

# ABZ

## FINGER-SWIPE FORMATS

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**TROX GMBH BREAKS NEW GROUND IN CATALOGUE PRODUCTION**

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## STANDARD CHECK:

*10 questions on ISO/IEC 82079*

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## CMS: A SLEEPING BEAUTY

*When is it worth kissing your CMS back to life?*

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**"WHO'S AFRAID OF ECOMMERCE?"**

**"NOBODY!"**

**"BUT IF IT'S ACTUALLY HERE ...?"**

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## LATEST FROM THE MOBILE FRONT

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## EDITORIAL

What does the phrase “yellow time” mean to you? A place in the sun? Waiting in the queue at the post office counter? Or perhaps an appointment with TANNER? In fact, “Yellow Time” was chosen as the title on the front page of a brochure issued by the City of Düsseldorf. Inside – believe it or not – the brochure gives instructions for citizens on how to cross a road with pedestrian traffic lights. And the instructions go on for no less than eight pages. Here’s a sample: “The lights change to green. This is the ideal moment for pedestrians to start crossing.” By the way, the brochure was called “Yellow Time” because Düsseldorf is the only city in Germany where pedestrian traffic lights have a yellow phase. Was called – because the PDF has now disappeared from the City’s website without comment after a barrage of derisive criticism.

In this issue of ABZ, we invite you to take some useful “yellow time” to consider the whole business of instructions and similar documentation. Read on to discover how TROX AG has successfully converted its catalogue production process, for instance. And we set out the key content of the new ISO/IEC 82079 standard on user information, in a ten-question format.

I hope you will learn a lot from reading this issue.

Sincerely,



Georg-Friedrich Blocher



# FINGER-SWIPE FORMATS

PUB, Folio and iBooks – these are all names of content formats, and their job is to make sure that content can be displayed on mobile terminal devices such as smart phones and Tablets. This article presents the main formats and shows you the differences between them.

### PUB format

ePUB is probably the best known example of the “new” content formats for mobile terminal devices. Essentially, this format consists of a zipped internet page or site that is outputted in browsers (ePUB readers). Therefore, some points that apply to web design in general are also true of ePUB: The content looks (a little) different in each browser and with each operating system. This is because all manufacturers and platforms use different readers. The latest version of ePUB (3.0) significantly upgrades the design options by adding HTML5, CSS3 and JavaScript integration. Nevertheless, it is still more suitable for text and image content.

### Portable Document Format (PDF)

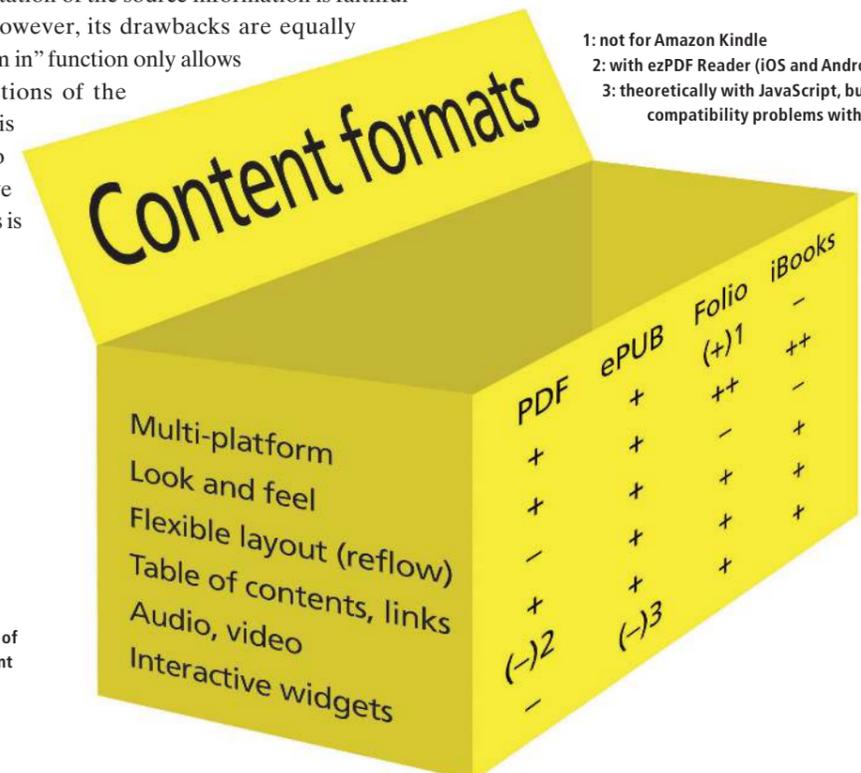
The “dinosaur” among content formats also earns its place among the options for mobile terminal devices because of one particular problem: content is interpreted differently by different browsers and operating systems. Yet again, PDF (Portable Document Format) scores points thanks to its key feature: the presentation of the source information is faithful to the original. However, its drawbacks are equally obvious. The “Zoom in” function only allows users to view sections of the document, and this format’s ability to integrate interactive multimedia widgets is limited.

