



WHITE PAPER:

Take control of your content

Automation for print, online and mobile



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Take control of your content and DO MORE

Many organizations implement a Content Management System (CMS) or an Automated Publishing System (APS) with some vague concept of content reuse and without a clear view of what they want to achieve.

To best leverage publishing automation and content management tools, it's helpful to understand your content and how you use it, articulate clear goals on what you want to achieve with your content, and complete a content analysis. As part of this process, it is especially important to develop a semantic, structured approach to content development, including the creation of style naming conventions, style guides, and style templates.

Style guides and templates provide both short and long term benefits to organizations that are creating documents with somewhat repeatable content types—from operations manuals to financial reports to books. Style guides make documents more consistent and easier to read, and provide for efficient content reuse even in a non-automated environment.

Style guides are also critical for the proper implementation of automated publishing systems and content management systems. In fact, without a style guide, effective implementations of such systems are almost impossible.

This paper offers a high-level practical guide to analyzing your content, deciding what you want to do with it, developing style naming conventions, and developing editorial style guides, design style guides, and style templates.

Once you get to that stage, you can then consider how content management systems, automation, and XML might fit into your publishing processes.

Goal setting

One of Stephen Covey's 7 Habits of Highly Effective People is "start with the end in mind", and this is certainly true if you're looking to improve your overall content development and management processes.

The best way to begin is to develop a content strategy, which will help you gain control of your processes, workflows and content, and to define the outcomes you want to achieve by implementing your strategy.

- Do you want to improve quality? You're probably already producing high quality materials, but are there other ways that you can improve the quality of the experience for your audience? If you had more time and money, how you would make the experience better for your audience?
- Do you want to reduce production time? Increasing content management efficiency could allow you to spend more time on crafting the content itself, or preparing materials to reach your customers faster.
- Do you want to reduce costs? (Doesn't everyone?)
- Do you want to offer more? By making your content development process more efficient, you may wind up with easier paths to additional content offerings for your audiences—new formats, new ways of distribution, and so on.

Once you've set some high-level goals and have the end in mind, you're ready to start looking at your content. However, be prepared to revisit and refine your goals and objectives regularly during the development of your strategy—as you gain a clearer understanding of your content, you will be better placed to define realistic targets and outcomes.

Content analysis

Content analysis is the critical first step in taking control of your content development process. To get where you're going, you need to understand where you are today.

What content do you have?

It's important to think about everything you produce and what goes into all of it, and also what you'd like to produce in the future in order to work towards the goals you've defined.

- Where is your content coming from? Who's creating it? Are you writing it in-house, or do you have freelancers? How much control do you have over the authors?
- Is the content always new? Is it or can it be reused from previous versions of your publications?
- In what formats is your content? Is it in Microsoft Word, Adobe InDesign, PDF, databases or even on paper? Is it a mix of these?
- Who is your audience? Are they your customers? Are they other organizations, or government agencies, or regulatory agencies? Are you dealing with different countries or regions with different language requirements? Do the regions where you're publishing have accessibility requirements such as Section 508 or WCAG 2.0 AA compliance?
- What formats do your audiences want? Are they asking for print-only, or do they want electronic formats such as EPUB and PDF? Do they want your content in XML, do they want it in accessible formats such as DAISY, do they want to access it online, or do they want it as a mobile app?
- What additional types of content might you need to produce to best take advantage of the formats your audiences want? For example, if you're planning to create an electronic version of a publication, what additional material will you need to produce in order to make it compelling and useful? Interactive features? Videos?
- What is your current workflow for publishing, including authoring, editing, review and composition?
- How does your current workflow manage outputting to multiple media? Does it add significant time to the process? How do you deal with changes to content after production?

It's helpful to create a flowchart or diagram to show the path of your content from creation to distribution. This way you can see how much material you have, and what you do with it. Seeing it all in one place can help uncover possibilities for efficiencies or savings.

What do you want to do with your content?

Once you figure out what you have, you should think about what you want to do with it—apart from delivering it to your audiences, of course.

Organize

Sometimes just being able to organize all your stuff in a systematic, managed way is very beneficial. Do you want to be able to see everything you have at a glance? Do you want to know exactly where to look to find particular types of content?

