MadCap Flare for Beginners

Introduction

The following sections of this manual will provide you with the information needed to create and publish a project in MadCap Flare. This manual is meant to be an introduction to MadCap Flare and by no means covers the massive amount of features that this software contains. Possessing the knowledge contained in this manual will allow you to explore the more complicated areas MadCap Flare without getting confused with the procedures and terms in the software.

Key Terms

The following terms are important to know when working in MadCap Flare. The definitions of these terms and what function they serve are taken from various manuals published by MadCap Flare. Please familiarize yourself with these terms before reading the manual.

Snippet

Snippets are pre-set chunks of content that you can use in your project over and over. They are sort of like miniature topics and can be inserted within topics, or even within other topics. In snippets you can insert text, tables, images, and whatever else can be included in a normal topic.

The major benefit of using snippets is that you only have to create your content once, rather than having to type the same information in each topic where you want to use it. If you need to modify the content of a snippet, you only need to change it in one place and the change is made automatically everywhere that the snippet is added.

Topic

A topic is chunk of information about a particular subject. Topics are the most important part of a Flare project. Everything else is contained within topics (e.g., tables, text, images) or points toward topics (e.g., tables of contents, indexes). Topics are like documents that are only a few paragraphs long and only have information about a specific subject. When a project is published, all of the individual topics saved in a project are compiled.

Target

It is the engine that takes all of your files and settings, and brings them together to produce the end result. When you build your final output, you are essentially building one or more of the targets in your project. There are several different types of online output (, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, and WebHelp Plus) and several types of print-based output (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML) that you can produce in MadCap Flare.

Topic Based Authoring

In Flare the focus is on developing pieces of information (topics) that are useful to readers, rather than focusing on creating one enormous document. In other words, you can first focus on the content and later worry about how it should be delivered to users; the two concepts are separate. After you are finished creating topics, you can send them out individually for review (another benefit of small topics), and when the review process is finished, you can decide how to use the topics in the output. Topic based authoring allows you to incorporate single-source features in your project, meaning that the different topics in a project are all stored in a single location.

Variable

Variables are pre-set terms that you can use in your project over and over. They are stored in variable sets, which can hold multiple variables. Depending on the template you select when creating a project, Flare may provide you with an initial variable set, but you can add as many additional variable sets as you like.

Variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number). There are different kinds of variables: (1) basic ones that you create, (2) custom date/time variables that you create, (3) system variables (e.g., date and time; titles; page count; Chapter, Section, and Volume numbers), (4) Heading variables, and (5) Running Head variables. Some of these are especially useful for page headers and footers in print-based output.

XML Editor

The XML Editor is the primary editor that is used in Flare. It provides access to the underlying XML structure of documents in a comfortable visual authoring environment. This editor is used to enter, modify, and format the content for topics that users see in the output. Not only is this editor used for topics, but it is also used for working with master pages and snippets. Although this editor lets you produce XML files, you do not need to know anything about XML to use it.

MadCap Flare Interface

MadCap flare has a highly customizable interface which can be altered to suit the needs of the user. The windows and sidebars can be made smaller or larger to view less or more content, or they can be hidden altogether by closing out of them. This manual uses the default layout. In the default layout, there is:

