

Policies and Procedures Template



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Introduction

Welcome to the *Policies and Procedures Template Reference Guide*. This guide outlines quick custom changes that can be made to the template to fit your brand. For more details about Flare and implementing features into your project, please refer to the online Help at <https://help.madcapsoftware.com>.

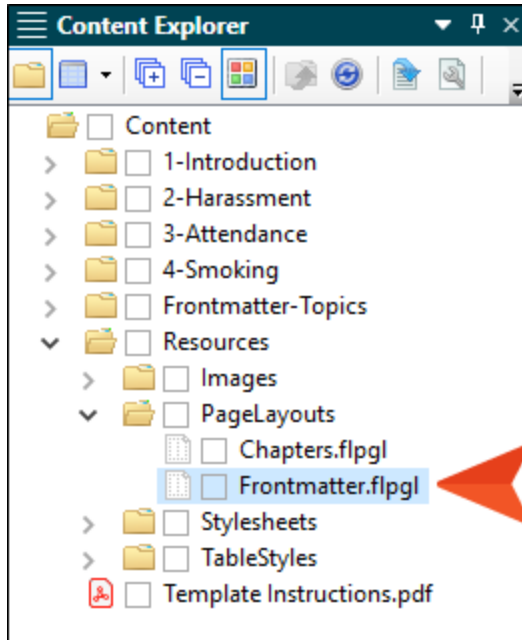
Changing Images

The logo and other images can be changed in this project.

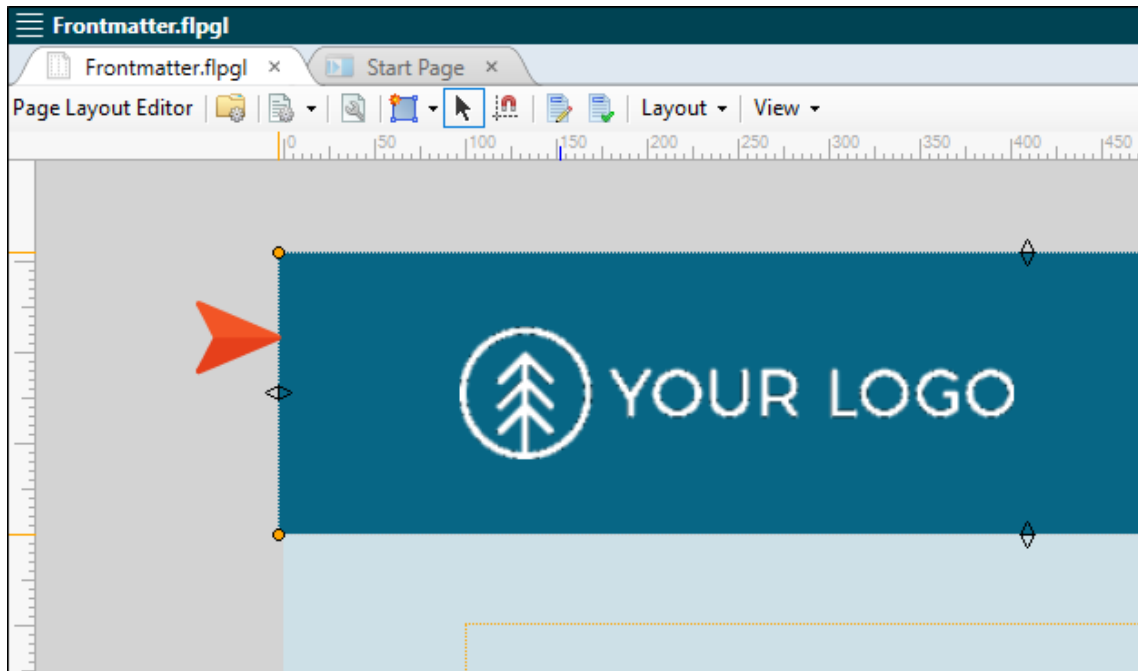
✓ **Tip:** Before selecting a new logo in the topic, you should save your image at the desired size. The dimensions of the main placeholder logo are **244 x 58 pixels**. Your image does not need to be this exact size, but it should be sized so that it looks good in the panel where it is inserted. Also, keep in mind that the placeholder logo is a vector file (in this case, an .eps file), which works well in print-based output for images such as logos, because it does not lose clarity when it is resized. You can use a raster format (e.g., .png, .tif, .gif), but these typically lose some clarity when resized.

How to Change the Logo

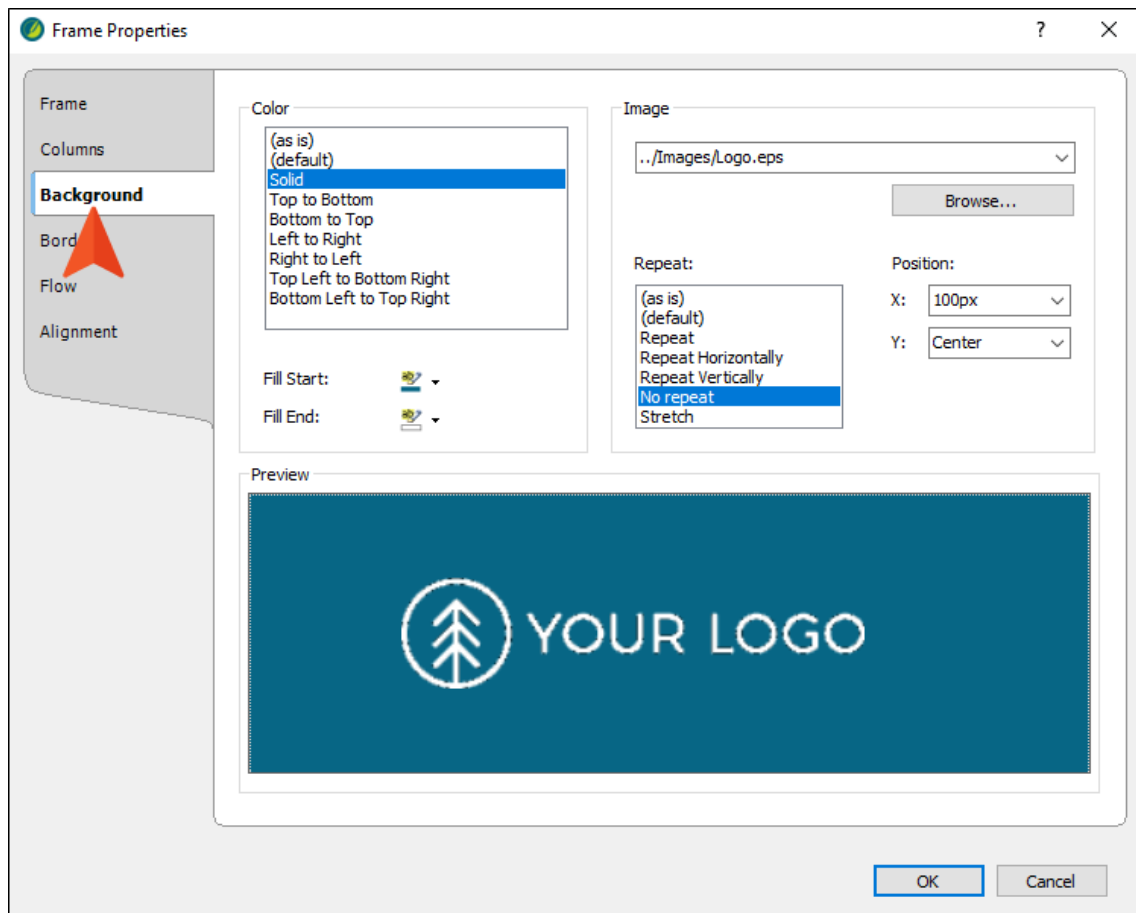
1. Open the Content Explorer, expand **Resources > PageLayouts**, and double-click **Frontmatter.flpgl**.