Search

Do you want to be able to search through all your content in order to find and do something with it? Consider, for example, an image database that contains all your figure art. What kind of information would you need about each image to make searching for things easy and useful? The same type of thought process can be applied to all your other content to make searching easier.

Transform

Transforming content means converting existing content to another format, or another context for a different audience. For example, you might want to convert all your .EPS figure graphics to .JPG for web, or develop an interactive feature in EPUB with corresponding flat text and images for print.

Track

Tracking could refer to keeping track of different versions of your content, or literally tracking the content through the various steps of your workflow.

Report

Hand-in-hand with tracking is reporting. If you're tracking your content, you should also be able to run reports about it—where things are being used, what stage of the process they're in, who's working on it, and so on.

Reuse

Finally, do you want to be able to reuse the same content in different formats, different versions, or different contexts for different audiences? Would you like to offer customized or print-on-demand publications to your customers?

Granularity

The term 'granularity' is used often when talking about content management. It refers to the size of the things you're managing—the greater the granularity, the deeper the level of detail.

If you're managing content at a file level, it generally has a low level of granularity. An output file (such as a PDF) or a layout file (such as an InDesign file or formatted Word file) contains a whole bunch of objects including text and graphics and layout—at that file-by-file level, you have to deal with all the content within at once.

Text files are a little more granular. You might have a separate text file for each topic in a chapter, for example, and these can be recombined and mixed and matched to create different versions of a publication.

Examples of content with high granularity include data in its raw form—like the information stored in databases—and image files, which are basically self-contained content chunks that make sense on their own.

In the next section on optimizing your content, we'll demonstrate how to break down the content within a single document to an extremely granular level in order to analyze it and develop style naming conventions.

A high level of granularity increases your options for content reuse if you're looking to export the same dataset or 'chunks' of content into different versions of a publication or to a variety of output channels.

Smallest reusable chunk

One way to determine your level of granularity is to decide what the smallest reusable chunk (SRC) of content is. The size of the SRC will inform your content management strategy. Are you going to manage files, or things smaller than files, or both?

Attributes of a SRC include:

- It makes sense on its own;
- It can be put into another publication and still work semantically (if not visually).

A topic might be a SRC. For example, if you were developing a series of instruction manuals, you could mix and match topics into different manuals depending on the overall intent of each document.

Smaller pieces might work too, like warning text. How many times might a "wear eye protection" warning appear in all those manuals? Maybe it would be worth writing that text once, and simply referring to it in different contexts, so the warning text and an icon are exactly the same in every output.

It's easy to go overboard when thinking about this though, so consider the costs versus the benefits. Is it worth setting up a system so you don't have to type "wear eye protection" multiple times? Maybe, maybe not. If you follow the approach for optimizing your content in the next section, you'll be better prepared to make those decisions.

Optimizing your content: A structured, semantic approach

One of the goals of content analysis is to break out and organize all the pieces that go into your final publications in a highly granular way. Doing this will:

- Reveal patterns in how your content is put together—you can take advantage of these patterns to streamline certain aspects of content development, including identifying your SRC;
- Allow you to discover things about your content that you haven't noticed before—inconsistencies may be exposed and things might get a little uncomfortable (but it will be worth it!); and
- Help you develop style naming conventions, style guides and style templates to guide your team in developing content that is optimized to achieve the goals you've defined.

Break it down

To get started, a good approach is to organize your documents into types. Find samples of all the different publications in all their variations. Pick a cutoff, though; maybe the last major redesign, or last year's projects. Also choose good representatives for each type. You'll want a good mix of standard and more unique documents.

Once you have your representative set of samples, sit down and look at them. We sometimes become 'blind' to the stuff we work on every day—you know you're at that point when you can just glance at a page and know something's not right—so make sure you take a step back and really look at your content with fresh eyes.

Start breaking down the components into chunks, from larger to smaller: book level (front matter, table of contents, chapters); chapter level (opener, body, closer); sub-chapter level (figures, tables, boxes); block level (heads, paragraphs, captions); inline level (special formatting within paragraphs); and so on.

Format vs semantic

There is a difference between what something looks like and what it actually is. Formatting is related to the presentation of the content, while the semantic meaning has conceptually to do with what the content is.

