

Improvising madly

Agile workflows and integrated digital strategy

Version presented at
TOC Frankfurt 2011

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The original version that includes material developed by Mike McNamara can be found at Mike's company website:

<http://araman-consulting.co.uk/latest-news/>



Contents

- A musical analogy (don't worry, not the usual one...)
- A holistic view of agile workflows
- Influences and success factors
- A couple of xml-first workflows for different needs
- Bringing it all together
- Final words



“Freedom in jazz improvisation comes from understanding structure”

Brian J Cane – Creating within Context

Take the A train (C)

The image shows a musical score for the song 'Take the A Train' in C major. It consists of eight staves of music. The first staff is the melody, starting with a C major 7 chord. The second staff is the bass line, starting with a D minor 7 chord. The third staff is the melody, starting with a C major 7 chord. The fourth staff is the bass line, starting with a D minor 7 chord. The fifth staff is the melody, starting with a F major 7 chord. The sixth staff is the bass line, starting with a D minor 7 chord. The seventh staff is the melody, starting with a C major 7 chord. The eighth staff is the bass line, starting with a D minor 7 chord. The chords are: C major 7, D7, D minor 7, G7, C major 7, D minor 7, G7, C major 7, D7, F major 7, D minor 7, G7, C major 7, D7, D minor 7, G7.

The concept of jazz – structure, separation, integration and improvisation – provides a way to think about the relationship between different elements in the organisation, the content itself, technology, and creativity in the digital age.

Publishing now needs to be both a science and an art: the science facilitates, the art differentiates.



Agile workflows – scaling up

- What do we mean by agility in the context of this talk?
 - People, processes, technology, content
- Beyond ebooks
- XML-first workflows

