Five Steps to MadCap Flare (First Edition), by Lorraine Kupka and Joy Underhill

Reviewed by Nita Beck and Ginny Reynolds

Five Steps to MadCap Flare is intended for new Flare users to help them successfully plan and create their first project in Flare, an XML-based topic authoring tool. Because Flare provides so many powerful features and options, new users can be overwhelmed trying to figure out how to begin. In this book, the authors promise to assist their readers in producing "clean online or print output" the first time out if they follow the advice offered. Their objectives for their readers are to:

1. Plan a Flare project

2. Create the project and some topics

3. Develop the topics' content

4. Create navigational aids (e.g., table of contents, cross-references and hyperlinks, index)

5. Generate output

The book is not intended to be a comprehensive reference guide of all things Flare, but it does do much more than meet the above objectives. Beyond providing a starting place for creating a basic project, the authors offer examples, tips, and best practice recommendations regarding a wide range of Flare's features.

The book is organized into more than the "five steps" of the title. First, the authors ground their readers in important "document basics" terminology and concepts that are necessary when embarking on the topic-based authoring methodology. Next, they take readers on a quick tour of the Flare user interface. Only afterward do the five steps begin:

1. Step 1. Get Started – This section covers more than starting a new Flare project. It also covers common tasks such as adding topics, previewing topics, spell checking, and creating topic templates—all important building blocks for using Flare.

2. Step 2. Learn the XML Editor – The Flare XML Editor can be at best confusing or at worst intimidating for new users, so the authors provide useful information for harnessing the XML Editor. Becoming comfortable with the XML Editor is a necessary stepping stone to creating a Flare project.

3. Step 3. Develop Content – Here the authors get into the meat of creating topic content: lists, tables, images, borders, special characters and symbols, topic background colors. They also extensively discuss the various ways to format text: local (inline) formatting vs. style classes and cascading style sheets.

4. Step 4. Create Navigation Aids – The authors here tackle the mechanics of creating a table of contents (TOC), links, cross-references, and indexes.

5. Step 5a. Create Print Output and Step 5b. Create Online Output – The authors wisely break out the creation and generation of output into the two major forms of output: print and online. In the chapter on print output, the authors define the various kinds of print output that Flare can generate (e.g., Word, PDF,

FrameMaker, to mention a few) and offer recommendations for setting up simple and complex print output. Here the authors also include a helpful step-by-step tutorial for setting up all the components (e.g., page layouts with customized footers and headers) needed to produce a complex print document with Flare. We have found this tutorial to be one of the most useful sections of the entire book.

In the chapter on online output, the authors define the various kinds of online output Flare can generate (e.g., DotNet help and WebHelp, to mention two) and discuss how to define a master page and skin. They also offer recommendations for testing and troubleshooting online output, and wrap up by touching on the concepts of publishing and distributing online output.

The rest of the book is devoted to a series of useful appendixes:

- Appendix A. Planning Worksheets – This appendix offers a set of worksheets to help the new Flare user plan a project. The same worksheets could easily be adapted for documenting design decisions for an existing project.

- Appendix B. Import Content – This appendix surveys the options for importing source material into Flare, touching on Word imports, FrameMaker imports, and HTML file imports.

- Appendix C. XML Editor Reference – Much of this appendix provides a reference guide for Flare features: tables of toolbar buttons and their purposes, of cursor shapes and their meanings, of various keyboard and mouse shortcuts. The authors also included how-to material on applying color to text (using an inline method rather than a style method) and on using the IntelliSense feature.

- Appendix D. Context-Sensitive Help – The authors wisely include this in their book, as even brand new users may need to address context-sensitive help (CSH) in their first Flare project. The authors cover how to set up the header and alias files, as well as how to test the CSH calls; however, the authors do not address what the application developers might need to do to hook in Flare output, given that they are not the intended audience of the book. Instead the authors direct the reader to the appropriate section of the Flare Help system.

- Appendix E. Troubleshoot – This appendix offers useful suggestions for troubleshooting the common things that might go wrong with Flare output: broken links, unlinked TOC items, missing or problematic images, and build (output generation) errors.

- Appendix F. Single-Sourcing – Here the authors introduce what some might say are Flare's best features, those that make single-sourcing (the generation of different outputs from the same set of source content) possible: condition tags (which allow one to include or exclude source material as output is generated), snippets (reusable, smaller-than-a-topic chunks of content), and variables (containers of potentially changeable values, such as product names and version numbers).

- Appendix G. The Next Step – In this final section of the books, the authors give their readers a gentle push toward exploring many of Flare's additional and rich features, including global project linking, auto-numbering, text boxes, glossaries, and mini-TOC and list-of proxies.

Five Steps to MadCap Flare might not be comprehensive, but it covers a lot of ground for new Flare users. Although the book addresses V4.x, new users of newer versions of Flare are sure to find it relevant and useful. We believe this book is an invaluable tool for anyone who wants to get up and running with MadCap Flare.

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