

Mail Order Bride: RoboCatalog Is a Well-Oiled, Slick-Skinned Data Transformer

By Ron Roszkiewicz

Mail order catalog and insert production is a unique beast. It's an amalgam of advertising, product brochure, company branding and a walk through the shelves and aisles of a virtual store. While the Internet might be a new source of customers for catalogs and flyers, it certainly has not replaced the print vehicle, at least among traditional merchants.

Mail order companies seem to exist at both ends of the automation spectrum, with most residing at the low, analog end. Mail order merchants often focus on the product and their stores and leave catalog production up to specialists. For catalog developers, one way to bring in automation is through outsourcing. Outside agencies and design companies provide branding, data repository and layout services and relieve the marketing company of the day-to-day management of creative personnel and technology.

Whether or not the work is outsourced, comps and proofs, festooned with sticky notes and marker smudges, continue to survive even though the waxer and X-Acto knife have long been made obsolete by technology. What has not changed over the years are the primary issues that face publishers in time-sensitive environments:

- data control and integrity for new and pickup work,
- the need to streamline the review and approval process and
- an efficient and cost-effective way to make artists' alterations.

The answer at the high end, inhabited by such companies as Stibo and Pindar, are comprehensive database publishing solutions priced too high for many small to medium catalog marketers or marketing departments. At the low end, an assortment of XTensions and plug-ins connect layout programs such as QuarkXPress and Adobe InDesign to databases and DAM systems. Recently a new contender has entered the mix with a feature set that rivals the high-end systems but without their high cost and high maintenance. The system is called RoboCatalog and is the subject of this review.

What's in the Box

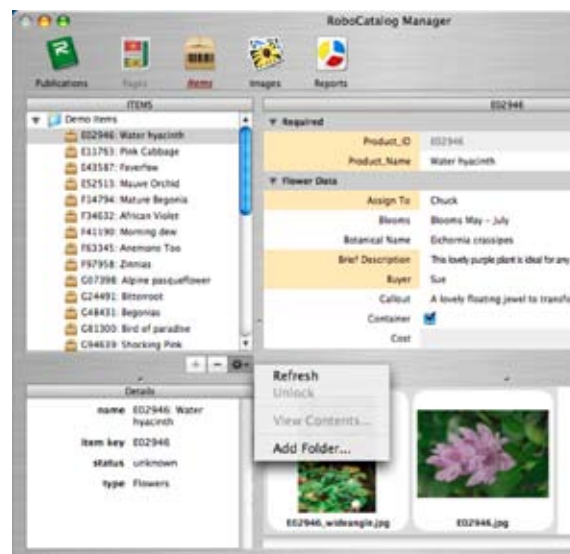
RoboCatalog consists of a suite of XTensions, plug-ins, a middleware application and client software. The two main applications are RoboCatalog Manager (Manager) and RoboCatalog Builder (Builder), which are the environments with which designers and approvers will have

primary contact. Other applications, such as RoboInform, synchronize data between Xinet SQL databases and RoboCatalog's built-in SQL database. RoboCatalog Filer synchronizes low-resolution image creation and storage between these two databases.

RoboCatalog Manager

The Manager application consists of three windows: a login window, the main window and the browser window. Although an XTension is in development for QuarkXPress 7, the current Manager only supports InDesign CS2 and CS3 on Macintosh (OSX) and Windows (XP and Vista). Manager is where automated templates are created and content stored remotely or locally is accessed. Manager is the primary input mechanism for specifying essential catalog parameters such as user names and permission, age size, number of pages and so on (*Illustration 1*). The main window of Manager is divided into multiple panels. On the left are listed icons for accessing objects stored in the database. Along the left side is a list of pages and pairs that reflect the options for template layout. The objects from the database arrive with their own unique identification numbers and any metadata that was associated with

RoboCatalog Manager with RoboCatalog Manager Application Modules Dashboard.



the project in the administration panels. Information assigned to each image, text block or price can have metadata values that are read-only or dynamic.

On the right side of the window is a library showing templates and documents that act as the source material for layout, editing or conversion into RoboCatalog templates. RoboCatalog recognizes InDesign's native format, as well as PDF files.