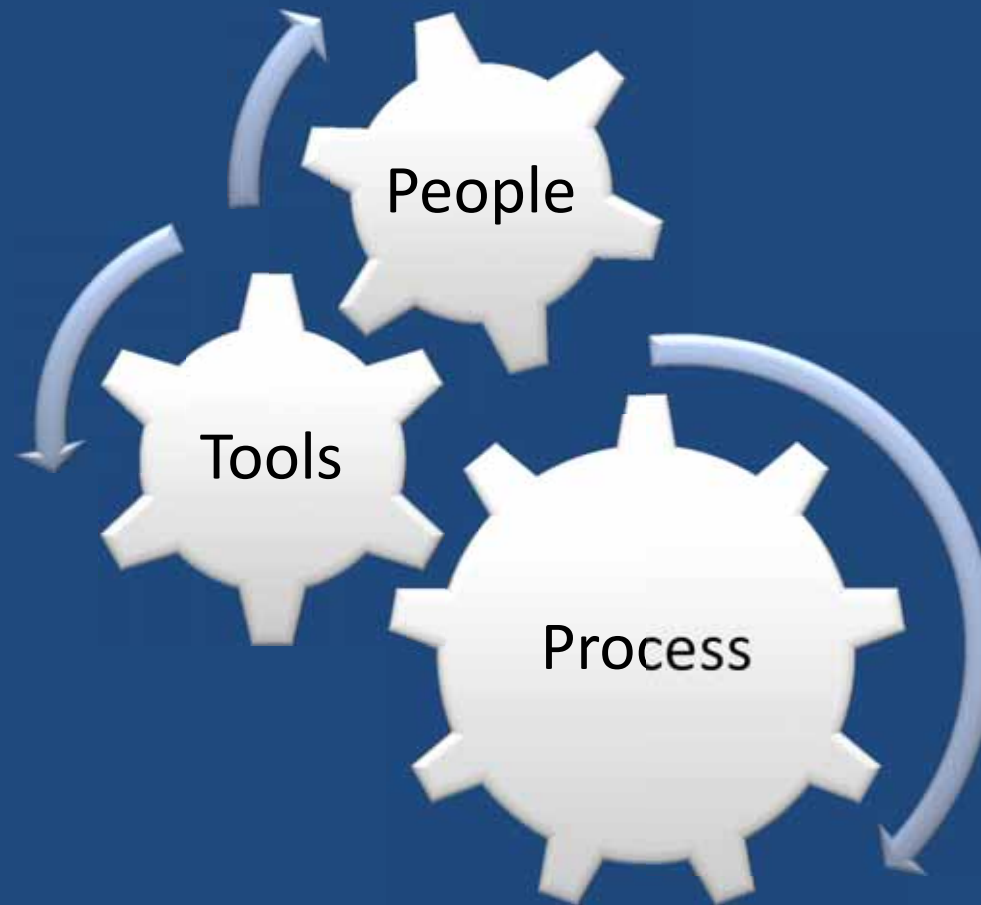


Business strategy – choosing the right key

- The business strategy must determine which workflow is chosen.
- Important questions
 - Does the business want to improve operational efficiency, perhaps as a first step, or does it want to radically transform itself ?
 - Do the CEO and Senior board members have the will and conviction to support such transformation?
 - Will adequate support and change management be set in place?



Keys to implementing agile workflows





It can seem daunting



Photo by Pavel Novak



Workflow

The very least you can do

Best if these can be 'enforced' by technology, but if you haven't got there yet, these are the bare minimum to move towards an agile workflow.

- Understanding of why format needs to be separated from content and structure
- Proper use of styles
- Consistent terminology
- Standard metadata (both biographical and inline metadata)
- Consistent file naming and folder structures
- Saving of source files in archives
- Proper archive server/directory
- Agreement about standard procedures
- Agreement about who does which part of the process
- Skills and knowledge gap analysis
- Consistent training across all departments
- Using the latest software (if possible)



Into the future: Web first

XHTML(5) and CSS3

- The web is natively digital, with a well-established high tech community with digital skills
- Uses open standards
- In a controlled environment, XHTML5 combines the power of XML (structure, semantic mark up) and HTML (presentation)
- Easily extensible using class attribute
- With some work, CSS3 can provide typographic control for online and print



Into the future: Web first cont.

Pros

- Agile workflow for smaller publishers
- Lower upfront XML investment
- XML skills not required
- Styles enforced by the technology
- CMS, easy export, collaboration, digital friendly
- Digital output created within native digital environment
- Collaborative authoring, editing, and marketing
- Easy to link to social media and get real-time comments from readers



Into the future: Web first cont.

Cons

- Less sophisticated web-based systems are still 'container' based
- New ways of working are required (but this is also a plus!)
- Designers need to learn CSS (but most should now know anyway)
- Possible lack of interoperability with other forms of XML
- Best suited to simple books (but this isn't a problem if this is in line with your business strategy)



One example of a web-based system

The screenshot displays the PressBooks web-based system interface. On the left is a sidebar menu with options: Dashboard, Home, My Sites, Text (selected), Organize, Add Part, Add New Chapter, Add New Front Matter, Media, Metadata, Authors, Comments, Export, Users, and Settings. The main content area shows the 'Edit Chapter' screen for a chapter titled '1. Everyone gets a bargain'. The top navigation bar includes 'PB No-Brainer', 'Howdy, twnsstr', 'Screen Options', and 'Help'. Below the title, there is a 'Permalink' field and buttons for 'Edit' and 'View Chapter'. A 'Formatting toolbar' is visible, featuring various icons for text formatting and alignment. A red arrow points to the 'Style names' dropdown menu, which is open and shows options like Paragraph, Address, Preformatted, Heading 1, Heading 2, and Heading 3. The main text area contains several paragraphs of text, including a paragraph starting with 'I wasn't having much success communicating this distinction while he had his pistol barrel' and another starting with 'I was hoping to make a trade that could benefit us both.'



