

Opsera helps the Royal Society evaluate Journals Production Tracking Systems

Opsera's senior publishing consultant and one of our technical architects guided the Royal Society through defining their requirements for a journals production tracking system and helped them run a tender to evaluate potential products.

The Challenge

The Royal Society's journals production team tracks articles and issues by entering information into a series of Excel spreadsheets. People spend a lot of time maintaining the spreadsheets, yet they still do not support many core production activities, including schedule management; transferring files to/from suppliers. Even management reporting is time-consuming and prone to errors.

The team therefore wished to find a journals production tracking system that would reduce the administrative load associated with manually capturing article information, transmitting files and sending standard emails, and would improve the completeness, accuracy and ease of management reporting. In addition, production managers wanted to review overall production processes to see if there were opportunities to improve the way things were done as a whole.

Our Approach

First, Opsera's publishing consultant facilitated a workshop with all Royal Society journals production staff to review their current production processes and identify opportunities for improving the overall process. This discussion not only resulted in some tangible decisions, but also contributed to defining what the production tracking system should do.

Then, we compiled a detailed matrix of the functional requirements for the tracking system, and brought in one of our technical architects to complete the definition of technical requirements. We used our understanding of the requirements to build a conceptual diagram of what the technical architecture of the system should look like.

We then performed a preliminary evaluation of 10-12 candidate systems or approaches, using the requirements matrix and architecture diagram to assess the potential vendors and their products. As a result, four vendors were short listed and invited to tender.

Opsera project managed a tendering process on behalf of the Royal Society, developing the ITT (Invitation to Tender) document, co-ordinating responses and customer reference requests, and organising and participating in the vendor presentations. We then summarised the strengths and weaknesses of the tenders in a report to help the Royal Society reach their decision objectively.



Our Client

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The Royal Society is an independent, charitable body which influences science policy, debates scientific issues with the public, and supports top young scientists, engineers and technologists. Founded in 1660, it derives its authoritative status from its long-established pedigree and the calibre of its 1400 current Fellows and Foreign Members. The Royal Society publishes seven journals, covering the biological and physical sciences, as well as the history and philosophy of science.

The work Opsera did for us was terrific. They contributed more than we expected - in addition to project managing the tendering, they really helped to bring clarity to a complicated issue. They know about publishing, and were easy to work with. I wouldn't hesitate to recommend them to other publishers wrestling with tricky technology decisions.

Charles Lusty, Senior Manager, Publishing Section

Solution

The technical solution architecture against which tendering products were measured used a multi-tier approach for scalability and future flexibility. Core workflow management, content management, scheduling and reporting services were shown on top of a content repository and database layer, with customised rules written into the business logic layer on top of the services to reflect the Royal Society's specific workflows and schedules, and their requirements for issue make-up and reporting.

The architecture allows multiple standards-based interfaces to be developed with upstream peer review systems and pre-press suppliers.

The presentation layer allows users to view article and issue metadata, content files, email templates and report results.

Results

During the workshop, we identified and agreed four 'quick-wins' - things that could be changed within the production process to improve speed and efficiency, and which did not depend on the longer term arrival of the production tracking system. The implementation of these quick wins is underway.

The overall conclusion of the tendering process was that none of the existing production tracking systems would fully meet the Royal Society's requirements at an affordable price.

However, as a result of the requirements definition and tendering process, the Royal Society has reached a more detailed understanding of what the system should do, and what the priorities need to be. This insight will be invaluable for the Royal Society in helping them determine how to proceed.

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