OverDrive®

Cleveland, OH

OverDrive Replaces Microsoft Word and Web Content Management System with MadCap Flare to Create Modern HTML5 Online Help Integrated With Salesforce, SharePoint and Apache SVN

INDUSTRY

- Digital Content Distribution

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>
> Deb Halinski | **Manager, Knowledge Services - Learning Systems, OverDrive**

Goals:

- Modernize online Help with HTML5 content

- Streamline the process of updating online Help articles for internal and external users

- Enhance the user experience with optimized search

- Improve users' understanding of products and services

Solutions:

- MadCap Flare native XML tool for topic-based authoring and single-source publishing

- MadCamp intensive four-day training

Benefits:

- Topic-based authoring, single-source publishing, and conditional tags in Flare make it easy to generate content for internal and external users

- SharePoint integration enables cataloguing of Flare metadata to facilitate organization and production

- Apache SVN integration helps writers save time by compiling Help content on local machines

- HTML5 output provides customers with a visually attractive, state-of-the-art Help website

- Tagging Flare-based content with index keywords is improving search results

- Publishing Flare-based content to Salesforce via APIs delivers a searchable support knowledge base

- MadCamp's intensive four-day training shortened learning curve and cut project development time

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OverDrive is the leading global digital distribution platform, supplying the industry's largest catalog of eBooks, audiobooks, music, and streaming video to tens of thousands of libraries, schools, and retailers worldwide. OverDrive delivers all digital media on a single platform, and offers APIs for a seamless user experience. All major computers and devices, including iPad®, Chromebook™, Android™ and Kindle® (U.S. only) are supported.

Recent enhancements to OverDrive's platform include multilingual user interface support, in-library touchscreen stations for browsing and sampling, and OverDrive Read, a browser-based reading experience. The OverDrive app is rated the best eBook app for libraries and schools by users on all app platforms.

To help OverDrive users successfully borrow digital eBooks, audiobooks, music, and video from their library, the company relies on MadCap Flare to deliver simple and intuitive online Help. Re-launched in March 2014, OverDrive Help (http://help.overdrive.com) has proven an effective onboarding and troubleshooting resource for OverDrive customers.

Mission: Reinvent OverDrive Help

For years, OverDrive used a combination of Microsoft Word (to develop Help content) and the Sitefinity content management system (to publish Help online). However, the team was not able to effectively scale the system to support a rapidly evolving company with an agile environment: OverDrive Help became unstable and outdated, and tensions ran high.

"We weren't getting clean HTML with Word, which was a major roadblock in achieving a consistent look and feel for our system," recalled Quinton Lawman, OverDrive technical writer.

Even more critical, "Sitefinity just wasn't cutting it," noted Carrie Smith, OverDrive technical writer. "We needed more advanced features to build a solid Help system that would unite our content development and content management efforts seamlessly."

As a result, OverDrive began to search for a tool that would enable the company to completely reinvent its Help system, streamline processes, and achieve a modern look.

A review of leading industry products led the OverDrive team to MadCap Flare, providing modern topic-based authoring and single-source publishing, as well as support for state-of-the-art HTML5 output.

"We saw in Flare a comprehensive tool that would let us meet our requirements for rapid publishing, responsive design, and branded Help portals for our various products," recalled Deb Halinski, manager of OverDrive's Knowledge Services – Learning Systems. "Everything we needed seemed possible."

With an eye to the future, OverDrive purchased the full MadPak Suite, which included not only MadCap Flare but also MadCap Lingo to address the company's need for multilingual support and additional tools for creating multimedia output.
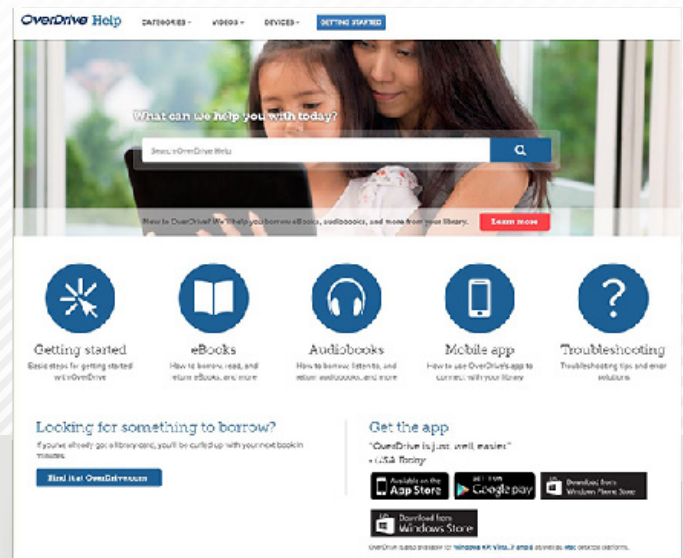
OverDrive's Online Help

MadCamp Training Speeds Learning Curve

After purchasing the MadPak Suite, the close-knit team of Over-Drive technical writers attended the MadCamp four-day intensive training course in October 2013 to learn more about their new tools, specifically Flare.

"MadCamp provided us with invaluable training," Deb noted. "Attending as a team really opened our eyes to the possibilities we could achieve with MadCap's software."

Carrie added, "We have a great relationship with MadCap support. They played a central role in getting us started as a team and on the same page. Engaging with them is fantastic—dynamic and interactive."

With a solid understanding of MadCap's software, the OverDrive team was ready to migrate its existing content from Word to Flare.