PressBooks™ – Simple Book Production



Dashboard ▾
Home
My Sites
Text ▾
Organize
Add Part
Add New Chapter
Add New Front Matter
Media
Metadata
Authors ▾
Authors
Add New Author
Comments
Export
Users ▾

PB No-Brainer Howdy, twmsstr ▾

Edit Chapter Add New Chapter Screen Options ▾ Help ▾

1. Everyone gets a bargain

Permalink: <http://saybooks.pressbooks.com/chapter/chapter-1-2/> Edit View Chapter

Upload/Insert HTML toolbar Visual HTML

b i link b-quote del ins img ul ol li code more lookup close tags

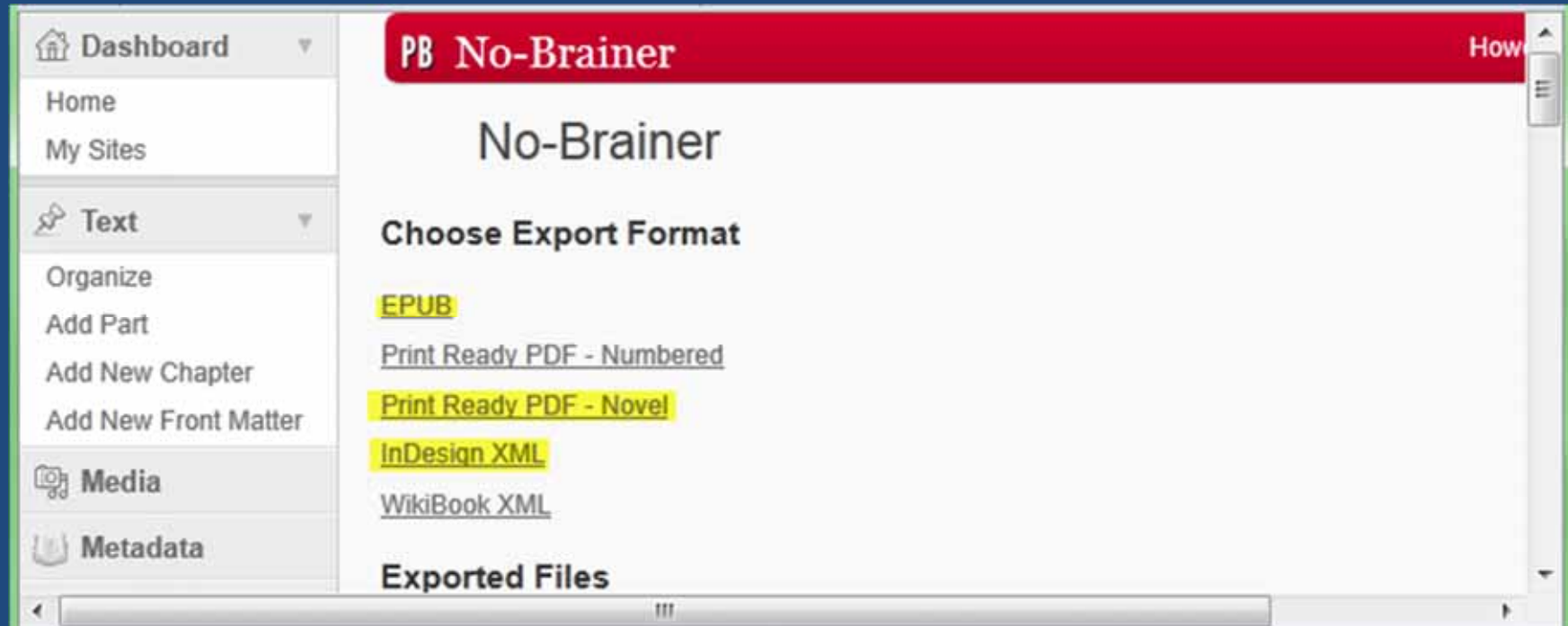
fullscreen

house and everything in it was a shame to getting one over on the schmucks. Brew used the evening to give one of the schmucks a guided tour of his achievements. He did most of the talking, with me weighing in with the occasional incredulous exclamation. ``Really, you got him to sign? That must've been a great moment for you!`` Meanwhile I was guzzling the wine for all I was worth, and all I was not worth.

