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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
Welcome

Welcome to MadCap Software’s authorized Flare Basic 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 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:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>?</td>
<td>Help</td>
<td>Help topics that can provide you with more detail.</td>
</tr>
<tr>
<td>📝</td>
<td>Note</td>
<td>Additional information about a subject.</td>
</tr>
<tr>
<td>✔️</td>
<td>Tip</td>
<td>Best practices or shortcuts.</td>
</tr>
</tbody>
</table>

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. Extract the contents of the zip file, making sure to use the existing folder names. Following are the steps for extracting the files using WinZip.
   - Double-click the zip file.
   - Click **Extract** in the toolbar.
   - Select the "Use folder names" option.
   - Click **Extract**.
   - Close WinZip.

6. 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 7 or later
   - Microsoft .NET Framework version 4.6 or later
- Ghostscript - [https://www.madcapsoftware.com/downloads/ghostscript64.aspx](https://www.madcapsoftware.com/downloads/ghostscript64.aspx)
  Ghostscript is a free application that Flare uses to handle PDF and EPS files.
- Adobe FrameMaker 7.2 or later

**NOTE** Without Adobe FrameMaker 7.2 or later, you will be unable to import or export FrameMaker documents. If you do not need to import/export FrameMaker documents, you do not need FrameMaker.

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 Internet Explorer 10 or later or Edge to use during this course. If you use an older version of Internet Explorer, you may have issues with the skin editor.

(Optional) Feel free to install any additional browsers that your users might be using so you can view the help you create in different browsers.
do not copy
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
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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Supporting Flare Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adding content</td>
<td>Projects</td>
</tr>
<tr>
<td></td>
<td>Topics</td>
</tr>
<tr>
<td></td>
<td>Tables</td>
</tr>
<tr>
<td></td>
<td>Images</td>
</tr>
<tr>
<td></td>
<td>Videos</td>
</tr>
<tr>
<td>Importing content</td>
<td>Doc-to-Help project imports</td>
</tr>
<tr>
<td></td>
<td>RoboHelp projects imports</td>
</tr>
<tr>
<td></td>
<td>HTML Help project imports</td>
</tr>
<tr>
<td></td>
<td>DITA imports</td>
</tr>
<tr>
<td></td>
<td>HTML imports</td>
</tr>
<tr>
<td></td>
<td>Excel imports</td>
</tr>
<tr>
<td></td>
<td>Word imports</td>
</tr>
<tr>
<td></td>
<td>FrameMaker imports</td>
</tr>
<tr>
<td>Linking and layering content</td>
<td>Hyperlinks</td>
</tr>
<tr>
<td></td>
<td>Cross references</td>
</tr>
<tr>
<td></td>
<td>Popup links</td>
</tr>
<tr>
<td></td>
<td>Bookmark links</td>
</tr>
<tr>
<td></td>
<td>Drop-down links, expanding links, and toggler links</td>
</tr>
<tr>
<td></td>
<td>Related Topics, Keyword, and Concept links</td>
</tr>
<tr>
<td></td>
<td>Relationship table links</td>
</tr>
<tr>
<td></td>
<td>Table of contents</td>
</tr>
<tr>
<td></td>
<td>Index</td>
</tr>
<tr>
<td></td>
<td>MadCap Search, Google Search, and Elasticsearch</td>
</tr>
<tr>
<td></td>
<td>Glossary</td>
</tr>
<tr>
<td>Task</td>
<td>Supporting Flare Feature</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>Designing content</td>
<td>Responsive design</td>
</tr>
<tr>
<td></td>
<td><strong>Stylesheets</strong></td>
</tr>
<tr>
<td></td>
<td>Responsive layouts</td>
</tr>
<tr>
<td></td>
<td><strong>Table stylesheets</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Master pages</strong></td>
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<tr>
<td></td>
<td>Proxies</td>
</tr>
<tr>
<td></td>
<td><strong>Page layouts</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Skins</strong></td>
</tr>
<tr>
<td></td>
<td>Component skins</td>
</tr>
<tr>
<td>Single sourcing content</td>
<td><strong>Condition tags</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Variables</strong></td>
</tr>
<tr>
<td></td>
<td>Date/Time variables</td>
</tr>
<tr>
<td></td>
<td>System variables</td>
</tr>
<tr>
<td></td>
<td><strong>Snippets</strong></td>
</tr>
<tr>
<td></td>
<td>Snippet conditions</td>
</tr>
<tr>
<td></td>
<td>Snippet variables</td>
</tr>
<tr>
<td></td>
<td>Project links</td>
</tr>
<tr>
<td></td>
<td>External resource links</td>
</tr>
<tr>
<td></td>
<td>Micro content</td>
</tr>
<tr>
<td>Sending topics for review</td>
<td><strong>Track changes</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Annotations</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Topic reviews</strong></td>
</tr>
<tr>
<td>Building targets</td>
<td><strong>HTML5</strong></td>
</tr>
<tr>
<td></td>
<td>Clean XHTML</td>
</tr>
<tr>
<td></td>
<td>WebHelp and WebHelp Plus</td>
</tr>
<tr>
<td></td>
<td>HTML Help and Eclipse Help</td>
</tr>
<tr>
<td></td>
<td><strong>PDF documents</strong></td>
</tr>
<tr>
<td></td>
<td>Word documents</td>
</tr>
<tr>
<td></td>
<td>DITA documents</td>
</tr>
<tr>
<td></td>
<td>EPUB and MOBI files</td>
</tr>
</tbody>
</table>
### 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, master 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.

