



# Portfolio

Bethany Aguad

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# About the Portfolio

I created this portfolio as a sample of different documentation types produced through MadCap Flare.

I have provided the HTML5 version of this portfolio on my website: [bethanyaguad.com](http://bethanyaguad.com).

## Document Types

Within this portfolio, I have created the following document types:

- "MadCap Flare Document Design" on the next page
- "MadCap AMS Proposal" on page 7
- "MadCap Contributor Process" on page 16
- "Snagit Instructions" on page 17



# MadCap Flare Document Design

I designed this portfolio sample entirely in MadCap Flare.

## Features

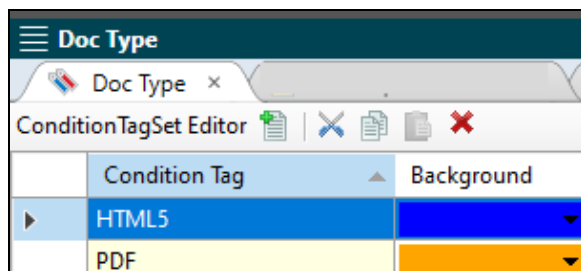
I built this PDF output using the following MadCap Flare functionality:

- Custom stylesheet, page layouts/template pages (formerly known as master pages), and skins
- Conditioned table of contents to create PDF and HTML5 versions
- Custom PDF and HTML5 targets
- Custom PDF and HTML5 mediums
- Glossary terms

## Single-Sourcing

In order to create HTML5 and PDF outputs from a single set of topics and **TOC**<sup>1</sup>, I decided to create the following condition tags:

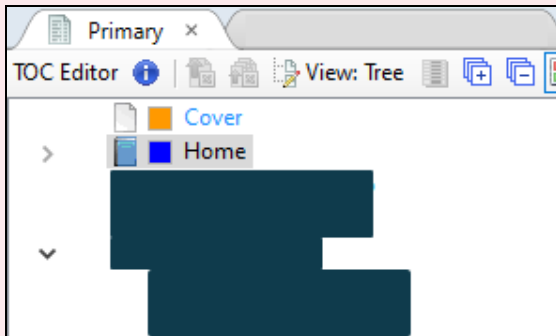
- HTML5
- PDF



For my web medium, I applied the HTML5 condition tag, and for print, I applied the PDF condition tag.

**Example:** In the TOC Editor, I applied the PDF condition tag to the **Cover topic** and the HTML5 condition tag to the **Home page** topic.

<sup>1</sup>Table of Contents



In each target, I selected to include the appropriate condition and exclude the other.

## Glossary

Rather than manually defining a few acronyms I have used, I created a glossary of acronyms used in this document.

|   | Condition                | Terms      | Definition                             |
|---|--------------------------|------------|--|
| ● | <input type="checkbox"/> | BA         | Business Analyst                       |
| ● | <input type="checkbox"/> | BDD        | Business Design Document               |
| ● | <input type="checkbox"/> | IRD        | Initial Requirements Document          |
| ● | <input type="checkbox"/> | MadCap AMS | MadCap Authoring and Management System |
| ● | <input type="checkbox"/> | RN         | Release Notes                          |
| ● | <input type="checkbox"/> | TOC        | Table of Contents                      |
| ● | <input type="checkbox"/> | TW         | Technical Writer                       |

I then selected to use this glossary in both the PDF and the HTML5 targets.

**Example:** The glossary displays differently in each output.

### PDF



## Glossary

### B

#### BA

Business Analyst

#### BDD

Business Design Document

### I

#### IRD

Initial Requirements Document

### M

#### MadCap AMS

MadCap Authoring and Management System

## HTML5

### MadCap Contributor Process

As part of my work, I designed the process to implement MadCap Contributor for Business to single-source.

#### Process Flow

I designed the following process for creating the [IRD](#), [BDD](#), and the [RN](#):

1. The [BA](#) creates the topics from templates for the [IRD](#) in Contributor.
2. The BA sends the topics through One Drive to the [TW](#).

