

Functionality is core to the publishing solution selection process.

By Judy Lilley MIP3. Pro tem. Publications Solutions - March 2007

Choice - means the ability to select from a variety of possibilities.

We appreciate that there are various stages in the selection process, but how can a business ensure that any software, hardware or system is the best fit. This is where the role of a Requirements Document becomes so critical. It is this document that captures the publishing and production needs to meet the existing and future business strategies. Sometimes called a 'wish list' containing the essential and 'like to have' criteria a prospective software or system must deliver.

The document is a tool to be used for any proposed business change, whether being implemented by the business or externally for the business. In essence, this document is the script and like any film or play there must be continuity through to the final curtain.

You set the scene then look to find the actors to fill the parts!

How the requirements are delivered is not important at this stage – only what is needed.

So, you may start with the need to replace an existing system or to deliver data to mobile phones. To look for providers before finalising the requirements will only give a view of the current market offerings but it will not provide the necessary information to make a selection. Numerous implementations fail due to the requirements not being fully documented, because too little time was allocated to the task. Select in haste and you definitely will NOT - repent at leisure!

Having short-listed or even selected the provider, the next stage is the

Functional Specification.

Working through the AGREED requirements document, the criteria can be allocated to the functions that the solution can deliver.

For example:

- Indexing – this could be a simple product code to page list function or a complex multi-level such as manufacturer, brand, product name and generic term(s) to page number.
- Pricing – could be basic product code and price line or more complicated like price bands based on volume, discounted promotional prices or currency versions.

So, a solution may meet the various functions needed - but how extensive are these?

If only basic then can the more complex requirement be developed and if so what will be the cost and timeframe? In which case perhaps another solution would have been a better fit, particularly when any additional costs are included.

The other factor to consider is the structure of the data to be used or accessed. How will the software or system interrogate and select relevant data sets for use in the build whether for paper or e-channels. If data is held at Publication level how is the relationship between products handled across various editions, likewise if held at product group or product level. This then leads to how efficiently the data can be managed to maintain accuracy of output.

The software or system price has to be a key factor in the decision making process, but additional costs can impact not just on the justification but also on the installation timeframe so affecting the ROI.

The degree and depth of functionality will differ from solution to solution having been driven by the requirements of that particular providers' client base. Hence why there are sectors that have a tendency to use one solution more than any other, such as electronics, stationery and travel industries.

To illustrate the range of functionality, let's look at a selection of 10 UK catalogue

Publishing Solutions.

As space is limited, the selection of solutions has been based on a mix of established models, different types and price to provide a broad view. No

preference is implied by this choice and there are a number of other UK solutions available that include web2print, data hubs and hosted systems. The key system functions will differ between solutions from basic to varying degrees of complexity. Hence, why it is crucial to the selection process to know what level of system functionality is currently required and may be needed in the future. (see comparison chart)

System Functionality

- Auto-pagination: pages built 'on the fly', with data populating the pages in the correct order - in one continuous flow. It is preferable to ensure all the data is ready to publish before running the page build, otherwise any amendments or product changes will require a total rebuild. This can be problematic if any manual input has been done after the first build like adjusting copy overruns or repositioning fillers, as these will have to be actioned again after the rebuild. The solutions will build all pages or enable page builds by section or group of pages; it really depends on the production workflow.
- Design Led PMU: conventional page build where the designer imports/drag & drops the data into the page or spread then works on each element until the layout is finalised. The level of automation will differ between solutions.
- Auto-pricing: basically the solution imports a price file and runs a price merge routine against each order code and drops in the relevant price(s) and currency symbol as required. The price could appear in a table or price flash and certain rules may need to be applied such as discounted % or amount. The complexity and flexibility will depend on the variety of pricing versions/elements a solution can provide.

