

IMPORT GUIDELINE
From Word to Flare



Last updated 10/14/2024

The documentation is designed to support Unit4 ERP.

This document is intended for Unit4 ERP Consultants and customer Super Users, and thus assumes in-depth knowledge of existing Unit4 ERP functionality.

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1 Introduction

1.1 Purpose of the document

This manual supports you during the migration process from **Word** to **Madcap Flare**. It describes the import process in detail, provides step-by-step instructions and offers some tips and tricks to carry out the import smoothly.

1.2 Software versions

The manual is based on a software consisting of:

1. **Microsoft 365 Office**
2. **MadCap Flare 2024 r2**

1.3 Before you start

The whole process of importing Word documents into Flare is controlled by a specific XML (.flimp) file within the Flare project. This file describes the names and locations of the Word document(s) to be imported and various settings that control how the incoming Word document is styled and segmented into topics.

Reasons to import documents

There are two possible scenarios for importing the documents:

- You have legacy guides or manuals written in Word that you need to migrate to Flare (new project).
- You created and maintained content in Word format that you need to migrate to your Flare project (existing project and a need to re-import each time the source document is updated).

The migration can be driven by several key reasons:

- Single-source publishing - you can create content once and publish it across multiple formats (HTML5, pdf, and others).
- Version control - Flare facilitates it to manage updates or track changes in comparison to Word.
- Content reusability - With components such as snippets, variables, you can reuse topics across different projects streamlining content management.
- Responsive design - Flare enables to create responsive layouts of your content for multiple devices.
- Enhanced collaboration - multiple authors can work on the same project, improving collaboration or workflow efficiency.
- Help authoring and advanced **Search** functionality.

Planning

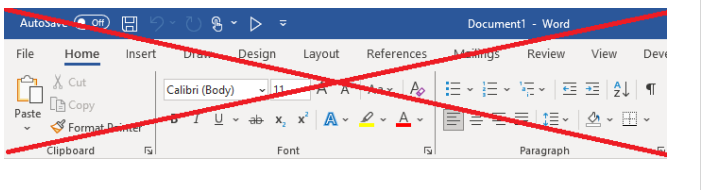
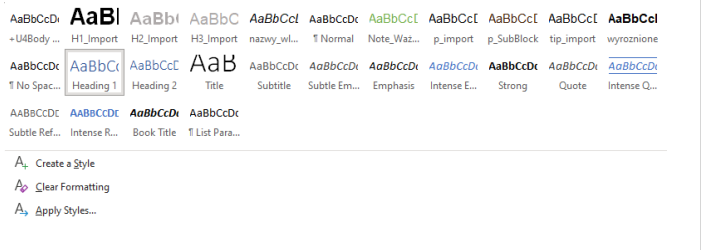
The process of importing legacy Word documents into Flare should be carefully planned. The more you plan the more you will be able to leverage. You should consider:

- How many files do you have?
- How long are the documents?
- Differences between the documents type
- How much content are you importing?
- Do your Word documents use styles?

Try to identify the content similarities to make the use of templates, single-sourcing opportunities and other Flare components.

Applying styles

If there is a lot of manually-applied inline formatting, take the time within Word to replace this with a simple set of semantically-named paragraph and character styles. Using styles helps you to maintain your content globally.

Remove inline formatting	
Use Styles instead	

Note: The formatting that you associate with the styles in Word is unimportant, since you will be mapping the styles to the corresponding styles within your Flare stylesheet during the import process.

Warning: We must not copy and paste content between Word and Flare because it brings extra formatting and affects the code.

Example below shows how the lack of a careful document clean-up results in the code:

To create a new account:

1. From the Home tab, select **New Account**.

The **New Account** window opens.

2. Enter these details:
 - Username
 - Password
3. Click **Confirm**.

Source: [WordImportMadCapFlare.html](#)

```
<p>To create a new account:</p>
<ol style="list-style-type: decimal;margin-left: 36pt;" start="1">
|   <li>From the Home tab, select New Account.</li>
</ol>
<p>The New Account window opens.</p>
<ol style="list-style-type: decimal;margin-left: 36pt;" start="2">
|   <li>Enter these details:</li>
</ol>
<ul style="list-style-type: disc;margin-left: 72pt;">
|   <li style="list-style-type: disc;"> Username</li>
|   <li style="list-style-type: disc;"> Password</li>
</ul>
<ol style="list-style-type: decimal;margin-left: 36pt;" start="3">
|   <li>Click Confirm.</li>
</ol>
```

Source: [WordImportMadCapFlare.html](#)

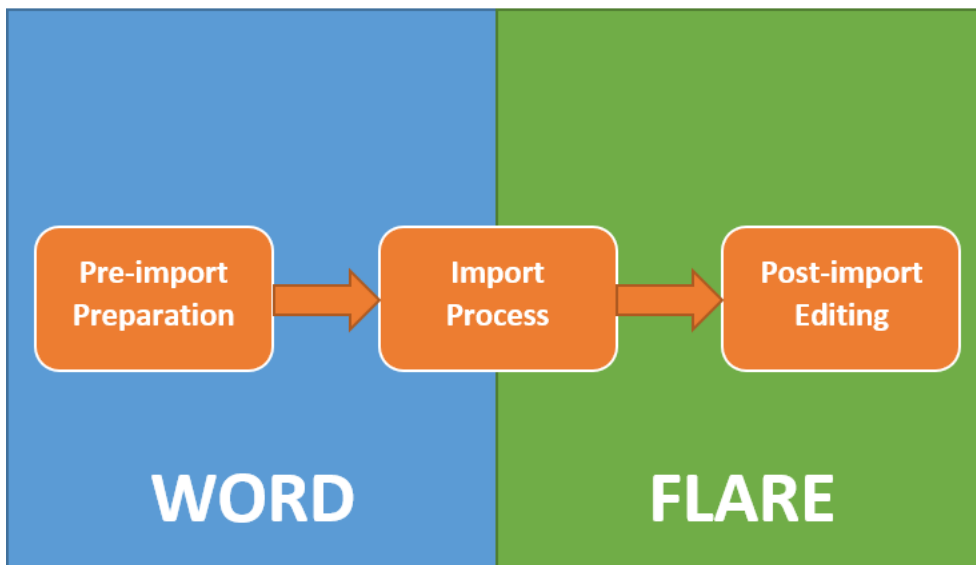
```
<p>To create a new account:</p>
<ol>
|   <li>
|       <p>From the Home tab, select New Account.</p>
|       <p>The New Account window opens.</p>
|   </li>
|   <li>Enter these details:
|       <ul><li>Username</li><li>Password</li></ul></li>
|   <li>Click Confirm.</li>
</ol>
```

Source: [WordImportMadCapFlare.html](#)

2 Import process overview

The Import process is divided into three main stages:

1. **Pre-import preparation** - files that are imported into Flare need to be edited before the import. During this stage, you clean up a source Word document and prepare it for migration.
2. **Import process** - during this stage you map the styles from Word to the corresponding ones in Flare.
3. **Post-import editing** - final stage in which you check the imported document, apply necessary formatting and set the project properties.





3 Pre-import preparation

3.1 Workspace

Create two folders

Create two folders, one with the original documents and the second one for those files to be edited. In this way, you are able to compare two versions and have a back-up in case of errors.

 Original_doc

 To_Import

Create a pattern for styles

Flare software must understand styles from Word to map them properly. What you can do is to prepare a pattern for the styles that are going to be mapped.

Tip: Scroll through files that will be migrated and find most repetitive styles - headings, paragraphs, inline bolds, italic etc.

Configuring Unit4 Prevero for single sign-on

H1 - heading

Configuring the domain administrator

H2 - heading

The following configurations must be made in the domain administrator: p - paragraph



Open the domain administrator and click the **Network domains** tab.

p:Tip

- Enter the network domain of the company network, in which the users and the Unit4 Prevero server can be found.
- Specify a user, who has read permissions on the directory server.

① Important note (especially when there are several domains):

p:Note

- In the Domain field, the full Windows domain name must be specified (e.g. testdomain.com – output via ipconfig/all).
- In the User name field, the user must be specified including the full user domain (especially if

Figure 3-1: Finding patterns in Word

Scroll through the styles in Flare to find the applicable ones.

