Apteco
INSIGHT INTO ACTION

Global Analytics Company Apteco Reduces Customer Support Calls and Cuts Time to Deliver Modern Self-Service Online Help and Documentation in Multiple Languages Using MadCap Flare and Madcap Central

Cut the Time to Translate Content from Weeks to Days

🌐 www.apteco.com

📍 Warwick, Warwickshire, United Kingdom

INDUSTRY   Software

For more than 30 years, Apteco Limited has been helping companies to understand their customers and foster powerful relationships through industry-leading software that rapidly converts customer data into actionable information. Now over 3,700 users at 400 organizations worldwide rely on Apteco FastStats® systems, supported by an international partner network of more than 100 marketing service providers in the United Kingdom, Europe, North America and Australia.

To support customers and partners in optimizing their use of Apteco FastStats and other products in the Apteco Marketing Suite, the company delivers documentation in both a responsive HTML5 format and PDFs. Today, Apteco takes advantage of the single-source authoring and multi-channel publishing capabilities in MadCap Flare to produce this content, along with the cloud-based collaboration and analytics provided by MadCap Central.

GOALS

- Create a modern Help website to support Apteco's move to cloud-based capabilities with its Apteco Orbit platform.

- Empower partners and customers to quickly and easily find the information they need.

- Enable Apteco's Help content and documentation to keep pace with the company's bi-weekly product releases.

- Streamline the translation of Help content and documentation from English to German.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software

- MadCap Central for cloud-based collaboration and analytics

BENEFITS

- **Modern web experience**: Apteco relies on MadCap Flare to deliver a modern, web-based Help featuring a responsive HTML5 format and a multimedia experience via videos, animated GIFs and high-resolution SVG images.

- **User self-support**: Side navigation, advanced search functionality, and microcontent help in MadCap Flare and Analytics in MadCap Central help customers and partners to quickly find answers to their questions, leading to a reduction in support calls.

- **Agile content delivery and collaboration**: Apteco technical authors can deliver new Help content and documentation the same day as each bi-weekly software release by using topic-based authoring, snippets, and conditions to maximize content reuse, as well as leveraging MadCap Central to efficiently obtain feedback from SMEs.

- **Faster translation**: Apteco has cut the time to translate content from English to German from weeks to 2 days or less by using MadCap Flare snippets to send only new or changed content for translation and relying on MadCap Central to collaborate with Apteco's translators.

Moving to Cloud-Based Delivery

For years, Apteco had relied on MadCap Flare to produce local WebHelp and PDFs for FastStats, which ran locally on clients' personal computers. However, a knowledge base supporting the company's product suite was in a portal built using the Drupal open-source content management system (CMS). Although the Drupal portal enabled all of Apteco's developers and support consultants to collaborate in creating documentation, there was no control process in place—leading to inconsistent formats and duplicate documents. Additionally, the portal was behind a secure firewall that required a secure login.

"Each time a build was done, the PDFs would get published to the Drupal portal, and if partners and customers wanted to access them, they would have to login," recalls Tony Dzumaga, technical author at Apteco.

More recently, the team began rethinking their documentation strategy to align with the introduction of Apteco Orbit, the cloud-based platform at the center of all new Apteco software. Over time, Apteco Orbit™ is incorporating all the capabilities of Apteco FastStats for analysis, Apteco PeopleStage™ for marketing campaigns, and other products in the product suite.

"We needed a sustainable, scalable, modern system that could stay up to date with changes in delivery platforms and provide responsive branded online Help. The content had to be web-based, indexable and searchable," Tony explained. "At the same time, we wanted it to be collaborative, so we could retain the ability to let everybody contribute. We have also been deciding on a support provider, so we required a system that could integrate with third-party customer support systems."

In looking at how to create its new web-based Help system, the Apteco team decided to first review the capabilities of their existing software. They quickly determined that MadCap Flare could support all of these needs.

> I evaluated Flare and found it was the most flexible platform using up-to-date modern web standards. The quality of published resources and the webinars and conferences from MadCap Software, and the fact that I enjoyed using Flare made it the obvious choice.