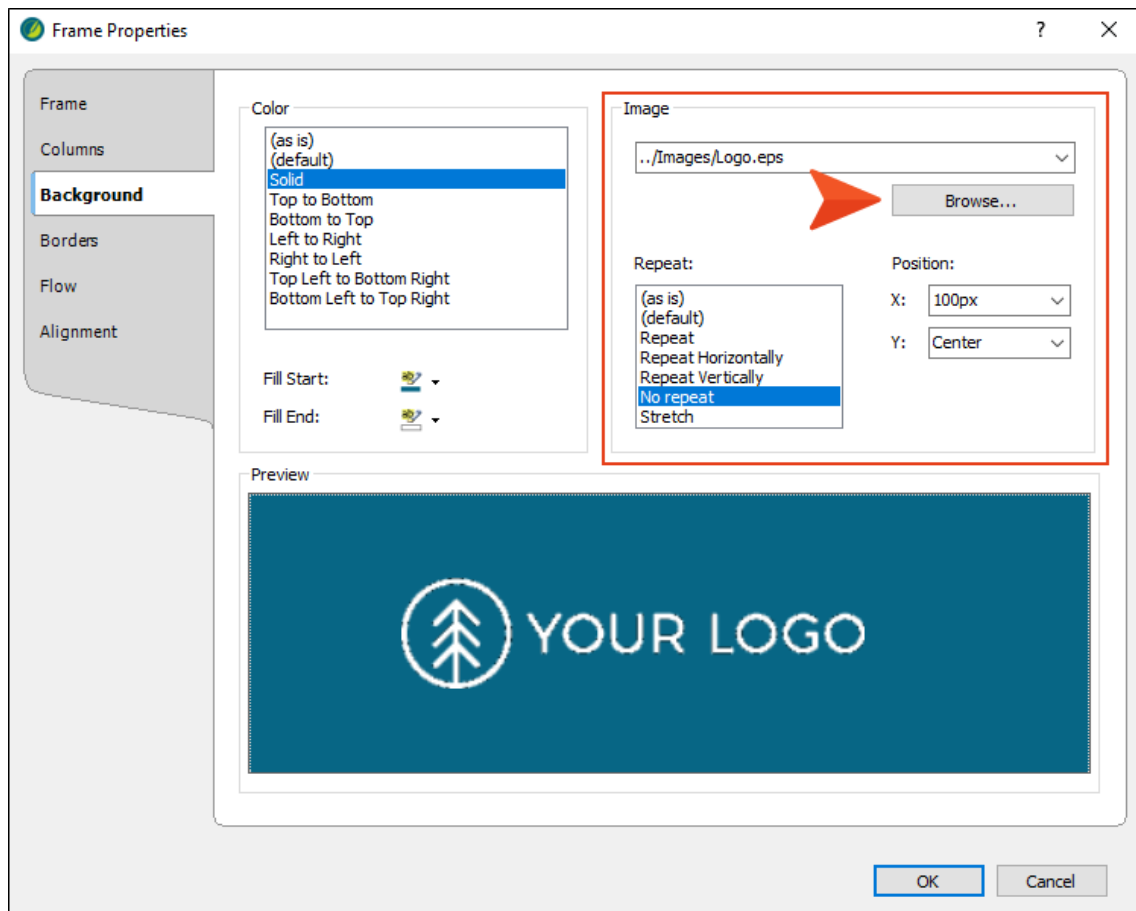
2. Double-click the decoration frame with the dark background that is displaying the image.




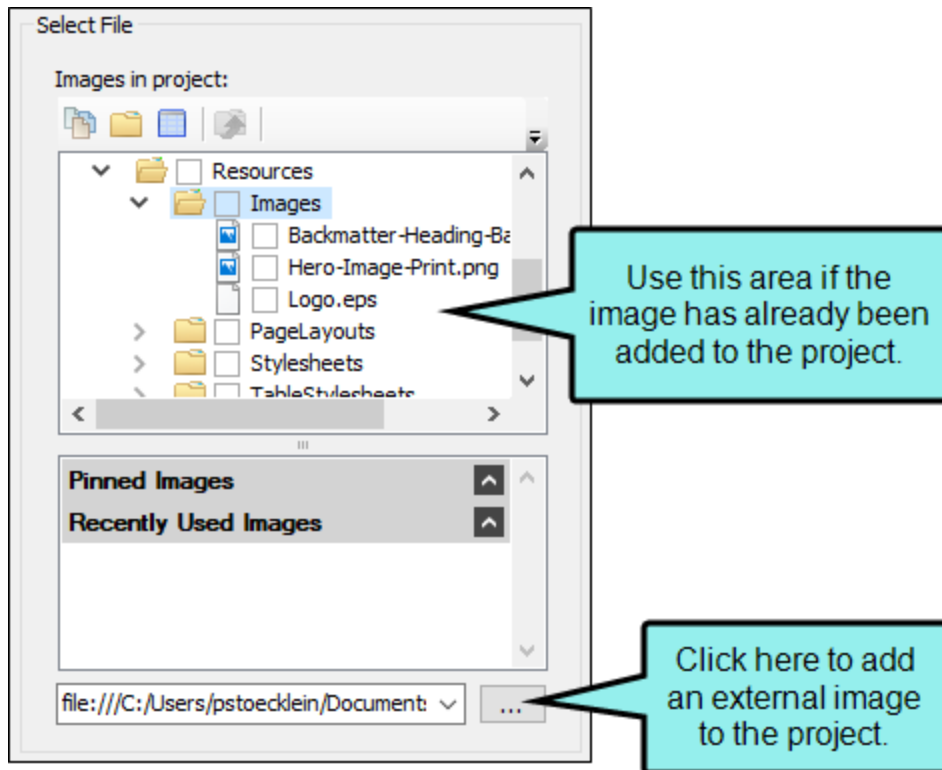
3. In the Frame Properties dialog, select the **Background** tab.



