploaded. In the last tab "Attach email", actor uploads a file with the email communication with the author (optional step).</li> <li>6. Actor finishes the upload pressing the "OK" button.</li> <li>7. System creates the document in a new folder in the Repository Root called "Main Docs in Progress", fills in the metadata form and all the corresponding fields are populated to the forms "Prepress Request" and "Budget Request". The email is stored under the "Correspondence" folder of the Document.</li> </ol>
<i>Alternative sequence</i>	
<i>Failure sequence</i>	
<i>User interface</i>	

### 3.1.3 UC-0103 – Upload Child Document

<i>Use Case ID</i>	UC-0103
<i>Use Case Name</i>	Upload Child Document
<i>Actors</i>	Production Agent / OJ Collator, Production Coordinator
<i>Description</i>	The Upload Author Files Procedure is used to create a Child Document and link it to the Parent Document.
<i>Pre-conditions</i>	<ul style="list-style-type: none"> <li>■ At lease one Parent Document in Progress exists.</li> </ul>
<i>Post-conditions</i>	<ul style="list-style-type: none"> <li>■ The Child Document is created and stored under the "Docs in Progress" Repository folder.</li> </ul>

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	<ul style="list-style-type: none"> <li>The Child Document is linked to the Parent Document. A new link is added in the folder “Documents”</li> </ul>
<i>Main success scenario</i>	<ol style="list-style-type: none"> <li>Actor selects the function “Upload Author Files” from the “File” Menu in the Inbox.</li> <li>In the “Create” tab, actor fills in at least the mandatory fields Manuscript reference and the Institution and clicks on the button “Link to Parent Document” to create the Child Document.</li> <li>System checks that the combination of Manuscript Reference and the Institution is unique to allow the upload. If not, the system presents an error message and prompts the user to modify the fields. System presents a form with all the available Parent Documents that are in Progress.</li> <li>Actor selects the Parent Document through a radio button to continue with the upload and also link the Child Document to a Parent Document.</li> <li>In the next tab “Info”, the Metadata form is displayed in read-only format. The form is filled in with the Metadata of the Parent Document.</li> <li>Using Next button the actor navigates to the next tabs of the upload. The tab “Select Production Agent Group” is read only and automatically filled in by the current group.</li> <li>In the tab “Attach files”, actor selects the Languages to be uploaded and files to be uploaded. He also adds comments (optional step).</li> <li>In the last tab “Attach email”, actor uploads a file with the email communication with the author (optional step).</li> <li>Actor finishes the upload pressing the “OK” button.</li> <li>System creates the document in a new folder in the Repository Root called “Docs in Progress” and also links the document to the Parent Document. In the folder “Documents” of the Parent Document, a link to the Child Document is stored.</li> </ol>
<i>Alternative sequence</i>	
<i>Failure sequence</i>	
<i>User interface</i>	

#### 3.1.4 UC-0104 – Dispatch Manuscripts to Printer – Child Document

<i>Use Case ID</i>	UC-0104
<i>Use Case Name</i>	Dispatch Manuscripts to Printer – Child Document
<i>Actors</i>	Production Agent / OJ Collator, Production Coordinator

