

New in this Edition

This edition has been updated to cover Flare Versions 5 and 6. We've also enhanced the book with new sections and expanded content based on your comments.

Here's a summary of what's new in this edition:

New content	In this book
WebHelp Mobile (Version 6). Create XHTML output for mobile devices.	Step 5B: Create Online Output
Link Viewer (Version 6). See what a topic or file is linked to. You can check links such as topics, TOCs, targets, snippets, skins, and variable sets.	Step 3: Develop Content
File and Project Templates (Version 6). Create and manage file and project templates using an improved process.	Step 1: Get Started
Multiple HTML File Import and Conversion (Version 6). Import multiple HTML files into your project and automatically convert them to XHTML.	Appendix B: Importing Content
DITA Import and Export (Version 5). Import DITA content and export DITA output. As of Version 6, you cannot create DITA content in Flare.	Appendix G
Text redaction (Version 5). Conceal confidential or sensitive information in printed output.	Step 3: Develop Content
Image Thumbnails (Version 5). Display images as thumbnails in online output or in the XML Editor window.	Step 3: Develop Content
Index Formatting Options and instructions for formatting a print index.	Step 4: Create Navigation Aids

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New content	In this book
<p>Styles. Concepts for using cascading stylesheets and style classes, including procedures for:</p> <ul style="list-style-type: none">▪ Resizing images with styles▪ Applying a style to selected text▪ Customizing styles with Flare’s Stylesheet Editor in Simplified and Advanced Views▪ Adding a style class	Step 3: Develop Content

For a full list of features in various versions of Flare, see “What’s New in This Version” in Flare’s Help.

What readers are saying

“Five Steps to MadCap Flare is a must-have for any serious Flare user. If you’re just starting out, Five Steps will give you the confidence and direction you need to get going. Even expert users will find useful tips and tricks in these pages. Whether used as a reference or training book, Five Steps has the essential information you need to make using Flare easier.”

— *Paul Pehrson, MadCap Flare Certified Instructor,
DocGuy Training*

“This book provides a guided, controlled introduction that will help new authors get out of the starting blocks and quickly become productive. An excellent addition to an online developer’s library.”

— *Neil Perlin, Madcap Flare Certified Instructor,
Hyper/Word Services*

“This book focuses more deeply than any other resource on the importance of understanding a project as the foundation of success with Flare. Written in plain, conversational language, the book helps readers determine project needs by asking questions—plus it supports Flare’s own increased emphasis on templates and how you can use them at many levels.”

— *Eddie VanArsdall, MadCap Flare Certified Instructor,
VanArsdall InfoDesign, Alexandria, VA*

“The hardest part about learning Flare is figuring out where to start. It’s overwhelming! This book is a wonderful guide through the maze of Flare features.”

— *Cheryl Landes, Tabby Cat Communications, Seattle WA*

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“Typically, I’ve only focused on one type of output from Flare—help systems. Using this book, however, I would be well equipped to try other output formats since the detail given in the book leaves no room for guesswork or error. When you are under pressure of deadlines, this book is the helping hand you need!”

— *Brian Laing, Documentation and Training Analyst,
Xerox Corporation*

“The ‘learn and do’ approach significantly cuts the learning curve. The roadmap and project forms alone are worth the cost of the book!”

— *Susan Huckle, Freelance Technical Writer, Irving, Texas*

“This book provides a real jump-start on the Flare learning curve, and the step-by-step tutorial for creating print output is worth the price of the entire book.”

— *Ginny Reynolds, Bridge-Tek Services*

“I wish I could have tapped into the advice on multi-level numbered lists when I began using Flare—plus the appendix on building context-sensitive help is terrific. This information would have saved me hours.”