Other windows that may appear in the left pane include:

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

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 on the next page, there are two windows open: the North America topic and the Start Page.
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.

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.

<table>
<thead>
<tr>
<th>Window</th>
<th>How It’s Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attributes</td>
<td>View and change the attributes of selected content.</td>
</tr>
<tr>
<td>Concepts</td>
<td>Insert Concept (See Also) entries into topics.</td>
</tr>
<tr>
<td>Find and Replace in Files</td>
<td>Find and replace text in files.</td>
</tr>
<tr>
<td>Find Elements</td>
<td>Find HTML tags, Flare-specific content, or style classes.</td>
</tr>
</tbody>
</table>
TIP  You can move any of the windows in Flare to your preferred location. For example, you can make all of the right pane windows open on the left side of the Flare main window.

### Ribbon

The ribbons menus include:

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

**Quick Launch (Ctrl + Q)**

**Closing a window**

To close a window, click the close button 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.

**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.

<table>
<thead>
<tr>
<th>Folder Name</th>
<th>What's in this Folder?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analyzer</td>
<td>A SQL Compact database that contains information for Flare's Analyzer reports, such as broken links.</td>
</tr>
<tr>
<td>Content</td>
<td>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.</td>
</tr>
<tr>
<td>Project</td>
<td>Project files, including browse sequences, conditional tag sets, publishing destinations, glossaries, skins, targets, tables of contents, and variables.</td>
</tr>
<tr>
<td>Output</td>
<td>All built targets for the project, such as HTML5 or print documentation.</td>
</tr>
</tbody>
</table>

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 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 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.

**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.

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
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
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.

Images and Videos

In addition to text, topics can also 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 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 and lines 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**.

Select **New from template** and select the **NewTopic.htm** template.
4 Select a folder.

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

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.

Changing a Topic

Let’s add content to our new topic.

To change a topic:

1 Open a topic.

2 Type your content.

Class project notes

Open the San Francisco topic in the North America folder.