A Selection of 10 UK Publishing Systems 07 - (other solutions are available)

Name	Xchange Id	Catalog Database	LinkUP Enterprise	EasyCatalog	Adm	Campaign	Matrix CMS	Catalog'nTime	AgilityCMS	STEP
Type	Data Link/Filter	Database	MC Research	65-bit Data Link/Filter	Adm Software N.V	AD International	Matrix Software	Leckside Software	Phidar Graphics	Silbo Catalog
requirements			Data Link/Filter	Enterprise	Enterprise	Database	Database	Database	Enterprise	Enterprise
Cross Platform Databases	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Oracle/SQL		4D, flat files	ODBC, flat files	Any ODBC, flat files	✓ (Mac print client) SQL 2000/2005	SAP PrimeBase	4D	4D + MS .net	Oracle/SQL Server	Oracle
MacOSX		MySQL/ODBC	MacOSX NT, XP	MacOSX	MacOSX, Winat	MacOSX	Mac & OS	MacOSX	MacOSX	MacOSX
Windows 2000, XP		Windows 2000+	Windows95, 2000	Windows	Windows	Windows 2000	XP, Vista	Windows XP	Windows	Windows 03
Design Software	QuarkXpress/6 or later	QuarkXpress, InDesign, Framemaker	QuarkXpress V6&7	InDesign CS/CS2	InDesign	QuarkXpress, InDesign	QuarkXpress, InDesign	QuarkXpress V4-7, InDesign, CS2	QuarkXpress, InDesign	QuarkXpress, InDesign, Framemaker
7 Functions										
Auto-pagination	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
Design Led PMU	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Auto-pricing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cross Reference	✓	X	✓	✓	✓	✓	✓	✓	✓	✓
Indexing	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
Integral Spellchecker	X	✓	X	X	X	optional	✓	✓	✓	✓
Language support	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Browser Interface	✓	X	X	X	X	✓	✓	✓	✓	✓
Whiteboard	X	X	X	X	X	✓	✓	✓	✓	✓
Import/Export	✓	✓	Autodoc Version only	✓	✓	✓	✓	✓	✓	✓
Table Creator	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Data Classification	X	X	X	X	X	✓	✓	✓	✓	✓
Free text search	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
directional write back	X	✓	✓	✓	✓	✓	✓	✓	✓	optional
Scheduling Tool	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
Workflow	X	X	X	X	X	✓	✓	✓	✓	✓
Digital Asset Management	X	X	X	X	X	optional	✓	✓	✓	✓
site data management	X	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mail/e-mail merge	X	✓	✓	✓	✓	X	X	X	X	X
Web Publishing	XML feed	✓	X	XML feed	✓	✓	XML feed	✓	✓	✓
Price from*:	1 user: >£695.00	1 user: >£1995.00	1 user: >£2495.00	1 user: >£800.00	5 user: >£15,000	>£30,000	>£20,000	>£35,000	5 user: >£50,000	On application

* depends on the system size - the prices quoted are examples of entry level and are for guide purposes only

- **Cross Reference:** when a link to another product or copy block is needed i.e. 'See page 10 for refills' though this is also an 'Up-sell' mechanism. Another example would be a recycling symbol with a reference to the policy page. A 'flag' is inserted that links to the other product(s) so that when the publication is finished a routine can be run to drop in the relevant page number(s).
- **Indexing:** as previously mentioned this could be a simple product code listing through to a complex multi-level, multi-styled index.
- **Integral Spellchecker:** some providers developed this so that copy can be checked when either input/output rather than rely on the spell-check function of the DTP software. This is particularly useful to support multi-channel outputs.
- **Language support:** where the solution supports the creation of language versions generally via remote access through a translator interface linked to the master document. The function may support all languages including complex ones like Chinese or Hebrew. Or, it may only feed the translated text through to layer in Quark Passport for example.
- **Browser Interface:** where access to the data is via specific browsers such as Safari or Internet Explorer. This enables the user to access and view various data aspects such as language translations, input and check copy, view page PDF's, manage and maintain core data, upload data and images. Solutions with this functionality will provide different levels of access dependant on the complexity of the requirement and solution.
- **Whiteboard:** a function that enables users system access to select specific elements and place them onto a page or spread structure. The elements can be freely moved around and was designed for product managers /merchandisers to pre-build (not design) pages to check product listings and

density. This function has to retain the link to the data so that when the page is forwarded to the studio the elements are attached ready for page make-up.

