



Bellevue, WA

www.k2.com

INDUSTRY

- Software/Technology

“We have a distributed technical writing team working in South Africa and the United States. Since Flare is integrated with TFS, it’s very easy to have people in multiple geographies work on the same project.”

Neil Maartens | **Director of Documentation, K2**

Goals:

- Facilitate content re-use to enable more efficient development and delivery of training, tutorials and online Help.
- Strengthen collaboration across K2 documentation teams in South Africa and the United States through integration with Microsoft Team Foundation Server.
- Host content and update it online without having to update product installers.

Solutions:

- MadCap Flare native XML single-source, multi-channel content authoring software
- MadCap Contributor to facilitate collaboration and review of Flare-based content

Benefits:

- **Efficiency:** Flare’s topic-based single-source publishing facilitates content reuse for training, tutorials, and online Help via HTML and PDFs; HTML output support eliminates need to update product installers.
- **Easy Customization:** Extensions enabled by native HTML support, cascading style sheets, and conditional tags with Flare allow K2 writers to deliver highly customized outputs for training, tutorials and online Help
- **Intuitive Experience:** Direct Help access from K2’s software; cascading presentation of information, where content moves deeper and deeper into a concept; plus links to videos and other content provide a rich, intuitive customer experience.
- **Collaboration:** Flare’s integration with Microsoft TFS allows writers in the US and South Africa to collaborate on content, with simple check-in and checkout from a Flare project; MadCap Contributor facilitates review of Flare-based content.



7777 Fay Avenue
La Jolla, CA 92037

Tel: +1.858.320.0387
Fax: +1.858.320.0338

www.madcapsoftware.com
info@madcapsoftware.com

K2 Uses MadCap Flare to Deliver Customer Training, Tutorials and Product Help, in Print and Online, Using Single-Sourced Content

K2 is a leading provider of business application platforms and solutions that empower people to build and run business apps, from the very simple to the highly complex, limited only by their imagination. The low code platform allows users to create customized business applications --using workflows and forms-- that stretch across roles, departments, and data sources. In just 15 years, the company has grown to serve 1.5 million-plus users across over 1,400 Fortune 500 and mid-market customers in more than 80 countries.

Understanding the importance of getting the right information to the right people at the right time, K2 delivers comprehensive training, tutorials, and product documentation to help customers get up and running quickly to rapidly develop applications that solve business problems. Today, K2 relies on MadCap Flare for single-source, multi-channel publishing of all its educational and product documentation content.

Wanted: Easier Content Hosting, Extensibility, and Version Control

For years, K2 used Inovasys HelpStudio to publish product documentation as CHM files. The company wanted an easier way to develop and host content online and update it without having to update product installers as well. K2 also sought to leverage modern approaches to authoring and sharing content in addition to greater extensibility and integration with Microsoft Team Foundation Server (TFS) to facilitate collaboration.

“We have a distributed technical writing team working in South Africa and the United States, and MadCap Flare provides built-in integration with TFS, which we use for version control. This allows our team to work collaboratively and leverage features like scheduled automatic builds of help content,” explained Neil Maartens, director of K2 Documentation. “Since Flare provides HTML output, it is easy to customize and add extensions using standard web-based technologies like HTML, CSS and JavaScript; no proprietary extensions are needed. This allows

us to tweak the content to our particular requirements and standards.”

Customer Enablement via MadCap Flare

K2 now provides three levels of customer enablement for its platform, all supported by the single-sourced content developed and delivered with MadCap Flare:

- Training content that supports instructor-led training, guided online training, and free self-directed training
- Learning content, such as tutorials and scenario-based Help content, which empowers users to teach themselves how to use K2
- Performance support for day-to-day use of the platform, providing context-sensitive help when it is needed

“Because we provide a powerful business application platform, we not only need clear documentation on how to use our software, but also the ability to teach them how to build applications.” Maartens says. “A major benefit of Flare is that we can use it to author our software documentation and training content and we are able to reuse content between all of our enablement mechanisms.”

