madskills

MADCAP FLARE

Introductory Training Guide

madcap software

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This is version 2022 of the course guide.

Author

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Created with MadCap Flare.

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Course Overview

What You Will Learn

In this module, you will learn how to:

- Use this course guide
- Use the course files to complete the exercises

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Welcome

Welcome to MadCap Software's authorized Flare Introductory training course. This course will explain how you can use Flare to create:

- MadCap HTML5 targets
- Adobe PDF documents

Audience

This course was designed for new Flare users.

Course Overview

This course uses a combination of feature overviews and demonstrations to introduce the core features of Flare. By the end of the course, you will have the skills you need to get started on your first Flare project.

Course Guide

The course guide is divided into the following modules:

- Getting Started
- Importing Content
- Adding Content
- Linking Content
- Designing Content
- Single Sourcing Content
- Topic Reviews
- Building Targets

Conventions

The steps in each module have an area to the right that contains details that only apply to our course project. We created the training manual this way so that you could follow the steps later while completing your own project. During the course, you should read

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each step in the left column and then look in the right column to see if there are any additional class-related instructions for that step.

Each module ends with a "Learning More" section that references the Flare online help system and mentions more advanced topics that are covered in other classes. We encourage you to use the help after the course because the help is the most comprehensive and up-to-date source of information about how to use Flare. We will show you how to access the online help for Flare in the next module.

This guide uses the following icons:

Icon	Name	Description
	Help	Help topics that can provide you with more detail.
	Note	Additional information about a subject.
	Tip	Best practices or shortcuts.

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Preparing Your Computer for the Course

You will need to install some course files and Flare to complete this course.

To install the course files

1. Open your browser and enter the following URL.
   http://training.madcapsoftware.com/FlareIntroTraining.zip
2. When prompted to download the file, click **Save**.
3. Create a folder in your C: drive named **Flare Intro Training**.
4. Save the zip file to the c:\flare intro training folder.

   NOTE You will want to save this zip file in case you want to complete the exercises again in the future.

5. Right-click the downloaded zip file and select **Extract All**.

6. Click **Extract**.
   You should now have a folder named Flare Intro Training with two folders inside it: Files and Cities.

To install Flare

The course setup files do not include a copy of Flare. You will need to either purchase a licensed copy of Flare or install a trial version on your computer to complete this course.

> NOTE If you complete this course using a trial version of Flare, your output will be scrambled in the preview and output.

1. Make sure your computer has the following software installed on it.
   - Microsoft Windows 10 or later
   - Microsoft .NET Framework version 4.8 or later
   - Ghostscript - https://www.madcapsoftware.com/downloads/ghostscript64.aspx
     Ghostscript is a free application that Flare uses to handle PDF and EPS files.
2. Install Flare from the MadCap Software website or your installation CD.
3. Open Flare and select **Help > Check for Updates**. Install any available updates.

Recommended Browser

Please install Microsoft Edge to use during this course. Feel free to install any additional browsers for testing, if needed.

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Getting Started with Flare

What You Will Learn

In this module, you will learn how to:

- Navigate the Flare user interface
- Use Flare's online help system
- Create a project
- Open a project

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What Is Flare?

Flare has numerous features which can be used to add, link, design, and single source content to create as many outputs (called "targets") as you need. In this class, we will focus on "the basics" of using the boldfaced features in the table below. In the Intermediate and Advanced classes, we cover all of these features (and others) in much more detail.

Task	Supporting Flare Feature
Adding content	**Projects** **Topics** **Tables** **Images** **Videos**
Importing content	Doc-to-Help project imports RoboHelp projects imports HTML Help project imports DITA imports HTML imports Markdown imports Excel imports **Word imports** FrameMaker imports
Linking and layering content	**Hyperlinks** **Cross references** Popup links Bookmark links

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Task	Supporting Flare Feature
	Drop-down links, expanding links, and toggler links
	Related Topics, Keyword, and Concept links
	Relationship Table links
	Table of contents
	Index
	MadCap Search, Google Search, and Elasticsearch
	Glossary
Designing content	Responsive design
	Stylesheets
	Responsive layouts
	Table stylesheets
	Template pages
	Proxies
	Page layouts
	Skins and component skins
Single sourcing content	**Condition tags**
	Variables
	Date/Time and system variables
	Snippets
	Snippet conditions
	Snippet variables
	Project links
	External resource links
	Micro content

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Task	Supporting Flare Feature
Sending topics for review	Track changes Annotations Topic reviews
Building targets	HTML5 Clean XHTML WebHelp and WebHelp Plus HTML Help and Eclipse Help PDF documents Word documents DITA documents EPUB and MOBI files Batch targets Publishing destinations
Managing projects	Source control Sharepoint integration Context-sensitive help Meta tags File tags Analysis reports Project reports

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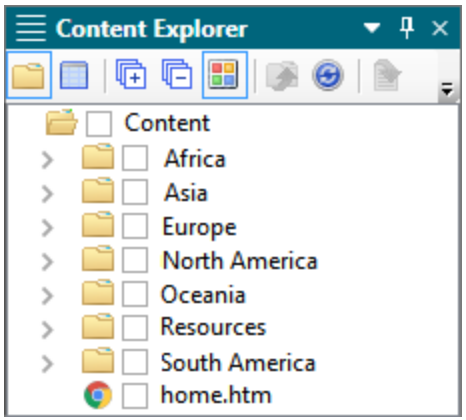
Getting Around in Flare

Flare's UI is divided into five areas: left pane, editing pane, right pane, ribbon, and toolbars.

Left Pane

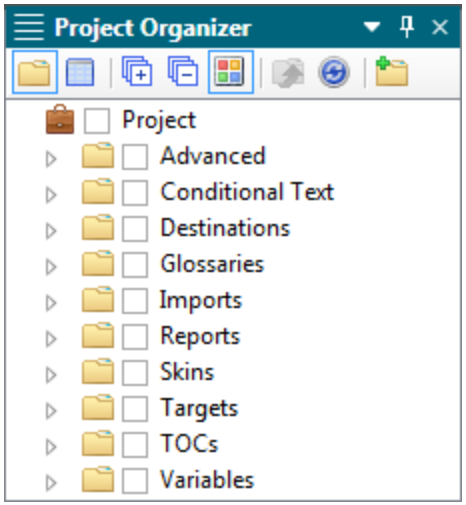
The most important windows in the left pane are the Content Explorer and Project Organizer. They are arranged in an accordion to save space.



Content Explorer

The Content Explorer is used to manage topics, images, template pages, page layouts, snippets, style sheets, and table stylesheets. You can organize your content using folders.

All content except topics appears under the Resources folder by default.



Project Organizer

The Project Organizer groups the project-level features into folders. For instance, Conditional Text, Glossaries, and Variables.

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Other windows that may appear in the left pane include:

Window	How It's Used
Backups	View a list of backups and restore one if needed.
Contributions	Review and approve new topic from contributors.
External Resources	Import content that is stored outside your project, such as an image on a network drive.
Instant Messages	View and send instant messages.
MadCap Central	Log in to MadCap Central, bind projects to Central, and import projects from Central.
SharePoint Explorer	Import content from SharePoint.
Source Control Explorer	Perform source control actions, including checking files in and out.
Topic Reviews	Review and approve topic annotations and changes.

TIP If you don't see the Project Organizer or Content Explorer, select **View > Project Organizer** or **View > Content Explorer**.

Editing Pane

The editing pane appears in the middle of the Flare main window. You can use it to change topics, TOCs, and stylesheets. Each type of file has its own editor such as the XML Editor for topics, the TOC Editor for the TOC, and the Stylesheet Editor for the stylesheets.

You can open multiple windows in the editing pane. Each window appears as a tab at the top of the editing pane. You can even click and drag the tabs to rearrange them. In the example above, there are two windows open: the North America topic and the Start Page.

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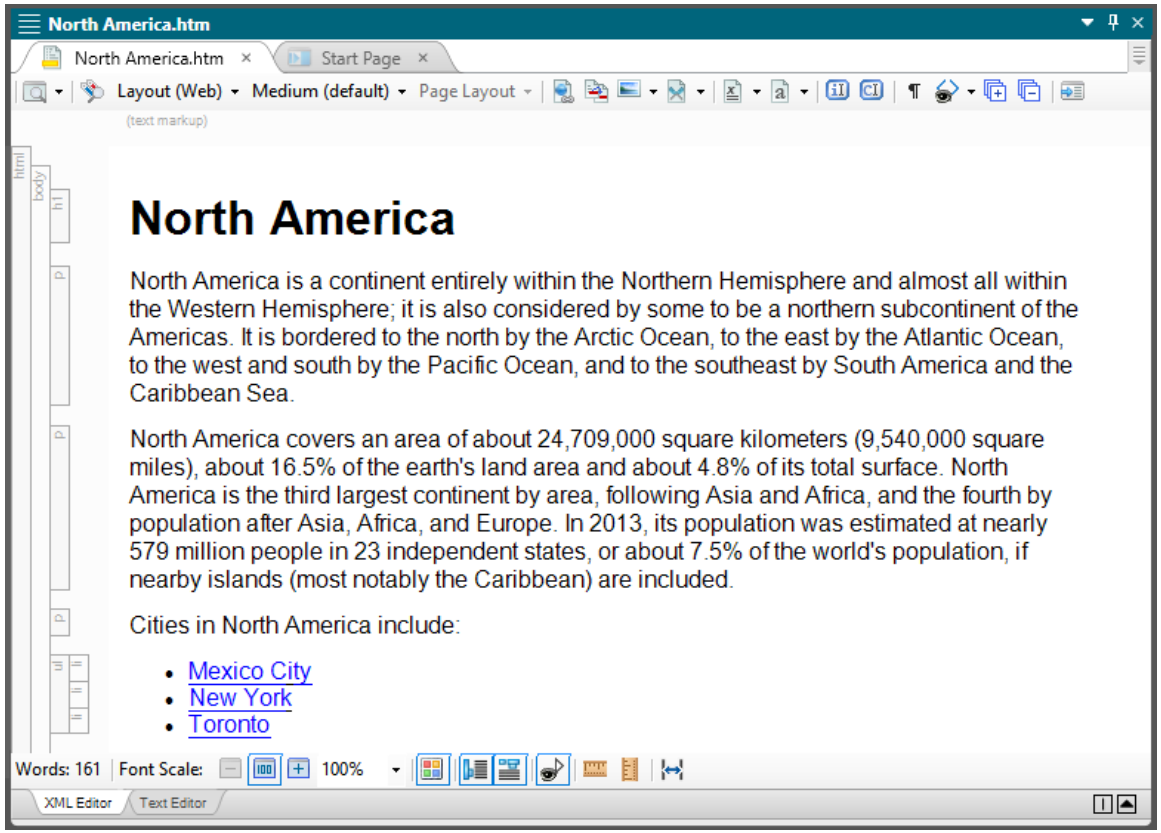

Start Page

On the Start Page, you can open an existing project, create a new project, open Flare's help system, visit the Flare Help Community, and view news and updates from MadCap Software. Make sure you visit the Flare Help Community regularly to stay in touch with the Flare user community.

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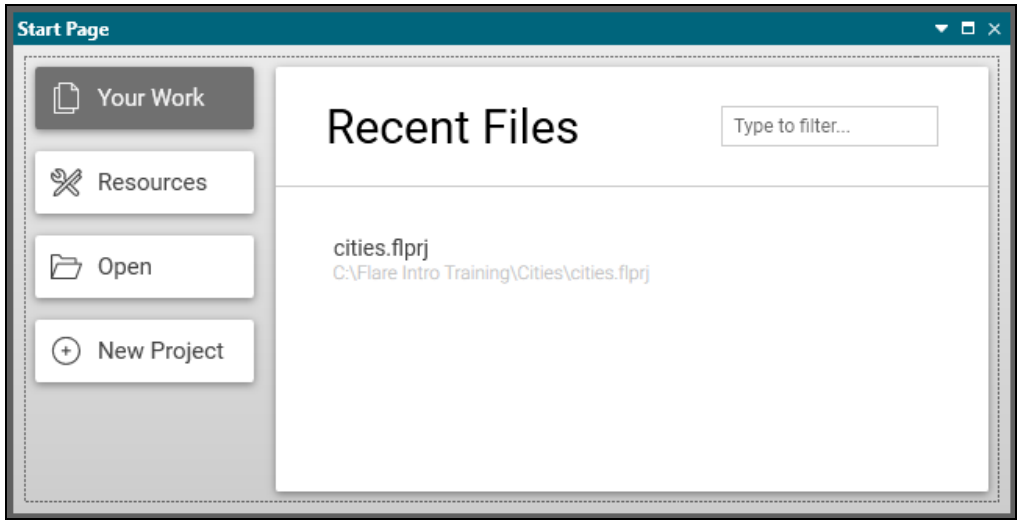

TIP If you don't see the Start Page, select **View** > **Start Page**.

Right Pane

The following windows open by default in the right pane.

Window	How It's Used
Attributes	View and change the attributes of selected content.
Concepts	Insert Concept (See Also) entries into topics.
Find and Replace in Files	Find and replace text in files.
Find Elements	Find HTML tags, Flare-specific content, or style classes.
Footnotes	View the footnotes that have been added to the option topic.
Formatting	Review and modify style settings.
Glossary Terms	Add glossary terms and definitions.
Hyphenation	Add and modify hyphenation rules for words.
Index	Insert index keywords into topics.

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Window	How It's Used
Local Formatting	Override style settings for specific content in a topic.
Responsive Layout	Create and insert responsive layouts.
Spell Check	Check your project for spelling errors.
Styles	View and apply styles to content.

TIP You can move any of the windows in Flare to your preferred location.

