



LIVE WEBINAR



# Replacing a Learning Management System (LMS) with MadCap Flare: A Case Study with TEAM Software



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## **PRESENTED BY:**

Chris Jones, Product Content Manager | TEAM Software



## BEFORE WE GET STARTED...



The webinar will be recorded  
and emailed to all registrants



Use the Question Panel in  
GoToWebinar to ask questions  
throughout the webinar



# Replacing a Learning Management System (LMS) with MadCap Flare

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Chris Jones – Learning Content Manager, TEAM Software

# About Me

**Using Flare since version 9 around 2013-2014**

**Manage a team of two tech writers and two instructional designers**

**Passionate about providing exceptional learning experiences**

**Love endurance running**



# Overview

- 1 LMS, CMS and Flare, Oh My!
- 2 The TEAM Software problem
- 3 How we solved it
- 4 Let's get technical
- 5 Questions

# LMS, CMS, and Flare

# What's all this stuff anyway?

- LMS – Historically useful for hosting (primarily internal) SCORM compliant packages
- CMS – Historically useful for managing website content (think Wordpress)
- Flare – Historically useful as a Help Authoring Tool (HAT)

They used to call us propeller heads

**LMS**



**Learning Management  
System**

**CMS**



**Content Management  
System**

# The TEAM Software problem



# Some helpful context

Implementation



Responsible for leading software implementations (6 months)

Instructional Design



Responsible for creation of eLearning

Tech Comm



Responsible for creating “the helps” and release notes

# What exactly is the problem?

- The tech writing team and instructional design team were not on the same TEAM team
- Our LMS was clunky and cost prohibitive
- Engagement was very low
- Extreme duplication of efforts across teams

# Less money mo' problems

- Very small (\$0) budget
- Very small ( $-\infty$ ) time

# How we solved it

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# Org Changes




# Develop a mission statement



We create multimedia learning resources to help our clients be more independent using TEAM products.

- Examine our technical, training, API, etc. content through the lens of a learning experience (rather than a function of support)
- Deliver solutions that focus on the learning experience


# Course Catalog

 TEAM Software | [Learning Center](#)

[Request Training](#)

Contact Support  
800.500.4499  
[supportstaff@teamsoftware.com](mailto:supportstaff@teamsoftware.com)

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Search All 

## TEAM Software Course Catalog

Search for courses...

What would you like to learn more about?  

All ▾

What solution are you working with?  

All ▾

How do you prefer to learn?  

All ▾



### WinTeam Overview

Average Course Length: 1 Hour

Type: With a trainer



### Master Files

Average Course Length: 2 Hours

Type: With a trainer



### User Security

Average Course Length: 1 Hour

Type: With a trainer



### Payroll

Average Course Length: 4-6 Hours

Type: With a trainer



### Accounts Payable

Average Course Length: 2 Hours

Type: With a trainer



### Accounts Receivable (Recurring Invoices)

Average Course Length: 2-3 Hours

Type: With a trainer



### Accounts Receivable (via Personnel Scheduling)

Average Course Length: 2-3 Hours

Type: With a trainer



### Accounts Receivable (Collections)

Average Course Length: 1 Hour

Type: With a trainer

# Course Catalog

The screenshot displays the TEAM Software Course Catalog interface. A modal window titled "Master Files" is open, showing course details. The modal includes a search bar, a list of topics, and a download button for the course guide. The background shows a sidebar with course categories and a list of courses.

**TEAM Software**

Search for courses...

What would you like to learn?

All

**WinTear**

Average Course Length: 2 Hours

Type: With a trainer

**Accounts Receivable**

Average Course Length: 2 Hours

Type: With a trainer

**Master Files**

Average Course Length: 2 Hours

Type: With a trainer

Master Files can be found in multiple modules. Master files are the source record that holds important information such as address, contacts, billing, and payroll information. In order to fully utilize the modules, you will be required to set up the proper Master Files. In this session, we go over the master file set up for each module.

