



Online Trading Academy Relies on MadCap Software to Deliver Modern, Interactive Help Website with Micro Content, Advanced Search and Multimedia for State-of-the-Art Trading and Analysis Platform



**Saved Countless Hours
Authoring Content**

 www.tradingacademy.com

 Irvine, CA

INDUSTRY Online Trading Education

When individual investors or traders want to learn how to use techniques similar to those of professional traders on Wall Street, many turn to Online Trading Academy (OTA), a world leader in financial education for trading and investing in financial markets. OTA's proprietary, step-by-step Core Strategy methodology teaches strategies designed to help traders and investors make smarter decisions aligned with their short-term and long-term financial goals. Founded in 1997 at a single location in Irvine, CA, Online Trading Academy has since expanded to more than 40 worldwide education centers and has served over 80,000 students with access to lifelong education.

OTA students learn from knowledgeable instructors in an interactive classroom setting with extensive online education resources and a next-generation education, analysis and trading platform called CliK. To ensure that students can take advantage of the extensive capabilities provided by CliK, the company delivers Help via a modern website featuring micro content that offers short, concise answers to common questions. Today this website is delivered using MadCap Flare for single-source content creation, MadCap Central cloud-based analytics and version control, and MadCap Capture for screen capture and image editing.

GOALS

- Create a modern Help website that complements OTA's leading-edge CliK analysis and trading platform.
- Optimize the search experiences of students and internal users of CliK, alike.
- Ensure content keeps pace with new classes and updates to the CliK platform.
- Support audits required for education in the online trading sector.

SOLUTIONS

- MadCap Flare native XML single-source, multi-channel content authoring software
- MadCap Central for cloud-based publishing and content management
- MadCap Capture for screen captures and image editing

BENEFITS

- **Modern Help Website:** Using MadCap Flare, OTA delivers an interactive, HTML5-based Help website with modern features, such as a carousel on the landing page and images created with MadCap Capture.
- **Optimized Search Experiences:** Micro content featuring text plus graphics and short videos, along with rich search functionality, enable users to quickly find the information they need. Analysis provided by MadCap Central helps OTA tune search terms to further assist users.
- **Streamlined Content Delivery:** With MadCap Flare, content reuse is enabled by topic-based authoring, conditional text, and snippets, and Analysis of content to suggest improvements prior each build helps the team to keep pace with the rapid delivery of new classes and CliK capabilities.
- **Support for Audits:** Version control in MadCap Central allows OTA to easily track and document versions of the Help website to meet regulatory requirements and audits.

Needed: Web-based Help for New Online Platform

Education is OTA's only objective, unlike the training provided by many brokers that make money every time customers make a trade, whether they are successful or not. For more than two decades, OTA delivered classes based on its proprietary methodology using a number of third-party platforms. However, the company made a strategic decision to create CliK, its own platform, which would support this methodology and maintain all of OTA's classes and educational content.

By late 2018, the new CliK platform was in place and being used by OTA's employees. The next step was to create web-based Help that would assist students in using the platform for their classes. Because OTA's CliK product manager had used MadCap Software's products in the past, the company moved quickly to evaluate the solutions' capabilities, confirm that they would meet OTA's requirements, and begin developing the Help website. Then, in January 2019, the company started adding classes to CliK and using the platform to interactively teach students.

"I have been using MadCap Software's products for more than a decade, so when I came to OTA, I proposed that the company explore its products for our online help," said Sandra Claar, CliK product manager at Online Trading Academy. "Our analysis confirmed that MadCap provided the best products for our needs."

Streamlining Content Delivery

OTA's educators have now taught thousands of students using the CliK analysis and trading platform. Today, the company documents the CliK platform using MadCap Software's solutions to deliver a modern website based on HTML5. The Help website features more than 7,500 files of information about the CliK platform and how to use it as part of the eLearning and live classes provided by OTA. In addition to students, OTA departments also use the Help website to train employees on new features in CliK.

