MadCap Flare –
An Introduction to Topic Based Authoring: (Part 1)

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Slides

Slides are available on Mike's blog at:

http://madcapsoftware2.wordpress.com

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Agenda

- Welcome/introductions
- Load files on laptops
- Skill survey
- Definitions
- Flare overview – Architecture and differences
- Flare interface tour
- New project guidelines
- Creating projects – Frame/Word/Robo/Template/ DITA
- Adding content to existing projects – New Topics/ Word/Frame/DITA/media
- Primary Navigation
  - TOC/Index/Search

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Terms and Definitions

Terminology

- Topic-based authoring
- Single-sourcing
- Multi-channel publishing
- XML
- Project

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Topic-based authoring

From Wikipedia, the free encyclopedia

Topic-based authoring is a modular content creation approach (popular in the technical publications and documentation arenas) that supports XML content reuse, content management, and makes the dynamic assembly of personalized information possible.

A topic is a discrete piece of content that is about a specific subject, has an identifiable purpose, and can stand alone (does not need to be presented in context for the end-user to make sense of the content). Topics are also reusable. They can, when constructed properly (without reliance on other content for its meaning), be reused in any context anywhere needed.

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Single-source publishing

From STC publication Beyond the Buzzword: Single-sourcing, Sean Brierly

Single sourcing is a documentation workflow that creates multiple deliverables from one unmodified source document - that is, in the process of creating the deliverables, the source document is not edited or modified.

If you produce multiple deliverables that share some of the same **content**, single sourcing can reduce the resources in time and staff you need to produce them. Single sourcing really begins to shine when it's time to edit and update the deliverables, because all the changes can be made to a single document.

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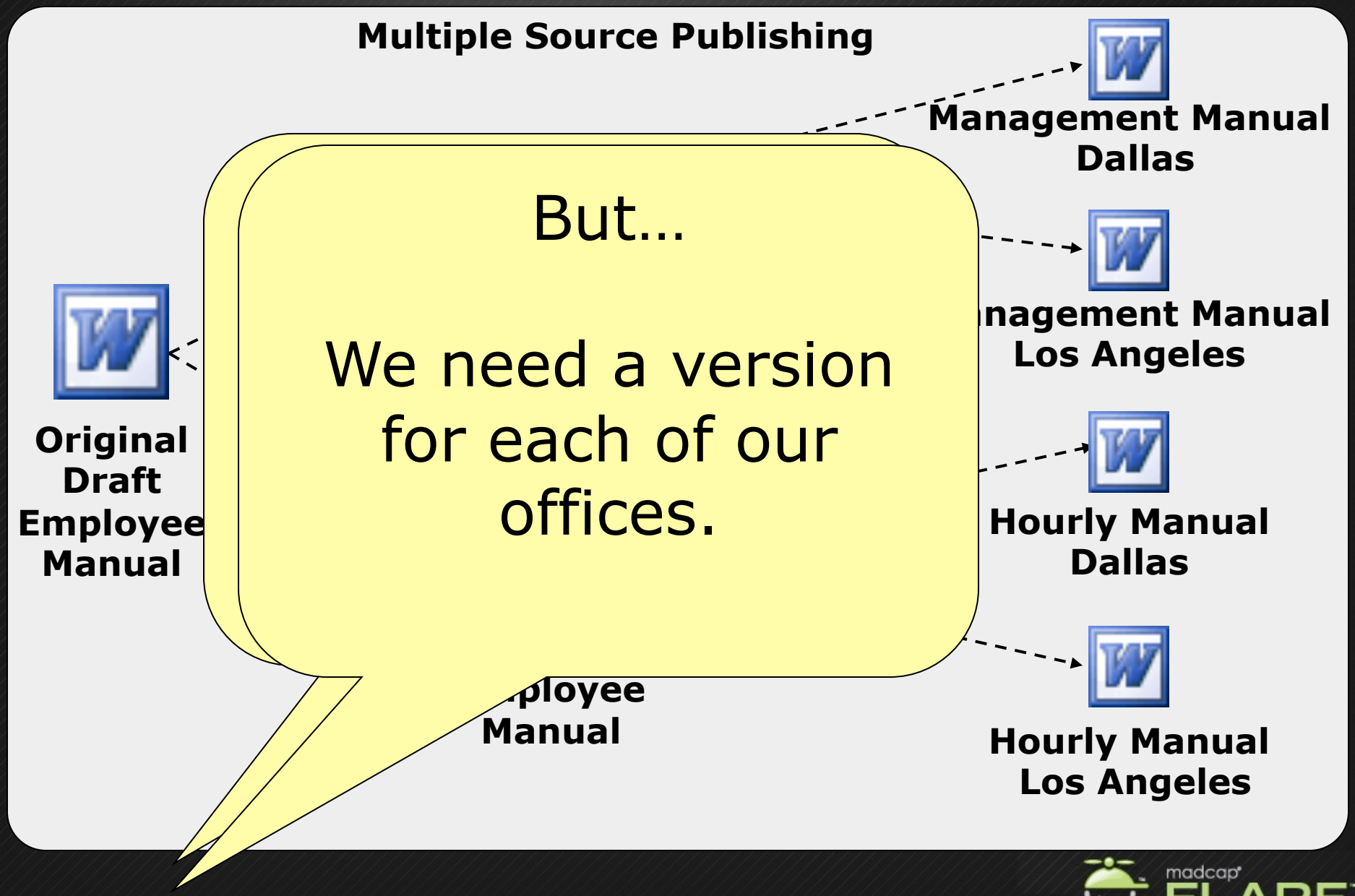
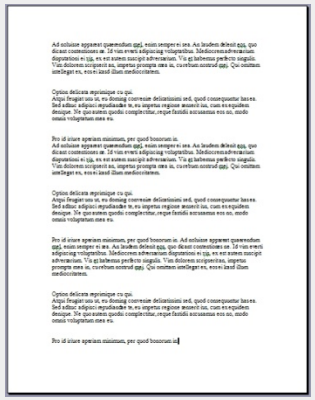
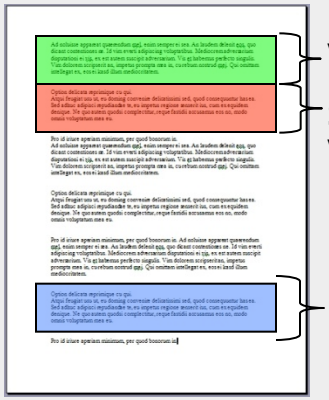
The Old Way


Multiple Source Publishing
Management Manual
Dallas
nagement Manual
Los Angeles
Original
Draft
Employee
Manual
But…
We need a version for each of our offices.
Hourly Manual
Dallas
Hourly Manual
Los Angeles

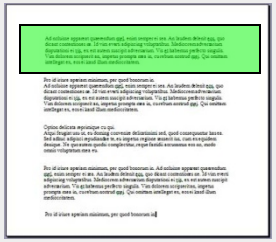
The Process

Create Master Source Files → Add Conditional Tags/Variables → Define Publishing Targets → Generate Output

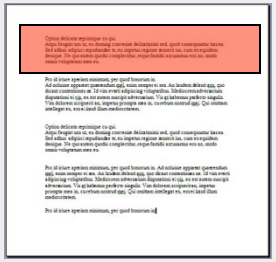




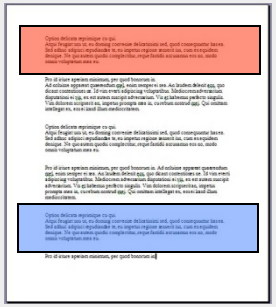
Target – Enterprise Help
- Include Enterprise info
- Exclude Standard info
- Exclude Print Info
- Define other specific attributes



Target – Standard Help
- Include Standard info
- Exclude Enterprise info
- Exclude Print Info
- Define other specific attributes



Target – Standard Print
- Include Standard info
- Include Print info
- Exclude Enterprise info
- Define other specific attributes



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Multi-channel publishing

From Mike Hamilton, V.P. Product Management, MadCap Software

Multi-channel publishing is to delivery formats as Single-sourcing is to content. Where Single-source publishing is flexibility in the re-use of content, Multi-channel publishing is flexibility in the publishing and distribution of that content to various modalities or media types, such as print (paper), print (electronic), web, computer desktop, or other.

