



Project Management With MadCap

PRESENTED BY

Neil Perlin



WHO AM I?



- Neil Perlin - Hyper/Word Services.
 - Internationally recognized content consultant.
 - Help clients create effective, efficient, flexible content in anything from hard-copy to mobile.
 - Certified – Flare, Mimic, Viziapps, others.
 - Working in online since 1986, mobile since 1998, XML and CSS since 1999, apps since 2011.
 - Certified app development consultant and trainer.
 - Lynda.com® author of training for Flare, others.



OVERVIEW

- Why project and review management matters...
- Duh...
- Yet project and review management often get short shrift in the need to get the project done.
- But consider some war/horror stories...
 - Conditional tags gone wild...
 - Broken links...
 - Undocumented styles...
 - Unmanageable review comments...



OVERVIEW

- Flare, Central, and Contributor offer a variety of project and review management features.
 - Flare – Report, file tag, Analysis features, and writing a project description.
 - Central – Task management, review and contribution coordination features.
 - Contributor – Review and contribution coordination.



FLARE

- Report generator.
 - Built into Flare.
 - 128 different reports in 19 categories.
 - By category group or specific reports in a category.
 - Can be viewed online and discarded or archived, and printed.

FLARE

- Report generator.

The screenshot displays the FLARE Report Editor window. The interface includes a sidebar on the left with 'General' (selected), 'Styles', and 'Archive' tabs. The main area is titled 'Report Editor' and contains a 'Title:' field. Below this is a 'Tables:' section with four expandable categories: 'Bookmarks', 'Concepts', 'Condition Tags', and 'Content Files'. Each category has a 'Select all' checkbox and a list of specific report items, each with its own checkbox. At the bottom, there are three checkboxes: 'Select all', 'Skip empty reports', and 'Print report after generation'. A 'Report:' label is positioned above a large empty text box. To the right of this box are three buttons: 'Add To Archive...', 'Open in Browser', and 'Generate'.

Category	Item	Selected
Bookmarks	Broken Bookmarks	<input type="checkbox"/>
	Unused Bookmarks	<input type="checkbox"/>
	Used Bookmarks	<input type="checkbox"/>
Concepts	Concept Links	<input type="checkbox"/>
	Topics With Concept Links Missing a Concept	<input type="checkbox"/>
	Used Search Filters	<input type="checkbox"/>
	Files with Concepts	<input type="checkbox"/>
	Topics Without Concepts	<input type="checkbox"/>
Condition Tags	Applied Conditions	<input type="checkbox"/>
	Undefined Condition Tags	<input type="checkbox"/>
	Files With Condition Tags	<input type="checkbox"/>
	Unused Condition Tags	<input type="checkbox"/>
	Files With Snippet Conditions	<input type="checkbox"/>
Content Files	Empty Content Folders	<input type="checkbox"/>
	Files With Changes	<input type="checkbox"/>
	Files With Equations	<input type="checkbox"/>
	File Word Count	<input type="checkbox"/>
	Files with Concepts	<input type="checkbox"/>
	Files With File Tags	<input type="checkbox"/>
	Files With Annotations	<input type="checkbox"/>

☐ Select all
☐ Skip empty reports
☐ Print report after generation

Report:



FLARE

- Report generator.
 - Demo

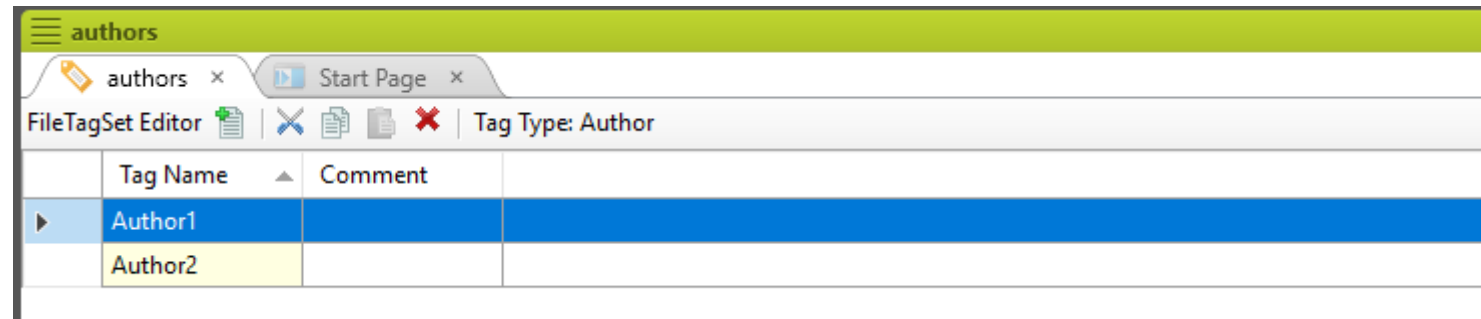


FLARE

- File tags.
 - 128 predefined reports is good but what if the one you need isn't there?
 - Create your own using file tags.
 - Your own keywords that you can create, assign to any element in a project – topics, snippets, etc.
 - Can then search for and report on.

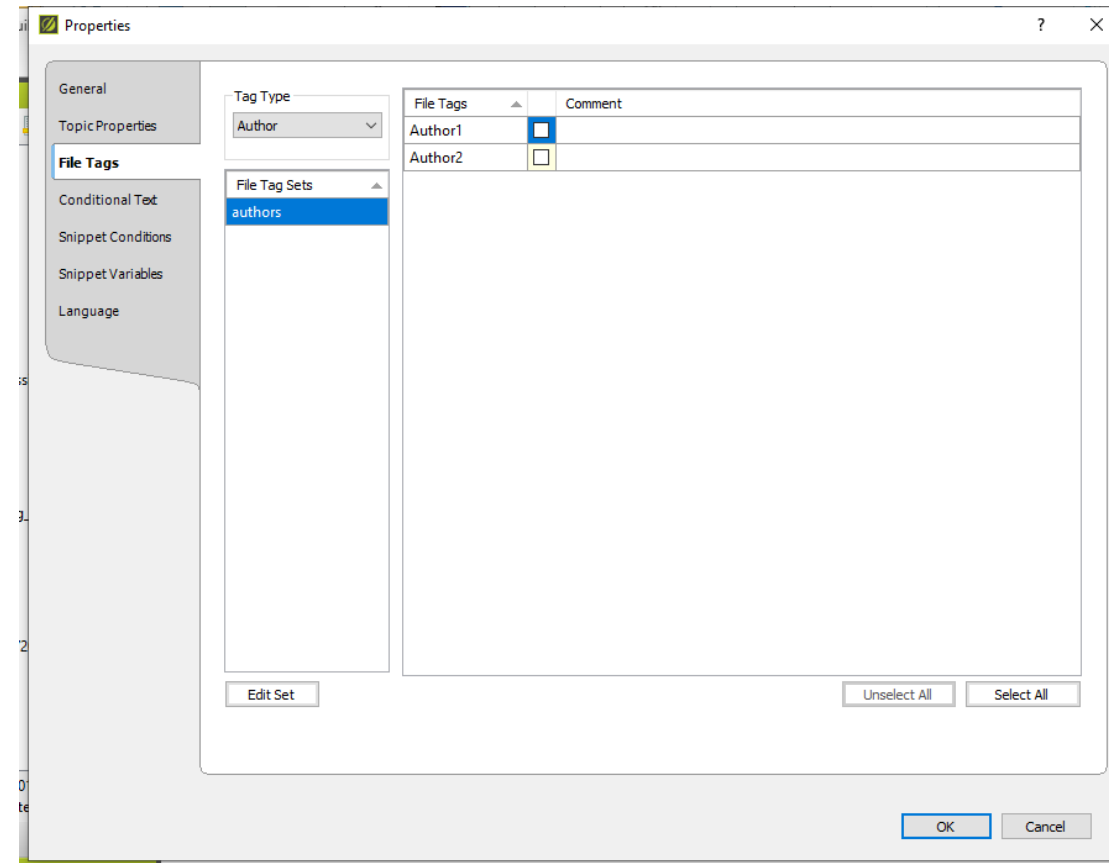
FLARE

- File tags – Creating.
 - File > New > File Tag Set.