### Folio format

Folio format, like PDF, is a product of the Adobe company. It aims to meet those requirements for contemporary digital publishing that PDF cannot satisfy. Quite a few experts think that this new format could replace PDF at a stroke. Onboard features already included in InDesign CS6 can convert InDesign documents into interactive multimedia folios with audio, video and picture galleries, etc. As with PDF, there is a free reader for viewing on all relevant platforms, the “Adobe Content Viewer”. But when it comes to free dissemination of content – such as pre- or after-sales information in the B2B segment – the Adobe business model may prove negative, because platform fees and possibly additional charges are incurred for each download.

### iBooks format

The iBooks format is an Apple product. “iBooks Author” can be used to process content for the Apple iPad, and to enhance it with additional media (video, 3D models, picture galleries, etc). iBooks is offered free of charge to users, and the party offering the material is entirely free to choose the type of distribution. Publications only have to be distributed via the Apple iBooks Store if users have to pay for them.



	PDF	ePUB	Folio (+)1	iBooks
Multi-platform	+	+	++	-
Look and feel	+	+	+	+
Flexible layout (reflow)	-	+	+	+
Table of contents, links	+	+	+	+
Audio, video	(-)2	(-)3	+	+
Interactive widgets	-	-	-	-

- 1: not for Amazon Kindle
- 2: with ezPDF Reader (iOS and Android)
- 3: theoretically with JavaScript, but beware of compatibility problems with readers

Strengths and weakness of mobile publishing content formats at a glance



## TROX GMBH BREAKS NEW GROUND IN CATALOGUE PRODUCTION

TROX GmbH leads the market when it comes to developing, manufacturing and marketing room ventilation and air conditioning components and systems. Based in North Rhine-Westphalia, the company offers products ranging from air diffusers and air distribution control devices to fire dampers and centralised air handling units. Early in 2011, TROX decided to convert its entire catalogue production process. The primary purpose of this changeover was to build up in-house expertise on catalogue production so that catalogues could be produced internally in the future. TROX had already done its homework by acquiring the key tool for this undertaking – a PIM system for the company’s product data.

The next stage was to fill this system with all the product data, including text, photographs and dimensional drawings as well as technical data and value tables. To complete the project, the catalogues were to be restructured and redesigned, and fresh content was to be added. TANNER AG was called in to support TROX with the project.

### Opting for in-house catalogue production

Back in 2008, TROX contracted a service provider to revise its filter catalogue. As the project proceeded, however, the team at TROX realised that transparency was less than satisfactory – not only in terms of communication, but also in the process itself. The brand-name producer responded by deciding to focus more on its own skills in the future, and to

import the necessary expertise into its own premises in North Rhine-Westphalia.

Christine Rosskothén, Head of Corporate Marketing at TROX, comments: “An important point here was for us to set up a functioning process in house that could be transferred to catalogue production in the future – and one that could accommodate a globalised approach in the course of time.”

This project involved a complete revision of all the catalogues: “Air Conditioning 1”, “Air Conditioning 2” and also the Filters catalogue. However, TROX lacked the capacity and expertise needed to implement a catalogue project of this scale – after the revision, the catalogues would contain more than 2,500 pages. “Above all, we were looking for someone to steer the project – someone who already had a proven track record of undertaking catalogue projects of this sort”, Christine Rosskothén explains.

### Reliable service provider needed

Ms Rosskothén, who is in charge of catalogues, adds: “We approached TANNER because – apart from transparency of services and costs – we believe that a service provider’s reliability is crucial; and if resource bottlenecks develop, we must be able to call on additional support.”

