30TH YEAR 01/2017

ABZ

OPEN-SOURCE PIM AND NEW CATALOGUE FOR ASV STÜBBE

FAST-TRACKING AS-BUILT DOCUMENTATION

TANNER RELOCATES

CONFIGURABLE DOCUMENTS

CONTENTS 01/2017

EDITORIAL

TANNER AG relocates! After 17 years we decamped from Kemptener Straße at the end of last October and set up shop again in Lindau, only five minutes' drive from our previous location. We were looking forward to moving to a new company building, which now offers us long-term planning reliability as well as financial independence. Just drop in and see us! You can find further details about the relocation process in the very first article.

In this issue you can for example also learn more about the open-source PIM system for ASV Stübbe and discover the challenge presented to TANNER AG by KSB Aktiengesellschaft.

I hope you enjoy reading this issue.

Stefan Kügel

A BIT ABOUT OURSELVES: TANNER HAS MOVED TO A NEW HQ AT THE LINDAU SITE

At the end of October 2017 TANNER AG in Lindau moved to a brand-new building only five minutes' drive from our previous location. This HQ has excellent traffic links to the motorway and local public transport system. This ensures we remain readily available to both customers and staff just as before. Otherwise however, there have been some changes for the better.

"New company premises always offer the opportunity to learn from experience with existing work environments, to face up to new requirements in terms of modern-day working and to so ultimately create optimised work conditions", was the pleased comment from Chairman of the Board Stefan Kügel.

Stefan Kügel explained that these options could no longer be fully satisfied in the firm's previous building due to a fact that was probably not generally known outside the company: "At our last HQ we were merely tenants. We now own the new property." The positive effects of this step are obvious: long-term planning reliability and financial independence.

With a floor area in excess of 2200 square metres over four floors, the building affords staff sufficient space to concentrate on their duties. New network technology coupled with a mix of open-plan offices and numerous project and meeting rooms offer the flexibility that is indispensable for agile project work at all times. Modern air-handling ceilings, ergonomic workstations and the company's own canteen additionally ensure an attractive work environment.

It goes without saying that the property meets current energy efficiency standards while also including a photovoltaic system on the roof.

And the in-house crèche wasted no time in unpacking its toys at the new building. The 30 nursery-age children could hardly wait to try out the newly equipped facilities on the ground floor and the outside playground.

Facts and figures for the new HQ at a glance:

Site:	Innovationscampus Lindau Von-Behring-Straße 8A 88131 Lindau
Telephone No. (no change):	+49 8382 272-0
Floor area:	2220 m²
Floors:	4
Energy efficiency standard:	KfW 70

UNITING AUTOMATION AND CUSTOMER BENEFIT

TANNER establishes an open-source PIM system and creates a new catalogue for ASV Stübbe

Bringing together data from different sources for automated catalogue production is a complex affair. This is particularly true when there are numerous product variants and the ordering process consists of multiple elements. As an international manufacturer of pumps, valves and instrumentation systems ASV Stübbe supplies complete solutions for the environmental, surface treatment, chemical plant engineering and metallurgy industries. Based in Vlotho/Germany, the company wished to streamline industrial product selection for its customers, above all where ordering combinations of products was concerned. At the same time it hoped to reduce the manual effort involved in catalogue creation and to automate catalogue production as far as possible. To accomplish this task the company decided to call in the catalogue and software experts at TANNER AG.

Data from different systems

Staff at ASV Stübbe originally used two systems to manage the data for the some 90,000 products from the valve and instrumentation segments. While master data and prices were stored in the in-house ERP system, additional product information such as media, images and graphics were found in the external PIM system Incony Anteros. The old catalogue only contained part of the product portfolio, not least due to the volume of data. The new publication however was to present a full picture of the range.