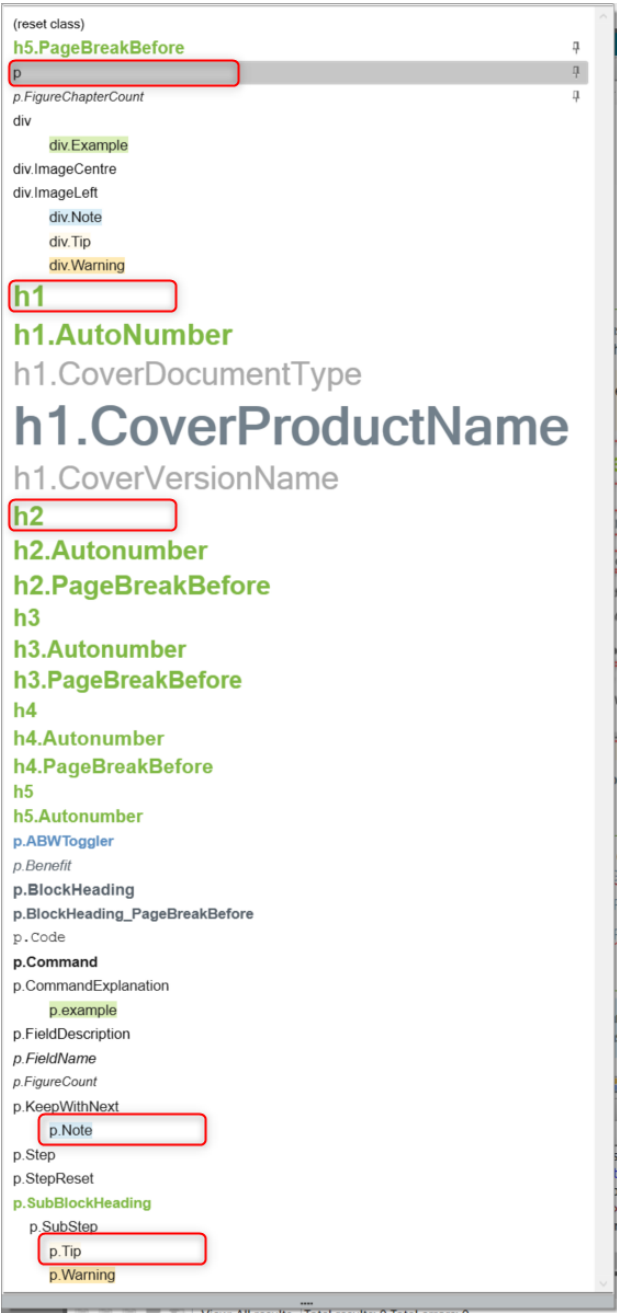


Figure 3-2: Finding applicable styles in Flare

The styles from Word and Flare need to mirror each other. Thus, you can create your own table with matching styles to have a comparison.

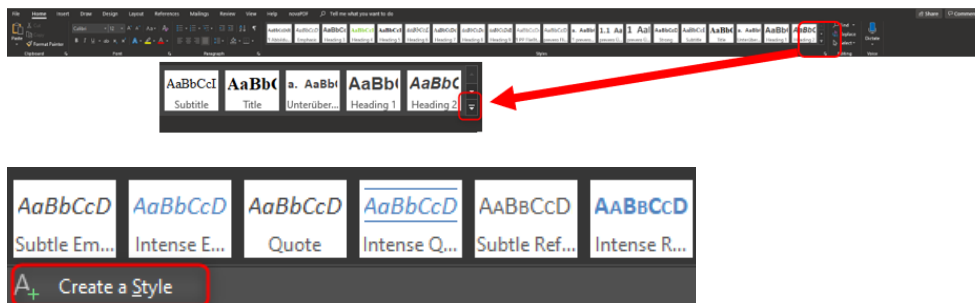
Word	Flare
H1-H3	H1.Autonumber- H3.Autonumber
Inlinebold	span.Command
①•The system requirements{XE:"System Requirements"} should be met by your system in order to guarantee optimal operation.¶	p.Note
→ In your installation package, you can find the file Unit4FP&A_10.11.0.exe. Double-click to start the file. The installation wizard{XE:"Installation Wizard"} opens and guides you through the installation.¶	p.Tip
Hyperlink	p.Hyperlink
BulletList	From the Ribbon
Numbered List	From the Ribbon
Captions	span.FieldName
Code	span.Code
Italic	span.FieldName

Figure 3-3: Table with styles between Word and Flare

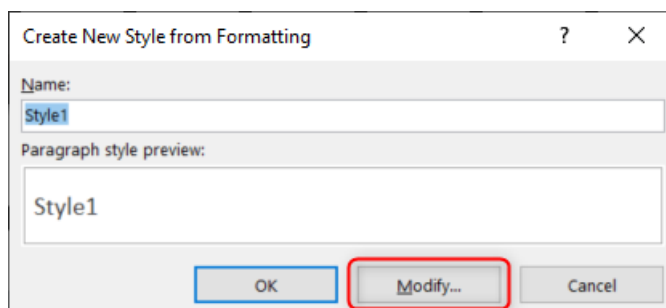
Create your own styles in Word

If any of the styles from the Word drop-down is not suitable for your choice, you can create your own style.

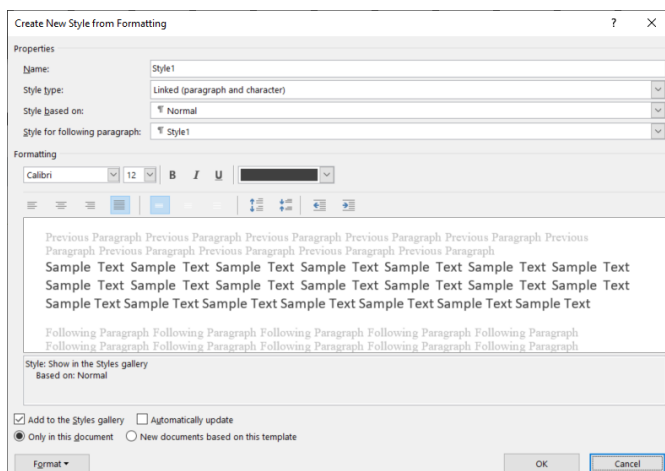
1. Go to the **Styles** panel in the **Home** tab in the Word ribbon and select **More button** to open a list with the **Create a Style** option.



2. Next step is to click **Modify** and customise the style however you like.



It opens the **Create New Style from Formatting** window where you can apply any styling to your newly created style.



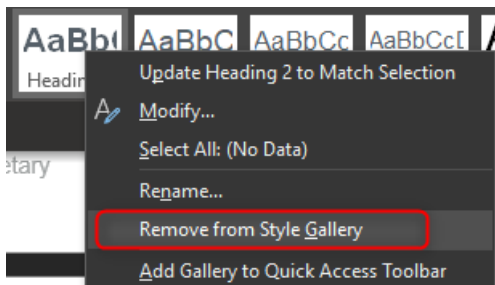
3. After you created your own style, you should see it added automatically in **Styles**.



Remove unused styles

Knowledge on how to create a new style allows you to remove unused styles and add new ones to edit the whole **Styles** panel.

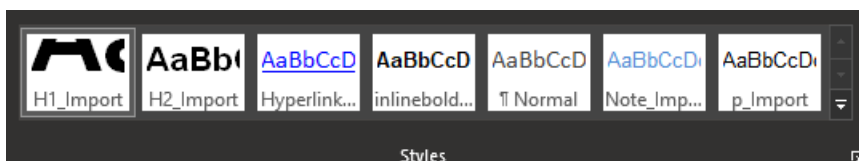
To remove one of the styles, right-click one of them and select **Remove from Style Gallery**.



Tip: Have in mind your styling table to make your working space more efficient.

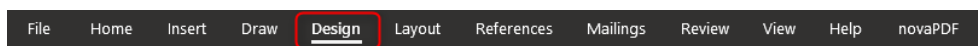
Save your workspace and re-use it

At this level, you should have your own styles table cleaned and prepared to work.



Now, you can save your styles template and import it if needed.

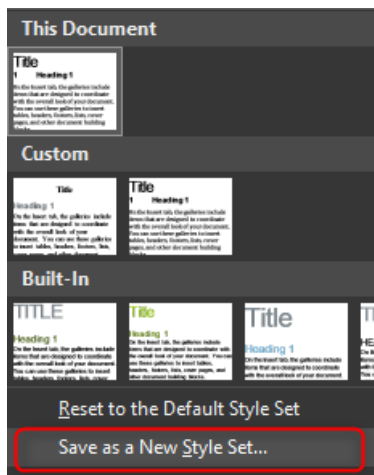
1. Go to the **Design** tab.



