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.

FLARE

- Report generator.
  - Demo

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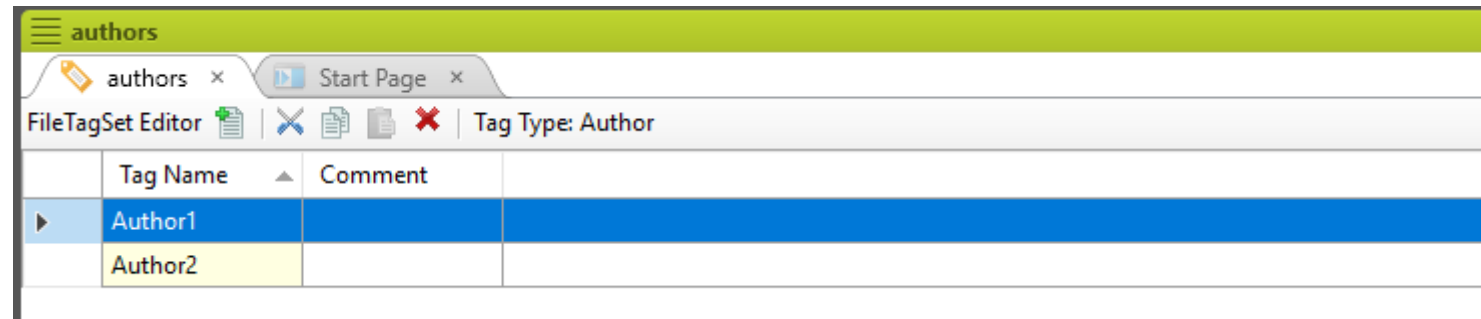
- File tags.
  - 128 predefined reports is good but what if the one you need isn't there?
  - Create your own using file tags.
  - Your own keywords that you can create, assign to any element in a project – topics, snippets, etc.
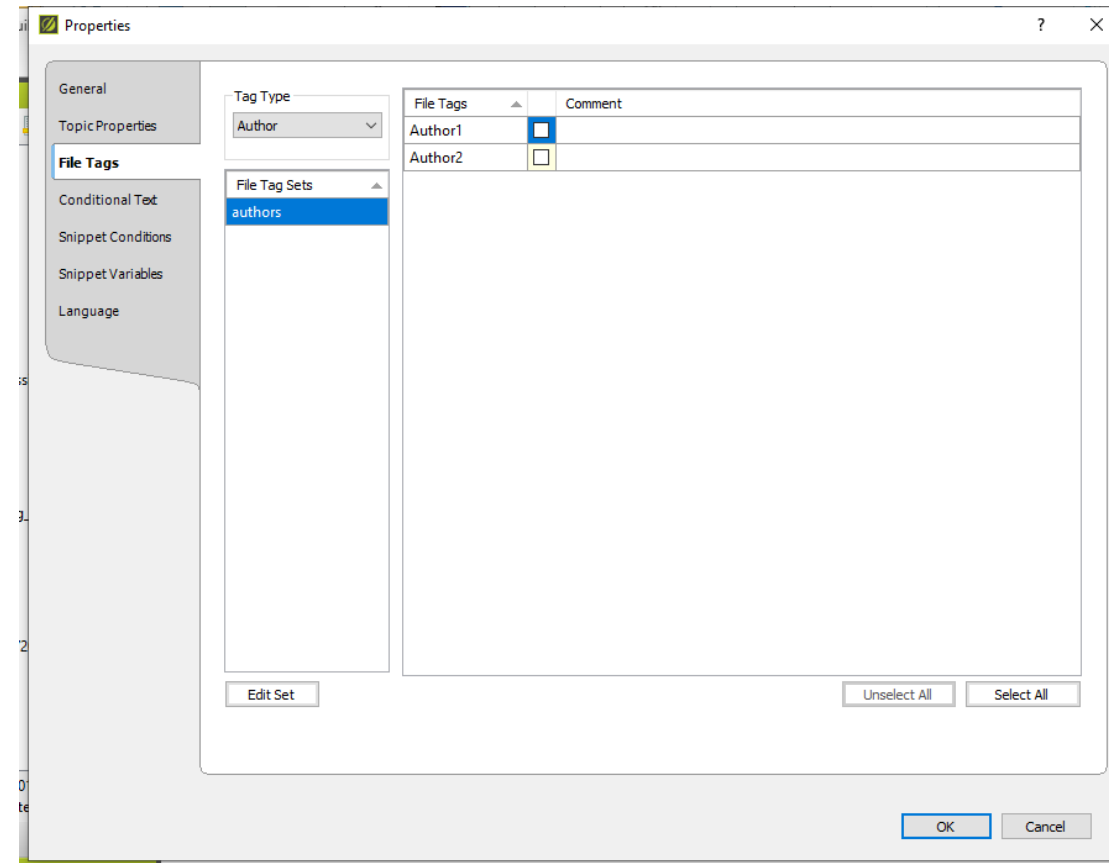 - Can then search for and report on.

