Peterson's improves its publishing process with Microsoft Word and Intelligent Content technology

Ictect Case Study Series

Summary

Country or Region: United States

Industry: Information

Customer Profile
Peterson's, a Nelnet company, is a leading global provider of integrated information solutions to business and professional customers. Peterson's publications are used by more than 100 million consumers searching for information related to higher education.

Business Situation
Peterson's needed a streamlined process to efficiently publish documents, and collaborate with its customers in the revision process. The process was needed for about 3,000 documents modified annually.

Solution
Microsoft Word provided the foundation for all stakeholders: Peterson's sales, digital development, editorial, and composition departments, and its clients. Intelligent content architecture, involving Microsoft Word and icPlugIn provided the solution for the editorial team.

Benefits
Peterson's estimated 25% productivity improvement within the first year with a cost-effective solution that did not require major changes in the company's IT platform.

Technology Enablers
- Microsoft Word
- Intelligent Content Plug-In (icPlugIn)
- XyEnterprise XPP

New Editorial Solution without a new IT System

This case study is intended to provide the reader with an overview of the client communication, content collection, content editing, and publishing challenges faced by Peterson's, a Nelnet company.

In addition, this report will summarize the company's experience with the productivity-enhancing effects that the Peterson's Editorial Toolbox, based on the Intelligent Content Plug-In, has provided throughout the Peterson's organization.

Customer Profile

Peterson's, a Nelnet company, is a leading global provider of integrated information solutions to business and professional customers. Peterson's publications are used by more than 100 million consumers searching for information related to higher education. The company's Web site, www.petersons.com, is the premier portal for information regarding colleges, universities, graduate programs, test preparation, scholarship programs, and financial aid.

Peterson's product portfolio includes more than forty data-rich reference directories available in print, CD- ROM, and Web-based formats. Their products impact an estimated 105 million consumers annually. Content contributed by more than 5,000 institutions is received, edited and used to create in-depth descriptions (IDDs) of each institution featured in Peterson's reference guides. Add to that the need to include more than 2,000 institution-specific announcements, institutional crests and logos, and 10,000 photographs, all within tight publication deadlines, and one can appreciate the scope and scale of the project coordination and management challenges faced by Peterson's.

Peterson's has improved its internal ability to create, edit, and publish the IDDs in their reference guides, in both print and electronic formats, thanks to a novel software platform, based on the Ictect's intelligent content technology. The software purchased and utilized by Peterson's is a custom-tailored form of icPlugIn software. The software, Peterson's Editorial Toolbox (PET), is used by the firm's copy editors, production editors, and composition editors.

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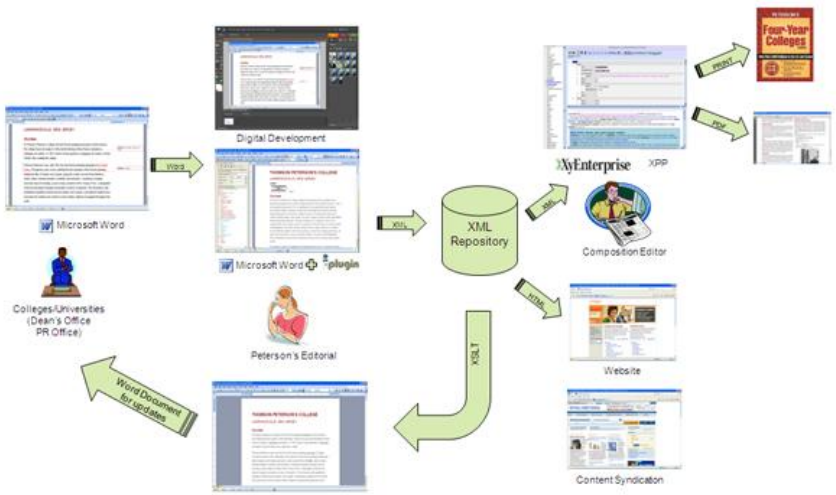
Business Situation

Peterson's reference guides are utilized by thousands of educational institutions and students in North America and worldwide. Founded on the production of content-rich printed reference guides, technological evolutions and end-user preferences have led to the addition of CD-ROM based and Web-based versions of each of the forty- plus reference guides produced by the company. Reference guides are updated and released annually, with a select few requiring revisions be made, published, and distributed in as little as six months.

The scope of the production challenge involves updating the content provided by contributing institutions, including a large volume of institution-specific data in an organized form. Additionally, the production staff at Peterson's must accurately and efficiently incorporate more than 5,000 institutional crests and logos, 2,100 time-sensitive institution-specific announcements, and nearly 10,000 photographs. Before starting this project, Peterson's had used an editing software which was nearly a decade old, was no longer supported by its vendor, and was coding intensive with codes and content not distinct on screen. Content provided by the institutions required time-consuming and error-prone manual editing by Peterson's staff. Proofreading and other quality control processes were labor and time intensive. The company experimented with various approaches, including exchanging text information with their clients by creating a PDF file and manually modifying the document based on a printed copy or fax. These approaches turned out to be too labor intensive and cumbersome to be practical.

While Peterson's recognized the global acceptance of XML, the transition toward XML-based content proved to be yet another challenge. The majority of content held by Peterson's was in proprietary and legacy formats (XSF format from XyVision or in a "Signature" format). Peterson's project managers were faced with a daunting dilemma: locate and utilize an offshore firm to manually code their vast pool of legacy content to an XML format, and/or to purchase and utilize an XML editing software system. Both of these options created additional challenges for Peterson's. An offshore content coding service would save time for the company, but was not necessarily inexpensive. In addition, the concern for accuracy and the need to invest significant amounts of time and money to audit and approve the content before it could be utilized in the production of their reference guides further decreased the true ROI of this option. The purchase and use of an XML editing system would be beneficial for the Peterson's editing and production staff, but would not necessarily meet the institutional client's needs, which predominantly provide information in a Microsoft Word rich text format, not in XML.