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<i>Description</i>	Manuscripts are sent to the Printer for the Child Document
<i>Pre-conditions</i>	<ul style="list-style-type: none"> <li>■ Receive Manuscripts from Authors.</li> <li>■ DEMED Status is “VALID” or PC has received task to override it and send the document to Printer.</li> </ul>
<i>Post-conditions</i>	<ul style="list-style-type: none"> <li>■ The status of LV’s has changed accordingly.</li> <li>■ A snapshot is kept in “Sent to Printer” folder of all files, Prepress Request and model sent to Printers.</li> <li>■ Acknowledge message “OK” that the package is received from the Printer (optional).</li> </ul>
<i>Main success scenario</i>	<ol style="list-style-type: none"> <li>1. Actor browses the tasks assigned to his team (Inbox).</li> <li>2. Actor selects a task for a document</li> <li>3. Actor accepts the task.</li> <li>4. Task disappears from all other Inboxes which it has co-existed.</li> <li>5. Actor selects files to send to the Printer from within the task.</li> <li>6. Actor selects the function ‘Dispatch to Printer’ from the menu.</li> <li>7. System presents the ‘Prepress Request’ for the Manuscripts. The form is pre-filled from the Parent Document’s “Prepress Request”.</li> <li>8. Actor can fill in only the ‘Comments’ and the ‘Number of Pages’ fields and press ‘Send files to printer’ button to send the Manuscripts to the Printer.</li> <li>9. The system sends Manuscripts (doc), model (pdf), Prepress Request (pdf + xml) and an envelope xml file in a zip file to the printer using ftp.</li> <li>10. The status of the exchange messages concerning is set to ‘In Progress’.</li> <li>11. Printer sends an Acknowledge message ‘OK’ that the package is received (optional step).</li> <li>12. The message exchange status changes to ‘Received’.</li> </ol>
<i>Alternative sequence</i>	<ol style="list-style-type: none"> <li>1. Actor access the Document Manager of the appropriate document</li> <li>2. Actor selects the button ‘Send To Printer’.</li> <li>3. The system prompts the user to Select Proof Or Lvs For Printer Dispatch. Actor selects ‘Current LVs’ and presses the ‘OK’ button.</li> <li>4. User selects the files to be sent to the printer from the presented list.</li> </ol> <p>Continue from 7.</p>
<i>Failure sequence</i>	

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<i>User interface</i>	
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### 3.2 Reception Agent, Production Agent

#### 3.2.1 UC-0201 – Upload Author files without unzip

<i>Use Case ID</i>	UC-0104
<i>Use Case Name</i>	Upload Author files without unzip
<i>Actors</i>	Reception Agent, Production Agent / OJ Collator, Production Coordinator
<i>Description</i>	The actor uploads manuscripts that have been sent from the Author service via e-mail. The manuscripts are uploaded in zip files and are not unzipped.
<i>Pre-conditions</i>	<ul style="list-style-type: none"> <li>■ Author Service sends email with at least one zip file to the PA.</li> </ul>
<i>Post-conditions</i>	<ul style="list-style-type: none"> <li>■ The Document is created and stored under the “Docs in Progress” Repository folder.</li> <li>■ No Document files are sent to OJ-Format.</li> </ul>
<i>Main success scenario</i>	<ol style="list-style-type: none"> <li>1. Actor selects the function “Upload Author Files” from the “File” Menu in the Inbox.</li> <li>2. In the “Create” tab, actor fills in at least the mandatory fields Manuscript reference and the Institution and clicks on the button “New Document” to create the Document.</li> <li>3. System checks that the combination of Manuscript Reference and the Institution is unique to allow the upload. If not, the system presents an error message and prompts the user to modify the fields.</li> <li>4. In the next tab “Info”, the Metadata form is displayed and the actor fills in the appropriate fields.</li> <li>5. Using Next button the actor navigates to the next tabs of the upload. The tab “Select Production Agent Group” is presented and the RA selects the PA Group that will receive the Upload task. In case of PA or PC users the tab is read only and automatically filled in by the current group.</li> <li>6. In the tab “Attach files”, actor selects the Languages to be uploaded. He selects a zip files to be uploaded and the check-box “No unzip”. He also adds comments (optional step).</li> <li>7. In the last tab “Attach email”, actor uploads a file with the email communication with the author (optional step).</li> <li>8. Actor finishes the upload pressing the “OK” button.</li> <li>9. System creates the document in a new folder in the Repository Root</li> </ol>

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	called “Docs in Progress”. In the folder “Current LVs” of the Document Manager, the zip file is stored as is (normally system would unzip the files).
<i>Alternative sequence</i>	
<i>Failure sequence</i>	
<i>User interface</i>	

