How Schneider Electric met digital customer requirements for their product catalog

PRODUCT CATALOG DELIVERY TO CUSTOMERS

For over 80 years, the Schneider Electric North America product catalog, the Digest, has been viewed as a best-in-class product resource by customers. The 1,000-page Digest was developed as a print-first document. In 2012, 175,000 copies of the Digest were printed and distributed at a significant cost to Schneider.

High publication costs along with a labor-intensive effort to update information caused many delays in delivering timely information to customers. While surveys indicated 87 percent rating the printed Digest as either excellent or very good, only 68 percent rated the online PDF at the same level. The online PDF version of the Digest was too slow to download and use, did not provide an effective search capability, and was not compatible with mobile devices.

"Putting out the Digest every three years was a complex and expensive effort and did not meet all our customers' needs," says Kevin Habel, global product manager for the MOTIF environment at Schneider Electric.

Moving to DITA XML authoring promotes efficiency

A few years earlier, Habel had achieved significant savings by migrating Schneider Electric's technical documentation to the MOTIF environment. MOTIF's foundation is based on the Darwin Information Typing Architecture (DITA), an open-source, extensible markup language (XML) that defines rules for encoding content so it is easy to reuse in multiple documents and output formats. MOTIF encompasses several PTC authoring and content management tools including Arbortext Editor, Arbortext IsoDraw, Creo Illustrate, and Windchill. In combination with specific workflow processes, MOTIF makes it easier for authors to structure, develop, manage, and publish content.

The challenge of a digital digest

With dozens of authors and product owners contributing content for more than 22,000 parts and products in one publication, it's easy to see why Schneider Electric's Digest is one of its most complex product catalog publications. Creating and maintaining a publication that contains over 1,000 pages of tables, detailed illustrations, simple descriptions, and rich technical content is a daunting task. Adding a requirement to make that same print and PDF information available in a responsive HTML5 design seemed unachievable. Fortunately for Schneider Electric's documentation team, Habel had already developed an environment that was perfectly equipped to handle the complexities of the Digest and enable it to feed multiple delivery formats from a single source.

In mid-2014, Digest project manager Mark Mitchell began work with Habel to leapfrog competitors and start delivering digital Digest content. But first Mitchell and Habel had to secure buy-in from Digest stakeholders. While there was widespread recognition that the existing publication process was difficult and expensive, moving such a high profile effort to the MOTIF environment carried risk. If the project did not go well and the publication effort failed, there would be costly consequences.

"Everyone wanted a more reliable approach," Habel says. "Mark Mitchell and I agreed that DITA was a proven foundation we could build on. We were confident the right pieces were in place and that the new Digest would be a hit with customers."

The one-year migration from the Framemaker authoring system to structured DITA included mapping the data, DITA and the MOTIF environment training, development of a print PDF style sheet, and many updates to product information.

Teaming up with content-delivery specialists' speeds implementation

Habel and Mitchell contacted Oberon Technologies to assist with the Digest project. Oberon had an established track record of working with organizations to optimize structured content for multiple channels, including mobile.

Consultants from Oberon Technologies recommended using Titania Delivery in combination with PTC's solutions for content creation to further simplify the digital publishing process in the DITA environment. Titania Delivery is a cloud-based portal solution that allows users to publish documents in multiple print and digital formats. The portal enables Schneider Electric customers to search and locate product information using any Internet-connected computing device. It also captures consumer feedback for ongoing improvements to the Digest.

Because of the complexity of the tables, graphics, and technical content that made up the Digest, Habel and Mitchell were expecting the digitalization process to take several months to complete. But with Oberon Technologies' expertise, the team was able to put the Digest online in responsive HTML5 layout in just 35 days.

"The idea of digitizing the Digest seemed overwhelming at the start," Mitchell says. "It was great when we were able to have all our DITA content transformed and available online for customers in just five weeks."

Turning the digest into a living document

Schneider Electric typically reprints the hardcopy version of the Digest every three years. The Digest was simply too large, complex, and expensive to consider updating more frequently. In its digital format, however, as-needed digital updates became practical, affordable, and timely.

With all Digest content available in responsive HTML5, Schneider achieved the final step towards a full end-to-end mobile solution for delivering this popular catalog. Writers improved their development and publishing processes and source content was migrated from page-oriented file formats to an open source topic-based format. With pre-built publishing templates, content authors are able to quickly update individual topics while having less concern about formatting. Publishing Digest updates to PDF is significantly more automated than before, and publishing to HTML5 is becoming a fully automated process.

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We can add content and fix errors in a timely manner," Habel says. "Responsive content on mobile has enabled us to leapfrog our competitors."

The company now releases digital Digest updates once each quarter. The digital format is becoming increasingly popular with customers who use its built-in search features to filter searches and quickly locate needed products.

"When we went mobile, all the lights came on," Mitchell says. "Everyone saw the benefits of using DITA XML and content management to create and publish this key document."

The project was so successful Schneider Electric presented the Digest team with a top global award during 2015. Other Schneider groups have asked Habel to assist them with bringing the same efficiencies to their publication efforts.

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This is just the beginning for us," Habel says. "We envision doing many more things with digital to help our customers with Schneider Electric buying decisions and product information."

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