“We have different products, but use the same content development tool and share single-sourced content between these products, further enhancing our productivity, consistency and quality,” Maartens notes.

“A major benefit of Flare is that we can use it to deliver both our software documentation and training content, and we are able to reuse a lot of content between our teams.”

Neil Maartens | Director of Documentation, K2

Empowering Authors

K2's online MadCap Flare content is delivered as HTML5 output. By using HTML5, K2 writers can provide a modern look and feel that closely matches the company's website and product offerings.

Additionally, MadCap Flare's support for standard HTML allowed K2 to extend the functionality of the output. For example, the company injected a version selector drop-down through an HTML handler to allow customers to easily switch between different versions of the documentation. K2 has also integrated performance support content with an external database, allowing them to constantly update and extend content that provides the right help at the right time. See Figure 1 and Figure 2, respectively.

Together, cascading style sheets (CSS) and conditional tag functionality in MadCap Flare enable K2 writers to deliver highly customized styling for different outputs. For example, the K2 Appit for SharePoint User Guide and the Appit Training Course have a very different appearance (see Figure 3), but are based on the same content.

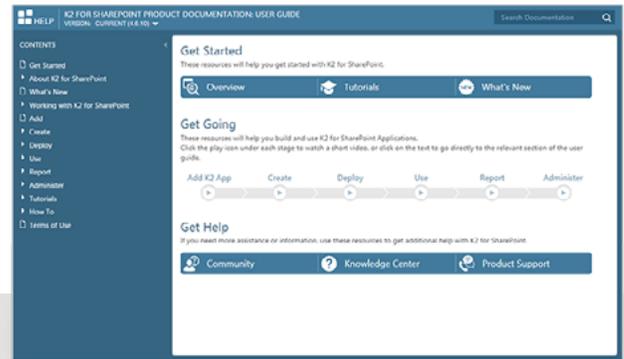


Figure 2: Using MadCap Flare's support for standard HTML output, K2 used jQuery scripting to integrate performance support content with an external database to provide context-sensitive help.

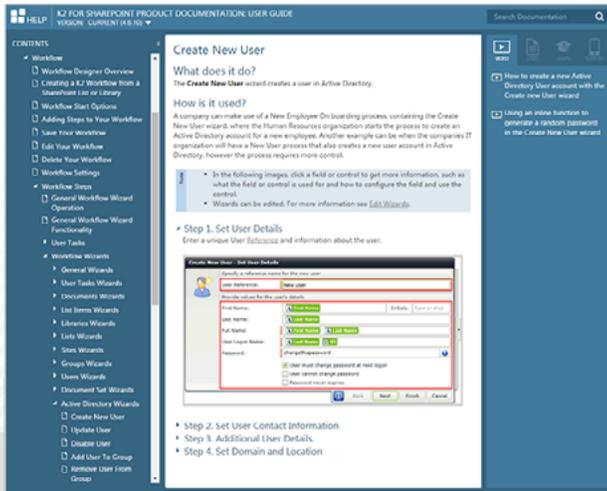
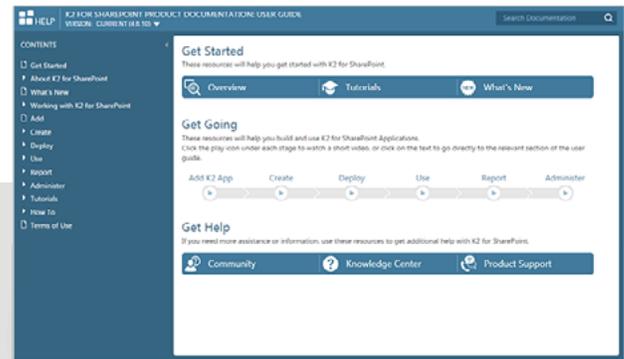


Figure 1: Using MadCap Flare's support for standard HTML output, K2 created an extension to inject a version selector drop-down through an HTML handler