We sat in his lounge, heaven to earth windows, Rangitoto like a black hat on the darkening sea. Whenever I look at that low, pointed island I wonder what it must've

HTML code behind the scenes





Single-source export to various formats



```
no-brainer-1317456473.epub* - Sigil
File Edit Format Insert View Tools Window Help
<Select heading>
Book Browser
Text
front_cover.html
title_page.html
table_of_content...
metadata.html
about_book.html
about_author.html
chapter-001-1-e-...
chapter-002-2-...
chapter-003-3-in...
chapter-004-4-h...
chapter-005-5-a...
chapter-006-6-f...
chapter-007-7-d...
chapter-008-8-vi...
chapter-009-9-ta...
chapter-010-10-...
chapter-011-11-...
chapter-012-12-...
chapter-013-13-...
chapter-014-14-t...
chapter-015-15-i...
chapter-016-16-t...
chapter-017-17-...
chapter-018-18-t...
chapter-019-19-...
chapter-020-20-...
chapter-021-21-t...
chapter-022-22-...
chapter-023-23-f...

1 <?xml version="1.0"?>
2 <!DOCTYPE html PUBLIC "-//W3C//DTD XHTML
3 "http://www.w3.org/TR/xhtml11/DTD/xhtml
4
5 <html xmlns="http://www.w3.org/1999/xhtml
6 xmlns:xml="http://www.w3.org/XML/1998/
7 <head>
8 <title>1. Everyone gets a bargain --
9 <link href="..../styles/book.css" rel="
10 />
11 <meta content="978-0-473-18787-3" nam
12 </head>
13 <body style="">
14 <h1 class="chapter-title">1. Everyone
15
16 <div class="body">
17 <p>My problem, I was trying to make
18 much that he was an evil asshole, but t
19 I wasn't having much success communicat
20 he had his pistol barrel stuck halfway
21
22 <p>In the back of my mind, while th
23 I wondered how an evening that had star
24 Noir and pumpernickel cheese straws cou
25
26 <p>I had gone to Drew Brody's house
27 didn't, while I had creative vision and
28 make a trade that could benefit us both
29 before next to the cricket field, where
30 being goaded to pay attention to the ga
31 the grass. Not having much interest in
32 to talking. He was one of those busines
33 turning companies around. I was making
34 at the time, doing small landscaping jo
35 in the garden of his cliff top home nee
36 know each other a bit. That was eight y
37 touch, which isn't surprising, given a
38 touch with. A day or two ago, it occur
39 friendship might have its advantages.
40
41 <p>She was a hit awarded, but I did
```

```
no-brainer-1315458317 export PB 8Sep2011.epub* - Sigil
File Edit Format Insert View Tools Window Help
<Select heading>
Book Browser
Text
Styles
book.css
Images
Fonts
Misc
content.opf
toc.ncx

33 }
34
35 span.chapter-number {
36 color: #c4161c;
37 border-right: .025em solid;
38 padding-right: 0.4em;
39 }
40
41 span.chapter-name {
42 color: #c4161c;
43 padding-left: .4em;
44 }
45
46 p {
47 text-indent: 2em;
48 margin: 0;
49 padding: 0;
50 }
51
52 p.noindent {
53 text-indent: 0;
54 }
55
56 p.prelim {
57 font-size: .90em;
58 text-indent: 0;
59 }
60
61 p.prelim-indent {
62 font-size: .90em;
63 text-indent: 1.5em;
64 }
65
66 span.first-letter {
67 float: left;
68 font-size: 3.35em;
69 line-height: 0.75em;
70 margin-top: .1em;
71 margin-right: .05em;
72 color: #c4161c;
73 }
```