XML

From Wikipedia, the free encyclopedia

The **Extensible Markup Language** (**XML**) is a general-purpose markup language. Its primary purpose is to facilitate the sharing of structured data across different information systems.

It started as a simplified subset of the Standard Generalized Markup Language (SGML), and is designed to be relatively human-legible. By adding semantic constraints, application languages can be implemented in XML. These include XHTML and thousands of others.

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XML

From Mike Hamilton, V.P. Product Management, MadCap Software

A proper XML work flow that works with well-formed and valid files has three requirements:

1. The content files (the actual XML files)
2. The rules (Schema files)
3. The publishing conversions (transforms)

Project

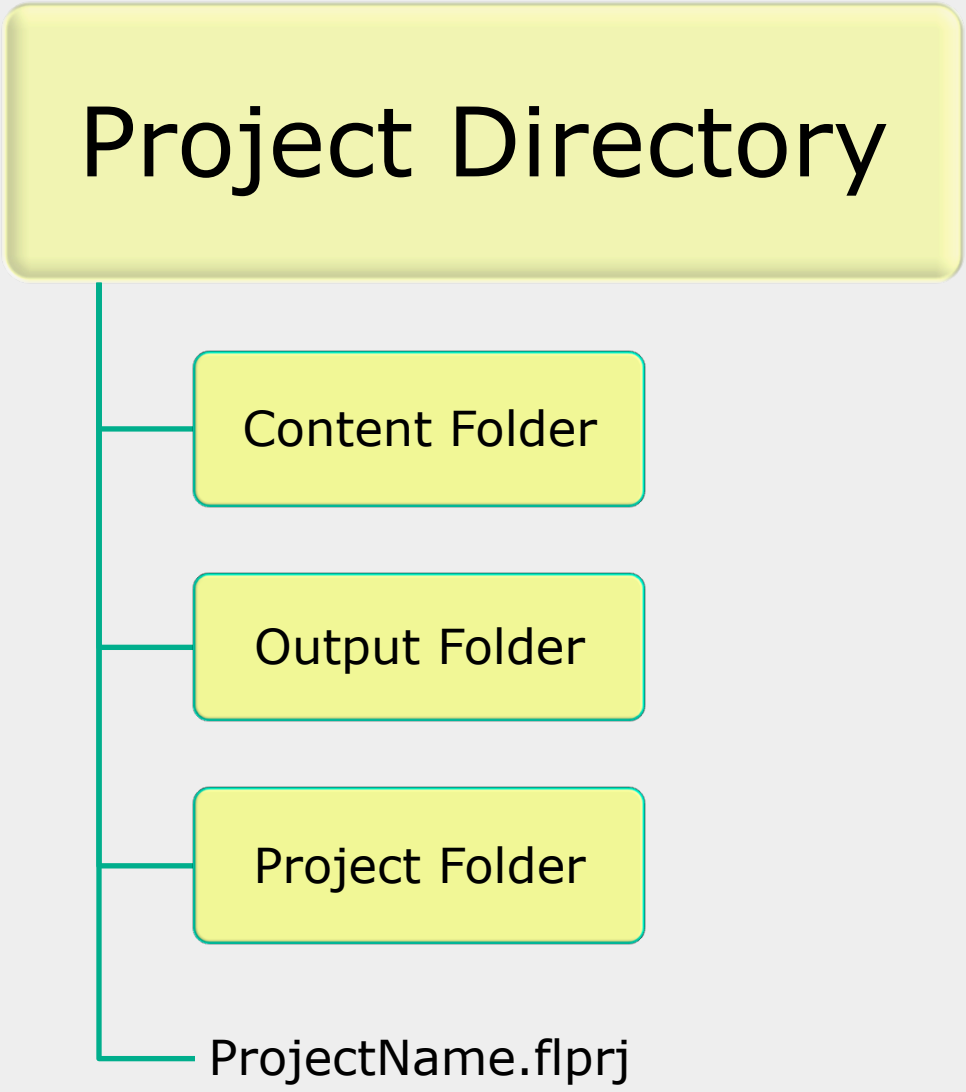
A Flare project is a collection of all of the files needed for the authoring and publishing process. These include the content files (topics), images, Cascading Style Sheet (CSS) files, templates, and more.

Not every file in a Flare project is necessarily used in generating the deliverables that you create. Collectively these files become your “palette” of available options for creating very specific documents for specific publishing needs.

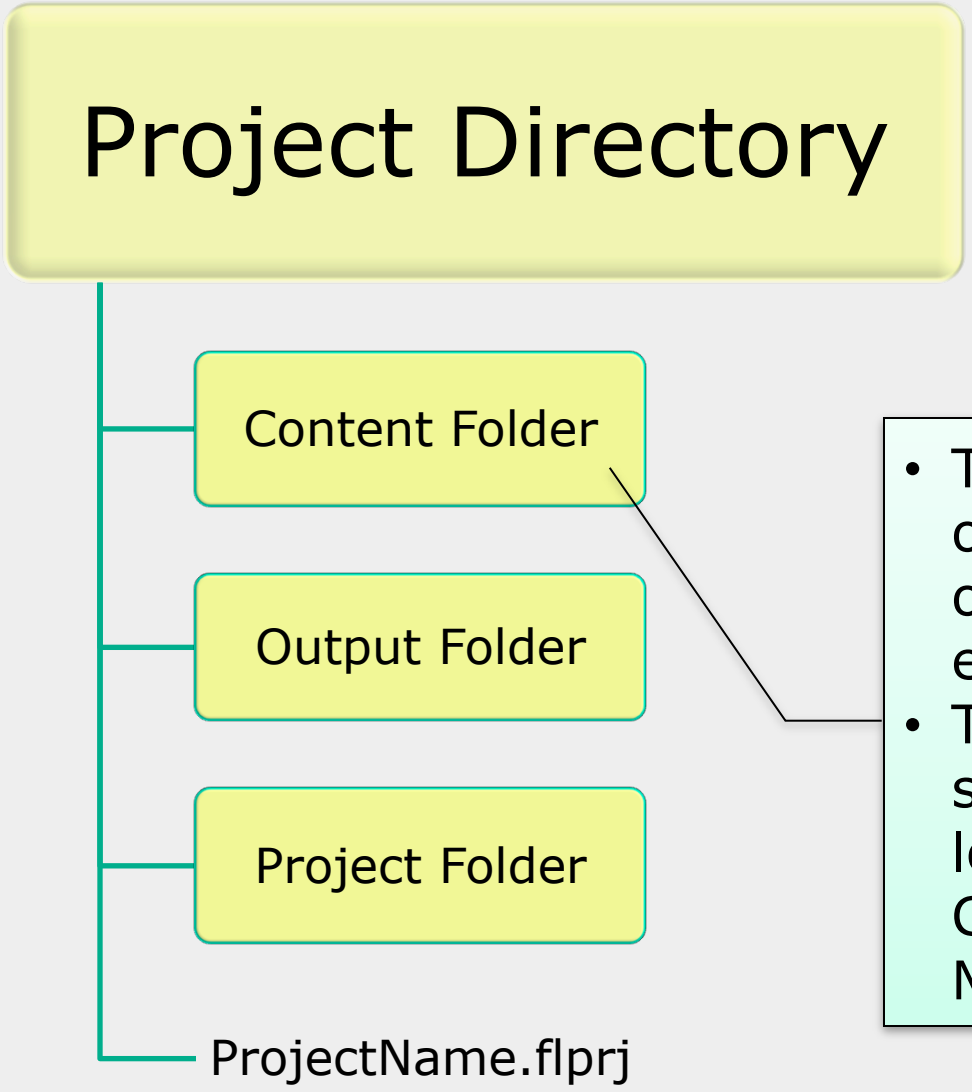
Flare Overview:

Architecture and differences from other tools

Flare Project Architecture



Flare Project Architecture



- The Content Folder stores all of the information you import or create. Topic files, images, etc.
- The Content Folder also stores files which control the look of the content. Cascading Style Sheets, Master Pages, etc.