Some 30 individuals are involved in the catalogue project. Three TANNER employees provide on-site support for the team at Neukirchen-Vluyn: two technical editors and one project manager, who is chiefly responsible for coordinating

the catalogue project. He ensures close liaison among the various departments and monitors process compliance; he also assists TROX and advises on every aspect of catalogue production. TANNER’s technical editors provide in-house support with data revision for the TROX editorial team. This is a huge undertaking, because every graphic, table, chart and text module ever created for TROX products is being revised or recompiled by the editors. TANNER’s headquarters at Lindau offers additional support for the editors with special tasks, or if the workload becomes too heavy.

### Turning three into seven: range segments create the basis for the new suite of catalogues

TROX’s previous catalogues consisted of tab index folders in which individual documents were filed. One of the first requirements was to group the individual documents into seven sub-catalogues. This means that the catalogue titles are identical with the names of TROX’s individual range segments.

### Demanding requirements for product descriptions

TROX wants to make it easier for customers to navigate through the catalogues by improving the user guidance. This is certainly a challenging task: TROX specialises in ventilation and air conditioning technology, so its old catalogues were packed with charts and tables which customers could use to configure their products directly in the catalogue. Another aspect is that some TROX products are used in sensitive areas, so they require a lot of explanation. Descriptions can often run to 20 or more pages.

TROX and TANNER started out by organising workshops to deal with terminology. They defined terms that are now used as standard in all the catalogues. Finally, a concept was developed that defines how information should be processed across all the product groups. This information is broken down into small fragments and is then displayed in a standardised grid, always in the same sequence. “All the future TROX catalogues have the same structure. Although the TROX catalogues are complex, if you understand one of them, you will also understand the catalogues for the other product groups”, according to Klaus Pochert (who heads up the project for TANNER).

### Link between print catalogues and online product configurator

A link to “Easy Product Finder”, the TROX design programme, made it possible to reduce the depth of information in the catalogues. Mr Pochert explains: “The catalogue is intended to give customers an initial overview. There’s no sensible way to present such an enormous amount of information – the countless charts, for instance – in a printed catalogue. Another point is that young engineers in particular can often do very little with the charts and tables, because they are accustomed to working with special software.” In future, customers will carry out their specific planning exclusively online, with the help of the Easy Product Finder.

### With globalisation in mind

Even before the new product information texts were produced, the project managers were focusing on an international approach. “In the future, the catalogue is to be published in 16 language versions,” Christine Rosskothén points out. “We have revised the content to improve quality. Texts were abridged, generalised and standardised so as to prepare the content for translation.” The asim database (which is the starting point for catalogue production) will map the TROX GROUP’s entire range in the future. All 24 subsidiaries will then use the same data stock to generate individual catalogues for the products they market.

### Digital and print campaign to accompany the rollout

By July 2012, the team had already completed two of the seven catalogues required. The rollout of these two catalogues, each with a print run of 15,000 copies, took place only two months later, in September. The other catalogues are scheduled to follow in 2013. And the TROX/TANNER team is working “full steam ahead” to attain this goal.



# STANDARD CHECK: 10 QUESTIONS ON ISO/IEC 82079

In August 2012, standard ISO/IEC 82079 was published in English and French as the successor to DIN EN 62079 "Preparation of Instructions". ISO/IEC 82079 is therefore the only standard with worldwide validity that governs the preparation of information for users. It defines overall conditions, the content of user documentation and methods of conveying the information. In this article, we give you answers to ten key questions about the new standard.

## Does following the requirements specified in ISO/IEC 82079 automatically result in good documentation?

ISO/IEC 82079 sets out a large number of points that influence the quality of user information. Typical aspects include consistency, ease of reading and understanding, functional identification and access to information, etc. Taking note of these aspects will also have a positive impact on the information product. But the standard also states that the information must be produced by specialists; this applies to text, illustrations and translations. The standard sets out the framework that these specialists must fill in with their expertise.

## The standard also talks about documentation using electronic media. Is paper documentation now becoming superfluous?

No. The standard describes how information must be processed in electronic media so that it can serve its purpose. At the same time, however, it stresses the requirement for immediate access to relevant information at all times. This is especially true of safety-related information or information about setting up a product. Paper documentation is still the only sure means of ensuring this availability.

## Does ISO/IEC 82079 also have anything to say about translations?

Yes. Basically, the standard requires information to be made available in the language(s) of the country where the product will be used. Until now, this requirement was only stated explicitly in sector-specific standards such as the Machinery Directive and even in those cases, it often referred solely to the EU. Moreover, ISO/IEC 82079 addresses the problems involved with international distribution via the internet, which as a general rule also entails a requirement for translations.

