



A Case Study in Technical
Communication Best Practices

SMART[®]

COMPANY WEBSITE
www.smarttech.com

LOCATION
Calgary, Canada

INDUSTRY
Interactive Technology

SMART Technologies, Interactive Display Innovator, Relies on Single-Source Publishing of MadCap Flare to Speed Delivery of a Responsive HTML5 Support Site and PDF Guides

GOALS

- Streamline the development and delivery of SMART Technologies' documentation to multiple outputs by replacing Adobe FrameMaker and Adobe RoboHelp with one tool for single-source, multi-channel publishing.
- Design a modern support site that aligns with the SMART Technologies corporate website and creates an intuitive and appealing experience for users.
- Use a responsive HTML5 design approach that adapts to users' screens—from desktops and notebooks to mobile phones and tablets.
- Enhance users' experience by making it easier to navigate the support site and find the information they need.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software
- MadCap Lingo computer-aided translation (CAT) tool and workflow management software
- MadCap Capture for screen capture and image editing
- MadCap Analyzer for analyzing Flare content and recommending improvements

BENEFITS

- **Efficiency** — Flare's topic-based single-source publishing facilitates content reuse and speeds the creation and delivery of a support site, plus supporting PDFs. MadCap Lingo streamlines the process of translating SMART Technologies' documentation.
- **Intuitive User Experience** — Responsive design that adapts to users' screens, embedded videos, and user feedback functionality in Flare provide a modern, interactive web experience.
- **Easy Customization** — Snippets and conditional tags in Flare enable SMART Technologies to customize the content, as well as look and feel of different documentation versions with minimal effort.
- **Improved Navigation** — Flare's HTML5 frameless output enables users to find and access information using their preferred search engines. Drop-down text lets customers view only what they want to see, giving them more control over their experience.



SMART Technologies, creator of the world's first interactive whiteboard, SMART Board®, is a world leader in interactive displays. Using its solutions, groups can turn their work into a highly collaborative, engaging and productive experience for everyone—from primary school students to innovators in Fortune 500 companies. Now more than 3 million interconnected displays, software, and accessories are installed around the world in education, business and government settings.

To help customers take full advantage of its interactive solutions, SMART delivers product documentation both as PDFs and as responsive HTML5 support site pages that automatically adjusts to users' screens, from desktops to mobile devices. Today, the company relies on MadCap Flare's single-source, multi-channel publishing capabilities to streamline the delivery of this content in users' format of choice.



Goal: Eliminate Complexity Created by Multiple Tools

For years, SMART Technologies relied on a combination of Adobe FrameMaker and Adobe RoboHelp to produce its online Help and PDF-based documentation. However, the company found it increasingly difficult and time-consuming to update and maintain multiple versions of the same documentation, each with slightly different variations.

"We have a lot of different hardware and software products that we need to produce documentation for, some sharing similar components, such as the same embedded software on different interactive display models," explained Ken Schatzke, senior technical writer at SMART Technologies. "Maintaining content for all these different versions was redundant and inefficient using our previous tools."

Since SMART has several products that share similar features, the technical communications team wanted the ability to streamline authoring efforts by reusing content whenever possible. This would require a move to modern software that supported topic-based authoring and offered the ability to publish to multiple channels from a single content source. Additionally, the writers saw an opportunity to reinvent and modernize online documentation to support the growing move toward more web-based content. An evaluation of solutions on the market quickly led SMART to MadCap Flare.

"One of Flare's biggest attractions was its out-of-the-box capabilities, which allowed us to produce high-quality HTML5-based and PDF outputs without having to deal with toolkits or customizations," explained Schatzke. "We also liked its predictability and its variety of features."



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KEN SCHATZKE

Senior Technical Writer | SMART Technologies

Streamlined Delivery via Single-Source Publishing

Today, SMART Technologies provides customers comprehensive HTML5-based support site that is fully integrated into the company's corporate website. The support site contains HTML5-based documentation on how to use SMART's hardware and software products. Additionally, the support site offers downloadable PDF guides that complement the web-based content.