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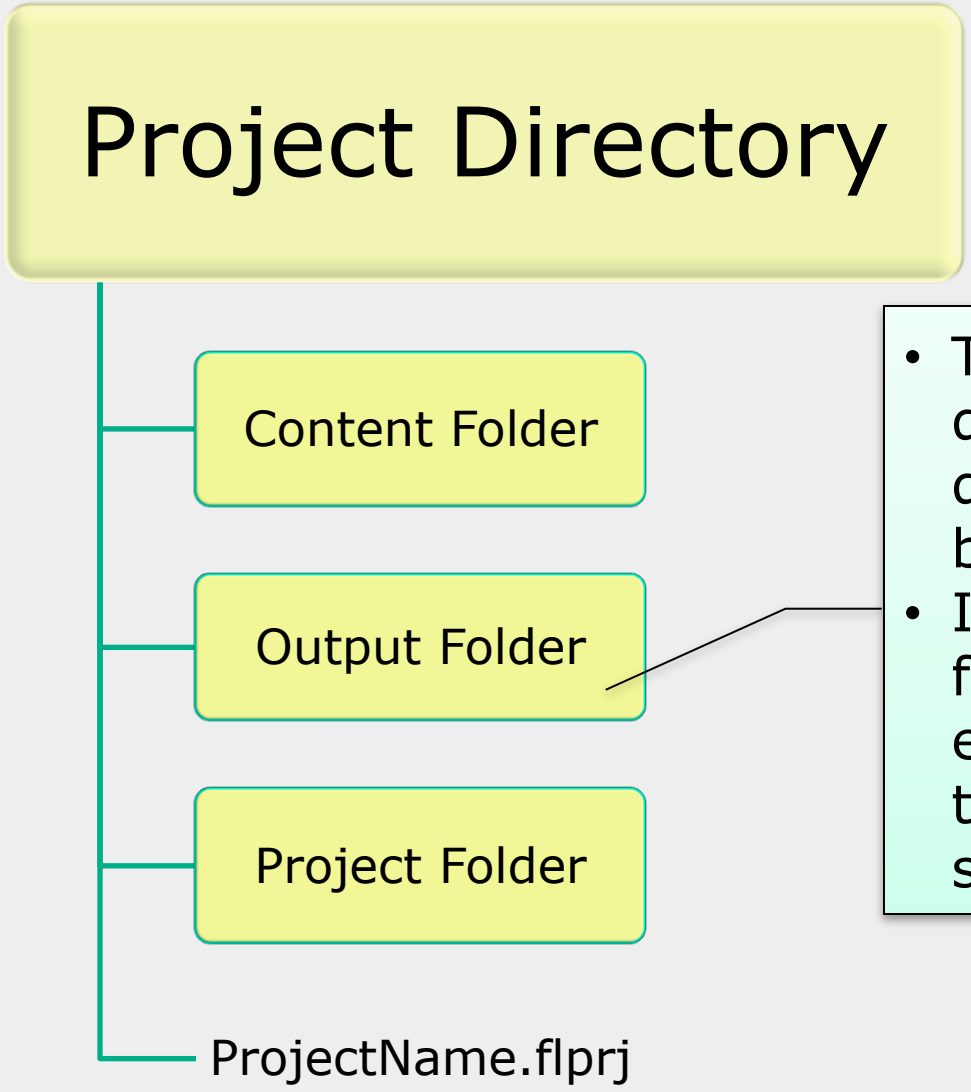
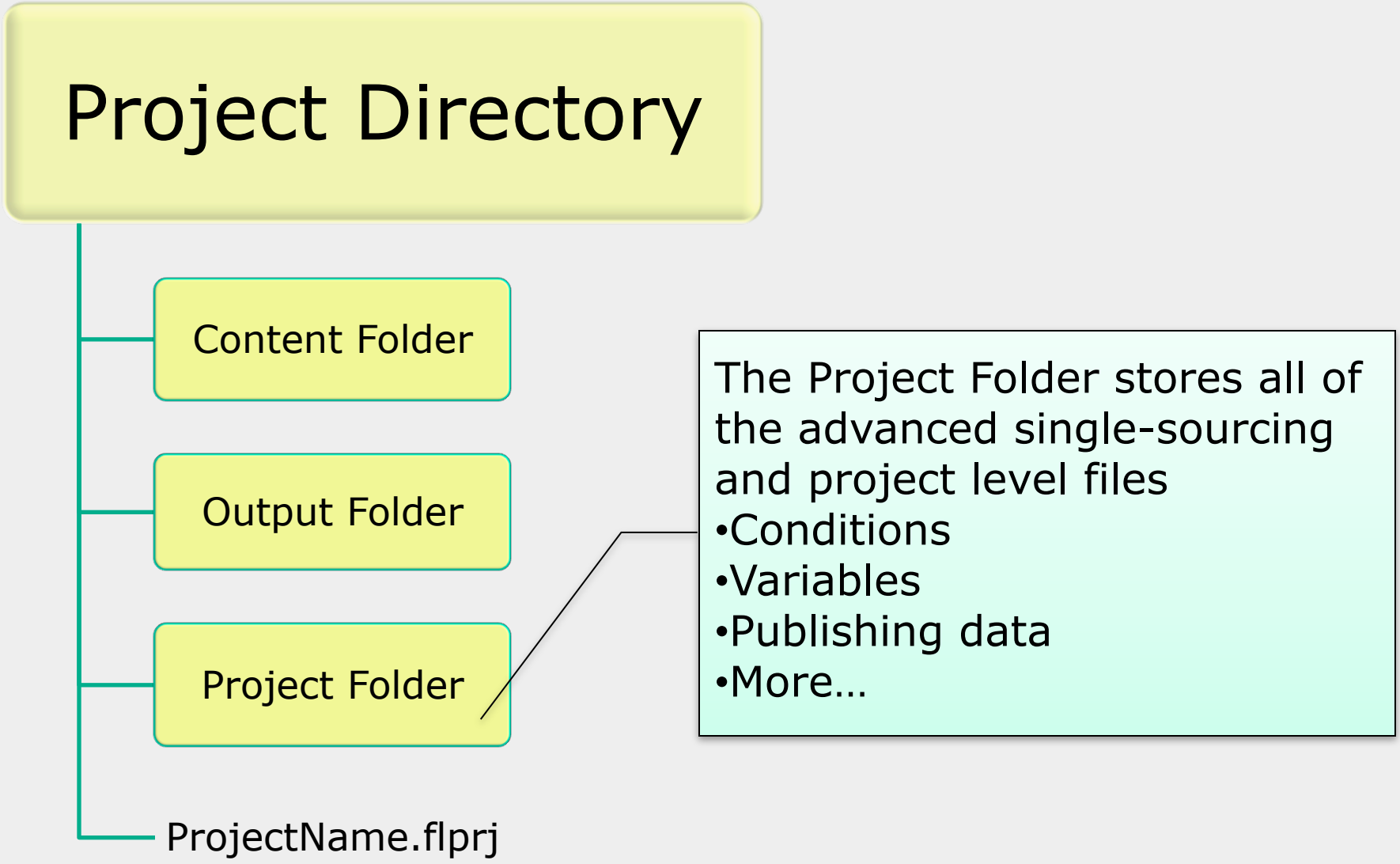
Flare Project Architecture