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.
Select **Save All**

### XML Editor Toolbar

Below is a summary of the XML Editor toolbar icons.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Preview" /></td>
<td>Preview</td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Select condition tags for viewing" /></td>
<td>Select condition tags for viewing</td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Layout (Web)" /></td>
<td>Layout</td>
<td>Toggles between the Web, Tablet, Mobile, and Print layout views in the XML Editor.</td>
</tr>
<tr>
<td><img src="image" alt="Medium (default)" /></td>
<td>Medium</td>
<td>Toggles between stylesheet mediums (alternative set of styles for different outputs) for viewing the topic in the XML Editor.</td>
</tr>
<tr>
<td><img src="image" alt="Page Layout" /></td>
<td>Page Layout</td>
<td>Toggles between page layouts and pages when the Layout is set to Print.</td>
</tr>
<tr>
<td><img src="image" alt="Insert a Hyperlink" /></td>
<td>Insert a Hyperlink</td>
<td>Opens the Insert Hyperlinks dialog box, which lets you create a hyperlink to other content.</td>
</tr>
<tr>
<td><img src="image" alt="Insert a Cross Reference" /></td>
<td>Insert a Cross Reference</td>
<td>Opens the Insert Cross Reference dialog box, which lets you insert a cross reference to another topic.</td>
</tr>
<tr>
<td><img src="image" alt="Insert an Image" /></td>
<td>Insert an Image</td>
<td>Opens the Insert Image dialog box, which lets you insert an image.</td>
</tr>
<tr>
<td><img src="image" alt="Insert a Snippet" /></td>
<td>Insert a Snippet</td>
<td>Opens the Insert Snippet Link dialog box, which lets you insert a snippet.</td>
</tr>
<tr>
<td><img src="image" alt="Insert a Variable" /></td>
<td>Insert a Variable</td>
<td>Opens the Variables dialog box, which lets you insert a variable.</td>
</tr>
<tr>
<td><img src="image" alt="Quick Character" /></td>
<td>Quick Character</td>
<td>Inserts a quick character, such as a copyright symbol, into a topic. You can click the arrow to select a character to insert.</td>
</tr>
<tr>
<td>Icon</td>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Index Entry Mode</td>
<td>Toggles between typing content and typing index markers.</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Concept Entry Mode</td>
<td>Toggles between typing content and typing concept markers.</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Show/Hide Space</td>
<td>Shows/Hides paragraph and space markers.</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Show Tags</td>
<td>Provides display options for the XML Editor, including showing/hiding tags, bookmark names, variable names, and index and concept markers.</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Expand All Collapsed Tags</td>
<td>Expands all collapsed tags.</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>Collapse All Headings</td>
<td>Collapses all content into the highest heading level.</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>Open Text Editor</td>
<td>Opens the topic in the Text Editor, where you can view and modify the XHTML code.</td>
</tr>
</tbody>
</table>

**Bottom toolbar**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image8.png" alt="Icon" /></td>
<td>Smaller Font</td>
<td>Reduces the font scaling by 10%.</td>
</tr>
<tr>
<td><img src="image9.png" alt="Icon" /></td>
<td>Reset Font Scaling</td>
<td>Resets the font scaling to 100%.</td>
</tr>
<tr>
<td><img src="image10.png" alt="Icon" /></td>
<td>Larger Font</td>
<td>Increases the font scaling by 10%.</td>
</tr>
<tr>
<td><img src="image11.png" alt="Icon" /></td>
<td>Set Font Scaling</td>
<td>Displays a list of common font scaling settings, like 200%.</td>
</tr>
<tr>
<td><img src="image12.png" alt="Icon" /></td>
<td>Show/Hide Condition Tags</td>
<td>Shows/Hides condition tag highlighting in the XML Editor, block bar, and span bar.</td>
</tr>
<tr>
<td><img src="image13.png" alt="Icon" /></td>
<td>Show/Hide Blocks</td>
<td>Shows/Hides the block bar on the left side of the XML Editor.</td>
</tr>
<tr>
<td><img src="image14.png" alt="Icon" /></td>
<td>Show/Hide Spans</td>
<td>Shows/Hides the span bar at the top of the XML Editor.</td>
</tr>
<tr>
<td><img src="image15.png" alt="Icon" /></td>
<td>Hide Indicators</td>
<td>Shows/Hides the collapsed content arrow in the block bar.</td>
</tr>
<tr>
<td><img src="image16.png" alt="Icon" /></td>
<td>Show/Hide Horizontal Ruler</td>
<td>Shows/Hides the horizontal ruler at the top of the XML Editor. Right-click the ruler to change the</td>
</tr>
<tr>
<td>Icon</td>
<td>Name</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>---------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>![ ]</td>
<td>Show/Hide Vertical Ruler</td>
<td>Shows/Hides the vertical ruler on the left of the XML Editor.</td>
</tr>
</tbody>
</table>

**Advanced XML Editor Functionality**

As mentioned above, 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.