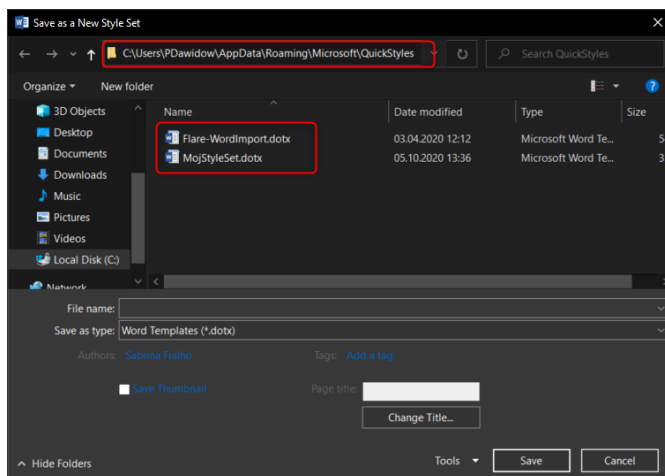
2. Open the drop-down list under the **Document Formatting** panel.



3. Click **Save as a New Style Set** to save your own styles environment.

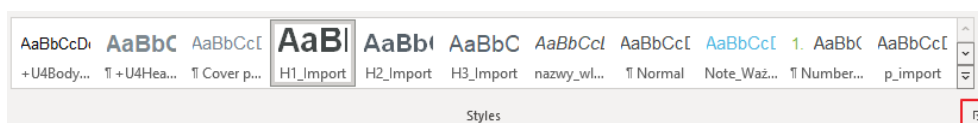


4. **Name** your custom style Set. You can find its path in your local. You can see newly created templates under the **Custom** tab.

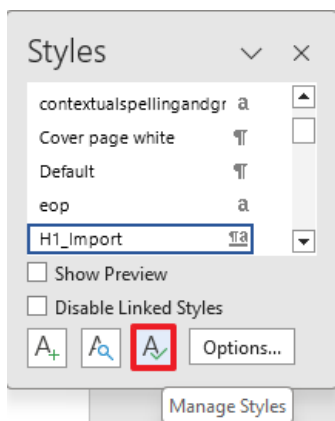


Apply your custom styles set into the next Word document

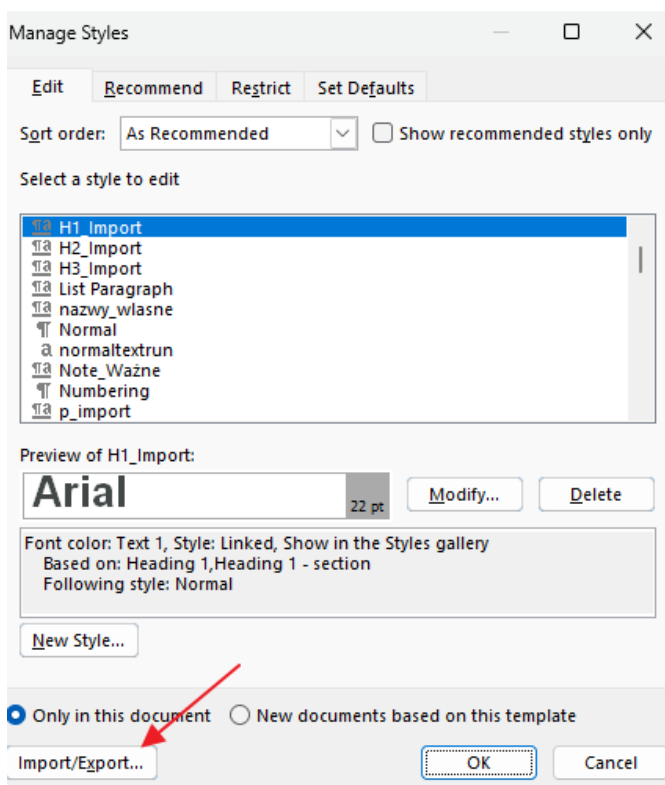
1. Open the styles panel from the **Home** tab:



2. Click the **Manage Styles** icon:



3. Click the **Import/Export** button that opens **Organizer**:



4. Copy your custom styles into the embedded styles. They appear in the **Styles** ribbon of the Word document automatically.

3.2 Pre-import clean-up

Cleaning up the document is the most time-consuming activity. At this moment, each style you decided to put into your project is going to be used. Every paragraph, heading, italics, etc. should be changed into one of your styles from the **Styles** tab.

Cleaning the document involves the following tasks, and is not limited to them:

- Using heading styles.
- Replacing inline styles with Word styles.
- Removing listings as numbering or bullet lists.
- Removing empty paragraphs and extra page breaks.
- Applying paragraph style to images.

After the work is done, the document might look less aesthetic but it is now more convenient for Flare to mirror the styles.

Analytic Widgets: Calculated Elements

Common understanding

Starting with version 10.6, it is possible to create basic calculations (sum, average, max, min) in analytic widgets for all visualization types. This analytics feature enhances the self-service BI capabilities of Unit4 Prevero dashboards. All users have access to personal dashboards, so anyone can pick a cube on which they have view permissions and carry out this type of analysis.

Use cases

A controller wants to forecast product sales in the middle of the year by summing up the actual figures and the budget values that have already been entered by each department. Create a public dashboard and an analytic widget. Then select the correct cube with a period containing actual and budget values and all data in the same measure. Drag **Period** onto the rows and **Business units** onto the columns.

period	business units	prevero gro...
ACT 2015 Jan	652.303.70	301.759.14
ACT 2015 Feb		
ACT 2015 Mar		

Click the column header of the period and filter out the empty future actuals and the past budget values.

period	business units	prevero gro...
ACT 2015 Jan	652.303.70	301.759.14
ACT 2015 Feb		
ACT 2015 Mar		

Create a sum for the rows.

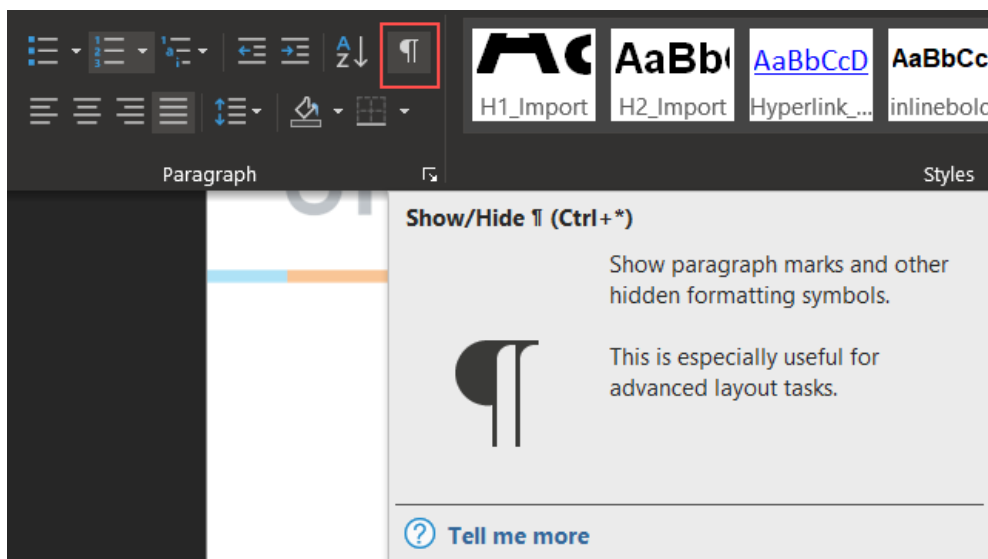
Figure 3-4: Prepared document for importing

3.3 Tips and tricks

This section provides some tips and tricks to speed up the manual work. You can use them no matter how advanced you are with Microsoft Word.

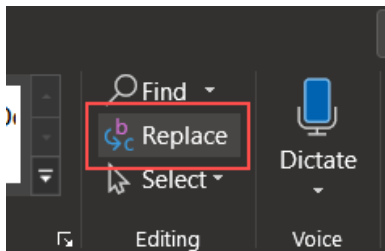
Show/Hide option

This option shows you paragraph marks and hidden formatting symbols. Turn it on to have a view on the actual formatting.