By taking advantage of MadCap Flare's topic-based, single-source publishing, SMART Technologies' writers have significantly cut the time required to develop and deliver content.

In the past, producing documentation required multiple manual steps. First, the writers created the user guide content in Adobe FrameMaker. Then, they had to make copies of the file to produce different versions of the documentation for various products. Next, the content would be copied and pasted into Adobe RoboHelp to produce the HTML5-based Help. By contrast, the writers now develop, edit, and publish content to multiple outputs from a single MadCap Flare project, significantly speeding project time while ensuring consistency.

"Thanks to Flare, we're able to create and deliver content in one place instead of using two different tools, which has allowed us to save a tremendous amount of time," Schatzke notes. "That's a huge benefit for us, since we have to maintain both our new and existing documentation for all of our product lines. We're now able to do a lot more because the process is much more simple and efficient."

Schatzke adds, "Although we're moving more toward web-based content, we still want to provide users the option of accessing documentation via PDFs. So, the fact that we can easily produce PDF and HTML5 outputs from the same source file has been a game-changer."

To further streamline authoring efforts, SMART's writers also rely on MadCap Flare's integration with Apache Subversion (SVN) to facilitate collaboration and version control. The team is also in the early stages of migrating to MadCap Central. Source control, whether with SVN or MadCap Central, has enabled the team to manage changes to Flare files in one central location, making it easier for the writers to work together while freeing up time to focus on the content itself.

Maximizing Content Reuse

The SMART team has gained additional efficiencies through the extensive use of snippets and conditions in MadCap Flare to maximize content reuse for its different outputs.

"Since we have so many different product lines that share common content, the ability to use snippets allows us to reuse that content and eliminate redundant efforts," Schatzke explains. "We've been able to drastically reduce project time since we no longer have to manually retype the content for every output."

Meanwhile, the technical communications team takes advantage of conditional tags to customize content for different versions of the user guides.

"Not only do we need to provide documentation for both the older and latest versions of each hardware and software product, we also need to provide different versions specific to the different operating systems that customers use," Schatzke says. "Thanks to conditional tags, we're able to flag what's unique for each of those product lines, and then tailor certain sections of the documentation for the different versions. Flare makes it easy for us to support different groups of users with minimal effort and maximize productivity at the same time."