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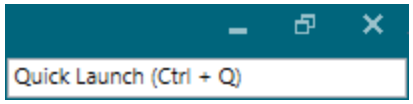
Ribbon

The ribbons menus include:

- Home
- Insert
- View
- Project
- Analysis
- Review
- Tools
- Source Control (if your project is bound to source control)
- Table
- eLearning
- Window
- Help

Finding a File or Command

You can use the Quick Launch bar in the upper right of the Flare window to find a command or file. Click inside the Quick Launch bar or press Ctrl-Q and type the name of the command or file.



Closing a window

To close a window, click in the title bar of the window.

Flare's Help System

Flare has an extensive help system to answer your questions as you explore new features. By default, the help opens from the web in your default browser. If you can't connect to the web or need to view the help offline, you can set Flare to use a local version of the help system in the Options dialog box on the General tab.

TIP The Flare help system Flare includes several video tutorials that you may want to complete after this class as a refresher.

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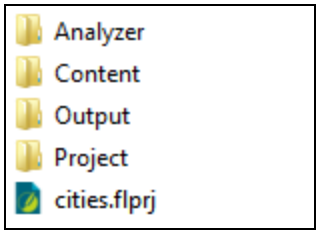
What Is a Project?

In Flare, a project is a container for all of the files and settings that will be used to create your target(s). A project includes:

- Content that you create, insert, and import into Flare
- Project settings you specify to control the behavior of online targets
- Targets that you build

Project Files

When you create a project, you are prompted to specify a project name and a folder where you want to store the project files. After creating a project, you can look at the project folder in Windows Explorer.



Notice that the project folder contains a .flprj file. This file is called the **project file**.

Double-clicking the project file will open the project in Flare.

Folder Name	What's in this Folder?
Analyzer	A SQL Compact database that contains information for Flare's Analyzer reports, such as broken links.
Content	All of your content, including topics, images, videos, sounds, and style sheets. Any folders that you create in the Content Explorer will also appear in the "Content" folder.
Project	Project files, including browse sequences, conditional tag sets, publishing destinations, glossaries, skins, targets, tables of contents, and variables.
Output	All built targets for the project, such as HTML5 or print documentation.

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Creating a Project

Creating a project is the first thing you do when you start to use Flare. There are numerous ways that you can create a project:

- Create a project based on a template
- Import a non-Flare project, such as a Doc-to-Help, RoboHelp, or HTML Help project
- Import Confluence pages
- Import a DITA document set
- Import an Excel workbook

- Import a FrameMaker document
- Import an HTML file or files
- Import Markdown files
- Import a Word document

How Many Projects Do You Need?

You can build multiple targets from a single project. If you have different projects that share a large amount of content or are only slightly different in content and structure, you should probably combine them into a single project.

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Opening a Project

Let's open an existing Flare project. Our "Cities" project is in the Flare Introductory Training folder.

To open a project:

1 Select **File** > **Open**.
The Open dialog box appears.

2 Locate and select the Flare project.
Flare project files have a .flprj extension.

3 Click **Open**.
The project opens in Flare.

Class project notes

Select **c:\flare introductory training\ cities\cities.flprj**.

Learning More

Flare Help

The Flare help contains numerous useful topics about projects:

Interface and Files > Primary Window Panes

- Content Explorer
- Project Organizer

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Sharing files between Flare projects
- Binding a project to source control

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Adding Content

What You Will Learn

In this module, you will learn how to:

- Create a topic
- Change a topic
- Create a bulleted list
- Create a numbered list
- Insert an image into a topic
- Insert a video into a topic
- Add a table
- Preview a topic
- Find and replace text
- Spell check your topics

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About Topics

A "topic" is a chunk of information about a subject. For example, in this guide every heading 1 and heading 2, like the "About Topics" heading above, starts a new topic. When users view an online target, they only see one topic at a time.

A topic should answer a specific question like “how do I do this?” or “when should I do this?” or “how can I fix this?”. The length of your topics will vary, but they should be brief, focused, and easy to scan. If you’re not sure that a topic answers a specific question, you may not need the topic.

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Images and Videos

In addition to text, topics can contain images and videos. You can create and modify your images and videos in any application, including MadCap Capture and MadCap Mimic.

MadCap Capture

MadCap Capture is a free screen capture and image editing program that includes several useful features:

- Profiles – You can use profiles to apply settings (such as width and height) automatically when they are captured.
- Layers – You can add text callout layers that are easy to update.
- Single-source images – You can specify different images resolutions for different outputs. For example, you can specify a resolution of 72 DPI for online targets and 300 DPI for print targets.
- Palettes – You can save objects such as shapes to reuse in images.

MadCap Mimic

MadCap Mimic is a video-capture and editing program that uses advanced compression techniques to create much smaller videos than other video editing programs. All of the videos in Flare’s online help were created with MadCap Mimic.

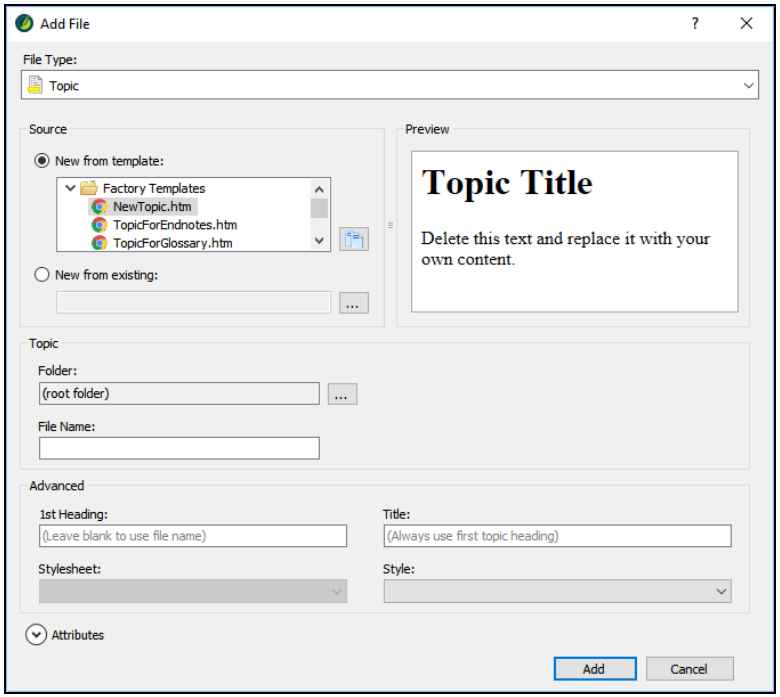
Creating a Topic

Let's create a new topic.

To create a topic:

1 Select **File** > **New**.

The Add File dialog appears.



2 In the **File Type** section, select **Topic**.

3 Select a **Source**.

Class project notes

Select **New from template** and select the **NewTopic.htm** template.

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4 Select a **Folder**.

Click ... and select the **North America** folder.

5 In the **File Name** field, delete the name “NewTopic” and type a new name for the topic.

Type **San Francisco**.

6 Click **Add**.

The topic is added to the Content Explorer and opens as a new tab in the XML Editor.

7 Select **Save All**.

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Changing a Topic

Let’s add content to our new topic.

To change a topic:

1 Open a topic.

Class project notes

Open the **San Francisco** topic in the North America folder.

2 Type your content.

Replace the default topic text with:

San Francisco

San Francisco is a hilly city surrounded by the Pacific Ocean and San Francisco Bay.

San Francisco is known for its year-round fog, iconic Golden Gate Bridge, cable cars, and colorful Victorian houses.

3 Select **Save All**.

XML Editor Toolbar

Below is a summary of the XML Editor toolbar icons.

Top toolbar

Icon	Name	Description
	Preview	Opens a new window with the current topic so you can see how the topic will appear to your users. The preview can be used to test conditional tags.
	Select condition tags for viewing	Opens the Conditional Text dialog box, which lets you select condition tags to hide content in the XML Editor or when sending a topic for review.
	Layout	Toggles between the Web, Tablet, Mobile, and Print layout views in the XML Editor.
	Medium	Toggles between stylesheet mediums (alternative set of styles for different outputs) for viewing the topic in the XML Editor.
	Page Layout	Toggles between page layouts and pages when the Layout is set to Print.
	Insert a Hyperlink	Opens the Insert Hyperlinks dialog box, which lets you create a hyperlink to other content.
	Insert a Cross Reference	Opens the Insert Cross Reference dialog box, which lets you insert a cross reference to another topic.
	Insert an Image	Opens the Insert Image dialog box, which lets you insert an image.
	Insert a Snippet	Opens the Insert Snippet Link dialog box, which lets you insert a snippet.
	Insert a Variable	Opens the Variables dialog box, which lets you insert a variable.
	Quick Character	Inserts a quick character, such as a copyright symbol, into a topic. You can click the arrow to select a character to insert.
	Index Entry Mode	Toggles between typing content and typing index markers.

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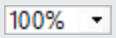
Icon	Name	Description
	Concept Entry Mode	Toggles between typing content and typing concept markers.
	Show/Hide Space	Shows/Hides paragraph and space markers.
	Show Tags	Provides display options for the XML Editor, including showing/hiding tags, bookmark names, variable names, and index and concept markers.
	Expand All Collapsed Tags	Expands all collapsed tags.
	Collapse All Headings	Collapses all content into the highest heading leve
	Open Text Editor	Opens the topic in the Text Editor, where you can view and modify the XHTML code.

Bottom toolbar

Icon	Name	Description
	Smaller Font	Reduces the font scaling by 10%.
	Reset Font Scaling	Resets the font scaling to 100%.
	Larger Font	Increases the font scaling by 10%.
	Set Font Scaling	Displays a list of common font scaling settings, like 200%.
	Show/Hide Condition Tags	Shows/Hides condition tag highlighting in the XML Editor, block bar, and span bar.
	Show/Hide Blocks	Shows/Hides the block bar on the left side of the XML Editor.
	Show/Hide Spans	Shows/Hides the span bar at the top of the XML Editor.
	Show/Hide Indicators	Shows/Hides the collapsed content arrow in the block bar.
	Show/Hide Horizontal Ruler	Shows/Hides the horizontal ruler at the top of the XML Editor. Right-click the ruler to change the measurement units.

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Icon	Name	Description
	Show/Hide Vertical Ruler	Shows/Hides the vertical ruler on the left of the XML Editor.
	Show/Hide Layout Resizer	Shows/Hides the layout resizer bar at the top of the XML Editor.

Advanced XML Editor Functionality

You don't have to know XHTML to use Flare. However, the XML Editor has some useful features you can use if you learn the basics of XHTML tags.

d o n o t c o p y

Why does the cursor appear as a left or right bracket in the XML Editor?

When you move the cursor in the XML Editor, it changes between an I-beam, a left bracket, and a right bracket cursor. The left and right brackets indicate whether the insertion point is inside or outside a set of XHTML tags without opening the Text Editor.

For instance, say we want to add text after the word "Properties" in the following example.

1. Select the file.
2. From the right mouse menu select **Properties**.
3. Set any of the options and click **OK**.

The word "Properties" is tagged as bold text. There is a closing tag between the word "Properties" and the period at the end of the sentence. For example, the code would look like:

```
<b>Properties</b>
```

If we click between Properties and te period at the end of the sentence, we see the left bracket cursor, indicating that the new text we type will also be bold.

Properties]

If we press the right arrow on the keyboard, we see the normal I-beam cursor, indicating that the cursor is now outside the tag. This cursor indicates that the newly typed text will not be bold.

Properties

What's the best way to view the XML tagging?

To view the XML tags, click the Text Editor tab. By default, the Text Editor and XML Editor tabs are at the bottom of the XML Editor.

What are the vertical and horizontal bars that I see around my topic?

The XML Editor provides structure bars above and to the left of the content area. These bars provide information about your content without having to view all of the XHTML tags.

There are two types of structure bars: tag block bars and span bars.

Tag Block Bars are displayed to the left of the content area. They show the different XHTML tags for your blocks of content, such as "p" for paragraph.

Span Bars are displayed at the top of the content area. They show any span tags contained in the selected block of content.

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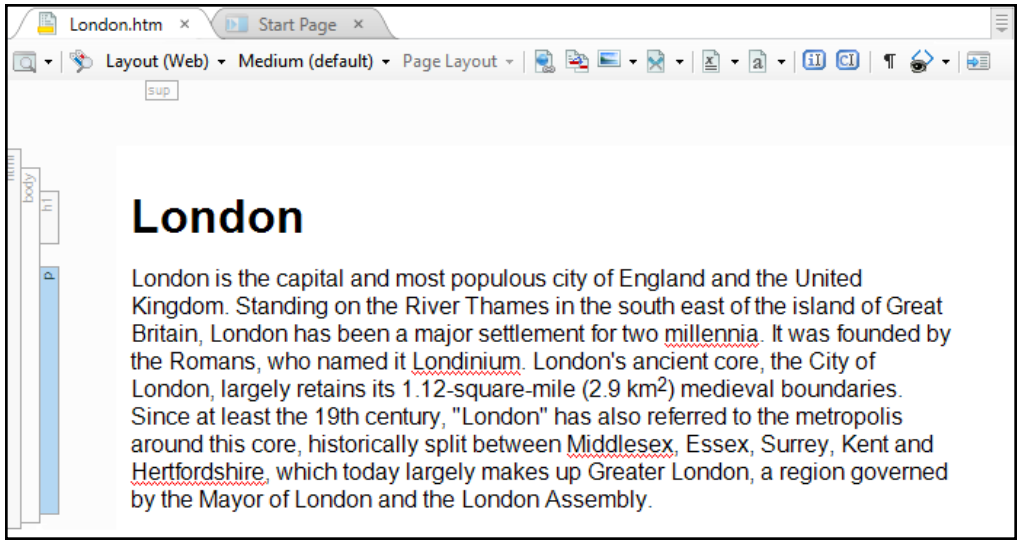

Can I collapse content blocks to make topics easier to edit?

You can right-click a heading, table, ol, ul, or div tag and select Collapse to collapse the content. If you collapse a heading, all of the content to the next heading of the same level will collapse. If you collapse a table, ol, ul, or div, the content inside the tag will collapse.