- A Ribbon at the top of the screen (1)
- A sidebar on the left side of the screen that allows access to the Content Explorer and the Project Organizer (2)
- A window on the right side of the screen that is primarily used to view/edit topics in the XML or text editor, but is also where any other functions take place such as editing stylesheets, table of contents or reading information from articles in the Help menu (3)
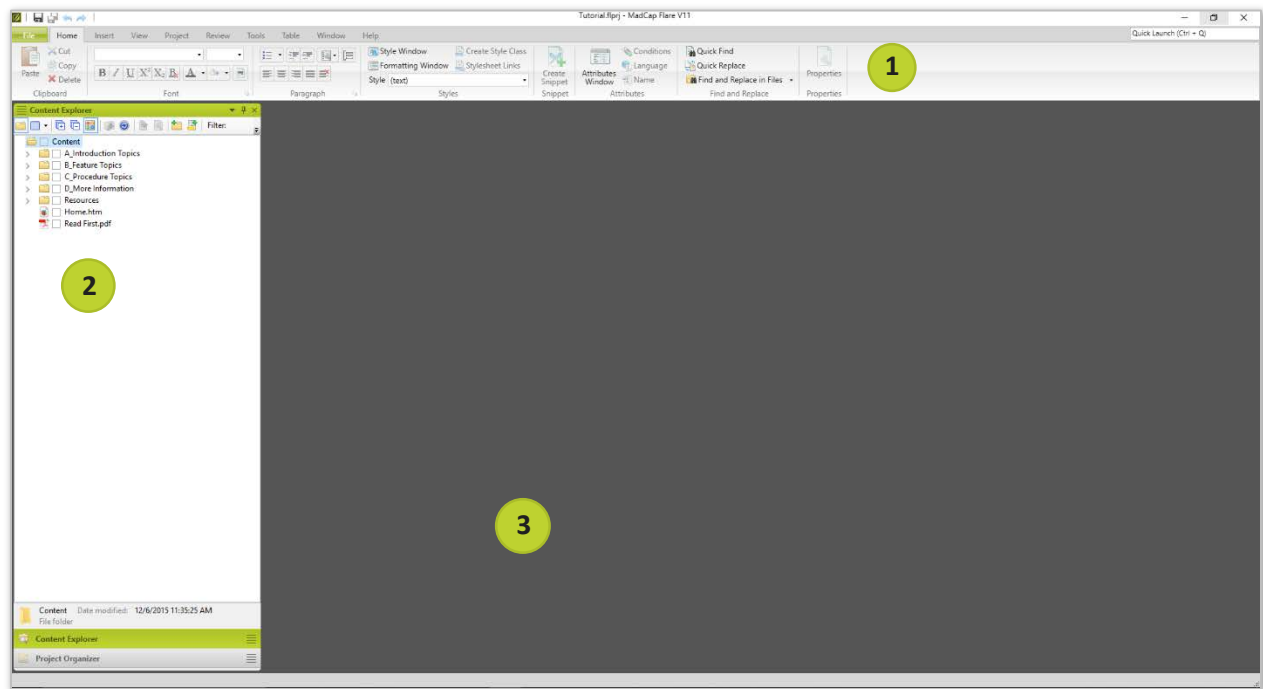
Saving and Using a Custom Layout

After changing the layout:

1. Click **Window>Save Layout** on the Ribbon

When you open up MadCap Flare next:

2. Click **Window> Layout** on the ribbon
3. Select your saved layout.

Ribbon

The Ribbon is an important part of MadCap Flare's interface, it provides access to nine different ribbon menus that you will most likely need while using the software. Since each ribbon menu contains multiple tools within it, this manual will not cover each one in depth. There are a couple of menus that are important for beginners to be familiar with.


Home

The Home menu is the default menu that appears on the ribbon. It has a Clipboard, Font, Paragraph and Attributes section. The Clipboard, Font and Paragraph sections have standard features that are similar to the sections on the Microsoft Word Home Ribbon. The Attributes section has one key feature that is unique to MadCap Flare, that being the ability to create a Snippet.

Creating a Snippet

1. *Select* the content that you want to use as your snippet
2. *Click* the **Snippet** button in the Attributes section of the Home Ribbon
3. *Type* the name of your snippet in the Snippet File field
4. *Select* where you want to save your snippet in the Project Folder field
5. *Click* **Create**
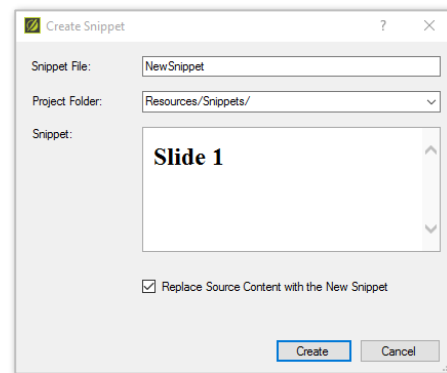
Project

The Project Ribbon contains features that are essential in the composition, transportation and completion of a project. It allows you to import documents from other programs so that you can edit them and add them to your MadCap Flare project. This ribbon also allows you to build your project so you can view and edit it.