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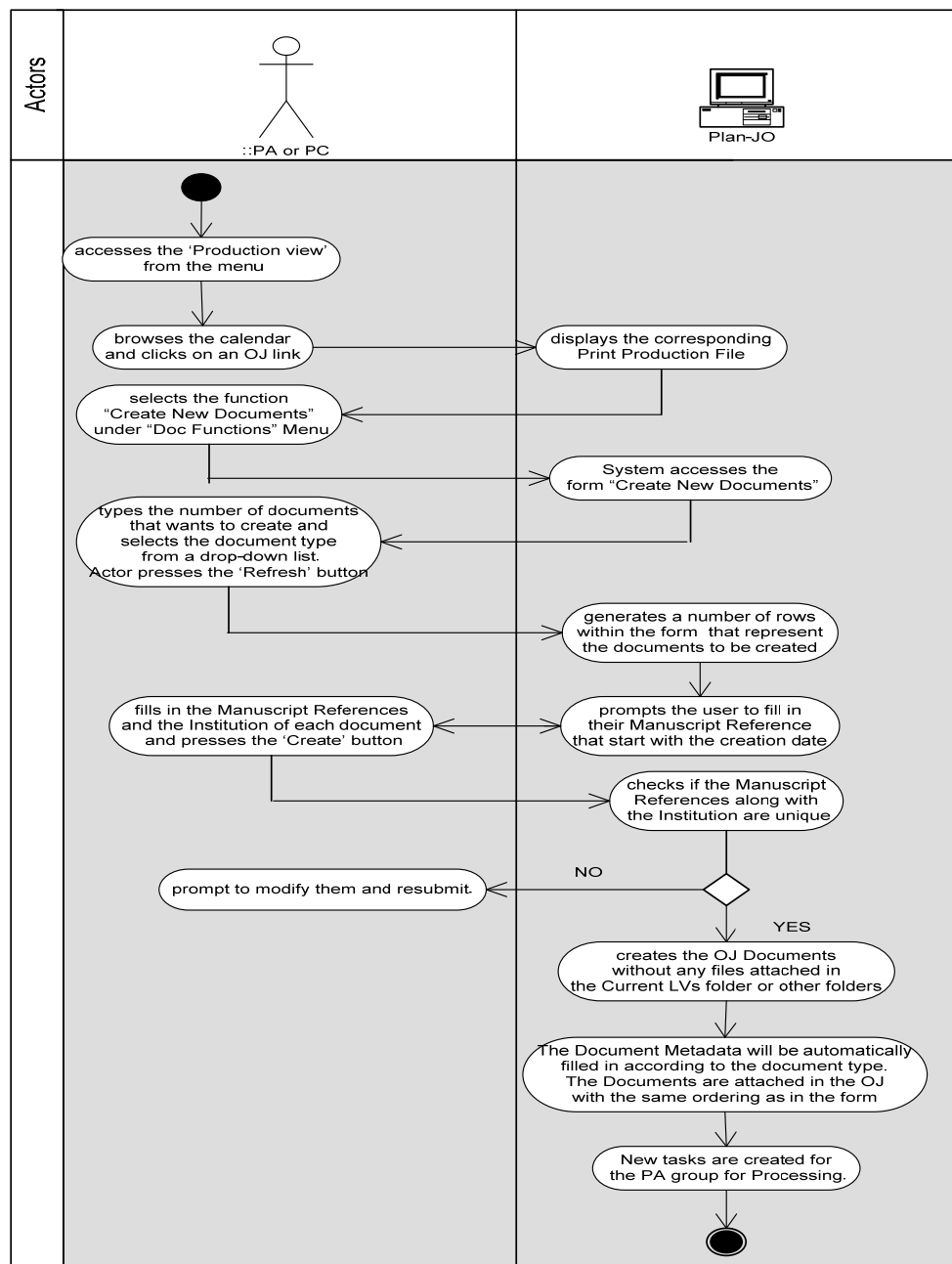


