

New in this Edition

The fourth edition of *Five Steps to MadCap Flare* has been updated to include features changed in Flare Versions 9 and 10 as well as several new features. You'll also find new and updated images of screens, minor revisions to procedures, and new notes and tips throughout the book.

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

New content	Where to find it
Characters and Symbols. New procedures and enhanced functionality for inserting and working with symbols and special characters.	Step 3
EPUB. Includes information and instructions for creating an ebook in MOBI format.	Appendix H
Filtering condition tags in the XML Editor. Working in the XML Editor when you have multiple condition tags applied to content is now much easier with the new Flare feature that lets you hide content tagged with selected condition tags so you can work with your topics as they will look in the finished output.	Appendix F
FrameMaker import. FrameMaker import has been enhanced. You can now import images with callouts in a format that you can maintain with MadCap Capture, and master pages are automatically imported as Flare page layouts.	Appendix B
New page types. Flare includes new page-layout page types for first and empty pages to support right-to-left languages. Step 5A includes information about the new page types and when to use them.	Step 5A
Preview topics with specific page layout. You can now preview topics in Print Layout mode with a particular page layout that you select from the XML Editor's toolbar.	Step 2
Responsive output. Create "smart HTML5 output" that can be viewed on different devices like tablets, smart phones and web browsers from one set of output files and one target and skin.	Step 5B

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New content	Where to find it
Right-to-left languages. Contains information about Flare's support of RTL languages in outputs and in the XML Editor.	Document Basics
Undefined condition tags. Flare now has a method for fixing undefined condition tags — condition tags specified in targets and then deleted. Appendix F describes why they occur and how to fix them.	Appendix F

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*

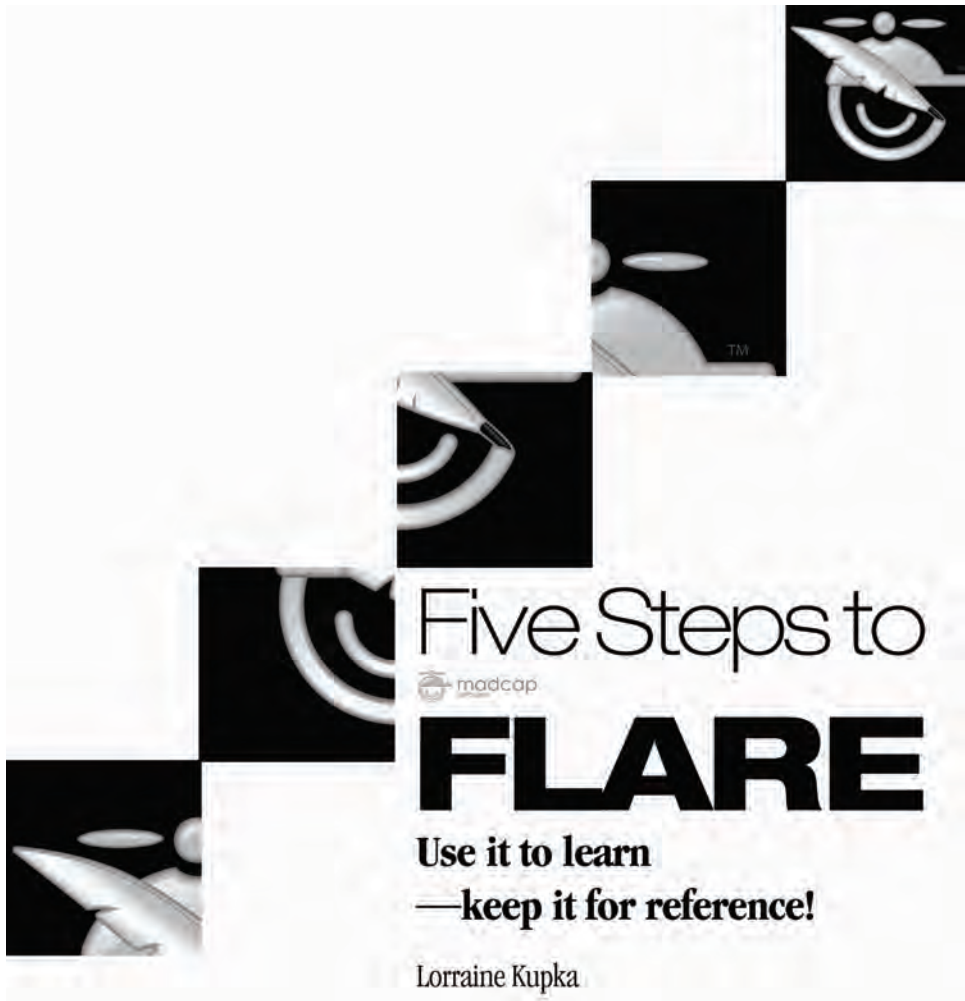
“This book is exactly what I need to get jump-started using Flare!”