Code and associated CSS



No-Brainer

Zirk van den Berg

[Front Cover](#)[Title Page](#)[About the Book](#)[About the Author](#)**1. Everyone gets a bargain**[2. Money moves](#)[3. Into the labyrinth](#)[4. Husbands and wives at dinner](#)[5. Adventures of a yuppie dad](#)[6. Formerly known as Mrs Lee](#)[7. Danger comes home](#)[8. Violent night](#)[9. Tarzan and Jane at Karaka Bay](#)[10. Moment of grace](#)[11. Houses of no hope](#)[12. Copper in the garden of steel](#)[13. You can go back to the place](#)

Font: serif / sans Size: + / - No distractions

[— PREVIOUS](#) [NEXT —](#)

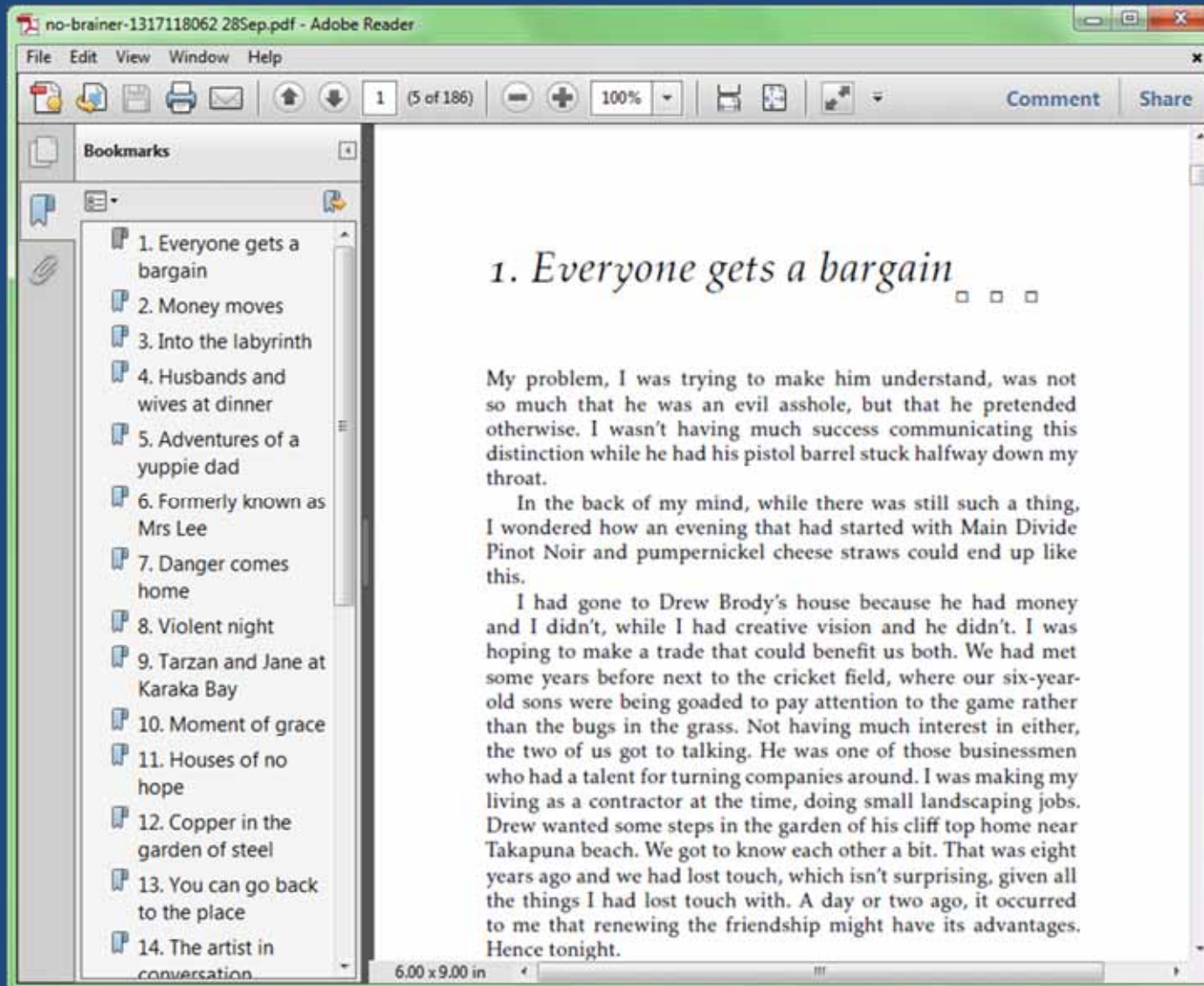
NO-BRAINER

1 | Everyone gets a bargain

My problem, I was trying to make him understand, was not so much that he was an evil asshole, but that he pretended otherwise. I wasn't having much success communicating this distinction while he had his pistol barrel stuck halfway down my throat.

In the back of my mind, while there was still such a thing, I wondered how an evening that had started with Main Divide Pinot Noir and pumpernickel cheese straws could end up like this.

I had gone to Drew Brody's house because he had money and I didn't, while I had creative vision and he didn't. I was hoping to make a trade that could benefit us both. We had met some years before next to the cricket field, where our six-year-old sons were being goaded to pay attention to the game rather than the bugs in the grass. Not having much



POD with inherited styles



Back to the future – IDML workflows 101

by Peppo Bonelli

What is IDML (and ICML)?

- IDML is a complete XML representation of an Adobe InDesign document
- ICML is a complete XML representation of an Adobe InDesign "story" (aka an InCopy file)
- IDML/ICML are public standards controlled by Adobe
 - resources:
 - http://www.adobe.com/cfusion/search/index.cfm?term=idml&siteSection=home&loc=en_us



IDML workflows 101 cont.

IDML use cases

- You have an InDesign book ready for print and you want to implement an xml-last workflow targeting a specific DTD/Schema (i.e. docbook/DITA/NLM/XHTML)
- You have structured content (XML or from a CMS) and you want to “paginate” it for print, with perfect typographical quality (and don't want to use XSL-FO, CSS3 or a TeX engine)*
- You want to assemble/disassemble InDesign files

*We only discuss the XML-first workflow in this presentation



About the author