In this session, you will:

1. Create Job Master File
2. Create Customer Master File
3. Create Employee Master File
4. Create Item Master File
5. Create Vendor Master File
6. Create Asset Master File

Download the course guide



# Learning Center V1



## TEAM University

Learn at your own pace

Start Learning 



## Help Articles

Troubleshoot and solve problems

Start Solving 




## Latest Features

Explore our newest updates

Start Exploring 


# Learning Center V1

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## TEAM University









### New Courses

Fiscal Period Close



### Featured Courses

Daylight Savings Time Update  
Introduction to WinTeam



### Browse All Courses


## Learning Tracks

WinTeam Intro

Compliance Tracker

Quality-Assurance


# Learning Center V1

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## WinTeam Intro Learning Track

AA01: Installing Citrix and Uniprint	AA02: Logging On to WinTeam	AA03: Module Overview	AA04: Navigating WinTeam
AA05: Filtering and Searching	AA06: Job Overview	AA07: Employee Overview	AA08: Customer Overview
AA09: Vendor Overview	AA10: Tiers	AA11: Hours Types	AA13: SaaS File Explorer

# Learning Center V1

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WinTeam Intro

- ✓ AA01: Installing Citrix and Uniprint
- ✓ AA02: Logging On to WinTeam
- ✓ AA03: Module Overview
- ✓ AA04: Navigating WinTeam
- ✓ AA05: Filtering and Searching
- ✓ AA06: Job Overview
- ✓ AA07: Employee Overview
- ✓ AA08: Customer Overview
- ✓ AA09: Vendor Overview
- ✓ AA10: Tiers
- ✓ AA11: Hours Types
- ✓ AA13: SaaS File Explorer

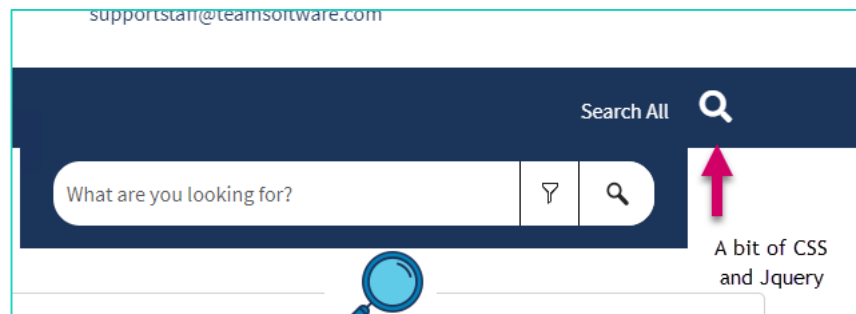
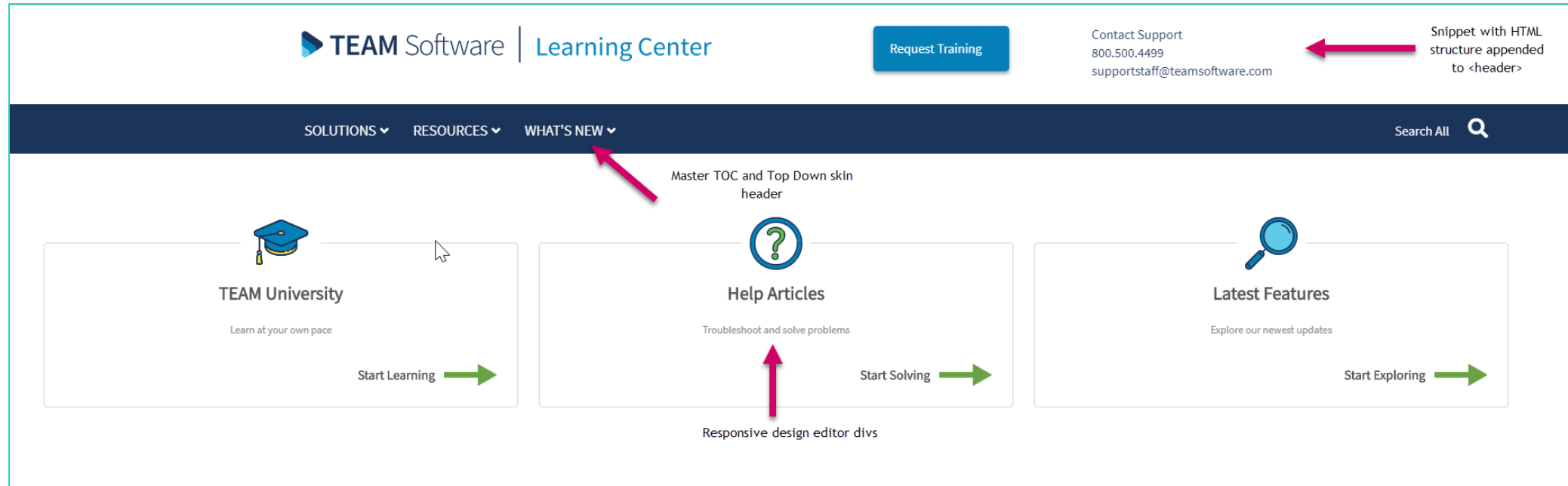
AA01: Installing Citrix and Uniprint