In this example, 23-955b has a format of 'red and bold'. Semantically, 23-955b is a part number.

Replace with part 23-955b.

Formatting can change depending on context, but the semantic meaning shouldn't. In a different setting, 23-955b might be black, or underlined, or flashing pink and purple. But it will always be a part number.

The idea of separating presentation from meaning is at the core of publishing automation, content reuse, and XML publishing. But it's also just a sensible way to describe your content. Designs change; meaning is (usually) forever.

As you analyze and 'chunk' your sample documents, identify the semantic components of each type of document. It helps to annotate the pages—one way to do this is by circling components. Categorize the components and then compare across your document types to determine similarities and differences.



In this simple print example, we've identified the following semantic chunks:

- Section or chapter head (red—top of page)
- Column head (red)
- Paragraph text (dark blue)
- Warning text (green)
- Warning head (light blue)
- Image reference (yellow)
- Image (brown)
- Footer (purple)
- Right or wrong (pink)

Making a list of all your components helps you see everything that you produce, and where and how it's used. These semantic chunks are what you'll need to consider when you're setting up systems for organizing, searching, transforming, tracking and reusing your content.

Since you've also named all the pieces in a way that separates their meaning from their presentation, you now have the nucleus of a style naming convention.

Style naming conventions

The benefits of a style naming convention include the ability to discuss your content using a common vocabulary within your organization, as well as with any outside people you might be working with. If you all agree on what a 'part number' is, then there will be less confusion, easier communication, and much more effective training and documentation for new people or outside vendors.

You also enable consistency between projects, so nobody has to learn a new convention every time they start a new project. This familiarity will eventually lead to cleaner manuscripts and quicker production times.

The style naming convention can be used by writers, designers, and anyone else who will be interacting with the content during the content development process.

Style names should be semantic, not format-based. However, sometimes italic is just italic and bold is just bold. You could have styles called "Emphasis" and "Emphasis Strong" to stay completely semantic, but that's up to you. In other words, don't drive yourself crazy.

Style names should be consistent across all your document types—a part number is a part number no matter what kind of document it's used in. But there's no need to go overboard on that either.

Keep your style names a reasonable length so you can differentiate between styles within the palettes of the tools you're using. "Manual_Chapter_Opener_Intro_Box_Warning_Head_Runin" would be difficult to work with in Microsoft Word or Adobe InDesign, for example. Abbreviations can be used to help with this,

but make sure you have a chart that spells out what all the abbreviations mean, otherwise it'll be just as confusing and difficult to work with, but in a different way.



In our example, we've decided to name our semantic chunks as follows:

- Section or chapter head: SectionHead
- Column head: Column Head
- Paragraph text: Para Text
- Warning text: Warning Text
- Warning head: Warning Head

It really is that simple! However, do be aware that full stops or spaces in style names can cause issues in some automated processes—if you want to go from EPUB to InDesign, for example—so you may choose to use underscores, CamelCase or hyphens to separate terms. Also avoid characters that you wouldn't use in a filename, such as apostrophes, quotes, ampersands, greater than or less than, and parentheses.

Style guides

There is a difference between editorial style guides and design style guides.

Editorial style guides provide guidelines for the way documents are written. They're not typically concerned with what the documents will look like when published.

Design style guides are a little different. They're meant for designers and compositors and define the formatting specifications for the document.

You can use a design style guide to build style templates in whatever platforms you're using to author and publish, which allows you and your team to practically—and consistently—apply the defined styles as an integral part of the publishing workflow.

Editorial style guides

Editorial style guides define the voice of your document. These are essentially the instructions you give writers and editors when you ask them to write and edit content. They indicate what types of content are allowed in the document, what order things go in, and other structural information. They can also specify your house style on how specific pieces of content are worded.

You might choose to introduce your semantic style naming convention at this stage in the process. However, it all depends on your workflow and what exactly you want the writers and editors to do when they're writing.

At some point before page production, the content should all be styled using your semantic style naming convention. The question is: when, and by whom? We're of the opinion that the sooner in the process the better, and the best person to say **how** a particular piece of content should be semantically defined is the person who's writing it in the first place.