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
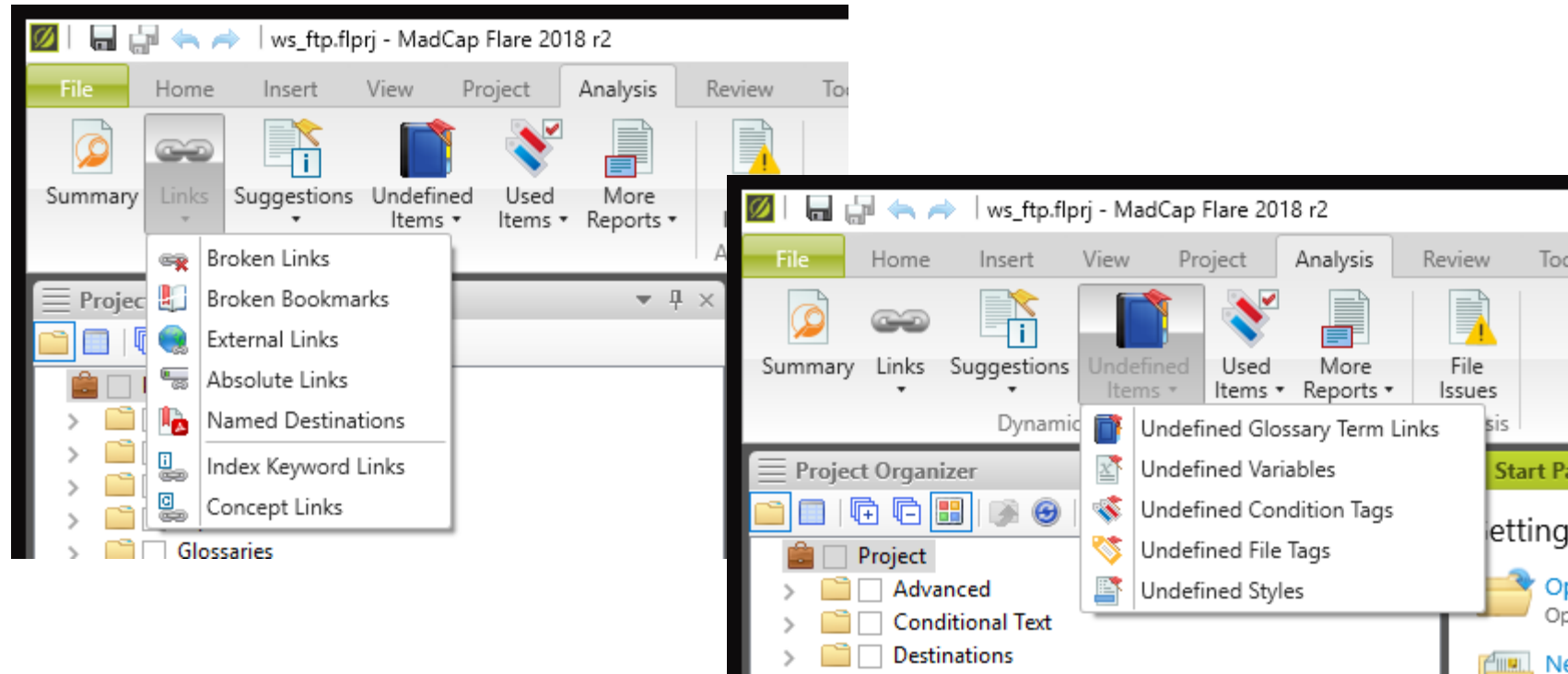   Link Type: link

FLARE

- Analysis feature.
  - And here's the Broken Links report from the Analysis feature.
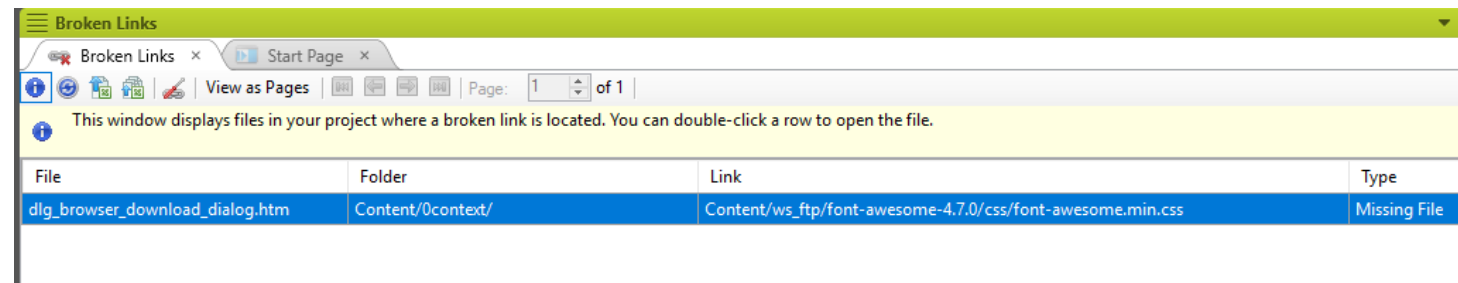
  - Clicking it opens the topic with the broken link.
  - So the Analysis feature actively helps you fix the error, unlike the static Report feature.
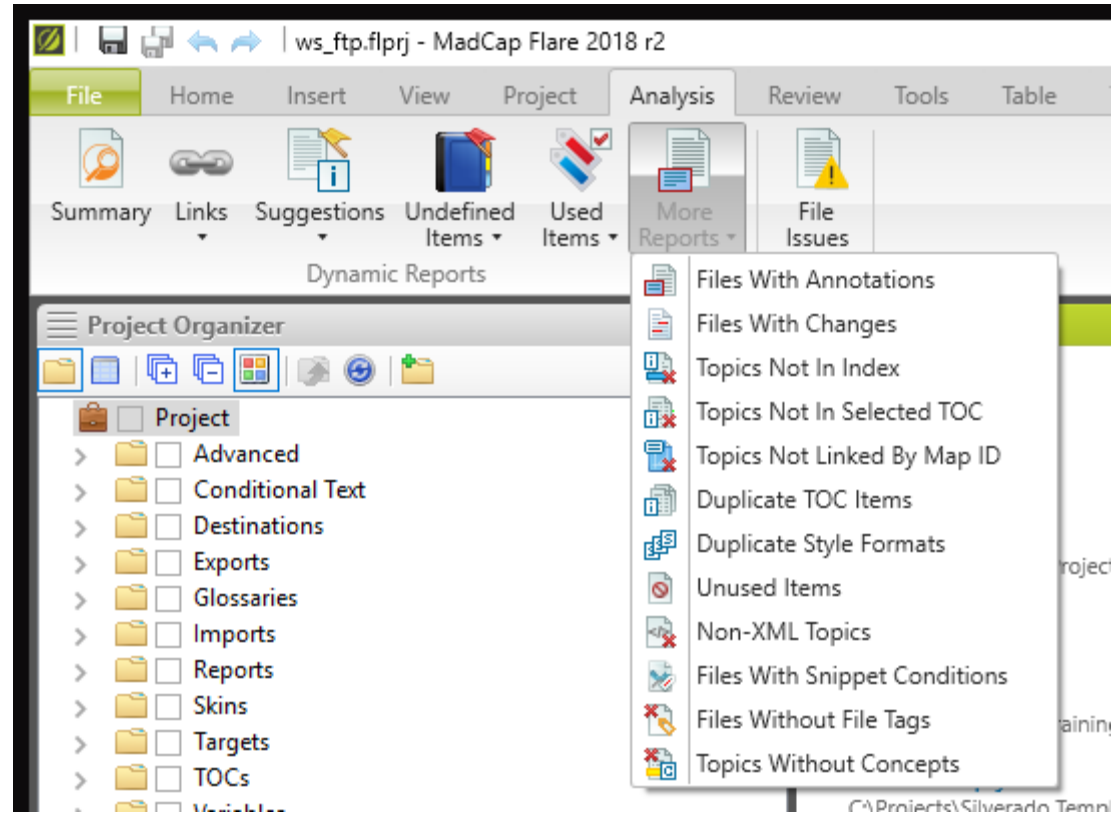
FLARE

- ## Analysis feature.
  - ### More reports.