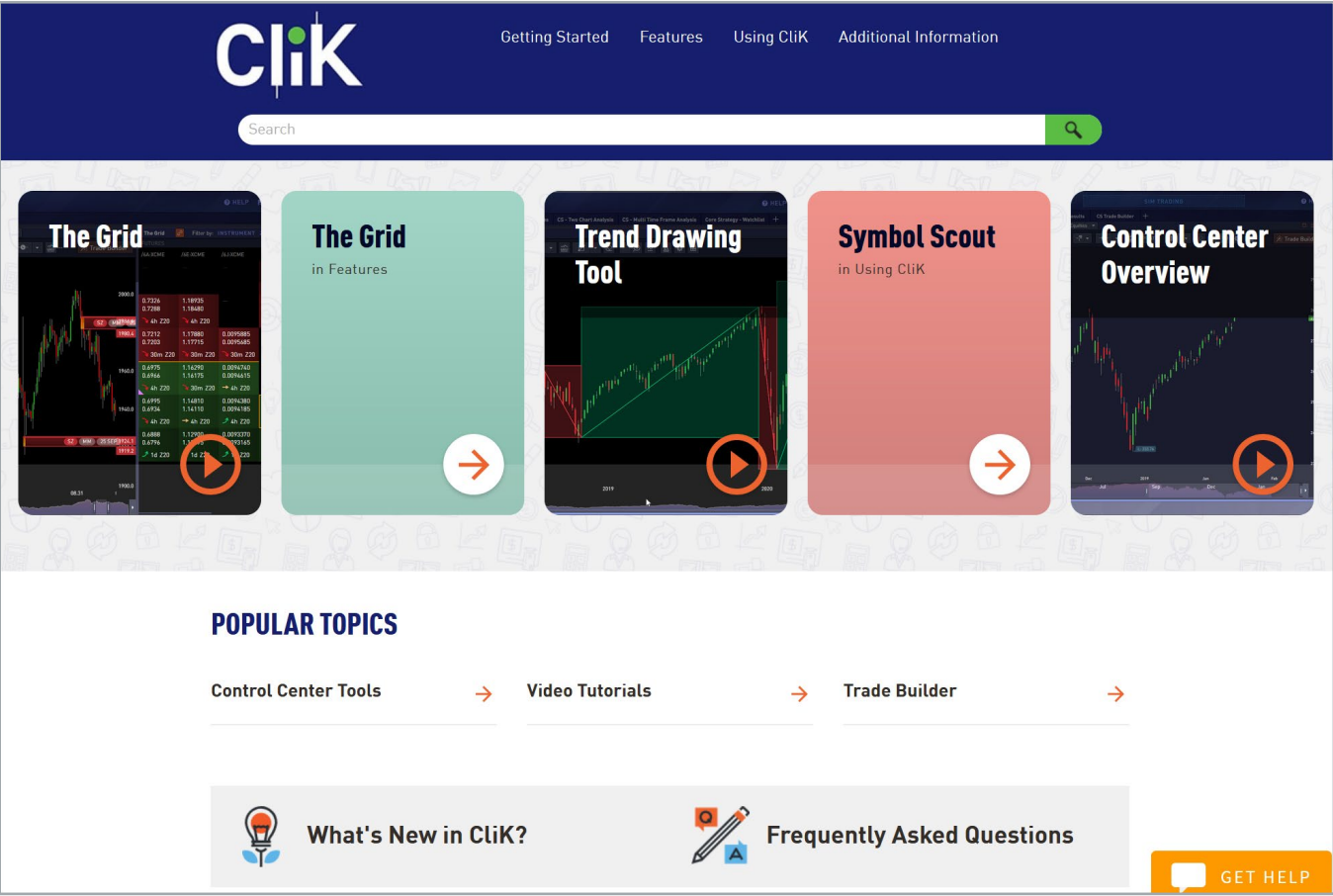
"Using MadCap Software's products, I can honestly and proudly say that I have never missed a software release update—even when those deadlines were incredibly tight," Sandra notes.



Using MadCap Software's products, I can honestly and proudly say that I have never missed a software release update—even when those deadlines were incredibly tight.

SANDRA CLAAR
CliK Product Manager | Online Trading Academy

To ensure that the documentation updates keep pace with the continuing evolution of the classes and new CliK features, OTA relies on the topic-based authoring, conditional text, and snippets capabilities in MadCap Flare. Notably, the team creates copies of the topics that will change extensively in the next release, which are kept separate from the published Help and are updated as the developers provide more information. Once a topic is complete, the team can replace the old version in the Help build.