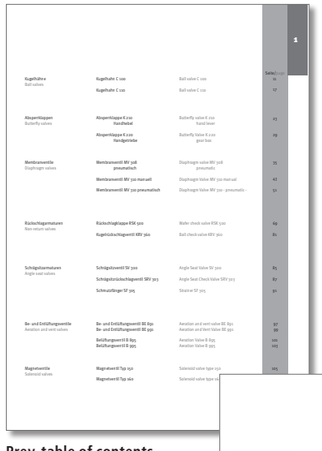
Open-source system allowed the new catalogue to be created within six months

As the basis for subsequent automatic generation of the catalogue, the data from the different systems first needed to be stored centrally in a PIM system in a structured manner. The choice of system fell here on the open-source solution PIMCORE in order to minimise the costs for the PIM system, to specifically adapt the data structure to the needs of the customer and to speed up the process.

"The open-source solution allowed us to directly set up the system for the customer at our company. The process then went very quickly, only taking us six months from setting up the system to generating the catalogue. This was possible because we really took control of everything ourselves. The result is a solution that is not only highly pragmatic, but also highly effective", comments Steffen Seibold, who was in charge of the project at TANNER.

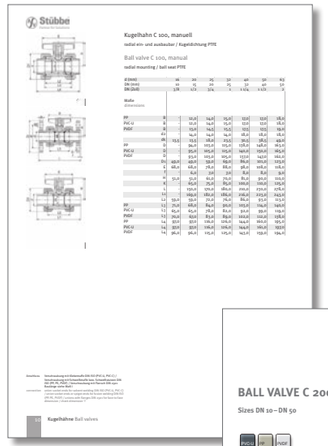
Data transfer and cleansing in one go

Originally the data was to be transferred from the different systems in a fully automated process. "During the project however, the opportunity of immediate cleansing on transfer presented itself. To do so, it was necessary to closely coordinate certain manual tasks with ASV Stübbe. This meant the system was supplied with information that was valid right from the start", explains Seibold. For cleansing the team at TANNER was provided with the data in the form of Excel spreadsheets.



Prev. table of contents

Updated table of contents



Prev. product start page

Updated product start page

Improved navigation and easier ordering through use of colour

The catalogue now looks more attractive overall thanks to colour printing and high-quality product photos. Customers are assisted here by a uniform colour coding scheme. For instance, on the overview and product pages standard valves are marked with a dark-grey bar and further options displayed on a light-grey background. It was also ensured that pages on which new products begin within the range can be immediately found when going through the catalogue. "We have enhanced the product start overall", explains Hack. "The relevant pages are visible at a glance thanks to the orange bar and large product photos. Additional information such as product benefits or links to the data sheets stored online can now be found more easily."

The team has also made the ordering process simpler through the strategic use of coloured elements. "We have highlighted the order numbers in the tables in orange. Customers now find it easier to locate and compile the individual ID numbers." The new catalogue additionally includes ordering examples that illustrate configuration of the order numbers for the individual product groups.

Modern, customer-friendly and offering automatic generation: a new concept for the catalogue

While work was under way on the data, a new catalogue concept was devised in agreement with ASV Stübbe. When developing the layout, attention also focused from the outset on making the catalogue more user friendly and ensuring it could be generated from the stored data. This involved for example optimising page layouts and page break rules to achieve the highest possible degree of automation. "We redesigned the article structure, made sorting in spreadsheets clearer and additionally simplified navigation for the customer using graphic elements", explains Gisela Hack, responsible for conception at TANNER.

"The section entitled 'Instrumentation' was divided into the headings of 'Control Technology', 'Measurement Technology' and 'Electronic Measurement Technology'. We simplified the tables of contents for the individual sections and took out any superfluous information. As customers of ASV Stübbe frequently order combinations of products, we paid special attention to ensuring they could easily be found in the new layout", comments Hack. The project included creating informative overview pages for the different product groups. They not only contain characteristics tables which can be used to directly compare individual products, but also page references to all product combinations.

Adaptation of the data model and development of an automatic publication path

The conception phase was followed by adaptation of the data structure in PIMCORE and development of an automated publication path to generate the catalogue in German, English, Spanish, French and Russian. Here the TANNER team created InBetween templates for the individual page types to define placement and formatting of the product attributes taken from the PIM system. XML files are exported from the PIMCORE system, loaded to InBetween and transferred to InDesign using the templates.