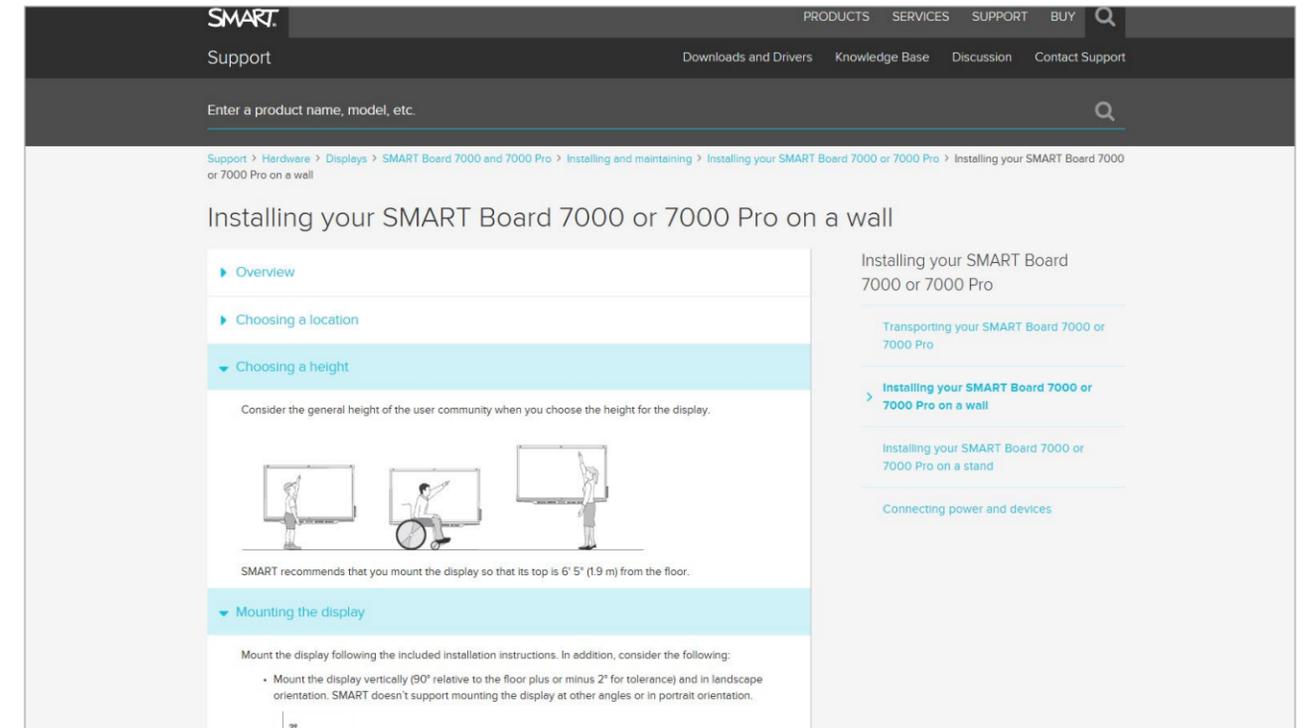
To ensure content quality, SMART Technologies also uses MadCap Analyzer, which is fully integrated with MadCap Flare. It analyzes SMART's Flare-based documentation to help find issues, such as broken links and unused conditions, and then makes recommendations for correcting them.

Meanwhile, the MadCap support team has also contributed to SMART Technologies' success with its documentation.

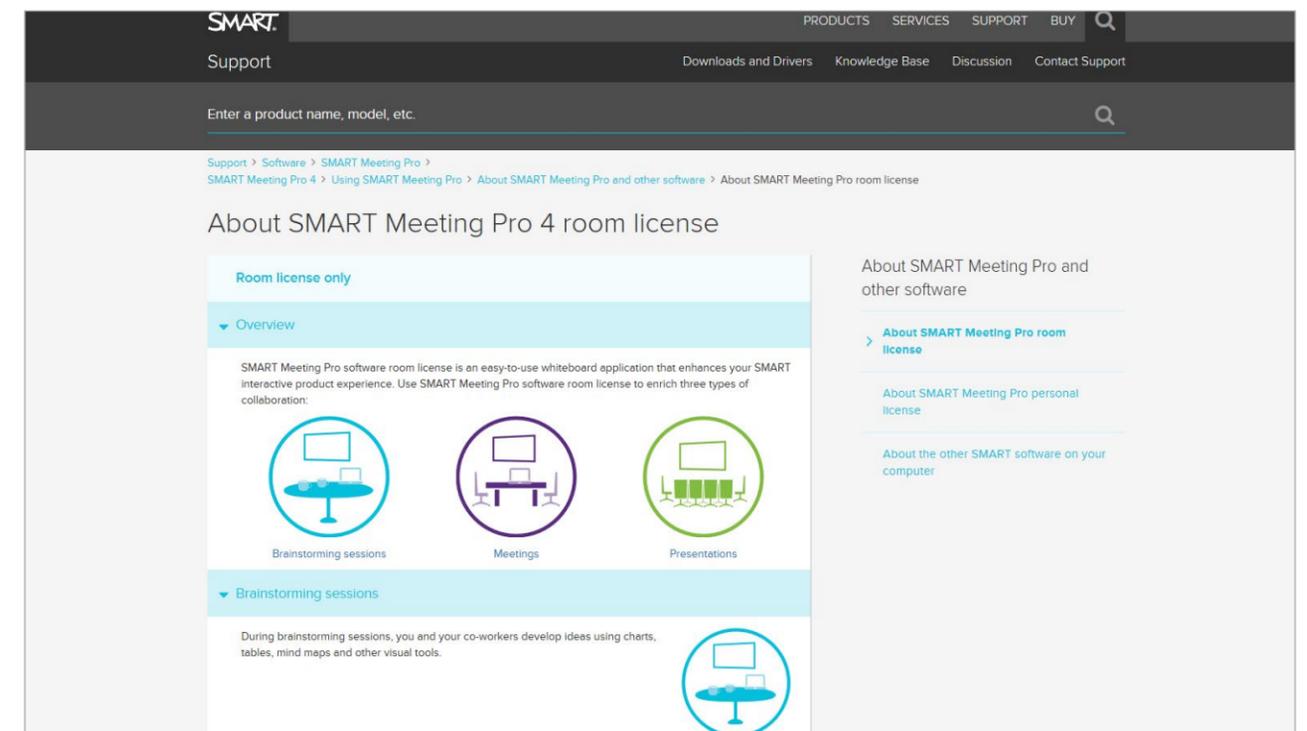
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KEN SCHATZKE