Using the Block and Span Bars

You can use the block and span bars to select and move a chunk of similarly-tagged content.

To use the span and block bars:

1. Open a topic.
2. Show blocks or spans.
3. Click a span or block.

Class project notes

Open the **San Francisco** topic in the North America folder.

Show **blocks** and **spans**.

Select the block to the left of the third paragraph.

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4 Drag the selected span or bar to a new location.

Drag the block before the second sentence. When the arrow appears, release the mouse button.

Creating a Bulleted List

Let's open a topic and create a bulleted list.

In Flare, there is one list button that creates both numbered and bulleted lists.

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To create a bulleted list:

1 Open a topic.

Class project notes

Open the **Mexico City** topic in the North America folder.

2 Position your cursor where you want to add the bulleted list or highlight the content you want to change to a bulleted list.

Highlight the list of boroughs.

3 In the Home ribbon, click the right arrow of the list button.

4 Select the **Bullet List** type.

> NOTE If you select the circle or square list type, Flare will use inline formatting to format the list. You can specify a circle or square bullet type using styles. We will discuss stylesheets later in class.

Creating a Numbered List

Let's open another topic and create a numbered list.

To create a numbered list:

1 Open a topic.

2 Select the paragraphs that you want to make a numbered list.

3 Click the right arrow of the list icon in the **Home** ribbon.

4 Select **Numbered List**.

Class project notes

Open the **Lima** topic in the South America folder.

Select the list of cities.

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NOTE If you select the lower-alpha, upper-alpha, lower-roman, or upper-roman list type, Flare will use inline formatting to format the list. If you want to use any of these numbering options, you just need to setup your stylesheet to use it. We will discuss stylesheets later in class.

Inserting an Image

You can add the following types of images to a topic:

Raster formats

- .bmp
- .gif
- .hdp
- .jpg
- .png
- .tif

Vector formats

- .emf
- .eps and .ps
- .exps
- .svg
- .wdp
- .wmf
- .xaml
- .xps

Vector images can be resized without losing their quality, and they are often used for schematics, architectural diagrams, and images that may be used at very different sizes. Raster images work well for photographs, and they are much more common on the web and better supported by older web browsers.

NOTE If you use a vector format, you can automatically convert it to a .gif, .jpg, or .png when you create an online target. You can also copy and paste an image into a topic. When you paste the image, Flare will prompt you to name the new image.

Let's add an image to a topic.

To insert an image:

1 Open a topic.

2 In the XML Editor, place your insertion point cursor where you want to insert the image.

3 Click in the XML Editor toolbar.
—OR—
Select **Insert** > **Image**.

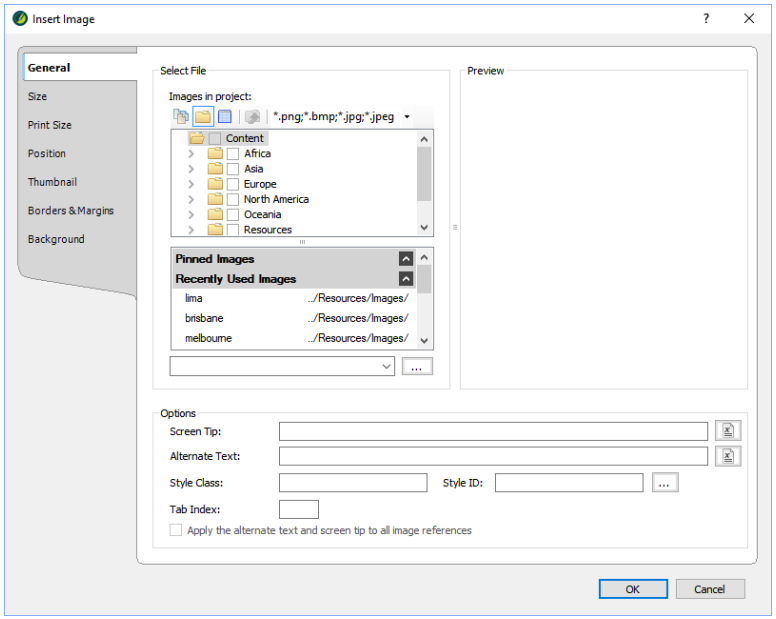
The Insert Image dialog box appears.

Class project notes

Open the **San Francisco** topic in the North America folder.

Add a blank line after the heading in the topic.

do not copy



4 For **Select File**, select an image in the project.
—OR—
Click ... and select an image file.

Click ... and select **c:\flare intro training\files\san_francisco.png**.

> TIP You can pin your most commonly-used images to the top of the list. Just hover over the image's name in the Recently Used Images list and click 📌.

5 In the **Alternate Text** field, type a description of the image.

Alternate text is recommended by accessibility guidelines such as the US Government's Section 508 and the W3C's Web Content Accessibility Guidelines (WCAG).

Type **Golden Gate Bridge**.

6 Click **OK**.

do not copy

7 When you receive the notification that the file has been copied to your current project, click OK.

The image is copied to the Resources\Images folder and appears in your topic.

TIP You can also copy and paste an image into a topic. When you paste the image, Flare will prompt you to name the new image.

do not copy

Inserting a Video

You can add the following types of multimedia files to a topic:

- .asf
- .asx
- .au
- .avi
- .m4v
- .mid
- .midi
- .mp3
- .mp4
- .mpa
- .mpe
- .mpeg
- .mpg
- .ogg
- .ogv
- .opus
- .qt
- .swf
- .u3d
- .wav
- .webm
- .wma
- .wmv

Let's add a video to a topic.

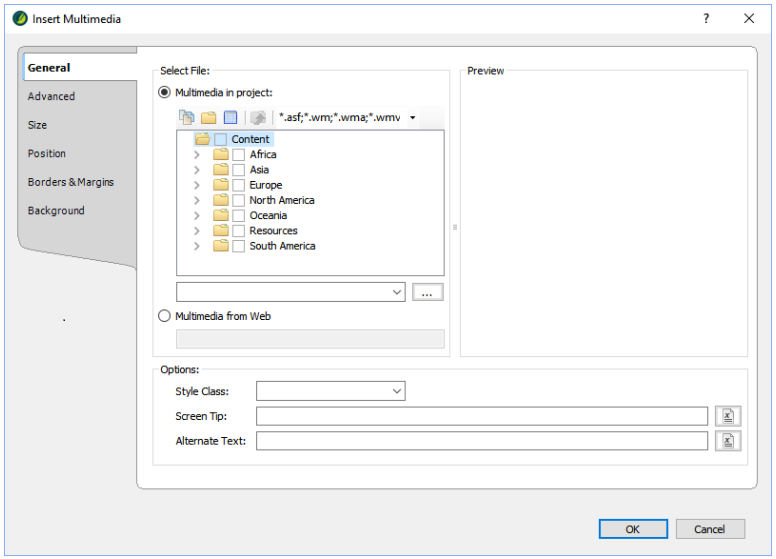
To insert a video:

1 Open a topic.

2 In the XML Editor, place your insertion point cursor where you want to insert the movie.

3 Select **Insert** > **Multimedia**.

The Insert Multimedia dialog box appears.



4 For **Select File**, select a multimedia file in the project.
—OR—
Click ... and select a file.

5 In the **Alternate Text** field, type a description of the video.

Class project notes

Open the **Santiago** topic in the South America folder.

Position the cursor on the blank line after the heading.

Click ... and select **c:\flare intro training\files\santiago.mp4**.

Type Santiago at sunset.

do not copy

Alternate text is recommended by accessibility guidelines such as the US Government's Section 508 and the W3C's Web Content Accessibility Guidelines (WCAG).

6 Click **OK**.

7 When you receive the notification that the file has been copied to your current project, click **OK**.

The video is copied to the Resources\Multimedia folder and appears in the topic as a gray box.

d o n o t c o p y

Adding a Table

Adding a table to a topic in Flare is very similar to adding a table to a document in FrameMaker or Word.

Let's add a table with three columns and five rows.

To add a table:

1 Open a topic.

2 Position the cursor where you want to add the table.

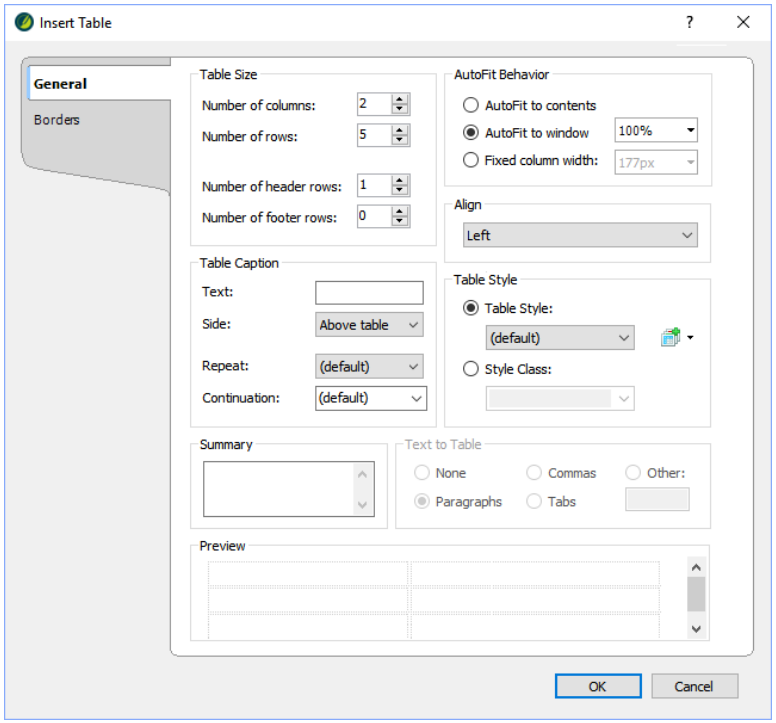
3 Select **Table** > **Insert** > **Table**.

The Insert Table dialog box appears.

Class project notes

Open the **Toronto** topic in the North America folder.

Position your cursor the bottom of the topic.



4	Type or select a **Number of columns**.	Select **3**.
5	Type or select a **Number of rows**.	Select **5**.
6	Type or select a **Number of header rows**.	Select **1**.
7	Type or select a **Number of footer rows**.	Select **0**.
8	If needed, type a **Table caption** and select a caption location.	

do not copy

9 Select a column width.

- **AutoFit to contents** – each column's width is based on the amount of content it contains.
- **AutoFit to window** – the columns are equally-sized to fit the size of the window.
- **Fixed column width** – each column is set to a specified width.

Select **AutoFit to window**.

10 Click **OK**.

11 Add content to the table.

Move the list of languages and # of speakers content into the table.

do not copy

NOTE You can select **Table** > **Enable Gridlines** to add dotted lines around your table's rows and columns.

Previewing a Topic

Let's preview a topic to see how it will look to the user.

To preview a topic:

1 Open a topic.

Class project notes

Open the **Lima** topic in the South America folder.

2 Click in the XML Editor toolbar.

The topic appears in the Preview window.

3 When you are finished previewing the topic, close the preview window.

> TIP You can leave the preview window open if you want to preview your changes while you work.

Finding and Replacing Text

You can use Find and Replace to find and replace text in topics, snippets, page layouts, template pages, stylesheets, glossaries, and tables of contents.

Let's change "Columbia" to "Colombia" in the Bogotá topic.

do not copy

To find and replace text:

Class project notes

1 Open a topic.

Open the **Bogotá** topic in the South America folder.

2 Select **Home** > **Find and Replace in Files**.
—OR—
Press **Ctrl**+**Shift**+**F**.

The Find and Replace dialog box appears.

3 In the **Find** field, type the text that you want to find.

Type **Columbia**.

4 In the **Replace with** field, type the text that will replace the found text.

Type **Colombia**.

5 Select a **Find in** option.

Select **(current document)**.

6 Select **Match case** if you want your search to be case sensitive.

Select **Match case**.

7 Click **Replace All**.

NOTE You can press **Ctrl+F** to open the quick find or **Ctrl+H** to open the quick replace. The quick find and quick replace will find and replace only in the current topic.

Spell Checking a Topic

You can spell check your topics while typing or by using the spell checker. As you type, Flare will underline unrecognized words with a jagged red line.

Let's look at the spell check while typing feature first.

To correct a misspelled word:

1 Open a topic.

2 Right-click a misspelled word.

If you don't see any red underlined words, select **Tools > Spell Check While Typing**.

3 Do one of the following:

- Select an alternative spelling.
- Select **Ignore All** to ignore the spelling suggestion.
- Select **Add to Dictionary** to add the word to the dictionary so that future occurrences are not flagged as misspellings.

Class project notes

Open the **Rio** topic in the South America folder.

Right-click **populus** in the first paragraph.

Select **populous**.

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Spell Checking Your Project

You can spell check the current topic, all open topics, all topics in the same folder as the current one, or all topics in the project. For each unknown or misspelled word, you can select an alternative spelling, ignore the spelling warning, and add the word to the dictionary so that future occurrences are not flagged as possible misspellings.

In our project, we will find several words that are not part of the standard dictionary (such as non-English words).

do not copy

To spell check a project:

1 Select **Tools** > **Spell Check Window**.
—OR—
Press **F7**.

The Spell Check window appears.

2 Select what you want to **Spell Check**:

- **Current document** — Flare checks the spelling in the current topic.
- **Documents in same folder** — Flare checks the spelling in all topics in the same folder as the current topic.
- **Content folder** — Flare checks the spelling in all of the files in the Content Explorer.
- **Pick a Folder** — Flare checks the spelling in files in a selected folder.
- **Whole project** — Flare checks the spelling in every file in the project.

3 When Flare finds a questionable word, a list of suggested spellings is displayed at the bottom of the Spell Check window.

Class project notes

Select **Whole project**.