FLARE

- Analysis feature.
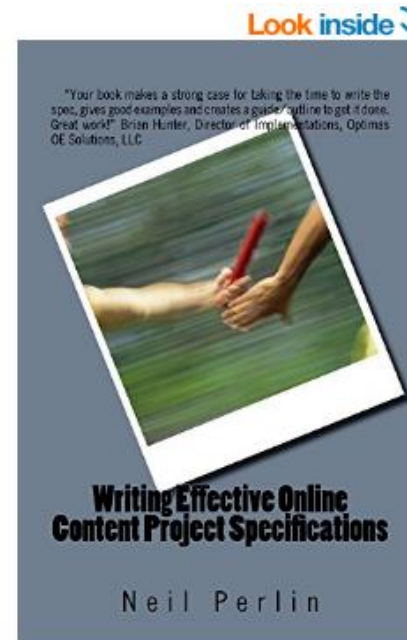 - Still more reports.

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.
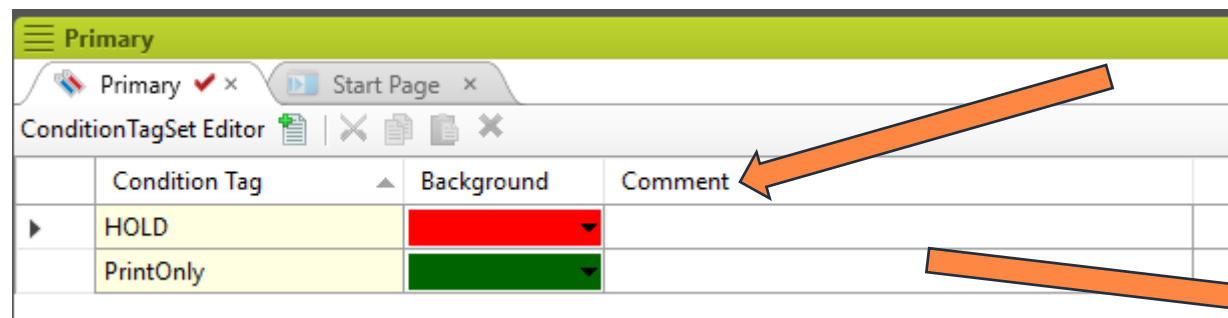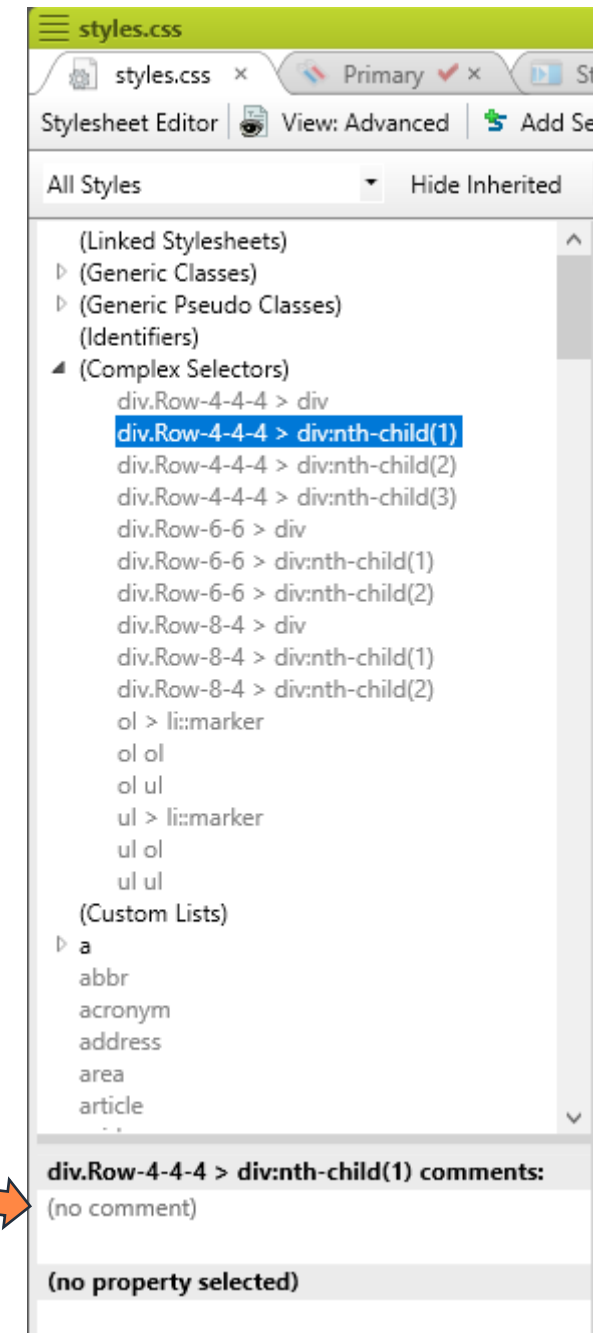
FLARE

- 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.