FLARE

- File tags – Applying.
 - Properties dialog box.





FLARE

- File tags – Reporting.
 - Demo – report on a specific file tag.
 - Demo – report on file tags in general – all topics with file tags, for example.



FLARE

- Analysis feature.
 - The new version of the Analyzer package but with less-used features removed.
 - Many options in the Analysis feature are similar to those in the Reports feature.

FLARE

- Analysis feature.
 - For example, here's the Broken Links report from the Report feature.

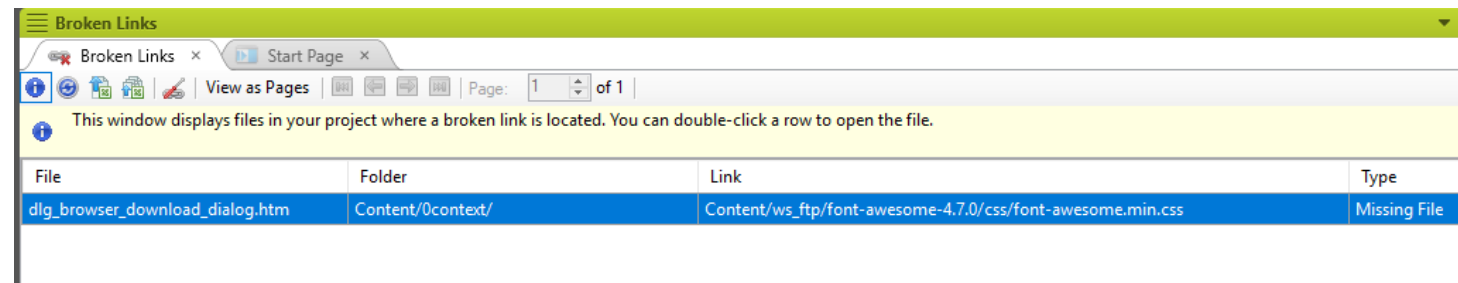
Project: C:\Operations\Flare Training\ws_ftp\ws_ftp.flprj
Generated: 2/27/2019 3:09:45 AM
By: Neil Perlin

Broken Links

Count: 1
File: Content/0context/dlg_browser_download_dialog.htm
Link: Content/ws_ftp/font-awesome-4.7.0/css/font-awesome.min.css
Link Type: link

FLARE

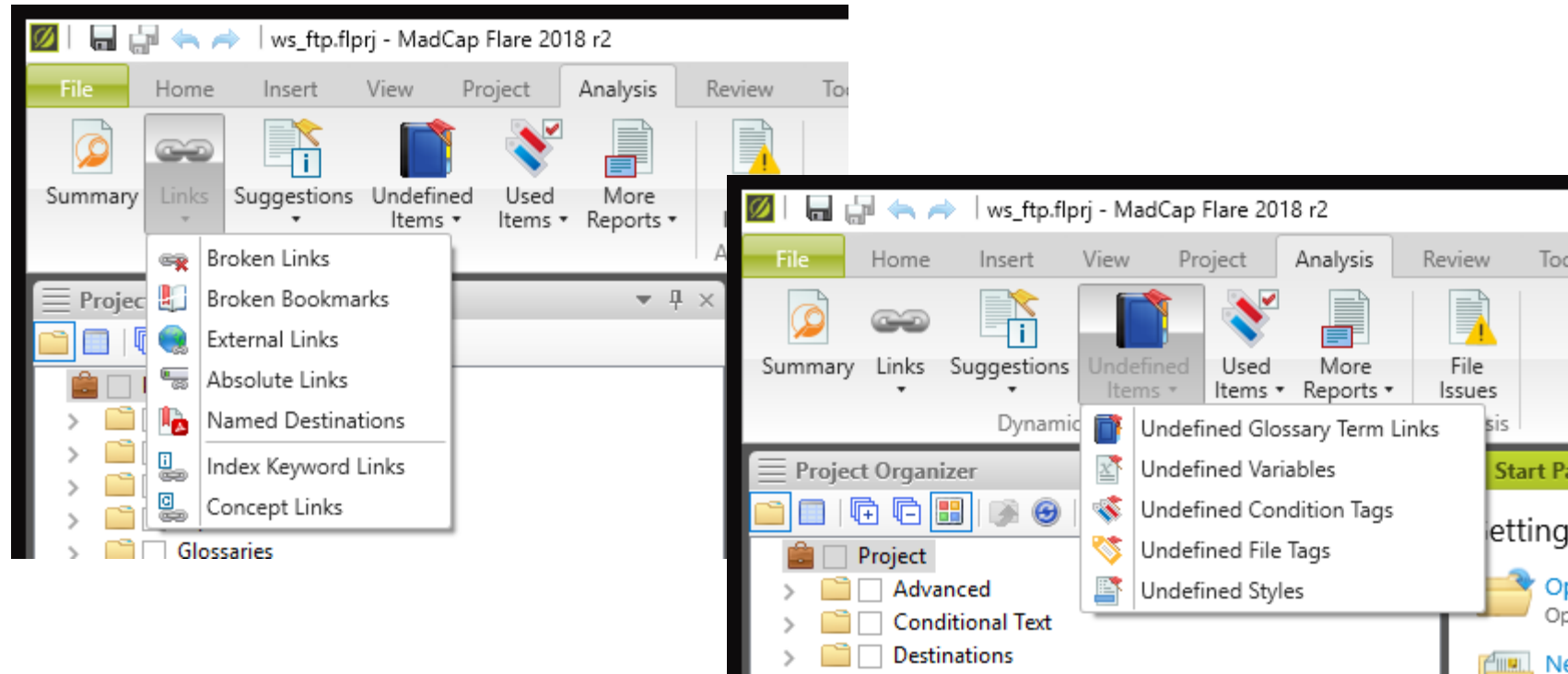
- Analysis feature.
 - And here's the Broken Links report from the Analysis feature.



- Clicking it opens the topic with the broken link.
- So the Analysis feature actively helps you fix the error, unlike the static Report feature.

