



for Affiliates this month in Center research:



The Creation of the Open Publishing Guide

The primary goal of this month's report, *The Open Publishing Guide: Creating a Self-Publishing Website Using Open Source Content Management Tools (PICRM-2009-03)*, by Patricia Albanese, Matthew H. Bernius, Sean Conklin, Alvin Crespo, and Rachael Gootnick, was to report on the creation of the **Open Publishing Guide (OPG)**, and the process taken to develop the final website. The report also discusses the steps necessary to produce a website of the scope and scale of the OPG, provides an overview of the production methodology, discusses the process by which content was acquired for the site, and explores the web platform used to deliver the content.

Project Methodology

At its core, any web development project is about balancing (1) the delivery of the best possible experience for the user with (2) the needs of the organization delivering the website and (3) the technological features and limitations of the software platform that the website will run on. The success of a project is therefore dependant on choosing a workflow that, from the start, will establish and maintain the necessary equilibrium.

The workflow used to deliver the OPG was modeled off of the one laid out in Goto and Cotler's (2004) *Web ReDesign 2.0 : Workflow that Works*. Using their model, the production of the site went through five major stages:

1. Defining the Project
2. Developing the Site Structure
3. Designing the Visual Interface
4. Building & Integrating
5. Launching, Tracking, and Maintenance

Defining the Project

The goal of the first stage is to begin to understand both the needs of the users of the site and the needs of the organization. It is important to establish these first two areas *before* considering the technology that will be used to implement the site. This "needs based" focus, often referred to as *User Centered Design*, helps avoid the temptation to design a solution around what technology is available or what "looks good" to a graphic designer.

The proposal for the OPG included the following specific organization goals:

- Defining the scope of the existing barriers for non-technical users to self-publish.
- Documenting current standards and trends in self-publishing and on-demand publishing.
- Developing a set of processes and options that provide solutions for the non-technical user to self-publish.
- Developing a common resource for public domain and

Center Spotlight

 GAA Seminar

GAA/RIT Sustainability and Process Control in Gravure Packaging Printing Seminar

June 10-12, 2009
RIT Campus
Rochester, NY

This seminar is designed to help our members and nonmembers address key topics and resolve key issues with regard to sustainability, the carbon footprint of paper, and process controls.

Visit the GAA website to download a complete program outline and see registration details.



Inter-Society Color Council
2009 Annual Meeting &
Munsell Color Science
Laboratory 25th Anniversary
Symposium

June 7-8, 2009
RIT Campus
Rochester, NY

This meeting is open to everyone with an interest in promoting the interchange of ideas on the subject of color and appearance. This conference is design to promote communications between technically oriented specialists in color and

freely available content to use in the self-publishing process.

In addition to those goals, the team also identified a number of other important requirements. The most significant of these was the goal to ensure that the OPG would be updated on a regular basis. Achieving this meant the website would need to be editable by anyone with the correct level of access, including individuals with limited technical skills. The OPG project manager captured these and all other requirements (branding, budget, etc.) in a requirements document.

The next step was to define the user requirements. In order to accomplish this, the team recruited a number of *Subject Matter Experts* (SMEs). These individuals were familiar with the publishing process and regularly provided assistance to people seeking to self-publish. The OPG team began to meet regularly with the SMEs to identify the wide range of content, assets, and information that was available across the web. This led the team to an important decision: rather than attempting to replicate what was already available, the OPG would serve as a “golden thread”—a hub linking all of these resources together, and providing the content necessary to fill in the gaps.

Developing the Site Structure

As content was beginning to be identified, work began on establishing the overall structure of the site. The first step in this process is known as “bucketing” – taking each proposed piece of content and placing them with similar content (putting each group into a category “bucket”). This process allowed the team to see the different ways that the content could be grouped.

Once general categories were agreed upon, the next step was to consider how each category would fit into the overall site structure. In order to test the different content arrangements, the team came up with a variety of tasks that users might try to complete. The team put themselves in “the shoes” of these users and imagined how they might go about looking for answers. This process was used to identify various site navigation paths, and also to think about how different sections might be named. During this iterative process, various gaps in content were identified and then filled.

In the end, it was decided that the site would be divided into five sections:

- 1. About:** Information about the guide and how to use it.
- 2. Resources:** Links to content and assets across the web and a glossary of publishing terms.
- 3. Community:** A section of the site that would encourage interaction between users, and also aggregate up-to-the-minute information about news developments within the world of self-publishing.
- 4. Self-Publishing Advisor:** An interactive directory of online print-on-demand services.
- 5. Publishing Step-By-Step:** A series of articles that would sequentially cover each stage of the publishing process.