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.
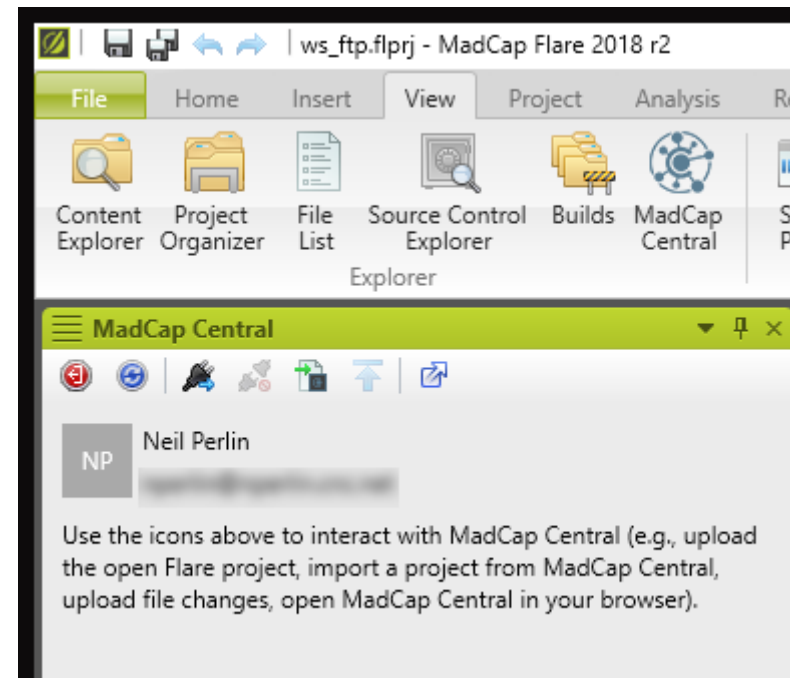
CENTRAL PORTAL
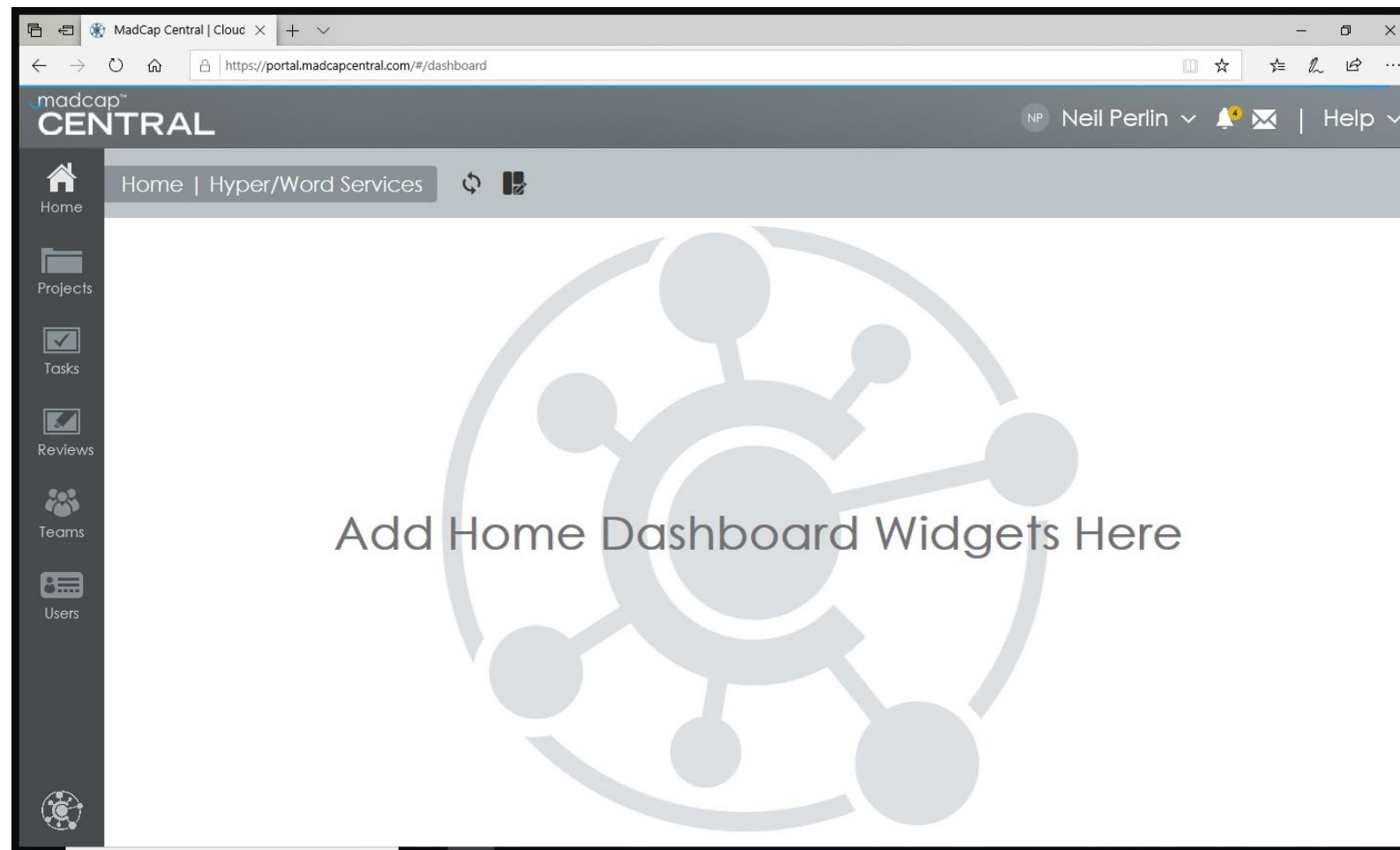
CENTRAL PORTAL

- Relevant items here…
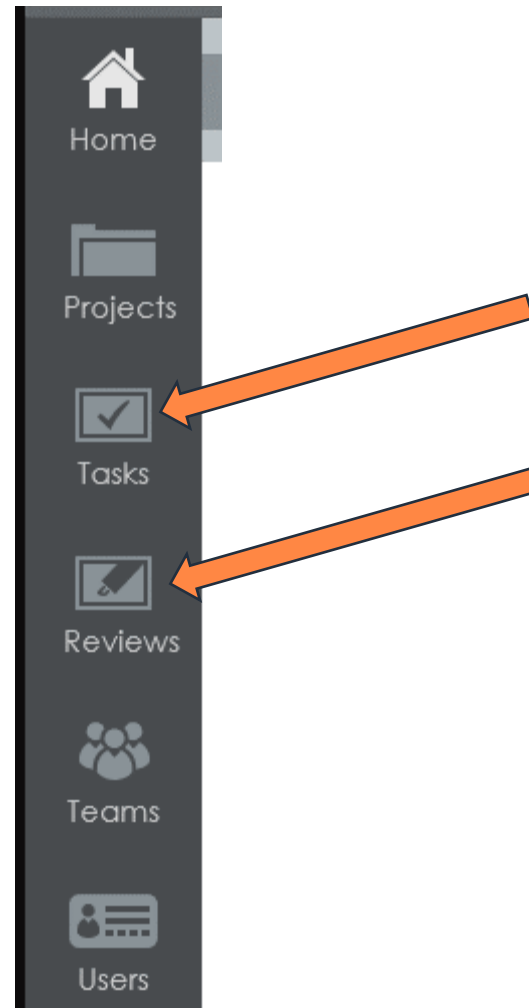
CENTRAL PORTAL – TASKS