4 To change the spelling, select a suggestion and click **Change**. If you are spell checking more than the current topic, you can click **Change All Files** to change the spelling in all of the files.

If you want to keep the word as it is, click one of the following buttons:

- **Skip** — Flare ignores the spelling of the word and moves to the next misspelled word.
- **Add to Dictionary** — Flare adds the word to the project or global dictionary and moves to the next misspelled word.
- **Ignore** — Flare ignores the spelling of the word in this file.
- **Ignore All** — Flare ignores the spelling of the word in every file.

Closing All Windows

If you have too many windows open in the editing pane, you can close them using the **Close All Documents** or **Close All Documents Except This One** command.

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Learning More

Flare Help

The Flare help contains numerous useful topics about adding content:

Step 2: Adding Content and Features

- Topics
- Images
- Multimedia
- Tables

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Best practices for organizing content
- Using templates
- Changing XML Editor settings
- Renaming topics
- Advanced options for bulleted and numbered lists
- Automatically formatting code snippets

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do not copy

Importing Content

What You Will Learn

In this module, you will learn how to import content into Flare.

do not copy

About Importing

Importing content is a quick way to add text and images to your project. Flare can import .htm, .html, .xhtm, .xml, or .xhtml files, .dita files, .md files, Excel worksheets, Word documents, and FrameMaker documents. Flare converts imported files to .xhtml files.

After you import content into Flare, you usually modify it in Flare rather than in the original document. However, you can also modify files in another HTML/XML editor, Excel, Word, or FrameMaker and reimport it.

TIP Any images used in the imported file are also imported and placed in the Resources\Images folder in the Content Explorer.

do not copy

Importing a Word Document

Importing a Word document is a good way to add content from subject-matter experts. When you import a Word document, you can split it into multiple topics based on the heading styles used in the document. The document's formatting is also converted, along with any index entries, hyperlinks, and cross references.

NOTE Flare requires Microsoft Word 2007 or later to import .docx Word documents.

Re-importing a Word Document

Flare stores your import settings in a MS Word Import file. You can use your import settings to re-import the Word document or to import similar Word documents. If you want to continue editing your content in Word rather than in Flare, you can have Flare automatically re-import the Word document(s) when you build a target.

MS Word import files are stored in the Imports folder in the Project Organizer. Word documents are imported to the Content Explorer into a folder matching the name of the MS Word Import file.

The re-import feature works well for policies and procedures guides that are written by multiple people. Content owners can write their content in Word, save it to a server, and notify the P&P author about the change. The P&P author can then re-import the document(s) into the policies and procedures Flare project or configure their import file to automatically re-import the file(s) when they build a target.

> TIP If you plan to use the import feature in Flare, you should create a template in Word and teach your content providers to use it consistently to avoid reformatting the imported content after it is in Flare.

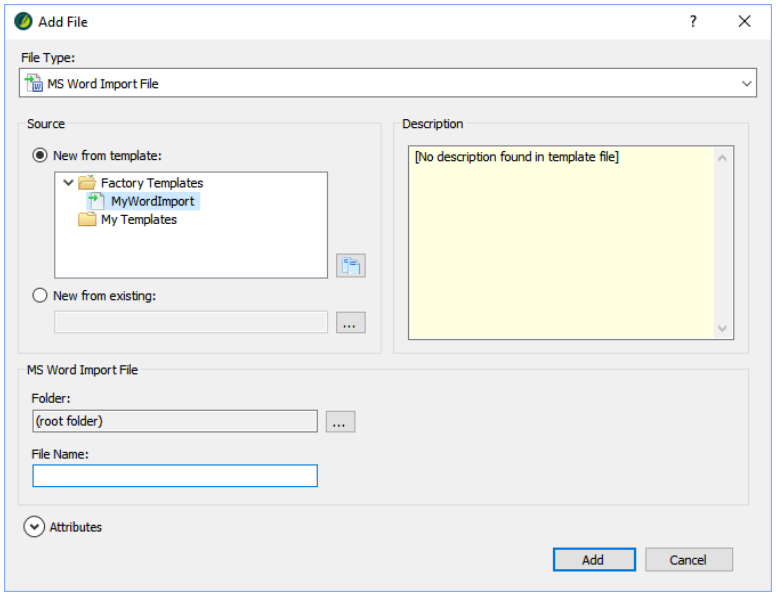
Let's import a Microsoft Word document. First, we will create a new MS Word Import file. Then, we'll import the Word file into Flare.

do not copy

To import a Word document:

1 Select **File** > **New**.

The Add File dialog box appears.



2 In the **File Type** section, select **MS Word Import File**.

3 Select a **Source**.

4 Type a **File Name**.

5 Click **Add**.

The Import Editor appears.

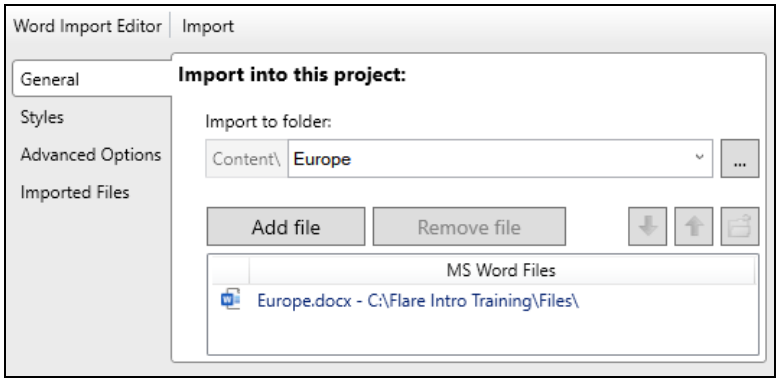
Class project notes

Select **New from template** and select the **MyWordImport** template.

Type **Europe**.

do not copy

6 Click the **General** tab.



7 In the **Import to folder** textbox, type or select a folder for the imported topics.

8 Click **Add File**.

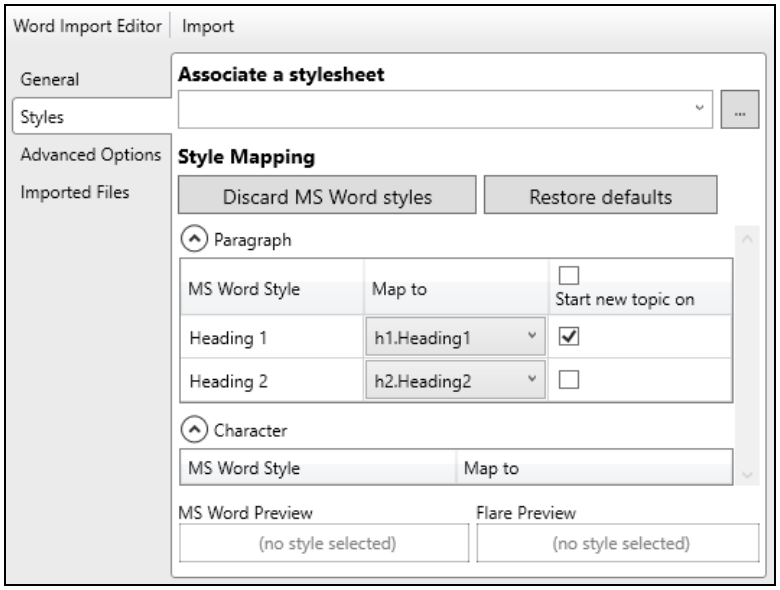
The Open dialog box appears.

9 Select a Word document and click **Open**.

Select **c:\flare intro training\files\Europe.doc**.

10 Click the **Styles** tab.

do not copy



11	If you want to create new topics based on a Word heading style, check the checkbox in the style's **Start new topic on** column.	Check the **Start new topic o**n checkbox for the **Heading 1** style.
12	Click the **Advanced Options** tab.	
13	If you want to create a new stylesheet based on the formatting in the imported document(s), select **Create new stylesheet**.	Select **Create new stylesheet**.
14	Select how you want to import inline formatting.	Select **Keep inline formatting**.
15	If you want to convert the first row in each table to a header row (and format it, if needed), select **Set first row of each table as header row**.	Enable the **Set first row of each table as header row**.

do not copy

16 Select how you want to import table styles.

Select **Convert table styles to Flare table styles**.

17 Select whether you want to preserve or ignore page breaks.

Select **Ignore page breaks**.

18 Select **Link Generated Files to Source Files** if you want to modify the imported Word document(s) in Word rather than in Flare.

Do not select the link option.

19 Select **Auto-reimport before 'Generate Output'** if you want to automatically re-import the Word document(s) when you build a target.

Do not select the auto-reimport option.

20 Click **Import** in the Import Editor toolbar.

The Accept Imported Documents dialog box appears.

21 When prompted to save the changes to the import file, click **Yes**.

22 Review the converted document and click **Accept**.

The Word document is converted to XHTML and imported into your project.

do not copy

Learning More

Flare Help

The Flare help contains numerous useful topics about importing content:

Step 1: Starting Projects > Import > Importing Other Applications and Files

- Converting Author-it Files
- Importing Confluence
- Importing Excel
- Importing FrameMaker
- Importing HTML
- Importing Word

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Best practices for importing files
- Advanced options for importing files
- Sharing files between Flare projects
- Importing FrameMaker files
- Importing external resources
- Importing files from SharePoint
- Importing RoboHelp and Doc-to-Help projects

do not copy

Linking Content

What You Will Learn

In this module, you will learn how to:

- Create a TOC book and page
- Re-arrange the items in a table of contents
- Create a cross reference
- Create a hyperlink
- Create a drop-down link

do not copy

About Links

You can organize your topics using a table of contents (TOC). Within topics, you can add cross references, hyperlinks and "show/hide" links such as drop-downs.

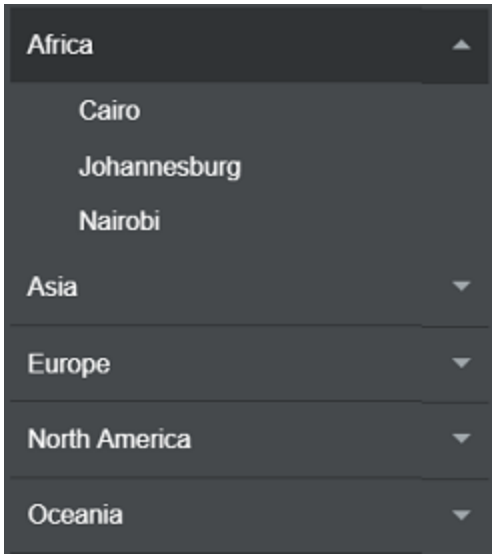
Table of Contents (TOC)

The TOC provides a structured list of links to topics or, if needed, documents or websites. In an online target, it becomes a menu that can be positioned at the top or on the side of the screen. In a print target, it appears as a typical table of contents like the one at the beginning of this guide.

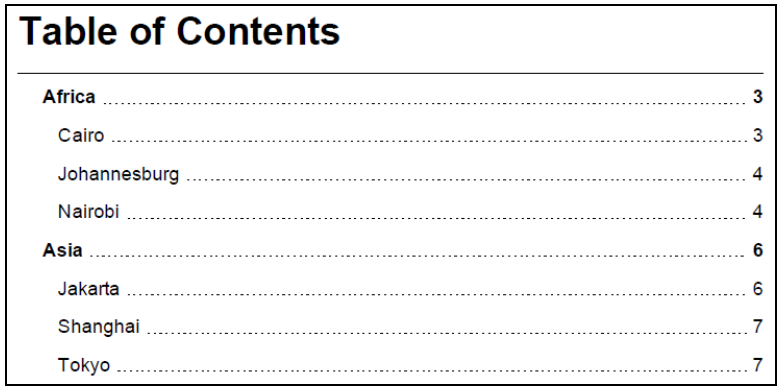
d o n o t c o p y

TOC as left-to-right menu in an HTML5 "Top Nav" target

TOC as top-to-bottom menu in an HTML5 "Side Nav" target



TOC in a print target



Cross References & Hyperlinks

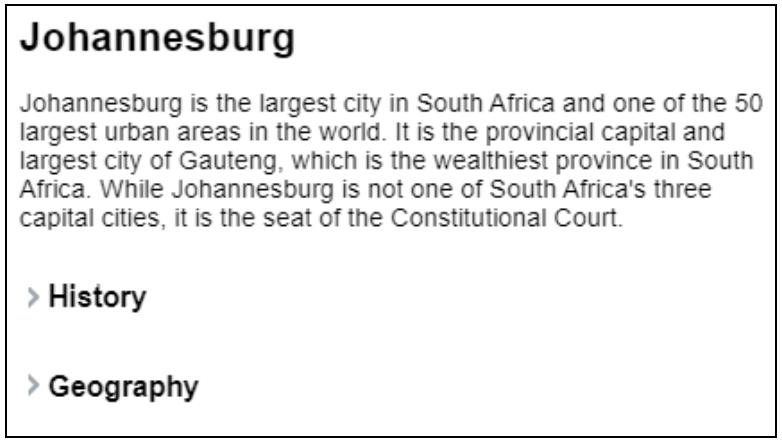
Cross references are used to link to other topics, and hyperlinks are used to link to other types of documents (such a PDFs) and websites.

