FINANCIAL PUBLISHING WITH MÉTHODE

DIGITAL PRODUCTIVITY

Mèthode: Do more. Do better.

Méthode harnesses powerful digital technologies to make the creation and delivery of critical report content faster, simpler and more reliable.

Rich, multi-channel portfolios of products can be served to multiple destinations without growing the resource base.

Automation and smart teamwork tools increase the productivity of analysts and reviewers by eliminating routine tasks and freeing them to concentrate on their content. The result is faster time-to-market, together with improved compliance and product quality.

As well as bringing new levels of productivity and quality to existing operations, Méthode makes it easy to add new report types and delivery options to keep pace with audience expectations and evolving technology.

Automating the routine

Many of the routine tasks that slow down conventional editorial operations are automated by Méthode.

- **Multiformat templates**: reports are preformatted for all output destinations from PDF and web page to mobile app, mailshot or newsletter. No manual adjustment is needed before publishing.

- **Smart notification:** team members are automatically informed of a task waiting for them – a report to review, a chart to update – by a message containing a direct link to the task. Teamwork proceeds smoothly, even across diverse locations.

- **Live content links**: real-time values and indices and standard content – disclaimers, company profiles etc. – embedded in documents update automatically without manual intervention.

- **Robot queries:** automated queries work in the background to keep users ahead of developments, from breaking news in specific areas to workflow progress.

Components - fast, flexible teamwork

Méthode reports are made up of components so that sections of a report can be worked on in parallel by several users at the same time. Each user sees a view of the whole product, updated in real time.

Once a component has been created, it can be saved and reused in other products. 'Fixed' components such as disclaimers and disclosures, are pulled into new documents from a central store, ensuring they are always correct and up to date.

Full Excel™ integration

Charts and tables created in Excel are seamlessly integrated into documents and pages with simple drag and drop actions from inside the editing workspace. Once inserted, Excel displays are live-linked, updating to the latest version with a simple click.

Optimizing performance

Méthode also incorporates tools for measuring and optimizing productivity.

A dedicated business intelligence application collects data on every operation that takes place across the platform and stores it in a data warehouse where it can be interrogated to answer questions like:
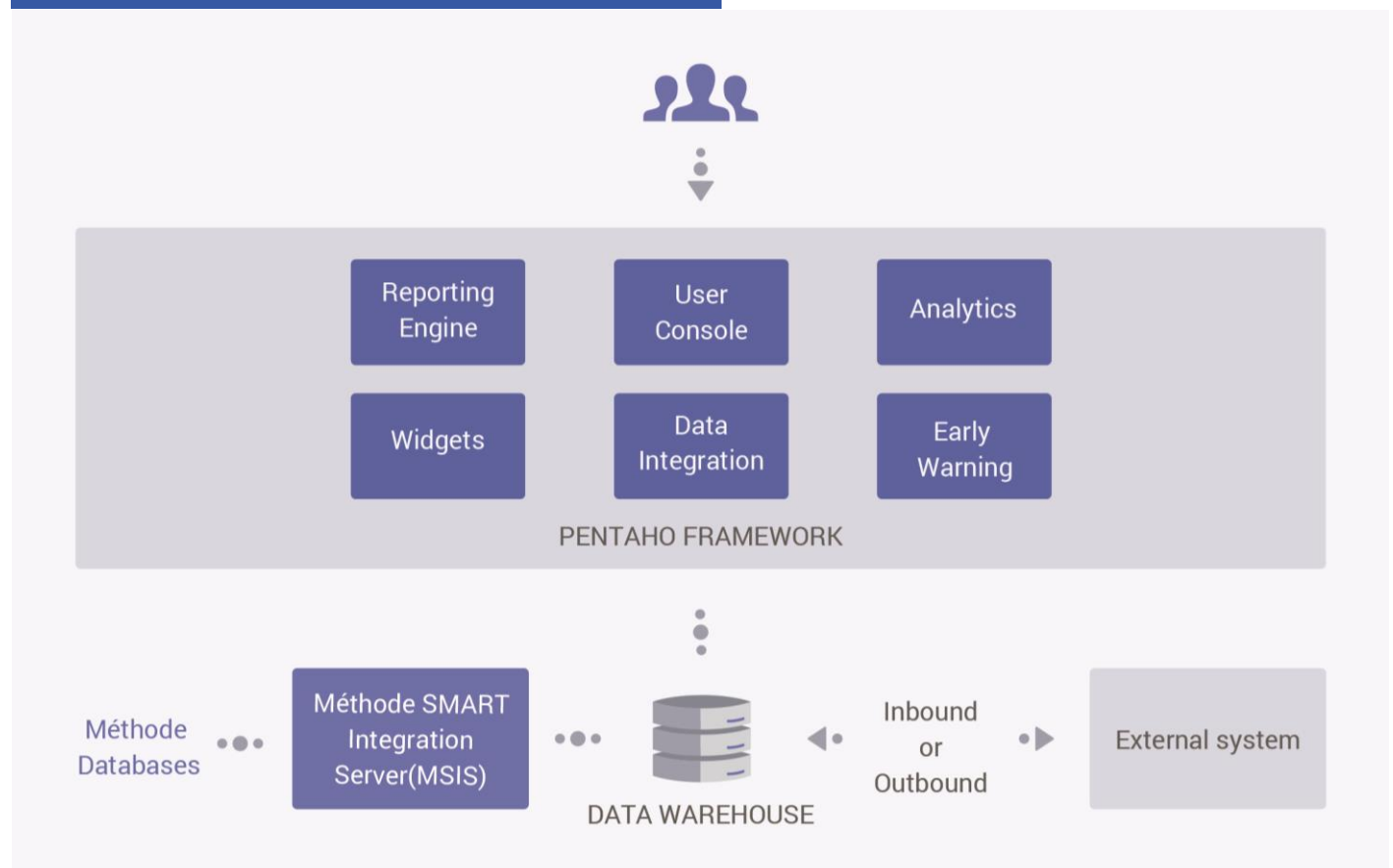
"How long does the average report take to clear legal review?"