Pilot project offers an opportunity for cross-utilisation of data

"Setting up the PIMCORE system for the customer at our company was a successful pilot project", says a satisfied Steffen Seibold. "You can build on it and continue feeding the system with data." "We're very happy with the new catalogue", comments Tim Lohmeier, product manager at ASV Stübbe. "As the next step we'd like to use the new data pool for the automated generation of product data sheets. We also envisage the transfer of content for online applications."

Under one roof: TANNER conceives and produces a catalogue for Belimo

Whether icicles are dangling from the gutter or the sun is beating down outside – indoors, pleasant temperatures and controlled air exchange are guaranteed by products from Belimo Automation AG. This Swiss company develops, produces and markets actuator solutions for the control of heating, ventilation and air conditioning systems. This article describes how the Belimo catalogue was redesigned and produced.

Participation in "INKA" provides the impetus for a joint project

The impetus for the project was provided by Belimo's participation in "INKA", the B2B competition run by TANNER for communication media, in 2013. "We already knew on submission that our catalogue offered significant potential for optimisation. Following analysis TANNER supplied us with a profile of strengths and weaknesses which then confirmed this impression", recalls Dany Zahn, head of Technical Communication Europe at Belimo. "We thus directly instructed TANNER to come up with a new concept for the catalogue." Belimo gave TANNER an explicit brief here as the company already had a concrete idea of what it wanted for the new catalogue.

Catalogue concept based on the customer's viewpoint

The catalogue enables Belimo to market air damper actuators as well as valve-actuator combinations. Such combinations are used for example to regulate the inflow of water. As these products only function when used together – the valve is controlled by the actuator – they are generally purchased in combination. In previous catalogues products were organised by actuator. "In the new catalogue we wanted to structure the product pages on a valve by valve basis", explains Dany Zahn. "For instance, our customers need a two-way valve for a pipe with a nominal diameter of DN 15. Once they have found the valve, they then look for the right actuator – and not the other way round."

Concept impresses with its functional and coherent design

"We submitted a concept that lets customers find a valve-actuator combination based on their individual application far more easily", comments Dr. Juliane Kraus, in charge of conception at TANNER. Although the new catalogue is more compact than the previous one, the improved structure means it contains more technical data. "Every type of valve is displayed on a double-page spread which shows users the key technical information – both for the valves and the actuators."

The concept impresses not only with its coherence, but also with the functional design of the individual elements. Kraus: "The colour orange for example has been used for both navigation and ordering. This coloured highlighting helps users intuitively configure the order numbers. Technical data and further information appear on a grey background." While users in the old catalogue were pitched from one section to the next because they followed each other without a break, the start pages for each section have been improved by the concept both in terms of design and information and are also each provided with a table of contents.

Information at the beginning

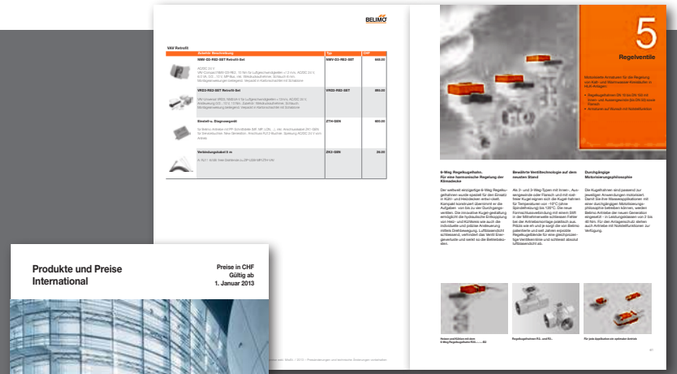
The main function of a catalogue is to directly take customers to the product they want. At the same time however it should also inform the user and reinforce the brand. "The old catalogue did not include any information about Belimo as a company", says Kraus. For this reason, it was not only the cover pages that were redesigned, but also image pages developed and created with information about Belimo to familiarise the customer with the firm.