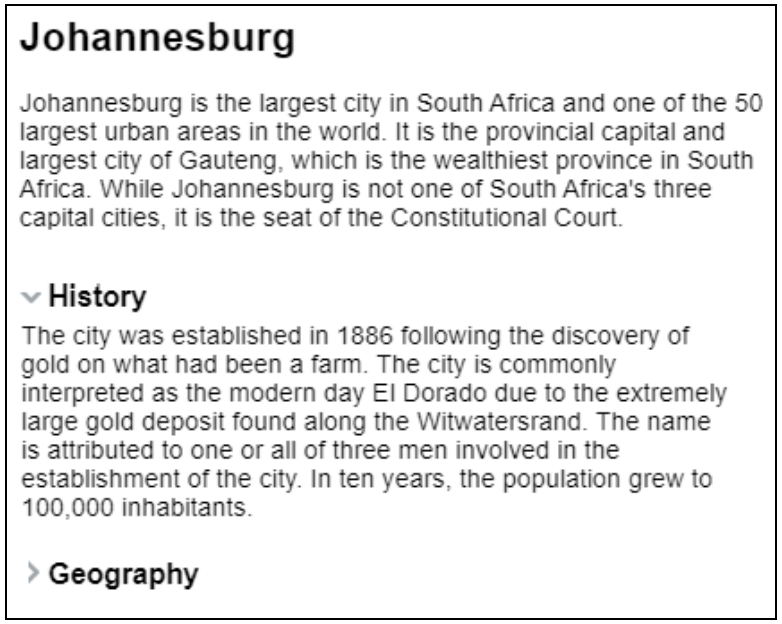
You can setup cross references to use different formatting in print targets or even to include page numbers. For example, a cross reference might be formatted as "Overview " (underlined blue text) in online targets and "See *Overview* on page 11" in print targets (italicized black text with a page number).

Drop-down Links

Drop-down links can be used to show and hide content when the user clicks a link. In the following example, the topic's introduction is initially hidden behind a drop-down link labeled “Overview" (left screen shot). Clicking the Overview link displays the drop-down text (right screen shot).

do not copy





do not copy

Creating a TOC Book or Page

TOC books are used to group topics, like chapters in a book. TOC pages normally link to topics. However, TOC pages and books can link to:

- Topics
- Files
- URLs
- Browse sequences
- Other TOCs (for merging TOCs)
- Other Flare projects (for merging projects)

Let’s create a TOC book and link it to a topic.

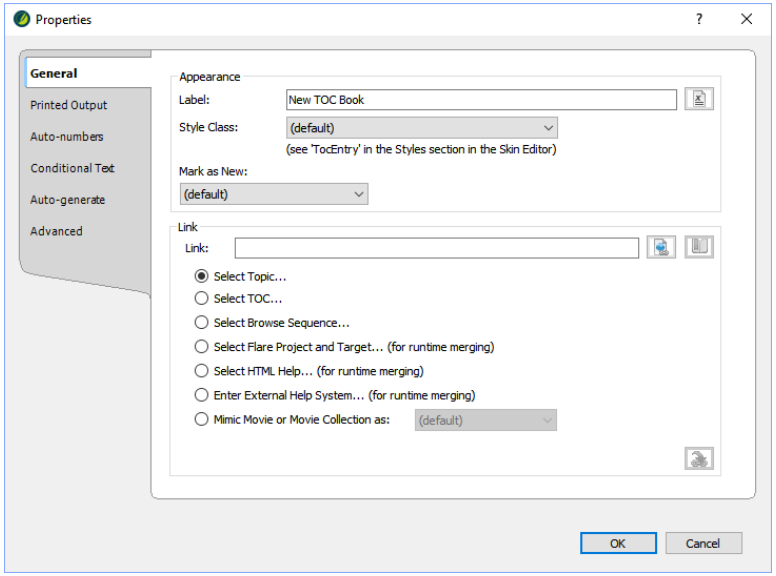
To create a TOC book:

1 Open a TOC.

2 Click in the toolbar.
—OR—
Press **Ctrl+F8**.

A new book appears in the TOC Editor.

3 Right-click the new TOC book and select **Properties**.



4 Type a **Label** for the book.
—OR—
Insert a variable:

- Click .

Class project notes

Open the **TOC** TOC.

Insert the **LinkedHeader** variable:

- Click .
- Select the **System** variable set.
- Select the **LinkedHeader** variable.

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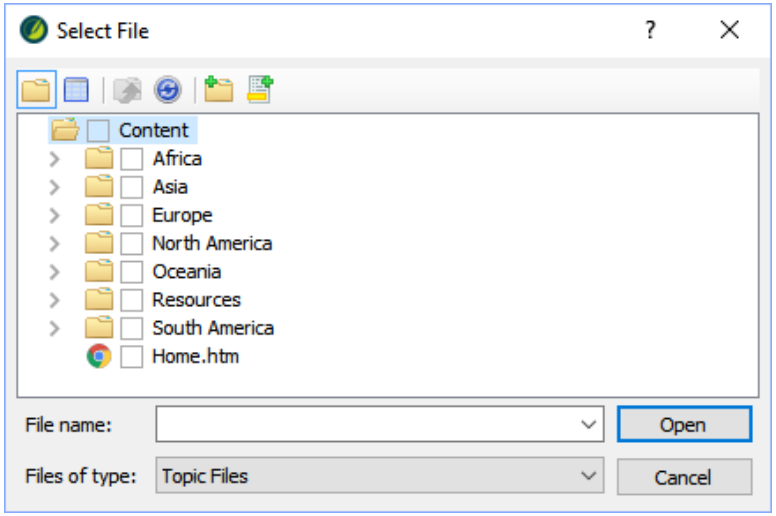
- Select the **System** variable set.
- Select the **LinkedHeader**, **LinkedFile**, or **LinkedTitle** variable.
- Click **OK**.

5 Click **Select Link**.

The Select File dialog box appears.



6 Select a topic.

Select **South America** in the South America folder.

7 If necessary, move the book to a new location in the TOC.

You can drag-and-drop the TOC book or use the arrows in the TOC Editor toolbar.

Move the **South America** book to the bottom of the TOC.

8 Select **Save All**.

- Click **OK**.

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Using Drag-and-Drop to Add Books and Pages to a TOC

You can also create TOC books and pages by dragging and dropping folders or topics from the Content Explorer into the TOC. If you drag a folder from the Content Explorer to a TOC, Flare will create a TOC book for the folder and TOC pages for each topic in the book.

Let's drag-and-drop the South American city topics into our "South America" TOC book.

To use drag-and-drop to add books and pages to a TOC:	Class project notes
1 Open a TOC.	Open the **TOC** TOC.
2 Open the Content Explorer.	
3 Drag a folder or topic to the TOC.	Drag the topics in the South America folder into the South America TOC book and the San Franciso topic into the North America book.
4 Rename or delete any books or pages as needed.	Delete the **New Entry** TOC page.

do not copy

Creating a Cross Reference

Cross references are used to link to other topics in a project.

Let's create a cross reference.

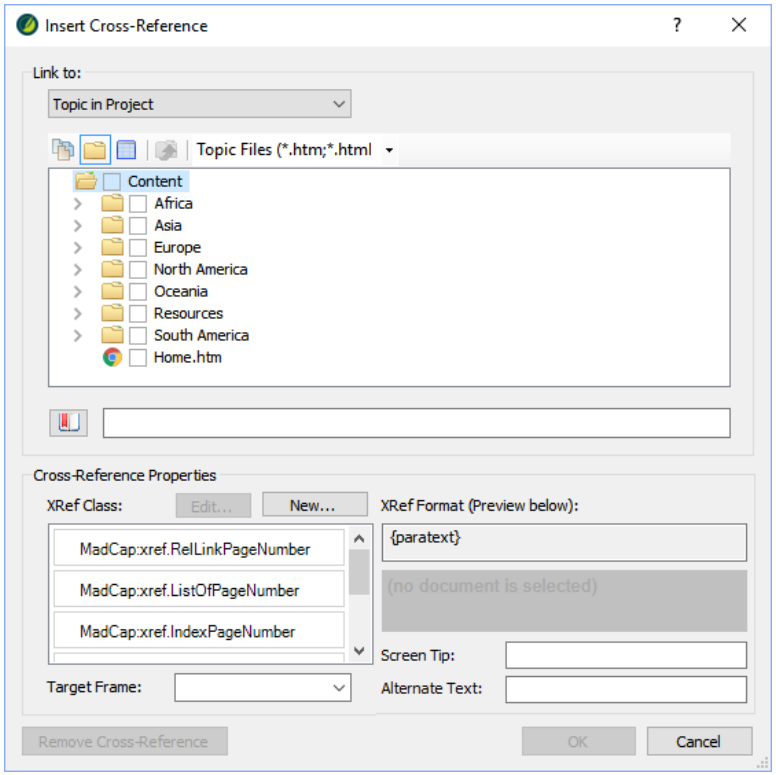
To create a cross reference to a topic:	Class project notes
1 Open the topic that will contain the cross reference.	Open the **North America** topic in the North America folder.

2 Position your cursor where you want to add the cross reference.

Add a new bulleted list item after New York and position the cursor on the line.

3 Click in the XML Editor toolbar.
—OR—
Select **Insert** > **Cross Reference**.
—OR—
Press **Ctrl**+**Shift**+**R**.

The Insert Cross Reference dialog box appears.



4 In the **Link to** section, select the type of link you want to create.

Select **Topic in Project**.

do not copy

5 Select a topic.

Select the **San Francisco** topic.

6 In the **Alternative Text** field, type a description of the link.

Alternative text is recommended by accessibility guidelines such as the US Government's Section 508 and the W3C's Web Content Accessibility Guidelines (WCAG).

Type **Link to the San Francisco topic**.

7 Click **OK**.

The cross reference is added to the topic.

do not copy

Creating a Hyperlink

Let's create a hyperlink to a website.

To create a hyperlink to a website:

Class project notes

1 Open the topic that will contain the link.

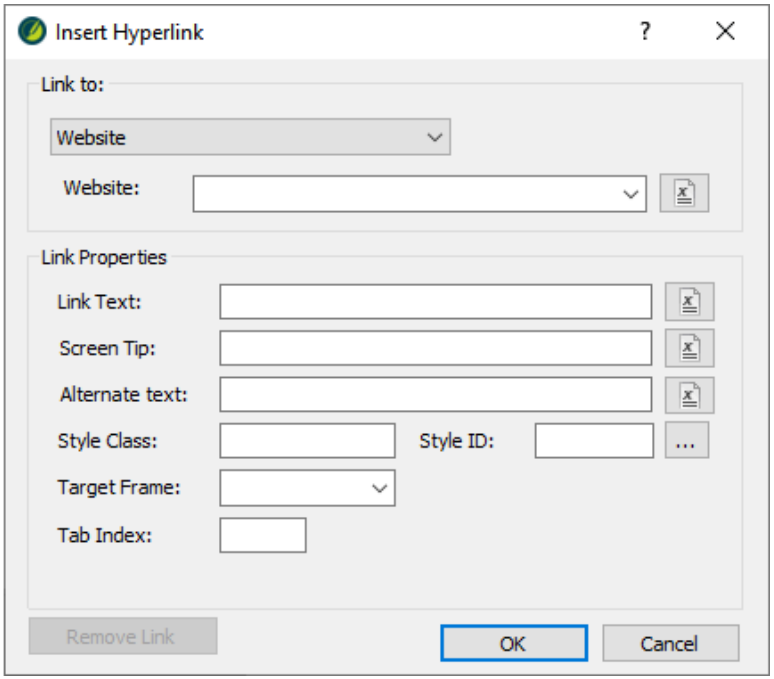
Open the **Sydney** topic in the Oceania folder.

2 Select the text that you want to use as the link.

Select **us.sydney.com**.

3 Click in the XML Editor toolbar.
—OR—
Select **Insert** > **Hyperlink**.
—OR—
Press **Ctrl**+**K**.

The Insert Hyperlink dialog box appears.



4 In the **Link to** section, select **Website**.

5 Type a website address.

Type **http://us.sydney.com**.

6 In the **Alternative Text** field, type a description of the link.

Alternative text is recommended by the US Government's Section 508 and the W3C's Web Content Accessibility Guidelines (WCAG).

Type **Link to us.sydney.com**.

7 If needed, select a **Target Frame**.

Links to websites often appear in a new window.

Select **New Window/Tab**.

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8 Click **OK**.

The hyperlink is added to the topic.

Creating a Drop-down Link

Let's add a drop-down link to a topic.

To create a drop-down link:

1 Open the topic that will contain the drop-down link.

2 Type and select the drop-down link and drop-down text.

3 Select **Insert** > **Drop-Down Text**.

The drop-down icon appears to the left of the drop-down link.

Class project notes

Open the **melbourne** topic in the Oceania folder.

Select the following:

Athletes

- Ron Barassi
- Kyrie Irving
- Anthony Koutoufides
- Mark Philippoussis

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Learning More

The Flare help contains numerous useful topics about linking content:

Step 2: Adding Content and Features

- Tables of Contents
- Links > Cross-References
- Links > Drop-Downs
- Links > Text Hyperlinks

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Using multiple TOCs in a project
- Finding topics that are not in the TOC
- Locating a topic in the Content Explorer from the TOC
- Creating an index
- Creating search synonyms
- Excluding topics from the search
- Using Google Search
- Using Elasticsearch
- Creating a glossary
- Automatically adding glossary definition popups
- Creating bookmark links

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- Creating a link to a PDF
- Finding and fixing broken links
- Testing web links
- Creating expanding links
- Creating toggler links

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Designing Content

What You Will Learn

In this module, you will learn how to:

- Apply a stylesheet to all topics
- Apply a style to content
- Assign a table stylesheet to a table
- Add a header and footer to a page layout
- Add content to a template page
- Change a skin
- Apply a template page and skin to an online target
- Apply a page layout to a print target

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About Design

In this module, we will discuss how to design online and print targets using styles, table styles, page layouts, template pages, and skins.

Styles

Styles are used to format content. For example, styles can specify the font size and color, background color, borders, and space above, below, or to the right or left of content.Styles are stored together in a stylesheet.

You can also use Inline formatting (or, "style overrides") to format content. Inline formatting is any formatting you add by selecting a block of content and manually formatting it, usually by clicking an icon on the formatting toolbar. An example of inline formatting is if you select a topic's heading and make it 14pt Verdana Bold.

You should avoid using inline formatting. It's harder to keep consistent and much harder to update than using styles.