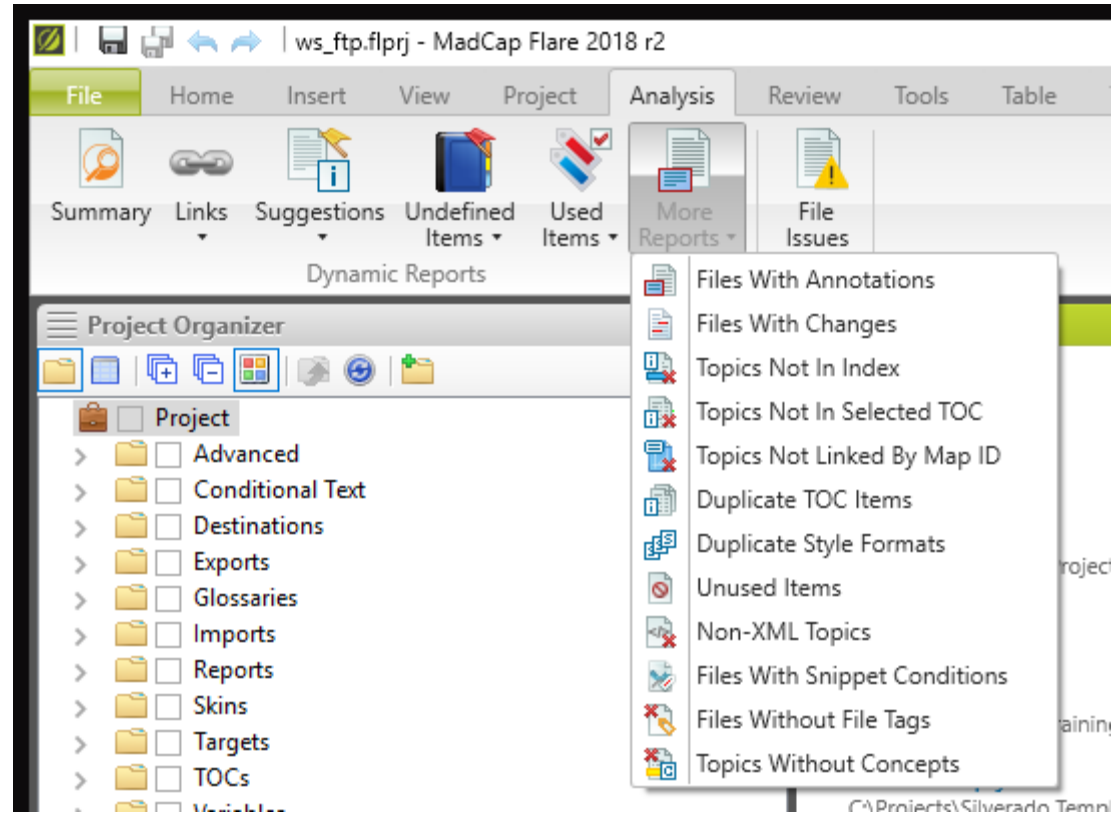
FLARE

- Analysis feature.
 - More reports.



FLARE

- Analysis feature.
 - Still more reports.



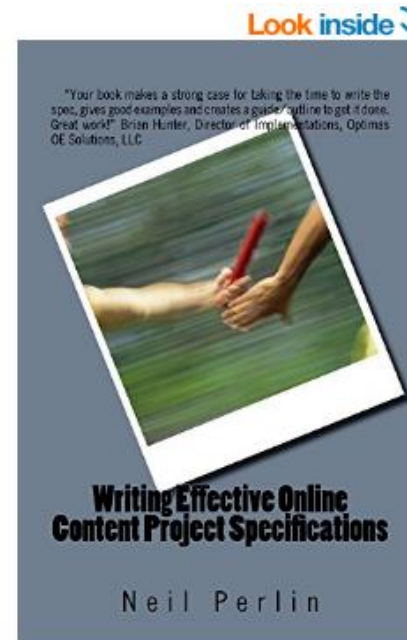


FLARE

- Analysis feature.
 - Demo.

FLARE

- Writing a project description.
 - Always document your projects for your benefit and that of your successors.
 - Otherwise, <insert horror story here...>
 - I wrote a book about it:





FLARE

- Writing a project description – some things to include.
 - Project description.
 - Configuration requirements.
 - Audience description.
 - Information types.
 - Access into the project and navigation once in it.
 - Authoring tool specs.
 - Authoring workflow.
 - And more...



FLARE

- Writing a project description – how can Flare help?
 - Write the project description in topics in the project itself.
 - Add comments within the “real” topics.
 - Create a condition called “author’s notes,” apply it to the topics and comments, and exclude them from the output.
 - Use the Report feature to create a report that lists all files that contain condition tags.

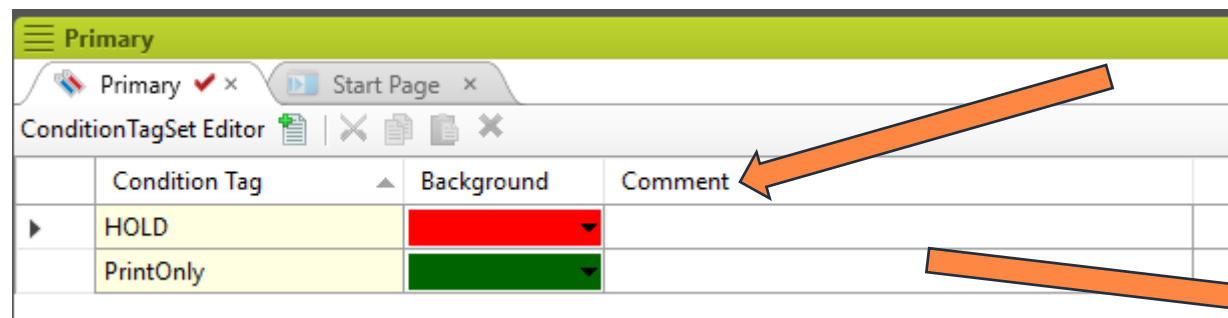




FLARE

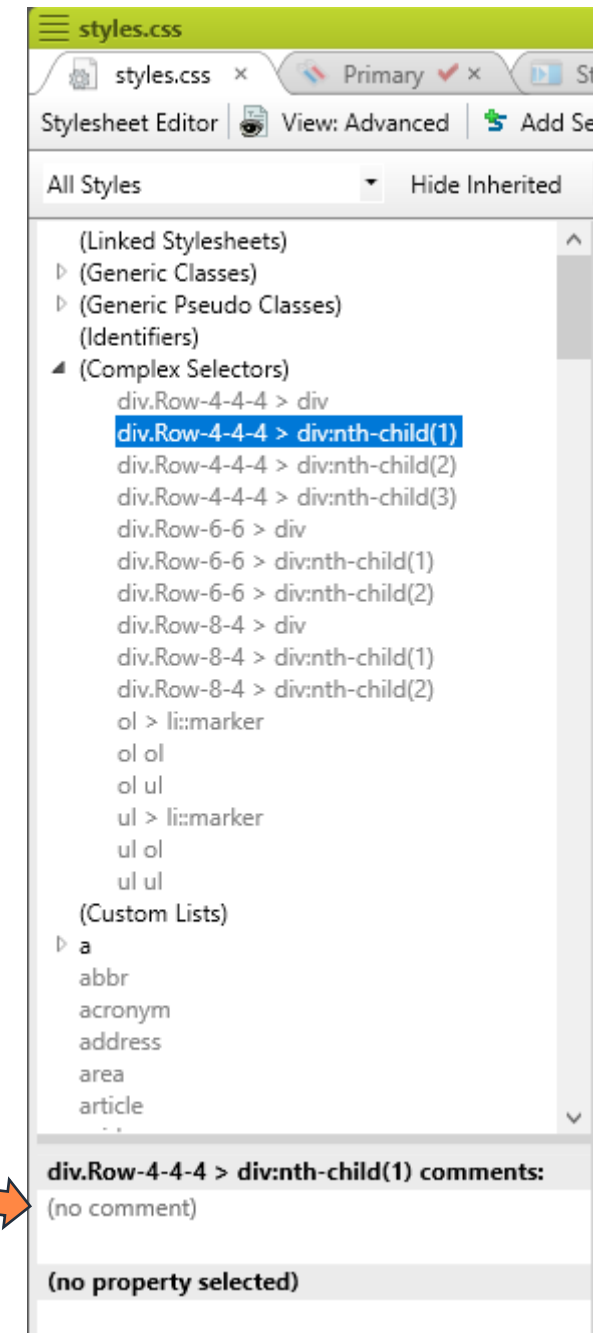
- Writing a project description – how can Flare help?
 - Make notes in topics by using the Annotations feature (Review > Insert Annotation).
 - Use the Report feature to create a report that lists all topics that contain annotations.