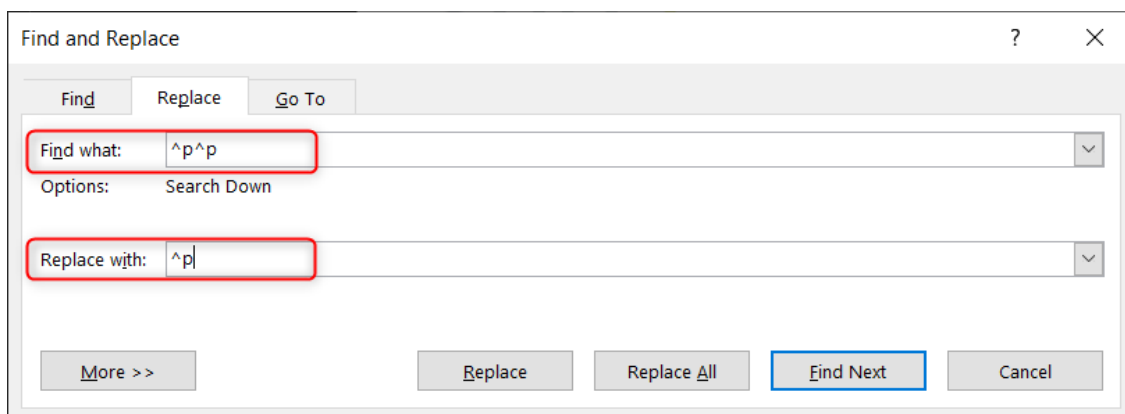
Find and Replace option

This powerful component enables you to make a change automatically in the entire document. You can open it directly from the **Home** tab or using a shortcut **CTRL+H**.



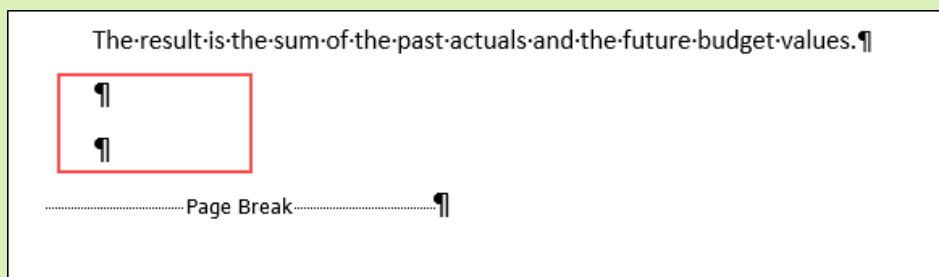
As you need to remove page breaks or the other formatting manually, you can use **Find and Replace**. As Flare does not read extra paragraph breaks, you can replace them with simple paragraphs:

- Use "**^p^p**" which are two paragraph breaks next to each other and replace them with only one.

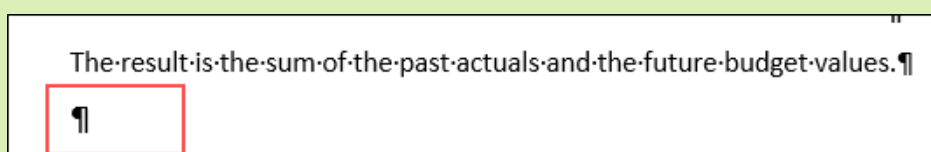


Example:

Before



After



- The table below includes the hardcoded strings used to replace different page or paragraph formatting:

Search String	Searches For
^l (lowercase L)	Manual line break
^p	Paragraph break
^n	Column break
^m	Manual page break
^b	Section break
^t	Tab character

Figure 3-5: Codes for formatting styles

Macros

Using macros in a Word document to replace styles can streamline your formatting tasks. The steps below describe how to create and use a macro for this purpose.

Step 1: Enable the Developer tab

1. In Microsoft Word, go to **File > Options**.
2. Select **Customize Ribbon**.
3. In the right panel, select the **Developer** tab. It will display in the main tabs in MS Word.

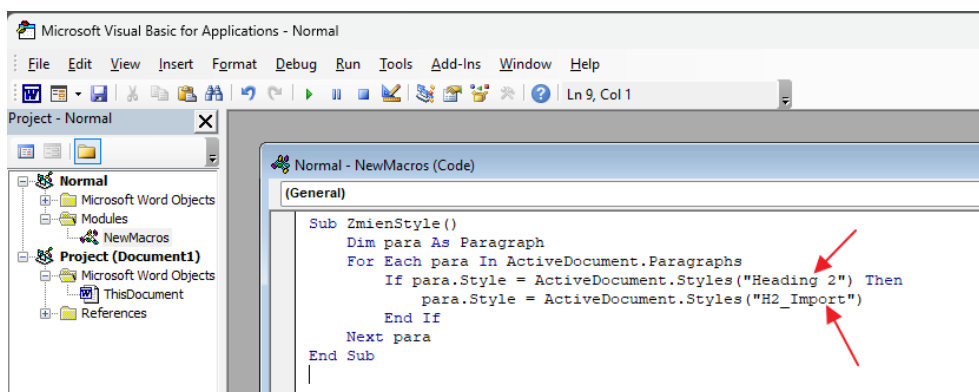
Step 2: Create a Macro manually

1. Go to the **Developer** tab.
2. Click **Macros**.

3. Create and name your macro.
4. In the Visual Basic for Applications (VBA) editor, you will see a code window. Paste there the following script:

```
Sub ReplaceStyles()  
Dim para As Paragraph  
For Each para In ActiveDocument.Paragraphs  
If para.Style = ActiveDocument.Styles("OldStyle") Then  
para.Style = ActiveDocument.Styles("NewStyle")  
End If  
Next para  
End Sub
```

5. In the *OldStyle* and *NewStyle* fields, select the styles you want to replace.



Step 3: Run the Macro

1. Close the VBA editor.
2. In Word, click on the **Developer** tab.
3. Click **Macros**.
4. Select your macro from the list and click **Run** or F5.

Tip: When you save the document, make sure to save it as a macro-enabled document (.docm) if you want to keep the macro for future use.

Tip: To avoid unintended changes, you can test your macro on a copy of your document.

4 Import

4.1 Before you start

Track your work progress

To help you track the importing files, you can create the Excel sheet to navigate through the process. Divide it into three stages: **Pre-Import**, **Import** and **Post-Import**, and keep it updated to see your work progress.

Title	Migration - Estimated effort (hours)	Migration - Actual effort (hours)	Migration completion date	Post-editing status	Post-editing - Estimated effort (hours)	Post-editing - Actual effort (hours)	Post-editing - completion date
Analytic attributes – import enhancements	1	1	31/8/2020	Completed	1	1	2/9/2020
Active Directory Synchronization	1	1	6/4/2020	Completed	1	1	2/9/2020

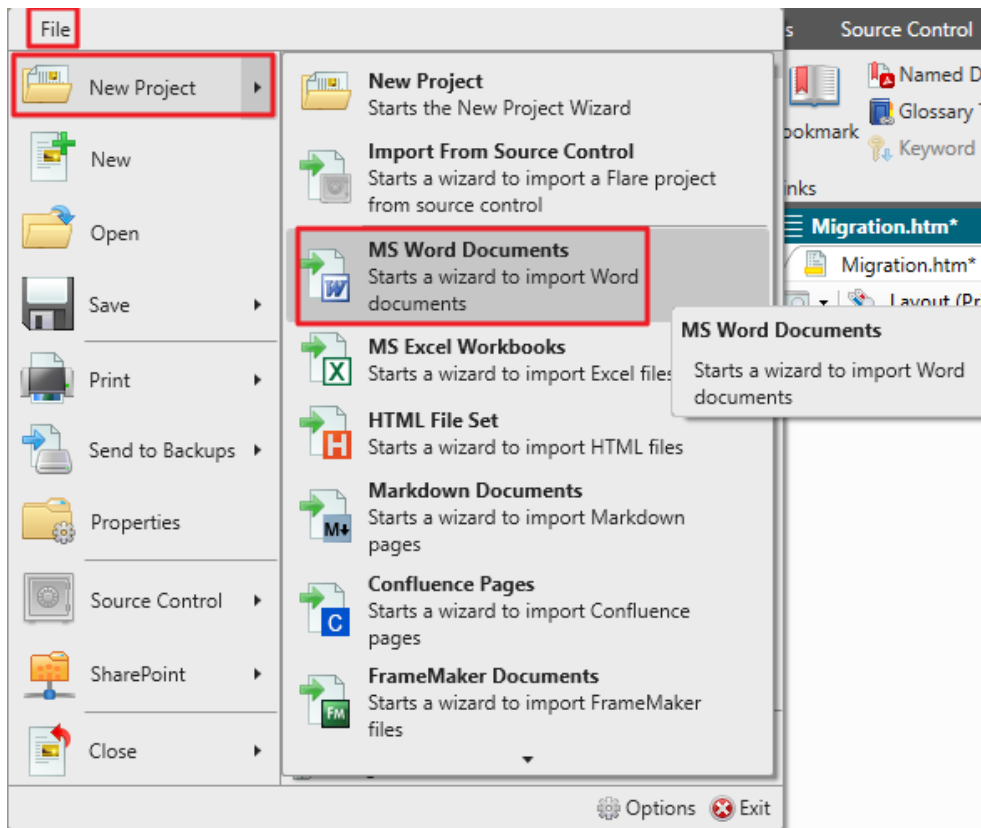
Figure 4-6: Example track-sheet table

Note: You can create your own Excel sheet or reuse the existing one. You will find it in the "Related resources" on page 28