Table Stylesheets

Table stylesheets are used to format tables. Table stylesheets are simply small stylesheets that only contain table-specific formatting.

Page Layouts

Page layouts are used to specify the page size and margins and to add headers and footers in print targets. You can create multiple page layouts as many page layouts as you need. For example, you can create an 8.5x11" page layout for user guides and a smaller page layout, such as 6x9", for quick reference guides.

Template Pages

Template pages are used to add content to some or (more likely) all of your topics when you build an online target. For example, you could use a template page to add a copyright statement to the bottom of every topic. You can also add built-in block of

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content (called "proxies") to your template page. For example, you can use a toolbar proxy to add buttons, such as a previous, next, and print button, to your topics.

Skins

Skins are used to design online targets. Flare has three HTML5 skin designs: "Top Nav," "Side Nav," and the older "Tripane" design. A skin can be used to specify/format:

- The logo
- The menu formatting (colors and sizes)
- The search bar's size, color, and border

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Applying a Stylesheet to All Topics

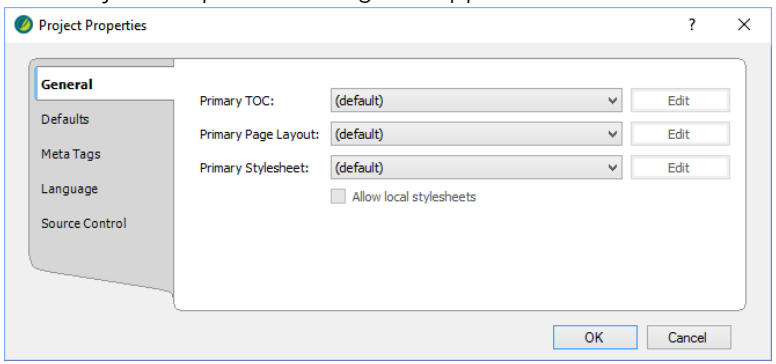
You can use a primary stylesheet to apply a stylesheet to all of your topics. The primary stylesheet will also be applied to any new or imported topics.

Let's apply the Styles stylesheet to all of our topics.

To apply a stylesheet to all topics:

1 Select **Project** > **Project Properties**.

The Project Properties dialog box appears.



2 Select the **Defaults** tab.

Class project notes

3 Select a **Primary Stylesheet**.

Select **Styles**.

4 If you want to be able to apply a different stylesheet to some topics in your project, select Allow local stylesheets.

Do not select Allow local stylesheets.

5 Click **OK**.

The topics are associated with the stylesheet. New and imported topics will also be automatically associated with the primary stylesheet.

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Applying a Style to Content

Let's open a topic and apply a style to a paragraph.

To apply a style:

Class project notes

1 Open a topic.

Open the **New York** topic in the North America folder.

2 Select or click inside the content to which you want to apply the style.

Click inside the "Boroughs" paragraph.

3 Select **Home** > **Style Window**.
—OR—
Press **F12**.

The Styles window appears.

4 Click a style in the list.

The style is applied to the selected content.

Click **h2**.

TIP You can pin your most commonly-used styles to the top of the list. Just hover over the style's name and click the icon.

Applying a Table Stylesheet to a Table

Let's apply our table stylesheet to a table.

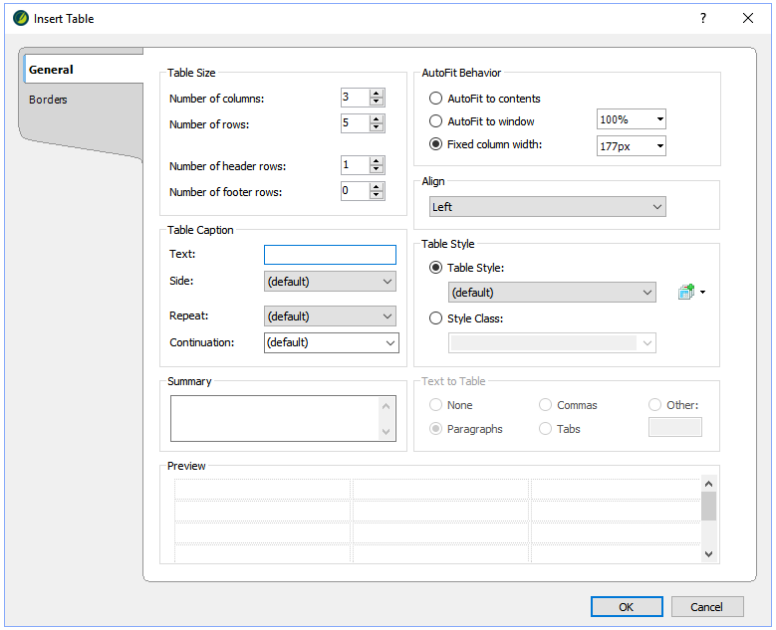
To apply a table stylesheet to a table:

1 Open the topic where you want to apply the table stylesheet.

2 Click inside the table.

3 Select **Table** > **Table Properties**.

The Table Properties dialog box appears.



Class project notes

Open the **Toronto** topic.

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4 Select a **Table Style** and click **OK**.

Select **TableStyle**.

TIP If your table's formatting does not change when you assign a table style sheet, it might include inline formatting. To remove inline formatting from a table, right-click inside the table and select **Table** > **Reset Local Cell Formatting**.

Adding a Footer to a Page Layout

Page layouts are used to format print targets. For example, a page layout specifies the page size and margins and the content in the header and footer.

Let's add the page number and page count variables to the page layout's footer.

To add content to a page layout's footer:

Class project notes

1 Open a page layout.

Open the **PageLayout** page layout.

2 Right-click the **footer** frame and select **Edit Text**.

3 Select whether you want to use a template.

Click **Yes**.

4 Select a template.

Select **Page n of N.flsnp**.

5 Click **OK**.

The Frame Contents pane appears.

6 Modify the footer as needed.

Click to center the footer.

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7 Save and close the footer.

Selecting a Page Layout in a Target

You can set a print target to use any page layout.

Let's set our PDF target to use our PageLayout page layout. Then, we can build and view our target.

To select a page layout in a target:

1 On the Project Organizer, open the Targets folder and double-click a target.

2 Select the **General** tab.

3 Select a **Primary Page Layout**.

4 Click **Save All**.

5 Click **Build**.

6 When prompted, click **Yes** to view the output.

Class project notes

Double click the **PDF** target.

Select the **PageLayout** page layout.

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Adding Content to a Template Page

In a template page, the "topic body" proxy represents the content in your topics. If you add content above the topic body proxy, the content will display above the topic's content in the online output. If you add content below the topic body proxy in the template page, the content will display below the topic's content in the online output.

TIP To see the proxies in the XML Editor, you need to have Show Markers selected.

Let's type add a copyright statement to the bottom of the template page.

To add content to a template page:

1. Open a template page.
2. Position your cursor where you want to add content.
3. Type or insert your content.

Class project notes

Open the **TemplatePage** template page.

Click on the blank line at the bottom of the template page.

Type the following:

Copyright 2021, MadTravel, Inc.

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Selecting a Template Page in a Target

You can set an online target to use any template page. If you do not select a template page, the target will not use one.

Let's set our HTML5 target to use our template page. Then, we can build and view our HTML5 target.

To select a template page in a target:

1. On the Project Organizer, open the Targets folder and double-click a target.
2. Select the **Advanced** tab.
3. Select a **Template Page**.
4. Click **Save All**.

Class project notes

Double click the **HTML5** target.

Select the **TemplatePage** template page.

5 Click **Build**.

6 When prompted, click **Yes** to view the output.

Look at the header and footer of your topics.

Changing a Skin

Each skin design type (top nav, side nav, and tripane) has slightly different settings that you can change, but they are all setup the same way.

d o n o t c o p y

"Top Nav" skin design

"Side Nav" skin design

Let's change our TopNav skin's logo.

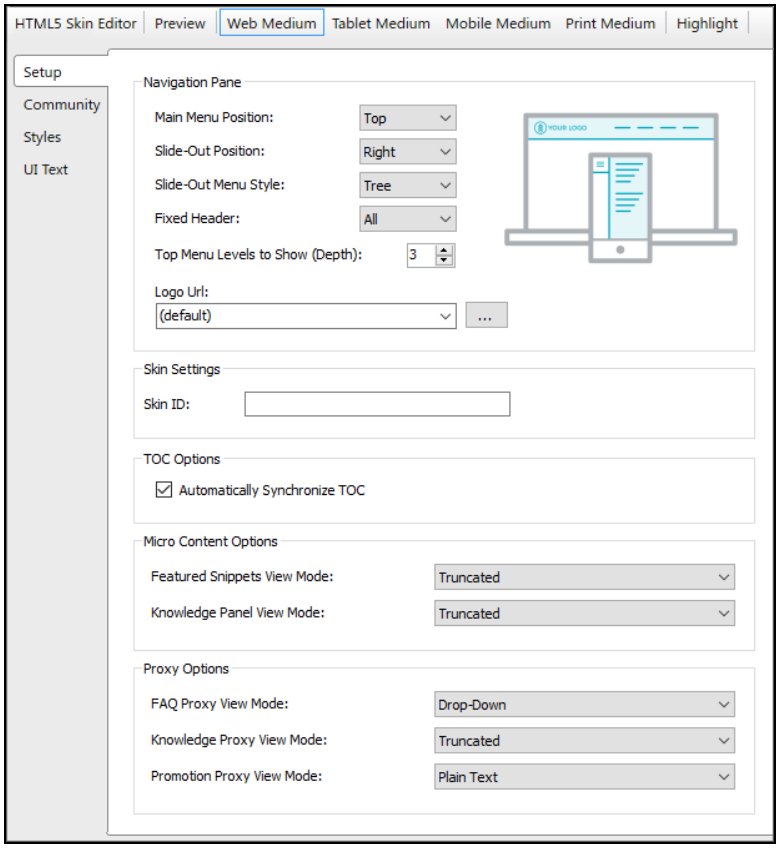
To setup a skin:

1 Open a skin.

The Skin Editor appears.

Class project notes

Open the **TopNav** skin. Skins are stored in the Project Organizer in the Skins folder.



2 Select a **Pane Position**.

Select **Right**.

3 If you want to use Pulse in your target, select the **Community** tab and set the options.

4 Select the **Styles** tab.

The Styles tab appears.

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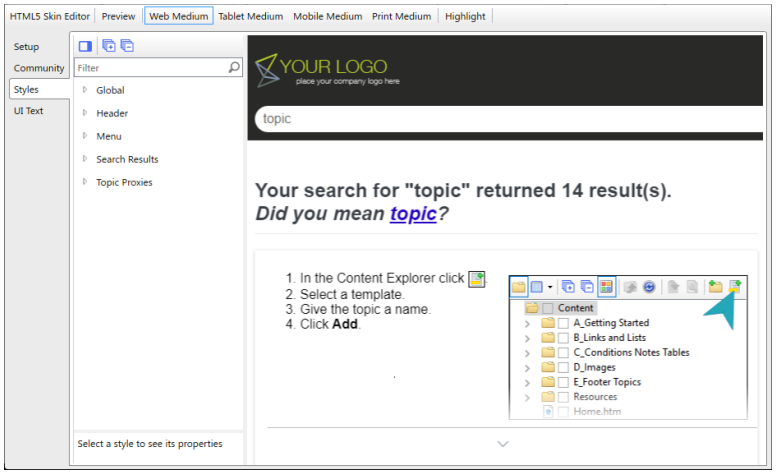

5 For any item you want to change:

- Select a style group.
- Select a property.
- Select a new value.

- Open the **Header** style group.
- Open the **Logo** style group.
- Open the **Background** style group.
- For **Image**, click .
- Locate **c:\flare intro training\files\logo.png**.
- Click **Open.**

Selecting a Skin in a Target

You can set an online target to use any skin. Let's set our HTML5 target to use the TopNav skin.

To apply a skin to a target:

1 Select the **Skin** tab.

2 Select a **Skin**.

Class project notes

Select the **TopNav** skin.

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Learning More

Flare Help

The Flare help contains numerous useful topics about design:

Step 3: Designing

- Styles and Stylesheets
- Page Layouts
- Template Pages
- Skins

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Creating style classes
- Modifying styles
- Modifying table stylesheets
- Advanced page layout design
- Using template page proxies
- Setting page sizes and margins
- TopNav, SideNav, and Tripane skin design options

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Single Sourcing

What You Will Learn

In this module, you will learn how to:

- Create a variable
- Insert a variable
- Create a snippet
- Insert a snippet
- Create a condition tag
- Apply a condition tag to content
- Apply a condition tag to a file or folder

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About Single Sourcing

“Single sourcing” is a content development technique where content is stored in one location and reused rather than duplicated and maintained in multiple locations. In Flare, we can build multiple outputs ("called targets") that include or exclude any combination of our topics in any order. We can also reuse content, such as a note, table, or procedure, in multiple topics.

Variables

Variables are pre-set terms that you can use over and over. For example, you can create a variable for a phone number and use the phone number variable in multiple topics. If you need to change the phone number, you only need to change the variable and it's updated automatically wherever the variable has been used.

Snippets

Snippets are similar to variables, but they can include any type of content. For example, a snippet might contain a table that you need to include in multiple topics.

Condition Tags

Condition tags are used to exclude content when you build a target. You can apply a condition tag to anything in Flare, from a single character to a paragraph, link, image, video, variable, or snippet, a topic, or any other file or folder in your project. After you apply condition tags to your content, you can setup your targets to include or exclude the tagged content.

Here are some examples of how you could use condition tags in a Flare project:

- If you build online and print targets, there may be some online-specific phrases like "Click here for more info" that don’t make sense in print. Or, you might have print-specific content that you don't need in an online target. For example, some Flare users don't include screenshots in their online targets. With condition tags,

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you can tag online- and print-specific content and exclude it when needed.

- If you are documenting a modular application and your customers can buy different configurations, you can use condition tags to exclude content about the modules they didn't purchase.