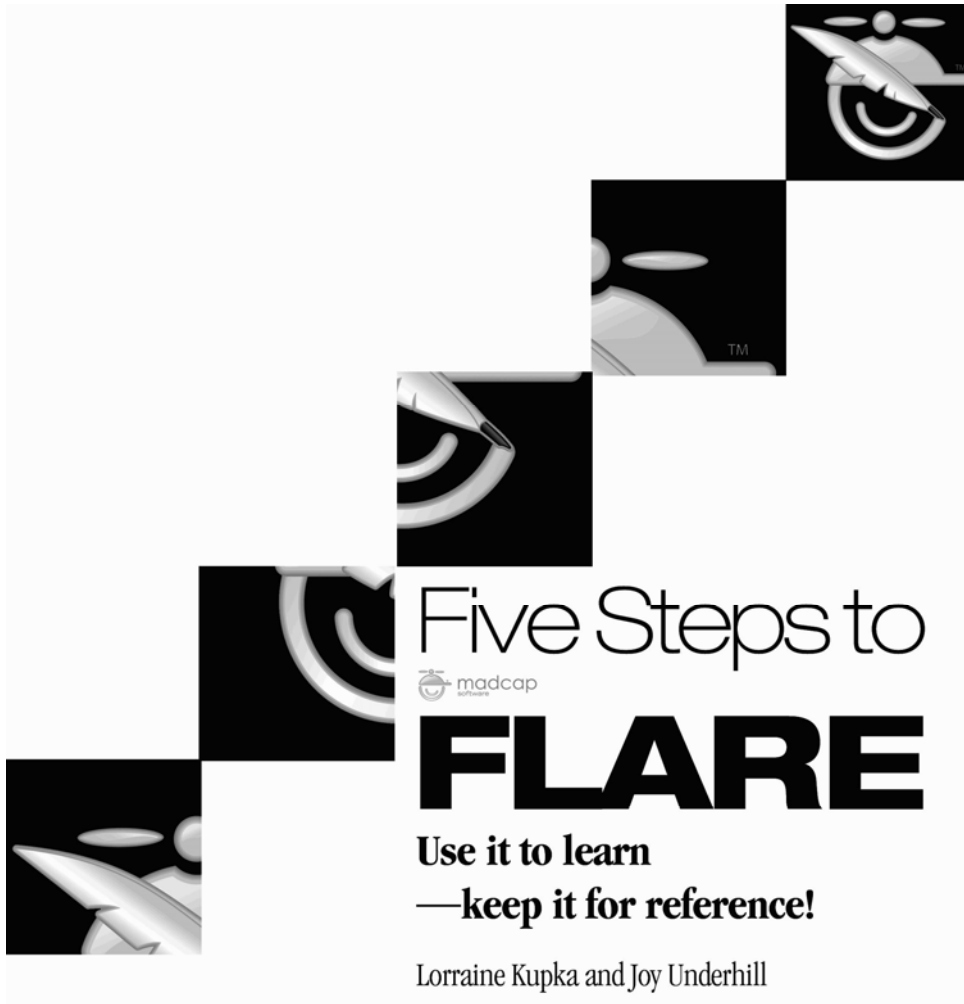
— *Doug Eaton, Technical Publications Lead, Sensis Corporation*

“This book is exactly what I need to get jump-started using Flare!”

— *Jeff O’Gorman, Specifications Writer, InterSpec*

“This book is incredible! It’s designed for new users in a way to help them get a handle on how to use Flare and does so quickly with just enough detail. If you’re new to Flare, you’ll want to read this book. If you’ve used Flare for a long time, keep this book on your bookshelf as a quick reference.”

— *Deb McNally, Technical Communications Specialist
Dover, NH*



Five Steps to



FLARE

**Use it to learn
—keep it for reference!**

Lorraine Kupka and Joy Underhill

fiddlehead **fp** publications

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Fairport, New York
USA

Five Steps to MadCap Flare™



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Foreword

By Anthony Olivier, CEO of MadCap Software

We developed MadCap Flare in part because we believe that good documentation shouldn't be hard—and it all begins with content management. To that end, Flare uses a native XML architecture that enables you to reuse content and publish in online, desktop and print formats.

Five Steps to MadCap Flare is a great resource, especially if you're new to Flare and topic-based authoring. It uses a step-by-step approach to unravel the complexities—and flexibility—of the user interface so that you can determine how best to use the product in your environment.

At MadCap Software™, we liken learning Flare to “peeling back the layers of an onion.” This book helps you take the first step and realize success with an initial project so that you're ready to take on more. Best of all, it describes the concepts behind the procedures and many of the interdependencies that are not always obvious to new users.

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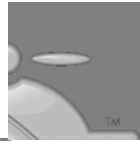
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Introduction



In this chapter ...

- Why we wrote this book
- Who this book is for
- What this book discusses
- What this book does not discuss
- How this book is organized
- A step-by-step approach
- A strategy for learning Flare
- Got feedback?



WHY WE WROTE THIS BOOK

We wrote this book because we needed it when we were learning Flare!

We have found Flare to be a progressive and powerful authoring tool, but one with a steep learning curve. Although the Flare Help system is extensive, we wanted a book that would tell us how to get started so that we would be comfortable exploring more on our own.

But when we looked in bookstores, there was no such book. So we wrote one!

WHO THIS BOOK IS FOR

This book is intended for new and experienced Flare users. If you've never used Flare, this book will get you through the basics. If you're an experienced Flare user, this book will help expand your knowledge of Flare and refresh your memory when needed. Our best practices are helpful for both new and seasoned users.