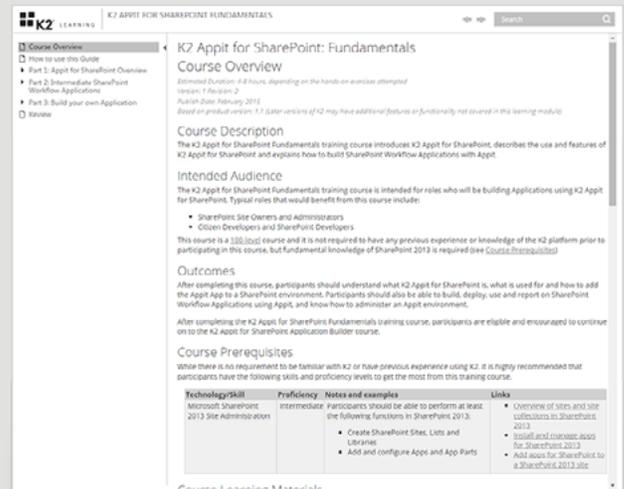


Figure 3: Using MadCap Flare's CSS and conditional tag functionality, K2 writers can provide highly customized styling, such as the very different look and feel of the K2 Appit for SharePoint User Guide and Course Overview.

“We use conditional tags extensively to support single sourcing” Maartens observes. “We have a number of build targets in PDF and HTML that use conditional tags to output and format appropriate content for the output type. Additionally, because our products are very similar, we can use conditional tags to re-use the same content for multiple products.”

Automated builds further assist in facilitating K2 writers’ efforts, Maartens notes: “We use the MadCap Flare Scheduled Build Task function, so that Flare just automatically builds our content, based on the schedule we decide for publishing, usually between once per week and twice per month.”

Facilitating Collaboration

Single sourcing of content with MadCap Flare plays a central role in facilitating collaboration within the Documentation and Training teams, as well as between them.

“All of our styling and customization is maintained in one Flare project, which allows us to maintain customization in one place and push it to other projects,” Maartens explains. “In addition, some content is common between product documentation and training content, and single sourcing with Flare makes the development process easier and faster.”

Equally important to K2’s collaboration is MadCap Flare’s integration with Microsoft TFS for source control. “Since Flare is integrated with TFS, it’s very easy to have people in multiple geographies work on the same project. Writers just check in and check out files directly from the Flare project.” Maartens says.

Extending collaboration to the review process, K2 has begun using MadCap Contributor to send out content for other team members in the company to review and provide feedback.

Enhancing the User Experience

Using MadCap Flare, K2 has been able to enhance the user experience in a number of ways. The technical writing team has integrated Help content directly into the product itself, so that when a customer clicks on Help in various places of the product, it automatically drops the user into the specific Flare topic, providing context-sensitive help. The team has also used Flare to create friendly welcome pages and end-user focused tables of contents (TOCs).

Additionally, writers take advantage of MadCap Flare’s topic-based authoring, CSS, and content reuse to update information for customers more often, as well as offer a cascading presentation of information.

“Our content is very customer focused, and with Flare, we can easily take input from customers and update our documentation in a short cycle.”

Neil Maartens | Director of Documentation, K2

“Our content is very customer focused, and with Flare, we can easily take input from customers and update our documentation in a short cycle,” Maartens notes. “At the same time, we use Flare to create a very user friendly cascading presentation of information where the content moves deeper and deeper into a concept, and we add links to videos and other content to enrich the customer’s experience.”

“We use Flare to create a very user friendly cascading presentation of information where the content moves deeper and deeper into a concept, and we add links to videos and other content to enrich the customer’s experience.”

Neil Maartens | Director of Documentation, K2

Meanwhile, K2’s need for MadCap Flare support has been minimal.

Maartens explains, “We have a number of MadCap support licenses, and the times that we’ve needed assistance, we have gotten a very rapid response, but the software is easy enough that we are usually able to figure things out for ourselves.”

Maartens added, “MadCap Flare has become a strategic tool for delivering content that supports all facets of customer enablement with our platform—from training, to ongoing learning and day-to-day Help. In the process, we are not only gaining greater efficiency for ourselves but also speeding the time that our customers can begin reaping the benefits of our platform.”