"How does the output of this team compare with their target for this month?"

Planning and coordinating staff get a clear view of the relationship between output and the resources and time invested in producing content.

Bottlenecks and inefficiencies are eliminated and resources focused on activities that add real value.

MEASURING AND OPTIMIZING PRODUCTIVITY

PENTAHO FRAMEWORK

- Reporting Engine
- User Console
- Analytics
- Widgets
- Data Integration
- Early Warning

Méthode Databases → Méthode SMART Integration Server(MSIS) → DATA WAREHOUSE ← Inbound or Outbound → External system

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COMPLIANCE AND WORKFLOW GOVERNANCE

Precision and productivity

Investment research is governed by an ever-changing regulatory environment, as well as industry and firmwide best practices and policies.

The need to ensure that products comply with these criteria can affect the productivity of an editorial operation.

Méthode minimizes this trade-off between productivity and compliance with a suite of highly configurable governance tools.

They range from a granular system of user permissions, to prevent unauthorized access and activity, to checkpoints and controls that ensure the necessary reviews and approvals are completed before a document progresses in the workflow.

Together with powerful analytics tools, these mechanisms reduce the level of supervision required, while ensuring that editorial output complies with regulatory and qualitative criteria.

Dynamic user permissions

Every object created in Méthode passes through a number of predefined stages from creation to final publication.

At each stage in this workflow path, the 'permissions' or 'entitlements' associated with the object – who can do what – change continuously so that only permitted actions can be carried out by authorized users at each step.

Permissions can be configured in considerable detail and assigned to specific individuals or groups to provide fine but unobtrusive control over the editorial process.

Conditional checkpoints

As well as governing user access and actions, workflow controls can also be configured on a conditional basis. These checkpoints prevent a product proceeding to the next workflow status unless a specific action or review has been carried out.

Automatic content embedding

Where a product contains fixed text, such as disclaimers, this is pulled in from a central library, ensuring that it is always correct and up to date.

When authors enter critical wordings, such as the names of organizations, Méthode can be configured to prompt the user with suggestions drawn from an updated external database. Accuracy is assured without time-consuming look-up operations.

Smart metadata

All created content is tagged with metadata to indicate its authors and origins. More metadata is added during the workflow to flag the completion of checks and edits.