Working with this process, the team not only established the overall navigation and linking structure, but also developed the content framework for each section of the site. At the end of this process, the project manager was able to deliver a list, or content

creative workers in art, design, and education, so as to facilitate more effective use of color.

To register, visit the symposium website.

Additional Munsell Color Science Laboratory Short Courses are available June 9 - 12 as well - visit www.cis.rit.edu/mcs1



Print in the Mix

Print in the Mix is “a unique site demonstrating the role of print as a viable information medium in the marketing mix.” This **free** resource is published by the Printing Industry Center.

Sample Fast Fact:

*Forrester Research's latest forecast of interactive marketing spend predicts spend on display media, search, email, mobile and social media to reach nearly \$55 billion by 2014, accounting for 19% of all spend. **Read the full fast fact here.***

Have you visited **Print in the Mix** yet? Find out how this site can help you 'make the case' for print!

printinthemix.rit.edu

Funded by The Print Council



Industry Education & Training

RIT provides training in both traditional and digital technologies using world renowned instructors, comprehensive prepress and press labs, and state-of-the-art imaging facilities.

Our programs and services can help your organization make the most profitable use of new technologies, enhance productivity, boost customer satisfaction and produce a healthy bottom line.

Upcoming Industry Education Programs include:

May 20 - 21

The Digital Printing Press

June 2 - 3

Web-to-Print: How to Create a Successful Web-to-Print Strategy

June 2 - 4

FFTA/RIT Color Management

map, of every piece of information that needed to be gathered or written for the website. The content map, in turn, is used to understand how “big” the website will be and what resources (time and personnel) will be needed to deliver the content.

Choosing a Technical Platform

Now that the User and Organization requirements were documented, the team was finally in a position to make well-grounded decisions about which web technologies to use. As documented earlier, the site requirements meant that the OPG needed to employ a *content management system* (CMS). The decision to use a CMS generated additional organization and content gathering requirements. In particular, the CMS that was chosen needed to be one that was well supported and could be learned in a short time.

After evaluating a number of software packages, the OPG technical lead proposed that the project use **Drupal**, a popular open source content management platform. While Drupal has a steep initial learning curve for individuals who will be implementing its technical features, it is an extremely flexible and powerful program that allows for a significant amount of customization.

Furthermore, the Drupal platform is supported by an active worldwide community of developers and users, who constantly release new open source plug-ins and extensions to extend Drupal’s functionality. Finally, while the learning curve might be steep on the technical side, the content authoring interface resembles a word processor, making it easy to add, remove, and edit content.

Once these decisions were made, the project moved into its production phase. Content gathering and authoring, visual design, and technical implementation began to happen in parallel.

Gathering and Authoring Content

Just as the user and organization requirements shaped the OPG’s technology path, the technology path shaped how the content was collected. At the end of the Site Structure phase, the team had a content map that outlined every piece of content on the site. Each site section contained specific categories of content (definitions, articles, project templates, etc). The next step was to establish what made up each of those categories. Once those elements were established, the project manager, working with the site designer, created online input templates for each type of content and provided them to the SMEs who then began the process of identifying and collecting content.

In addition to formatting the structure of the content, care was also taken to format its style. The intention was that the site should function as an advisor or guide rather than as a teacher. Therefore, the OPG’s text would be written in an open and friendly style. Jargon was to be avoided if at all possible, and, where it could not be, it was to be accompanied by a definition or a link to the site glossary. All of these decisions were captured into a style guide to assist current and future SMEs in writing for the site.

Visual Design and Building

One of the great advantages to working with a CMS is that it enables parallel workflows. Once the technical lead implemented the content entry forms for the SMEs, they could begin to load text into the site even though the “display” aspect of the site did not yet exist. This style of workflow demonstrates the overall power in separating content (raw assets) from visual design. It provided the technical and design leads with a flexible environment to experiment with different designs. The following

for Flexography

June 3 - 5

Predictable Color Proofing and Printing

June 8 - 12

Orientation to the Graphic Arts

June 16 - 17

FFTA/RIT Principles of Flexography

June 16 - 19

Printing Process Identification and Image Analysis for Forensic Document Examiners

June 23 - 26

Matching Proof and Press

June 24 - 25

Variable Data Printing: Adding Value with Digital Printing

For more information on these and other programs, or to register for any of these programs, visit

www.seminars.cias.rit.edu

The eReview

The *eReview* is a monthly publication of the Printing Industry Center at RIT for registered Affiliate companies. Articles are also published in the quarterly printed publication *PrintReview*.