4. In the **Image** section, click **Browse** to choose a new image. You can also use the other fields in this section to change the repeat and position properties.



5. In the **Select File** section, locate and choose your image. If you have already added your image to the project, you can select it from the top area. If you have not yet added it to the project, click  and select it (the image will then be added to the project).

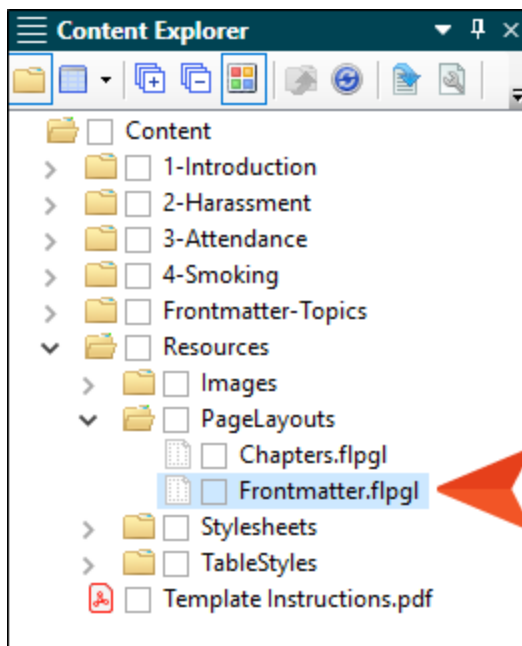


6. In the Insert Image dialog, click **OK**.
7. In the Frame Properties dialog, click **OK**.
8. Save the file.

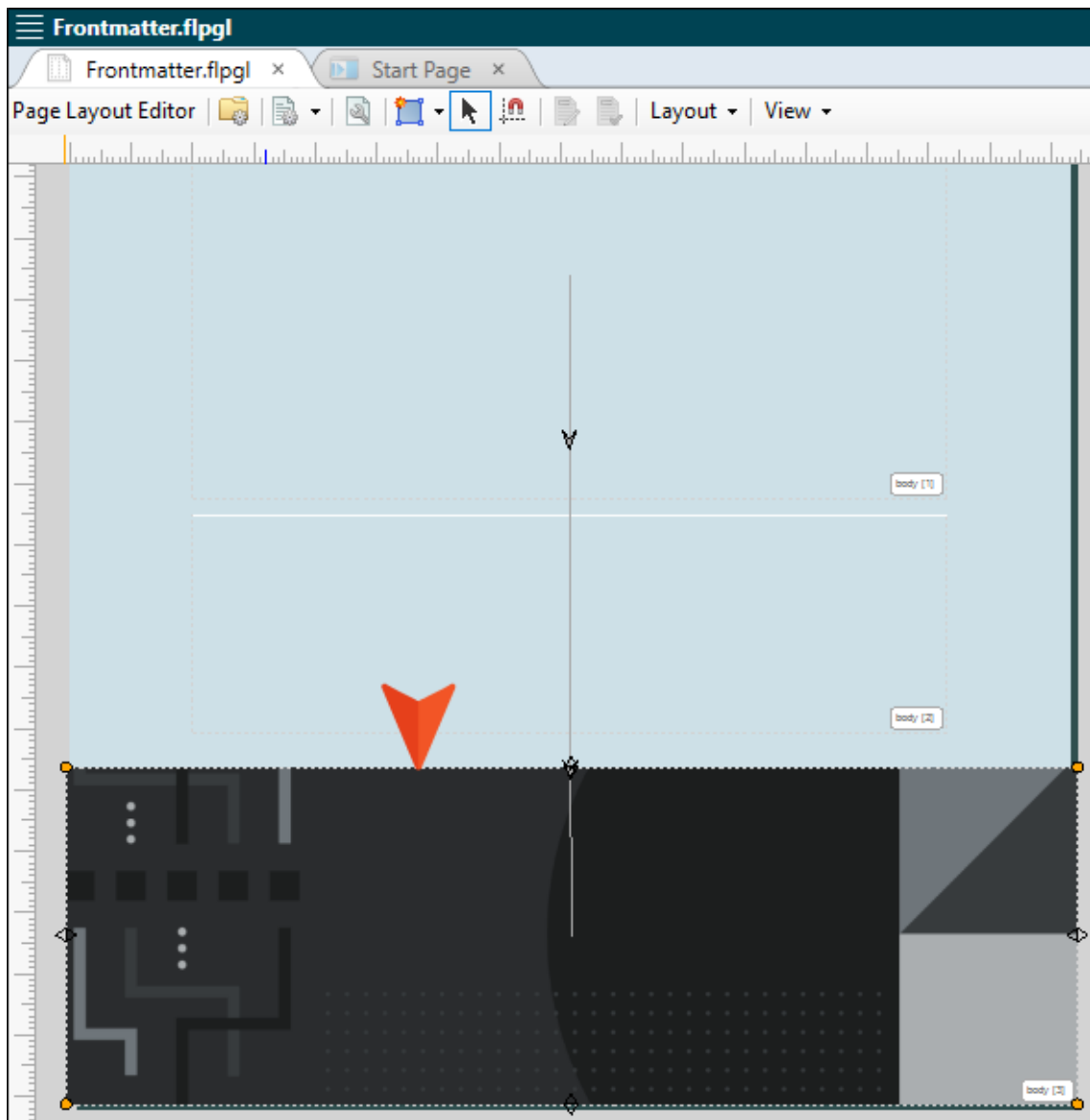
How to Change the Title Page Decoration Image

In addition to the logo, there is another image that is displayed at the bottom of the title page for PDF output. Like the logo, this image was inserted into the **Frontmatter.flpgl** page layout, which controls the structural format of the title page.

