BA INSIGHT

Boston, MA   *www.BAinsight.com*

INDUSTRY

• Software

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Pat D'Ambrosio | **Documentation Lead, BA Insight**

Goals:

• Single-source publishing of content to multiple outputs.

• Bring documentation system and processes to a higher standard.

• Streamline the process of updating documentation and training materials.

• Enhance the user experience with optimized search and documentation delivery.

Solutions:

• MadCap Flare native XML tool for content authoring and single-source publishing.

Benefits:

• Flare's topic-based authoring and single-source publishing eliminated redundancies in developing and delivering new software documentation, Web-based Help, and Help content integrated within the software.

• Auto-numbering of PDF content reduces the reference time for technical writers, who handle over 2,000 pages of writing.

• Flare's Microsoft® Word™ import capabilities let writers seamlessly import content from Word™ and then publish editable PowerPoint® slides as one of the Flare outputs.

• Content structured as topics makes it easy for end users to search for information.

• Top-level glossary, index and table of contents for quick information reference further simplify users' search for information.

• Screenshots integrated with step-by-step directions in Flare enhance end users' comprehension.

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BA Insight Uses MadCap Flare to Optimize Processes and Materials for Online Help, PDF and Microsoft® PowerPoint® Outputs

Since 2004, BA Insight has been dedicated to transforming the way organizations find and access information through software that enables organizations to rapidly implement powerful search-driven applications at a fraction of the cost, time, and risk of alternatives.

Fueled by the emergence of big data and market demand for search-driven applications, BA Insight grew 193% during a five year period, leading the company to be ranked 393 on Deloitte's 2013 Technology Fast 500TM. BA Insight's signature Knowledge Integration Platform earned the KMWorld magazine "Trend Setting Product of 2013" award for the third consecutive year, and BA Insight was named to "KMWorld's 100 Companies that Matter in Knowledge Management for 2014," as well as the three years prior.

To help customers optimize their use of its award-winning Knowledge Integration Platform, BA Insight relies on MadCap Flare to deliver documentation and training materials for the platform's different tools across multiple outputs, including Web Help, PDF files, and fully editable Microsoft® PowerPoint® slides.

A Clean Setup: Roadmap for a Revamp

Recently, as BA Insight experienced significant internal and external growth, the company realized the need for a more effective training and documentation system that could support both its internal team and end-user community.

The new system, BA Insight decided, would require a complete revamp of its documentation with new templates and styles. At the same time, the new system provided an opportunity to take a single-source approach to delivering documentation and learning materials—using one table of contents for multiple outputs: Web Help, PDF, and PowerPoint slides.

"We wanted to improve our documentation for training purposes and make the delivery for every release more efficient," recalled Pat D'Ambrosio, BA Insight documentation lead. "All of the information had to be easy for our users, so they could get in and out without extensive reading."

Pat added, "We determined that our ideal documentation system structure would be like street signs guiding people. We wanted
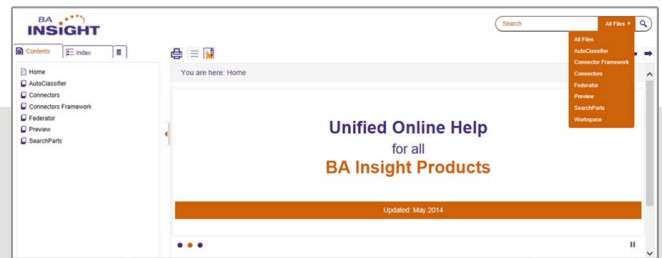
BA Insight's unified WebHelp, which builds across all of their products

this to be set up cleanly, almost in a repetitive form, so writers could focus on the technical content and end users could focus on user content."

After evaluating leading technical communications tools on the market, BA Insight identified MadCap Flare, with its single-source publishing capability and ease-of-use, as the clear tool of choice for evolving its training system.

MadCap Flare is now helping BA Insight to enhance the user experience while streamlining the efforts of its team

Topic-Based Content Simplifies Searching

BA Insight uses MadCap Flare's topic-based authoring to provide a clean layout and simple direction for its end users.