Subscriptions

You are receiving this newsletter because you registered as an Affiliate of the Printing Industry Center.

[unsubscribe](#)

Contact the Center

Co-Directors (email):
Frank Cost and Pat Sorce

Communications Coordinator (email):
Ashley Walker
(Web site, publications, general info)

Mailing Address:
Printing Industry Center
at RIT
College of Imaging Arts
and Sciences
Rochester Institute of
Technology
55 Lomb Memorial Drive
Rochester, NY 14623

steps were taken to build the site:

- Using the content map to establish different page templates.
- Creating individual wireframes for each template.
- Creating visually designed mockups of each template.
- Creating the actual web page templates in Drupal using the wireframes.

Beyond the writing, wireframing, and implementation of the visual design, there was one other important creation effort underway. In order to maximize site searchability, and, in particular, Google ranking, appropriate metadata was added to each page of the site.

Launching, Tracking, and Maintenance

Google Analytics is being used to provide quantitative data about traffic patterns to and within the site. This data will be supplemented with other quantitative and qualitative data gathered through online user surveys and offline user testing. The goal of all of this will be to iron out the proverbial “kinks” in the system, and to test the content to ensure that visitors find it useful. As data comes in, the design, navigation, and site metadata will be altered appropriately.

Findings

In addition to the experience gained from implementing the site, this project yielded a number of valuable findings about the state of online publishing. The first was the wide and diverse range of open source publishing tools available online. Open source software is available for every single step of the publishing process.

Additionally, there is a huge selection of publicly available, royalty-free fonts available online. Simply put, without engaging in any form of software piracy, individuals can download, for free, tools of the trade that begin to approach (although in some cases they are not the equals of) those used in the professional space. The effect that this availability of tools may or may not have on the publishing industry over time is one that warrants further investigation.

The process of assembling the chooser, or, as it appears on the final site, The Self Publishing Advisor, provided a wealth of information about the current state of online publishing services. What impressed the SMEs was the wide range of options available across all of the sites. In fact, arguably their greatest commonality was the diversity of their product and service offerings.

One thing that almost all of the sites offered were services to obtain an ISBN number for a customer’s book. However it was noted by SMEs that, in some cases, it is indicated in the small print that the print-on-demand site retains ownership of the ISBN number. An interesting line of inquiry would be to survey users to see if they understand the implications of such agreements.

In general, the many points of differentiation are better understood as continuums. For example:

- The amount of publishing knowledge that the end user is expected to have varies greatly from site to site.
- Book sizes range from standard paperback to large-scale high quality photo books. No site offered all options.

Phone:

 (585) 475-2733

Fax: (585) 475-7279

About the Center

Dedicated to the study of major business environment influences in the printing industry precipitated by new technologies and societal changes, the Printing Industry Center at RIT addresses the concerns of the printing industry through educational outreach and research initiatives.

Support for the Center comes from:

Sloan Foundation
Rochester Institute of Technology

Adobe
Avery Dennison
Democrat and Chronicle
Eastman Kodak Company
Hewlett-Packard
NewPage Corporation
NPES
Scripps Howard Foundation
U.S. Government Printing Office
VIGC
Xerox Corporation

- The length of production runs vary across the sites, ranging from those that offer very short runs (one or two copies) to others that will only print in bulk.
- The range of services also varies greatly. Some sites offer one-on-one help with editing, designing, and marketing, while others offer virtually no help.
- Some sites utilize social networking tools to interact with users and facilitate communication between users. Some feature groups that users can join to share work and ideas with other users who are producing work in similar topic/genre areas. Others provide tools that assist in the promotion of books.

Perhaps the best way to understand these differences is to chart of them on two axes. One axis charts the user's experience level with publishing, from neophyte to expert. The other axis represents the goal/the audience of the author. The products and services available range from those that appeal more towards individuals creating books for themselves and their immediate social circles to those that offer services for individuals seeking to niche or mass market their books. There is an opportunity to perform additional research into how the features of these sites fit inside the axes describe above.

References

Goto, K., & Cotler, E. (2004). *Web ReDesign 2.0: Workflow that Works* (2nd ed.). Berkeley, CA: Peachpit Press.

2008-2009 Research Monographs:

To read about this research in detail, download the monograph from: <http://print.rit.edu/pubs/picrm200903.pdf>

Research publications of the Center are available at:
<http://print.rit.edu/research/index>

[▶ BACK TO TOP](#)



© 2009 Printing Industry Center at RIT