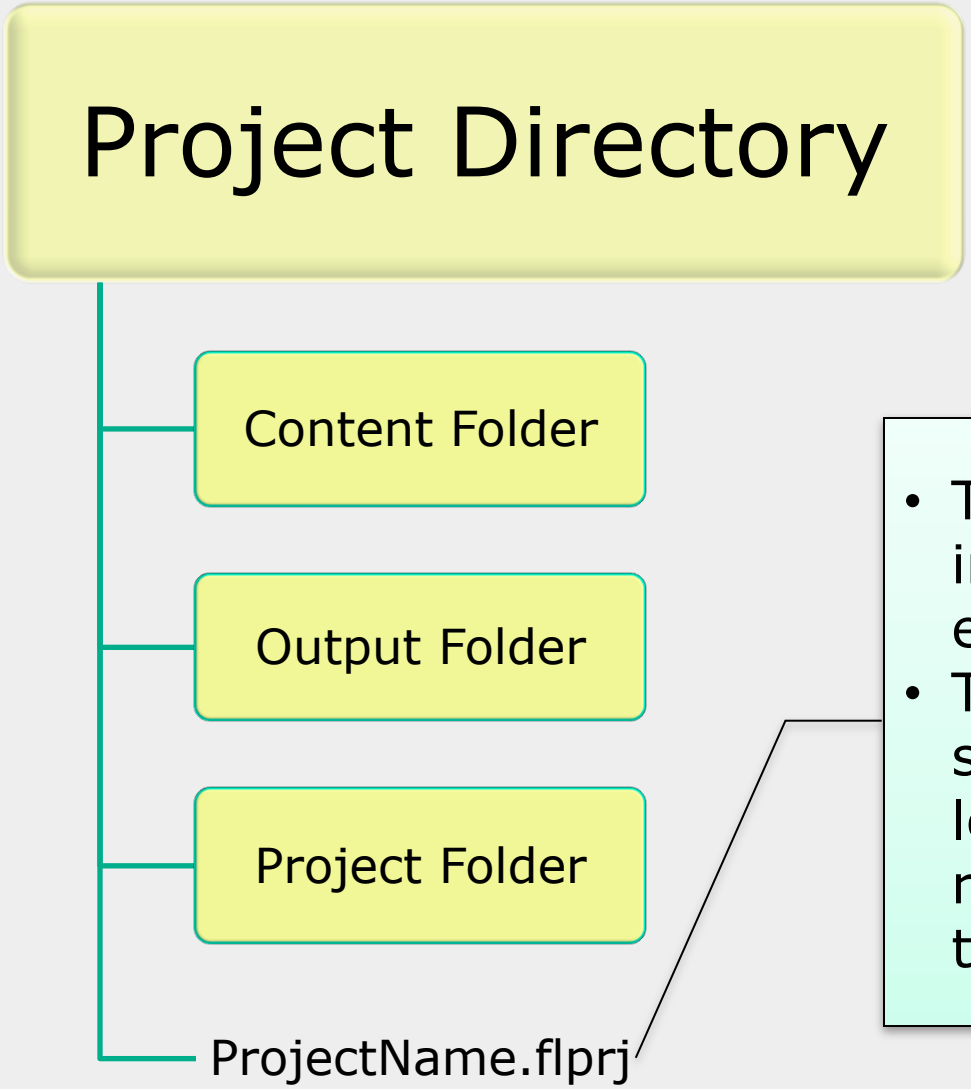


- The Output Folder is the default location where documents you publish will be stored.
- If you publish, or generate, four different “outputs” then each of these will be found in this folder, each in their own subfolder.

Flare Project Architecture



Flare Project Architecture



- The main project file is also in this directory with a .flprj extension.
- The main project file is simply an XML file with high level project information recorded to coordinate all of the other project files.

Flare Architecture Key Points

Attribute	Benefit
A Flat File structure – There is no hidden database	Flare projects can be stored locally on your PC or they can be stored on a network drive without fear of database corruption that plagues tools with older architectures.
XML files exclusively	All Flare files, not just content but also project files, are standard XML files. There are no hidden, proprietary, or binary files. This allows complete project transparency and access to all content and data, even from external tools.
Unicode support	The Flare editor and architecture are compatible with industry standards making it much easier to localize content if or when necessary.

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Forget what you know from previous tools!

OK, perhaps that is a little harsh, but Flare has been built from the ground up to support single-sourcing so many of its capabilities are more granular and flexible than items presented in Wizards in other tools.

Many problems new users have are from trying to do things in Flare “the old way” that they did them in previous tools.

Example – RoboHelp Word Import

- A wizard driven, one step process
- Must be repeated every time a document is imported

Flare Word Import

- A **TWO** step process
- First define the import rules and save them as a reusable file
- Then import the actual Word document(s) using the import rules file

Example – WWP and Framemaker

- Uses a single template to control all conversion and publishing
- Can use this template to go straight from Framemaker directly to published output

Flare and Framemaker

- Can also go straight from Frame to published output BUT what is a single template in WWP is two files in Flare
  - The import rules
  - The publishing rules

Flare Interface Tour

(Live Demo)

New Project Guidelines

Project Planning

- Plan before you begin!
- Who is the target audience?
- What are their needs?
- What is the scope of the project? How many deliverables?

- Once these questions are answered, get buy in from all stakeholders

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Project Planning

- Once the high level questions are addressed, where do you begin?
- More planning! What specific content needs to be written?

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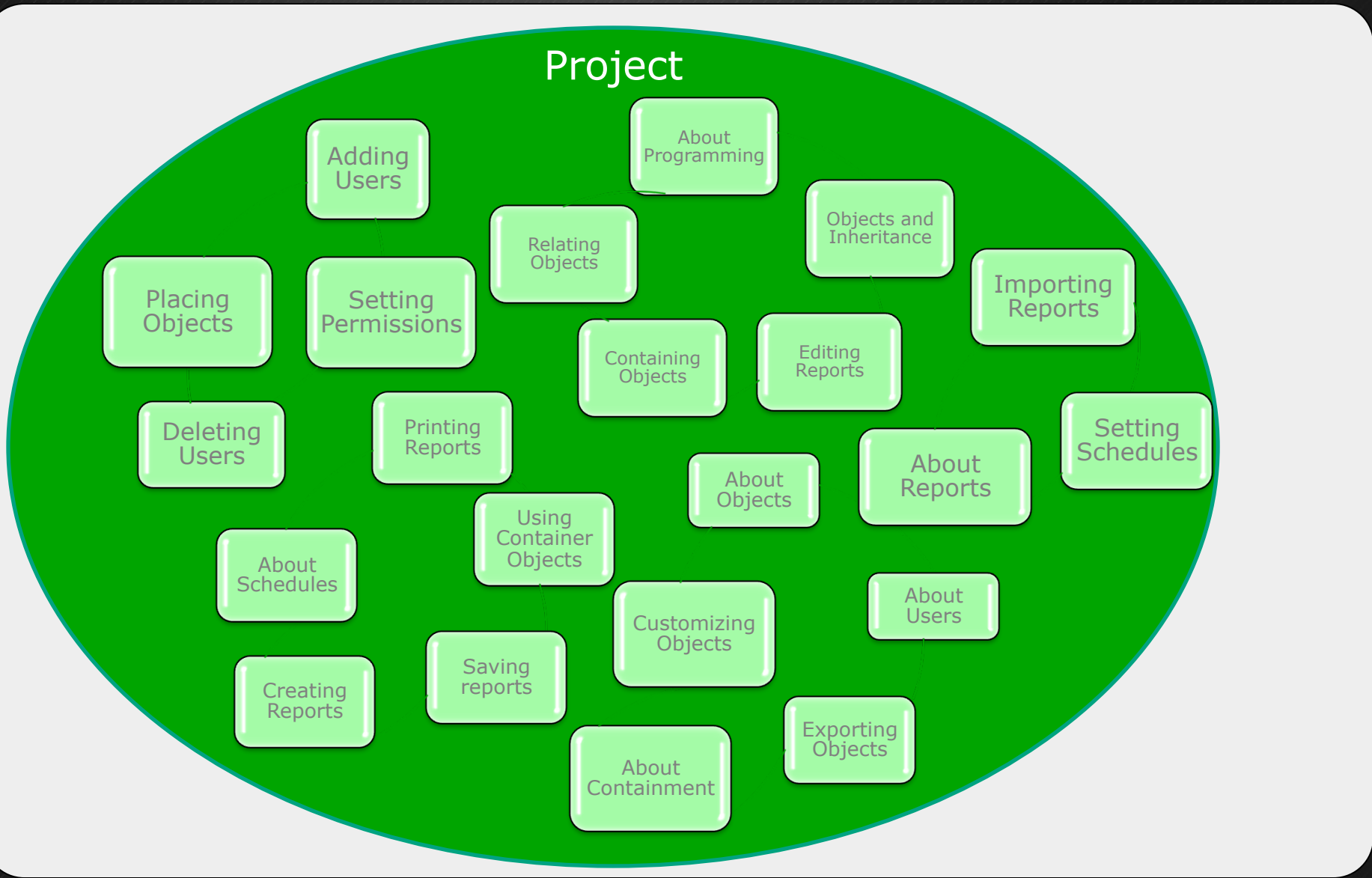
Remember – Think Topics