Also included on the icon dashboard is a Report button. While there is no built-in report generator in RoboCatalog, custom programming can be provided that transforms RoboCatalog's trapped usage information into usable information.

While the automation title might imply a black-box connotation, RoboCatalog is not a hands-off system or one designed to talk machine to machine. In fact, the user interface is very much iTunes and the visual clues provided for layout elements demanding attention are ergonomically appealing. User interface is as important as the gears and levers under the hood, and RoboCatalog balances the two well. This is important because although the IT department will in many cases manage the main server(s) that interact with RoboCatalog, IT does not want to be responsible for how the stored elements are used or defined. All of these chores are pushed back at the creative departments where the work is done and where the responsibility should be.

Consequently, the integrity of the source data can be managed in a centralized location and check-in and check-out happens through RoboCatalog's SQL link. The team authorized to have access to this information can be defined by the project leaders and changed whenever needed.

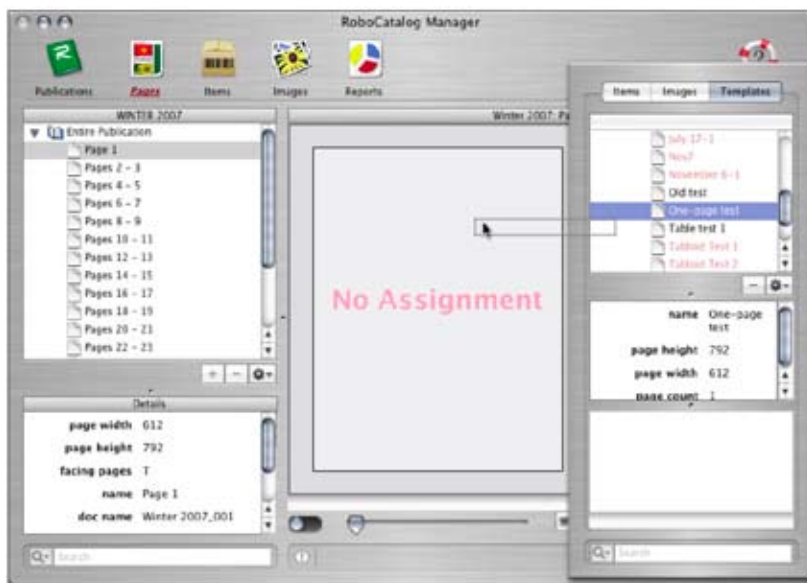
Security. Robocatalog does provide administrative control over database permissions and access. Using the Manager application requires a user name and password in addition to knowledge of the data path of the assets. Both user name and path are cached.

Permissions are particularly critical during the Review cycles. Manager collects the changes made to pages and page elements and lists them as unique items, along with the before and after result of the change. Users with Administrative permissions can accept or reject these changes on a case-by-case basis, with the result immediately synchronized throughout the publication.

Page elements can also be protected from inadvertent changes. This key feature, to protect and unprotect an element, is available by clicking on it and accessing the Protect and Unprotect choices from the contextual menu (right-click).

Browser window. The Browser window provides a view into the asset database and simplifies the search for and use of templates and images. Previews of publications and images are provided to allow for searching by file name and thumbnail. Items can be dragged and dropped from this view onto the Manager page.

Publications Mode. Publications are defined in Publications Mode. This, too, can be treated as an administrative function and with the parameters passed along



to the layout artists. Once the publication parameters are set, Define can be selected from the fly-out menu. This turns the center panel of the Manager window into a totally interactive area and pages, spreads and signatures can be moved and extracted to suit the intended use. The total flexibility in how pages and spreads are moved around well suits the catalog business, where some sections might be in color and others in black and white. A particular section might be extracted and used independently as a mailer or last-minute changes brought on by product availability or unavailability could dictate a change in page flow or product mix.

Assignments and Relationships. Page-layout applications typically offer functionality for grouping together items. This partially protects the item from “dropping on the floor” and can make layout of similar items more efficient. In RoboCatalog there is a notion of Relating/Unrelating and Assignments.

A related set of items constitutes a Frameset. A Frameset is tracked as a set of objects and values that are typically related by product identification. So if a product is replaced in a Frameset, all of the associated SKU, body copy and pricing information would also change to reflect the new listing. No need to manage this manually and risk costly errors.