Our hope is that by stepping through this book, you'll be able to successfully plan for and create a Flare project. It won't have all the bells and whistles that you can create with Flare, but it will produce clean online, print, or DITA output.

Once you've mastered the Flare user interface—and have a good idea of how to build a project using Flare—you'll be able to learn more as you use Flare to create more complex projects.

Flare is like an onion. You learn it by peeling back layers one a time as you gain experience. Our goal is to help you peel back that first layer—without any tears!

WHAT THIS BOOK DISCUSSES

Five Steps to MadCap Flare describes how to get started using Flare. You will learn how to:

- Plan for a Flare project
- Create projects and topics
- Develop content
- Format content with styles
- Use features for navigating in output (Table of Contents, links, cross-references, indexes)
- Create context-sensitive help
- Use Flare features for reusing content (condition tags, snippets, variables)
- Create targets for online, print, and DITA output
- Build and distribute your output

This book also provides details about many useful features, such as importing content and troubleshooting your project.

WHAT THIS BOOK DOES NOT DISCUSS

This book does not contain comprehensive information about Flare.

The extensive documentation provided by the Flare Help system provides a wealth of information, and we encourage you to use it frequently. (Throughout this book, we tell you where to find specific topics in Flare's Help.)

Our intent is to give you enough information to familiarize you with Flare concepts and procedures, become comfortable using the user interface, and create a basic project.

HOW THIS BOOK IS ORGANIZED

This book contains the following chapters:

- **Document Basics** — Provides an overview of topic-based authoring and the types of documents Flare can be used to create.
- **A Quick Tour** — Explains the primary components of the Flare user interface.
- **Step 1: Get Started** — Details how to plan a Flare project and complete the plan using a task roadmap. This chapter also explains common tasks you'll do for Flare projects.
- **Step 2: Learn the XML Editor** — Provides a step-by-step tutorial for using common features of the XML Editor and includes supplemental information.
- **Step 3: Develop Content** — Outlines how to create lists and tables, insert images, symbols, and special characters into your content—plus how to use image thumbnails, mark text for redaction, create and change styles, and format your content with and without styles.
- **Step 4: Create Navigation Aids** — Describes how to include features, such as links, Tables of Contents, indexes, and cross-references, that let users navigate in output.
- **Step 5A: Create Print Output** — Details how to create simple print output and provides a tutorial for creating more complex print output. This chapter also describes how to build and distribute print output and use page layouts.
- **Step 5B: Create Online Output** — Describes how to create and distribute online output (Help systems and knowledge bases).
- **Appendix A: Planning Worksheets** — Provides worksheets for planning your project and tracking multiple targets.
- **Appendix B: Import Content** — Explains how to import content from Microsoft® Office Word, Adobe® FrameMaker®, and HTML files.

- **Appendix C: XML Editor Reference** — Provides supplemental reference information about the XML Editor.
- **Appendix D: Context-Sensitive Help** — Describes how to create context-sensitive help.
- **Appendix E: Troubleshoot** — Details how to troubleshoot your project and use the internal analyzer provided with Flare.
- **Appendix F: Single-Sourcing** — Explains Flare’s features for reusing content from a single source, including how to use condition tags to create customized output, and how to create and insert snippets and variables.
- **Appendix G: DITA Import and Export** — Explains how to import DITA content into Flare and export DITA code from Flare.
- **Appendix H: The Next Step** — Lists some of the Flare features you might explore on your own after completing your first project.

This book also contains an index.