## ISO/IEC 82079 states requirements for warnings. So far, I have formulated my warnings according to ANSI Z535.6. What changes must I make now?

If the warnings are correct: no changes are needed. The definitions in ISO/IEC 82079 match up very well with the ANSI requirements. The statements are very similar in many important respects. This applies in particular to the meanings of words used in warnings, the indication of the nature and source of a hazard, consequences of ignoring the warning and measures to prevent damage or loss. However, ANSI specifies additional options for conveying safety-related information.

## What basis should I actually use when preparing safety information or warnings?

ISO/IEC 82079 explicitly mentions risk assessment as a procedure to define the requirement for safety information and warnings. This procedure is already established and has proven its merits in other sectors such as mechanical engineering and medical technology in particular. After all, warnings in documentation are the last resort for protecting users. Higher priority is always given to structural measures, protective equipment and warning signs or labels on the product.

## The standard requires instructions or guidelines on preparing user information. Which aspects should these documents regulate?

The standard explicitly mentions a "style guide" that regulates these aspects: specimen wordings, choice of words, terminology, how to address users, layout. However, consistency of information is also required elsewhere, for instance in tables and illustrations. Therefore, binding requirements must be defined for the relevant aspects in these cases as well. This is particularly important if several individuals are working in parallel, or if information is updated over a lengthy period.

## If products are subject to the Machinery Directive, is there any need at all to take note of ISO/IEC 82079?

Of course there is. The Machinery Guideline merely requires the availability of information defined as a basis, such as the operating instructions and maintenance information, etc. The Machinery Guideline does not say anything about how this information should be imparted. This is where the ISO/IEC standard comes into play.

## Given that the standard applies to instructions "of every kind", even including instructions for turnkey industrial systems, what does it have to say about "Plant documentation", for example?

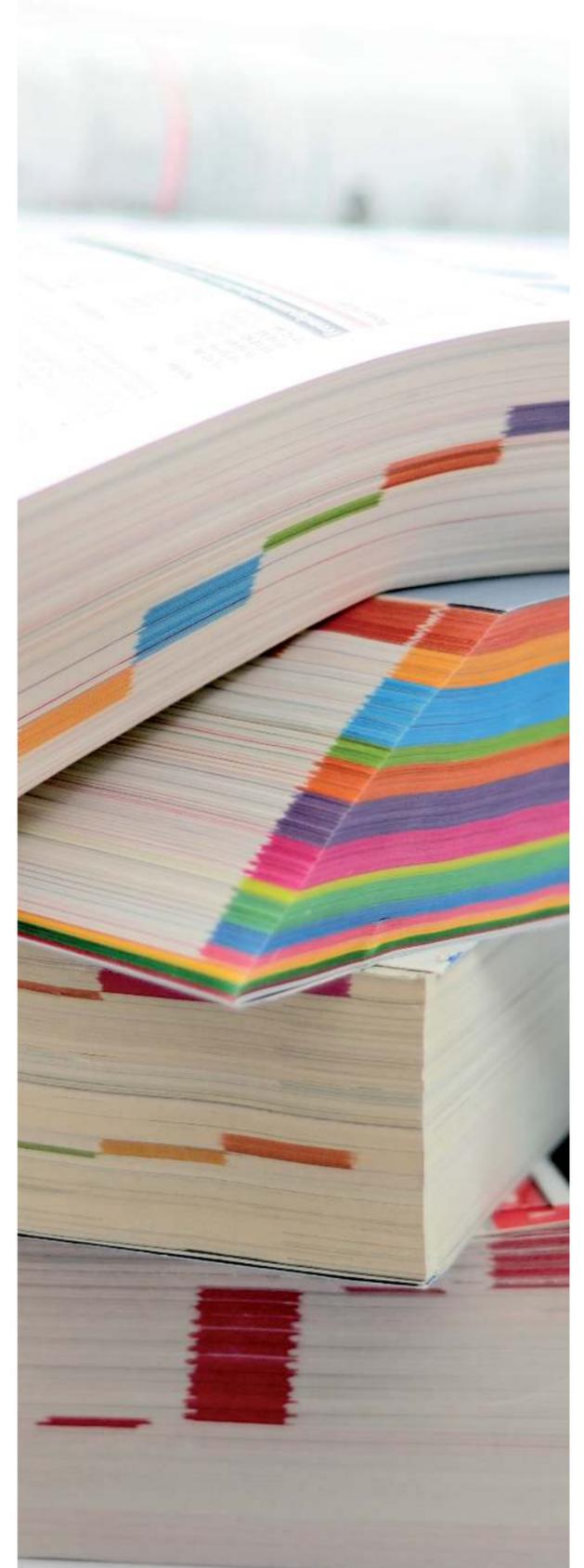
Regrettably little. The statements are extremely general in nature and in principle, the main point they make is that the users' need for information depends on the expertise of the users themselves, the complexity of the plant and the tasks of the target group. Otherwise, the standard states certain requirements that are already known. For instance, a comprehensive maintenance plan is required for a plant. Furthermore, warnings must cover the entire plant and its behaviour, not just the hazard situations that could arise from individual components.