— *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*

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Five Steps to MadCap Flare™



Fourth Edition, for Flare Version 10

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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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Introduction



In this chapter ...

- Welcome
- Why I 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



WELCOME!

Welcome to the fourth edition of *Five Steps to MadCap Flare*. Keeping this book current due to MadCap Software's continued development of Flare is no small task; but MadCap's commitment to developing Flare and to implementing enhancements based on user feedback are just two of the reasons why I love this product. I hope you find *Five Steps to MadCap Flare* informative and useful; and just like MadCap, I'm interested in your comments and suggestions so I can continually improve this book. Please contact me at Info@Northcoastwriters.com.

WHY I WROTE THIS BOOK

I wrote this book because I needed it when I was learning Flare!

Flare is a progressive and powerful authoring tool, but one with a steep learning curve. Although the Flare Help system is extensive, I wanted a book to help me get started so that I would be more comfortable exploring its many features on my own.

But there was no book about getting started with Flare in the bookstores, so ... time to write 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. Best practices, found throughout the book, are helpful for both new and seasoned users.

By stepping through this book, you should be able to successfully plan for and create a Flare project. You won't know everything there is to know about Flare; but you'll be able to create online, print, EPUB, and DITA output that follows industry best practices.

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 at a time as you gain experience. The goal of this book 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 your Flare project
- Create projects and topics
- Develop content that includes lists, tables, and images
- 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, EPUB, 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 I encourage you to use it frequently. (Throughout this book, I'll tell you where to find specific topics in Flare's Help.)

This book's intent is to provide enough information to familiarize you with Flare concepts and procedures so you're comfortable using the user interface and creating 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 you can create with Flare.
- **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 with your Flare projects.
- **Step 2: Learn the XML Editor** — Provides a step-by-step tutorial for using features of the XML Editor and includes supplemental information ("Learn more").
- **Step 3: Develop Content** — Describes 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 CHM 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: Track and Troubleshoot** — Details how to troubleshoot your project and use the internal analyzer provided with Flare. Also describes how to track project status with file tags and create various reports that show project information.
- **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, how to create and insert snippets and variables, and how to link a global project to other Flare projects.
- **Appendix G: DITA Import and Export** — Explains how to import DITA content into Flare and export DITA code from Flare.
- **Appendix H: Create EPUB Output** — Describes how to build and distribute EPUB output (.epub and .mobi).
- **Appendix I: The Next Step** — Lists some of the Flare features you might explore on your own after completing your first project.