Initial Requirements Document



# MadCap AMS Proposal

In order to justify additional MadCap Authoring and Management System (AMS) licenses for my company, I created the following proposal for our senior leadership. All company information has been redacted.

## Purpose

We need to select a desktop authoring and content management technology that will supply a complete solution for publishing documentation across products for the documentation team. The chosen product should be integrated with existing processes from other departments and streamline our procedures.

## Users and Stakeholders

This new solution would be used by the technical writers for authoring documentation, business analysts for reviewing changes, and publishing coordinators to publish the documentation.

By integrating with a documentation management tool during the development process, we can streamline the entire end-to-end documentation process from initial requirements to published documentation.

## Benefits

With a new tool to support a streamlined process, we hope to:

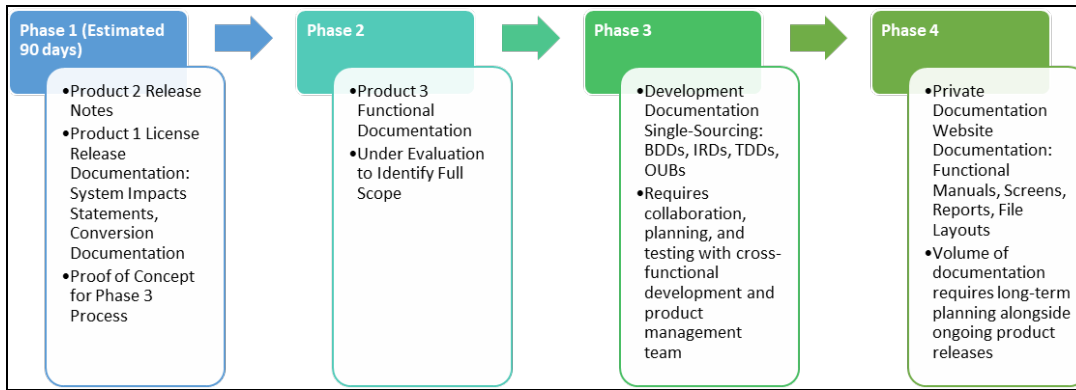
- Save time with single-source and topic-based authoring as authors and reviews work on a document in a single place, streamlining comments and updates
- Current team is already publishing documentation for multiple products and more resources are needed to take on more documentation
- Out-of-the-box tool with features we need reduces tools team's time supporting our sites and processes
- Well-structured, interlinked, keyword-rich content assists customers with using our help documentation

## Content Management Initiative

We have divided this initiative into phases in order consider all the different needs of the documentation process.



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This request outlines the need for a new tool for phase one which scales up to meet the documentation needs for all the phases.

| Phase  | Goal   |
|--|--|
| 1: Product 1 Release Notes & Product 2 License Release Documentation | <p>Author and publish all Product 1 release notes using <b>MadCap AMS<sup>1</sup></b> to reduce time spent on authoring and publishing.</p> <p>Publish all Product 2 license release documentation to the Customer Site using MadCap AMS.</p>  |
| 2: Product 3 Functional Documentation                                | <p>Author and publish Product 3 functional documentation using MadCap AMS to reduce time spent on authoring and publishing.</p> <p><b>Note:</b> This is identified as phase 2 because we are still working with the Product 3 team to determine the priority for the different documentation needs and the resources that meets those needs.</p>                 |
| 3: Development Documentation Single-Sourcing                         | <p>Author and publish Product 1 development documentation by single-sourcing within the new tool. Authoring time is reduced, and publishing is consistent.</p> <p><b>Note:</b> This is identified as phase 3, but we are already working with the development team to define a process to reduce redundancy and streamline complexity for the documentation.</p> |