## How does the standard relate to services?

The standard applies to products. According to the definition in the standard, a product may also be a service. And in connection with services too, there is often a need to prepare information on how the service can be provided safely and to the customer's entire satisfaction. Therefore, the stipulations in the standard also apply to information which supports a service. Process documentation is a typical example.

## Does ISO/IEC 82079 only apply to the commercial or industrial sector?

Definitely not. On the contrary: the standard often refers to the requirements of users who have purchased consumer goods. Consideration is also given to the interests of disabled persons, such as those with impaired vision. In industry, employees cannot be expected to operate a machine if they cannot see it properly. Other sections of the standard also deal explicitly with the procedure in the consumer goods sector: for instance, it is stated that instructions should additionally be made available for users to download from the internet.



# CMS: A SLEEPING BEAUTY

## *When is it worth kissing your CMS back to life?*

This article is an abstract from the presentation with the same title by TANNER employees Alexander Witzigmann and Margot Poschner. They gave a presentation on this subject in November 2013 at the annual meeting of tekomp, which is the German-language conference of the European Association for Technical Communication.

There are no official statistics to tell us how many CMS projects start out with euphoria, only to fall into a profound and lengthy slumber. If we trust the figures from other software sectors, 25 % of projects are abandoned. Even systems that are introduced “successfully” in terms of technology do not always meet with acceptance from the users, and the anticipated benefits fail to materialise.

### Nothing can possibly go wrong

Companies wanting to introduce a CMS nowadays are usually well informed thanks to advice in the form of various books, presentations and training courses. Software houses and service providers are glad to offer additional help. Technical editors are well trained. Really, nothing can possibly go wrong! Our fictitious example (which is nevertheless based on real events) shows that the outcome can be quite different.

### Case study

In this major international corporation, service documentation is produced by service technicians. The service technicians work independently as part-time editors, using WORD with a “.dot”. Years ago, they were trained to handle formatting templates and a functional design program (Funktionsdesign®).

The company wants to gear up for the future, so it has opted for XML Content. By introducing this system in the service area, the firm aims to standardise content worldwide and establish quality-assured processes. An in-house project manager is introducing the CMS on a state-of-the-art basis. However, the introduction is dragging on for far longer than expected. After the technical acceptance for the CMS, the service technicians’ “migration” to CMS is repeatedly postponed. Negative comments on CMS pile up, although extensive documentation on handling the system and the editing concepts is available, and training courses are organised for the service technicians. Examples of documents are even entered in the CMS to make it easier for the technicians to switch over to XML.

Management cannot understand why the service technicians do not accept the CMS, despite attempts to involve them in the CMS launch and to build various “bridges” for them.

### How to penetrate the thorn hedge

It’s only in the fairy tale that the thorn hedge is transformed into a bed of roses, clearing the path for the prince. In reality, plenty of patience and persistence are required to “re-awaken” a CMS project. The failure of a CMS launch usually leaves a more or less nasty taste behind in the mouths of everyone involved. In a situation like this, the purpose is served better by accepting the status quo and adopting a future-oriented outlook.