Intelligent Content Architecture



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Business Solution – Microsoft Word and icPlugIn based editing environment

The company selected the icPlug-In for Microsoft Word to create a user friendly environment for editors. The icPlugIn software uses a proprietary and patented process of embedding XML codes into Microsoft Word. The use of XML within Microsoft Word significantly improved the internal and external communications, editing, and production processes. At the same time, it provided a user-friendly communication and content collection tool for the editors to use in processing content contributed by institutions to the Peterson's reference guides.

Peterson's Editorial Toolbox (PET) has allowed the company to effectively integrate the needs of its information providers, as well as the needs of the editing, data management, and composition departments within the publishing operation. PET has provided this ability for existing legacy content as well as for new content received from institutions.

The information providers are now able to contribute, review, and edit their specific content with ease, on-screen, utilizing a common text editing tool, Microsoft Word. The XML-based data coding remains hidden to the content contributors. However, once the Microsoft Word document is received from the institution, the PET software converts the key content components from each institution to an XML-format, making it possible to "create once, yet reuse many times." The use of XML has significantly reduced the amount of time required to edit and publish information for the IDD products.

In addition to the improved productivity and quality control benefits, Peterson's has found this software provides a supplemental benefit in regard to the reduction in time needed to train new and temporary copy editors. This is due to the seamless, Microsoft Word-based functioning of the software.

Peterson's Editorial Toolbox

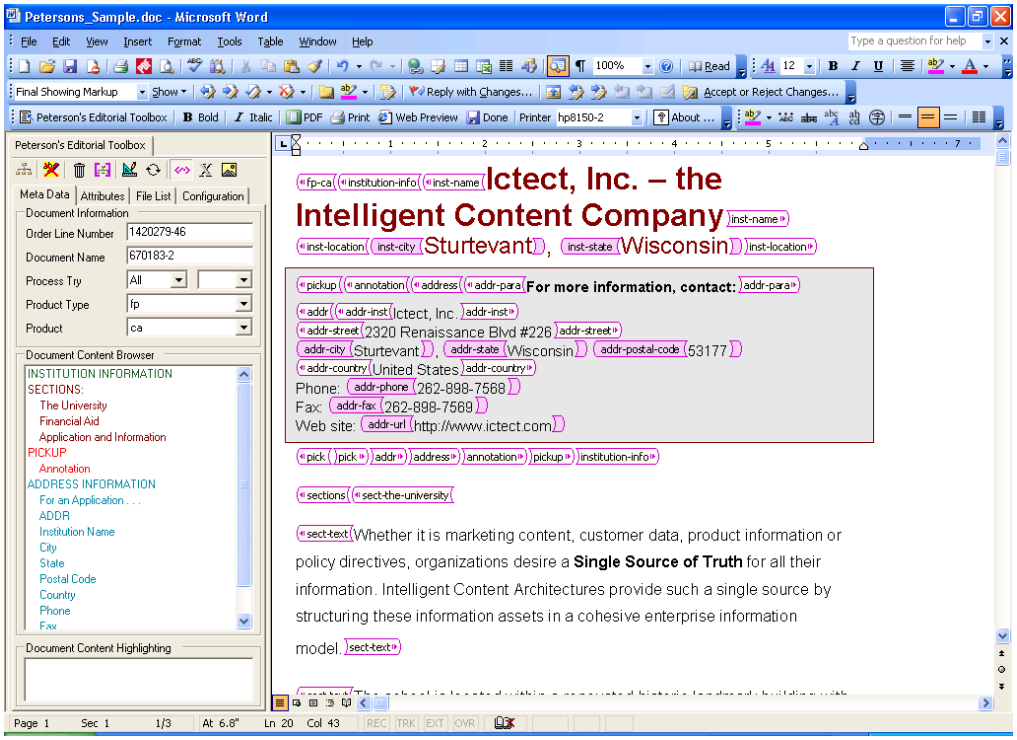

Figure: PET, seamlessly integrated within Word
(Document shown with XML tags visible)

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Business Benefits

Editorial Staff

- Provides user-friendly, Microsoft Word–based data contribution and editing tool, with embedded XML software to enhance publisher's data management, editing, formatting and composition capabilities.
- Documents representing more than one generation of data from each client can be compared on-screen, allowing for yet another cross check in Peterson's quality control process.

Sales Staff

- Ability to respond to clients' requests for an electronic IDD, the ability to easily edit IDD, and use of a common editor (Microsoft Word).
- Opportunity to promote an exciting new capability to clients.

Digital Development Staff

Ability to save costs by:

- having a structured, valid XML document,
- using standardized (Unicode) special characters, and
- not requiring any special programming to convert Word to XML

Enterprise Systems Staff

Ability to save costs by:

- eliminating an unsupported product that is difficult to install and support,
- standardizing on Microsoft Word throughout the company, and
- not requiring new hardware
-

Composition Staff

Simplified IDD composition process which:

- provides a structured, valid XML document,
- provides standardized special characters, and
- reduces the need for composition intervention with copy editors

Peterson's

- Improved Peterson's reference guide publishing productivity by an estimated 25% in the first year.
- Improved efficiency and quality control of the publication production process throughout the organization.
- Text and data changes can be easily tracked and verified by Peterson's production staff, as well as by their clients.

For More Information

For more information about Ictect products and services, call 262-898-7568 or visit the Web site at: **www.ictect.com**

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