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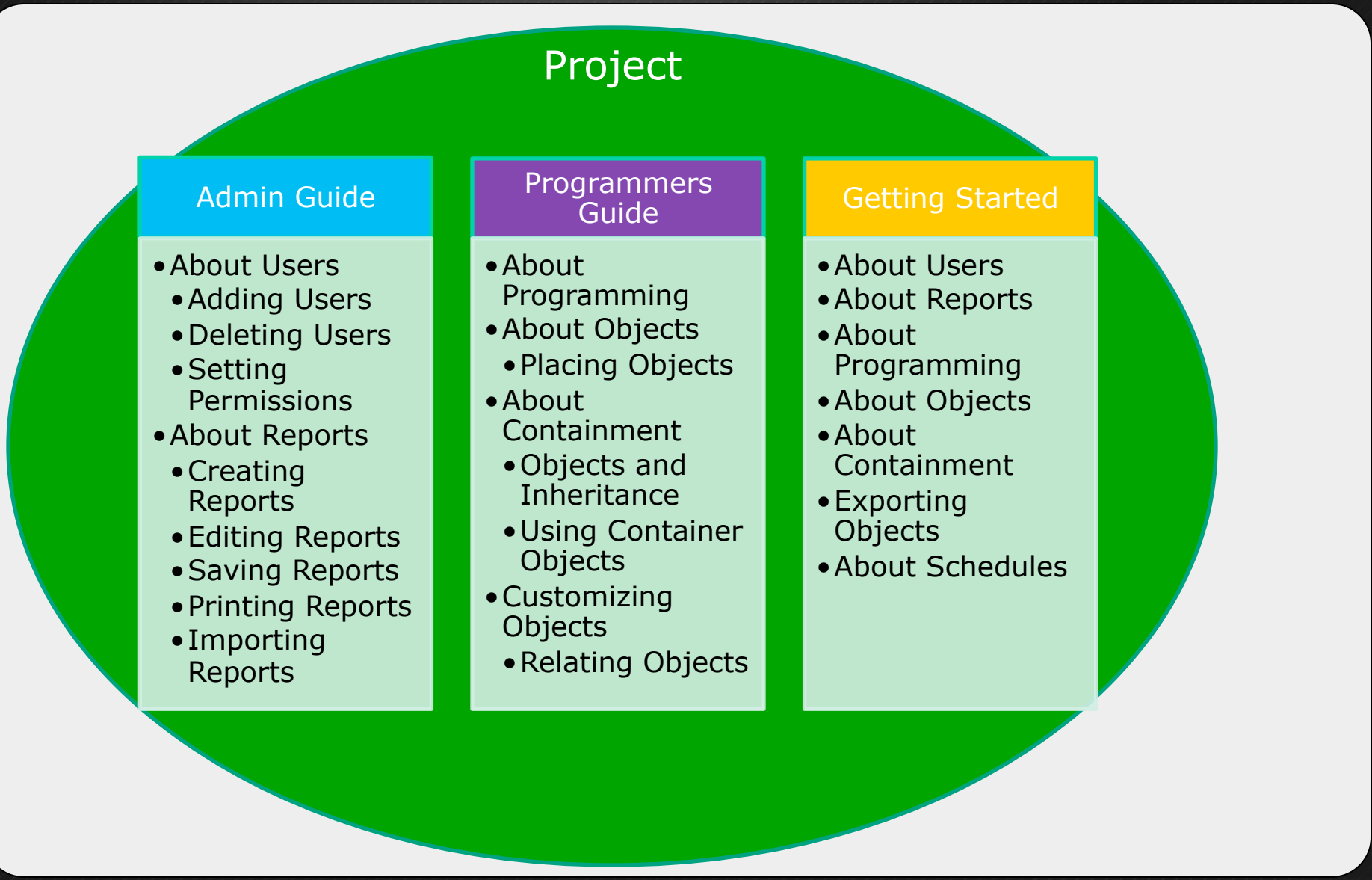
Remember – Think Topics



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How do I know what topics I need?

- Identify all the
  - tasks the user needs to accomplish
    - What do they need to do?
  - concept info they need for each task
    - What do they need to understand to do it?
  - reference info they need for each task
    - What do they need to know while they do it?

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Flare Power Tip!

- At the beginning of a project bring key staff together for brainstorming
- Brainstorm the various tasks customers will need to accomplish
- Open Flare and create a new Table of Contents
- As tasks are identified capture them by adding a new TOC page in Flare
- No need to manually transcribe later!

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Creating Projects

Creating a Flare Project

Flare projects can be created from:

- Flare templates
- Your custom templates
- Microsoft Word or Framemaker documents
- RoboHelp HTML projects
- DITA content (announced today!)

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Show Various Project Creation Methods

(Live Demo)

Adding Content to Projects

Creating a New Topic

To create a topic:

1 Select a folder in the Content Explorer.

2 Click **in the Content Explorer toolbar.**

—OR—

Select **Project > Add Topic.**

—OR—

Right-click the **Content folder and select Add Topic.**

The Add New Topic dialog appears.

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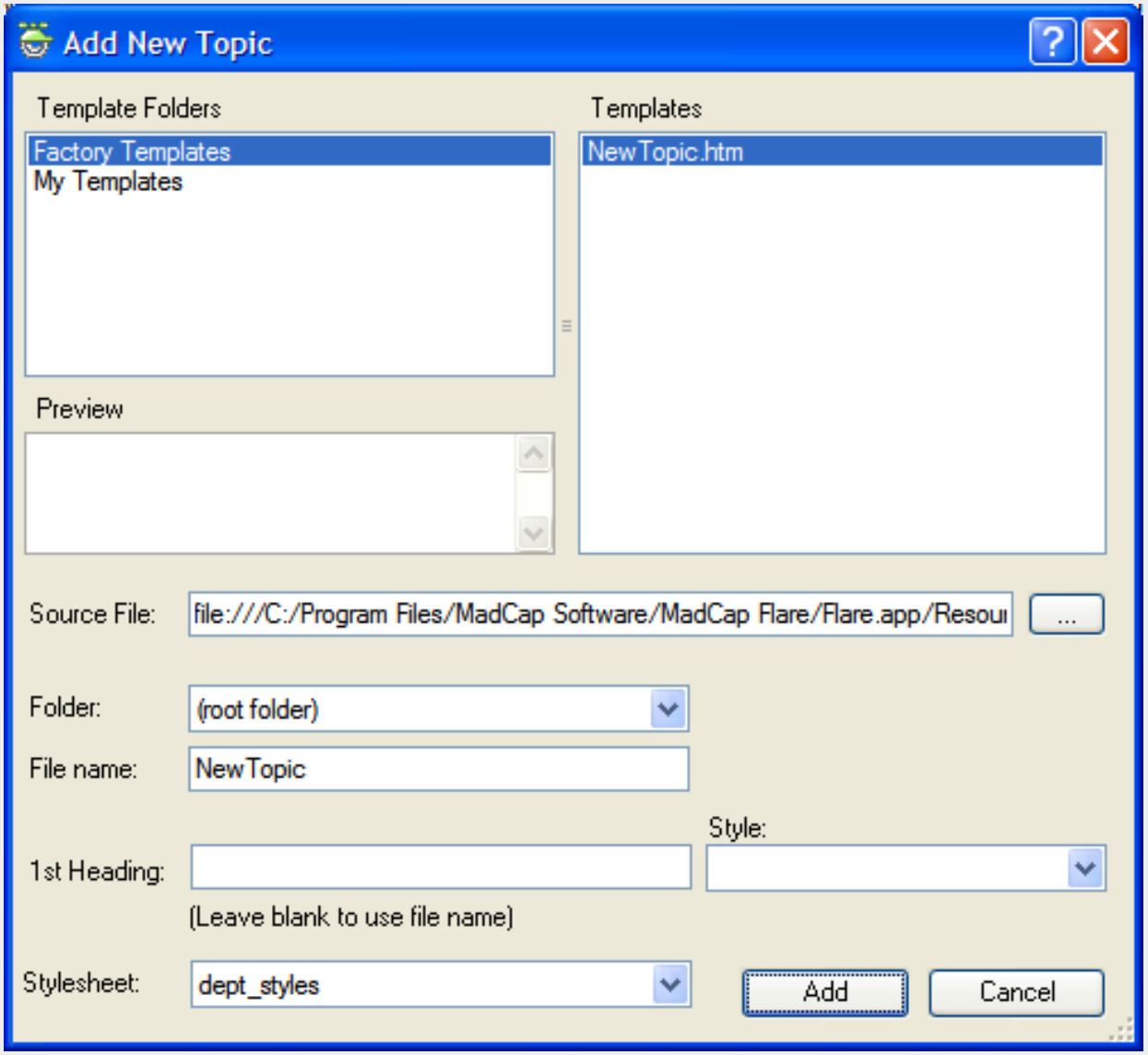
Creating a New Topic