- Task Board
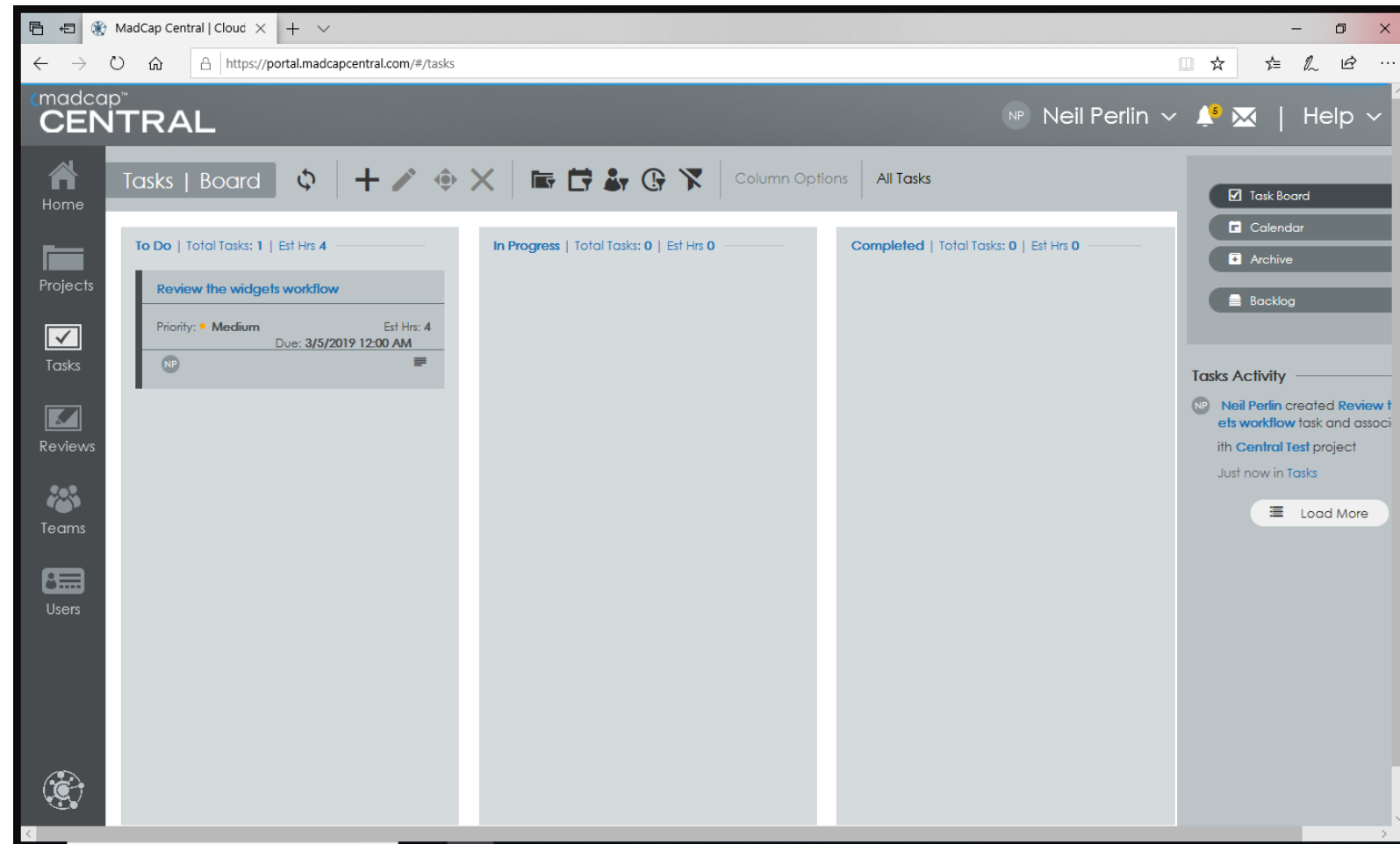
CENTRAL PORTAL – TASKS

- Creating a task.

CENTRAL PORTAL – TASKS

- Keeping track of tasks – optional email notification.
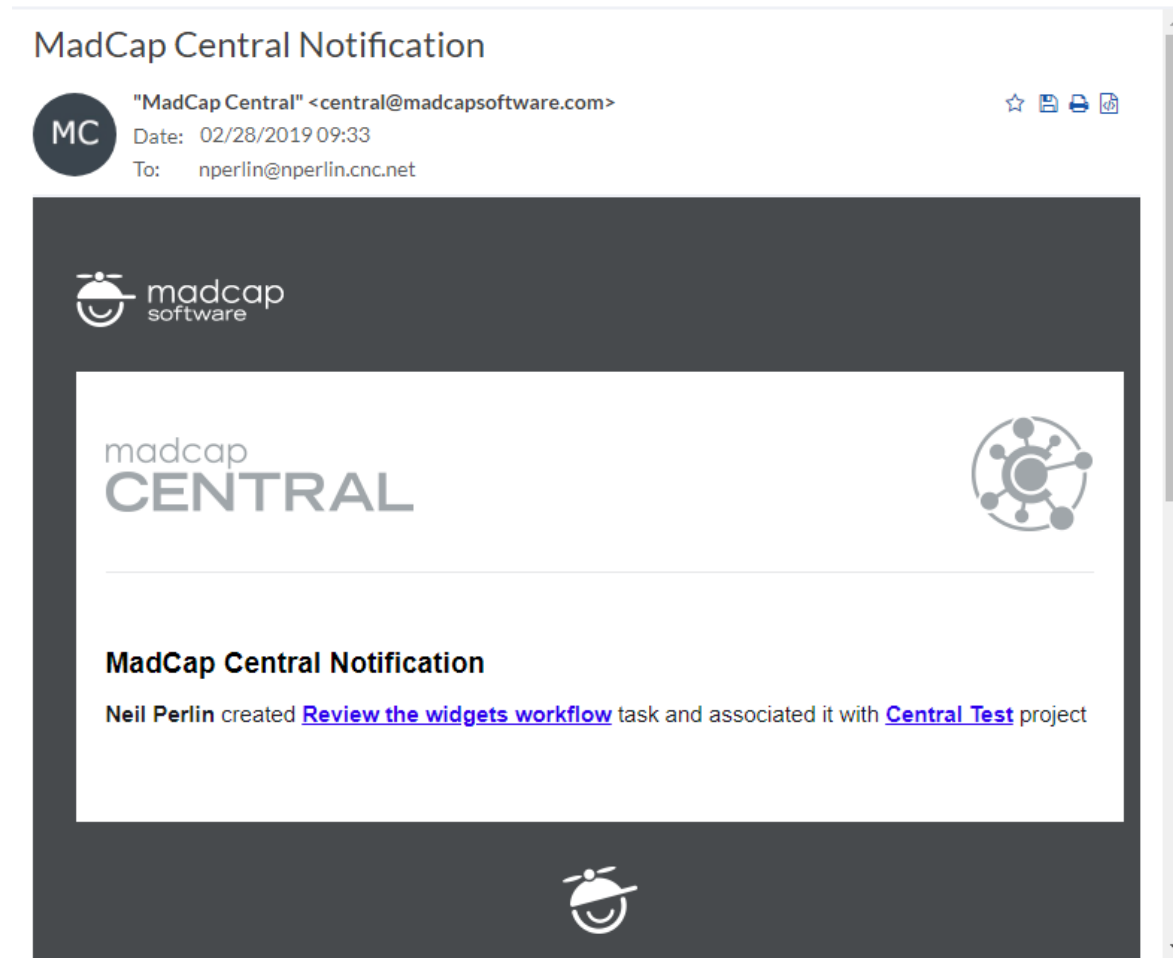
CENTRAL PORTAL – REVIEWS