Metadata tagging is fundamental to the 'smart' behaviour of products in the editorial workflow, assuring many aspects of compliance without the need for manual inspection or intervention.
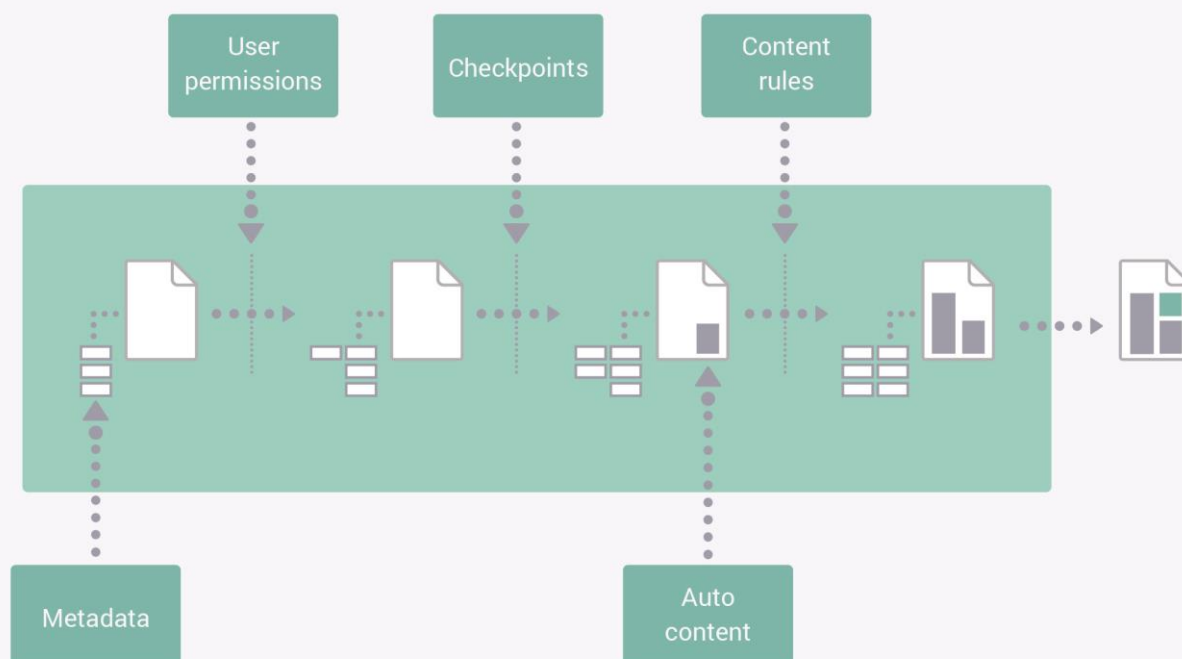
Rules for restricted content

Rules can be configured to notify compliance officers in cases where product content could infringe regulatory standards – for example if an author attempts to write about an organization on a restricted list.

Versioning and audit trail

Every time a document or asset is saved, a new version is created. This creates an 'audit trail', clearly documenting the changes made and the users responsible.

A document can be rolled back to a previous version to recover from erroneous editing or corruption at any time.
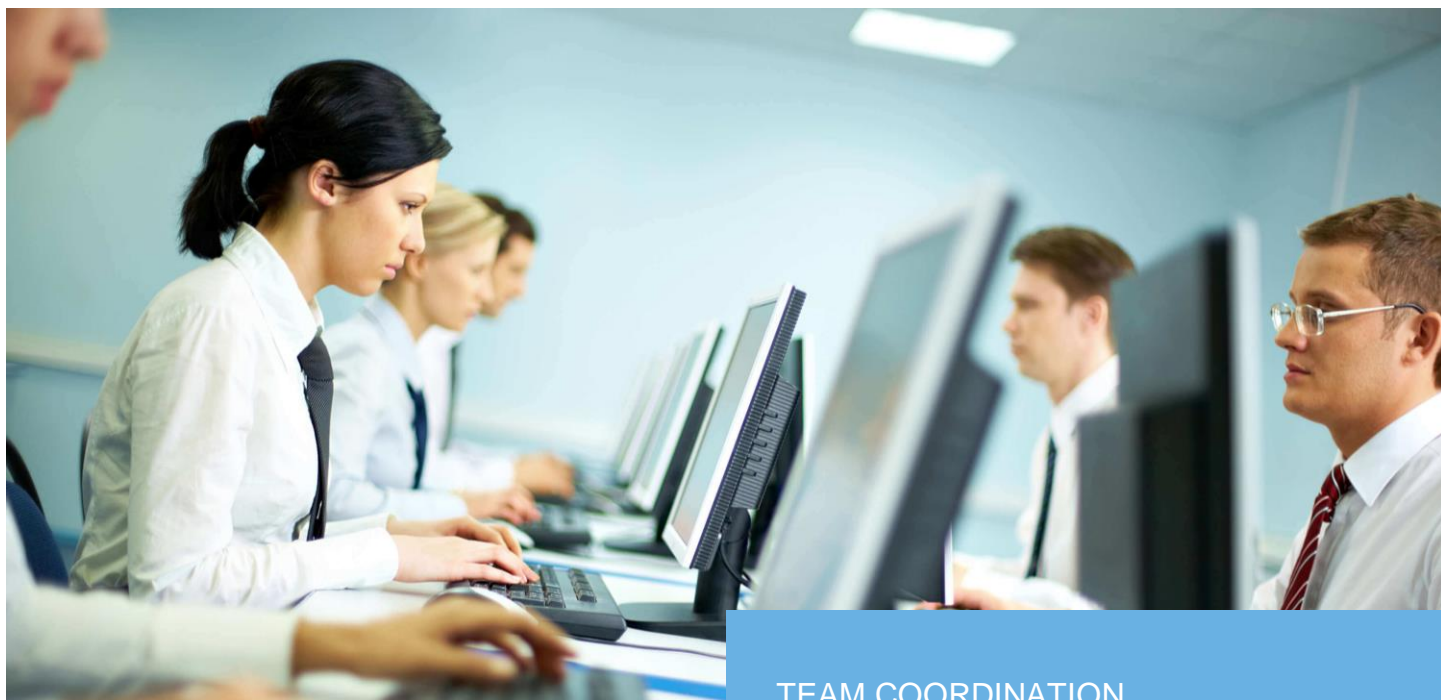
THE ELEMENTS OF COMPLIANCE