Creating a Variable

If you use the same text in multiple topics, you can use a variable rather than typing the text each time. That way, you can easily update it if the text changes.

Let's create a variable for our company name.

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To create a variable:	Class project notes
1 Open the Project Organizer.	
2 Open the **Variables** folder.	
3 Double-click a variable set. The Variable Set Editor window appears.	Double-click the **Variables** variable set.
4 Click in the Variable Set Editor toolbar.	
5 Type a name for the variable.	Type **CompanyName**.
6 Type a definition for the variable.	Type **MadTravel**.

Inserting a Variable

Now that we've created our variable, we can use it in our project. Variables can be used almost anywhere in Flare, including in topics, snippets, template pages, and page layouts.

Let's insert the CompanyName variable into a topic.

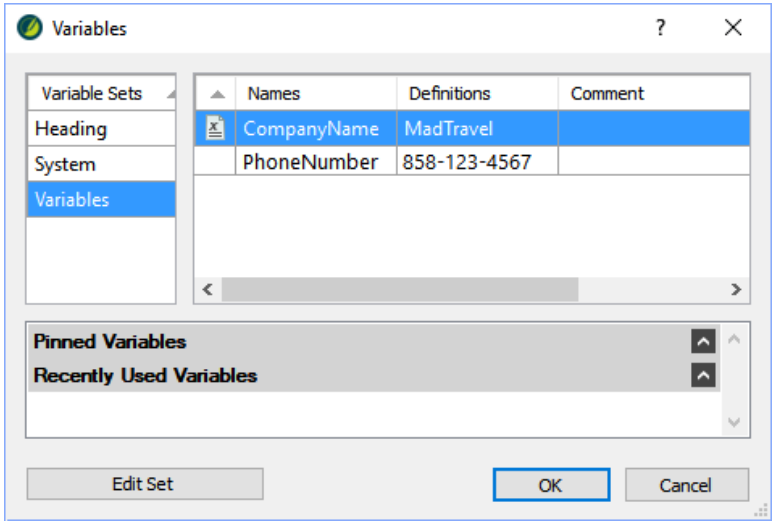
To insert a variable into a topic:

1 Open a topic.

2 Place your cursor where you want to add the variable.

3 Select **Insert** > **Variable**.

The Variables dialog box appears.



4 Select a variable set.

Class project notes

Open the **Home** topic.

Delete MadTravel.

Select **Variables**.

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5 Select a variable.

Select **CompanyName**.

> TIP You can pin your most commonly-used variables to the top of the list. Just hover over the variables' name in the Recently Used Variables list and click 📌

6 Click **OK**.

The variable appears in the topic.

> TIP If you enable Auto Suggestion, Flare will prompt you to insert a variable when you start typing its definition. To enable Auto Suggestion, select **Tools** > **Options** and select the **Auto Suggestion** tab.

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Creating a Snippet

A snippet can contain as much content as you need, from one paragraph to a large table with images.

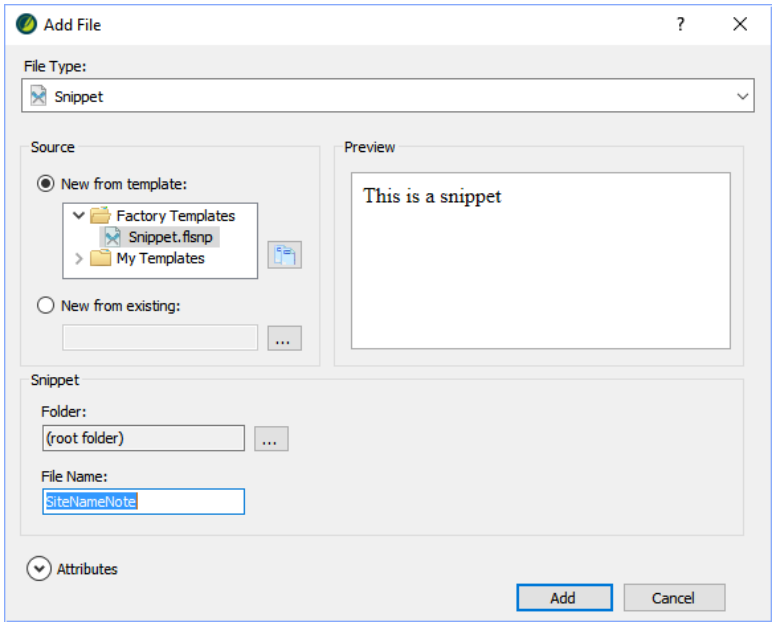
Let's create a snippet of the most populous cities in the Americas.

To create a snippet:

1 Select **File** > **New**.

The Add File dialog appears.

Class project notes



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2 In the **File Type** section, select **Snippet**.

3 Select a **Source**. Select **Snippet.flsnp**.

4 Select a **Folder**. Select **Resources/Snippets**.

5 In the **File Name** field, delete the name “NewTopic” and type a new name for the topic. Type **MostPopulousCities**.

6 Click **Add**.
The snippet opens as a new tab in the XML Editor.

7 Add content to the snippet.

Type the following:

The most populous cities in the Americas are:

1. São Paulo
2. Lima
3. Mexico City
4. New York
5. Bogotá

8 Save the snippet.

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Inserting a Snippet

Let's insert our snippet into a topic.

To insert a snippet into a topic:

1 Open a topic.

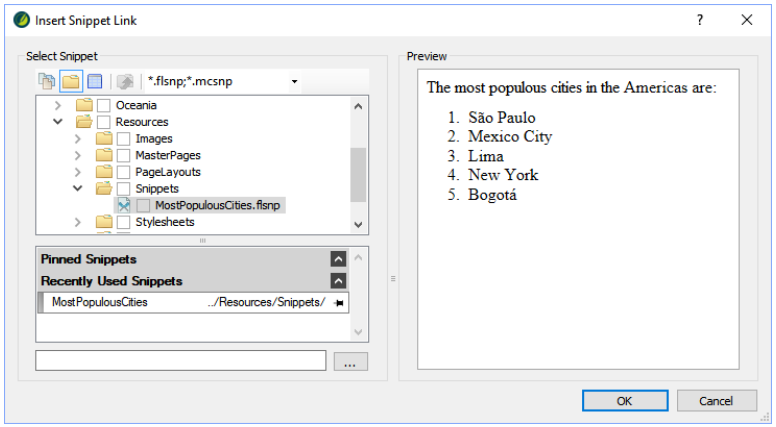
2 Position the cursor where you want to add the snippet.

3 Select **Insert** > **Snippet**.
The Insert Snippet Link dialog box appears.

Class project notes

Open the **Lima** topic in the South America folder.

Delete the list of most populous cities.



4 Select a snippet.

A preview of the snippet appears.

Select **MostPopulousCities**.

> TIP You can pin your most commonly-used snippets to the top of the list. Just hover over the snippet's name in the Recently Used Snippets list and click 📌.

5 Click **OK**.

The snippet is added to the topic.

> TIP If you enable Auto Suggestion, Flare will prompt you to insert a snippet when you start typing its content. To enable Auto Suggestion, select **File** > **Options** and select the **Auto Suggestion** tab.

Creating a Condition Tag

Let's create a condition tag for draft content. We can then exclude draft content when we build a target.

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To create a condition tag:	Class project notes
1 Open the **Conditional Text** folder in the Project Organizer.	
2 Double-click a condition tag set. The Condition TagSet Editor appears.	Open the **Conditions** condition tag set.
3 Click in the ConditionTagSet Editor toolbar. A new tag appears.	
4 Double-click the new tag's name.	
5 Type a new name for the tag and press **Enter**.	Type **Draft**.
6 Select a color.	Select dark red.
7 Click **Save**.	

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Applying a Condition Tag to a File or Folder

Let's apply the Draft condition tag to a topic.

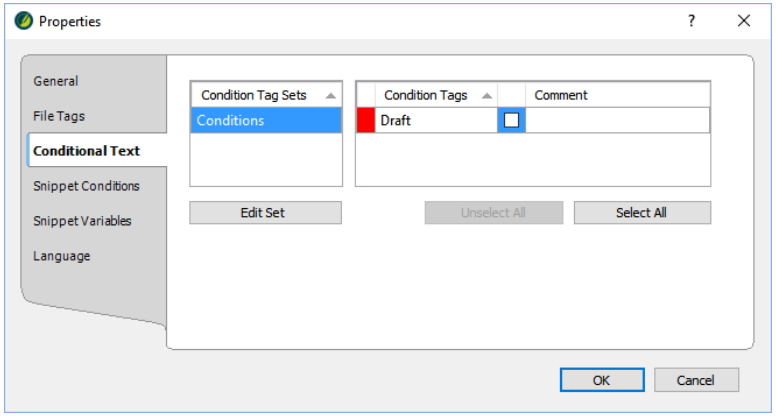
To apply a condition tag to a topic:	Class project notes
1 Open the Content Explorer.	
2 Select the file or folder to be tagged.	Select the **Tokyo** topic.

3 Click in the Content Explorer toolbar.

The Properties dialog box appears.

4 Select the **Conditional Text** tab.

The Conditional Text tab appears.



5 Select a condition tag set.

6 Select a tag's checkbox.

Select the **Draft** tag.

7 Click **OK**.

The tag is applied and the file or folder's box is filled with the tag's color.

NOTE If you don't see the condition tag's color, click the Hide/Show Conditional Indicators icon in the Content Explorer toolbar.

Applying a Condition Tag to Content

Let's apply the Draft tag to content inside a topic.

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To apply a condition tag to content:

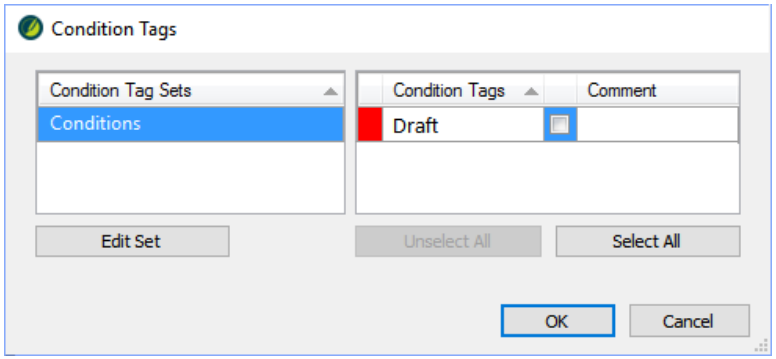
1 Open a topic.

2 Select the content to be tagged.

You can apply a tag to any content, including a character, word, paragraph, bookmark, or image.

3 Select **Home** > **Conditions**.

The Condition Tags dialog box appears.



4 Select a condition tag set.

5 Select a condition tag's checkbox.

6 Click **OK**.

The tag is applied. The tagged content is shaded using the tag's color.

NOTE If you don't see the condition tag's color, click the Hide/Show Conditional Indicators icon in the XML Editor toolbar.

Class project notes

Open the **Asia** topic in the Asia folder.

Select the **Draft** checkbox.

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Learning More

Flare Help

The Flare help contains numerous useful topics about single sourcing:

Step 2: Adding Content and Features

- Variables
- Snippets
- Conditions

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Creating variables with multiple definitions
- Applying styles to variables
- Creating a snippet from existing content
- Using auto-suggestion to insert variables and snippets
- Best practices for setting up and using condition tags
- Advanced options for excluding content and topics

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Topics Reviews and Targets

What You Will Learn

In this module, you will learn how to:

- Plan topic reviews using MadCap Central
- Plan topic reviews using MadCap Contributor
- Plan topic reviews using Word/PDF
- Setup an HTML5 target
- Build an HTML5 target
- View an HTML5 target
- Create a PDF target
- Setup a PDF target
- Build a PDF document
- View a PDF document

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MadCap Central Reviews

If your reviewers use Central, you can upload the topics to Central. Reviewers can then edit the topics and add annotations using Central's built-in topic review tool.