**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 viewing the codes directly.

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 `<b>` tag between the word “Properties” and the period at the end of the sentence. For example, the code would look like:

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

If we click between Properties and the 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 </b> 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.
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.

Class project notes
Open the San Francisco topic in the North America folder.
Show blocks and spans.
Creating a Bulleted List

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

To create a bulleted list:

1. Open a topic.

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

3. In the Home ribbon, click the right arrow of the $\equiv$ 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.

**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
- .exp
- .ps
- .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](image)

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 ![image](image) in the XML Editor toolbar.
   - OR —
   - Select **Insert > Image**

   The Insert Image dialog box appears.
For **Select File**, select an image in the project.

— OR —

Click  and select an image file.

**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.

Type **Golden Gate Bridge**.
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 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.

**Inserting a Video**

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

- .asf
- .asx
- .au
- .avi
- .m4v
- .mid
- .midi
- .mp3
- .mp4
- .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.

**Class project notes**

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

Position the cursor on the blank line after the heading.
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. Click **OK.**

6. When you receive the notification that the file has been copied to your project, click **OK.**
   The video is copied to the Resources\Multimedia folder and appears in the topic as a gray box.
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**.

5. Type or select a **Number of rows**.

6. Type or select a **Number of header rows**.

7. Type or select a **Number of footer rows**.

Select 3.

Select 5.

Select 1.

Select 0.
Adding Content

MadCap Flare Introductory Training Guide
created with MadCap Flare

8. If needed, type a **Table caption** and select a caption location.

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.

10. Click **OK**

11. Add content to the table.

   **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.

2. Click ![icon] in the XML Editor toolbar.
   The topic appears in the Preview window.

---

Class project notes

Open the **Lima** topic in the South America folder.
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, master pages, stylesheets, glossaries, and tables of contents.

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

To find and replace text:

1. Open a topic.

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.

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

5. Select a **Find in** option.

---

**Class project notes**

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

Type **Columbia**.

Type **Colombia**.

Select **(current document)**.
Select **Match case** if you want your search to be case sensitive.

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**.
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).

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.

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.
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
- XML Editor tips and tricks
- Renaming topics
- Advanced options for bulleted and numbered lists
- Automatically formatting code snippets
Importing Content

What You Will Learn

In this module, you will learn how to:

- Import an HTML file
- Import a Word document
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, Excel worksheets, Word documents, and FrameMaker documents. Flare converts imported files to XHTML.

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.

Importing an HTML File

Importing an HTML file is a good way to add content from a website or another content authoring application.

Let’s import an HTML file into our Cities project.

To import an HTML file:

1. Select File > New.
   The Add File dialog box appears.
2. In the **File Type** section, select **HTML Import File**.

3. Select a **Source**.

4. Type a **File Name**.

5. Click **Add**.
   The Import Editor appears.

6. Click **+**.
7. Select the file(s) you want to add and click **Open**.

8. Select **Link Generated Files to Source Files** if you want to modify the imported HTML file in another HTML editor rather than in Flare.

9. Click the **Options** tab.

10. Select a folder for the imported topics.

11. Select whether you want to import the file's resources.

12. Select **Auto-reimport before 'Generate Output'** if you want to automatically re-import the HTML file(s) when you generate ("build") a target.

   ![NOTE](image) If needed, you can disable the auto-reimport option in a target.

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

   The Accept Imported Documents dialog box appears.

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

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

   The file is added to your project. If it is an HTML file, it is also converted to XHTML.
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.