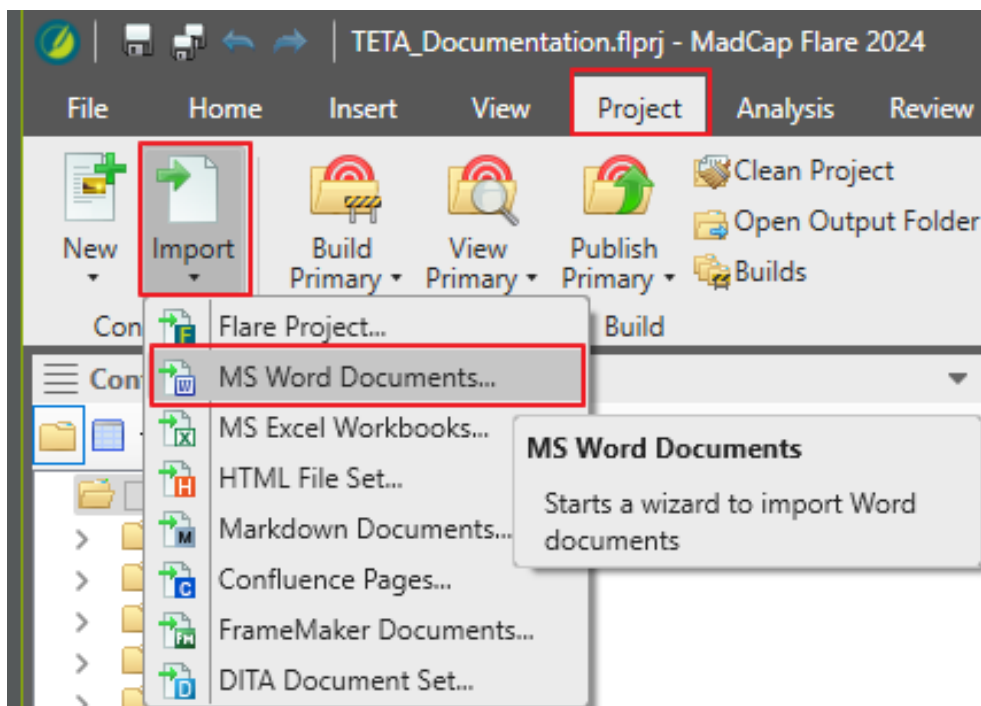
4.2 Start the import

There are several ways to start the import, including:

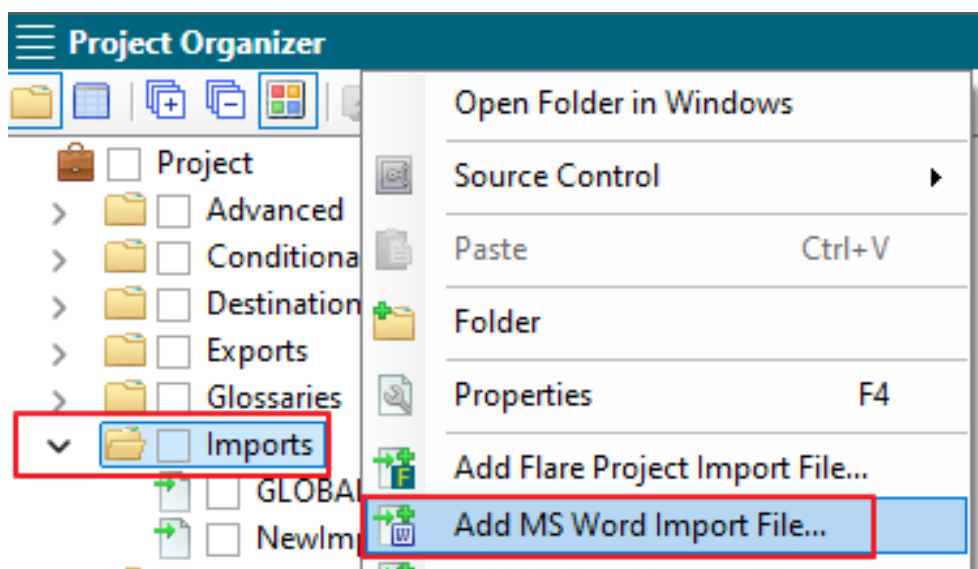
- Creating a new Flare project from Word documents: **File > New Project > MS Word Documents**.



- In an existing project: **Project tab > Import > MS Word documents**.



- In an existing project: **Project Organizer**, right-click on the **Imports** folder > **Add MS Word Import File**.



- Dragging and dropping a Word document from your local into Flare.

Note: No matter which method you select, this is a starting point. All the methods will locate the import in the **Imports** folder of the **Project Organizer** regardless of your selected method.

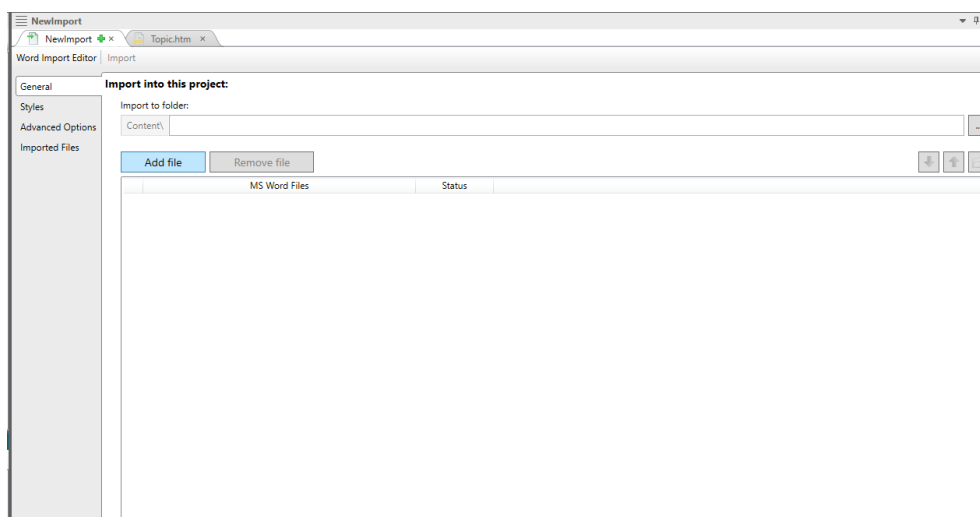
4.3 Configuration

There are several options that need to be configured correctly within **Word Import Editor** and **Import Microsoft Word Wizard**.

Set import options

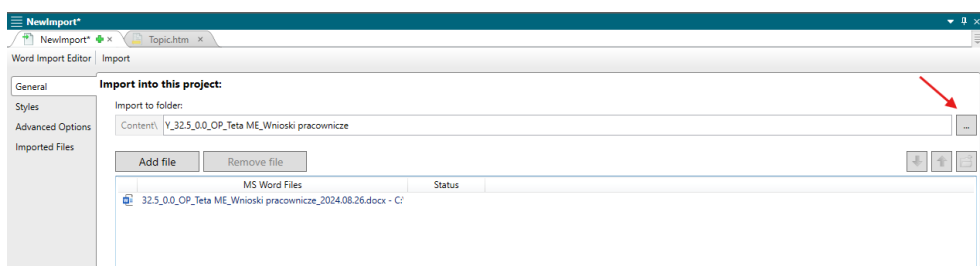
After you started the import, Flare opens the **Word Import Editor** that consists of four tabs:

- **General**
- **Styles**
- **Advanced Options**
- **Imported Files**



General tab

1. Select the folder in which you want to locate your content:



Note: You can import one or more MS Word files at the same time.