FLARE

- Writing a project description...
 - Use the internal commenting features to describe styles, conditions, variables, anything with a Comment field.



	Condition Tag	Background	Comment
▶	HOLD		
	PrintOnly		



styles.css

styles.css x Primary x St

Stylesheet Editor View: Advanced Add Se

All Styles Hide Inherited

(Linked Stylesheets)

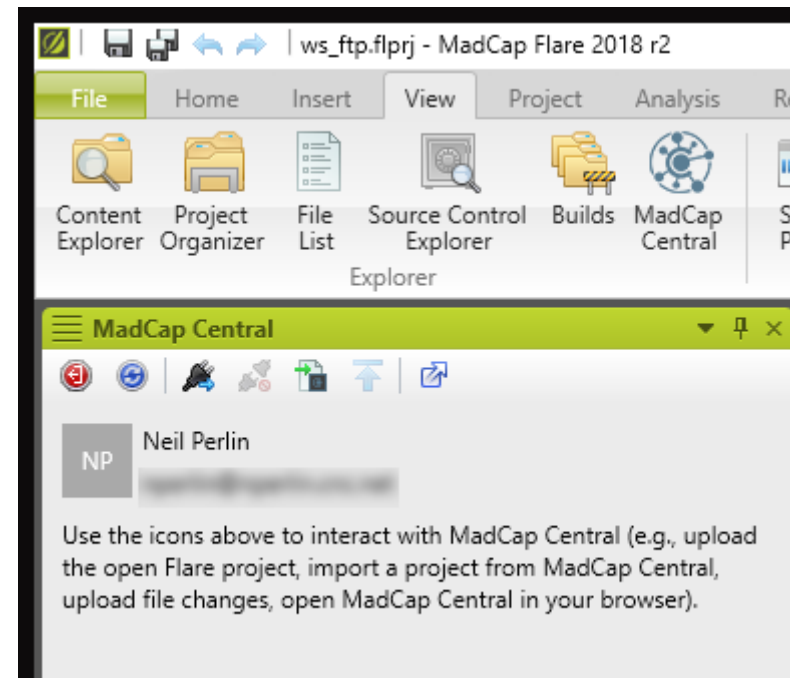
- ▶ (Generic Classes)
- ▶ (Generic Pseudo Classes)
- (Identifiers)
- ▲ (Complex Selectors)
 - div.Row-4-4-4 > div
 - div.Row-4-4-4 > div:nth-child(1)**
 - div.Row-4-4-4 > div:nth-child(2)
 - div.Row-4-4-4 > div:nth-child(3)
 - div.Row-6-6 > div
 - div.Row-6-6 > div:nth-child(1)
 - div.Row-6-6 > div:nth-child(2)
 - div.Row-8-4 > div
 - div.Row-8-4 > div:nth-child(1)
 - div.Row-8-4 > div:nth-child(2)
 - ol > li::marker
 - ol ol
 - ol ul
 - ul > li::marker
 - ul ol
 - ul ul
- (Custom Lists)
 - ▶ a
 - abbr
 - acronym
 - address
 - area
 - article
 - ...

div.Row-4-4-4 > div:nth-child(1) comments:
(no comment)

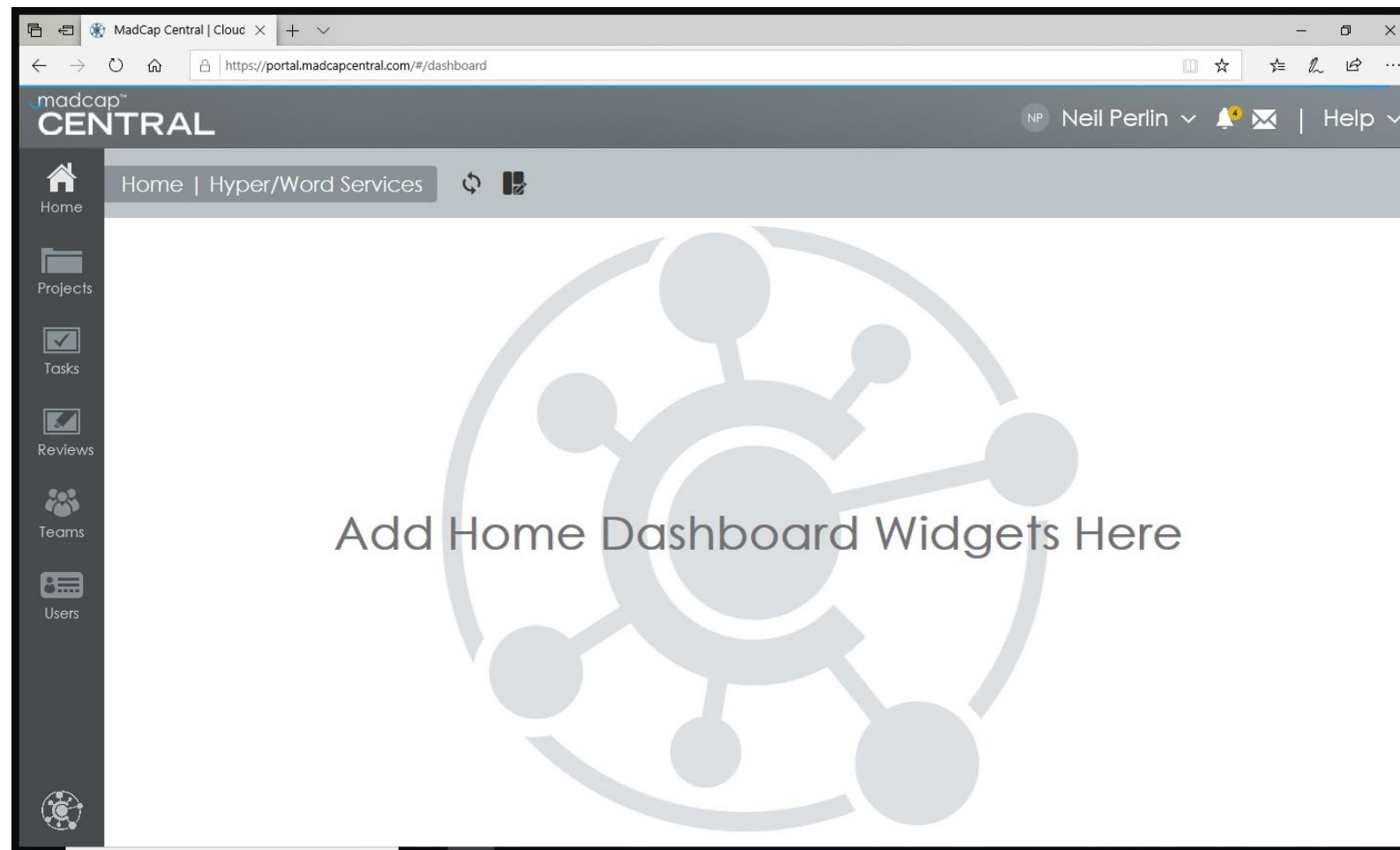
(no property selected)

CENTRAL

- A version control system that also has project management features.
- Hosted by MadCap, good if you need version control but can't run it yourself and don't have IT support.
- Accessible via Flare or your browser.