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## 4 UML Diagrams

### 4.1 Activity Diagrams

#### 4.1.1 UC-0101 – Create Documents through the PPF

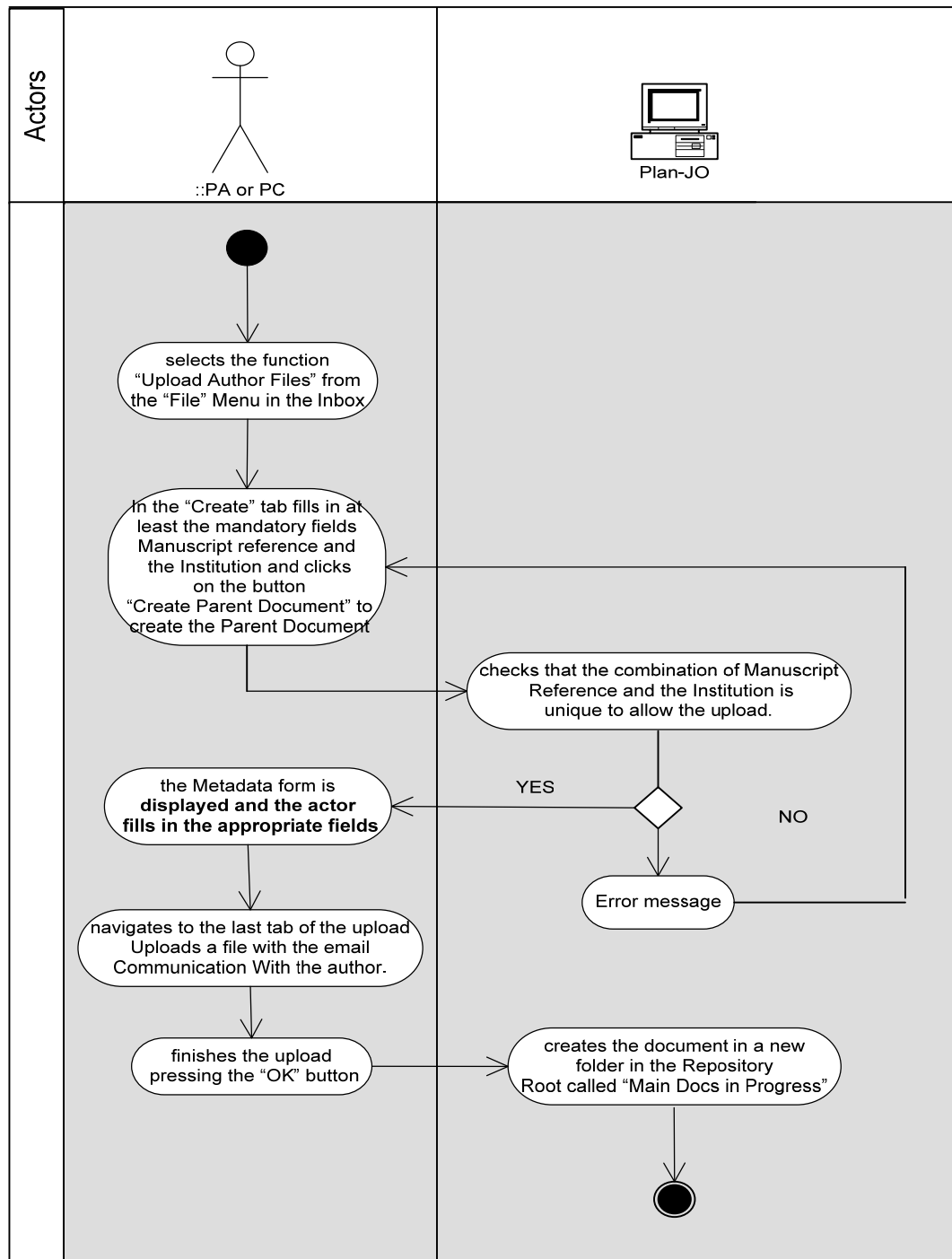


**Figure 16: Activities for Create Documents through the PPF**

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#### 4.1.2 UC-0102– Create Parent Document