Importing Documents into Flare

1. *Click* the **Import** button in the Content section of the Project Ribbon
2. *Select* the type of file you want to import into flare.
   - The available file that you can import are:
     - ◊ Microsoft Word and FrameMaker documents
     - ◊ DITA and HTML document/file sets
     - ◊ Flare projects
3. *Select* where you want to import the content into your project
4. *Click* **Next**
5. *Select* the files you want to add to your project
6. *Click* **Next**
7. *Select* the Styles you want to import with the document
8. *Click* **Finish**
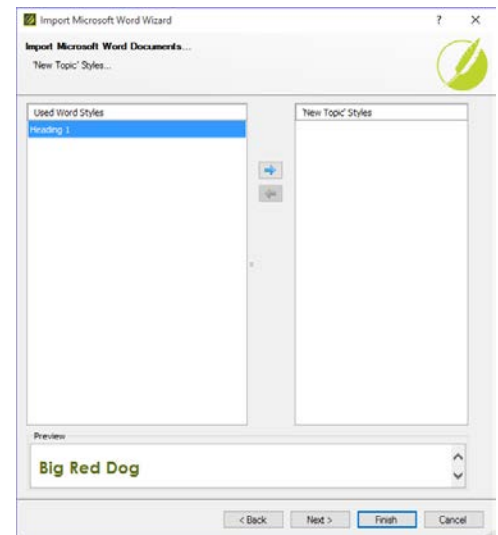
Building a Project

A project has to be "built" before it can be viewed or published. Building a project takes all of the topic files and any other content included in your project and outputs the files in the target file type. To build a project, *click* **Build Project**.

Viewing a Project

If you have built your project already, you can *click* the **View Primary** button to open your project in a new window. This is useful because you can see what your project will actually look like when it is published. If you your output is HTML5 you can look at the website you created online, if your output is set to be a PDF you will be able to view your document in Adobe Acrobat etc.

Publishing a Project

Once you have viewed your project and are ready to publish it, *click* the **Publish Primary** button. If changes have been made to the project since the last time it was built, a message will pop up informing you that the current output is out of date and will ask if you want to regenerate it. *Click* **Yes** and your project will be rebuilt to accommodate any changes and will then be published.

Zipping a Project

Zipping a project is important when sending files or moving them to work on at a different computer. Since MadCap Projects are stored in multiple folders, it is best to zip all of the folders up into one folder. *Click* **Zip Project** in the Save section of the Project Ribbon

1. *Choose* to either **Zip Project** or to **Zip and Email Project**
2. *Choose* where to save the zip file
3. *Click* **Create**

Sidebar

Content Explorer

By default, the sidebar has the Content Explorer open and shows all of the files you have associated with your project. These can be topic files, images, stylesheets, page layouts, snippets etc. In the Content Explorer you are also able to add topics to a project and folders to hold your files.

Adding a Topic

1. *Click* the **Create New Topic** button ( ) on the row of buttons at the top of the Content Explorer.
2. *Select* a template for your topic
3. *Insert* a name for the topic file in the File Name field
4. (Optional) *Insert* a name in the 1st Heading and Title fields
5. (Optional) *Select* a Stylesheet and Style for the topic
6. *Click* **Add**
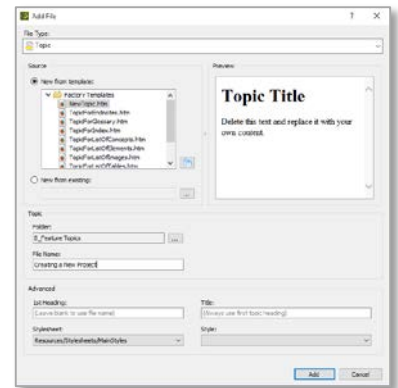
Adding a Folder

Folders are useful for organizing your content when you have a lot of topics. *Click* the **Create New Folder** button ( ) on the row of buttons at the top of the Content Explorer.