To import a Word document:

2. In the File Type section, select MS Word Import File.
3. Select a Source.
4. Type a File Name.

Select New from template and select the MyWordImport template. Type Europe.
5 Click **Add**.
The Import Editor appears.

6 Select the **General** tab.

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

8 Click **Add File**.
The Open File dialog box appears.

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

10 Click the **Styles** tab.
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.

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.

14. Select how you want to import 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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>16</td>
<td>Select how you want to import table styles.</td>
</tr>
<tr>
<td>17</td>
<td>Select whether you want to preserve or ignore page breaks.</td>
</tr>
<tr>
<td>18</td>
<td>Select Link Generated Files to Source Files if you want to modify the imported Word document(s) in Word rather than in Flare.</td>
</tr>
<tr>
<td>19</td>
<td>Select Auto-reimport before 'Generate Output' if you want to automatically re-import the Word document(s) when you build a target.</td>
</tr>
<tr>
<td>20</td>
<td>Click Import in the Import Editor toolbar. The Accept Imported Documents dialog box appears.</td>
</tr>
<tr>
<td>21</td>
<td>When prompted to save the changes to the import file, click Yes.</td>
</tr>
<tr>
<td>22</td>
<td>Review the converted document and click Accept. The Word document is converted to XHTML and imported into your project.</td>
</tr>
</tbody>
</table>
Learning More

Flare Help
The Flare help contains numerous useful topics about importing content:

Step 1: Starting Projects > Importing
- HTML Files
- Excel
- Word
- FrameMaker

Flare Intermediate Training
In addition to the topics covered in this class, the Flare Intermediate class includes the following topics:
- Reimporting files
- 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 DITA files
- Importing HTML Help projects
- Importing RoboHelp projects
- Importing Doc-to-Help projects
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
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.

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

TOC as top-to-bottom menu in an HTML5 "Side Nav" 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 as 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).
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 the Linking tool 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.
   - 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.

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.

8. Select **Save All**.
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:

1. Open a TOC.
2. Open the Content Explorer.
3. Drag a folder or topic to the TOC.
4. Rename or delete any books or pages as needed.

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:

1. Open the topic that will contain the cross reference.
2. Position your cursor where you want to add the cross reference.

3. Click the Cross Reference button 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.

5. Select a topic.

6. In the Screen Tip field, type a description of the link. Screen tips are recommended by accessibility guidelines such as the US Government’s Section 508 and the W3C’s Web Content Accessibility Guidelines (WCAG).

7. Click OK.
The cross reference is added to the topic.

Creating a Hyperlink

Let’s create a hyperlink to a website.

To create a hyperlink to a website:

1. Open the topic that will contain the link.

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

3. Click 🌐 in the XML Editor toolbar.
   — OR —
   Select Insert > Hyperlink.
   — OR —
   Press Ctrl+K
   The Insert Hyperlink dialog box appears.

Select Topic in Project.

Select the San Francisco topic.

Type Link to the San Francisco topic.

Class project notes
Open the Sydney topic in the Oceania folder.

Select us.sydney.com.
4 In the Link to section, select Website.

5 Type a website address.

6 If needed, type a Screen Tip.
   Screen tips are recommended by accessibility guidelines such as Section 508 of the U.S Government's Rehabilitation Act and the W3C’s Web Content Accessibility Guidelines (WCAG).

7 If needed, select a Target Frame.
   Links to websites often appear in a new window.

Type http://us.sydney.com.

Type Link to us.sydney.com.

Select New Window/Tab.
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.

Click **OK**
The hyperlink is added to the topic.
Learning More

Flare Help
The Flare help contains numerous useful topics about linking content:

Step 2: Adding Content and Features
- Tables of Contents
- Links > Cross References
- 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
- Creating popup links
- Creating a link to a PDF
- Finding and fixing broken links
- Testing web links
- Creating expanding links
- Creating toggler links
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 master page
- Change a skin
- Apply a master page and skin to an online target
- Apply a page layout to a print target
About Design

In this module, we will discuss how to design online and print targets using styles, table styles, page layouts, master 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.
Master Pages

Master 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 master page to add a copyright statement to the bottom of every topic. You can also add built-in block of content (called "proxies") to your master 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

Applying a Stylesheet to All Topics

You can use a master stylesheet to apply a stylesheet to all of your topics. The master 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.