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Leveraging Word and FrameMaker Content

Process

- Select documents to import
- Determine topic break points
- Choose import options
- Style sheet import/creation
- Style mapping

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Leveraging Word and FrameMaker Content

Two key items

- Style handling during import
- Which workflow to choose
  - “EasySync”
  - Single Import

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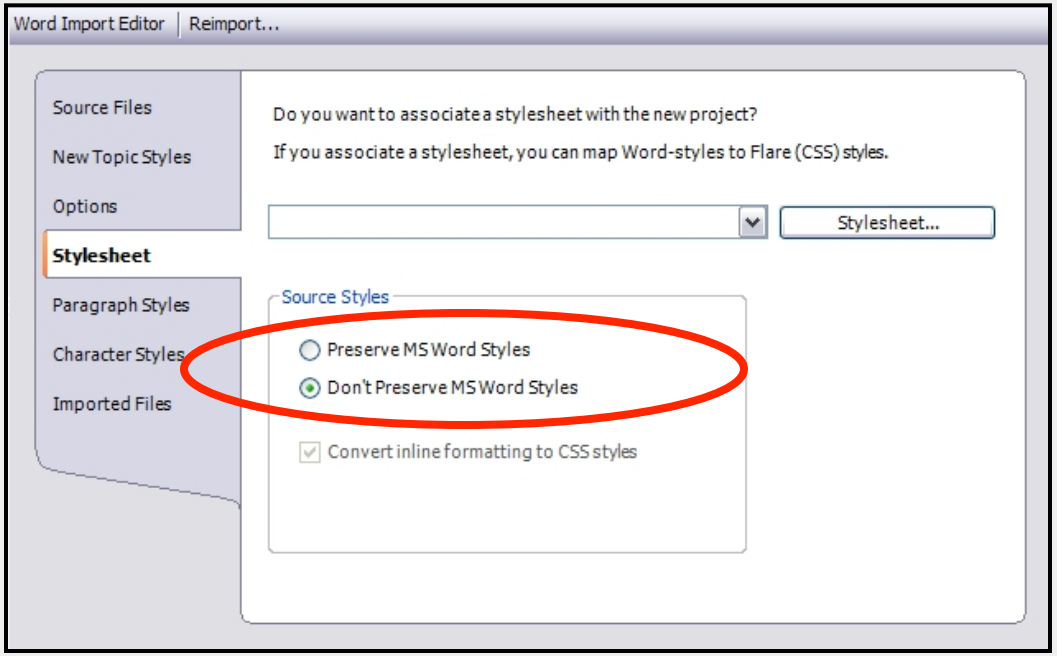
Leveraging Word and FrameMaker Content

Style handling during import

- The key decision – to Preserve Styles or not



- This will impact how styles will be named in the Flare project

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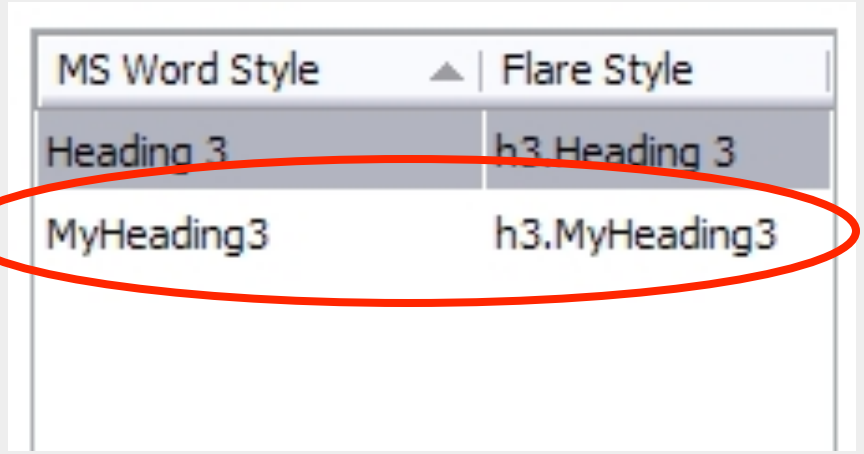
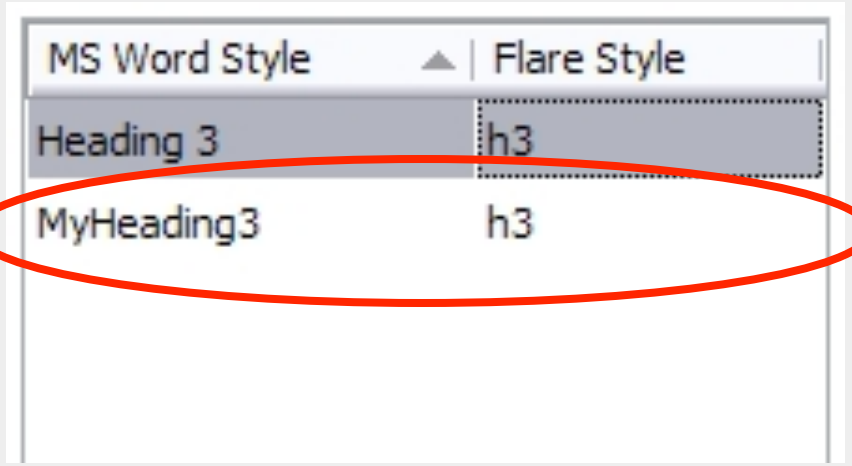
Style handling during import

Preserve Styles During Import



Do Not Preserve Styles During Import



Leveraging Word and FrameMaker Content

Which workflow to choose

- Single Import
  - Leverage completed documents
  - Imported content can be edited freely within the Flare editor
- "EasySync"
  - Leverage "live" documents
  - The source editor (Word or FrameMaker) should be used for all content edits

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Adding Graphic/Media Content

To insert an image:

1 Open a topic.

2 In the XML Editor, place your insertion point cursor where you want to insert the picture.

3 Click **in the XML Editor toolbar.**

—OR—

Select **Insert > Picture.**

The Insert Picture dialog box appears.