TONY DZUMAGA
Technical Author | Apteco
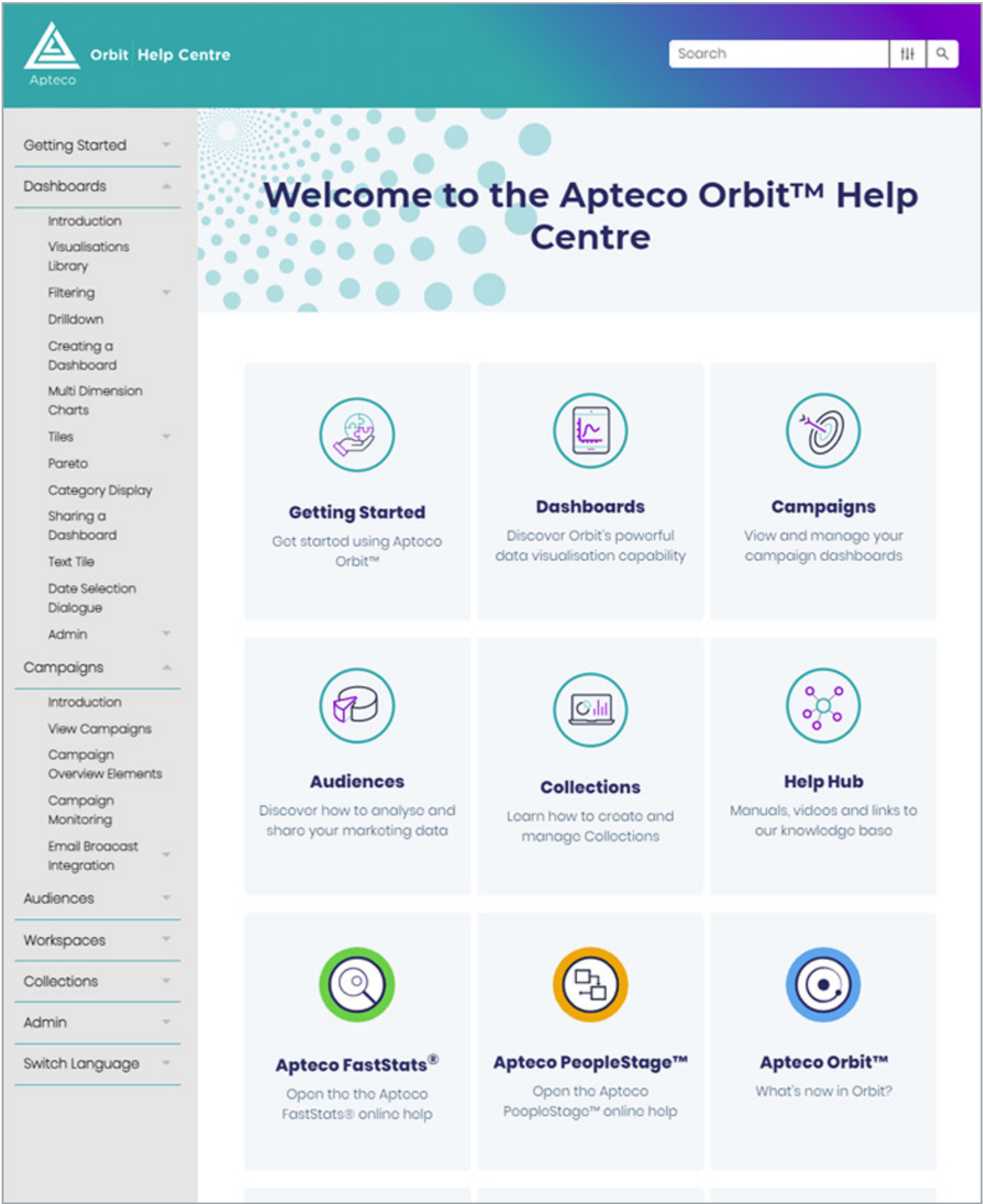
Apteco uses MadCap Flare to deliver modern self-service online help for Apteco Orbit™ in both English and German.

madcap software   SUCCESS STORY: Apteco

Get Started on a Free-30-Day Trial Today at www.madcapsoftware.com
info@madcapsoftware.com | +1.858.320.0387 | Toll-Free US/Canada: +1.888.623.2271

Keeping Pace with Agile Software Releases

Today, Apteco uses MadCap Flare to deliver modern Help websites and PDFs for Apteco Orbit™ in English and German; Apteco FastStats, Apteco PeopleStage™, Apteco Designer, and the Apteco Help-Hub are in English only. The company uses one cascading style sheet (CSS) file in MadCap Flare across all its Help projects, and each project imports a small site-specific CSS file, an approach that makes it easy to style all of the Help. Additionally, all Help projects are published on Apteco's intranet as the team works on them—relying on topic-based authoring, snippets, and conditions featured in MadCap Flare to facilitate content reuse.

"The topic-based authoring and snippets used in our Flare-based Orbit Online Help mirror the modular nature of the Orbit development process. So, when the development team changes something, I only need to change a small amount," Tony explains. "In addition to using snippets extensively, we take advantage of conditions in Flare to reuse content. For example, we recently single-sourced conditions and snippets for documentation for 25 different email integrations using conditions and snippets to produce the different outputs."