Often, though, there's pushback—from the point of view of a writer, styling content 'isn't their job'. So it all depends on how you present it. If your writers are spending any time formatting their manuscript, either with Word's built-in styles, or codes in brackets, or notes, or just changing the fonts to differentiate between heads and running text, then you have an argument that it's just as easy to apply a Word style as it is to do all that. You can even make your semantic styles look the way they want their manuscript to look.

If your writers are handing you flat text files with no differentiation between content types or indication of what anything is, then you must have a process in place already that adds all that information to the content, so maybe that's where the semantic markup should happen.

It's really going to depend on how much time you want writers dealing with this, or if you'd prefer to let them do their thing, and then clean it up at a later stage. If you have a concise, intuitive, easy-to-use set of semantic styles, it's not unreasonable to think that your writers will be OK with using them.

Design style guides

Design style guides map the semantic styles back to specific formatting. This is where the presentation and meaning come back together for the particular publication type in question.

Because of this, you should create a design style guide for every publication type you produce. The web design won't usually match the print design, so you need to map the semantic content to each of them.



In our simple print example, the design style guide would define the following formatting for each semantic chunk:

- 'SectionHead': 18 pt Futura Heavy
- 'Column Head': 14 pt Arial Regular
- 'Para Text': 9 pt Arial Regular
- 'Warning Text': 9 pt Arial Regular
- 'Warning Head': 9 pt Arial Bold

...and so on.

Style templates

A style template is where all the information you've discovered about your content is put together so you can practically apply it.

After doing your content analysis, you should have a list of all the different content components you create. You can use your semantic naming convention to name all those components, and then use your design style guide to apply formatting to those components.

With all this information, you can build templates in whatever platform you're using to author and publish your content, which will allow you to consistently apply those styles across your publications. This is where paragraph and character styles come from, as well as larger structures in your publications, like InDesign library items and master pages. If you're writing and publishing from one platform, then you'll just need one template for each output type. If you author in one platform and publish in another, you'll need templates for both.

Ready to take it further?

If you get to this point and stop, you've already gone a long way toward getting your content under control, and improving your editorial and production processes. However, if you'd like to take your content management strategy further, you're now at a point where you can consider how content management systems, automation, and XML might fit into your publishing process.

Content management

What type of content management system is right for you? Let's take a look at some of the broad classes of systems available, ranging from simple to complex, including file management, Digital Asset Management (DAM) systems, and Enterprise Content Management Systems (ECMS).

File management

The very simplest content management technique, which you're probably already doing, is getting your files and folders organized. Naming conventions help with this, as well as setting things up consistently from project to project and person to person. You can track workflow using spreadsheets, which can also generate reports if you set them up that way.

A simple way to use folders to implement a very basic workflow management system for book publishing is to set up the folders for a project on a server to match the table of contents for the book you're working on. Within each section folder you'd place live InDesign files, image files, and manuscript. You'd also create another folder called "Doc Lock".

If you needed to edit any of the files, you could copy them into Doc Lock, then copy them down to your local machine for editing. When you're done, you copy them back to Doc Lock, then move the files back into the section folder so somebody else could edit them.

It is very low tech, but very effective (provided everybody remembers to do it)! However, since there is no automatic enforcement of this by an ECMS, you could still have cases where two people are working on the same file at the same time, and somebody's work would get overwritten.

Digital asset management systems

One broad class of systems is Digital Asset Management (DAM) systems. These generally focus on file management and offer functionality such as file check in and check out, versioning, and the ability to add metadata.

Metadata is just additional information about the files or content you're managing. Your computer already puts some metadata on all your files, like creation and modified dates, file size and file type. Systems that let you add metadata usually let you define your own, so you can determine the kinds of information you want to add and how to use it.

Like pretty much everything else discussed in this paper, if you want to introduce metadata to your process, you'll need to figure out what you want to do, develop a naming convention, and implement a standard way of applying the information to your content.

Enterprise content management systems

The last broad class is Enterprise Content Management Systems (ECMS). These are the ones most people think of when they think of a CMS.

In addition to everything that a DAM system does, an ECMS often has workflow modules that let you automate some aspects of workflow management. For example, changing the status of a file could trigger an email to be sent to a certain group, and then a PDF version of the file could be sent to each group member's cloud-based storage folder.