Manual implementation of the catalogue

At the conception stage attention first focused on ensuring fast and simple generation of data from the PIM system. "We however opted for manual implementation of the first catalogue based on the new concept – on the one hand, so we could try the concept out, and on the other, to save time", explains Zahn. The concept was further streamlined by Belimo beforehand to dispense with another few pages.

The team at TANNER were supplied with the data for the catalogue in two Excel spreadsheets containing structure and product information. When the catalogue was created in InDesign, formulae were used instead of specific prices. This allowed the current prices for each country to be automatically loaded using a script shortly before completion of the catalogue.

"The catalogue went down really well with customers", comments Zahn with satisfaction. "We'd now also like to have the quality of the catalogue confirmed in the "INKA" competition. Unlike last time round, we're hoping this year to come in as one of the best."



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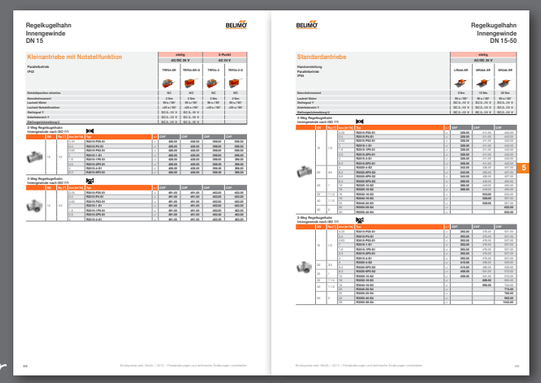
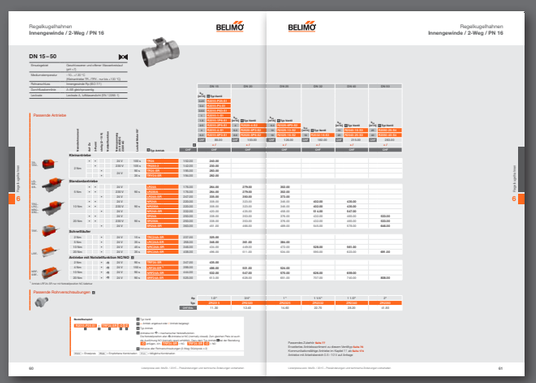


View of actuator

After



View of valve

FAST-TRACKING AS-BUILT DOCUMENTATION

TANNER revises documents for KSB

Construction of the coal-fired Maasvlakte Power Plant 3 (MPP3) near Rotterdam was truly a mega project. Since being commissioned in 2015, this installation with a gross capacity of 1100 MW produces enough electricity to cover seven percent of the demand for electricity in the Netherlands. To do so, it requires high-performance components such as those available from KSB Aktiengesellschaft in Frankenthal. This manufacturer's pumps and valves can be found worldwide in more than 1000 power plants. Inside the MPP3 plant two of the company's boiler feed pump units ensure that condensed feed water is returned to the boiler. Following supply of these units the next step was to swiftly amend the documentation for the Client in line with the as-built status.

"As is the case with plant engineering, various modifications and additions were made to the pumps in the course of the project", explains Holger Ratz, the KSB manager responsible for creating contract-related documentation. "Producing these documents in a short space of time presented a major challenge, above all for our suppliers."

400 documents in two months

The over 400 individual documents making up the documentation supplied to the Client had to be restructured and updated to the latest status within two months. At the end of the process all documents were to be available in German, Dutch and English.

Following its satisfactory experience from previous contracts the pump manufacturer got in touch with TANNER AG about the project. Physical proximity also played a role here. As TANNER's branch in Graben-Neudorf is only 35 or so miles from Frankenthal, a contact person was available on site whenever needed.