Zirk van den Berg started his writing career in 1998. He was a journalist, an advertising copywriter, and a scriptwriter. Random House, New Zealand, published his first novel, *No Brainer*, in 2004. The New Zealand Herald named it one of the best thrillers of the year, alongside books by the likes of John Edgar Wideman. For more information about this novel at the end of the year, visit the author's website.

1 | Everyone gets a bargain

My problem, I was trying to make him understand, was not so much that he was an evil asshole, but that he pretended otherwise. I wasn't having much success communicating this distinction while he had his pistol barrel stuck halfway down my throat.

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I had gone to Drew Brody's house because he had money and I didn't, while I had creative vision and he didn't. I was hoping to make a trade that could benefit us both. We had met some years before next to the cricket field, where our six-year-old sons were being goaded to pay attention to the game rather than the bugs in the grass. Not having much interest in either, the two of us got to talking. He was one of those businessmen who had a talent for turning companies around. I was making my living as a contractor at the time, doing small landscaping jobs. Drew wanted some steps in the garden of his cliff top home near Takapuna beach. We got to know each other a bit. That was eight years ago and we had lost touch, which isn't surprising, given all the things I had lost touch with. A day or two ago, it occurred to me that renewing the friendship might have its advantages. Hence tonight.

He was a bit guarded, but, I suspect, also in need of an audience. Even though school had started, his family had bugged off to Wanaka to ski and he had a week to kill on his own. The rich make their own rules. I'd learned about the trip when I'd bumped into Mrs Brody and the kids at the airport. I sometimes work there in the parking booth, where I pretend to be a machine, albeit one with a taste for talk radio. Talk radio makes me despair for humanity; art offers hope. While it's good to be reminded that there are people worse off than yourself, I'm generally more interested in those who are better off. Drew Brody had surrounded himself with evidence of success. The house and everything in it was a shrine to getting one over on the schmucks. Drew used the evening to give one of the schmucks a guided tour of his achievements.