3 Select a **Master Stylesheet**.

4 If you want to be able to apply a different stylesheet to some topics in your project, 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 master stylesheet.

### Applying a Style to Content

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

**To apply a style:**

1 Open a topic.

**Class project notes**

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

MadCap Flare Introductory Training Guide
created with MadCap Flare

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

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.

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.

Click inside the “Boroughs” paragraph.

Click h2

Class project notes
Open the Toronto topic.
4. Select a **Table Style** and click **OK**.

**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:

1. Open a page layout.
2. Right-click the footer frame and select Edit Text.
3. Select whether you want to use a template.
4. Select a template.
5. Click OK
   The Frame Contents pane appears.
6. Modify the footer as needed.
7. Save and close the footer.

Selecting a Page Layout in a Target

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

Class project notes

Open the PageLayout page layout.

Click Yes.

Select Page n of N.flspn.

Click \[\] to center the footer.
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. In the Project Organizer, open the Targets folder and double-click a target.

2. Select the **General** tab.

3. Select a **Master Page Layout**.

4. Click **Save All**.

5. Click **Build**.

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

### Adding Content to a Master Page

In a master 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 master 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 a copyright statement to the bottom of the master page.
To add content to a master page:

1. Open a master page.

2. Position your cursor where you want to add content.

3. Type or insert your content.

Selecting a Master Page in a Target

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

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

To select a master page in a target:

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

2. Select the Advanced tab.

3. Select a Master Page.

4. Click Save All.
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 (tripane, top nav, and side nav) has slightly different settings that you can change, but they are all setup the same way.

### "Top Nav" skin design

![Top Nav skin design](image)

**This is topic A**


**Heading 2**

Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

**Let's change our TopNav skin's logo.**

### To setup a skin:

1. Open a skin. The Skin Editor appears.

### "Side Nav" skin design

![Side Nav skin design](image)

**This is topic A**


**Heading 2**

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**Class project notes**

Open the **TopNav** skin. Skins are stored in the Project Organizer in the Skins folder.
2. Select a **Pane Position**.

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.
5 For any item you want to change:
   * Select a style group.
   * Select a property.
   * Select a new value.

Selecting a Skin in a Target

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.
Learning More

Flare Help

The Flare help contains numerous useful topics about design:

Step 3: Design

- Styles and Stylesheets
- Page Layouts
- Master 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 master page proxies
- Setting page sizes and margins
- Tripane, TopNav, and SideNav skin design options
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
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, you could create a snippet for 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. When you exclude a condition tag in a target, the tagged content is not included in the output.

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, 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.

**To create a variable:**

1. Open the Project Organizer.
2. Open the Variables folder.
3. Double-click a variable set. The Variable Set Editor window appears.
4. Click ![icon](image) in the Variable Set Editor toolbar.
5. Type a name for the variable.
6. Type a definition for the variable.

---

**Class project notes**

Double-click the Variables variable set.

Type **CompanyName**.

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, master 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.
5 Select a variable.

**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.

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

3 Select a **Source**.

4 Select a **Folder**.

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

6 Click **Add**.

The snippet opens as a new tab in the XML Editor.
7  Add content to the snippet.

8  Save the snippet.

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.

Type the following:

The most populous cities in the Americas are:
1. São Paulo
2. Lima
3. Mexico City
4. New York
5. Bogotá

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.

**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.
To create a condition tag:
1. Open the **Conditional Text** folder in the Project Organizer.
2. Double-click a condition tag set. The Condition TagSet Editor appears.
3. Click ![icon] 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**.
6. Select a color.
7. Click **Save**.

### 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:**
1. Open the Content Explorer.
2. Select the file or folder to be tagged.

- **Class project notes**
  - Open the **Conditions** condition tag set.
  - Type **Draft**
  - Select dark red.