<sup>1</sup>MadCap Authoring and Management System





| Phase  | Goal  |
|--|---|
| 4: Private Documentation Website Documentation | <p>Author and publish Product 1 documentation to Private Documentation Website for all releases.</p> <p><b>Note:</b> This identified as phase 4, because the volume of documentation requires long-term planning alongside ongoing product releases</p> |

## Features

We have reviewed our existing tools and processes to determine which requirements are met by current technology, and which features we need in a new tool to improve the quality and consistency of our documentation for our customers. The following features must be considered in selecting a new authoring platform and content management system.

| Functionality Required  | Current State   | Description   |
|-------------------------|---|---|
| Analytics               | Limited in availability   | Data on customer use of our documentation   |
| Authoring               | Separate tools by product   | Drag-and-drop, XML, or WYSIWYG editor, suite of editing tools                     |
| Consistent Styles       | Not available   | Topic template library, layouts, and themes to ensure consistency across products |
| Import Existing Content | Needs to be considered for extensive existing documentation                 | Import HTML, Word docs, and other formats   |
| In-app Help             | Only link to screen and DB doc in Product 1, no other in-app help available | Integrate into web applications to create in-app help system, guides              |
| Manage Reviews          | Manual processes  | Collaboration tools, multi-user editing, and review process in tool               |



| Functionality Required                            | Current State             | Description  |
|---|---------------------------|--|
| Multi-channel Publishing                          | Not available             | Can publish HTML5 output, Word documents, PDFs, or custom pages to ServiceNow                    |
| Project Tracking                                  | Manual processes          | Project management functionality tied directly to documentation through central portal           |
| Publish Content for Specific Audiences            | Manual processes          | Define specific content for different audiences (customers) for our products                     |
| Search  | Needs improvement         | Content or topic search engine or search tool with customizable filter, search relevance ranking |
| Single-sourcing Content                           | Not available             | Customizable content library, reuse content across documents                                     |
| <b>SME</b> <sup>1</sup><br>Authoring/Contributing | Manual processes          | BAs providing feedback on documentation  |
| Source Control                                    | Separate tools by product | Single location where all our documentation is backed up   |

## Candidates

The team reviewed twelve potential products. The following candidates were excluded from consideration for failure to meet our requirements.

| Candidate Excluded | Reason for Exclusion                               |
|--------------------|--|
| Adobe RoboHelp     | Not ideal for a single documentation website       |
| Author-it          | Complicated and challenging to learn and implement |

<sup>1</sup>Subject Matter Expert



| Candidate Excluded | Reason for Exclusion  |
|--------------------|---|
| ClickHelp          | Limited to 2000 topics  |
| Confluence         | Built for interactive wiki than robust authoring                      |
| Doc-to-Help        | Only integrates with Word, not a new authoring tool                   |
| Document360        | Limits monthly page visits based on plan                              |
| easyDITA           | Limits unique files to 1500 per author                                |
| HelpNDoc           | Not structured content  |
| WalkMe             | A customer service management tool, not a tech doc authoring platform |

We narrowed down the candidates to three complimentary products from MadCap Software.

| Candidate Name                      | Vendor | URL   |
|-------------------------------------|--------|---|
| Flare                               | MadCap | <a href="https://www.madcapsoftware.com/products/flare/">https://www.madcapsoftware.com/products/flare/</a>   |
| Central                             | MadCap | <a href="https://www.madcapsoftware.com/products/central/">https://www.madcapsoftware.com/products/central/</a>   |
| Authoring & Management System (AMS) | MadCap | <a href="https://www.madcapsoftware.com/products/authoring-management-system/#content">https://www.madcapsoftware.com/products/authoring-management-system/#content</a> |

## Analysis

The following chart describes the advantages and disadvantages of each candidate.