The Help website features more than 7,500 files of information about the CliK platform and how to use it as part of the eLearning and live classes provided by OTA



Topic-based authoring with Flare has saved me countless hours as the CliK software platform that I document has extensive changes in every release.

SANDRA CLAAR

CliK Product Manager | Online Trading Academy

“Topic-based authoring with Flare has saved me countless hours as the CliK software platform that I document has extensive changes in every release,” Sandra explains. “I also love that if I must use the same text in multiple areas, I can create a snippet with Flare, and if I have to change a snippet, it changes in every instance.”

OTA also makes extensive use of the MadCap Flare table of contents (TOC) functionality to create TOCs for the Help website and for specific groups, creating and testing them while the original content is live.

“Being able to make multiple TOCs with Flare lets me publish at a fast pace,” Sandra notes. “Plus, I can easily create a special TOC that includes only part of the topics for use with special audiences, such as when we review specific topics with our technical support team.”

Improving Content Quality and Control

The CliK team relies on the analysis capabilities within both MadCap Flare and MadCap Central to improve the Help website’s content. The MadCap Flare Analysis feature reviews the content, identifies issues, and recommends corrections.



Flare’s Analysis functionality makes checking for issues before I publish so much easier than other programs that I have used.

SANDRA CLAAR

CliK Product Manager | Online Trading Academy

“Flare’s Analysis functionality makes checking for issues before I publish so much easier than other programs that I have used,” Sandra explains. “We sometimes have very tight publishing

deadlines, and Flare makes it easier to test and check that I have not included mistakes in the new build in order to meet those deadlines.”

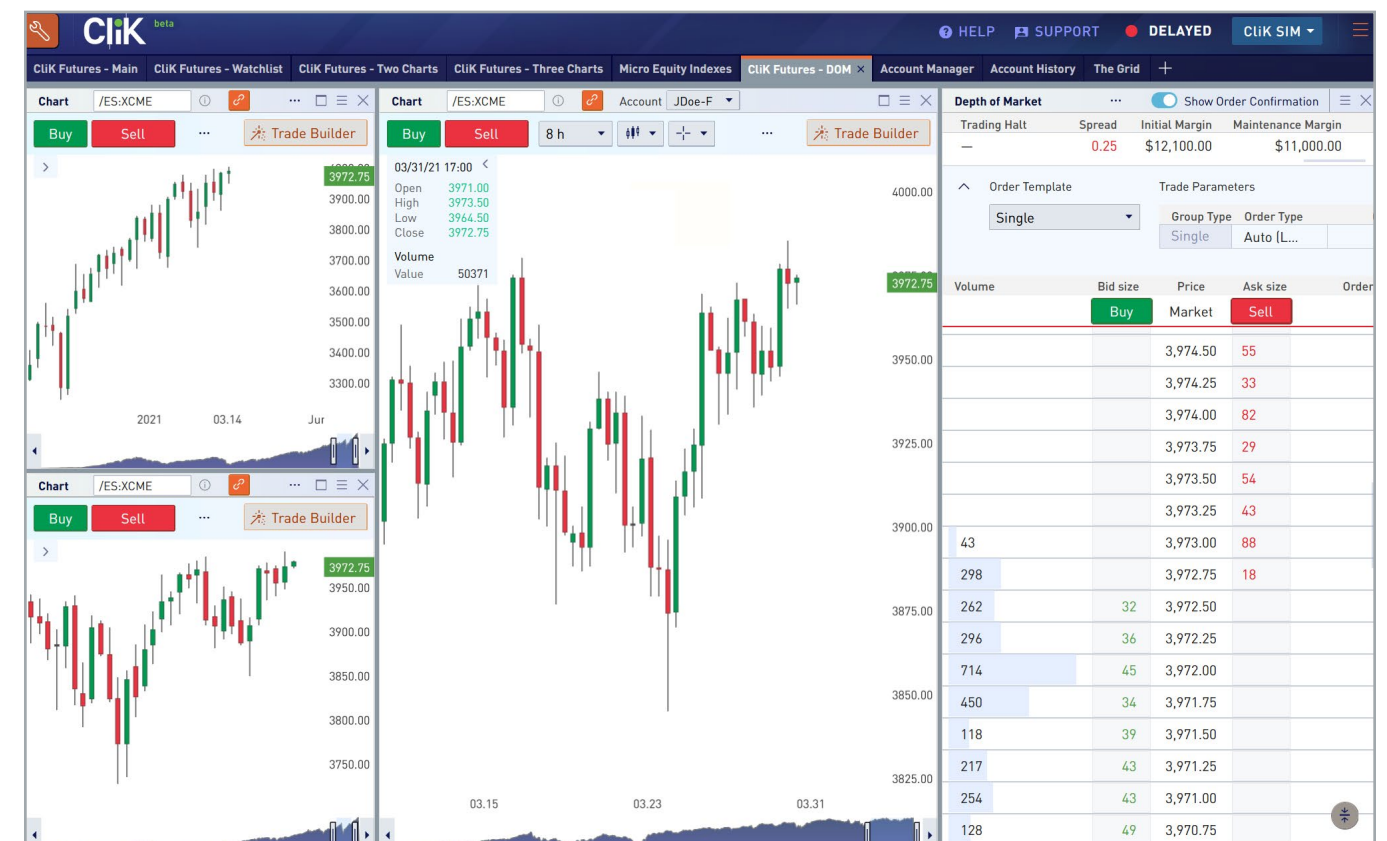
Meanwhile, the actionable user Analytics functionality in MadCap Central tracks user behavior, such as how many times users searched on a term, whether or not they succeeded in their search, and what articles they viewed. For example, OTA educates students on the use of Fibonacci studies and ratios in online trading, but MadCap Central’s analysis of these users’ experiences revealed that many could not find information on the CliK documentation site because they were misspelling the word. Using this insight, the OTA team was able to add search terms with the most common misspellings to help students find the articles they need.