- **Import/Export:** a rather important function when handling data. What formats/data structures can be supported, when can this happen and what routines are used – complex and /or basic operations. Text is easier to handle because the data packets are small whereas images will be different sizes, formats and resolutions. So, there may be time implications associated with the import/export routines. There may be a conversion function that creates duplicate images at other resolutions i.e. a tiff file is uploaded and a 72dpi jpeg file is automatically created.
- **Table Creator:** these can vary considerably between solutions and is dependant on the complexity required. Travel brochures are known to have detailed tables that can be large in size, and use colour and tints to break-up the grid to improve legibility. The content can be fluid so the cells need to be flexible and adapt to the changes for either copy or images. There may be a need to build comparative tables that import specific data dynamically into the table. Or, there may be no need for the solution to build tables at all but use the DTP software to provide the structure with the solution supplying the data.
- **Data Classification:** a subject in its own right! Basically, how data is structured to enable a solution to configure data output for the required channel. The 'classic structure' (or taxonomy) is generally a hierarchical structure, displaying parent-child relationships i.e. like the tree structure in Windows. So, the structure is critical in providing an efficient yet effective publishing process. The more channels involved the more complex (or granular) the structure may need to be.
- **Free text search:** is a technique for searching a computer-stored document or database; (sometimes called a full text search), rather like a search and

find routine. Every word in every stored element is checked to match the users search criteria for view purposes or to build a data feed for example. This can be used in place of a granular data structure but it all depends on the solution.

- **Bi-directional Write Back:** is where copy amends to a page are made after the page build and can be written back to the database ensuring core data accuracy from the page. Or, the database can be updated and the page refreshed to include the change. This is very useful for businesses that have to make changes right through to print/output.

- **Scheduling Tool:** tends to be date and/or task driven such as creating workstation 'To Do Lists' or events like importing data, running a script, or retrieving emails.

- **Workflow:** the movement of documents and/or tasks through various operations to create a work process. Each operation is made up of procedures together this forms a tracking mechanism to show the progress of the elements and pages through to output. Generally solutions provide a basic form of workflow at page level through specific stages to track production. This may be enhanced with the ability to run reports against the usage of data and user interaction. However, this is still the main publishing solution weakness and most production teams will use off-line tracking systems to monitor progress. This may not be the case for much longer as new technology will integrate and interact with the data sources and user workstations to automate workflow management.

- **DAM: Digital Asset Management** consists of routines and decisions around data asset (like images, documents, videos, presentations and music) import, labelling, cataloguing, storage and retrieval/output. In essence, it is a 'data bucket' that can be linked to a product information data source to feed publishing solution through to channel output.

- Remote data management: where users have direct access to the data so as to manage, manipulate, update, monitor the data. The extent of access can be controlled based on the user role, though generally this access will be via a browser interface as previously described.
- Mail/e-mail merge: providing integration with MS Office and e-mailing software such as Outlook so that users can communicate from within the solution rather than have to work in separate programmes.
- Web Publishing: some solutions can publish directly via a web interface either dynamically or with periodic data feeds. Others just export data in XML or similar. The route can differ in complexity and in data structure dependant on how the data is held and the data feed schema.

One other important point to be aware of is the version of design software a solution supports. There can be implications, quite serious in some cases, when new versions of QuarkXpress or an Operating System for example, are released. In that the publishing solution in use may need to create a new version to remain compatible. If this development takes too long then the software or OS may be dropped and unsupported by the provider and further copies may become unavailable. So, functionality is a 'pick and mix' scenario and it all comes back to choice and finding the solution that best fits your current and future publishing strategy.

Biography

Judy Lilley MIP3 - established Pro tem. Publications Solutions to offer an independent resource assisting businesses develop multi-channel production and DM techniques. Specialising in catalogue production system/workflow selection, the implementation of new technologies, change management, and publication structures. Copywriting and paper or digital channel production project management.

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