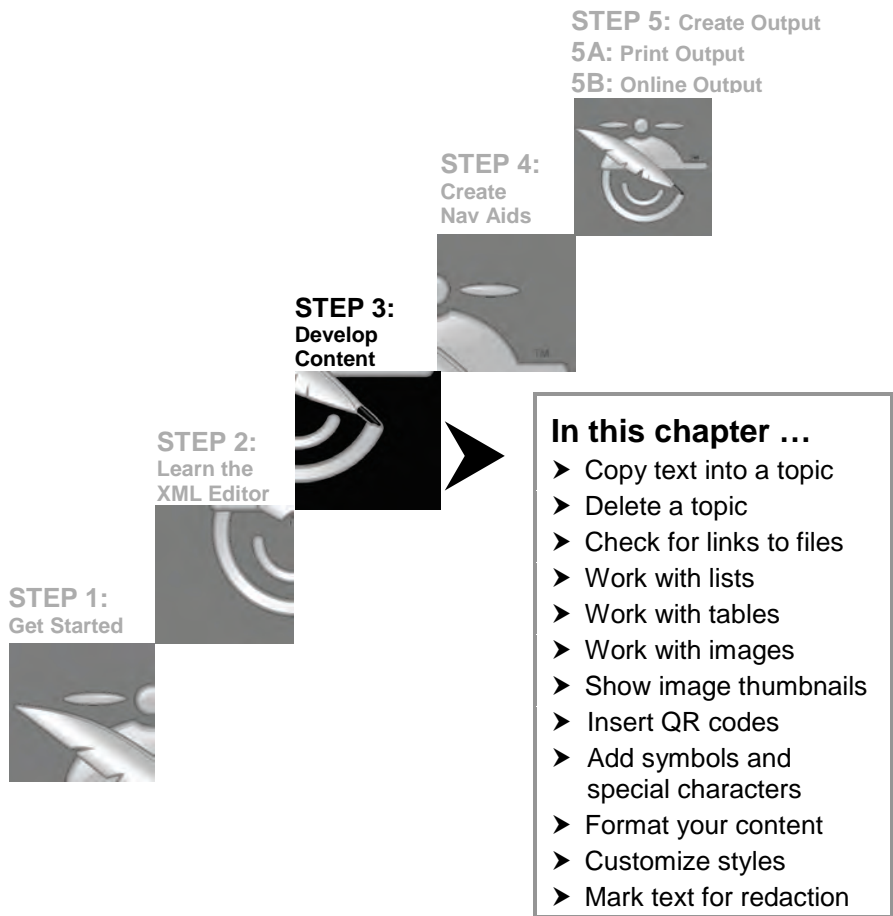
This book also contains an index.

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.

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. That's covered 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 53.

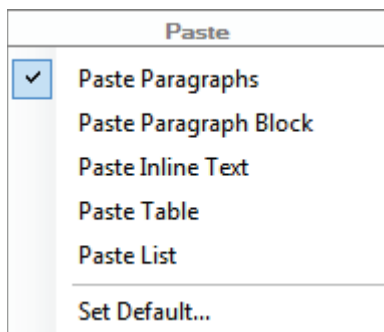
COPYING AND PASTING CONTENT INTO A TOPIC

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. You can even paste images into Flare.

► 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**. The content is pasted immediately. If you're pasting content from an external application, a paste icon  appears. The text is automatically pasted in the default format (as a paragraph, unless you change the default).

To change the format, click the paste icon and select a different paste option. To set the default for pasting content, select **Set Default**. Then select the paste option that you want as a default.



Tip— The paste icon remains visible until you perform another action (such as typing text or selecting a menu option) within the same topic.

- To copy and paste an image into a topic:
1. Open the Flare topic you want to paste the image into.
 2. Select the image to be copied and press **CTRL + C**.
 3. Place your cursor where you want to insert the image and press **CTRL + V**.
 4. Navigate to the folder in your Flare project in which to store the image (typically in the Content Explorer's Resources/Images folder), type a name for the image file, and click **Save**.

The image is stored in your project and pasted into the topic.