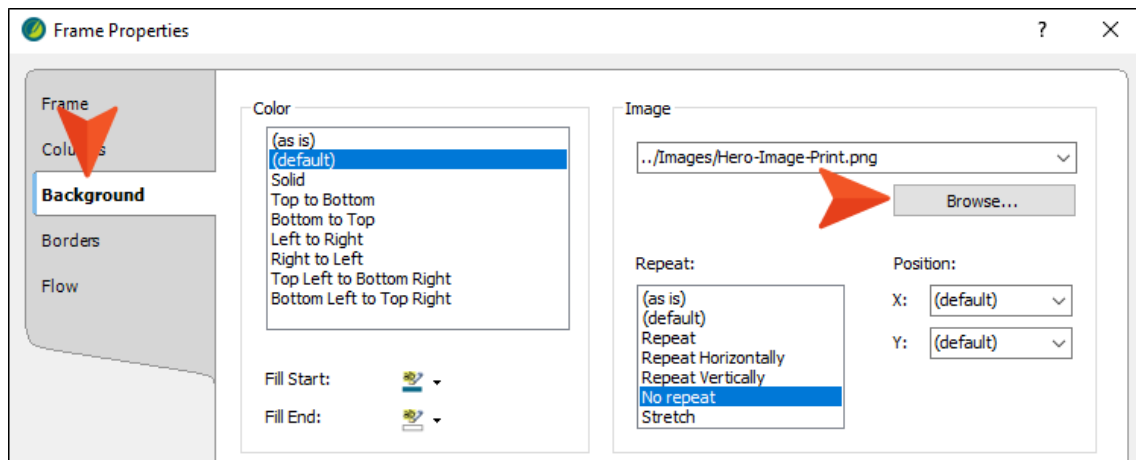
1. Open the Content Explorer, expand **Resources > PageLayouts**, and double-click **Frontmatter.flpgl**.




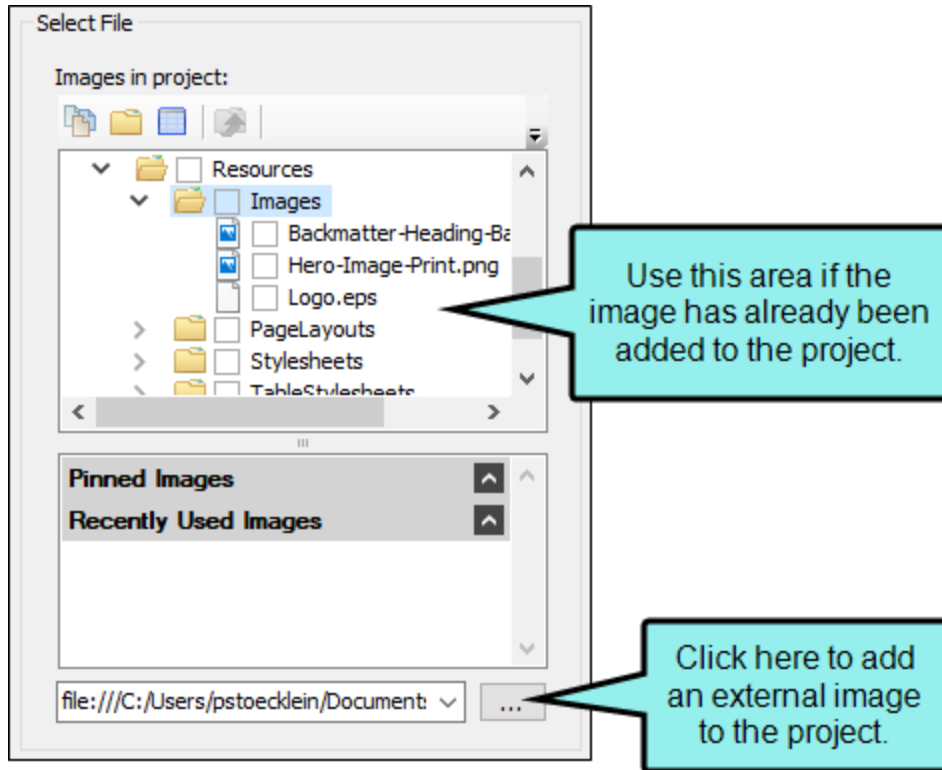
2. Double-click the frame that is displaying the image.




3. In the Frame Properties dialog, select the **Background** tab. Then in the **Image** section, click **Browse**.



4. In the **Select File** section, locate and choose your image. If you have already added your image to the project, you can select it from the top area. If you have not yet added it to the project, click  and select it (the image will then be added to the project).



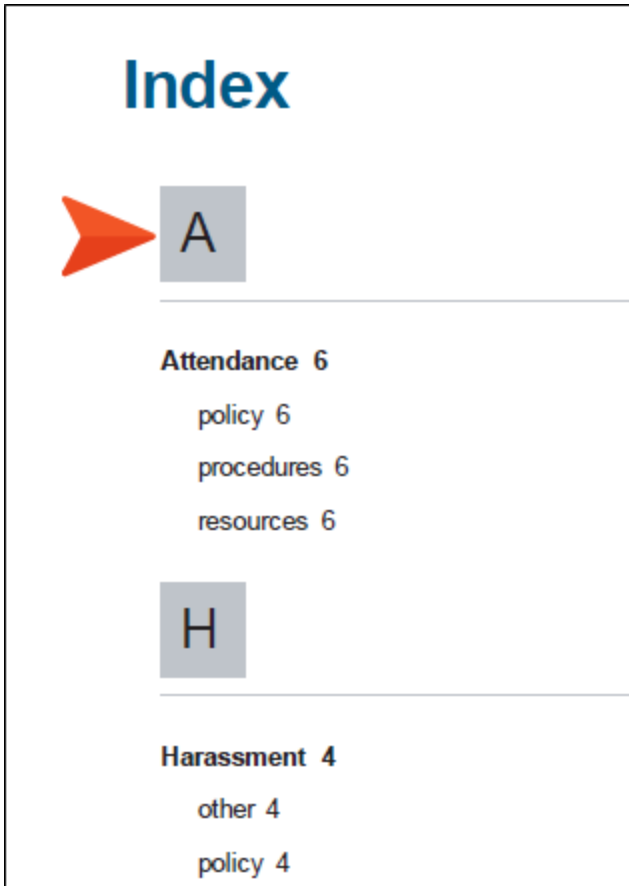
5. In the Insert Image dialog, click **OK**.
6. In the Frame Properties dialog, click **OK**.