There are four main advantages for using Central for reviews:

- You can easily send one, multiple, or all topics for review
- Reviewers do not need to install any software (Central is cloud based)
- Multiple reviewers can "share" the review topics and see each others' changes and comments
- Reviewers add their changes and comments to copies of the source files, so it is easy to integrate their changes and comments

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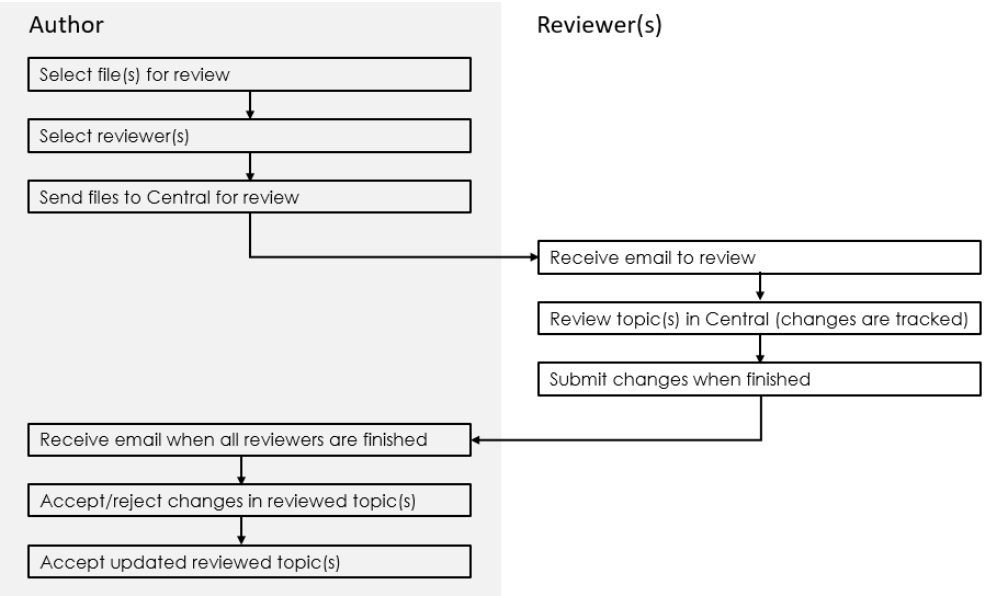
Central review workflow



MadCap Contributor Reviews

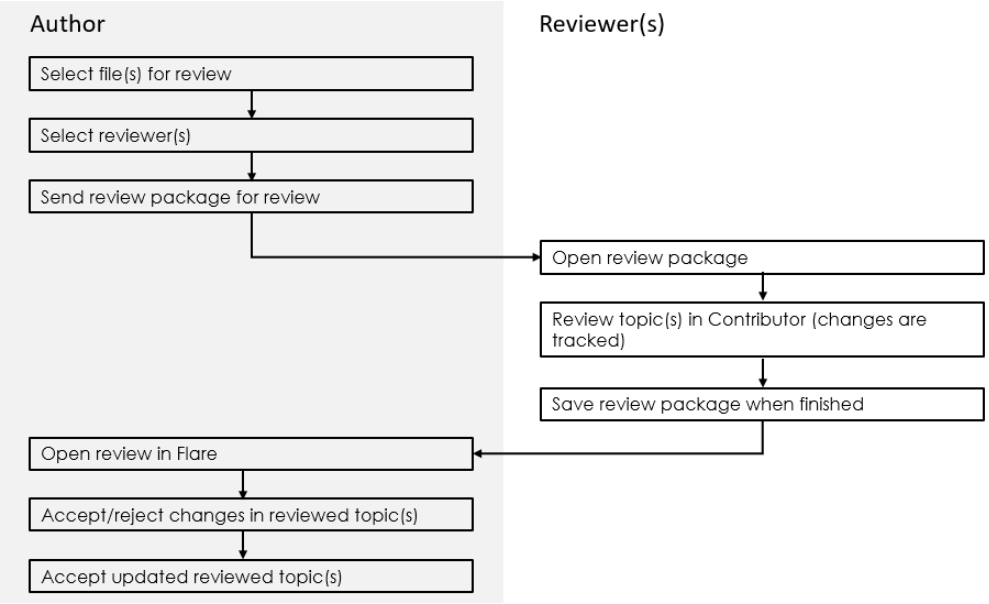
If your reviewers use Contributor, you can send them the review package or copy it to SharePoint or a network drive. Reviewers can then edit the topics and add annotations using Contributor.

There are two main advantages for using Contributor for reviews:

- You can easily send one, multiple, or all topics for review
- Reviewers add their changes and comments to copies of the source files, so it is easy to integrate their changes and comments

d o n o t c o p y

Contributor review workflow

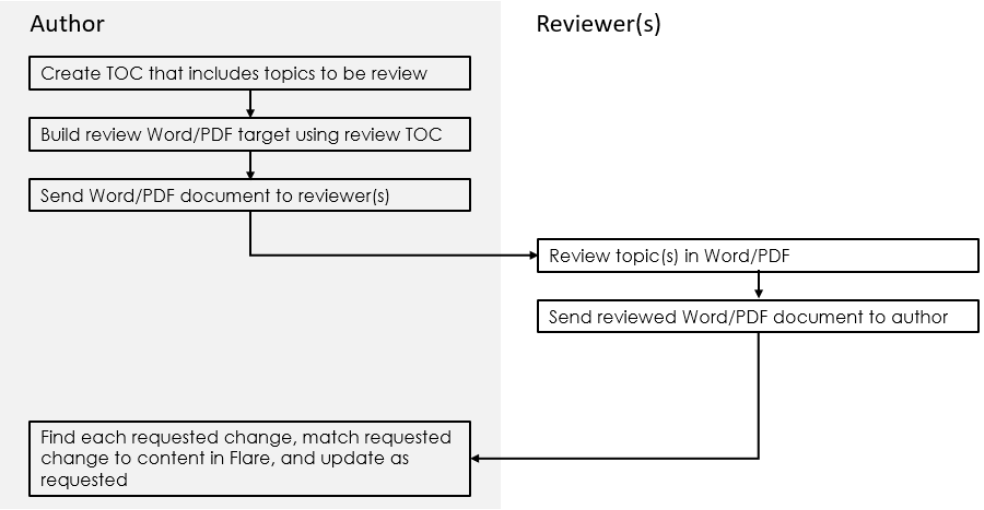


Word/PDF Reviews

If your reviewers want to use Word or PDF documents, you can send them a Word or PDF document or copy it to SharePoint or a network drive. Reviewers can then edit the topics and add comments/notes.

The biggest disadvantage to using Word/PDF documents for reviews is that finding and integrating the reviewers' changes/comments can be very time consuming.

Word/PDF review workflow



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About Targets

Flare produces eleven types of output:

- DITA
- Eclipse Help
- MadCap Clean XHTML
- MadCap HTML5
- MadCap WebHelp
- MadCap WebHelp Plus
- Microsoft HTML Help
- Adobe PDF
- EPUB
- Microsoft Word
- MOBI

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You can build any or all of these output types from the same project, and, as you learned in the last module, you can use condition tags to exclude content when you build a target.

In this class, we will focus on the two most popular output types: HTML5 and PDF.

HTML5

HTML5 is the recommended online target type. The HTML5 target type uses the HTML5 specification as developed by the Web Hypertext Application Technology Working Group (WHATWG) and the World Wide Web Consortium (W3C). Users can open an HTML5 target in any browser on any type of device, including phones, tablets, and computers.

PDF

PDF ("Portable Document Format") is an open standard format for electronic documents that was invented by Adobe. Although PDFs are often viewed online, PDF is considered a print-based format.

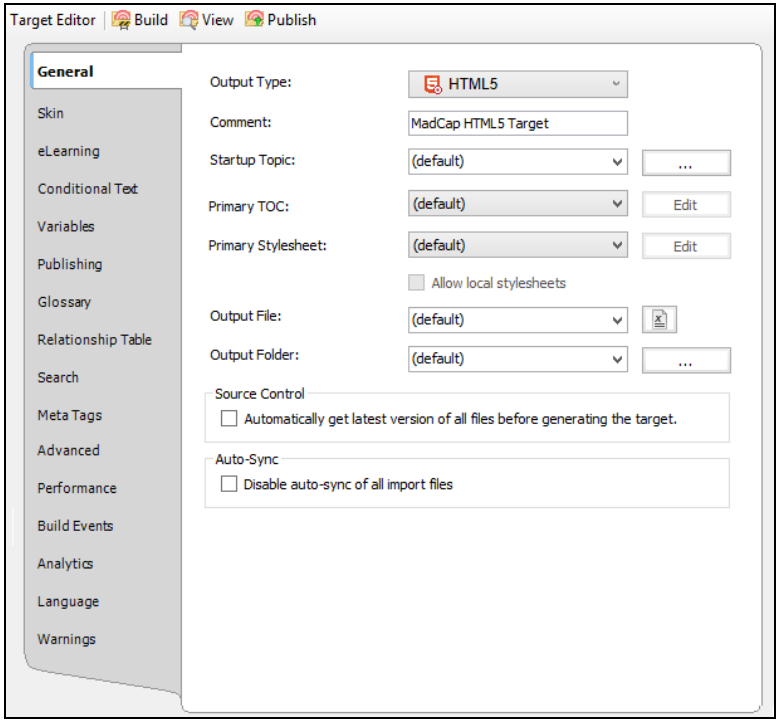
Setting Up an HTML5 Target

You can use the Target Editor to select a TOC, skin, and template page to use for an HTML5 target. You can also select the condition tags you want to exclude.

Let's make some changes to our HTML5 target.

To setup an HTML5 target:

1 Open an HTML5 target.



2 For **Startup Topic**, click ..., select a topic, and click **Open**.

The startup topic is the first topic the user will see when they open the HTML5 output.

Class project notes

Open **HTML5**.

Select **Home**.

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3 Select a **Primary TOC**.

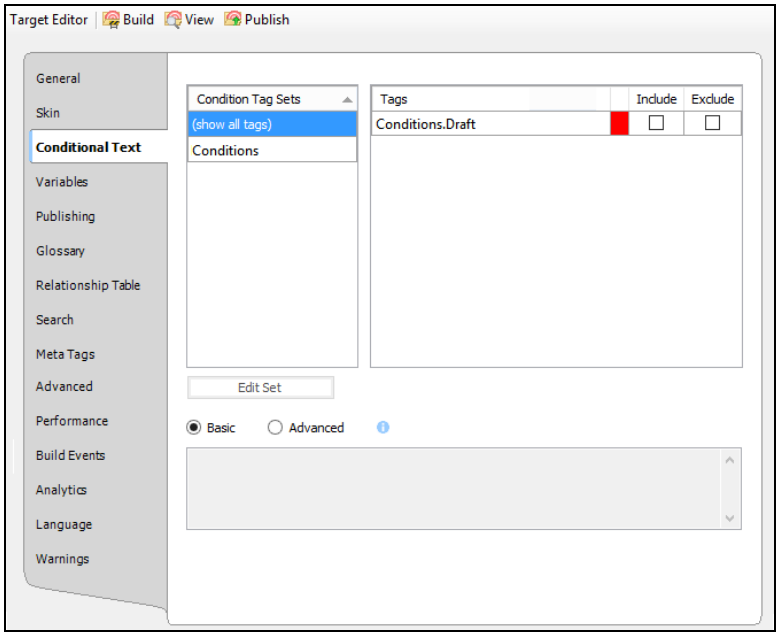
Select **TOC**.

4 Select the **Skin** tab.

5 Select a **Skin**.

Select **TopNav**.

6 Select the **Conditional Text** tab.



7 Select the condition tags that you would like to exclude.

By default, all content is included.

Exclude **Conditions.Draft**.

8 Select the **Advanced** tab.

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9 Select a **Template Page**.

10 Click **Save**.

Select **TemplatePage**.

Building an HTML5 Target

Let's build our HTML5 target and see how it looks.

To build an HTML5 target:

1 On the Project Organizer, right-click an HTML5 target.

2 Select **Build**.
If you made any changes to the target, Flare will prompt you to save the changes. Click **Yes**.

The Builds pane appears.

3 When the build is complete, double-click the target in the Build pane to view the output.

NOTE You can highlight a target in the Builds pane and click **View Output** to open it in a different browser.

Class project notes

Right-click the **HTML5** target.

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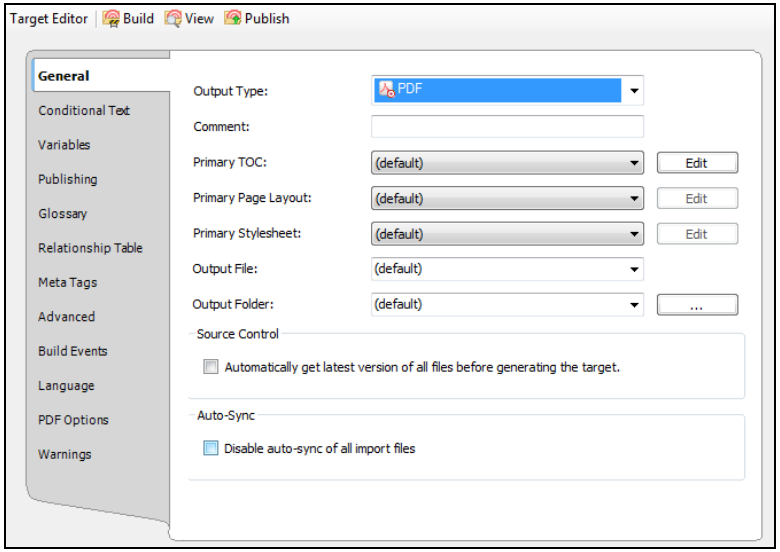
Setting Up a PDF Target

You can use the Target Editor to select a TOC and page layout to use for a PDF target. You can also select the condition tags you want to exclude.

Let's make some changes to our PDF target.

To setup a PDF target:

1 Open a target.



2 Select a **Primary TOC**.

3 Select a **Primary Page Layout**.

4 Type an **Output File** name.

5 Select the **Conditional Text** tab.

6 Select the condition tags that you would like to exclude.

7 Select the **Advanced** tab.

Class project notes

Open **PDF**.

Select **TOC**.

Select **PageLayout**.

Type **Cities.pdf**.

Exclude **Conditions.Draft**.

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8 If you want to automatically include a table of contents (TOC), index, and glossary in your target, enable the following options:

- Generate TOC Proxy
- Generate Index Proxy
- Generate Glossary Proxy

Select **Generate TOC Proxy**.

9 Select the **PDF Options** tab.

10 Select whether you want to **Generate tagged document for PDF/UA**.

Tagged PDFs include additional information to improve accessibility when used with screen readers and magnifiers.

Select **Generate tagged document for PDF/UA**..

11 Click **Save**.

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Building a PDF Target

Let's build our PDF target and see how it looks now that we've changed the target settings.

To build a PDF target:

1 On the Project Organizer, right-click the target.

2 Select **Build**.

3 If you made any changes to the target, Flare will prompt you to save the changes. Click **Yes**.

The Builds pane appears.

Class project notes

Right-click **PDF**.

4 When the build is complete, double-click the target in the Builds pane to view the output.

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Learning More

Flare Help

The Flare help contains numerous useful topics about reviews and targets:

Project Management > Reviews and Collaboration

- Central Review Process
- Reviews and Contributions with MadCap Contributor

Step 5: Building and Publishing Output

- Adding Targets
- Editing Target Settings
- Building and Publishing a Single Target
- Building and Publishing Multiple Targets
- Publishing Destinations

Flare Intermediate Training

In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:

- Tracking changes
- Accepting or rejecting tracked changes
- Adding annotations
- Creating Word targets
- Publishing targets
- Using Flare with MadCap Central

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