TEAM COORDINATION

Planning and collaboration

In addition to its editorial and graphic functions, Méthode also promotes fast, efficient teamwork between users, even at different geographical locations.

An important coordination feature is the shared planning space in which multiple projects can be initiated and monitored. In a single workspace users view and coordinate the entire lifecycle of a project from initial ideas and notes to final publication.

The planning space can be used in a top-down manner for assigning a project, or as a bottom-up mechanism for analysts to propose coverage.

A shared planning space gives high visibility to projects and proposals and their linked assets, keeping all those involved on the same page.

From plan to task

Once approved, a project in the plan enters the main workflow and is assigned as tasks to one or more users, each task corresponding to a deliverable item.

From this point on the project and its deliverable elements are subject to the checks and controls that have been configured for the creation and review of editorial items.

Notifications

As each item passes through the stages along its workflow path, those involved in the next step receive a message that there is a task waiting for them. Clicking on the message opens the document or object for editing or review. This mechanism speeds the editorial process by eliminating the dead time between exchanges.

Notifications work across all Méthode interfaces – including remote users accessing Méthode through the web or tablet apps.

Modular working

Méthode documents can be 'componentized' into different text and graphical elements.

Each component can be worked on in parallel by a separate user while others work on other sections, even following different workflow sequences. Each user sees the whole document in its most updated version in real time.

Working in parallel reduces the time to market for published content. It also allows components developed for one product to be reused in other publications.

Monitoring and feedback

As the document transitions through the workflow stages, the planning space shows its progress and links to components as they become available.
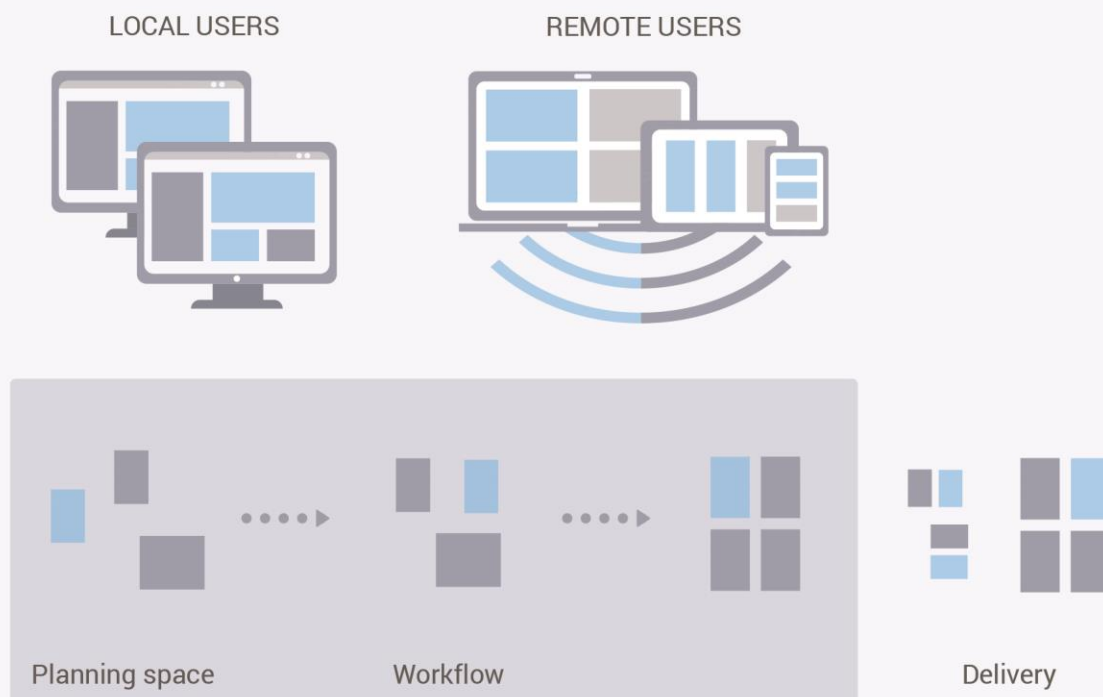
The planning place shows a clear overview of the state of play of an editorial operation and allows early detection of any holdups or bottlenecks in the production process.