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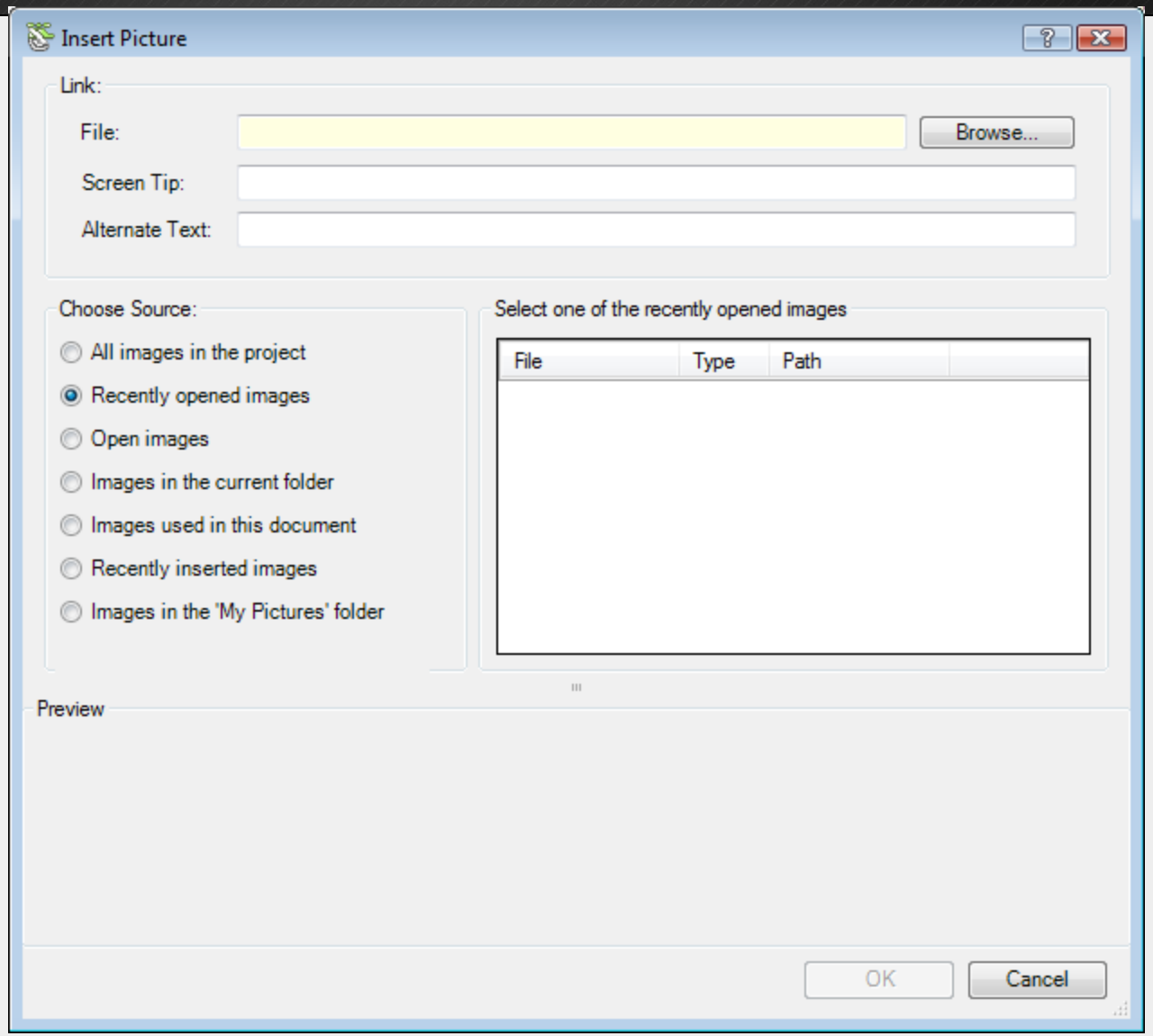
Adding Graphic/Media Content



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Live Image Editing Using MadCap Capture

(Live Demo)

Adding Navigation

Three primary navigation tools

- Table of Contents
- Index
- Search

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Creating a Table of Contents (TOC)

A TOC is constructed of two representations

- Books
  - Act as “containers” and provide navigation to large sets of information
  - May or may not also act as links to topics
- Pages
  - Provide links to your topics

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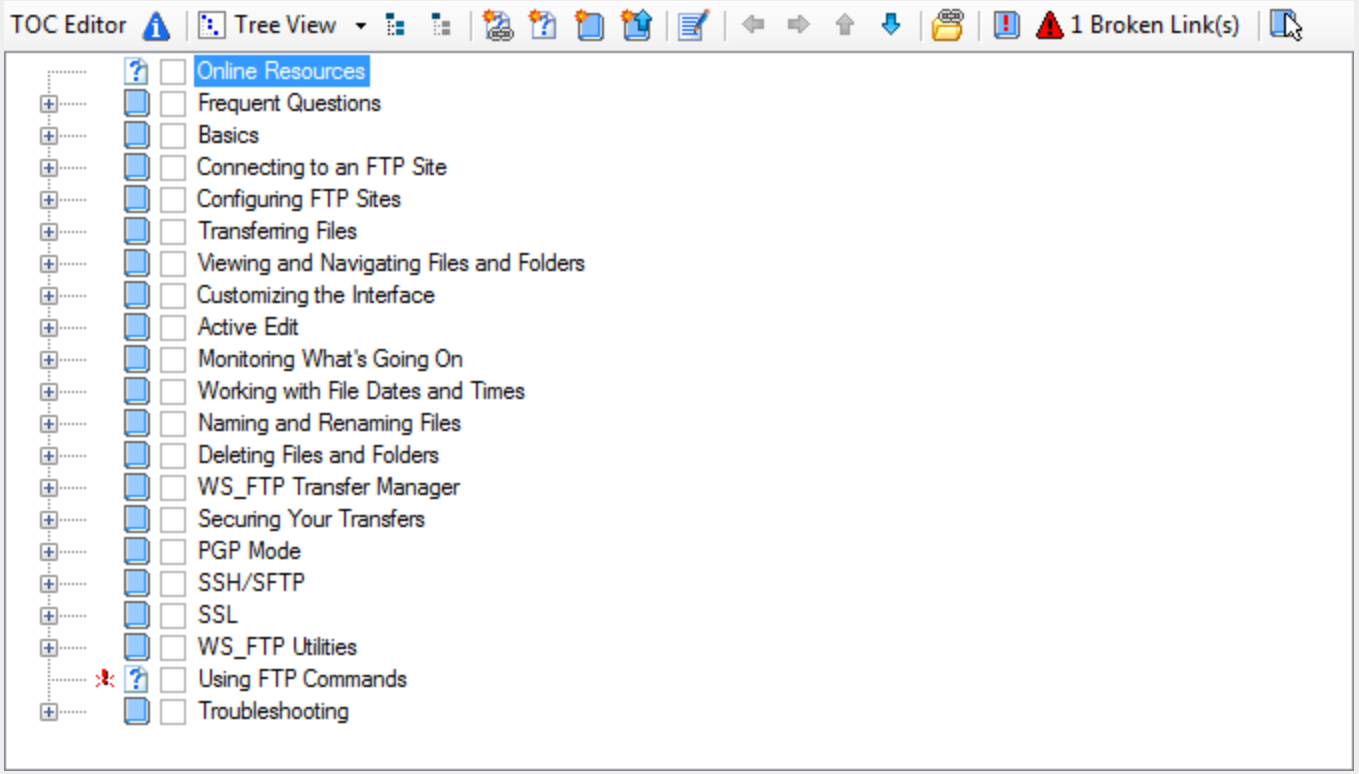
Creating a Table of Contents (TOC)