### Step 1: Designate the responsible individual(s)

The first step in resuming a CMS project calls for courage to state the problem clearly; a responsible individual must be assigned to create the basis for deciding whether the CMS launch will be resumed as a project and if so, in which form. In our view, it is essential for this person to come equipped with the following skills:

- ▶ Strong communication skills
- ▶ Experience of CMS launches and working in a CMS
- ▶ A results-oriented mindset and readiness to think outside of the box

### Step 2: Redefine “success”

Once a major project has become mired in a lengthy crisis, the numerous problems make it difficult to identify what a “successful” outcome of that project would actually have delivered. So another important step along the path of improving the situation is to redefine success. As well as the “hard factors” (costs, deadlines, quality of content and processes), it is also necessary to consider “soft factors” (such as employees’ motivation and readiness to change) that are key drivers of success – or failure.

In this phase, it is important to put open questions to everyone involved, in order to identify specific and actual concerns and needs, e.g.:

- ▶ How must the CMS look in a year’s time so that you can say it represents a positive development?
- ▶ What has to be eliminated so that you can work with the CMS?
- ▶ When will it be worth your while to work with the CMS?

This step will deliver clearly defined success factors as viewed personally by each individual.

### Step 3: Define success criteria and identify the “show-stoppers”

From the responses, the project manager can derive the success criteria and identify potential reasons why success has not yet been achieved. Here is an example:

- ▶ Service technician’s reply: “I used to write the documentation during a train journey or at home in the evenings. I would work with the CMS if I could access it off site.”
- ▶ Success criterion: Produce documents without being present at the workplace
- ▶ Possible reasons why this success criterion is not yet met: The technicians cannot store data from the CMS locally on their computers so that they can process it and then import it into the CMS. The technicians cannot access the CMS from home or while travelling.

The goal of this step is to identify the real success criteria and express them in specific form.

### Step 4: Develop ideas on possible ways of meeting the success criteria

Key users or multipliers from all relevant areas (editorial team, IT, specialist departments, etc.) should be involved in developing and assessing ideas (step 5).

### Step 5: Assess the ideas that have been developed

Every idea is evaluated to judge its impact on the success criteria. This makes it possible to identify alternative solutions that contribute most towards attaining success; these should be followed up as top priorities. The most promising ideas should be stated in specific form, and should be run through under practical conditions with the users concerned.

### Step 6: Develop an action plan

Specific plannable and measurable actions can eventually be derived to provide a basis for the decision on whether to resume the CMS launch as a project and if so, in what form.

### Summary

Successful CMS projects require systematised content and processes, a suitable tool and – most important of all – the potential for users to be inspired in the long term by this wonderful new world. This is a wide-ranging challenge that is often underestimated, so failure is not a disgrace.

The courage to resume an implementation that has already failed, and genuine resolve to identify the real success factors for everyone involved in the CMS: these are the crucial steps that will allow life to return to the Sleeping Beauty’s castle.

Actions	Success criteria		Outlay	
	Produce documents when not present at the workplace	Information model suitable for editors	initial	ongoing
Input as WORD, full-time editors incorporates changes into CMS	●	●	×	×××
Access to CMS via Citrix	●	○	××	××
Function for local editing of CMS content	◐	○	×	×
Coaching for service technicians	○	◐	×	××
Simplify the information model	○	◐	×××	×

● Met in full ◐ With restrictions ○ No impact

Assessment matrix (example)

## “WHO’S AFRAID OF ECOMMERCE?” “NOBODY!” “BUT IF IT’S ACTUALLY HERE ...?”

A look at the various studies available on eCommerce in B2B business is quite a giddy experience. Depending on who has commissioned the market survey, you will find buzz words such as “Social”, “Mobile”, “Customer Journey”, “Customer Experience”, “Cross Media”, “Multi Channel”, “SEO” and plenty of others that supposedly pinpoint the latest trends. But attentive scrutiny will quickly make one principle clear: The only statistics you can trust are those you falsified yourself. However, it’s also true that some current events should give the B2B marketers pause for thought. Where, in fact, is the eCommerce journey in B2B headed? This article attempts to give some approximate answers.

Among the profusion of market studies that is available, the inventory taken by the Cologne-based Institute for Retail Research (IFH) may be regarded as by far the most objective example: at the start of 2013, the IFH determined that Germany’s B2B sector accounted for 95% of the total volume of eCommerce last year, with EUR 870 billion. The quota of orders handled via “classical” online shops was comparatively small, at EUR 35 billion.

What do these figures tell us? On the one hand, they show that there is no longer any need to debate the relevance of eCommerce in B2B. This powerful channel has long been a reality. On the other hand, the potential for “direct” sales via online shops still remains huge.