Senior Technical Writer | SMART Technologies



SMART Technologies' Support Site, Created with MadCap Flare



SMART Technologies' Support Site, Created with MadCap Flare

“MadCap support has been really helpful. We get a response from them within a day when we submit support tickets,” Schatzke observes. “It’s really rare where we’ve raised an issue and it hasn’t already been solved at some point in MadCap’s roadmap.”

 The biggest benefit of MadCap Lingo’s integration with Flare is it ensures that whatever formatting we have applied to our HTML5 Help and PDF files will come out exactly the same way in all other languages.

KEN SCHATZKE
Senior Technical Writer | SMART Technologies

Simplifying Translation Across Multiple Languages

Since SMART Technologies supports a growing number of customers around the world, it has experienced a need to translate more of its content. To deliver its documentation in various languages, SMART takes advantage of the tight integration between MadCap Flare and the MadCap Lingo computer-aided translation (CAT) tool.

“The biggest benefit of MadCap Lingo’s integration with Flare is it ensures that whatever formatting we have applied to our HTML5 Help and PDF files will come out exactly the same way in all other languages,” Schatzke explains. “As a result, we’re able to seamlessly generate those outputs into different formats for our global customers.”

Moreover, Schatzke notes, “With MadCap Lingo, we get a good sense about what content needs to be translated and what doesn’t, allowing our translator to be more efficient and have greater visibility into the translation process.”