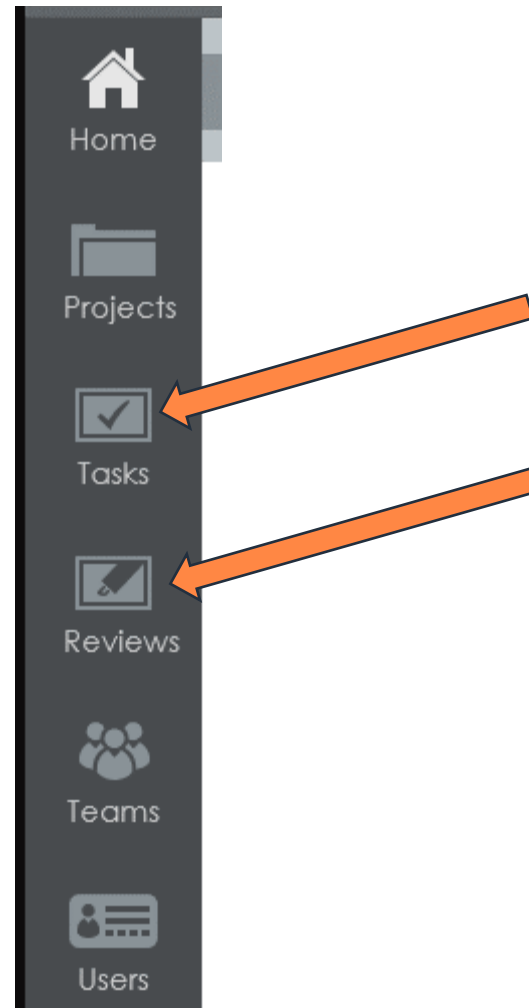


CENTRAL PORTAL



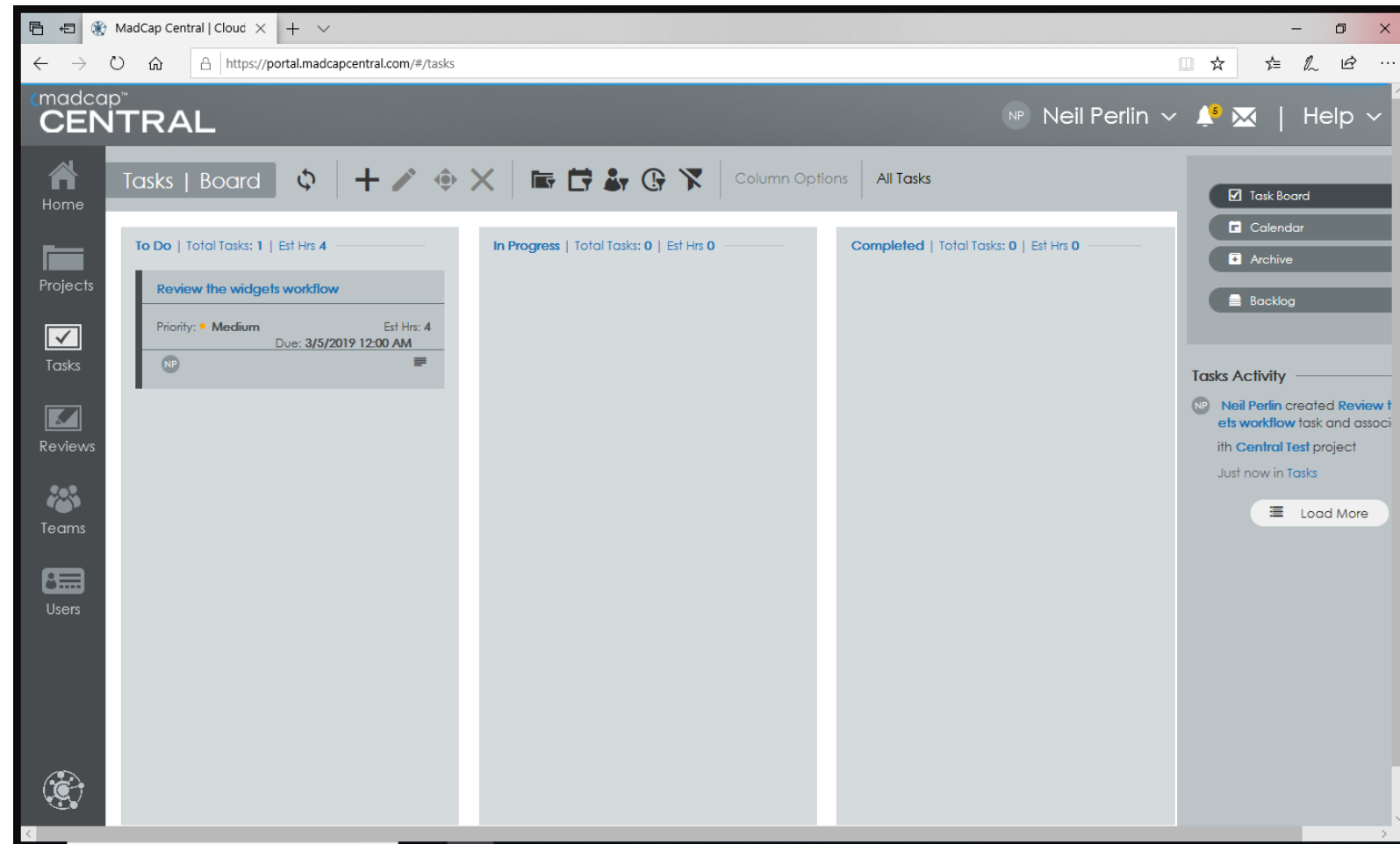
CENTRAL PORTAL

- Relevant items here...



CENTRAL PORTAL – TASKS

- Task Board



CENTRAL PORTAL – TASKS

- Creating a task.

Create Task

Title *

Review the widgets workflow

Priority Level

Description

Check with Engineering re whether to deflate the widget before or after degaussing the thingie.

Project

Central Test

Start Date

2/28/2019 12:00 AM

Due Date

3/5/2019 12:00 AM

Est Hours

4

Assigned to:

NP

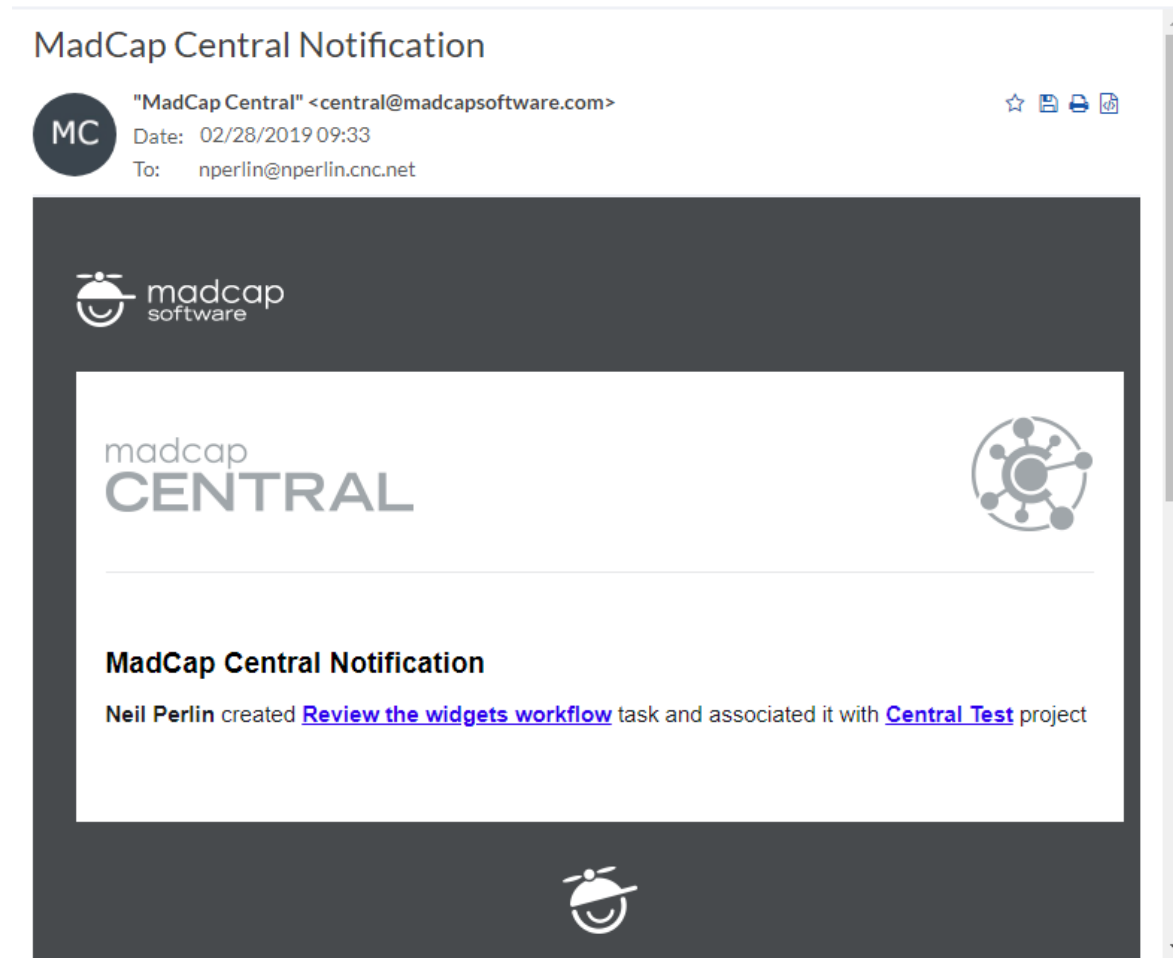
Attachments

Create Task

Cancel

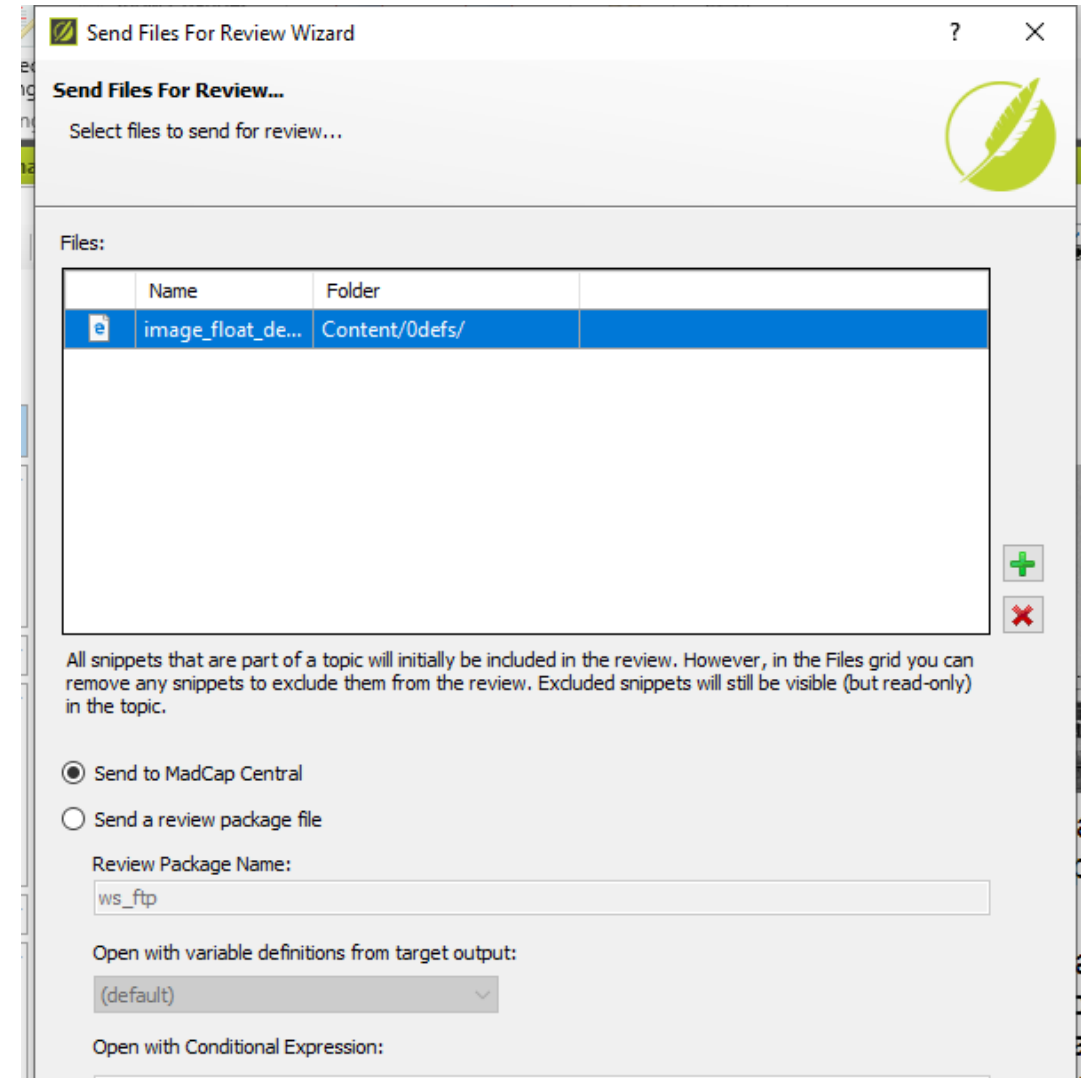
CENTRAL PORTAL – TASKS

- Keeping track of tasks – optional email notification.