An ECMS also has the capability to deal with content at a very granular level, making transformation, reuse, and automated publishing possible.

Which content management system?

If you do decide to start looking for a CMS, go online to learn more—a search for "choosing a CMS" or "choosing a DAM" will bring up lots of information and advice.

You're going to be inundated with lots of amazing features and technical details, but if you've followed the advice in this paper you'll have your house in order and the ability to say "this is what we have, and this is what we want to do with it".

This level of preparation allows you to cut through a lot of the nonsense and get right to the system or systems that will work best for you—or at least you'll have a better chance than if you didn't know what you have and what you want to do with it.

Automated publishing

There are several different kinds of automation that can be introduced to a publishing workflow, and you can do some of them or all of them, depending on your needs.

Content aggregation

Content aggregation is taking chunks of content and putting them together to make particular publications. Think of a website. You have a CMS in the background storing all the content, and what's delivered to the audience depends on what they click on. Information can be pulled from all over the CMS in order to deliver the content the user wants.

This same idea can work for print. You might pull together several different Word files and deliver them to be printed, or make PDFs that can be combined into one file.

Automated composition

Automated composition refers to actually automating the activity of laying out pages, whether for print or electronic delivery. Depending on the complexity of your designs, you may be able to achieve complete automation, or at least get the pages to a point that some additional hand work gets them into the shape that they need to be for consumption.

Transformation

Transformation means taking a content source and transforming it in some way to be suitable for a particular output channel. This could mean adding or suppressing content for a particular audience, or changing the format—like from print to EPUB.

Single-source publishing

Single-source publishing is where you literally have one source content file that can be run through the automation process to produce all the different outputs you need. That 'source of truth' is the single place where that content lives, so that's where you go to edit, and any changes there can be pushed to all the outputs so your content is always up-to-date and the same across all your publications and platforms.

Extensible Markup Language

XML (eXtensible Markup Language) is the programming language that underpins nearly all publishing workflows worldwide. It's often hidden behind the user-friendly interfaces we're used to—Microsoft Word, Adobe Creative Cloud, and so on—but it's there behind the scenes, making everything work.

An XML file is really just a type of text file—it doesn't do anything by itself. However, XML is incredibly powerful as it provides content with a semantic structure that has a high level of granularity. As mentioned previously, a semantic structure and a high level of granularity makes content easier to search, manipulate, reuse, share and transform.

To break down the acronym, "markup language" means that the text is comprised of your content (or data), as well as tags that say what the content is. Tags consist of the semantic meaning enclosed in angle brackets. For example, an XML title might look like this:

<title>Take control of your content and DO MORE</title>

Any XML system using that element knows that the text inside those two tags is a title.

"Extensible" means that you can define the tags yourself. However, there are many standardized sets of tags available that enable easy sharing and reuse of similar content types. These pre-defined tag sets are called XML schemas.

Standard XML schemas

DITA stands for Darwin Information Typing Architecture, and it's traditionally used for technical communication. It's topic-based in structure so, essentially, you divide your content up by topic, and map the topics together to create publications.

DocBook is a more traditional book-based structure, enabling you to divide your content into chapters and sections and so on.

JATS stands for Journal Article Tag Suite and was developed for tagging and archiving articles for the National Library of Medicine. It is now a NISO (National Information Standards Organization) standard and is used in other applications beyond journals.

There are many other XML schemas available or, again, you can make up your own structure that suits your content as you see fit.

Schemas also come in a range of 'languages', which include Document Type Definition (DTD), RELAX NG (RNG), and W3C XML Schema (XSD).

What can you do with XML?

There are all kinds of applications available that generate, read, and manipulate XML content. There are XML authoring tools, XML parsing and validation tools, XML transformation tools, and tools that convert XML into usable output formats.

If your workflow uses XML as its file type, you can take advantage of some features that might help with your content development.

Because XML files are just text with tags, they must be transformed to something else before an end user can use them. You can convert from XML to HTML to make a web page, for example, or XML to PDF using a number of different possible pathways.

XML can be validated against a schema, such as those mentioned above. The schemas define the rules that tell the system or application you're using what kind of XML you're dealing with. An XML validation tool knows which tags are allowed where, and if your content breaks any of these rules, you'll get a warning or error message. For example, if your schema says every topic must have exactly one title, and you have a content file that's missing a title, you'll get a warning that the title is missing.