Challenge of supplier documentation – jointly mastered

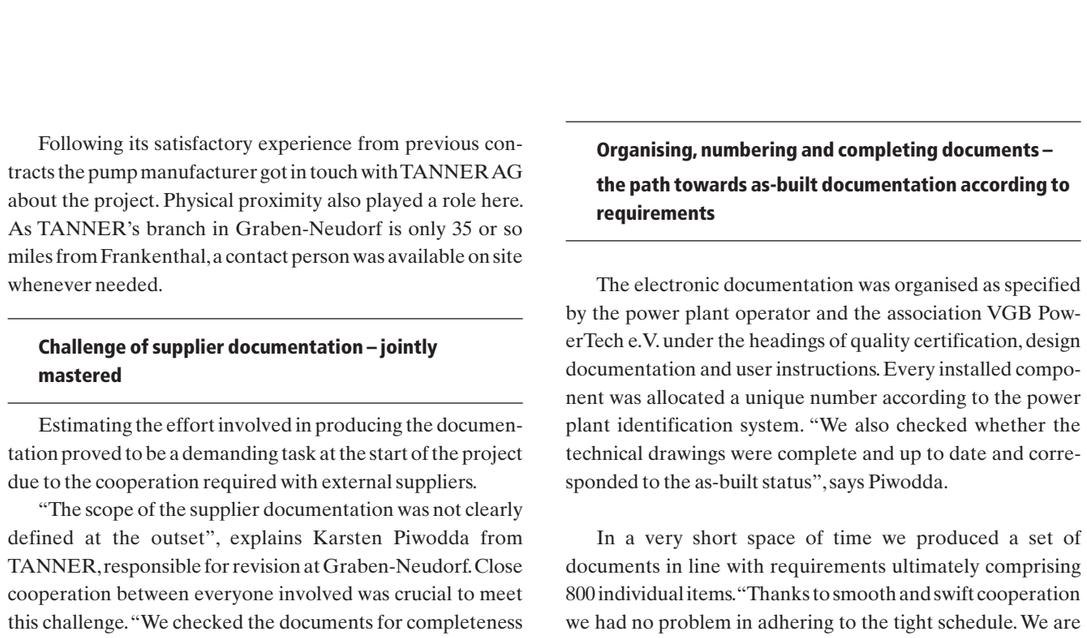
Estimating the effort involved in producing the documentation proved to be a demanding task at the start of the project due to the cooperation required with external suppliers.

"The scope of the supplier documentation was not clearly defined at the outset", explains Karsten Piwodda from TANNER, responsible for revision at Graben-Neudorf. Close cooperation between everyone involved was crucial to meet this challenge. "We checked the documents for completeness and augmented them together with KSB", comments Piwodda. "KSB had asked the suppliers for all documents such as declarations of conformity and test certificates and made them available to us in blocks."

Organising, numbering and completing documents – the path towards as-built documentation according to requirements

The electronic documentation was organised as specified by the power plant operator and the association VGB PowerTech e.V. under the headings of quality certification, design documentation and user instructions. Every installed component was allocated a unique number according to the power plant identification system. "We also checked whether the technical drawings were complete and up to date and corresponded to the as-built status", says Piwodda.

In a very short space of time we produced a set of documents in line with requirements ultimately comprising 800 individual items. "Thanks to smooth and swift cooperation we had no problem in adhering to the tight schedule. We are highly satisfied with the result and are already working with TANNER on three other documentation projects", declares Ratz.



Structure and content of as-built documentation: Volumes 4, 5 and 6 were amended by TANNER.

CONFIGURABLE DOCUMENTS

Individual configuration of documents and publication in different formats – these options are increasingly in demand where technical documentation is concerned. But does this always call for a (new) content management system? And how can specialist departments be involved in creation without major effort? This article describes simple ways of ensuring configurable documents.

XML as the basis

The level of editorial work is increasingly going beyond what is financially viable, above all for companies which need to continuously produce content for specific target groups or projects and to publish documentation. This calls for scenarios where specialist departments outside actual editorial teams are able to produce documentation quickly and easily and further individualise it themselves.

XML is a suitable vehicle for such requirements. The process begins by creating a master document with the content for all products and variants. All the user now has to do is select the individual text modules needed for the required documentation.

Selection of the individual text modules is performed "manually". In certain cases however it can be further automated by coupling the modules to parts lists or product configurators.