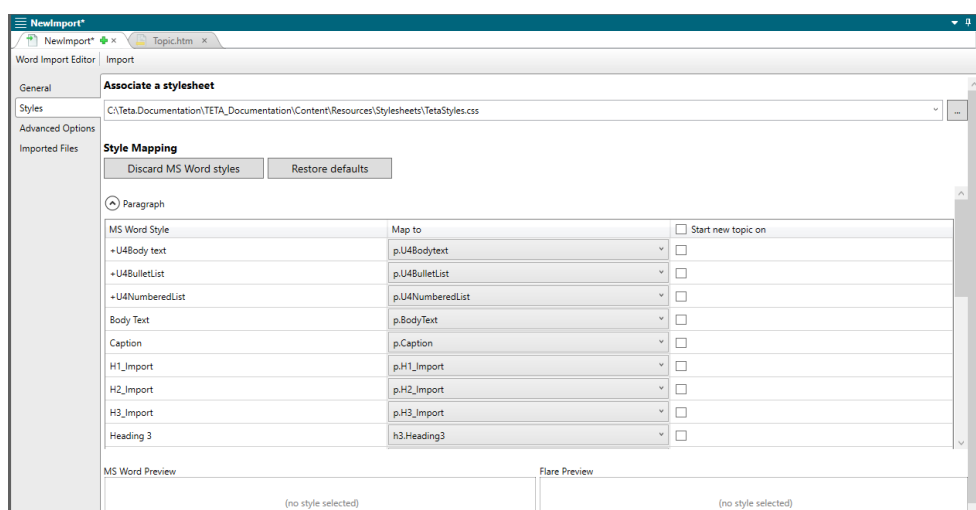
2. Proceed to the **Styles** tab.

Styles tab

In this tab you should map the styles from Word to those in Flare.

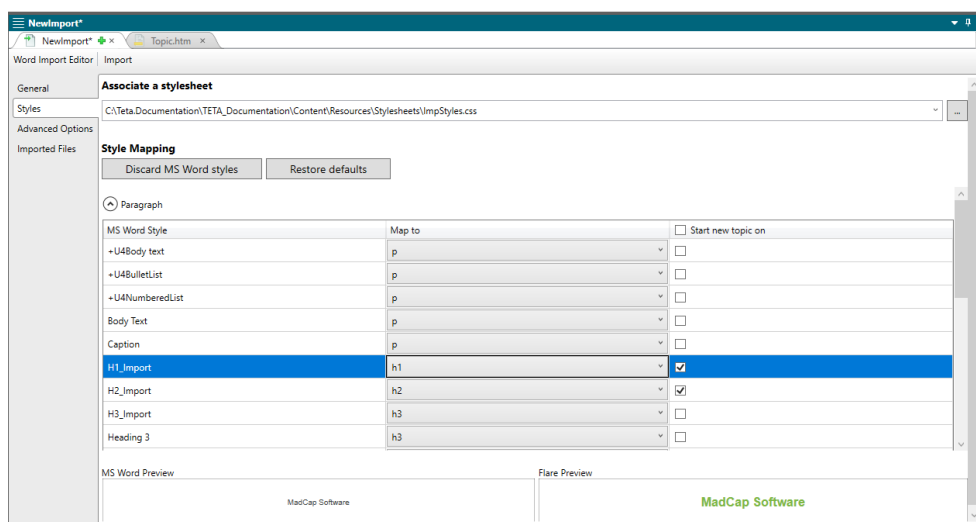
1. Select an existing stylesheet in the *Associate a stylesheet* field that contains Global styles or customised styles you want to map to.

Tip: If you use the **Global stylesheet**, which may be your **Primary Stylesheet**, do not select it in the process. Instead, create a copy of it, rename it and select it in *Associate a stylesheet* field. In this way, you can avoid overwriting or unwanted changes. Once you specify a **Master Stylesheet** for your project, later on, this copy becomes redundant and can be easily deleted.



Warning: The import process may modify certain properties in the CSS code of the stylesheet used within the current project.

- Click **Discard MS Word styles** to not keep the Word styles or formatting.
- Using available drop-downs, map your Word styles to those in Flare:



- In **Start new topic on** field, select all headings (heading 1, heading 2) that will divide the document into topics.

Tip: You can preview the styles in the **Preview** windows at the bottom.

- Proceed to **Advanced Options**.

Advanced Options

This tab allows you to control the key aspects of the import process.

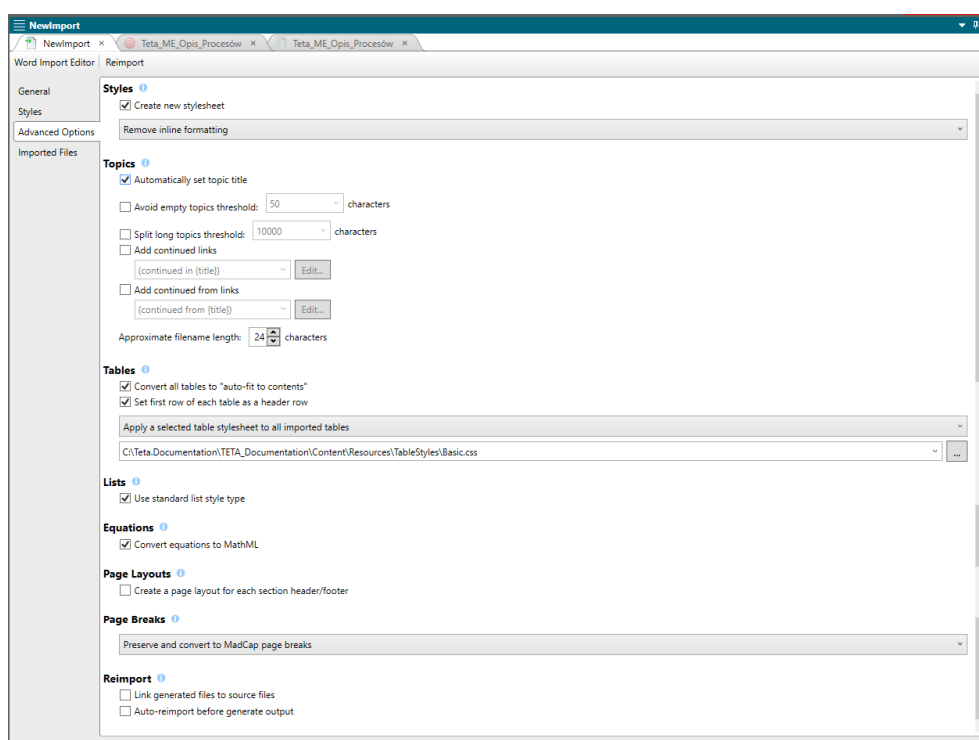
- Select the following options:

UNIT4

- **Create new stylesheet** as Flare may modify the project's existing stylesheet. You can delete it after the import is finished.
- **Remove inline formatting** this option cleans the tags in the imported topics.
- **Automatically set topic title** this option sets the topic automatically to the first heading.
- **Tables:**
 - **Convert all tables to "auto-fit to contents"** this option removes the width property from the table.
 - **Set first row of each table as a header row** this option sets the header row of the table.
 - **Convert table styles to Flare table styles** this option creates a table stylesheet in Flare.

Note: As an alternative, you can select *Apply a table stylesheet to all imported tables* option from the drop-down and link the required table stylesheet. But it is easier to apply a table stylesheet to the tables in all the imported topics by using the **Apply Style** button in the **Table Style Editor**.

- **Use standard list style type** this means standard bullet lists or numbering
- **Convert equations to MathML** if MS Word files contain equations and you want to convert them from the format used in Word to Flare standard.
- **Page layouts:**
 - Select the option **Create a page layout for each section header/footer** if you want Flare to create new page layouts.
- **Page breaks:**
 - Select **Preserve and create new topics on page breaks** if you want to keep any page break found in MS Word.
 - Select **Preserve and convert to MadCap page breaks** if you want to convert the page breaks from Word to the special tags used by Flare.
- **Reimport:**
 - If you continue working and editing the Word document, you can select the option **Link generated files to source files**. It provides the connection between the Word document and your imported files so you can reimport as needed.