All topics are maintained centrally in a single Flare project. As a result, information is easy to search—whether it is contained within one topic or can be reached through pointers to other topics.

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"We hosted a roundtable to discuss and assess the growing trends for making an effective search system, and we concluded that this could be done with topics in Flare," said Pat.

Additionally, because capabilities in the Knowledge Integration Platform are shared across the company's different tools, BA Insight takes advantage of Flare's topic-based authoring to create chunks of content for reuse, ensuring consistency while eliminating the need for redundant efforts.

Simplifying Content Delivery

BA Insight takes advantage of several MadCap Flare features to streamline the processes around creating and publishing content. One of the most popular features is Flare's page layout functionality.

"Flare's page layout feature lets us flex between documentation and training page layouts by specifying the default page layout through most of the table of contents chapters and specifying the correct page layout in the appropriate target," Pat explains. "This removes a great deal of work we would otherwise have to do manually."

Complementing the page layouts, Pat observes that, "The style
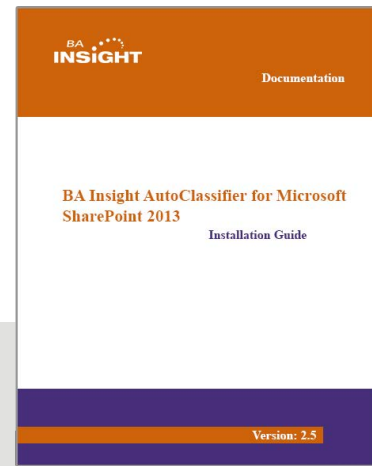
BA Insight's Installation Guide in PDF format, output from MadCap Flare

sheets created with Flare, which are based on targets, have really helped us achieve the exact look and feel we wanted for our system revamp."

BA Insight technical writers also use Flare's auto-numbering capability for its PDF content. This allows them to quickly comb through thousands of pages worth of content using chapter titles, section headings, tables and examples. Since auto-numbering can be used for both online and print-based outputs, the company saves time working across its PDF and Web Help content."

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"Auto-numbering our PDFs in Flare has helped us manage over 2,000 pages of writing quickly and easily," Pat notes.

Additionally, BA Insight makes extensive use of Flare's functionality for importing Microsoft® Word™. Writers take content written using Word™ and simply import it into Flare. From there, they can publish editable PowerPoint® slides as one of the outputs.

Beyond the features of Flare, itself, the MadCap community and resources have been instrumental in streamlining BA Insight's content creation and delivery.

"Working with MadCap has really spread a positive energy across our system," Pat observed. "Getting ramped up with Flare was just as easy and quick as working with the tool itself. With an abundance of resources, from free webinars to online forums, we felt like we had a solid community of support to build with."

Example BA Insight slide, output from MadCap Flare

Using Flare, the writing team has created a glossary, index and table of contents for quick information reference for each output type. Additionally, the tables of contents for the Web Help and PowerPoint® outputs are conveniently organized for users with subsections.

A Quality User Experience

Hand in hand with improving efficiency, BA Insight has significantly enhanced the user experience.

"Having the reference features provided by Flare, such as the glossary, index and table of contents, has really proven useful for anyone learning our system—from our growing internal team to our diverse community of end users," Pat says.

BA Insight also uses Flare to present step-by-step directions with screenshot images that users can reference.

"Integrating the graphics into Flare adds a really great visual element that enhances our documentation and training materials," explains Pat. "It gives our users an extra boost of support and confidence to see if everything is on track."

Building on Success

With its revitalized online Help system, documentation and training materials in place, BA Insight is looking ahead to the next phase of the system. This includes a new customer portal and online learning offerings.

"After the overwhelming success we've experienced with the recent revamp, we are looking forward to developing a new set of templates," Pat says. "We are also excited to start transitioning toward a platform approach to documentation."

Pat notes, "I've become a complete cheerleader for Flare, and can't wait to bring our documentation to the next level with MadCap."