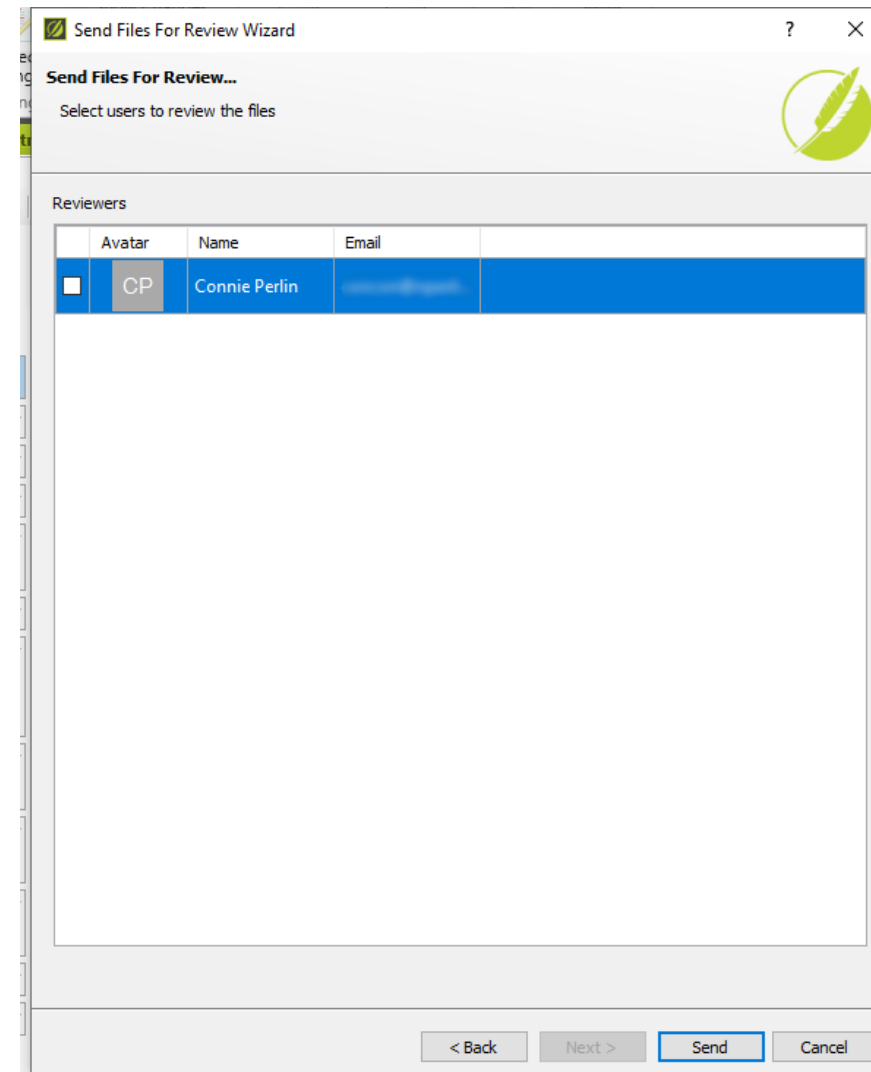
CENTRAL PORTAL – REVIEWS

- Easy to use from Flare – Review > Send for Review in Packages group on ribbon.
- Displays this screen.
- Select the Central option.



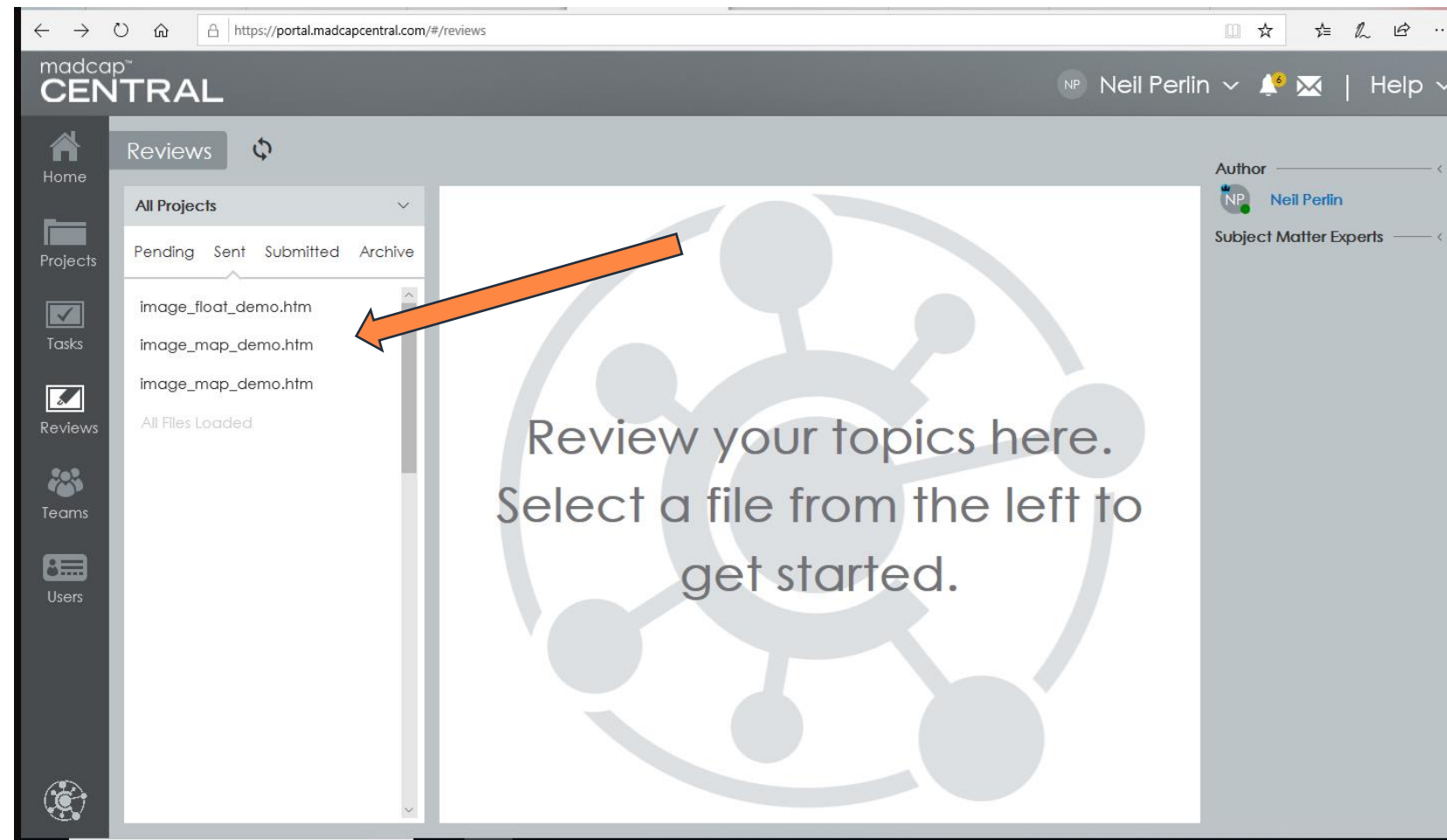
CENTRAL PORTAL – REVIEWS

- Then select the SMEs.
 - I have Admin rights so I'm included automatically.
- Click Send.
- SMEs get notified by an email with a link.
- Clicking the link takes SME here...



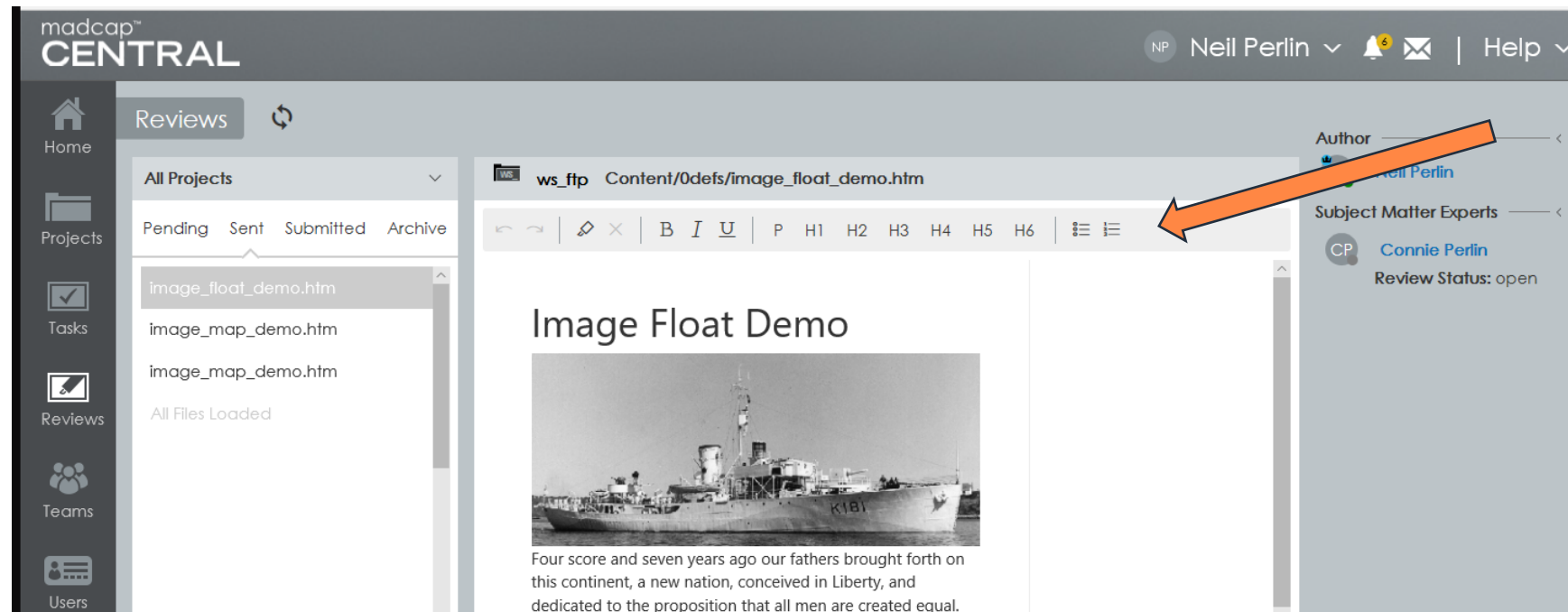
CENTRAL PORTAL – REVIEWS

- Here's the list of sent review packages.