| Candidate Name | Advantages  | Disadvantages   |
|----------------|---|---|
| Flare          | <ul style="list-style-type: none"> <li>• Content importing with a drag-and-drop workflow</li> <li>• Content explorer tool for organizing a project's content-related items</li> <li>• Both XML and text editor in real-time with a split view</li> <li>• Microcontent authoring for feeding chatbots</li> <li>• Password-protected user access with privatized output</li> </ul>        | Publishing learning curve can be steep, and but authoring is accessible to your average user        |
| Central        | <ul style="list-style-type: none"> <li>• Upload and Host MadCap Flare Projects</li> <li>• Monitor Projects with the Project Dashboard</li> <li>• Secure Hosting with Disaster Recovery</li> <li>• Concurrent Multi-User Authoring and Review</li> <li>• Create a Project Files Checklist</li> <li>• Business Intelligence and Data Analytics on Flare-Generated HTML5 Output</li> </ul> | Would require training for the team to get up to speed on new project management/publishing process |



| Candidate Name                      | Advantages   | Disadvantages   |
|-------------------------------------|--|---|
| Authoring & Management System (AMS) | <ul style="list-style-type: none"> <li>Includes all the features of Flare and Central</li> <li>Publish doc to ServiceNow</li> <li>2 <b>SME</b><sup>1</sup> Licenses</li> <li>30GB Cloud storage</li> </ul> | Same as above, but includes MadCap's industry-best training and support |

## Key Considerations

With authoring, publishing, and cloud-based content management, we can streamline the entire content development lifecycle with **MadCap AMS**<sup>2</sup>. MadCap AMS is the industry-standard technical documentation tool that addresses our feature needs better than any other tool we reviewed.

| Functionality Required   | MadCap AMS Feature   |
|--------------------------|--|
| Analytics                | Web output connected to MadCap's analytics display   |
| Authoring                | Industry-best authoring tool allowing robust formatting  |
| Consistent Styles        | Brand alignment across all content channels with powerful CSS and style controls   |
| Import Existing Content  | Import HTML, Word docs, and other formats and map styles to match new format   |
| In-app Help              | Can publish web help output to be published along with an app  |
| Manage Reviews           | Access for anyone in the organization to contribute and review content, using a powerful cloud-based editing (no software installation required) review workflow |
| Multi-channel Publishing | Can publish multi-format output, i.e. HTML5 Word documents, PDF, ServiceNow, etc.  |
| Project Tracking         | Online portal for project tracking eliminates spreadsheets and other non-integrated project management applications  |

<sup>1</sup>Subject Matter Expert

<sup>2</sup>MadCap Authoring and Management System



| Functionality Required                            | MadCap AMS Feature  |
|---|---|
| Publish Content for Specific Audiences            | Conditional tags for content allow authors to set content to display for specific audiences   |
| Search  | HTML5 publishing supplies robust search   |
| Single-sourcing Content                           | Streamlined process for creating and delivering documentation through content reuse and single-source                               |
| <b>SME</b> <sup>1</sup><br>Authoring/Contributing | Workflows to make it easy for SMEs to add and edit content plus, allows authors to accept, reject, reorganize, and reformat content |
| Source Control                                    | All documentation projects stored in the cloud through MadCap Central's servers   |

MadCap AMS supplies an online portal that provides a view of all documentation projects, making it easy to determine the status of current work. Flare, as part of MadCap AMS, supplies robust authoring functionality, which allows for significant content reuse. This also allows authors to publish documentation to HTML5 output, with clean layouts, consistent branding, and improved search functionality.

## Recommendation

Purchasing **MadCap AMS**<sup>2</sup> licenses would allow us to scale up our documentation process while improving the quality and availability of our documentation across products. Each MadCap AMS license includes:

- MadCap Flare Authoring License
- MadCap Central Author Seat
- MadCap Central Subject Matter Expert Seats (x2)
- MadCap Capture
- MadCap Mimic
- Introductory Training Course
- MadCap Connect for ServiceNow

<sup>1</sup>Subject Matter Expert

<sup>2</sup>MadCap Authoring and Management System



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- Platinum Support
- 30GB Cloud Storage

Our recommended choice is the MadCap Authoring & Management System since it meets existing needs and supplies support for new features as we publish documentation for more products.