 **Note:** If you need to resize an image so that it fits better, you will need to do so outside of Flare. Then repeat the steps above to select the updated image in the page layout. You can also experiment with the “Repeat” and “Position” fields in the Frame Properties dialog to adjust the image’s appearance.

7. Save the file.

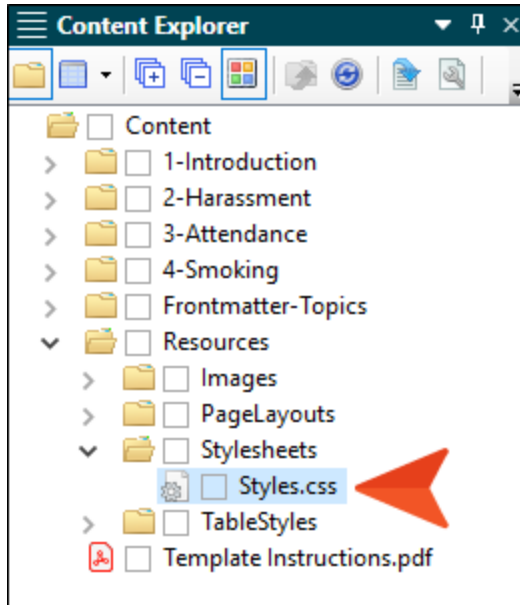
How to Change the Index Heading Background Image

The final image in this template is a small gray square, which displays behind index headings in the output.

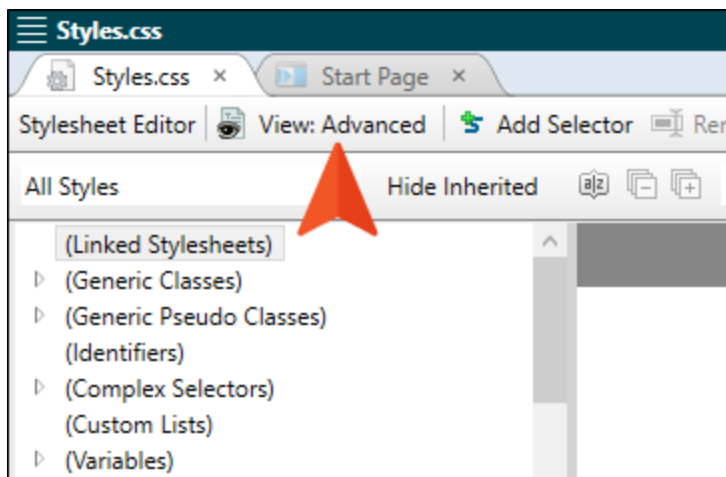


Unlike the decoration image used on the title page (which is inserted into a page layout), this image is controlled in the stylesheet.

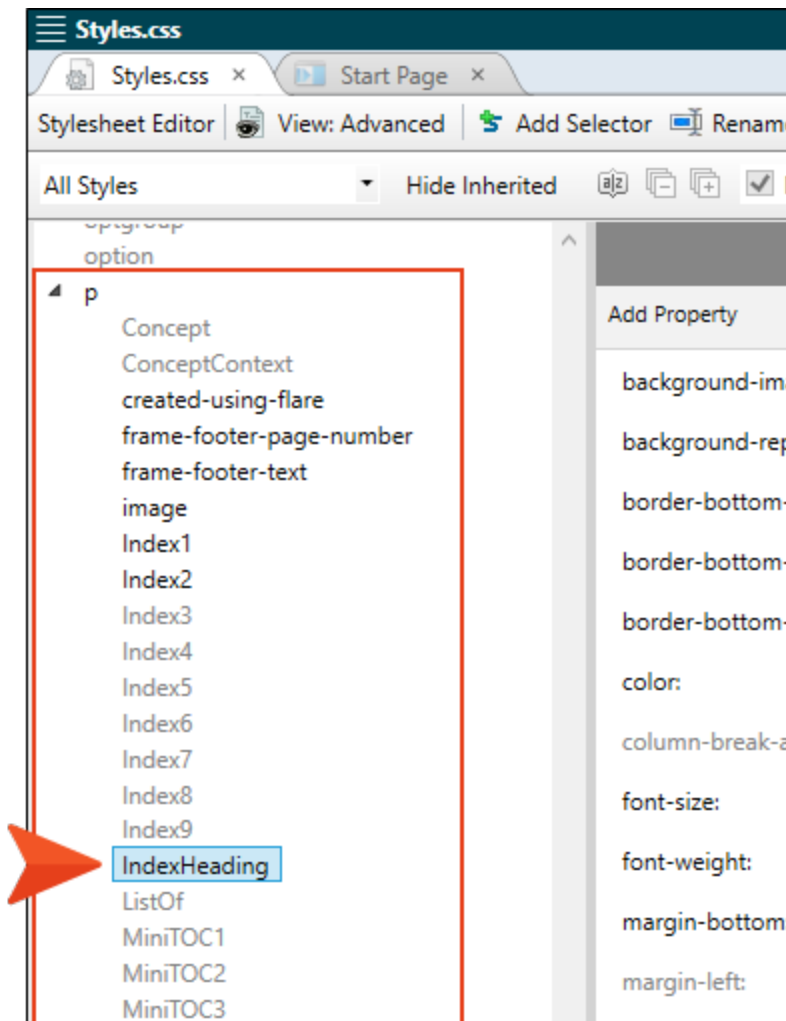
1. Open the Content Explorer, expand **Resources > Stylesheets**, and double-click **Styles.css**.