CENTRAL PORTAL – REVIEWS

- Select the desired package to open it.
- Notice the very limited editing interface.





CENTRAL PORTAL – REVIEWS

- Make your changes and click a Submit button to return the file.
- Flare author gets an email notification.
- Opens the returned file in Flare.
- Accepts or rejects the changes.
- Accepts the finished topic file back into Flare, overwriting the previous version.



CENTRAL

- Advantages:
 - Convenience – Offers version control without needing internal resources.
 - Project management – Offers project and review management features as a bonus.
 - Easy to learn – For authors and reviewers/SMEs.
 - A “platform” (IMO) – For future feature additions.
- Drawback:
 - External hosting – Some companies don’t like this.

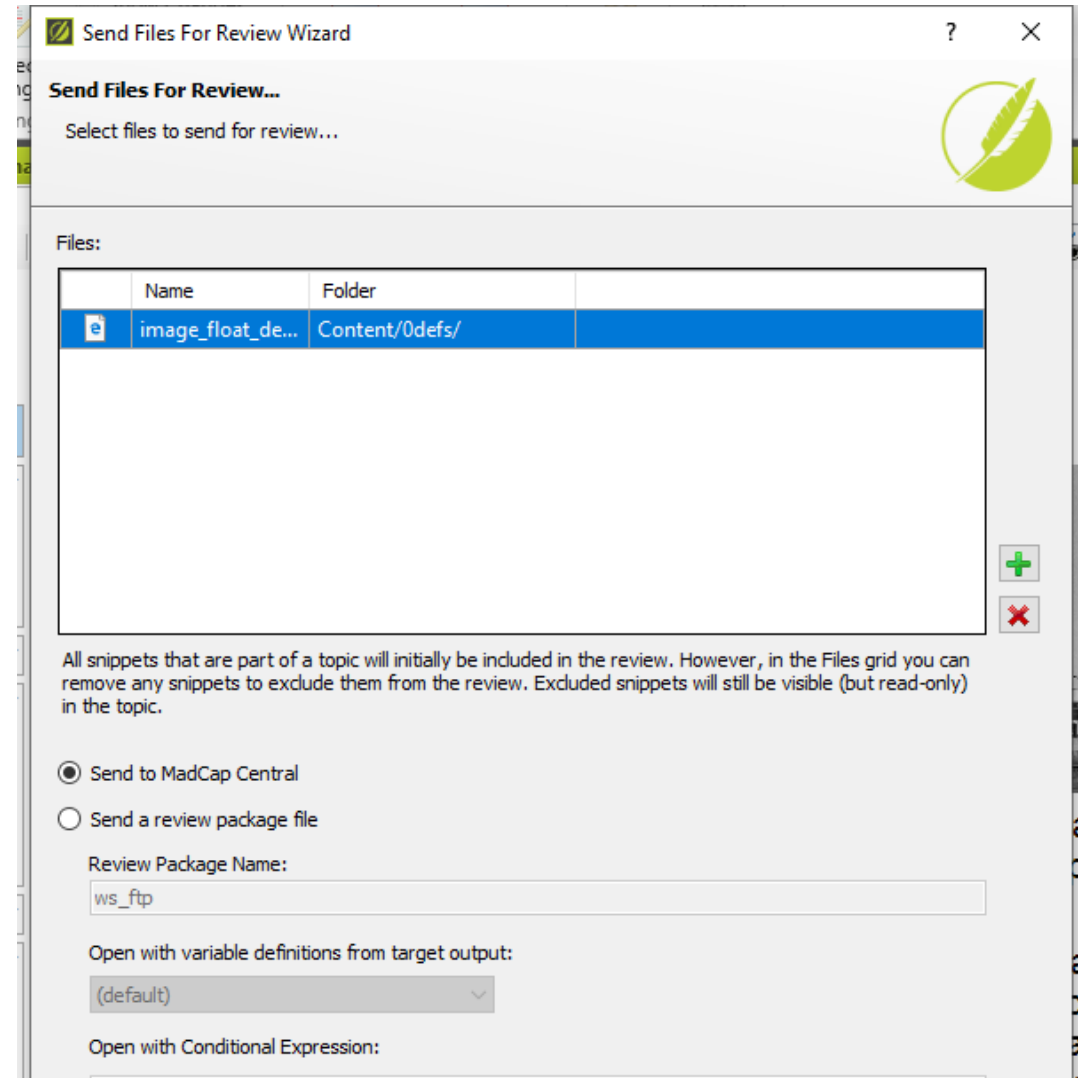


CONTRIBUTOR

- Can't use Central – there's Contributor.
- Available in two modes.
 - Free review version – lets SMEs review and annotate topics from authors and return them for incorporation into the Flare project.
 - Full version – lets authors create templates, send them to SMEs for use creating “clean” material for incorporation into the project.

CONTRIBUTOR – FREE VERSION

- Easy to use from Flare – Review > Send for Review in Packages group on ribbon.
- Displays this screen.
- Select how to send the package.





CONTRIBUTOR – FREE VERSION

- In the end, you've created an email for the SME with a link to open the topics and download the review version of Contributor if necessary.
- Or directly to Central with no need to download anything.
- SME changes and annotates the topic in a light version of Flare, then returns the result to the Flare author.



CONTRIBUTOR – FULL VERSION

- Full version includes the review mode but also lets you create contribution templates.
 - Create the template-to-be as a topic in Flare, with prompts – e.g. [type the description here...].
 - Use Review > Lock to lock elements that you don't want modified.
 - Select Save > Save as Contribution Template.
 - Send that template to the SMEs.
 - The SMEs fill out the template using a light version of Flare, and return the result to the author.



CONTRIBUTOR

- Advantages:
 - Legibility – No need to read SMEs' handwriting.
 - Technical cleanliness – No more importing Word files full of local formatting.
 - Authorability control – Can lock parts of the template to control what the SME can author.
 - Flare compliance – Files slip easily into the project without an import.
 - Easy to learn – Can be taught to SMEs in 45 minutes, 5 page cheat sheet.



CONTRIBUTOR

- Drawbacks:
 - Change management – SMEs may not want to learn a new application that mainly benefits you.



SUMMARY

- Many deliberate and serendipitous management features.
- Always interested to hear about new ones that I haven't mentioned here.



HYPER/WORD SERVICES OFFERS...

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 - Assessing readiness for “mobile”
 - Guidance toward Information 4.0
 - Flare
 - ViziApps
 - Single sourcing • Structured authoring

Thank you... Questions?



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