 **TEAM** Software | Learning Center




Wait... How'd you do that?

# Learning Center Home Page



# TEAM University Home


 TEAM Software

Learning Center

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Search All 

TEAM University



Search Team University 



New Courses

Fiscal Period Close



Featured Courses

Daylight Savings Time Update

Introduction to WinTeam



Browse All Courses

Learning Tracks

Responsive design editor divs

WinTeam Intro

Compliance Tracker

Quality-Assurance


Search Proxy with custom script that selects a filter on focus



Menu proxy (yes, a menu proxy) with some grid CSS. Could be accomplished with flex as well.




# Learning Tracks

 TEAM Software | Learning Center

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Search All 

### WinTeam Intro Learning Track


AA01: Installing Citrix and Uniprint	AA02: Logging On to WinTeam	AA03: Module Overview	AA04: Navigating WinTeam
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AA09: Vendor Overview	AA10: Tiers	AA11: Hours Types	AA13: SaaS File Explorer

Menu Proxy  
(Interim Solution)






# Course

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Search All 

WinTeam Intro

- AA01: Installing Citrix and Uniprint
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- AA07: Employee Overview
- AA08: Customer Overview
- AA09: Vendor Overview
- AA10: Tiers
- AA11: Hours Types
- AA13: SaaS File Explorer

AA01: Installing Citrix and Uniprint

 **TEAM Software** | Learning Center



Menu Proxy  
Font Awesome and  
some :visited CSS  
to change color

HTML5 video package. Could us  
MP4, YouTube, Vimeo, etc.

# TEAM Software Course Catalog



Download the catalog

Search for courses...

Custom text filter "search"

What would you like to learn more about?

All ▾

Filter - uses conditions

What solution are you working with?

All ▾

Font Awesome with  
click function

How do you prefer to learn?

All ▾

## WinTeam Overview

Average Course Length: 1 Hour

Type: With a trainer

## Master Files

Average Course Length: 2 Hours

Type: With a trainer

Foundation grid

## User Security

Average Course Length: 1 Hour

Type: With a trainer

## Payroll

Average Course Length: 4-6 Hours

Type: With a trainer

## Accounts Payable

Average Course Length: 2 Hours

Type: With a trainer

## Accounts Receivable (Recurring Invoices)

Average Course Length: 2-3 Hours

Type: With a trainer

## Accounts Receivable (via Personnel Scheduling)

Average Course Length: 2-3 Hours

Type: With a trainer

## Accounts Receivable (Collections)

Average Course Length: 1 Hour

Type: With a trainer

# Results (so far)

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# Customer Engagement

We kicked butt

- Anecdotally, clients and implementation love this
- February 2019 we had >1000% increase in course views over February 2018 (measured using Google Analytics removing TEAM Software IPs)

# Time Saved

Working on it

- All course information is now downloaded from the Learning Center instead of sent over email (eliminating the middle man)
- In progress of single sourcing all training guide information (and creating facilitator guides while we are at it)



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# Questions?

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# Contact Chris Jones

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Let me know if you have questions or comments:

[jonechr2@gmail.com](mailto:jonechr2@gmail.com)

Flare Slack: Chris Jones

Linkedin: <https://www.linkedin.com/in/chris-jones-b27a402b/>