- Easy to use from Flare – Review > Send for Review in Packages group on ribbon.

- Displays this screen.

- Select the Central option.
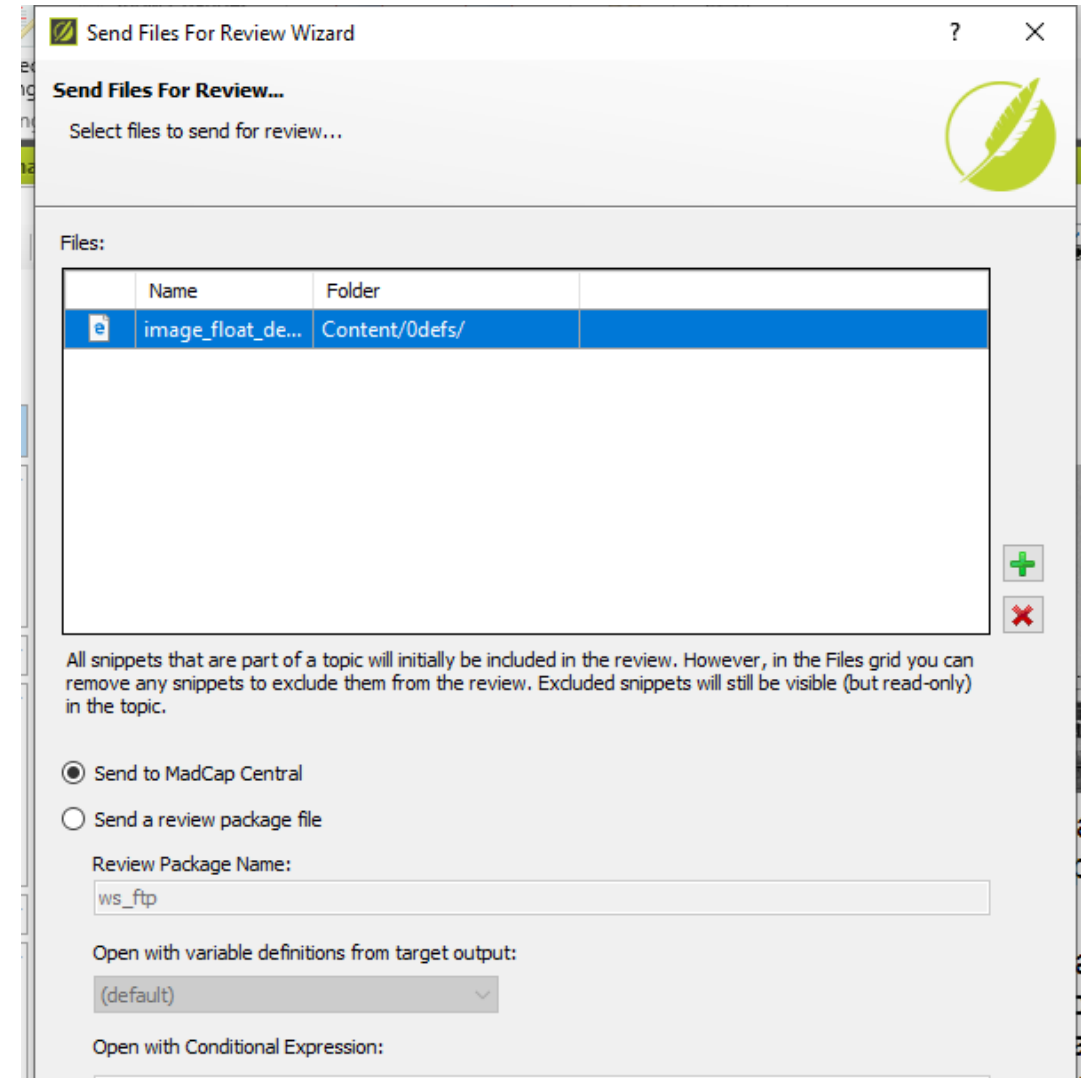
CENTRAL PORTAL – REVIEWS