Expanding and Collapsing All Folders

To view all of the contents of all of folders in the Content Explorer, *click* the **Expand All** button ( ). To show just the folders without their contents, *click* the **Collapse Al**l button ( )

Opening a File

A file can be opened by *double clicking* the file name or by selecting a file and *clicking* the **Open** button ( ).
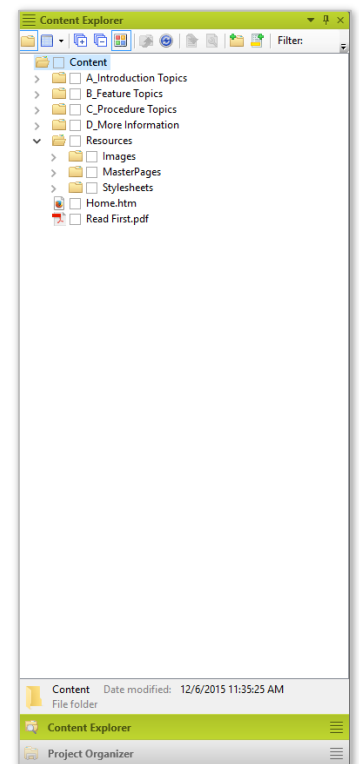
Work Window

Changing Layout

The layout of a project can be changed in the work window by clicking the **Layout** button on the toolbar inside the XML editor. When you switch between Web Layout mode and Print Layout mode, the medium automatically changes with it ("default" medium for Web Layout mode and "print" medium for Print Layout mode). This means that the editor will show the content in the style associated with that medium. Changing the layout allows you to view your how your project looks in print or web format. It is important to make sure you are working in the appopriate layout that corresponds with your Primary Target.

## Web Layout
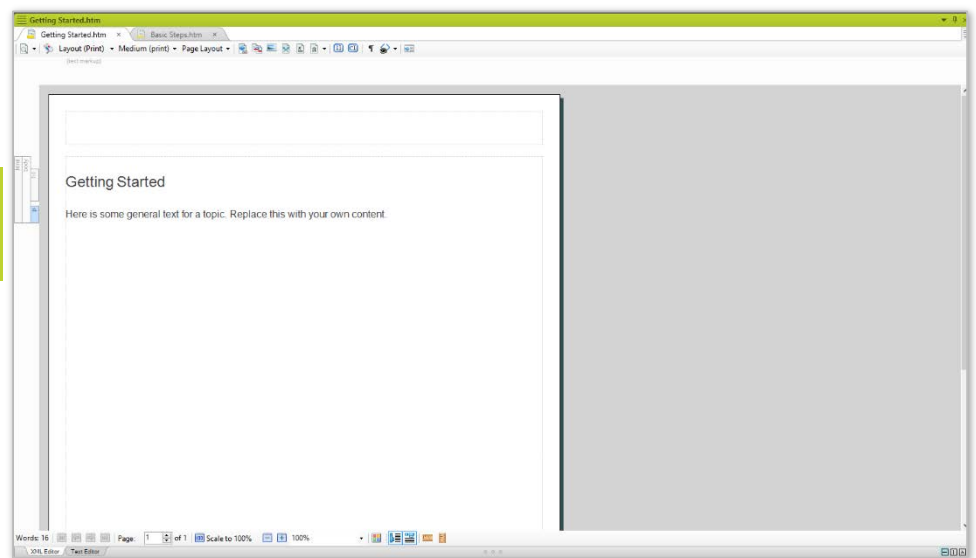
Print Layout
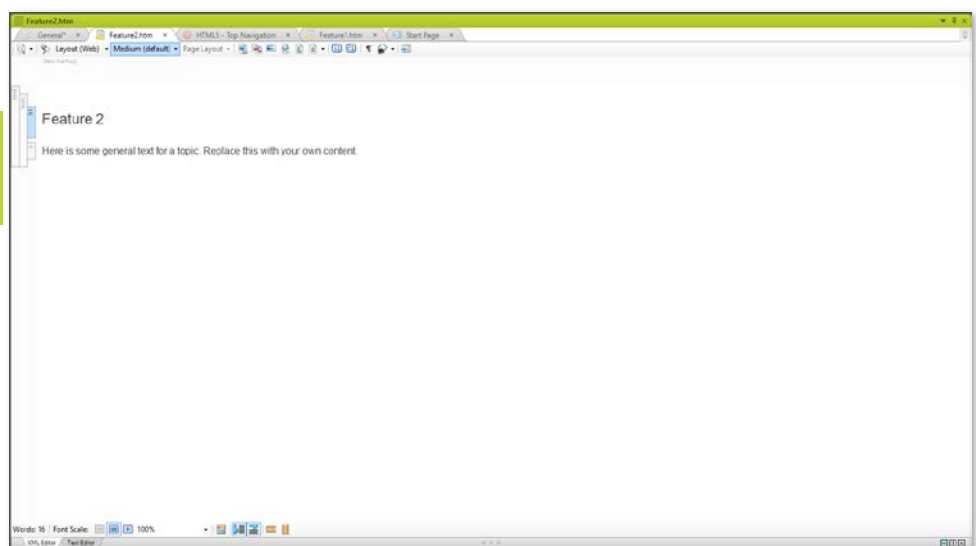
Inserting a Hyperlink