2. In the Stylesheet Editor, make sure you are in **Advanced** view.





3. On the left side of the Stylesheet Editor, find and expand the **p** group. Then select **IndexHeading**.

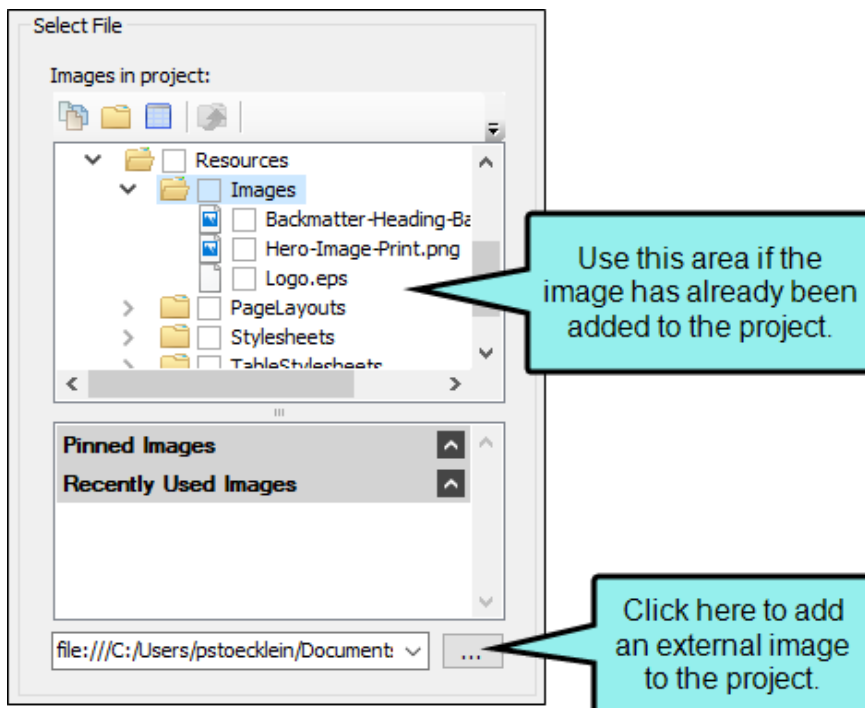


4. On the right side of the editor, next to **background-image**, click

background-image:	url('../Images/Backmatter-Heading-Background.png')	...
background-repeat:	no-repeat	...
border-bottom-color:	var(--Medium-Gray)	...
border-bottom-style:	solid	...
border-bottom-width:	1px	...

 **Note:** If you have group view enabled instead of alphabetical view, you will need to expand the **Background** group before making your changes.

5. In the **Select File** section, locate and choose your image. If you have already added your image to the project, you can select it from the top area. If you have not yet added it to the project, click  and select it (the image will then be added to the project).



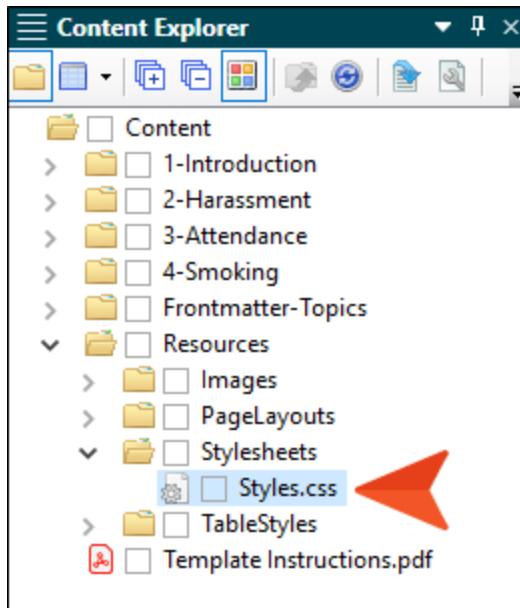
6. Click **OK**.
7. Save the file.

Changing Colors

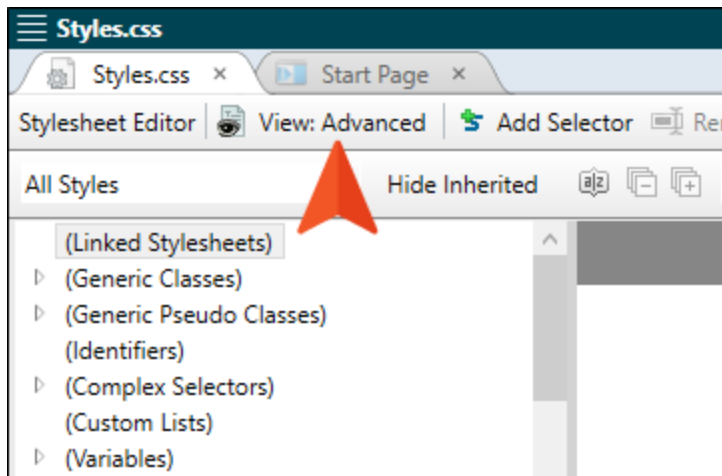
There are a few different colors used for text in this template. Two are called “Brand1” and “Brand2,” and can easily be replaced by your own company or product’s custom color. The others are black, white, or shades of gray. You can change any or all of these colors in the stylesheet. You can also change colors in the page layouts.

How to Change the Colors in the Regular Stylesheet

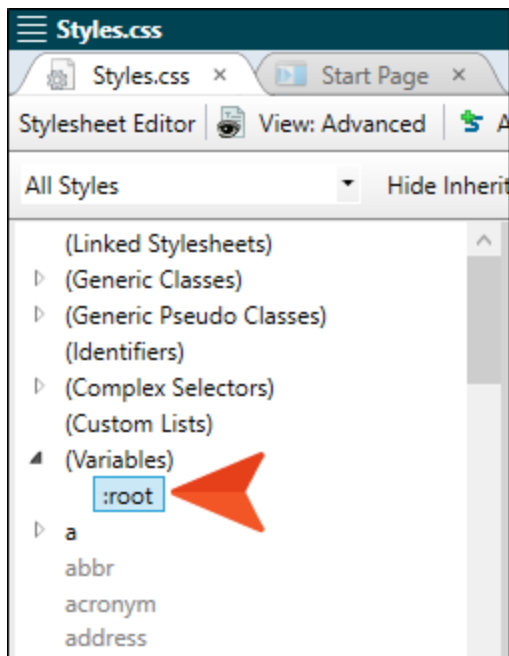
1. Open the Content Explorer, expand **Resources > Stylesheets**, and double-click **Styles.css**.



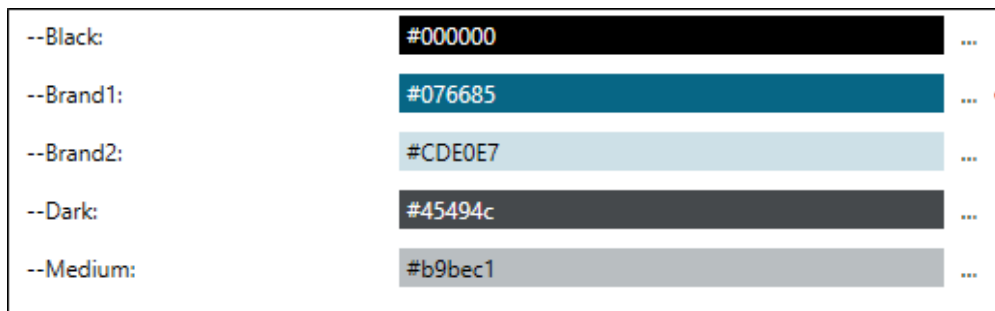
2. In the Stylesheet Editor, make sure you are in **Advanced** view.