- 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…
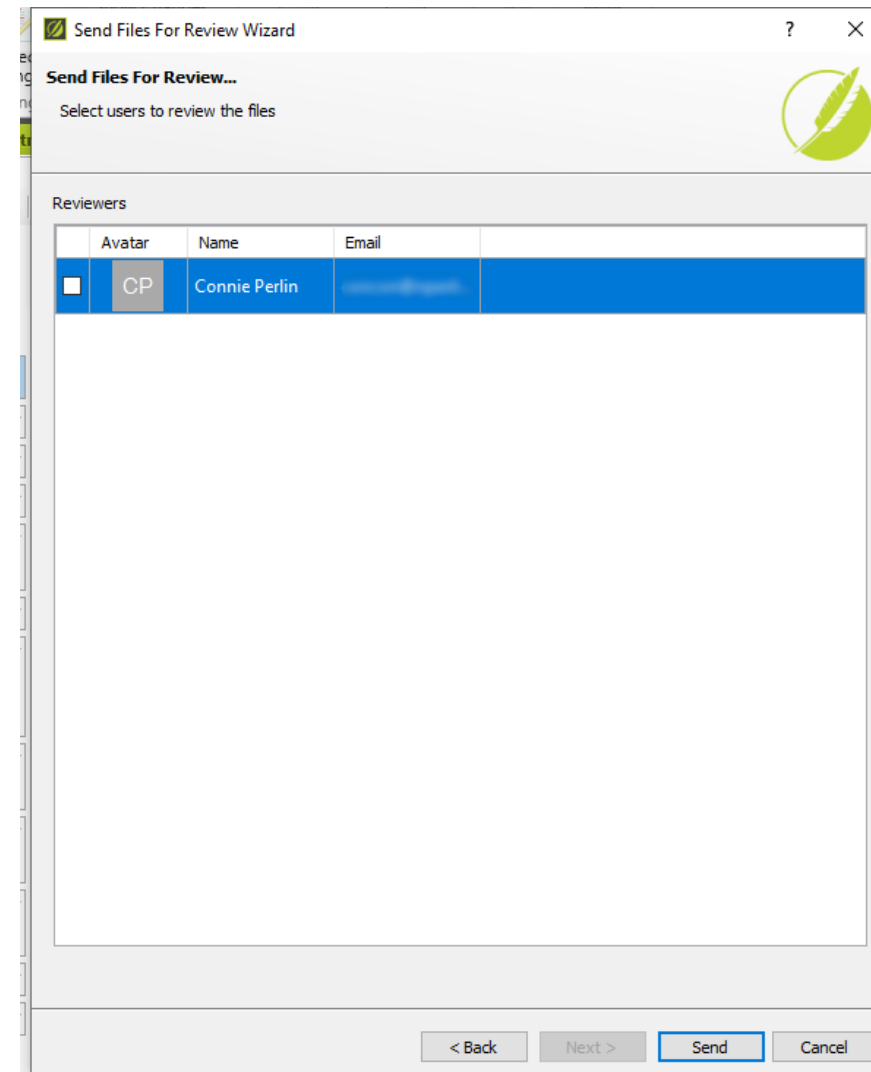
CENTRAL PORTAL – REVIEWS

- Here's the list of sent review packages.
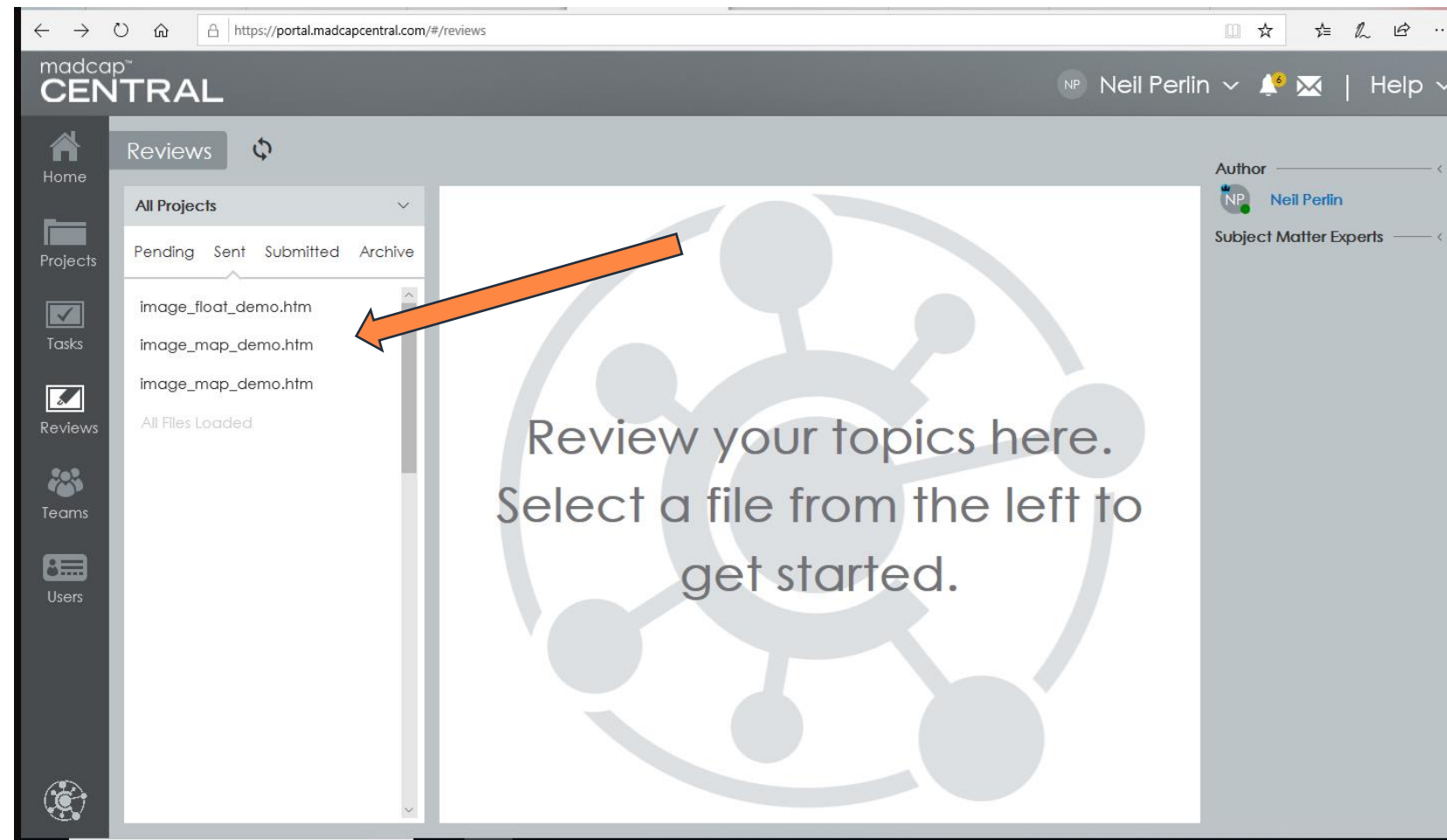
CENTRAL PORTAL – REVIEWS

- Select the desired package to open it.