Cross-regional coordination

Méthode's collaborative features increase efficiency across regional or international boundaries.

Geographical separation is no longer a barrier to fast, effective collaborative operations. Even users on the move, outside the local office environment, can take advantage of *Swing*, Méthode's browser and mobile-based workspace, to create and edit documents, assign tasks and monitor the workflow of other groups and users.

A GLOBAL WORKSPACE

LOCAL USERS

REMOTE USERS

Planning space   Workflow   Delivery

MULTI-DESTINATION DELIVERY

Challenge and opportunity

In recent years there has been a multiplication of the forms in which consumers of investment research expect to receive the content that interests them.

In addition to the traditional PDF format, financial reporting is delivered in the form of website articles, email alerts, formats readable on tablet and mobile devices and through financial aggregators. It may also be syndicated to other distributors.

Tailoring content for this variety of readers using standard applications is a costly, time-consuming process.

Méthode addresses this challenge by eliminating the work of adapting reports for different channels and devices. As well as significantly reducing time-to-market, the channel-neutral approach makes it easy to add new formats and products to the portfolio.

Investments research firms can offer more, through a wider range of channels, while maintaining the existing resource base.

Multi-format - no repurposing

In Méthode all reports begin life pre-formatted for each of the channels configured to deliver them. At any time the author can preview the report in any of the configured channel versions – PDF, web page, tablet app or mailshot.

When a document is published to a particular channel, the text and graphic elements for that channel are automatically selected and formatted - no manual processes are involved.

The speed and flexibility of this process comes from the use of the channel-neutral format XML to manage all content, together with advanced digital technologies to tailor content to the requirements of each output channel.

As well as eliminating the manual processes involved in repurposing, the 'single-copy' principle also ensures complete synchronization between channels. Corrections and updates need to be entered only once and will automatically appear in every channel version.

Tailored variations

Where it is necessary to send different versions of a report to different groups of recipients, it is no longer necessary to create multiple editions of the same document.

Users simply tag the elements of the report to be included or excluded for each audience. At the moment of publication the different versions are assembled and delivered automatically. The report remains a single object for editing or archiving.

Generating edition variants in this way means that there is no longer any need to align versions or synchronize editing – all edits are automatically carried through to the editions using that content. Versioning and synchronization errors are virtually eliminated.