Method 1: Parts list as the guiding structure

With machines or systems that are largely based on functional assemblies, the relevant parts list can serve as the guiding structure for configuration of the documentation. To this end the XML modules are categorised further: either with metadata or assembly numbers. This allows every text module to be allocated to a machine assembly. If the parts list for a customer contract is now read in, the system will then only select and export for the documentation the text modules whose associated assemblies are contained in the parts list. If required, the standardised text modules can now be further individualised by the specialist department. This not only significantly reduces any errors in the documents to be supplied, but ultimately also cuts costs markedly during the overall process.

Method 2: Product configurator as the guiding structure

Products are frequently configured from numerous options and variants. This is why many companies make product configurators available to their customers. Such product configurators can be used according to the same principle as for the procedure described above with the parts lists for the individual compilation of product-specific documents. Here too the XML modules are categorised by metadata and allocated to the individual variants and options. They are then filtered in a graphical interface and configured into product-specific documentation.

Flexibility from creation to publication

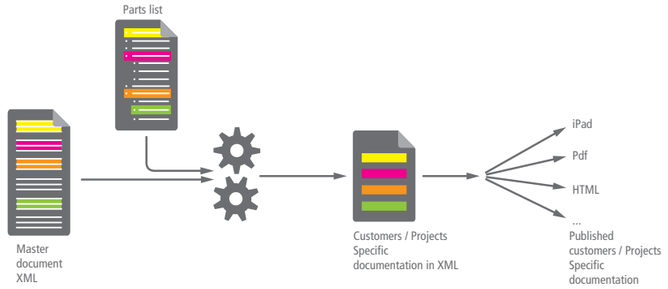
During the entire process, from the creation of content by the editor to final publication, modular and configurable, XML-based documentation can always be adapted to new tools or requirements. This in particular applies to the use of established standard rules such as the data models DITA and PI-Mod. Available systems like Microsoft SharePoint or a PDM system are well suited to content management purposes.

Possible scenarios from Sales

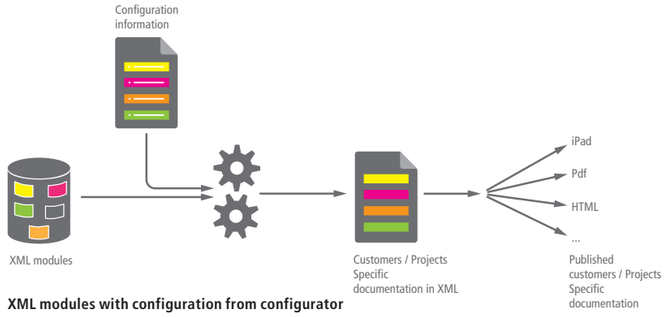
The procedures described above are not only relevant to technical documentation. It is frequently also possible for instance to make complex sales processes more efficient, as demonstrated in the following example.

A large industrial firm needs its Sales department to produce customised technical specifications quickly and easily. Documents are to have a standardised structure, without the need to continuously train every sales associate in how to do so – involving cost and effort.

To fulfil this requirement, a central editorial team first creates the XML modules for all variants, options and variables of the product portfolio and characterises the modules with metadata. For the release process the content is published as PDF files and submitted to the relevant specialists for checking. Following release the content is then available in a central pool.



Master document with configuration from configurator



XML modules with configuration from configurator

This pool now serves as the basis for future configuration of all product- or customer-specific documents by the relevant departments – in our example Sales. The department concerned can now configure a Word document based on the existing standard texts and the specific sales configuration. Marking in this document indicates fixed standard content and specific content which can be changed. The project manager checks the content to be edited, amending it in each case where necessary. Such adaptations can also be reincorporated in the standard if required. The use of MS Word ensures that no special editorial skills are needed to implement customer-specific changes.

New wine in old bottles?

The above methods and functions have been used successfully in many companies for more than ten years. To date however it is mainly technical editorial departments with specialised content management systems that have benefited here. The approach described above allows technical editorial teams to use existing systems and to swiftly supply both internal and external target groups on a standardised and individual basis.

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