3. On the left side, expand **(Variables)** and select **:root**.



4. On the right side of the editor, next to **--Brand1** or **--Brand2** (or any of the other CSS variables) click **...**, and use the dialog to choose a new color. These CSS variables are used for various styles throughout the stylesheet.

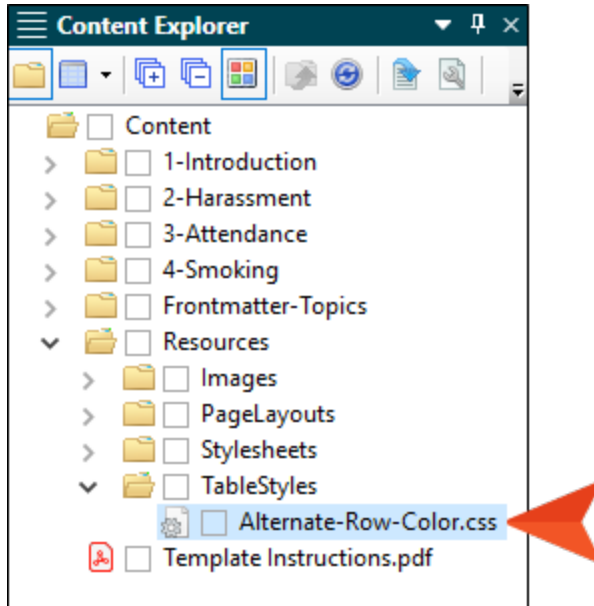


 **Note:** If you have group view enabled instead of alphabetical view, you will need to expand the **Custom** group before making your changes.

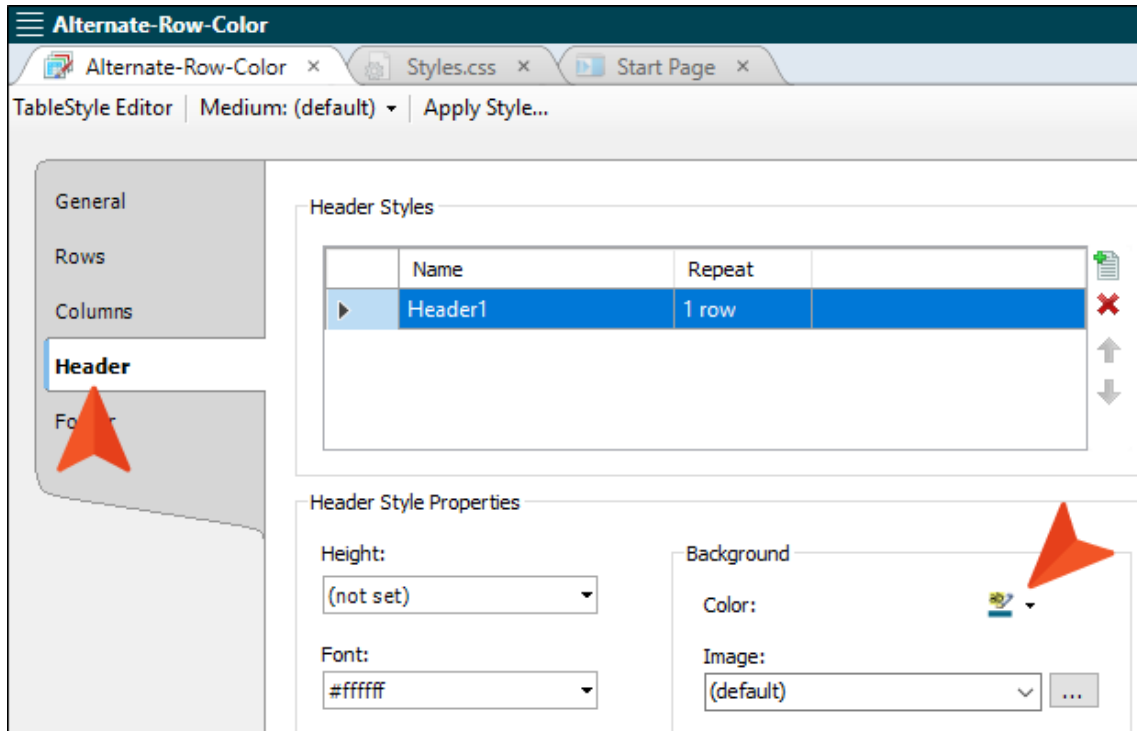
5. Save the file.

How to Change Colors in the Table Stylesheet

1. Open the Content Explorer, expand **Resources > TableStyles**, and double-click **Alternate-Row-Color.css**.



2. Use the tabs on the left to edit different parts of the table stylesheet, and edit the color in any of the appropriate fields. Most of the relevant fields are set to black, white, and gray, which you might decide to leave as is. If you want to change the “Brand1” color, select the **Header** tab, and in the **Background** section, edit the **Color** field.

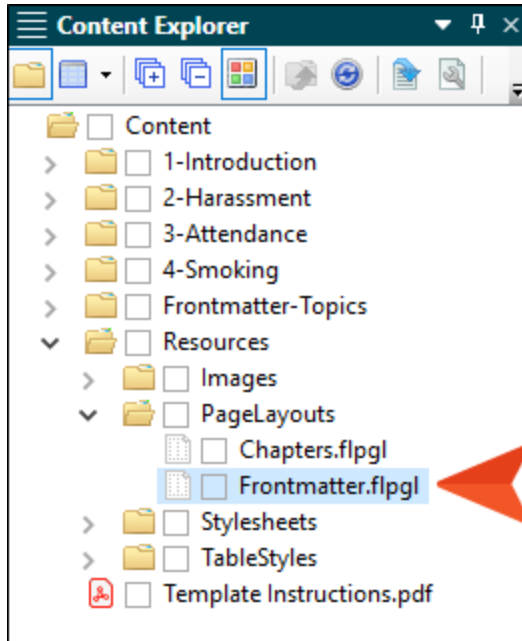


The new color will be reflected in the preview area at the bottom of the editor.