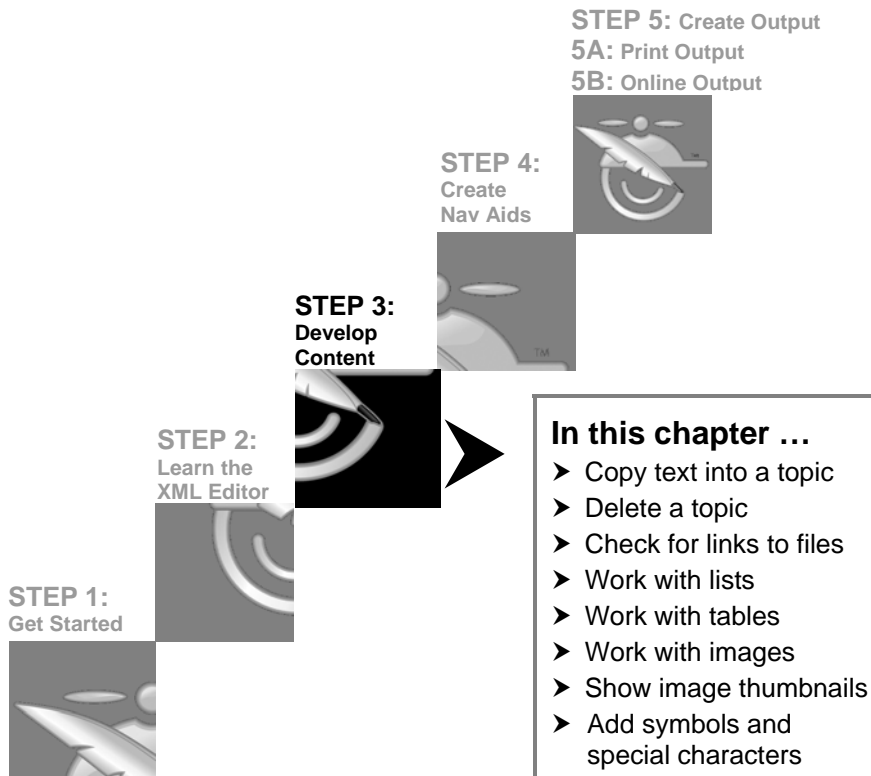
A STEP-BY-STEP APPROACH

This book is organized sequentially, meaning you should start at the beginning and proceed forward. Once you are more familiar with Flare, you can use the Table of Contents and index to jog your memory about certain features.

How you will use this book depends on your experience. We recommend that:

- **If you haven’t used a topic-based authoring tool**, read the Document Basics chapter first, followed by the Quick Tour and each of the five steps.
- **If you’re familiar with topic-based authoring tools**, scan the Document Basics chapter to learn basic Flare terminology. Then begin with the Quick Tour, followed by each of the five steps.

Step 3: Develop Content



OVERVIEW

Throughout this book, you'll see **content** and **topic** used often. Let's take a moment to review what these terms mean:

- A **topic** is a standalone unit of content. Each topic is a file (with an .htm extension) that conforms to the XML specification.
- **Content** is various types of information contained in a topic, such as text, tables, lists, images, links, and multimedia.

A Flare **project** is simply a collection of topics and related files, which are stored in **project folders**.

In this chapter, you'll learn how to:

- Copy and paste content into a topic (without importing it)
- Delete a topic
- See what a file links to
- Add lists, tables, images, and special characters to topics
- Format your content
- Customize styles
- Mark sensitive text to be concealed (text redaction)

Your content can be new or imported (see Appendix B: Import Content, for more about importing content). This chapter does *not* describe how to create navigational aids (links, TOCs, indexes) that point to topics. We'll cover those in Step 4: Create Navigation Aids.

Let's begin by learning how to copy text into a topic.

Note — To learn how to create new topics, see "Adding a topic" on page 49.

COPYING AND PASTING TEXT INTO A TOPIC

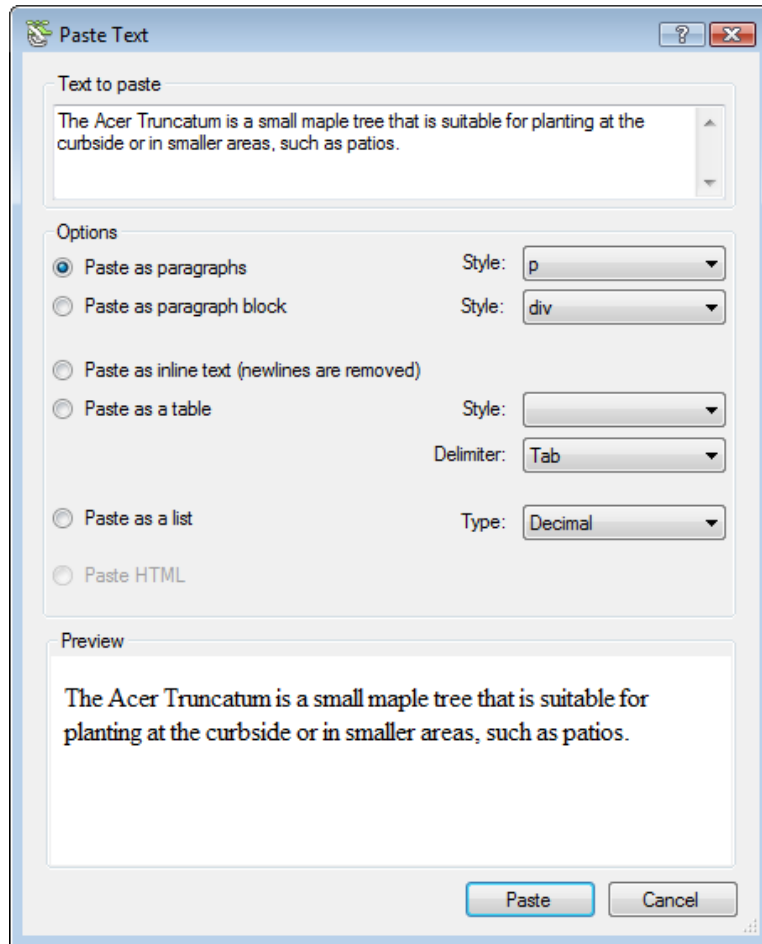
There may be times when you have small pieces of text you want to insert into topics. Copying and pasting is the fastest and easiest way to do it. This method works well for small blocks of text that will not become standalone topics.