An Assignment is the (re)placing of an image from the RoboCatalog server onto an InDesign layout. Updating New Assignments synchronizes templates and servers to reflect the change(s). If an image is part of a Frameset with other related items, they too might change with the new assignment.

To this end, RoboCatalog comes through with a truly efficient solution. Simply identify InDesign native or PDF files in RoboCatalog Manager and initiate the transformation. All of the page parameters and page elements are deconstructed and listed. From that point on, the pages respond like any original RoboCatalog page. At this point the pages can be edited or converted

The left panel lists publications and the contents of publications. Pages allows for building pages with templates, images and other items.

into templates for use in making the next RoboCatalog generation of a publication.

Update requests are collected by Manager and listed. Users with administrative permission can reject or accept any or all of the listed changes.

NOTE: So far most of the information about RoboCatalog presented is about creating catalogs from scratch. In this case, RoboCatalog enhances the host application (InDesign) and brings a level of intelligence and security to the workflow. The first area of concern for most businesses is how to deal with legacy data. Since so many of the publications will use pickup designs and products, it's important for a product such as RoboCatalog to provide an easy transition to their unique workflows. This transition does not require expensive professional services support.

RoboCatalog Builder. Builder is an InDesign plug-in (XPress is coming soon) that allows checking out of designs and layouts from the server. It manages the synchronization of the live and stored pages so the user can be alerted to elements that have changed on the layout. Builder also provides a way to lock elements at the layout level and prevent inadvertent changes. In Builder, page elements can be tweaked and changed. Assignments for element and page location can be changed and synchronized among all users. Builder can also spawn a PDF file for review and, using the RoboCatalog tools, these review copies can be annotated in Acrobat using the XDF file as a commenting layer.

RoboCatalog Administration. Great care has been put into the specification of the administrative functions of RoboCatalog.

RoboCatalog Server. RoboCatalog server is installed to manage all product and catalog information. Permissions and control over the metadata and file parameters are available through an administration function in a browser window. Backup options are also available through this GUI.

Licensing and Pricing. The two RoboCatalog packages currently available are the five concurrent user license (\$60,000) and the 10 concurrent user license (\$100,000). A hosted a la carte approach is also available. Custom programming is available through RoboCatalog for interoperability with external database systems. All sales and integration is handled through **IO Integration**.

Integrators Professional Services and Support

Perhaps the most important aspect of any system adoption is the quality of the service and support that will follow. RoboCatalog has chosen to ally itself with IO Integration as the primary installation, professional services and support organization. On paper this looks like a good fit because of IO Integration's knowledge of the system of RoboCatalog's other partner, Xinet, a well-respected DAM system vendor with advertising agencies. RoboCatalog depends on Web Native Venture, FullPress (for OPI, which lives on in the RoboCatalog workflow as an efficient transport



solution) from Xinet for serving RoboCatalog page elements and templates.

In most cases, RoboCatalog comes in as a complete solution for a company accustomed to handling all of the graphic arts chores manually. These solutions are built on the use of InDesign, so RoboCatalog's lack of support for QuarkXPress is not a problem.

IO Integration provides the full menu of professional services to support RoboCatalog installations. Typical services include training, installation support, hardware procurement and system monitoring. In the case of new installations, the professional services price for new server hardware, metadata setup support, training and so on will double the price of the system, which is typical of industry standards for new solution installs. According to Mike Holt, co-founder and CEO of IO Integration, several pending deals involving RoboCatalog look promising.

Importance of Metadata

RoboCatalog depends on items being identified through manually entered properties and values. Nowhere in the user guide or application is the term *metadata* used. Of course that is what they are and in fact one of the key values of the suite is support for Adobe extensible metadata platform (XMP). Some metadata is read-only, while other properties are fully editable. The main point is that since RoboCatalog in its current incarnation relies on other repositories such as Xinet Venture for asset storage, a certain amount of metadata compliance is necessary for consistent searching and data control. Xinet does support XMP and in this sense fits well with RoboCatalog's unstated and similar objectives.