An XML transformation tool can transform different tags to comply with different schemas. Let's say you have to submit some material to an industry group or government agency, and they require it in a specific XML format. If your content is in XML, you can easily transform it to comply with that other group's schema without having to manually touch the content itself. Since you're not copying and pasting, or fiddling with the content manually, errors are virtually eliminated from the process.

If your content is in XML, and you have an XML content management system, you can actually manage and manipulate content down to the tag level. So you could tag every word in a document and create a new document just by referring to the tags in the first document (not that you would want to). More realistically, you'd use it to pull larger content chunks, like the eye protection warning described earlier, to be reused in multiple publications and outputs.

What's next?

To summarize, there are several things that you can do now to get your organization ready for possible content management and automated publishing.

- Develop a content strategy;
- · Conduct a content analysis;
- Come up with a semantic style naming convention;
- Create editorial and design style guides and style templates, and start using them.

If you make it to that point, you'll have gone a long way towards getting your content under control and improving your editorial and production processes. Everyone on the team will be using the same language to speak about your content, you'll know exactly what you're producing and where it needs to go, and you'll be able to move content between your templates much more easily because all your style names will be consistent.

If you'd like to take it further, you might consider how content management systems, automation, and XML could fit into your publishing process. That's where Typefi comes in.

About Typefi

We help people publish content faster

Typefi is the world's only single-source publishing platform that fully integrates print, online and mobile production in a seamless end-to-end automated workflow. Typefi enables you to take any XML-based source of content and automatically produce over 30 output formats for print, online and mobile in under three minutes with 100% accuracy.



Typefi's core platform is unique in that it separates content creation from design to partially or fully automate composition. This means that authors and editors can focus on content development while gaining immediate feedback on layout at the click of a button. Designers are freed from mundane manual content updates and can instead focus on creating more appealing and consistent designs for print, online and mobile.

Late changes no longer cause issues for layouts, as content is updated at the source and then run through Typefi again to produce a perfectly designed, publication-ready output in minutes.

Typefi is easy to learn and easy to use. It integrates seamlessly with industry-standard software such as Microsoft Word, Adobe InDesign, and a range of content management systems and databases, enabling you to dramatically speed up your familiar publishing processes without compromising on design quality or accuracy.

Typefi also significantly increases your ability to rapidly and accurately publish content in multiple languages, and in standards-compliant accessible formats for consumers with print disabilities.

Most Typefi customers experience publishing production time savings of 50–80%, and the platform is so versatile that it can be used to produce almost any print or digital output.

Typefi is used by customers across a range of industries—including trade publishers, international organizations, government departments, manufacturers, educational publishers, professional associations, standards bodies, travel publishers, legal and financial services organizations, and scientific, technical and medical publishers—in 20 countries around the world.

Freeing your production teams from time-consuming manual tasks allows them to focus on what they do best—creating, producing and delivering outstanding content. That's why we say DO MORE.

<u>Contact us</u> if you'd like to learn more about Typefi, or if you'd like to discuss any aspect of your publishing process with our team.

About the author



Eric Damitz is a Senior Solutions Consultant at Typefi, where he works with customers to determine the best way to use Typefi for their particular needs, and then implements their solution.

Eric started in publishing over 20 years ago as a TeX typesetter at a small development house, where he learned such valuable skills as opaquing film, making Dylux proofs, and pasting up forms with hot wax. He also learned desktop publishing, which was somewhat more useful. He moved to a large educational publishing company and spent 17 years as a production manager working with his colleagues to reinvent how publishing works—several times.

Eric's particular skillset focuses on publishing automation, workflow improvement, and single-source publishing for both digital and print. He has a degree in Rhetoric (writing, not arguing) from the University of Illinois at Urbana-Champaign.



DO MORE.

Automation for print, online and mobile

Established in 2001, and with offices in Australia, USA, UK and the Netherlands, Typefi is the world-leading provider of single-source automated publishing for print, online, and mobile. Typefi is used by publishers worldwide to solve the fundamental issues content providers face day-to-day to publish complex content faster and more easily to more formats. Learn more about how we can help you at typefi.com.

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