Flare's paste feature is smart! It lets you decide which format to use when pasting the text.



To copy and paste text into a topic:

1. Open the Flare topic you want to paste the text into.
2. Select the source text and press **CTRL + C** to copy it (from Word, FrameMaker, another Flare topic, or any other word processing application).
3. Place your cursor where you want to insert the text and press **CTRL + V**. If you're pasting content from another application, the Paste Text dialog opens and shows a preview of the text you are pasting; otherwise, the content is pasted immediately.



4. In the Options section, choose how you want the text pasted (as paragraphs, paragraph block, list, table, etc.). To the right of your choice, select the style to apply to the text (if applicable).
5. Click **Paste** to paste the text.

DELETING A TOPIC

You can delete a topic from your project, but use caution when doing so, as other topics or project files might link to that topic. When you delete a topic, its index markers are also deleted.

Best Practice— Before deleting a topic, save a backup copy of your project. Then check for and remove links to that topic. See “Checking for links to a topic” on page 102.

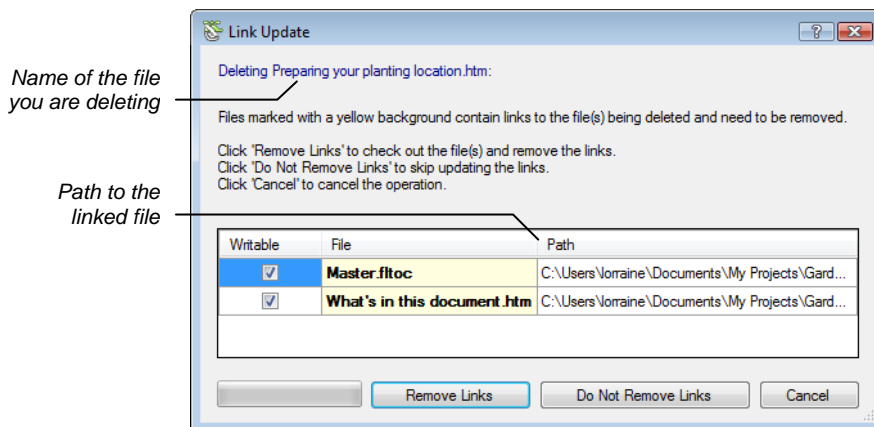
Use the following procedure to delete a topic from your project.



To delete a topic:

1. Make sure that the Flare project is open and the Content Explorer is in view.
2. Do one of the following:
 - Select the topic in the Content Explorer and select **Edit** → **Delete**.
 - Right-click the topic and select **Delete** from the menu.
3. Click **OK** to confirm the deletion.

If the topic has links to other files, such as links to other topics or a TOC, the Link Update dialog opens.



4. Do one of the following:

To ...

Delete the topic and remove all links to it

Do this ...

Click **Remove Links**.

Note— *Removing* the link to a TOC creates an unlinked TOC item. *Removing* the link to another topic leaves the unlinked text of the link in the other topic.

To ...	Do this ...
Delete the topic without removing links to it	Click Do Not Remove Links . <i>Note</i> — <i>Leaving</i> the link to a TOC or other topic creates a broken link in the TOC or topic.
Cancel without deleting this topic	Click Cancel .

If you selected **Remove Links** or **Do Not Remove Links**, the topic is deleted from your project.

5. Click **Save All**  to save your work.

CHECKING FOR LINKS TO A TOPIC

The Link Viewer window lets you see what a topic or file is linked to. You can check links to and from any project file, such as topics, TOCs, targets, snippets, skins, even variable sets. For example, you might want to see if a topic is included in a TOC before you delete that topic.

Use the following procedure to check for links to and from a topic or project file.



To check for links:

1. From the Content Explorer or Project Organizer, open the topic or project file you want to check links for.

Tip — To open the Link Viewer window without first opening the topic right-click the topic or project file and select **View Links** from the menu.

2. Select **View** → **Link Viewer**. The Link Viewer window opens in the right pane (by default).