DELETING A TOPIC

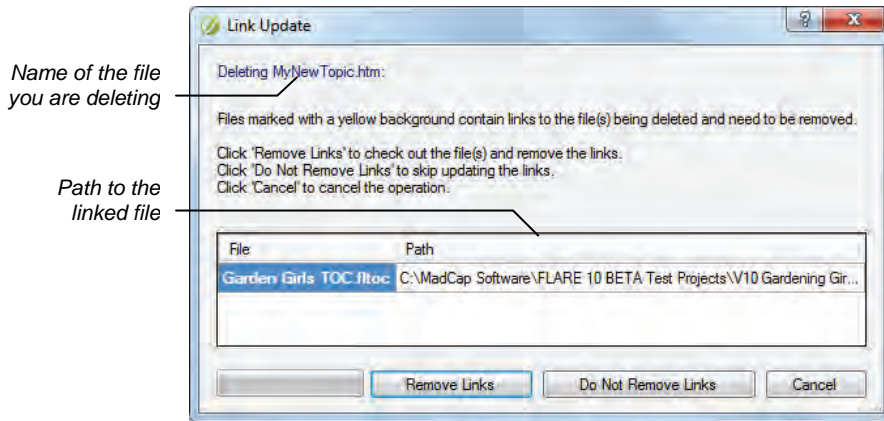
You can delete a topic from your project, but use caution when doing so, as other topics or project files might link to that topic. When you delete a topic, its index markers are also deleted.

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 108.

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. 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 ...	Do this ...
Delete the topic and remove all links to it	Click Remove Links . Note — <i>Removing</i> the link to a TOC creates an unlinked TOC item. <i>Removing</i> the link to another topic leaves the unlinked text of the link in the other topic.
Delete the topic without removing links to it	Click Do Not Remove Links . Note — <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.

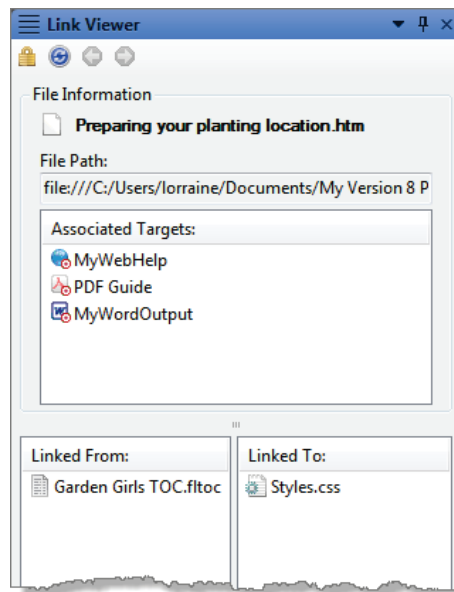
Use the following procedure to check for links to and from a topic or project file.


► 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** tab → **Link Viewer**. The Link Viewer window opens in the right pane (by default).



Broken links are identified in the Link Viewer window by this icon .

3. (Optional) Complete the following tasks as needed.

To ...	Do this ...
Open a linked file	Double-click the file name in the Link Viewer.
View links for a different topic or file	Do one of the following: <ul style="list-style-type: none"> ▪ Activate the file (click its tab or open it in the middle pane). ▪ Right-click the file in the Content Explorer or Project Organizer and select View Links.
Refresh the Link Viewer window (Helpful if you changed links.)	Click Refresh  in the Link Viewer toolbar.
Toggle between locking and unlocking the Link Viewer window (Locking lets you activate other topics and files without changing the display.)	Click Lock the Link Viewer  in the Link Viewer toolbar.
View the previous set of links you've already viewed	Click Show links for previous file  in the Link Viewer toolbar.
View the next set of links you've already viewed	Click Show links for next file  in the Link Viewer toolbar.

4. Close the Link Viewer window.

WORKING WITH LISTS

As with most word processing programs, Flare lets you add various types of lists to your content, including:

- Single-level lists
- Multi-level lists
- Numbered lists, sequenced by numbers or letters
- Bulleted lists

You can also add items to lists, rearrange, sort, and merge them.