The ability to reuse content helps the team keep pace with the company's frequent software releases. Apteco Orbit™ alone gets feature updates every two weeks, and with MadCap Flare Apteco can publish updated Help and documentation the same day as each new release.

> Our bi-weekly Orbit releases go out on Monday, and with Flare I'm able to have most of what I need documented, so I just need to finish screen captures, and I can release our Help with the product.

TONY DZUMAGA
Technical Author | Apteco

"Our bi-weekly Orbit releases go out on Monday, and with Flare I'm able to have most of what I need documented, so I just need to finish screen captures, and I can release our Help with the product," Tony notes. "Customers are really happy to find Help available for the new Orbit features, and we are seeing a notable reduction in support calls."

Apteco continues to move more content from the Drupal knowledge base into the MadCap Flare project. By first exporting the Drupal-based content into a Markdown format, the team is able to have it almost seamlessly imported into MadCap Flare.

MadCap Central for Facilitating Collaboration, Translation and Analysis

Collaboration is a top priority at Apteco. Subject matter experts (SMEs) use Markdown functionality to contribute content that is then integrated into MadCap Flare. Additionally, these SMEs can review and provide feedback through MadCap Central, a cloud-based collaboration and publishing platform designed and integrated to work directly with MadCap Flare content.
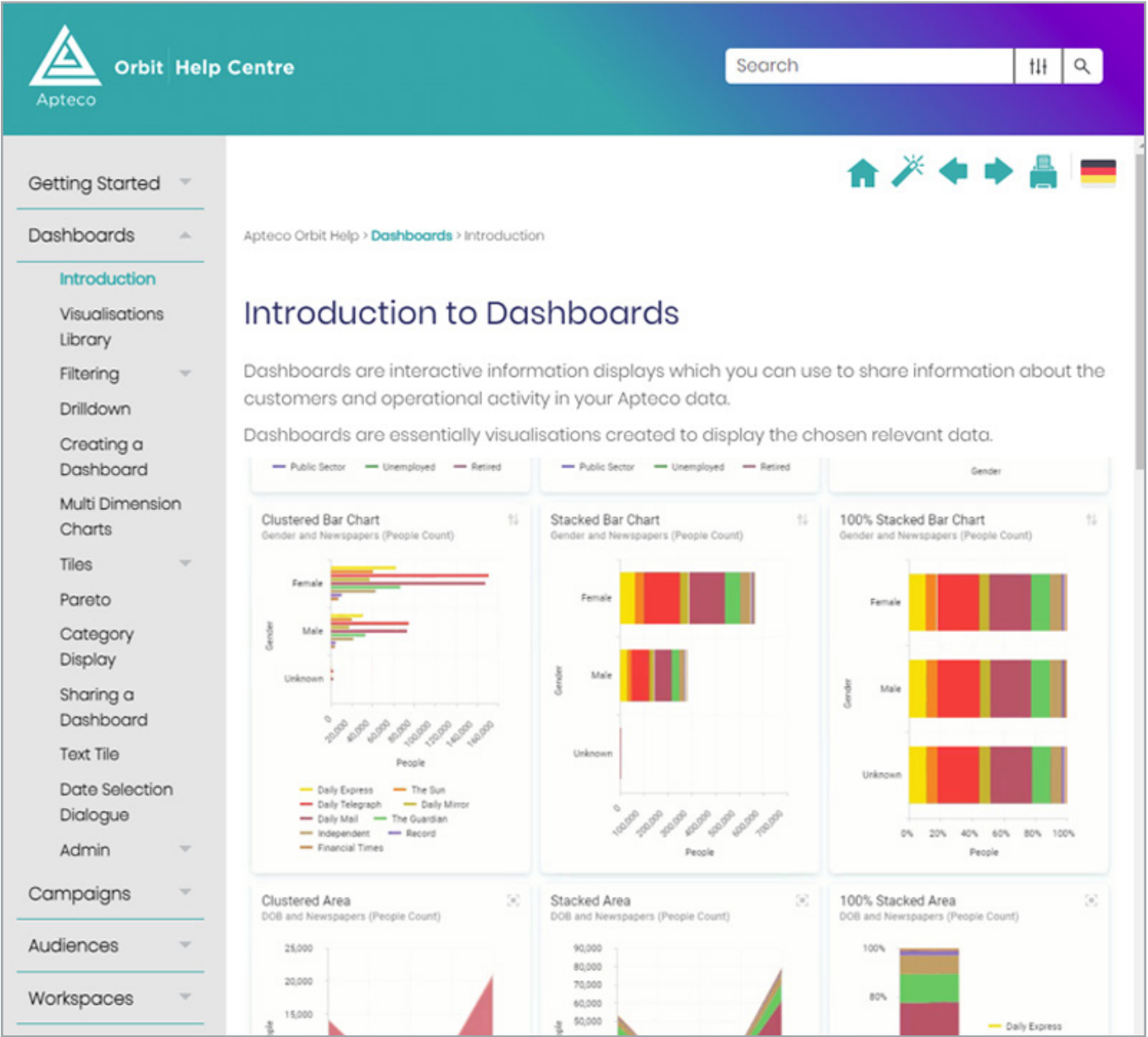
Built-in analytics provided by MadCap Central allows Apteco to share dashboards showing their Help usage to product managers, so that they can better understand their customers' interests and needs.