RoboCatalog is all about setting up the conditions so that automated processing can take place. The expectation is that there will be far more users of RoboCatalog Manager viewing and editing pages than actually laying them out, and the users' level of understanding about the way the application is set up will be minimal. To

Items appear in their template assigned locations or are edited and replaced with different items.

achieve this level of simplicity and automation requires an extensive low-level control apparatus that manages user permissions, mapping of data from one database to RoboCatalog and the setup of metadata schema values. Most of this configuration activity happens in the RoboCatalog System Administration panels. Preparing the initial parameters and understanding how to maintain them is clearly best left up to the local IT department and integration professionals. They can interpret existing workflow details and metadata goals into the necessary parameters so that the new workflow truly replaces the previous one, with few surprises.

RoboCatalog System Administration Panels: A View Under the Hood

To finish our review of RoboCatalog, we'll take a brief tour of the important System Administration section.

Home. Home is where the system and version numbers are identified and running time is monitored.

Users. Project members, access and read-and-write permissions are defined in the Users section.

Item Attributes, Lists, Maps and Items. Item Attributes, Lists, Maps and Items are critically important to the fluid interchange of data from external databases and RoboCatalog's internal MySQL database. For example, all elements must be identified by a four-character code in the system, which is identified here. It is also the place to define the underlying structure for business rules and the controls for inline graphics.

InDesign. Currently InDesign styles are stored here.

Locales. Also known as Editions, this is important for creating different language versions of the same document. Changes made to one version can be used to flow through as many as 300 versions automatically.

System. Reporting of basic system and user activity. Does not replace the reporting done by external systems for project management or project cost tracking.

Conclusion

It would be naïve to expect the publishers of telephone directories, auto trader listings, real estate multiple listing services and others demanding data integrity and automation to breathe a sigh of collective relief after reading this RoboCatalog review. They are not the target audience for RoboCatalog. Instead, RoboCatalog is targeting the small-to-medium catalog design and development groups for whom quality of presentation, system cost and maintenance are critical requirements. This should not imply that the architecture used in this implementation doesn't scale; scaling appears to be more a matter of additional hardware and not different software.

The system is designed for ease of use for the day-to-day and sporadic user. Relying on the ubiquitous iTunes window design was a good decision and in general the system is very approachable. Users should not venture into certain under-the-hood areas without guidance, but these areas — the domain of the IT department and the integrator setting up the system — are generally hidden from view. Even so, it

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seems that with some training even these hallowed sections could be maintained by mere mortals. The issue is that just like naming conventions for products and SKUs, it's smart to rely on the experience and judgment of others to lay the groundwork for the system.

The same is true for metadata. While not identified as such, many of the parameters labeled as properties, IDs, values, validation values and others are metadata and as a group are a metadata schema. I don't believe the word *metadata* is mentioned anywhere in the documentation or Web site, but that's OK since the word can be off-putting. It might also be OK since the RoboCatalog system is designed to pass through metadata and, of course, their schema from external databases. RoboCatalog currently has a seamless database-to-database relationship with Xinet Venture and that makes it indirectly a supporter of Adobe's XMP. For the purposes of their processing and business rules, it's no big deal. However, in the not-too-distant future, metadata will become a force in the upstream reaches of design and RoboCatalog will likely have to redesign some of its system administration panels and aggregate all of the job-related metadata and job definition format (JDF) metadata into a dynamic custom schema or part of an industry-accepted schema.

A final word must be said about the ergonomics of the system and its accessibility. Most Macintosh users, when faced with a new piece of software immediately start mousing around, seeking out familiar menu touchstones to investigate. Part of the reason for the success of Macintosh over the years has been due to the consistent user interface guidelines most developers follow. It leads to a path that allows them to go from mousing to getting actual work done in a markedly short amount of time.

This has proved true even with powerful workstation graphics products released for the desktop. I mention ease of use because very often the person trained on a layout system such as RoboCatalog moves on or moves out not long after being trained. The new user will often be given the user guide and a weekend to get up to speed. With RoboCatalog, getting up to speed as a user (though not as an administrator) can indeed be accomplished in a pinch. The icon-based dashboard and window layout provide easy entry to a system that hides its complexity out of normal view. **TSR**