I love that MadCap Central lets me view what our users have been entering into the search field, and if their searches are returning data. This is one of the best features MadCap Software provides.

SANDRA CLAAR

CliK Product Manager | Online Trading Academy



The CliK team relies on the analysis capabilities within both MadCap Flare and MadCap Central to improve the Help website’s content.

“Help is only useful when people can find the right information,” Sandra observes. “I love that MadCap Central lets me view what our users have been entering into the search field, and if their searches are returning data. This allows me to create changes and additions based on actual data for a continuous documentation improvement process. This is one of the best features MadCap Software provides.”

Additionally, OTA relies on the version control functionality in MadCap Central to meet regulatory requirements for documenting versions of the Help website.

Auditors will ask, ‘What was the version at that particular day? How can you prove it?’. MadCap Central makes keeping track of the versions easy, so we can validate our responses.

SANDRA CLAAR
CliK Product Manager | Online Trading Academy

Creating a Modern Web Experience

OTA has been committed to creating a modern web experience that provides an intuitive, easy-to-navigate experience for users. The company relies on the search capabilities in MadCap Flare, which goes beyond the search functionality of Google to let users search on terms that the CliK team adds to the index file. Additionally, OTA uses MadCap Flare to create micro content that is presented as the top result for relevant searches.

I absolutely love the micro content feature in Flare. I can publish a little micro content and even include pictures and videos, and then point users to where they can find more information. I’ve had people stop me in the halls and tell me how helpful the micro content is for them.

SANDRA CLAAR
CliK Product Manager | Online Trading Academy

“I absolutely love the micro content feature in Flare. I can publish a little micro content and even include pictures and videos, and then point users to where they can find more information,”

Sandra says. “I’ve had people stop me in the halls and tell me how helpful the micro content is for them. And I like that I can add more value to our Help website with the micro content—without purchasing additional products.”

Moving forward, OTA is investigating the use of micro content to build context-sensitive Help, as well as create a chatbot that would be available to assist with common questions when support is not open.

“By using Flare’s micro content to provide chatbots on our Help website, we will be able to give our students more 24/7 support,” Sandra notes.

CliK

Getting StartedFeaturesUsing CliKAdditional Information

Search

You are here: Using CliK > Options > Option Chain > Using the Option Chain

Using the Option Chain

The main reason for the option chain is to select an expiration, a strike price, and to place an option trade. Placing an option trade can be completed in several ways.

Using the **AIG** example to select a call to purchase, select an expiration date that is close to 90 days left of trading. The expiration date that is closest to 90 without going way over it is February 21, 2020, with 82 days left of trading. It is a Standard (monthly expiration). Expand that section (by clicking on the row with the February 21, 2020 date in it) to see the strikes listed below it.