Documentation Delivered in Multiple Languages with MadCap Lingo

Creating a Modern Web Experience

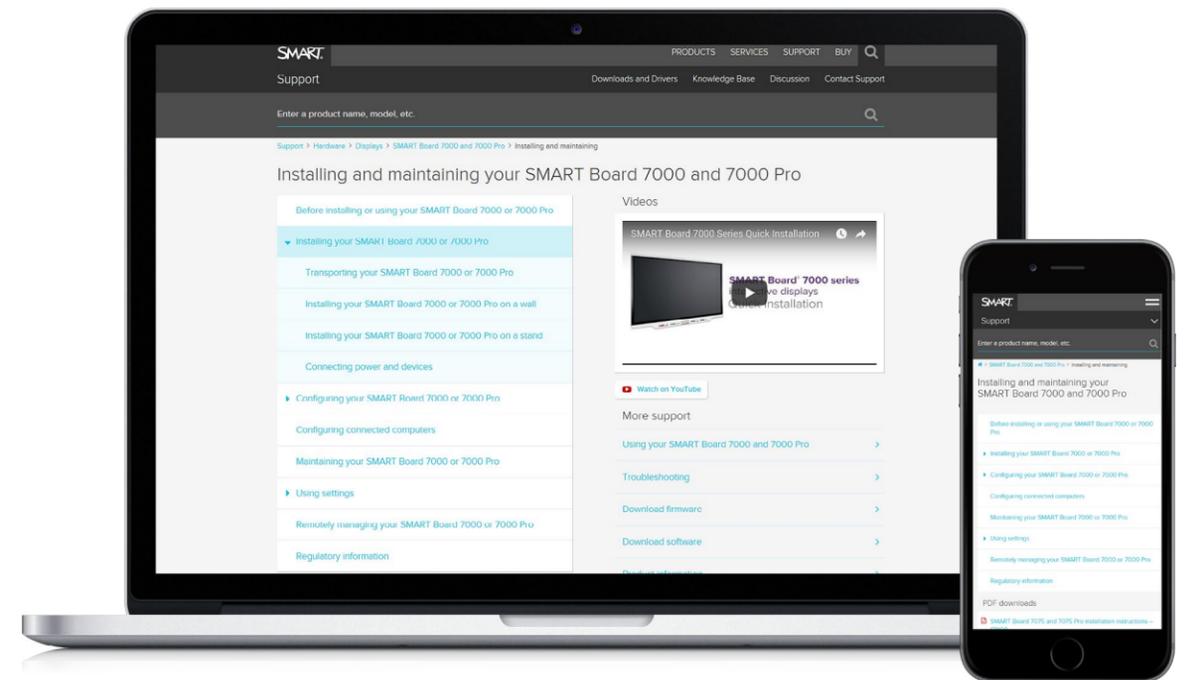
With the introduction of MadCap Flare, the technical communications team placed a priority on creating a modern, intuitive web experience for users, regardless of the device they use. Central to this effort has been the use of MadCap Flare’s responsive design functionality in enabling online documentation to automatically adjust to users’ screens—from desktops, to notebooks, smart phones, and tablets.

“Flare’s HTML5 responsive design feature is great,” Schatzke says. “The ability to deliver a properly proportioned view of our online documentation, whether it’s on a tablet screen or a monitor, allows our customers the flexibility to access content however they want.”

More recently, SMART Technologies requested that the technical communications team integrate its documentation with the company’s support site. Using Flare’s skinless output for HTML5, the team has been able to give Flare output a look and feel that matches the support site.

“The HTML5 skinless output made it really easy for us to produce an output from Flare that we could integrate into the rest of the product support site, which has helped us to maintain a consistent brand experience for our customers,” Schatzke noted.

“Overall, Flare’s HTML5 output has been instrumental in helping us to integrate our documentation



Support Site Menu Display on Desktop and Mobile



Flare’s HTML5 responsive design feature is great. The ability to deliver a properly proportioned view of our online documentation, whether it’s on a tablet screen or a monitor, allows our customers a whole new level of flexibility to access content however they want.

KEN SCHATZKE

Senior Technical Writer | SMART Technologies

into the support site,” Schatzke adds. “Now that all of our product documentation is in one place, customers are able to find what they’re looking for much more quickly than in the past when content was scattered in separate PDF files and Help outputs.”

Enhanced, Interactive Online Documentation

The SMART technical communications team works to enhance the experience of customers in other ways. Among these features are support for integrated multimedia, feedback links, drop-down text, and search functionality.

“MadCap Flare’s ability to embed YouTube videos into the content on our support site allows us to provide a more interactive and enriching learning experience for customers,” Schatzke observes. “Being able to have a YouTube frame on our pages where we can integrate videos is a testament to the rich functionality of Flare.”