Streamlined Delivery of External and Internal Content

Today, OverDrive's Flare-based Help project contains 1,050-plus documents, manages more than 400 articles on its Help website, and provides a knowledge base for the OverDrive Support Services team. To synchronize and streamline its efforts, the company integrates with the Apache Subversion (SVN) open source version control system, as well as Microsoft SharePoint collaboration and management software.

"The integration of Flare with Apache SVN is terrific. Now we can compile all of our Help content on our local machines, which is much faster than having to go over the network" Quinton notes.

Meanwhile, SharePoint houses metadata for all documents, which are also color-coded in Flare to indicate whether the outputs are internal (for OverDrive Support Services) or external (for customers).

"The ability to catalog metadata from Flare in SharePoint keeps us organized and facilitates production," Quinton explains.

Production of internal and external outputs is further facilitated by the use of conditional tagging with Flare. This has helped Over-Drive to cut project time, since it lets the company's writers use the same content both externally as a general resource website for end users and internally as a solution set to help the Over-Drive team to quickly address specific problems.

"Conditional tags are great because we don't have to duplicate our efforts. Content is organized in our Flare project for both internal and external users, generating outputs appropriately," Carrie explains.
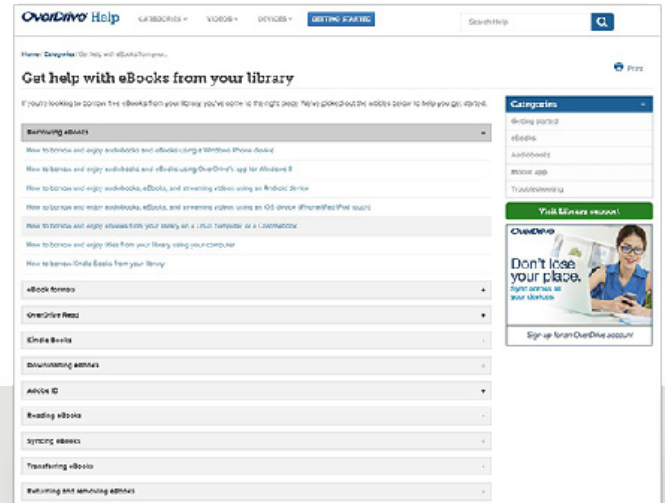
OverDrive's Modern Online Help

Modernizing Content Via HTML5 and XML

HTML5 output is a central part of OverDrive's commitment to providing customers with a visually attractive, state-of-the-art Help website and giving employees an easy-to-navigate knowl-edge base. To deliver this content, the company's writers take advantage of the HTML5 output functionality in MadCap Flare, as well as its native XML editor.

"Flare gives us the clean HTML5 output we need to generate content on whatever platform we choose," says Quinton.

Notably, OverDrive delivers internal content by exporting articles from Flare with HTML5 targets. These are pushed into APIs that are integrated with Salesforce to deliver a searchable support knowledge base with standard responses to specific customer problems.

"We can push our Flare-based content to Salesforce using their APIs, which allows us to easily maintain an internal knowledge base for our support team, and it's simply part of our standard publishing workflow." Carrie observes.

At the same time, the native XML editor in MadCap Flare has streamlined OverDrive's editing process.

"Before, we would have to search our site for information to make changes, which was grueling," Quinton explains, "Now, by viewing the XML code in Flare, we can easily search for a URL and make changes quickly and easily."

Indexing for Faster, Easier Access

Finally, OverDrive takes advantage of Flare's indexing capabilities to improve the user experience. Through index keywords, OverDrive users can find information quickly and easily because search terms are linked to relevant topics.

"Being able to tag Flare-based content with index keywords has really improved search results on OverDrive Help," Quinton notes, "It's really cool how the simplest features can create the biggest impact. We have just begun to tap the features in Flare, and the results have exceeded our expectations."

Deb adds, "Our CEO encourages the idea that Help should be easy, and the path to answers should be direct. Indexing with Flare is one more way we are working to achieve that goal."

Next Chapter: French Language Help with MadCap Lingo

Following the successful launch of OverDrive's new Help system, the company will soon begin developing a French Help website using Flare and MadCap Lingo.

"Before Flare, we engineered a French Help website with WordPress. But updating it is a painful, manual, unsustainable process," Deb recalled. "With Flare, we now have the features we need to build a robust multilingual Help system."

MadCap Lingo, which is fully integrated with Flare will provide this multilingual support. Together, the tools will support the content management, editing and translations required to create the new French online Help system.

Carrie says, "We are confident that we can build a great French Help website using MadCap Lingo and Flare. We are thrilled to start writing this new chapter of our Help story, in French and other languages to come."

A More Interactive, Personalized Future

Looking ahead, OverDrive plans to make deeper use of Flare's topic-based authoring and single-source publishing capabilities to take the same core content and partition it to different audiences.

"We use the same digital distribution model for all of our users—including public libraries, college libraries, schools, and retail partners. However, trying to teach a student versus a public library user how to borrow a book can be approached differently," explains Quinton. "We would like to use different wording to thoughtfully and appropriately connect with these users."

OverDrive also aims to create a more interactive Help website. Utilizing HTML5, the company plans to include tutorials and image maps across OverDrive Help. Additionally, OverDrive is exploring other MadPak Suite tools, such as MadCap Capture, to include screenshots as an added visual boost for its Help.

Carrie notes, "We're excited to start using the other features in the MadPak Suite, which really seem to complement our goals for growing our system."