### New players on the starting line

The likely scope of this potential is not only proven by the relevant statistics. The activities of the major players provide even clearer evidence. In this context, news that jolted the global B2B community was released in April 2012: The trading giant Amazon had opened a B2B shop – “AmazonSupply”. Since then, business and industrial customers have been able to purchase products in 14 main categories and about 200 sub-categories, ranging from office supplies, tools and working materials or laboratory equipment to valves, cables, work apparel and so on. AmazonSupply now has over a million articles in its range.

Many B2B trade experts viewed Amazon’s entry into the B2B market as non-critical for old-established traders and manufacturers. Reliable immediate availability, technical advisory expertise, service and logistics were quickly advanced as arguments to prove that Amazon could not pose a major threat to the existing B2B trade in this sector. Since then, however, more voices have been raised in warning – and, probably, rightly so.

For example, the first figures about acceptance of the new offering in the USA confirm this concern. According to a study by the Acquity Group, almost half of all buyers with annual company budgets of more than USD 100,000 at their disposal had already placed orders via AmazonSupply within

the first twelve months of the new platform’s launch. And 25% of them had not just placed one order, but were ordering on a regular basis.

### Clearly more than a rumour: private purchasing experiences also appreciated in B2B

So there are strong indications that business customers are prepared to abandon established business relationships with conventional dealers – at least in part – and to opt instead for the renowned “comfortable buying” that they already appreciate from private consumer purchases with Amazon. In the referenced survey by the Acquity Group, 71% stated that if the price was the same, they would leave their regular supplier and buy the product instead from a different shop with better comfort for users. And for 32% of respondents, the comfort and efficiency of the online purchasing process actually outweigh the price factor. In Amazon’s case, the well-known user-friendliness of the shopping platform is only one element of this comfort. In other respects too, Amazon is already showing where the journey could lead. For example, the Seattle-based trader offers free delivery within two days for purchases worth USD 50 or more, as well as the right to return goods within 365 days. Telephone orders (including advice) are also possible for business customers.

### What if Amazon really takes its gloves off?

The AmazonSupply logo still includes the small “Beta” add-on. One thing is clear: If, in the not too distant future, the company decides to go flat out, pressure on the B2B trade and manufacturers in many sectors is likely to be enormous in this country too. If that happens, we must wait and see whether there will still be time to rethink our own eCommerce and (in particular) shop concepts and to adapt them accordingly. Against this backdrop, at any rate, Amazon CEO Jeff Bezos will never tire of trumpeting his formula for business success to the market, time and again: “Your profit is my opportunity.” A proclamation that he has already turned into reality once, when he set the book trade on its head.

#### Is Amazon revolutionising the B2B trade?

Amazon itself says that it intends to use AmazonSupply to revolutionise the way companies procure goods and services in the coming years. What’s your opinion? How will the involvement of this trading giant impact B2B eCommerce? Talk to us about it.

Georg-Friedrich Blocher will be glad to receive your call (+49 8382 272-193) or email (georg.blocher@tanner.de).

## LATEST FROM THE MOBILE FRONT

More and more companies – including B2B enterprises – are opting for the wide-ranging possibilities of mobile internet usage. Dethleffs, the motorhome manufacturer, and the Hoffmann Group, a global corporation that trades in quality tools, are using mobile applications as a channel for communicating with their customers. We present these two companies’ apps on this page. Both projects were carried out by TANNER AG.

### “Go On Holiday” app with Dethleffs GmbH & Co. KG

Dethleffs has published a free iPhone app for campers (and others) with useful tips on travel in various European countries. For example, the app is helpful regarding traffic regulations in all the countries that you will pass through during your journey. You can learn everything about speed limits, road tolls and other provisions of traffic law such as rules on driving with dipped headlights. Several suggestions from teams of students who took part in the fourth TANNER college and university competition are also implemented in this project. In 2010, their assignment was to develop an online presentation of international travel tips for Dethleffs.

### Hoffmann Group’s catalogue goes mobile

The Hoffmann Group’s new product catalogue has been available since 2012. This, the 43rd edition, lists over 5,900 new items. Including its own GARANT premium brand, the company offers more than 55,000 quality tools from the world’s leading manufacturers. For the first time, QR codes have been added to the catalogue. With the help of the specially developed Hoffmann app, they provide seamless access to GARANT ToolScout, a tool for calculating cutting data, and to the Hoffmann Group’s eShop.