1. *Click* the **Insert Hyperlink** button (🖼)
   - The Insert Hyperlink window will popup
2. *Select* what you want your hyperlink to link to
   - A hyperlink can link to a file in your project, a place in your document, a website, email, an external file or an HTML help file.
3. Depending on where you are linking to, either *insert* the URL of the website, the location of the file or the email address you want to create a hyperlink to
4. *Insert* the what you want your hyperlink to say in the Link Text field
5. *Click* **OK**
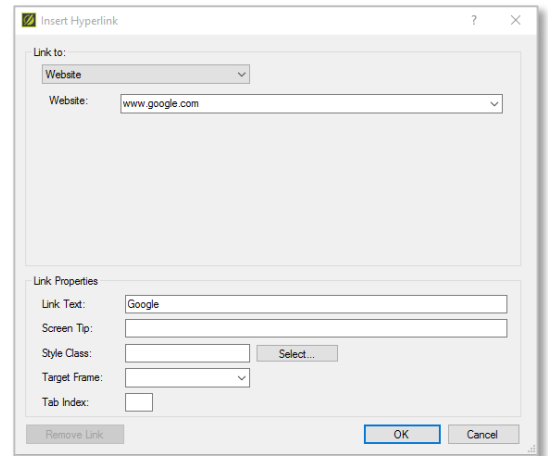
Inserting a Picture

1. *Click* the **Insert Picture** button (🖼)
   - The Insert Image window will popup
2. *Click* the [...] button to browse your computer for the image you want to insert
3. *Click* on the image file you want to insert
4. *Click* **Open**
   - You will be returned to the Insert Image window where you can see a preview of the image selected.
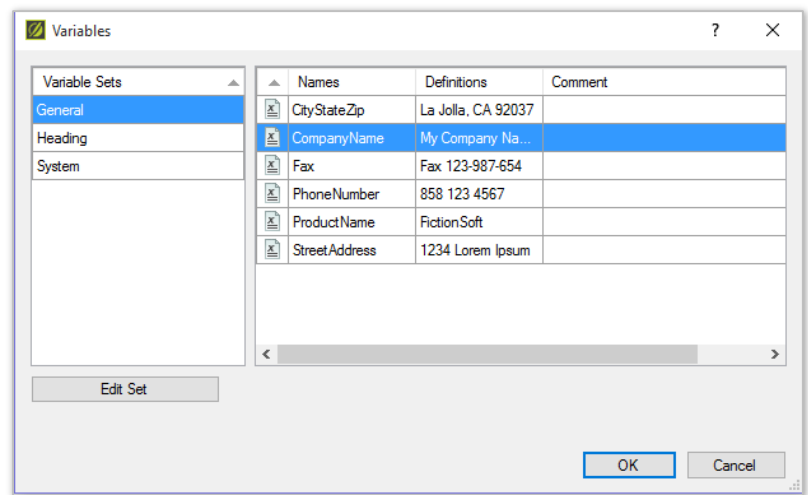5. *Click* **OK**
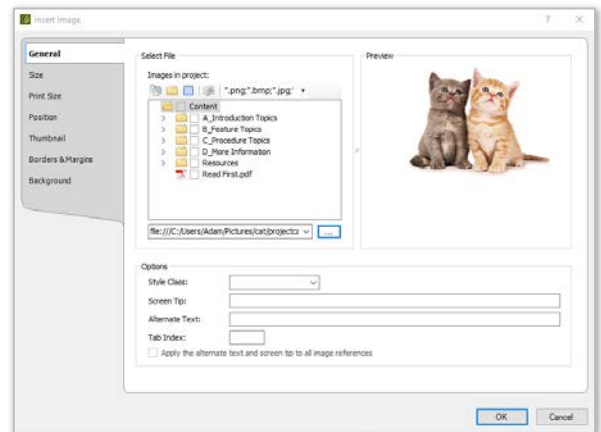
Inserting a Variable