> ❝ With MadCap Central, we have achieved the mechanism to collaborate while maintaining consistent formatting, which we could not do using the Drupal CMS. ❞

TONY DZUMAGA
Technical Author | Apteco

"With MadCap Central, we have achieved the mechanism to collaborate while maintaining consistent formatting, which we could not do using the Drupal CMS," Tony noted. "Our technical authors can write the content, and then we just send it out through Central to have our SMEs confirm that everything is technically correct."

Collaboration extends to working with Apteco's German translation team, since the company maintains a German MadCap Flare project that mirrors the English one. To facilitate translation from English to German, technical authors take advantage of both MadCap Central for review and MadCap Flare snippets.

> ❝ In the past, we'd produce a document in Microsoft Word and then send it to the German team to translate, and that would take weeks. Now I just use MadCap Central to send snippets of the Flare content that are new or have changed, and we get the translations back in one or two days. ❞

TONY DZUMAGA
Technical Author | Apteco

The Apteco Orbit™ platform, itself recognizes the locale of the operating system, whether it is English, German, Australian English, or Dutch. In addition to the current English and German versions of Orbit online Help and documentation, the team plans to add versions of this content for Australian English first and then Dutch to align with the platform.

Beyond collaboration, Apteco also utilizes the built-in analytics engine provided by MadCap Central, Tony explains: "Because we're an analytics company, I've imported data from the MadCap Central Analytics page into our Orbit. We will share dashboards showing our Help usage with our product managers, so they understand our customers' interests and needs better."
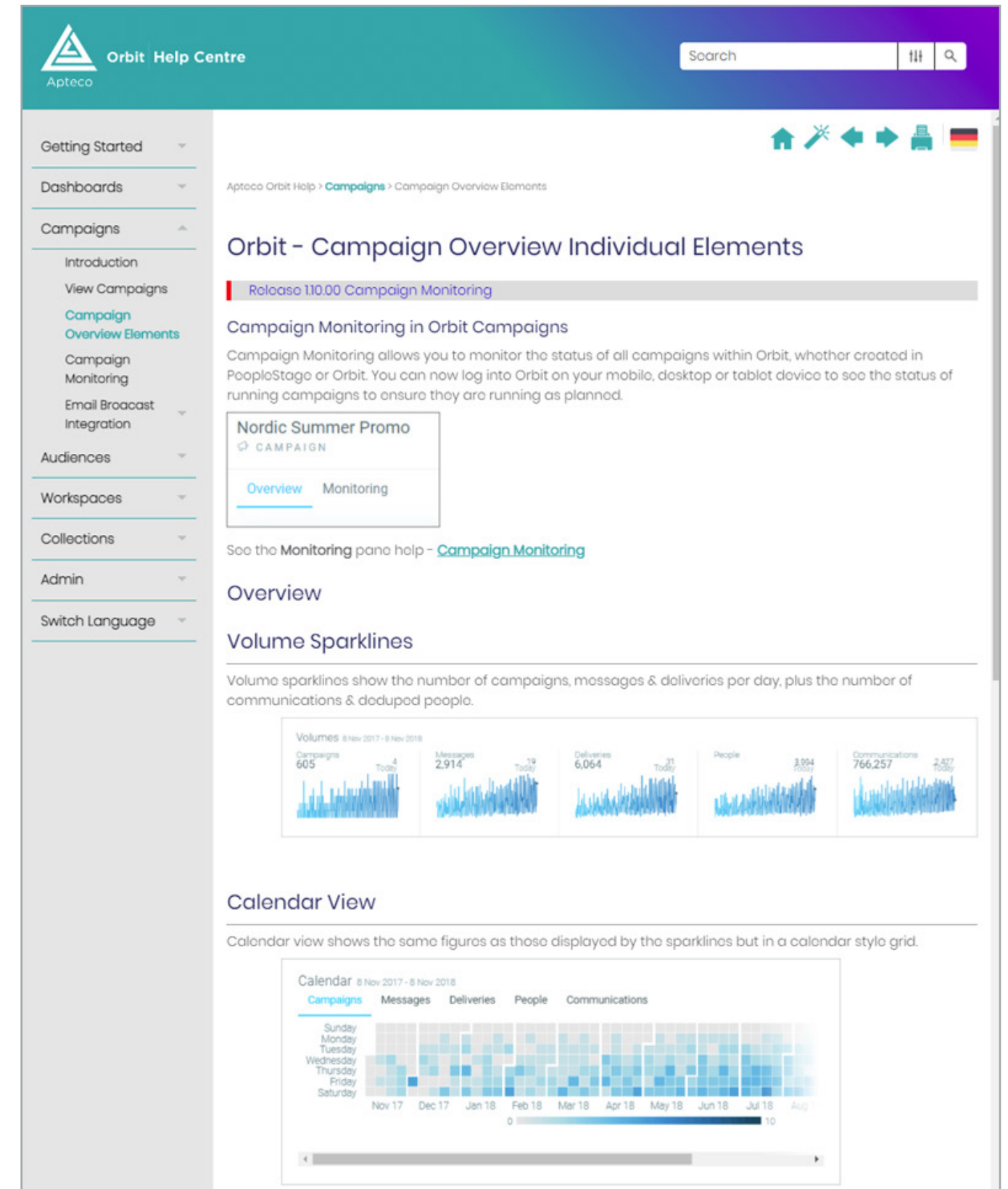
Apteco takes advantage of multiple features within MadCap Flare to help users quickly and easily find the information they need, including side navigation, advanced search functionality, and microcontent.