# MadCap Contributor Process

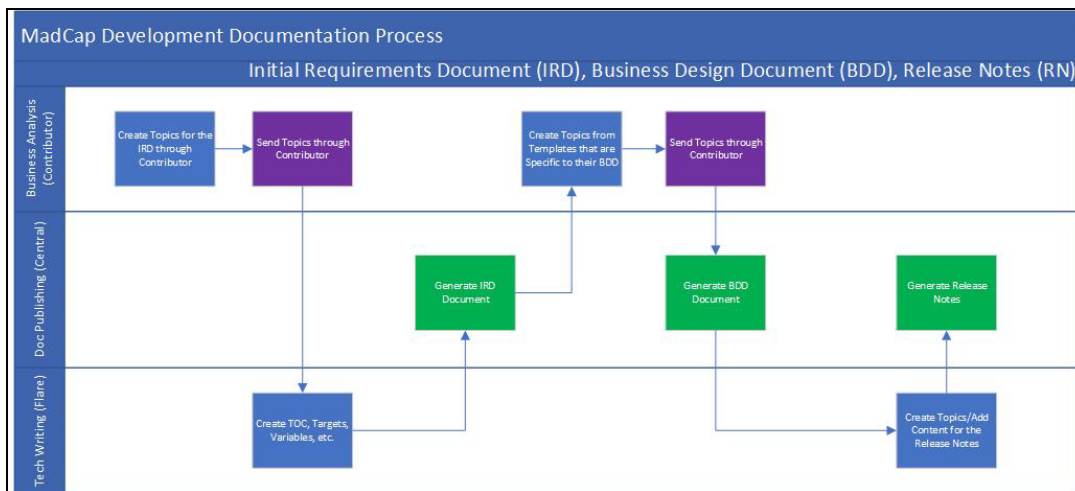
As part of my work, I designed a process to implement MadCap Contributor for BAs, serving as authors, to create single-sourced development documentation.

## Process Flow

I designed the following process for creating the **IRD**<sup>1</sup>, **BDD**<sup>2</sup>, and the **RN**<sup>3</sup>:

1. The **BA**<sup>4</sup> creates the topics from templates for the IRD in Contributor.
2. The BA sends the topics through One Drive to the **TW**<sup>5</sup>.
3. The TW imports the topics and creates the **TOC**<sup>6</sup>, targets, variables, etc. in order to generate the IRD PDF.
4. The BA creates additional topics from templates in Contributor for the BDD.
5. The TW imports the topics in order to generate the BDD PDF.
6. The TW creates additional topics and adds content to the existing topics to generate the RN HTML5.

I created a high-level process flow to illustrate document handoffs.



<sup>1</sup>Initial Requirements Document

<sup>2</sup>Business Design Document

<sup>3</sup>Release Notes

<sup>4</sup>Business Analyst

<sup>5</sup>Technical Writer

<sup>6</sup>Table of Contents





# Snagit Instructions

I use Snagit and Snagit Editor on a daily basis to create images for documentation and to put together quick screenshots to communicate complicated information. Below is one of my favorite processes to complete in Snagit Editor 2021.