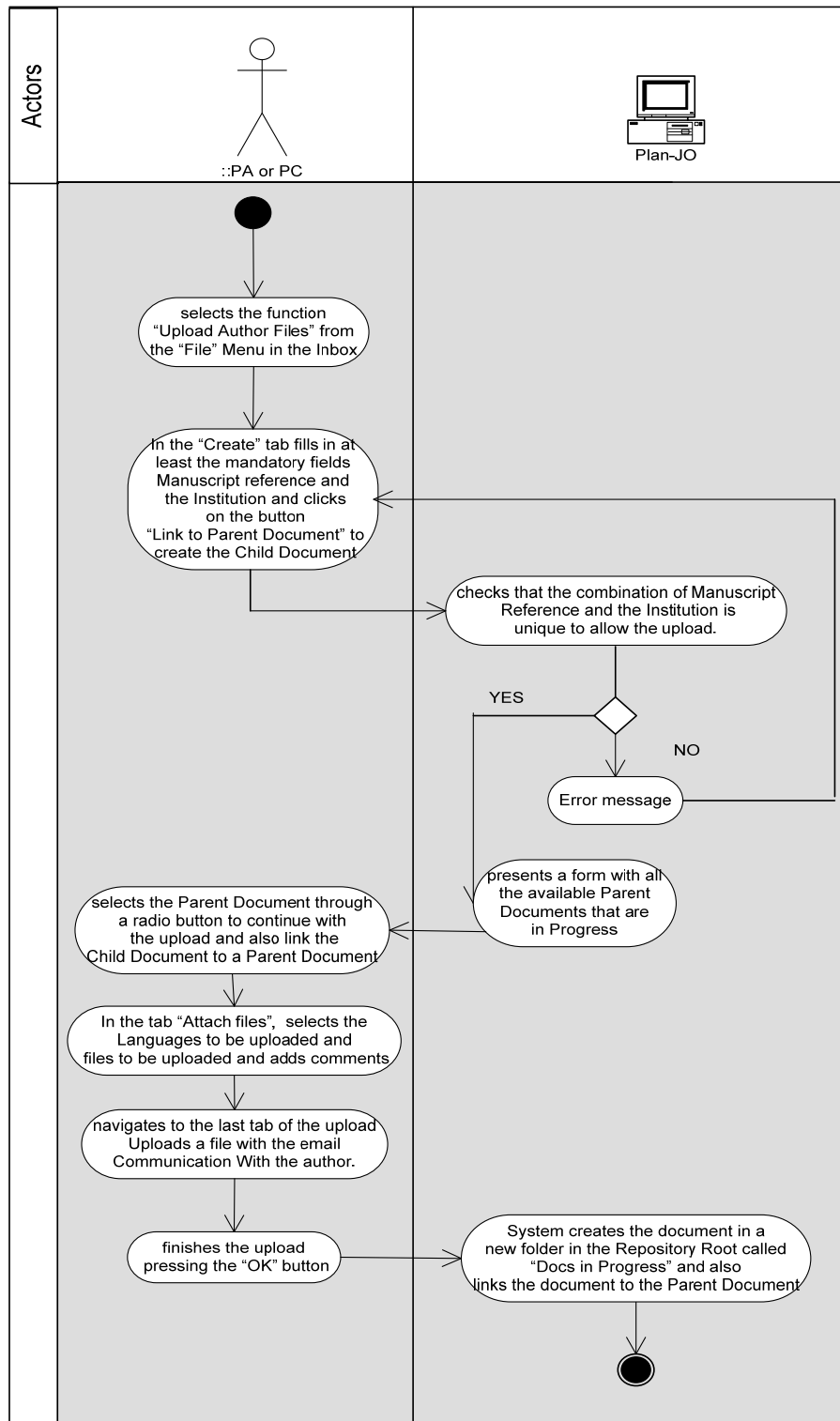


**Figure 17: Activities for Create Parent Document**

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#### 4.1.3 UC-0103 – Upload Child Document



**Figure 18: Activities for Upload Child Document**

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#### 4.1.4 UC-0104 – Dispatch Manuscripts to Printer – Child Document