Adding new channels and products

Because Méthode develops content in a channel-neutral format, adding a new channel or product to the research portfolio is relatively straightforward.
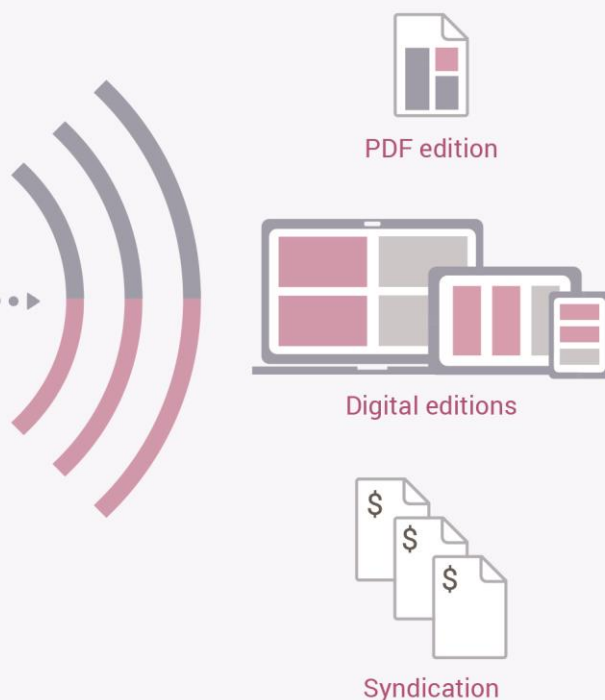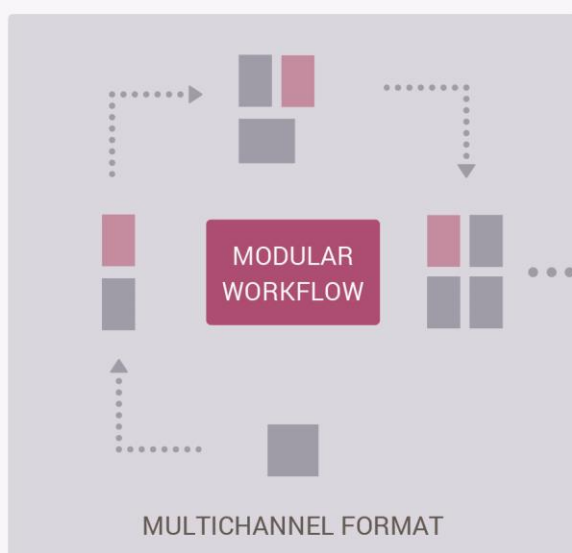
Once the new format has been created, it can be fed with existing content to generate new products with minimal impact on the existing workflow.

Looking beyond conventional text and graphical reporting, Méthode's web technologies also permit the inclusion of interactive charts and models. By allowing customers to actively explore data sets, these can add extra value to the research provided.

Automatic syndication

Méthode can distribute different versions of a report to various syndication services simultaneously. Once configured, the syndication server selects and formats the elements for each syndication destination entirely automatically, without manual intervention.

ONE REPORT - MULTIPLE EDITIONS

MODULAR WORKFLOW

MULTICHANNEL FORMAT

PDF edition

Digital editions

Syndication

FINANCIAL PUBLISHING
WITH MÉTHODE

STANDARD TECHNOLOGIES AND OPEN INTERFACES

A platform to build on

Méthode is not a closed or proprietary system. The use of standard digital technologies brings significant benefits in terms of flexibility and cost-effectiveness. These include ease of integration with existing corporate systems and resources.

The use of familiar technologies and protocols allows the solution to be developed and extended by in-house staff in response to changing operational needs, reducing vendor dependence and development costs.

The high degree of configurability of every aspect of the solution, from user interface to delivery channels, makes Méthode a flexible framework for the development of solutions that can evolve to keep pace with market demands and the emergence of new technologies and formats.

Best-of-breed technologies

Méthode is based on 'best-of-breed' standard technologies, chosen for their power and ease of integration. As well as native XML, Méthode makes use of many other standard formats and technologies like HTML5, CSS3, PDF, and Javascript.

Interfacing and extension

Méthode comes with a complete set of documented APIs for fast, efficient integration with other corporate platforms, as well as external data sources and legacy systems.

The Méthode platform provides a solid basis for developing solutions in line with organizational needs. Since it uses standard technologies, the solution can be maintained and extended by normally qualified staff without the need for specialized knowledge of proprietary systems.

Scalable architecture

Although users see a unified picture of the knowledge base, Méthode's system architecture allows content sources and functions to be distributed across several different physical platforms.

The use of a federated structure gives system designers great flexibility in creating scaled solutions, while optimizing system performance.

Cloud deployment

Méthode can be implemented wholly or partly as a cloud-based deployment. Eidosmedia is an Advanced AWS Partner: its cloud solutions are developed in collaboration with Amazon Web Services.

As well as significantly reducing hardware and maintenance costs, cloud deployments offer many benefits in terms of scalability, continuity and security.

RIXML membership

Eidosmedia is an active member of **RIXML.org**, a consortium committed to the development of the first open standard for investment research.

Eidosmedia contributes to the work of the consortium in developing standard formats for the exchange of market intelligence.

INTERNAL AND EXTERNAL INTEGRATION

EIDOSMEDIA