Georg-Friedrich Blocher of TANNER AG assesses the launches in these words: “These multimedia offerings for customers point the way to the future, not only for the two companies but also for us as their implementation partner.”



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**Printing:** Druckerei Kling  
**Picture credits:** Title page: einsnase / photocase, p.03: CLAAS Saulgau GmbH, p.04/05: Oetiker Group, p.08: Scanrail/Fotolia, p.11 zettberlin/photocase

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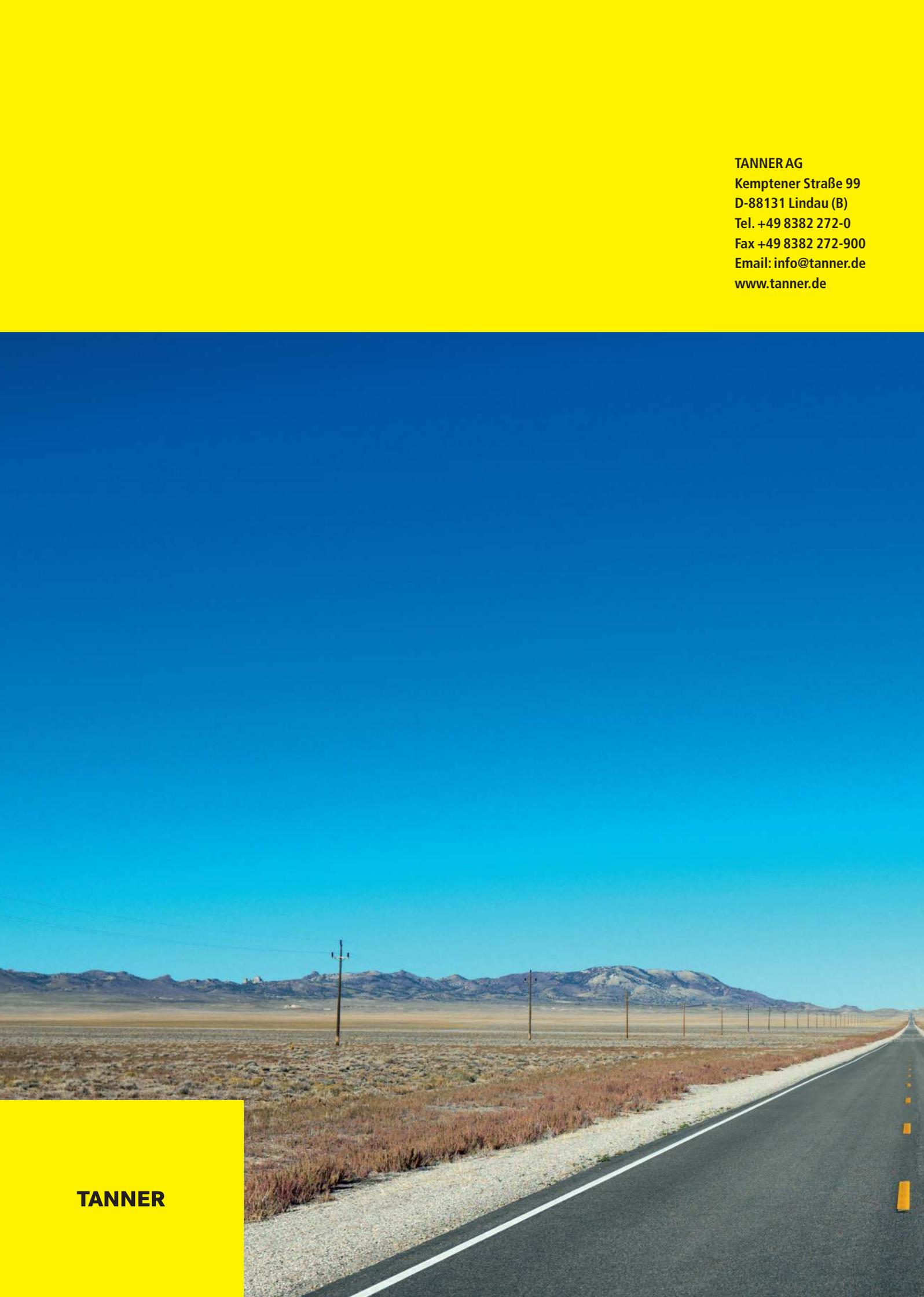
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