2. Click **Import/Finish**.

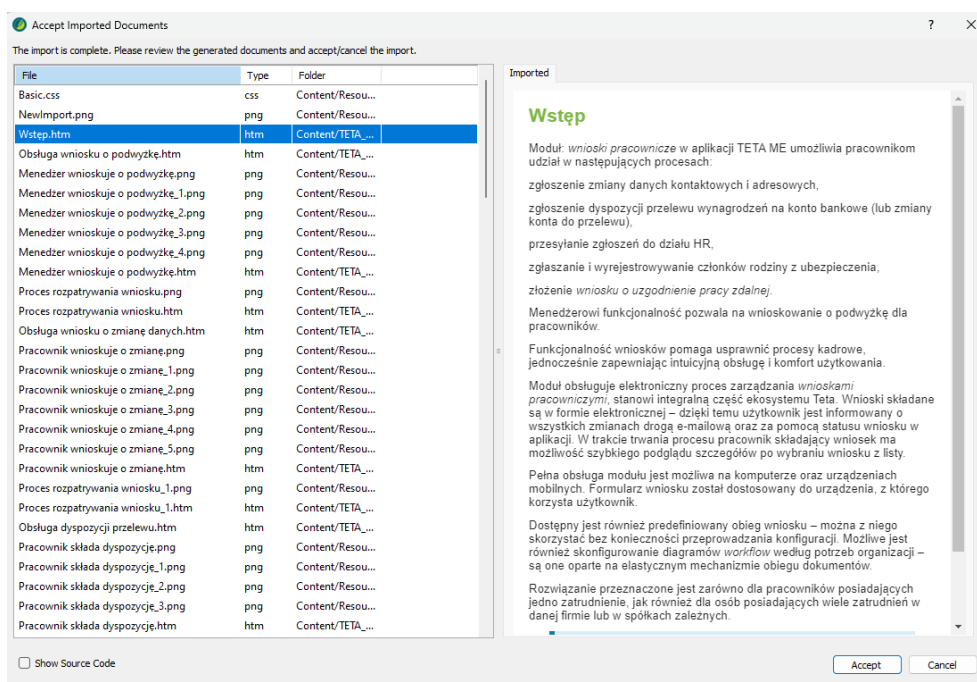
Note: If you dragged and dropped the MS Word file, there might be a difference in how the window looks. However, the configuration is the same. Instead of the **Import** button, click **Finish** to complete the import.

Imported Files

In this tab you can find all the files that you imported.

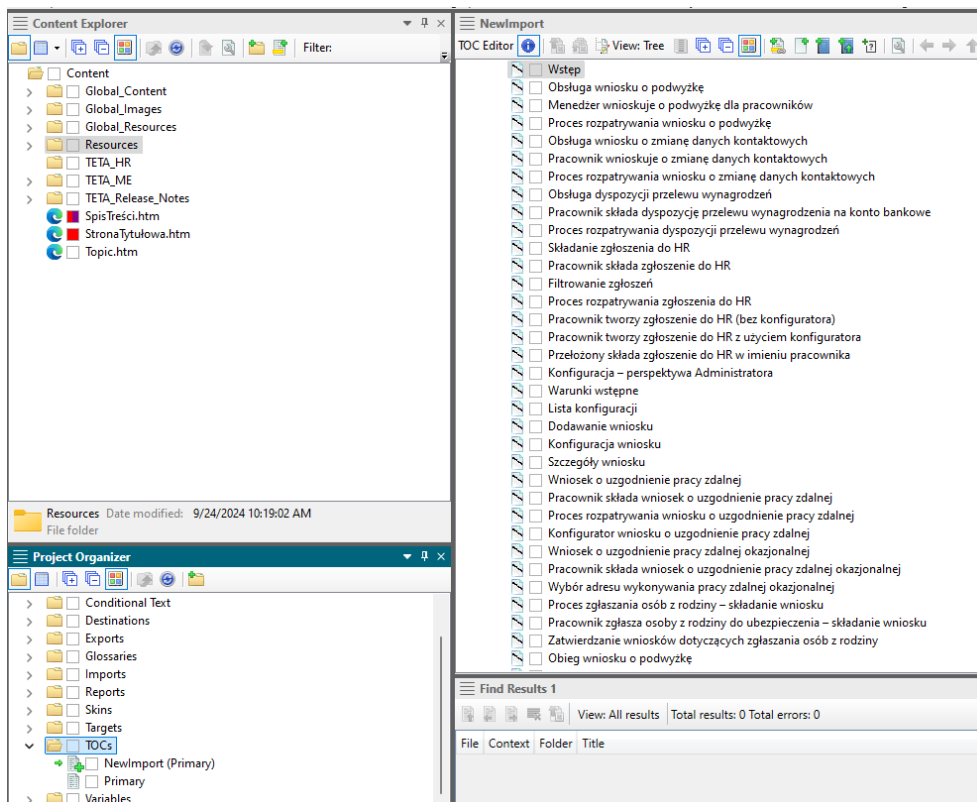
Accept imported documents

After the import is finished you are asked to review and accept the imported documents.



Note: You can also take a look at the source code that allows you to check the formatting in the code.

After you accept the files, you can open all the topics and imported TOC:



5 Post-Import Editing

5.1 Post-import tasks

In the **Pre-import** stage, you probably cleaned up the Word document as much as possible. However, some of the styling from Word is left in Flare. Now is the time to check the imported document, apply the necessary formatting, and set the project properties.

Some of the post-import tasks include:

- Checking the content files.
- Applying single-sourcing tools.
- Setting the project properties and TOC.
- Deleting unused files.

Check the content files

Listings

As you removed as much formatting as possible in the Word source document, you need to restructure it manually in Flare. If you used multi-level lists, you can restore them in Flare using styles, numbering, bullet lists etc.

Images

Embedded images will be imported into **Resources > Images** in the **Content Explorer**. Their file names will be based on the topic name where the image is inserted. If any shape or callout was inserted in Word, it will not be imported to Flare. Commonly, images are also outsize or in the wrong position, so you can resize them as stated in the [Global style guide](#).

Tables

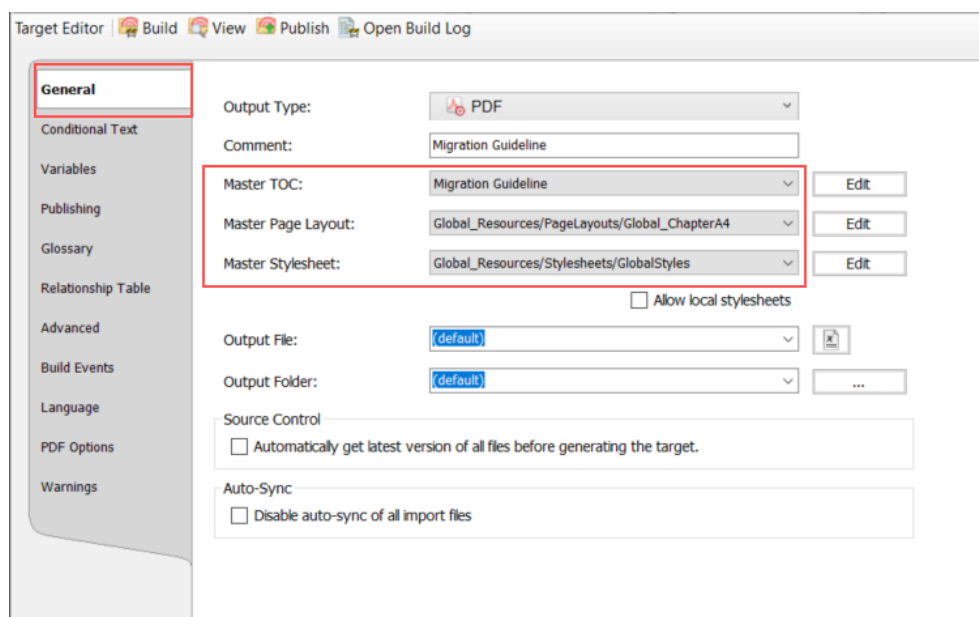
Check the tables for missing or corrupted formatting and apply the appropriate table styles from the Global styles.

Paragraphs

Check the formatting of all new topics and apply styles and spans where necessary. Reuse your content by using snippets, variables, conditions, etc.

Set the project properties and TOC

Imported TOC will contain all your topics. Add those topics to your Master TOC if you have already specified it. Apply relevant settings to your target output.



Delete unwanted files

Delete any unwanted files that were added to your project by the import process. This can be a newly added stylesheet, imported TOC, or unnecessary or wrong links to topics or images. Keep your project clean and organized.

Note: You will notice that imported topics are named as particular headings. Rename them to avoid spaces in the naming convention.

5.2 Autonumbering

Autonumbering is intended for print-based output. If you are producing output that is organized into chapters, sections or subsections, autonumbering provides the order based on the specific settings. Autonumbering is also useful with page numbers, captions or table headings. Global styles provide the style for autonumbering headings (H1, H2) but you need to specify how to generate the numbers in your content.

Create an auto number format

Autonumber format consists of a number of commands and counters that increment the numbers. The table below describes only chapter, section and volume numbers.