To add a variable to your topic:

1. *Click* the **Insert Variable** button (🖼)
2. Select a variable
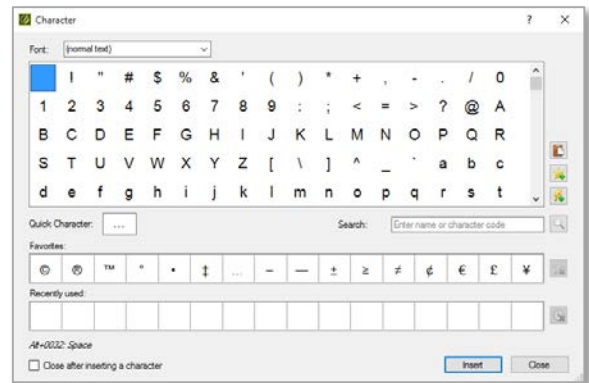
If you want to edit a variable:

1. *Click* **Edit Set**
2. On the page that opens, *double click* a section you want to edit
3. *Save* any changes and *close* the variable page
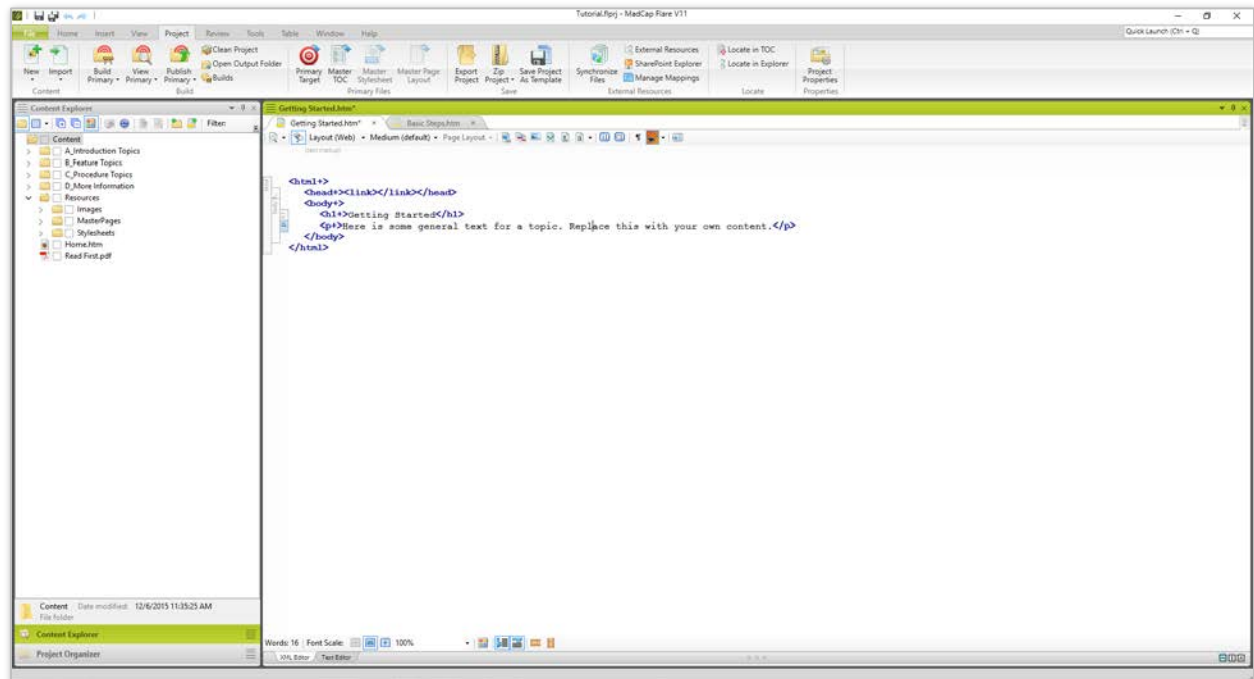
Inserting Characters