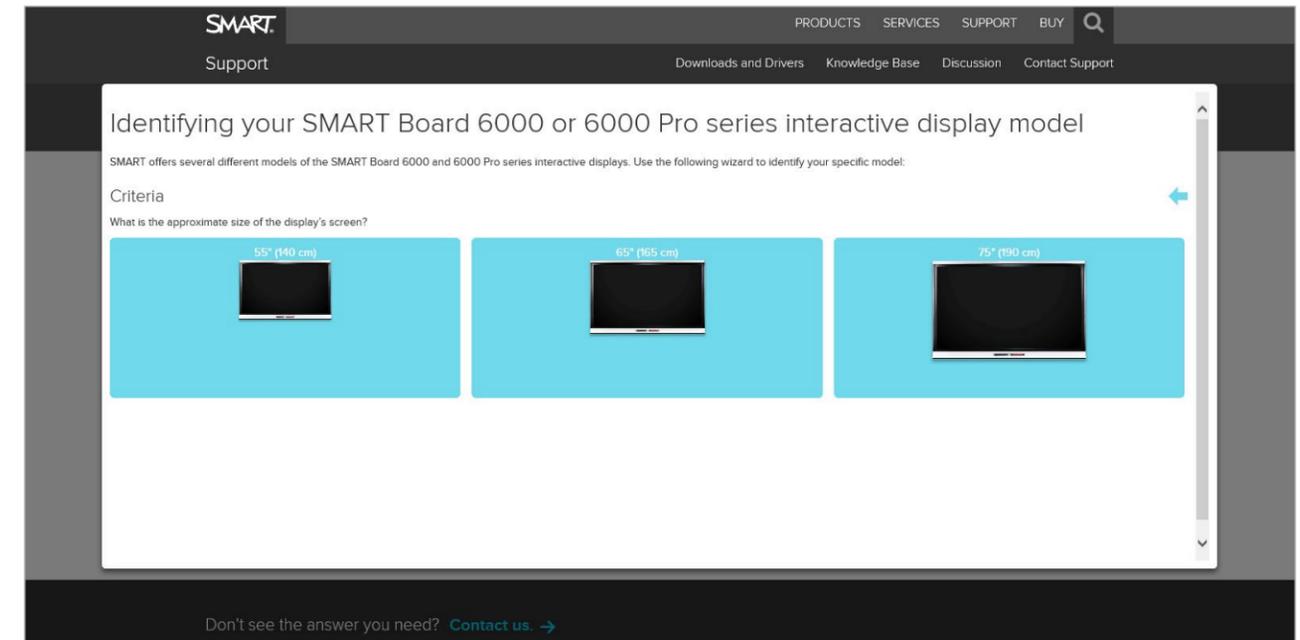
SMART Technologies also takes advantage of MadCap Flare’s support for custom JavaScript to insert custom feedback links in online outputs.

“Using Flare, we’ve been able to add a feedback link to most of our pages, which allows users to easily respond from within whichever page they are in,” Schatzke explains. “It has really helped to engage customers, and we’ve gotten 800 responses just within the last month!”

Meanwhile, to help users easily navigate through the support site, the writers use the drop-down text feature in Flare.

“Each page in our support site is organized into drop-downs with an overview at the beginning. Users can get an overview of the content and then expand the appropriate drop-downs if they want more information,” Schatzke says. “Customers love having the ability to expand and collapse a section of content. It allows them to find information quickly and control what they want to see.”

Additionally, the technical writing team uses the frameless feature of HTML5, which enables



Interactive Online Documentation Enabled by MadCap Flare

search engines, such as Google, to easily access the content, further simplifying users’ access to information.

“With Flare’s robust HTML5 frameless approach, we’ve found that our support site content has been showing up more frequently in Google and other search engines,” Schatzke observed. “This has been a huge plus for customers since it’s a key means for them to find content.”

Additionally, the team uses MadCap Capture, which is also integrated with MadCap Flare, to generate screen captures and graphics to support the documentation.

“MadCap Capture is terrific—we can insert text into our screen captures or graphics, and then send that text to our translators to translate without them having to use an actual graphic tool,” Schatzke said.

Looking ahead, Schatzke noted, “The advanced features and power of MadCap’s software have reshaped how we deliver documentation to our customers, and we look forward to exploring how we can further take advantage of the capabilities provided by MadCap Software.”



For more case studies on ways smart companies are increasing productivity, reducing costs, and streamlining content delivery, visit:

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