LINKS

Name
No-brainer-cover.jpg
no-brainer...19493.icml

1 Selected

Link Info

Name: no-brainer...19493.icml
Format: InCopy Document
Page: 1
Status: Contained
Size: 876 KB (896995 bytes)
Place Date: Ven, 30 set 2011 10:30
Layer: Livello 1
Modified: Ven, 30 set 2011 10:22
Path: Macintosh ...19493.icml
Story Status: Unmodified
No of Notes: 0



XML without XML tags



IDML workflows 101 cont.

Pros of IDML XML-first workflow

- The .icml file is a linked resource
- Changes in CMS automatically synchronized
- InDesign views it as an InCopy file, so all the usual InCopy workflows can be leveraged
- The changes made to the content within InDesign can be round-tripped back to the CMS by exporting again in ICML or IDML (in IDML the layout also gets exported)

Cons

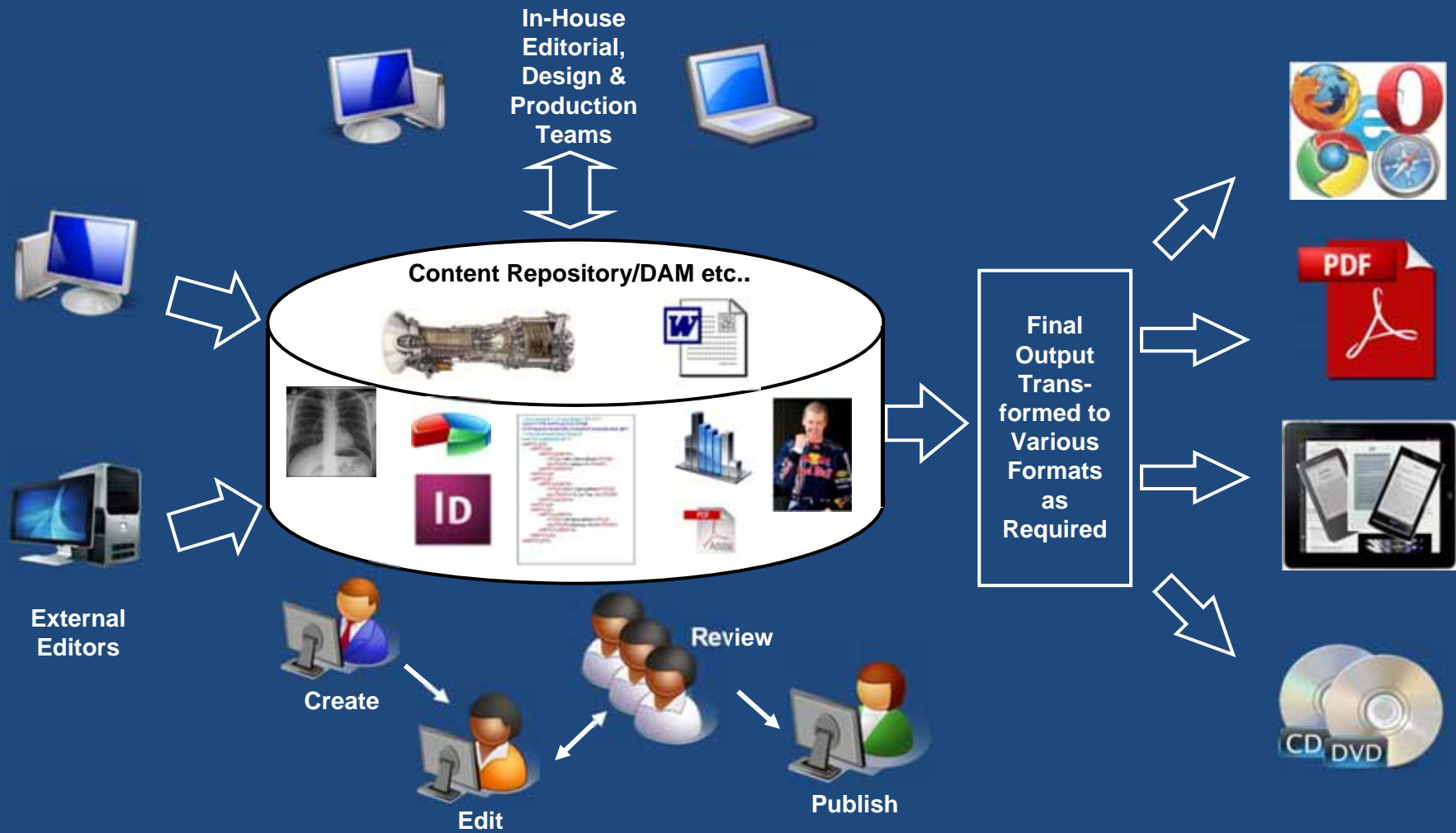
- Need consistent and rigorous use of styles in InDesign (but consistent use of styles is essential in all agile workflows)
- XML programming skills required somewhere