To insert a character:

1. *Click* the **Insert Character** button ( )
2. Select the character you want to insert in your project
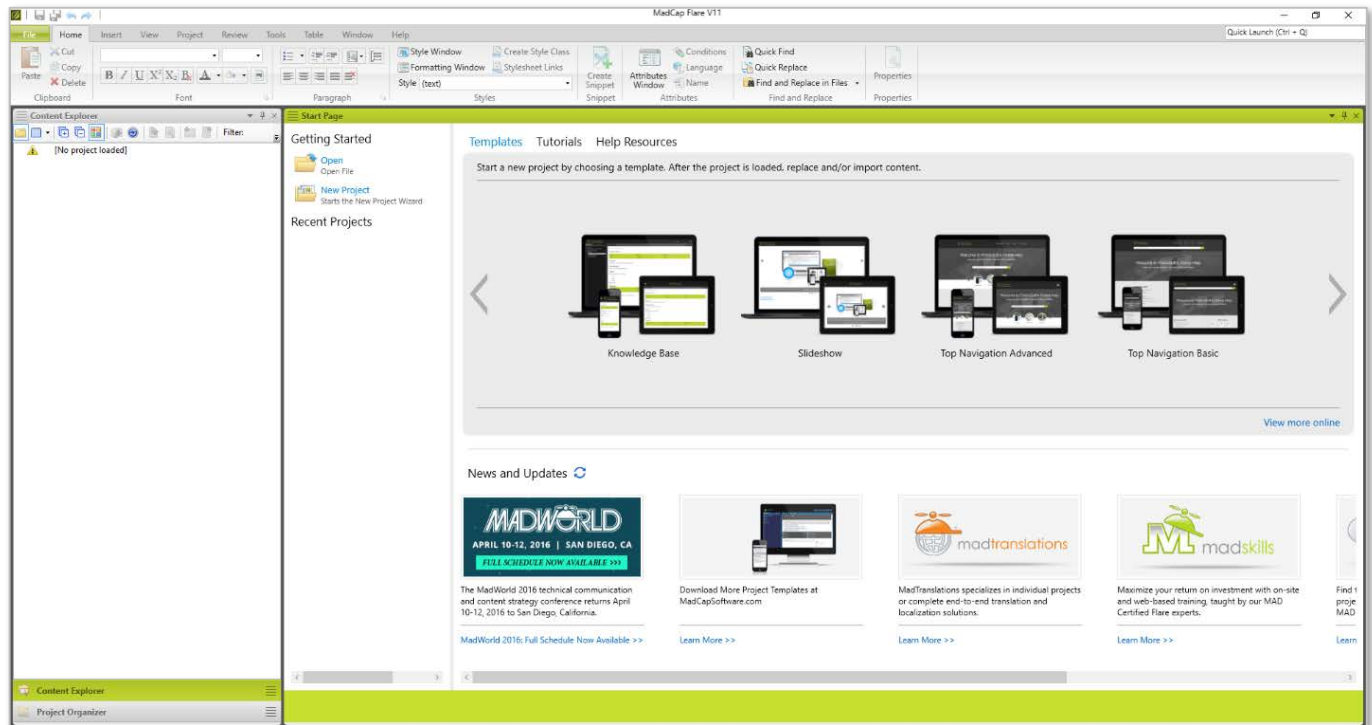3. *Click* **Insert**

Showing Tags

To view how a topic is structured using HTML tags, *click* the **Show Tags** button ( ).

