PREPARING FOR BLOX TCMS

PREPARATION OVERVIEW

The BLOX team's first training visit is to work with your site's template master, but we will need to gather input from decision-makers in the newsroom. We will set up specific times to work with your template master, but our time while there is extremely flexible so that we will have more time to meet with decision-makers and work with the template master.

There likely will be a session or two with a BLOX TCMS team member who will need to discuss workflows and other topics with the site's decision-makers.

YOUR BLOX TCMS TEAM

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WHAT IS A TEMPLATE MASTER?

For a BLOX Total CMS site, the Template Master constructs the Adobe InDesign templates that are used in production. But that is the simple part of the job. The Template Master will be responsible for all of the following items:

As Template Masters you are integral part of those discussions and it will eat up some of our time. Plus, as you are important people at your sites, there will be the inevitable interruptions. But as Template Master you are about to become more important.

TEMPLATE MASTER DUTIES

Daily Template Construction: This takes a lot of time. The sizing takes about 5 minutes, the folios about 30 minutes, but creating all the paragraph, character and object styles takes about 40 hours. Likely the names of your current styles will be changing and so we need to document everything for the users. That documentation is really important and determines the ease of the first few nights of go-live with BLOX Total CMS.

Assisting with Output configuration: BLOX Total CMS for Adobe InDesign automates a lot of the output processes. This takes some effort. The Template Master may not actually do the configuration, but they have to be involved in it.

Editing the Translate Rulesets: The Translate Rulesets determine how the text and photos are formatted in Adobe InDesign. TownNews will provide a basic set. Your site's Template Master must create templates from scratch. There is no copying from old templates or converting templates using conversion software. There isn't as much editing initially. However for your site's Template Master, who already has what I hope is a working set of styles, we will likely recommend that they edit the

styles called in the rulesets to match the styles they are used to using. That remains to be seen. Even if your site is using Adobe InDesign doesn't mean that they are using it to its full potential. Translate Ruleset editing is an ongoing job. It starts when we first arrive, continues via gotomeeting training/support sessions in the following weeks, and never actually ends. The Translate Ruleset editing borders on programming in our own language. Sites can get great productivity gains with properly configured Translate Rulesets. Also the Translate Rulesets determine how content is returned from the BLOX Total CMS pages to BLOX Total CMS itself and then onto your website.

Creating Placefiles: This is a BLOX Total CMS unique item. These are both special types of text files and graphic files that can be imported at the time a BLOX Total CMS asset is placed on the page. The two classic examples are the headers used on Sports Agate pages and the column sigs that normally appear with columnist's columns. Placefiles are created in conjunction with the Translate Rulesets. They are totally optional, but like the Rulesets themselves, they provide a lot of productivity gains.

Producing Snippets: Now it is getting serious. As with the Translate Rulesets, this is a never ending job. Snippets are like library items in QuarkXPress and Adobe InDesign, but our BLOX Total CMS-based snippets add an extra layer of intelligence that again help the newsroom gain productivity. While onsite, we will show you the basics of creating snippets, but you won't actually make the first working set until after the Template Construction for the daily publication is complete. Don't jump the gun on this. We will eventually need snippets for generic design elements for story packages, and snippets to replace what you now use as Master Pages or as separate template files for unique pages or sections of pages. Snippets are also needed for everything that you currently have in Libraries or off in the pasteboard of pages. You could easily spend another 40 hours building snippets, but like Placefiles, they are technically optional.

Template Construction for other products: This might just be weeklies or tabloids, but particularly those products with different sizes. This won't be done until the daily is complete for a multitude of reasons.

Learning the System: For all of our sites we generally have a technical contact who handles the appliances, a website contact that handles the website itself, and then we have the Template Master. For day-to-day operation with the newsroom, the Template Master tends to be the most knowledgable about how the system works.

Testing: Testing. Testing. Did I mention testing? This is vital. Before we return for user training on our second visit, you should have been able to produce every page in the daily product. There should be no surprises come the first day of training. We would rather have the testing complete for the first day of training than hundreds of snippets.

Don't be worried: Yes, it is a lot of work, but over the first few months of production the site will gain that time back with productivity gains.

Lonely Template Master: Normally the Template Master is a single individual at a site. This is because we need to limit the editing of Translate Rulesets to a single individual at a time. This prevents one person from undoing something that someone else did. The Rulesets and the Adobe InDesign styles that they call get created simultaneously. And then they both have to be tested to verify that they work as intended. The logistics of multiple people doing that are not insurmountable, but we've never had a site follow through with multiple Template Masters. Sharing knowledge is great, but in practice, the work is hard to divide because for certain types of assets you have styles being created and documented, Translate Rulesets edited, Placefiles created, snippets produced, and then all of it tested. We will, however, help you with division of labor ideas.

What's Needed to Start: An outline of the hardware for training stations will be given to the site during planning for training. The training stations need to have Adobe InDesign installed. TownNews will help set up BLOX Total CMS on these machines. These machines also must have your fonts installed.

We need network access to the appliances and your file servers where existing graphics are stored.

We need access to your current pagination system or at the least the pages and the pagination application used. In practice, the Template Master usually ends up with their existing workstation and a second one for the BLOX Total CMS development work. If there aren't going to be new workstations, it can be the same one. But the Template Master needs to look at the old and the new and switch between them. A second machine is technically much easier.

We need printed samples. During the couple of weeks designated for the Template Master to produce the items above, there will be online training support sessions with us. So that we can communicate on what is to be produced, it is helpful to have two copies of the printed products. A week's worth of the daily product and a single of any weeklies. The Template Master will keep one set and we will take one. When we are working online together you can say something like "How do I produce that info box used on Nov. 3 on A7?" We will be able look at the page and know what you are talking about.