- **Class project notes**
  - 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.

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 XML Editor toolbar.
Applying a Condition Tag to Content

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

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.


4. Select a condition tag set.

5. Select a condition tag's checkbox.

Class project notes
Open the Asia topic in the Asia folder.

Select the Draft checkbox.
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.
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
- 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
do not copy
Topic Reviews with Central or Contributor

What You Will Learn

In this module, you will learn how to:

- Send a topic for review
- Accept review changes and annotations
- Accept a reviewed topic
About Topic Reviews using MadCap Central or MadCap Contributor

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

TIP  You can also send topics for review as PDF or Word documents. We will discuss building PDF targets in the last module.

Sending a Topic for Review

You can send one topic or multiple topics for review.

Let’s send the San Francisco topic for review.

To send a topic for review:

1. If you are sending a topic for review in Central, select View > MadCap Central to login to Central.

2. Select Review > Send for Review.
The Send Topic for Review dialog box appears.

3. Click Add Topics.

4. Select to send the topic for review using Central or a Contributor review package.

Class project notes

Select the San Francisco topic in the North America folder.

Select Send a review package.
5 If you select to send a Contributor review package, type a **Review Package Name**.

6 Click **Next**.

7 Type a subject for the email.

8 Type a message for the email.

9 Click **Add Email recipient**.
   The New Address Book Entry dialog box appears.

10 Type an email address and name.

11 Click **Send**.

After you send the review package, the reviewer(s) will open the review package in Central or Contributor to change the topic(s) and/or add annotations.
Accepting or Rejecting Review Changes

After a topic has been reviewed, you can accept or reject the reviewers' changes.

Let's accept the review changes in the San Francisco topic.

To accept a reviewed topic:

The Topic Review window appears.

2. Double-click the topic in which you want to accept or reject changes.

3. To accept or reject all changes, select Review > Accept All Changes or Review > Reject All Changes. 
To select or reject a specific change, click the change and select Review > Accept Change or Review > Reject Change.

4. Click Save.

Accepting a Reviewed Topic

After you accept or reject the reviewers' changes to a topic, you can accept the topic. When you accept the topic, the version of the topic you sent for review is replaced with the reviewed version of the topic.

Let's accept the San Francisco topic.

To accept a reviewed topic:

The Topic Review window appears.

2 Select a topic.

3 Click .

4 Click OK.
Learning More

Flare Help
The Flare help contains numerous useful topics about topics reviews:

Project Management > Reviews and Collaboration
- Central Review Process
- Review Package Process

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
- Creating a tracked changes report
- Adding annotations
- Creating an annotations report
Targets

What You Will Learn

In this module, you will learn how to:

- 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
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

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 master 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.

   ![Target Editor](image)

   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.

2. Select a **Master TOC**.

   Select **Home**.

   Select **TOC**.
4. Select the **Skin** tab.

5. Select a **Skin**.

6. Select the **Conditional Text** tab.

7. Select the condition tags that you would like to exclude. By default, all content is included.

8. Select the **Advanced** tab.

9. Select a **Master Page**.
### Building an HTML5 Target

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

**To build an HTML5 target:**

1. In 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](image)
   
   You can highlight a target in the Builds pane and click **View Output** to open it in a different browser.

### 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 Master TOC.

3 Select a Master 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.
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

9 Select whether you want to Generate a Tagged PDF. Tagged PDFs include additional information to improve accessibility.

10 Click Save.

**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 In the Project Organizer, right-click the 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 Builds pane to view the output.
Learning More

Flare Help
The Flare help contains numerous useful topics about targets:

Step 4: Developing Targets
- Process for Developing Targets
- Output Types

Step 5: Building and Publishing Output
- Building a Single Target
- Building Multiple Targets
- Building Output using a Batch Target
- Publishing Destinations

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

- Creating WebHelp, HTML Help, and Eclipse Help targets
- Creating Word targets
- Creating EPUB targets
- Publishing targets
- Creating batch targets
- Using Flare with MadCap Central
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