A little rest



Bringing it all together



Agile Workflows



So if you are looking to ...

Goal	Keep in mind
Streamline ebook production	<ul style="list-style-type: none">• Standard formats, particularly EPUB, exist• If you support more than EPUB, buy, borrow or create transforms that can be reused across titles
Produce more formats	<ul style="list-style-type: none">• Figure out the formats first (large print, POD, library edition etc.)• Buy, borrow or develop XSLT and XSL-FO tools that can be shared or easily adapted• Simplify: make XML files that support seamless downstream use
Improve internal processes	<ul style="list-style-type: none">• Catalog pain points (file maintenance, retrieval, versioning, etc.)• Be clear where XML helps (versus workflow improvement alone)• Focused projects: short or prototyped; senior and operating support; look for early wins

Growing your content breadth

Goal	Keep in mind
Repurpose content	<ul style="list-style-type: none">• Tie plans back to pain points, where applicable• Buy/develop XSLT and XSL-FO tools that can be shared, adapted• Simplify: make XML files that support seamless downstream use
Create related “chunks”	<ul style="list-style-type: none">• Capture and share deep editorial knowledge• Prototype and test (make many small mistakes, not one big one)• Test pricing where you can (not an XML suggestion, but ...)
Create expanded editions	<ul style="list-style-type: none">• Survey (be mindful that the expressed need may not be there)• Engage both editors and marketing/sales staff (break down silos)
Develop or use mobile apps	<ul style="list-style-type: none">• For smaller publishers, app development is likely not a priority• To take advantage of app readers, ask for standards (typically XML-based) and structure content so that it can be ported easily.

Final words - on integration

- History may repeat itself (in dot.com era, many companies which created separate web units were not so successful)
- Agile workflows lend themselves to integration
- We are talking as much about the organisation as we are about the digital process
- Creativity is enhanced by 'cross-boundary' work, so perhaps integrate different departments
- Integration and creativity depend on the paradox of initial structure and separation, whether it be of content, the organisation (or music)



A final note (or two)

- Here is the great Duke Ellington playing 'Take the A Train' <http://www.youtube.com/watch?v=bHRbEhLj540>
- The basic musical structure is established: chords, musical key, rhythm, simple melody
- As time progresses and the musicians are comfortable with the structure, they loosen up, have fun, and improvise ...



Let's improvise!



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Mike McNamara (mike.mcnamara@araman-consulting.co.uk)



Credits: pages from *No-Brainer* by Zirk van den Berg (Say Books); screenshots courtesy of PressBooks.com™ (PressBooks was in beta testing at the time); IDML workflow by Peppo Bonelli); slides 6, 24, 25 by Brian O'Leary; 'body language' animation © Lindsey Horne; Duke Ellington and his band, and Columbia Records for 'Take the A Train', via YouTube™.