- Notice the very limited editing interface.
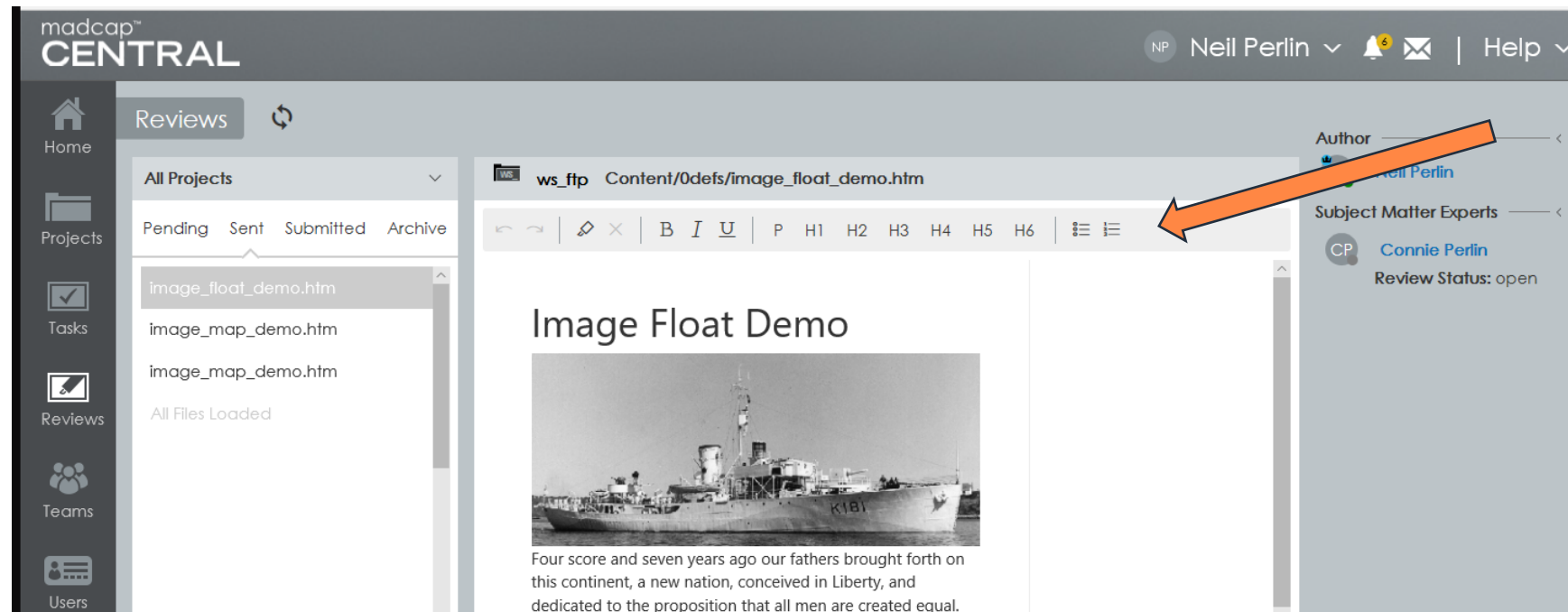
CENTRAL PORTAL – REVIEWS

- 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.
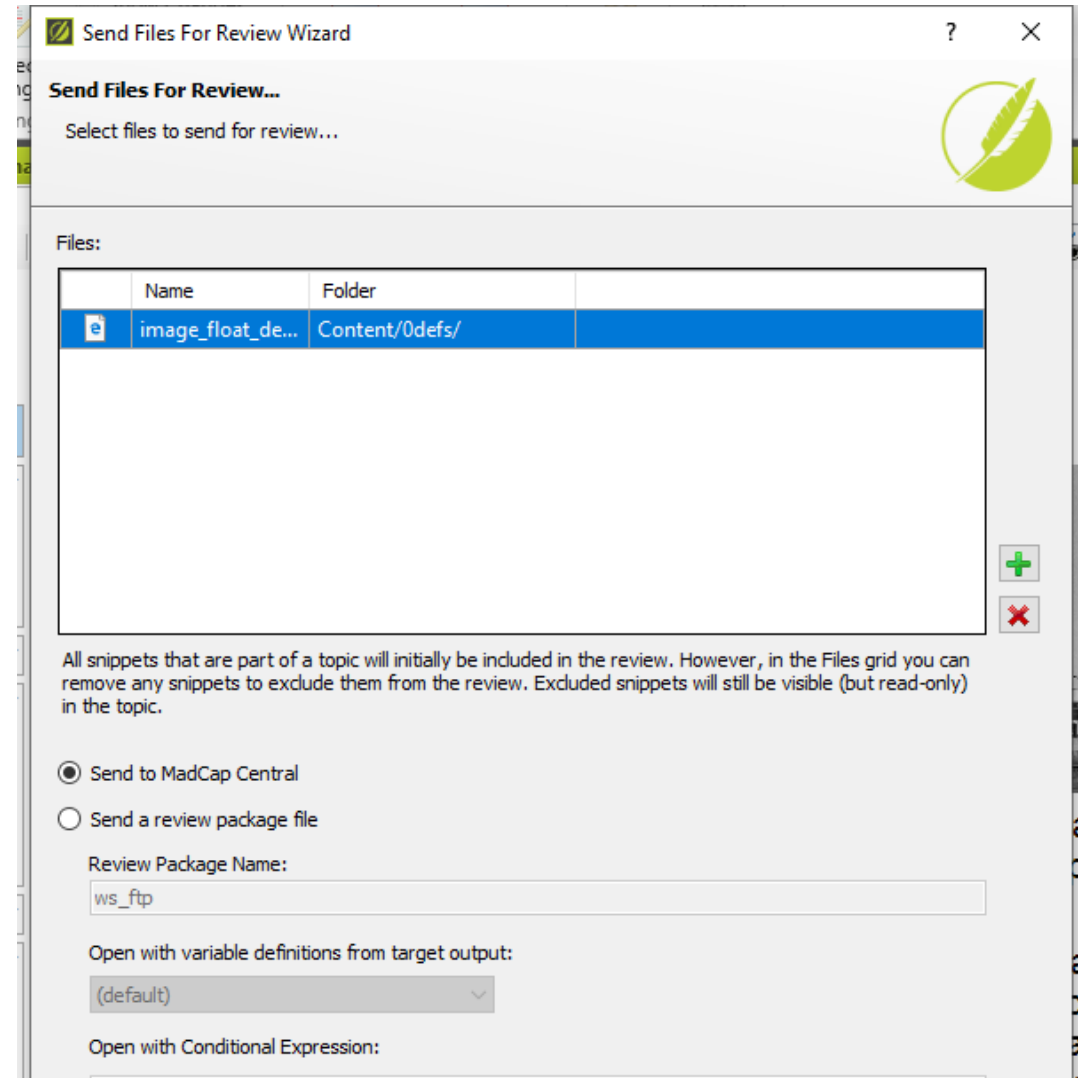
CONTRIBUTOR – FREE VERSION

- 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…

- Training • Consulting • Development
    - Assessing readiness for "mobile"
    - Guidance toward Information 4.0
    - Flare
    - ViziApps
    - Single sourcing • Structured authoring

Thank you... Questions?

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