Creating a New Project

When MadCap Flare is opened, the following screen will appear by default:

1. On the Start Page, *click* the **New Project** button under Getting Started
   - The Start New Project Wizard will popup
2. *Type* the name of your project in the Project Name field
3. *Click* the [...] button to *select* the location where your project will be saved
4. *Select* a language for your project from the dropdown menu
5. *Click* **Next**
6. In the Source area, *select* a template
   - There are 3 categories of templates that differ based on how you plan to output your project. The categories are, Online, Print, and Online and Print.
   - You can click on the title of a template to view a description that tells the features and intended use of the template
7. *Click* **Next**
8. *Select* the target of your project from the **Available Targets** dropdown menu.
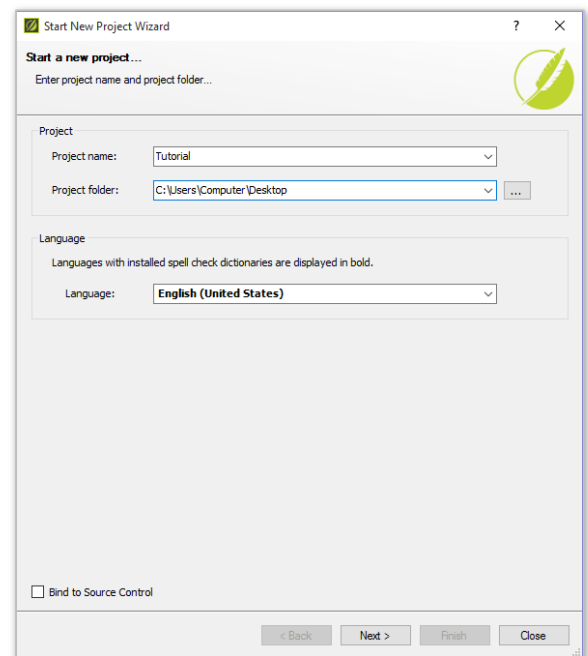
- The type of targets available for selection depend on the type of template you selected
- When you select a target, a summary of the target will appear in the box below your selection.

9. *Click* **Finish**

Saving a Project

MadCap Flare projects are saved as .FLPRJ files. The content that is used in the project (e.g. topics, snippets, images) is all saved as individual files that reside in subfolders inside your main project folder. Projects are not saved all at once in MadCap, instead each file you work on has to be saved before closing the individual file (or the application). If all of your files are saved when you exit MadCap, they will be loaded whenever you open the .FLPRJ file next. To save a file in MadCap, click **File**>S**ave** and the file will be saved to its home folder.

Additional Help

MadCap has a Help section on the Ribbon that is very helpful and provides comprehensive guides and explanations for every facet of the program. To access this knowledge base, *click* **Help** on the Ribbon. From here, you can use the following features:

- Search: Locate a specific subject that you need help with or want more information on.
- Favorites: Browse through any help articles that you have marked as a favorite
- Glossary: Look up the definitions of key terms used in MadCap Flare
- PDF Guides: Download free PDF guides that comprehensively explain processes
- Video Tutorials: Watch free video tutorials
- Help Community: Access an internet forum dedicated to helping users with MadCap Flare

With this manual and the information provided by MadCap Flare, you can learn to master this software,

The following sections of this manual will provide you with the information needed to create and publish a project in MadCap Flare. This manual is meant to be an introduction to MadCap Flare and by no means covers the massive amount of features that this software contains. Possessing the knowledge contained in this manual will allow you to explore the more complicated areas MadCap Flare without getting confused with the procedures and terms in the software.