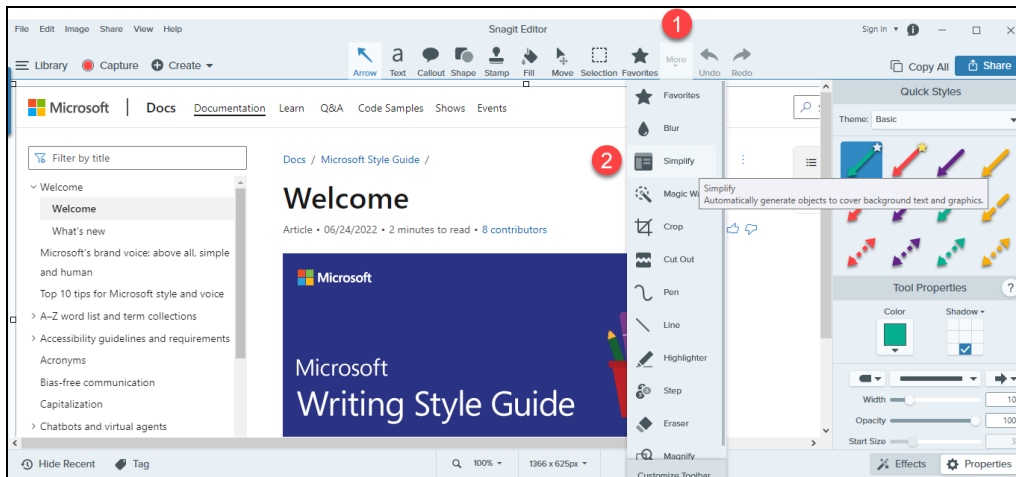
## Auto Simplify UI

Techsmith added a new feature with Snagit 2021 that allows you to hide **UI**<sup>1</sup> elements automatically.

1. Open a screen capture in **Snagit Editor**.

**Note:** By default, taking a screen capture in Snagit will open it in Snagit Editor.

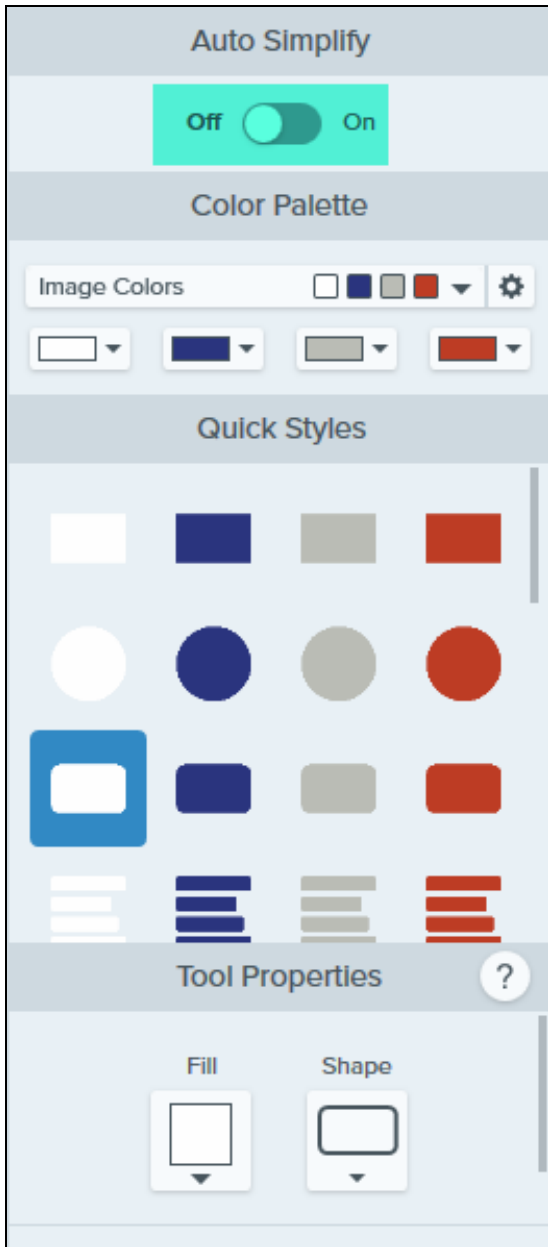
2. On the ribbon, select **More > Simplify**.