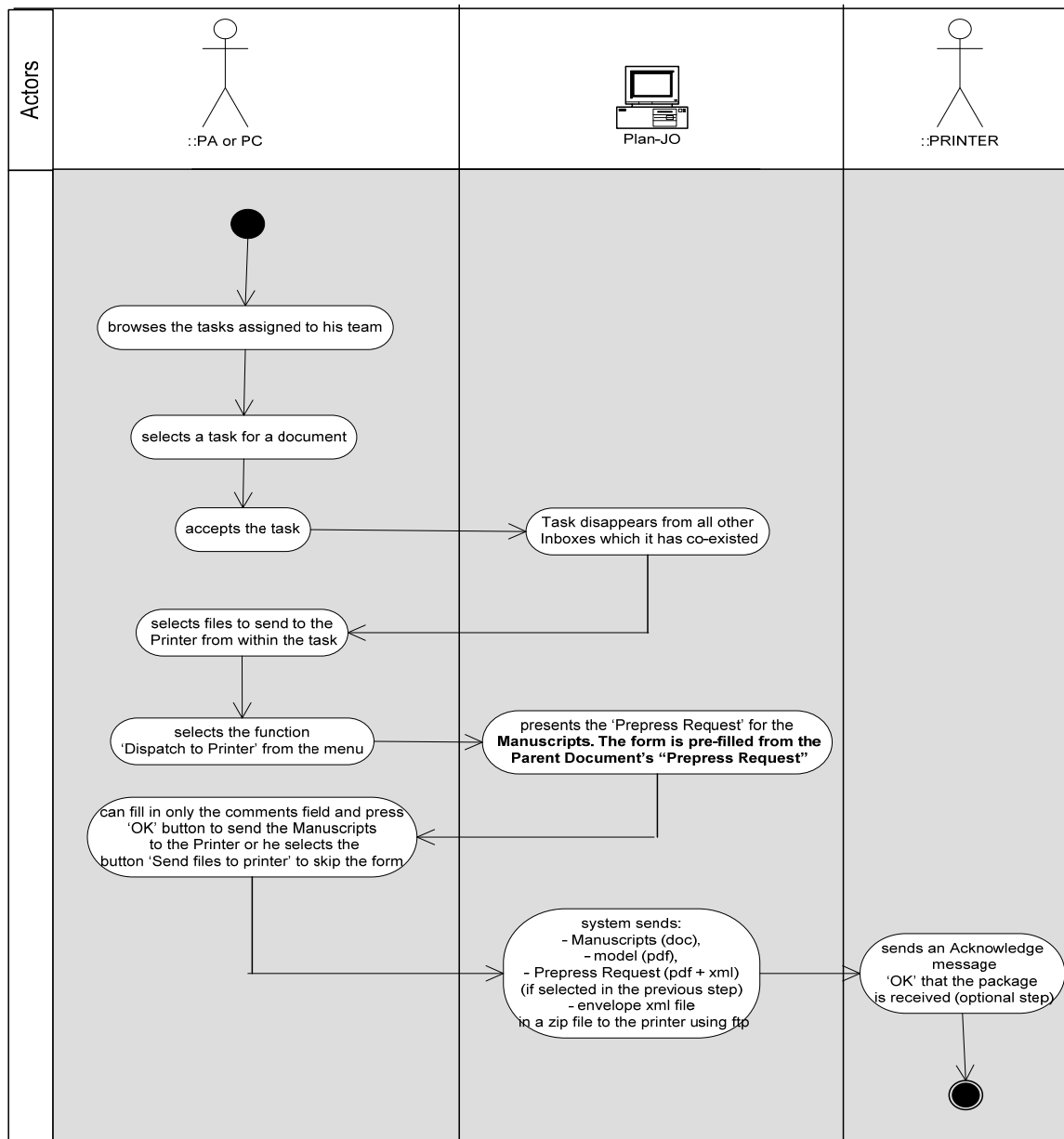


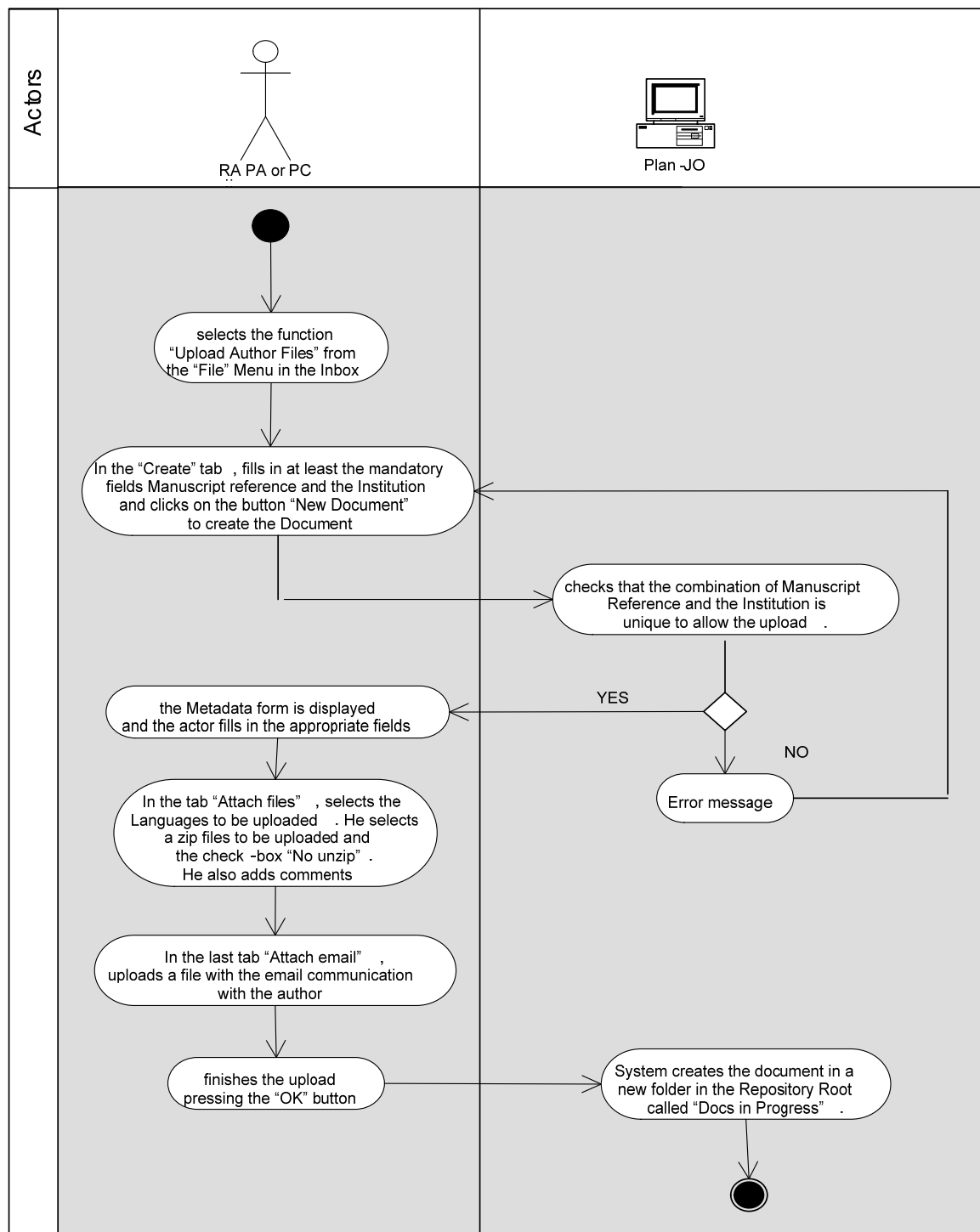
Figure 19: Activities for Dispatch Manuscripts to Printer – Child Document

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## 4.2 Reception Agent, Production Agent

### 4.2.1 UC-0201 – Upload Author files without unzip



**Figure 20: Activities for Upload Author files without unzip**

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## 5 Reports

The PLAN-JO system provides the users various reporting features enabling them to monitor the production process, delays and generate statistics.

All reports run from the Documentum WebTop under the menu name Reports. Different users have access to different reports based on their relative permissions and access rights.

The following table represents a list of the Reports, which have been delivered in the previous release of PLAN-JO and will be affected by the current analysis.