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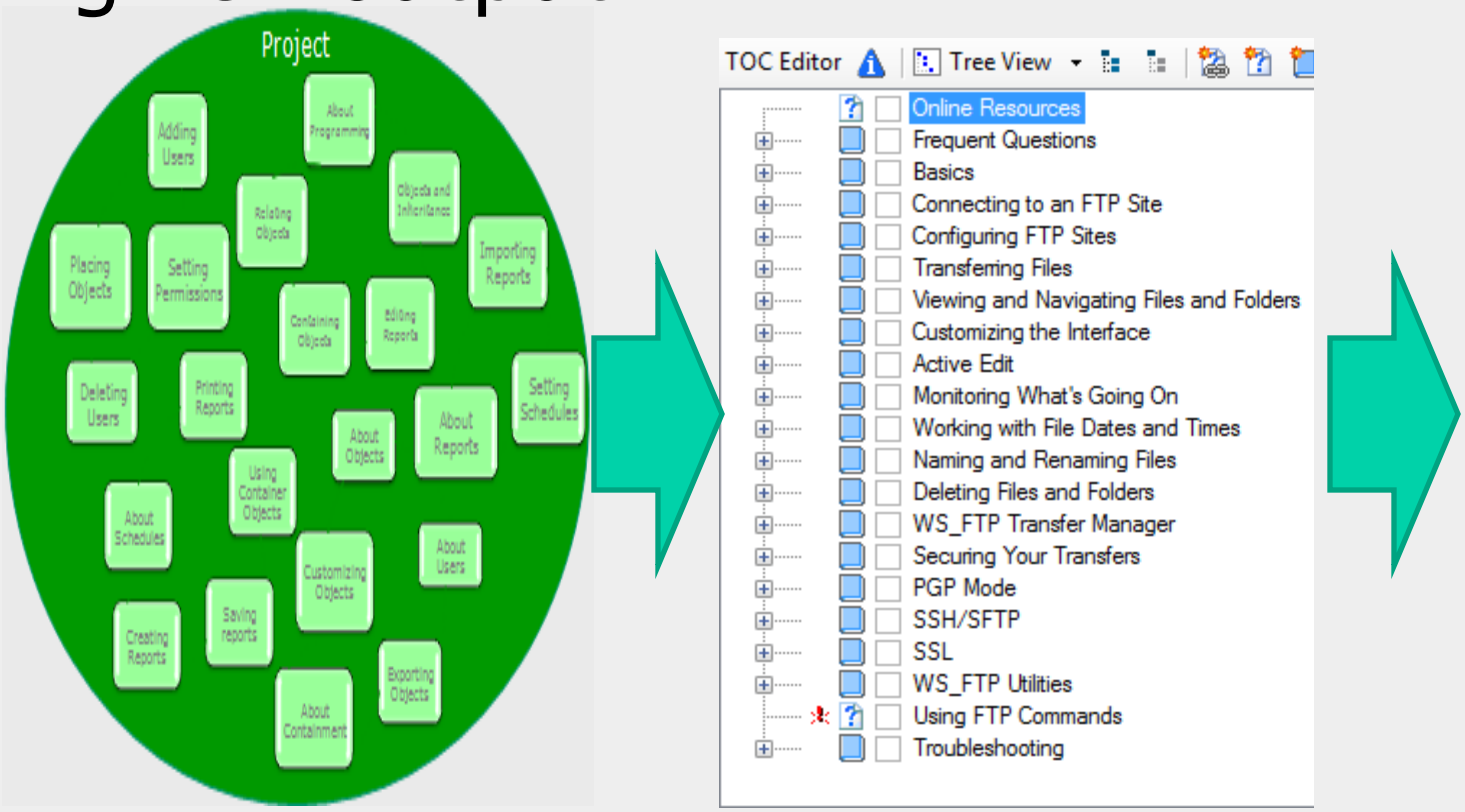
Remember – Think Topics

A TOC determines which topics are published, and in what order, for any given output.



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Indexing is the art and science of making information accessible through the use of keywords

- Each keyword provides a shorter list of more relevant topics than would be returned when searching for the same keyword in the full-text search.
- It lets users know what keywords are relevant in the product.
- It converts to an index in print documentation.
- Beginner to intermediate users with specific questions may have the best chance of finding the answer to their question quickly by starting with the index.

Indexing in Flare

- Go beyond the terms in your text
- Include synonyms or phrases your readers would likely use to look up information
- Be consistent:
  - Do you say “insert” (infinitive) or “inserting” (participle)?
  - Do you say “picture” (singular) or “pictures” (plural)?
  - Do you capitalize the terms (Inserting a picture, inserting a picture, or Inserting a Picture)?
  - Do you include phrases (inserting a picture)?
  - Do you create sub-keywords?

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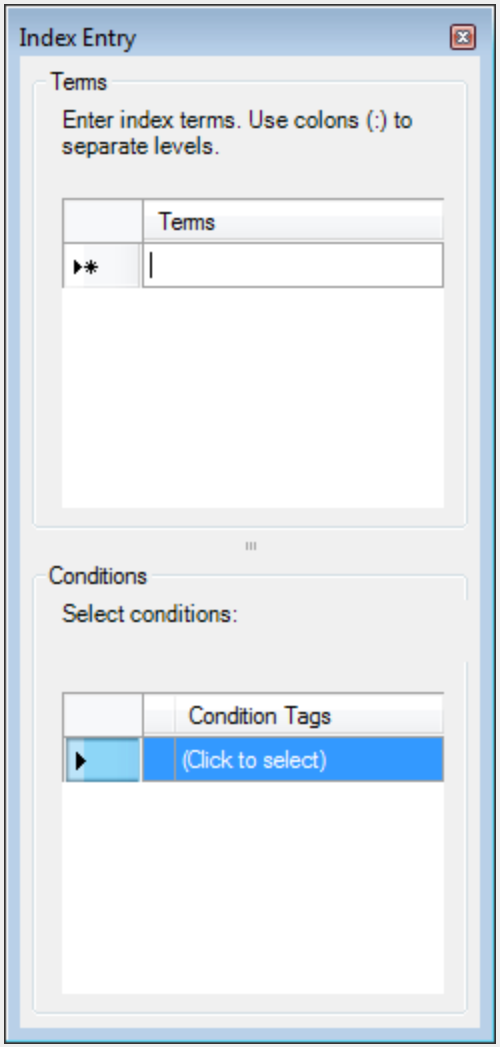
Indexing in Flare

- Place the cursor in the text you want to index
- F10 – Adds the word from your topic to your index
- F9 – Opens the Index Entry dialog and allows you to enter synonyms



Search

- Built automatically
- You can augment/improve search results by creating good index keywords
- Search result ranking based on:
  - Number of times search term appears
  - Where it appears (headings, body,…)
  - Indexing

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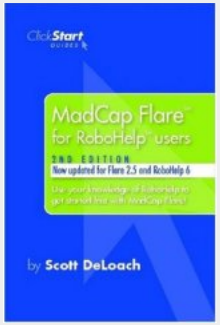
Suggested Reading List

1. Watch all of the built in Flare tutorial videos.

2. Read as much of the online help overview information as I could handle.

3. Build a couple or three test projects to get a feel for what is going on.

4. Coming from RoboHelp, get a copy of Scott's great book.



MadCap Flare for RoboHelp Users
by **Scott DeLoach**
ISBN-13: 978-0615141459

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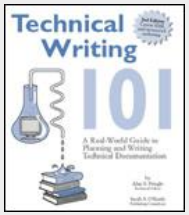
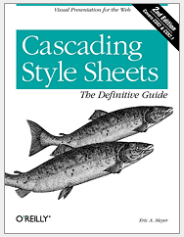
Suggested Reading List

HTML, XHTML, and CSS, Sixth Edition (Visual Quickstart Guide)
by **Elizabeth Castro**
ISBN-13: 978-0-321-43084-7



Technical Writing 101: A Real-World Guide to Planning and Writing Technical Documentation
by **Alan S. Pringle** and **Sarah O'Keefe**
ISBN-13: 978-0970473325



CSS: The Definitive Guide, Second Edition
by **Eric Meyer**
ISBN-13: 978-0596527334

DHTML and CSS for the World Wide Web, Third Edition (Visual Quickstart Guide)
by **Jason Teague**
ISBN-13: 978-0-201-73084-5

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Questions?

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Thank You!

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