**Outcome:** The Auto Simplify panel opens.

3. Toggle Auto Simplify to **On**.

<sup>1</sup>User Interface

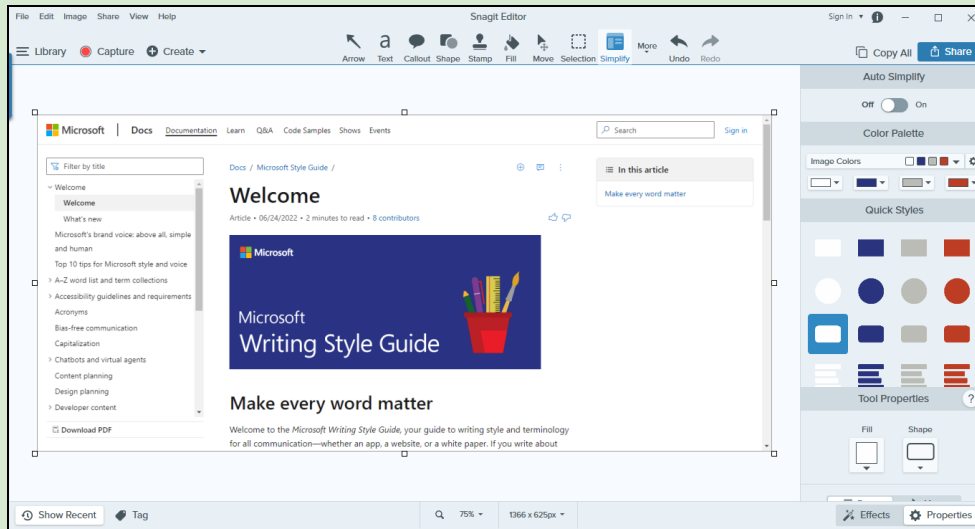


**Outcome:** All UI elements are hidden.

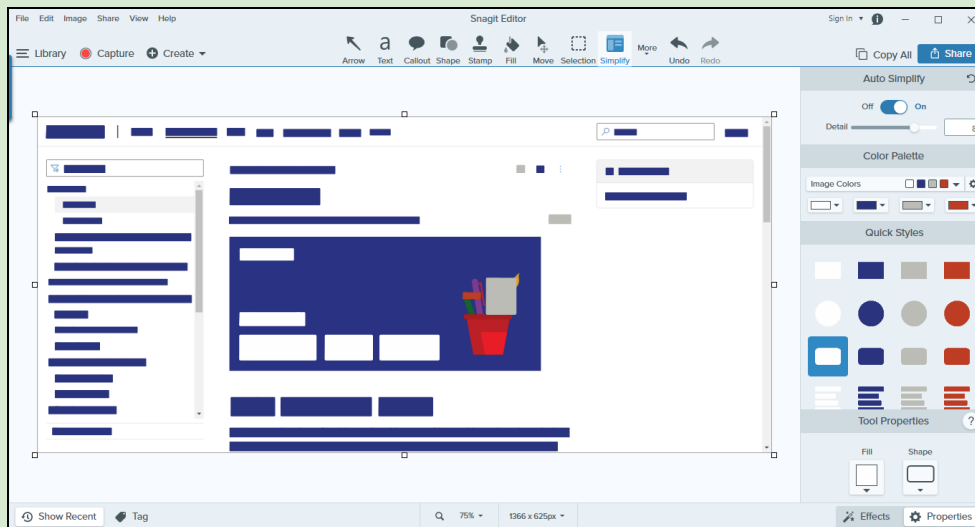
**Before:**



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## After:



4. Select and delete blocks to reveal sections of the UI that you want to highlight.



# Glossary

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## B

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### **BA**

Business Analyst

### **BDD**

Business Design Document

## I

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### **IRD**

Initial Requirements Document

## M

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### **MadCap AMS**

MadCap Authoring and Management System

## R

---

### **RN**

Release Notes

## S

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### **SME**

Subject Matter Expert

## T

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### **TOC**

Table of Contents

### **TW**

Technical Writer



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**U**

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**UI**

User Interface