Actor	Use Case
Author	RP-0101 – List of documents
	RP-0102 – List of uploads
Reception Agent	RP-0201 – List of Docs in Progress not attached to OJ
Production Agent / Collator	RP-0301 – List of documents - overview
	RP-0302 – Document History
	RP-0303 – List of Regulations / Decisions
	RP-0304 – List of Documents in Progress not attached to OJ
Production Coordinator	RP-0401 – Manuscript pages per institution by date/period report
	RP-0402 – Manuscript pages per institution by date/periodand LV
	RP-0403 – Manuscript pages per institution by date/period MT and GA
	RP-0404 – List of Uploaded manuscript LVs not sent to printer per institution by date/period
	RP-0405 – Number of Files sent to printers
	RP-0406 – Number of Manuscript pages prior-read by OPOCE/Printers
	RP-0407 – Number of Documents per institution by date/period
	RP-0408 – Number of Documents with DEMED status other than VALID
	RP-0409 – Documents uploaded by group(Author, Reception team, PA group)
Reception Coordinator	<none>
Proofreader Coordinator	<none>
Proofreader	<none>

**Table 2: List of Reports affected by the Analysis**

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## **5.1 Author Reports**

### **5.1.1 RP-0101 – List of documents**

Because authors are not familiar with parent and child documents, this report will display only the regular and the parent documents. The child documents will be excluded from this report.

### **5.1.2 RP-0102 – List of uploads**

The Parent documents will be excluded from this report as the report shows the actual uploads that are applicable to the Child document level only. Thus, only the Regular and Child documents will be included to this report.

## **5.2 Reception Agent Reports**

### **5.2.1 RP-0201 – List of Documents in Progress not Attached to OJ**

A new criterion will be added in the Criteria form. In addition, a new column will be added in the Search results to show the information. The new criterion will be named “Documents” and will be a radio button with the following options:

- All: To search to all the documents. This will be the default value.
- Parent: To search to Parent Documents only.
- Regular: To exclude the Parent Documents from the search.

The child documents will be excluded from this report as these functions are applicable to the Parent document level only.

## **5.3 Production Agent Reports**

### **5.3.1 RP-0301 – List of documents - overview**

The Parent documents will be excluded from this report as the functions shown to this report are applicable to the Child document level only. Parent documents do not have workflows. In order for the PA to distinguish regular from child documents, a new column named “Parent doc. Ref.” will be added to this report. This column will display the document reference of the parent document for child documents, and will be empty for regular documents.

### **5.3.2 RP-0302 – Document History**

Same as RP-0301 – List of Documents - overview.

### **5.3.3 RP-0303 – List of Regulations / Decisions**

Same as RP-0201 – List of Documents in Progress not Attached to OJ.

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	<b>FUNCTIONAL ANALYSIS AND DESIGN – NEW DOCUMENTS RELEASE 3</b>	<b>Project / Subproject:</b> PLAN-JO No. 10030 / R3
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**5.3.4 RP-0304 – List of Documents in Progress not attached to OJ**

Same as RP-0201 – List of Documents in Progress not Attached to OJ.

**5.4 Production Coordinator Reports**

**5.4.1 RP-0401 – Manuscript pages per institution by date/period report**

The child documents will be excluded from this report as the required information is kept in Parent document level only.

**5.4.2 RP-0402 – Manuscript pages per institution by date/period and LV**

Same as RP-0401 – Manuscript pages per institution by date/period report.

**5.4.3 RP-0403 – Manuscript pages per institution by date/period MT and GA**

Same as RP-0401 – Manuscript pages per institution by date/period report.

**5.4.4 RP-0404 – List of Uploaded manuscript LVs not sent to printer per institution by date/period**

Same as RP-0301 – List of Documents - overview.

**5.4.5 RP-0405 – Number of Files sent to printers**

Same as RP-0301 – List of Documents - overview.

**5.4.6 RP-0406 – Number of Manuscript pages prior-read by OPOCE/Printers**

Same as RP-0301 – List of Documents - overview.

**5.4.7 RP-0407 – Number of Documents per institution by date/period**

Same as RP-0401 – Manuscript pages per institution by date/period report.

**5.4.8 RP-0408 – Number of Documents with DEMED status other than VALID**

Same as RP-0401 – Manuscript pages per institution by date/period report.

**5.4.9 RP-0409 – Documents uploaded by group (Author, Reception team, PA group)**

Same as RP-0401 – Manuscript pages per institution by date/period report.

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