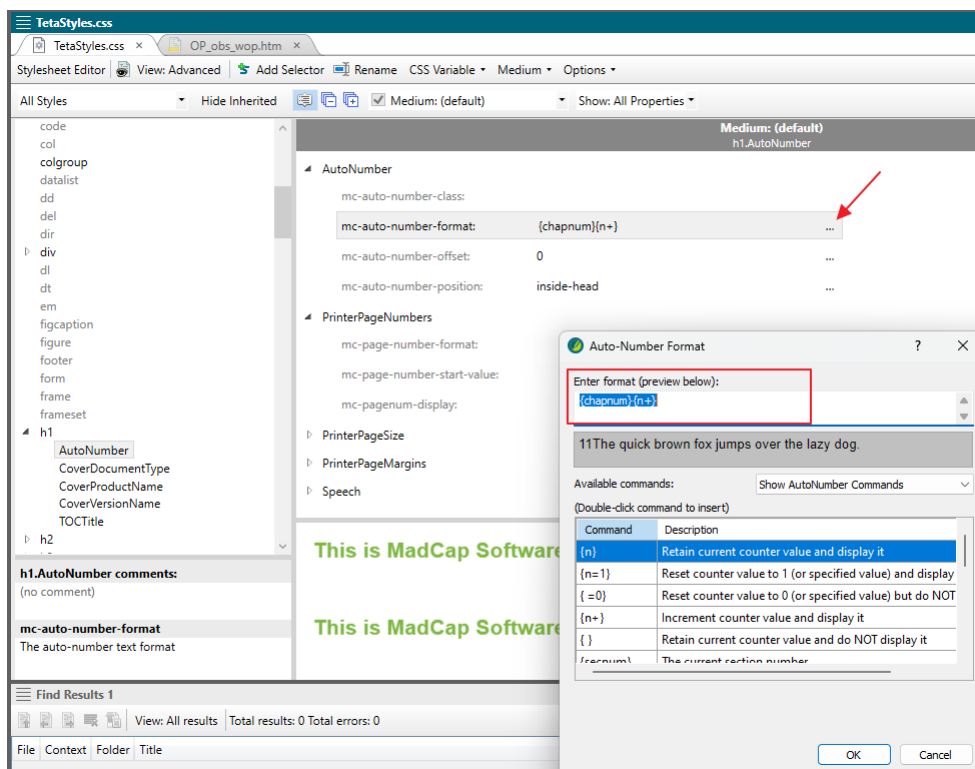
Commands

Autonumber format	Preview	Description
Chapter {chapnum}	Chapter 1 [Title]	Chapter number and title
Section {secnum}	Section 1[Title]	Section number and title

Volume {volnum}	Volume 1 [Title]	Volume number and title
Subheading {chapnum} {n+}	1.1, 1.2, 1.3	The first number is the chapter number, the second is incremented.

Despite the Global style for autonumbering being available, you need to specify the format of your command to display the numbers properly.

1. Open the autonumbering style in CSS.
2. Find **AutoNumber** > *mc-auto-number-format*.
3. In the **Auto-Number Format** window, select the command for a chapter or a section by double-clicking:

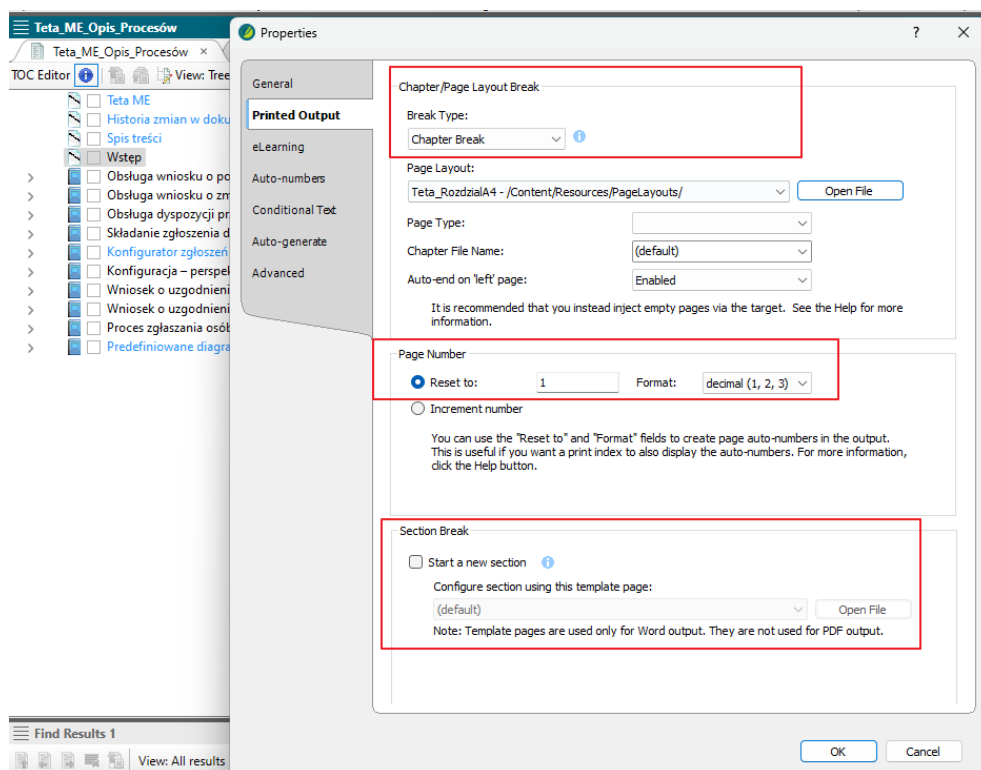


4. Click **OK** and save your changes.

Specify chapter breaks

After you create your format you need to enable Flare to increment the numbers based on the chapters or sections numbers.

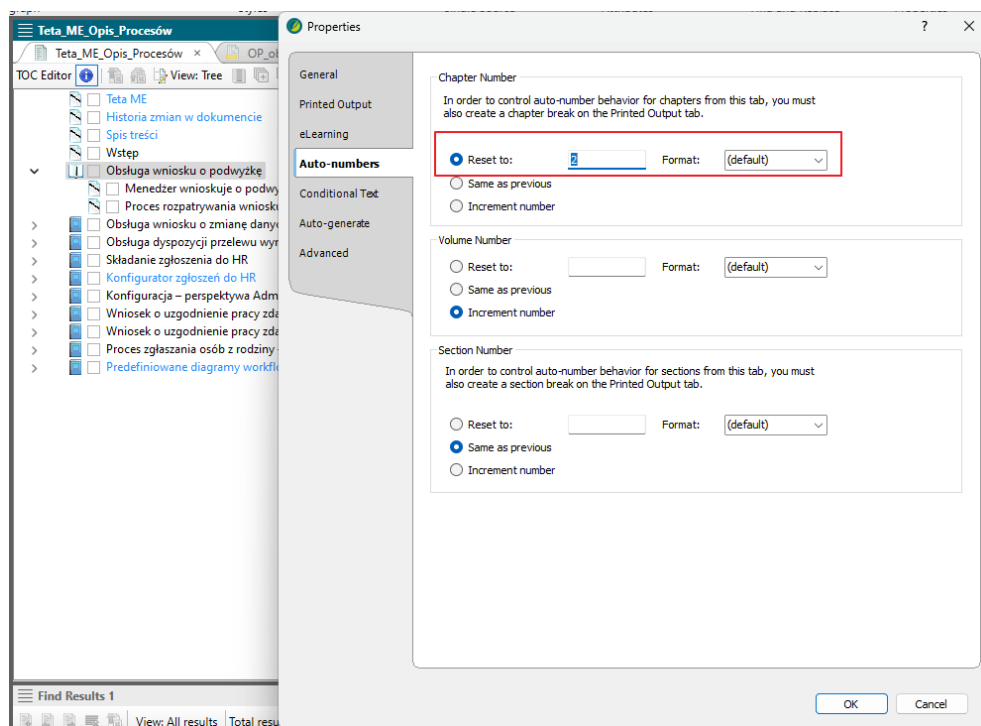
1. Go to **Project Organizer** and open your **TOC**.
2. By right-clicking, open the topic properties of your introductory topic.
3. Set the **Chapter Break** in the *Break Type* field and reset your page number to 1.



4. Click **OK**.

5. Open the properties of the next topic and select the **Auto-numbers** tab.

6. In the *Chapter Number* field, click **Reset to: 2**.



7. Click **OK** and save your changes.

Note: The numbering of the chapters and sections will be added automatically to the rest of your topics. In case the numbering did not generate correctly in the built TOC, recheck the topic properties and set the chapter break.

Build your target

After you build your target, you can check if autonumbering works correctly.

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Related documentation

If you want to find out more about autonumbering, please refer to [Autonumbering Guide](#).

6 Related resources

Articles

Refer to the following articles for further reading regarding import, its technical details, and steps:

- [Importing Word documents into Flare.](#)
- [Importing Word files.](#)

Attachments

Excel tracking sheet (as stated in "Pre-import clean-up" on page 10)