Creating an Intuitive User Experience

One of Apteco's key objectives has been to create a modern web experience for customers and partners when they use the company's web-based Help. To do so, the team delivers its Help content in a responsive HTML5 web portal that adjusts to users' screens.

"The responsive HTML5 format enabled by Flare looks great on mobile devices and tablets. I really like the way that it works," Tony says.

The web-based Help also takes advantage of multiple features within MadCap Flare to help users quickly and easily find the information they need, including side navigation, advanced search functionality, and microcontent.

> Moving our Help to the web in a searchable format and adding functionality like microcontent with Flare has reduced the amount of support calls, and we regularly get positive feedback about this.

TONY DZUMAGA
Technical Author | Apteco

"I like to put short descriptions in microcontent using Flare so that when people search for something, they know if they're on the right track and can then drill down to the topic," Tony notes. "Moving our Help to the web in a searchable format and adding functionality like microcontent with Flare has reduced the amount of support calls, and we regularly get positive feedback about this."

To augment text-based information, Apteco uses MadCap Flare to integrate videos and animated GIFs into the web-based Help in addition to high-resolution graphics using scalable vector graphic (SVG) files. Because MadCap Flare and SVG files are based on XML, the integration is very straightforward. The team also relies on MadCap Flare's CSS functionality to maintain style sheets that align with the corporate brand.

> It's been an absolute joy to work with Flare and the control it provides using CSS. We've used it to implement fonts, SVGs, branding and colors as variables to ensure consistency.

TONY DZUMAGA
Technical Author | Apteco

Aligning with Support

Recently, Apteco has developed Help-Hub, a web-based center for all technical documentation, including release notes, social integration, technical installation, and company email, among others. Going forward the company may move the knowledgebase to Help-Hub, as well.

Apteco is also in the process of selecting a support platform, and the team has been testing Salesforce, ServiceNow and Zendesk, all of which integrate with MadCap Flare. Once in place, the company will look at integrating its MadCap Flare-based documentation with the support platform.

> One of the attractive features about Flare is its plugin support for the major support solutions. I tried one of the MadCap plugins not long ago with our support team, and it went very well.

TONY DZUMAGA
Technical Author | Apteco

Tony added, "Flare has been instrumental in allowing us to modernize our online Help and documentation. Absolutely everything that Flare lets you do, we've made use of, and we look forward to extending our use of Flare and Central as our Help and documentation evolve."

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

www.madcapsoftware.com/successstories

madcap software

SUCCESS STORY: Apteco

Get Started on a Free-30-Day Trial Today at **www.madcapsoftware.com**
info@madcapsoftware.com | +1.858.320.0387 | Toll-Free US/Canada: +1.888.623.2271