Options MainOption ChainOptions AnalysisOptions Trade ManagerOptions Trade HistoryOptions - All-In-One

Option Chain

AccountJDoe-E

Net Chng-0.23

Bid52.40

Ask52.90

Qty0

Volume2,865,501

Open52.84

High53.17

Low52.59

SpreadSingle

StrikesAll

AnalyzeFilters

CALLS

Delta

IV

Theo price

Bid

Ask

Strike

Bid

Ask

Delta

IV

Theo price

> 10 Jan 20

40

A

Weekly

> 17 Jan 20

47

A

> 21 Feb 20

82

A

0.99

56.79%

22.74

+

21.95

23.20

+

30

+

0.00

0.13

+

-0.01

53.58%

0.05

0.97

46.55%

17.79

+

17.10

18.20

+

35

+

0.00

0.24

+

-0.03

45.90%

0.12

0.94

37.96%

12.90

+

11.30

13.25

+

40

+

0.10

0.32

+

-0.05

36.24%

0.20

0.90

27.33%

8.02

+

7.70

8.30

+

45

+

0.33

0.41

+

-0.10

27.45%

0.37

0.70

22.80%

3.83

+

3.70

3.95

+

50

+

1.23

1.36

+

-0.31

24.27%

1.30

0.53

22.65%

2.37

+

2.27

2.43

+

52.5

+

2.18

2.31

+

-0.47

22.95%

2.24

0.36

21.42%

1.24

+

1.18

1.31

+

55

+

3.60

3.80

+

-0.63

22.68%

3.70

0.21

21.12%

0.60

+

0.53

0.67

+

57.5

+

5.45

5.70

+

-0.77

22.59%

5.55

0.12

21.88%

0.31

+

0.25

0.37

+

60

+

7.50

8.05

+

-0.86

24.23%

7.77

0.05

20.85%

0.10

+

0.06

0.14

+

62.5

+

8.65

11.55

+

-0.89

27.26%

10.18

0.04

23.59%

0.08

+

0.00

0.24

+

65

+

11.90

13.00

+

-0.91

31.39%

12.67

0.02

28.78%

0.06

+

0.00

0.13

+

70

+

17.55

17.95

+

-0.92

38.82%

17.66

0.01

32.52%

0.04

+

0.00

0.08

+

75

+

22.10

23.00

+

-0.93

45.59%

22.65

> 15 May 20

166

A

> 19 Jun 20

201

A

> 15 Jan 21

411

A

> 21 Jan 22

782

A

Show Order Entry

AnalyzeChart

OTA has been committed to creating a modern web experience that provides an intuitive, easy-to-navigate experience for users.

madcap
software

SUCCESS STORY: Otahq

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

In addition to micro content and search, OTA provides a carousel at the top of the Help website's home page, which highlights new features that users may want to learn about. The team also takes advantage of MadCap Capture for capturing and editing screenshots and other graphics. These images are embedded directly into the Help content. Meanwhile, users can access longer videos hosted on Vimeo via links on the Help website.



Capture helps me keep the screens current and saves me countless hours; it has become one of my favorite products.

SANDRA CLAAR

CliK Product Manager | Online Trading Academy

"When we change features in the software platform, one change can affect many images. Capture helps me keep the screens current and saves me countless hours; it has become one of my favorite products," Sandra explains.

With the core Help website for CliK up and running smoothly, the team at OTA is looking to expand the content it delivers using MadCap Software's products. The company is planning to release multiple versions of the CliK platform, which will require corresponding versions of the Help content. Additionally, to serve its customers worldwide, OTA will eventually begin offering its Help content in different languages. Further in the roadmap, the company sees potential for using MadCap Software to deliver additional types of content across the organization.

"In the past, I've relied on MadCap Software to create knowledge bases, requirements documentation, and standard operating procedures, Sandra says. "I can see the benefit to doing that here at OTA, too."



MadCap Software is the only software company I've worked with that has reached out to me just to ask how things are going and if there is anything they can do to help. Whatever steps we take next. I know the MadCap Software team will be there for us.

SANDRA CLAAR

CliK Product Manager | Online Trading Academy



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

www.madcapsoftware.com/successstories