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Publicly Traded and Leading Solution Provider for Nonprofits Uses MadCap Flare to Collaborate, Customize Content, and Publish Documentation in Print, on the Web and Mobile Devices—All From the Same Project

INDUSTRY

- Software



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Tom Tregner | **Blackbaud**

Goals:

- Facilitate reuse of content for different user guides
- Support clients' output of choice: print, Web or mobile
- Customize content and style of online and print content
- Facilitate collaboration internally and with clients
- Synchronize content updates

Solutions:

- MadCap Flare native XML content authoring tool

Benefits:

- Global linking allows content to be reused for multiple online Help and print documentation projects
- Single-sourcing allows the same Flare project to be published as Web Help, mobile Help, PDF files, and Word documents
- Topic-based authoring makes custom documentation fast and simple
- Separation of style and content makes it easy to customize the look and feel
- Mirroring enables synchronization between Web Help and mobile Help
- TFS integration facilitates collaboration within Blackbaud
- Word output lets Blackbaud incorporate feedback from clients



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For more than three decades, Blackbaud has combined technology and expertise to help nonprofit and education organizations achieve their missions. The company now enables more than 27,000 clients in 60 countries to raise over \$100 billion each year.

To help the developers and end users at these organizations use its cloud-based and on-premise software solutions, Blackbaud delivers user assistance content created with MadCap Flare. Single-sourcing in Flare allows Blackbaud's documentation team to publish the same content to users' format of choice, including print, Web and mobile. Meanwhile reuse of content with Flare promotes efficiency and ensures consistency, and integration between Flare and Microsoft Team Foundation Server (TFS) facilitates collaboration.

"The integration with TFS was one of the things that drew us to Flare," says Tom Tregner, Blackbaud enterprise training engineer and now also a certified MadCap Application Developer for Flare. "With more than one person working out of our content sets, we would have had a hard time tracking versions if it weren't for Flare's TFS integration."

Modernizing Content Creation

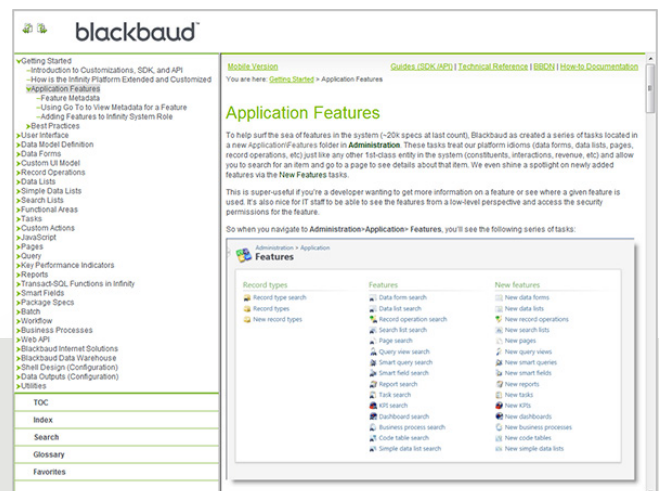
The move to Flare arose out of an initiative to modernize the creation and delivery of online Help and print documentation for Blackbaud's clients. A top priority was moving to a topic-based structure that would facilitate content reuse, as well as provide a separation between style and content.

Initially the company looked at the Darwin Information Typing Architecture (DITA), a standard XML data model for authoring and publishing. However, after evaluating products with DITA functionality, Blackbaud decided to use Flare.

"Although, Flare doesn't support DITA, it is based on native XML and provides the robust topic-based approach to authoring that we wanted," recalls Denise Kadilak, Blackbaud information architect.

"We also like the ability to customize our content with Flare," adds David Owens, Blackbaud user education manager.

"We have two sets of users, developers and end users, so we maintain two different content sets to support their needs. We also need to publish to Word, PDF files, the Web, and mobile, and Flare lets us do that all from the same project."



Blackbaud's SDK Guide WebHelp

Customizing the Experience

Flare plays a central role in customizing both the content and the look and feel of the documentation and online Help that the company provides clients.

For example, Denise says, "We recently had a museum client who wanted a manual published with very specific information to help him train his front office staff. A couple members of our team created the content he needed by using existing topics in Flare and building a new table of contents. Within a couple days, we were able to deliver a customized user manual as a Word file, so the user could make additional changes. Before we had Flare, this wasn't an option."

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The availability of content as a Microsoft Word file has been popular with Blackbaud’s customers, she adds; “Since nearly everyone uses Word, it allows us to more easily get feedback from clients before finalizing projects, and clients can make changes without downloading new software.”

On the design front, David observes, “Our team has done a lot of work with the cascading style sheets to customize them so that our Web-based Help looks like the Blackbaud website.”

Synchronizing Web and Mobile Help

Another way Blackbaud supports customers is by making online Help convenient to access either as standard Web Help or as Mobile Help.

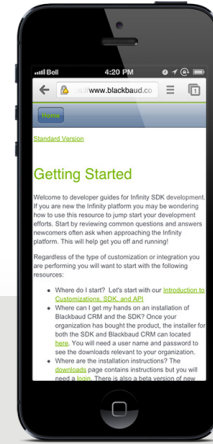
“We’ve used mirroring with our Flare-based Help, so that we have a mobile topic for every regular Web Help topic,” Tom explains. “We also created a JavaScript link generator, so there’s always a link between the two, which allows us to go back and forth. It wasn’t too hard to develop.”

Content is also synchronized through the process of runtime merging within Flare. All the multiple runtime targets for print, the Web and mobile get merged into the larger Web Help. For the user, the Web Help appears to have standard navigation, and they don’t know that the content is coming from multiple places.

“Runtime merging allows us to update the site for a specific content area quickly,” Tom says. “We then build the Help using an automated batch process with Windows Scheduler, so we can update and publish it on a daily basis. There’s no waiting until next quarter.”

Global Linking is Key to Content Reuse

The global linking feature in Flare provides a very flexible way to reuse content, and Denise notes that, “We use Flare’s global linking extensively to milk every ounce out of our content.”

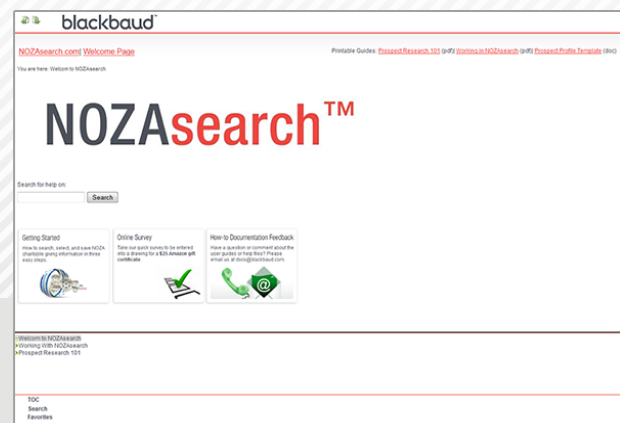


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Blackbaud maintains parent projects from which other child projects can pull topics or file types—such as online Help files and PDFs, allowing for faster turnaround time. Through global linking, the information in the parent project will be updated in all the child projects at once.

“We have about 35 standalone Flare projects that are filled with common content,” Denise explains. “From each of those parent projects, we create four or five child projects that filter for certain topics in order to create projects that are customized for different applications. Because Flare also supports different formatting or conditions using the same content, it’s very easy to get exactly what we want.”

Tom observes, “We make really good feature-rich products, and we appreciate that Flare is a feature-rich product as well. Sometimes the biggest question is which feature to use, but I like that Flare provides more options. It means we can choose the approach that works best for our needs.”



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