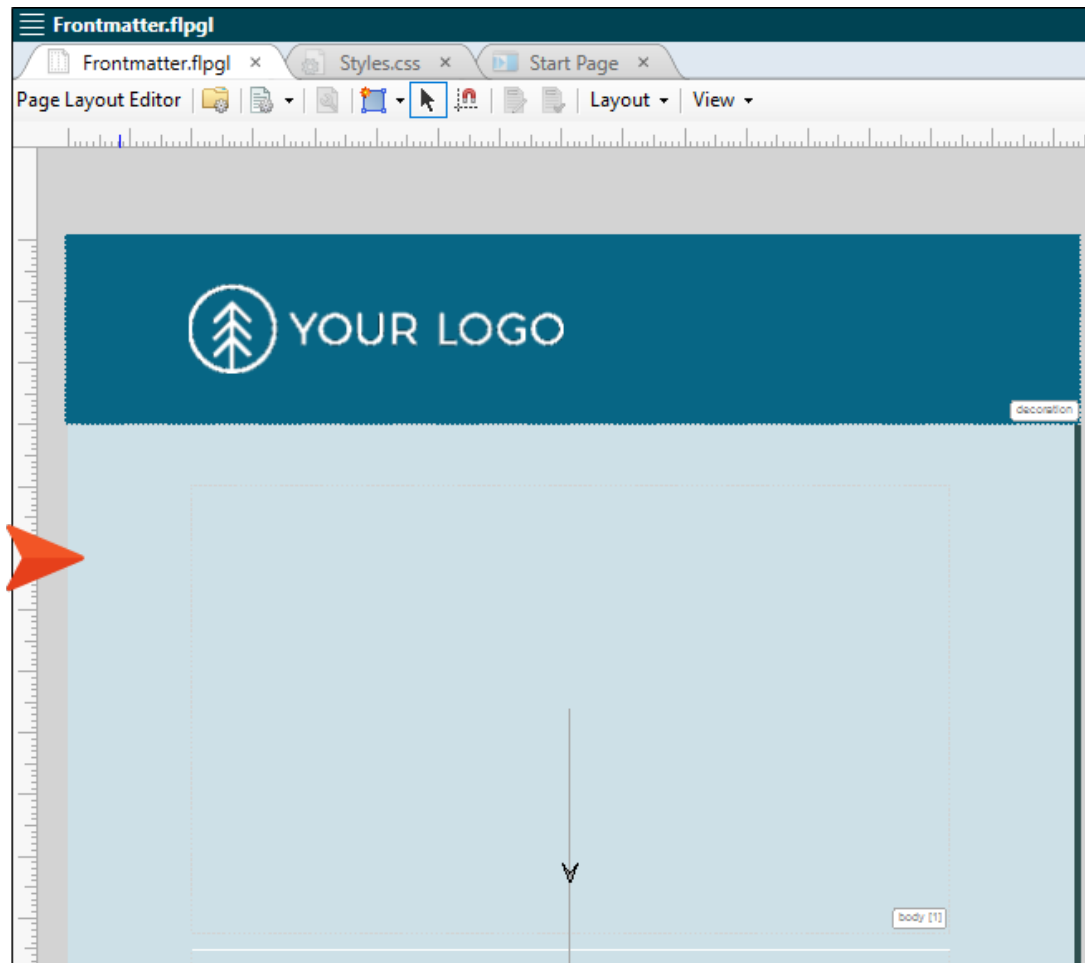
3. Save the file.

How to Change the Background Color for the Title Page

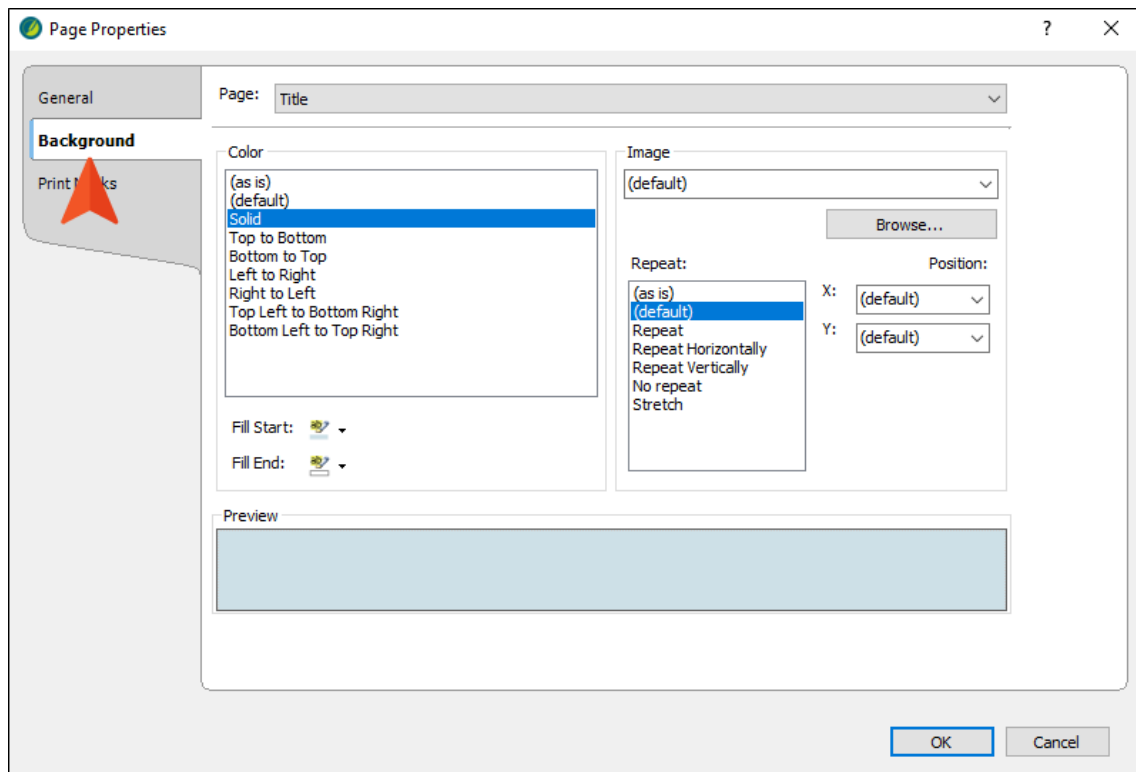
1. Open the Content Explorer, expand **Resources > PageLayouts**, and double-click **Frontmatter.flpgl**.



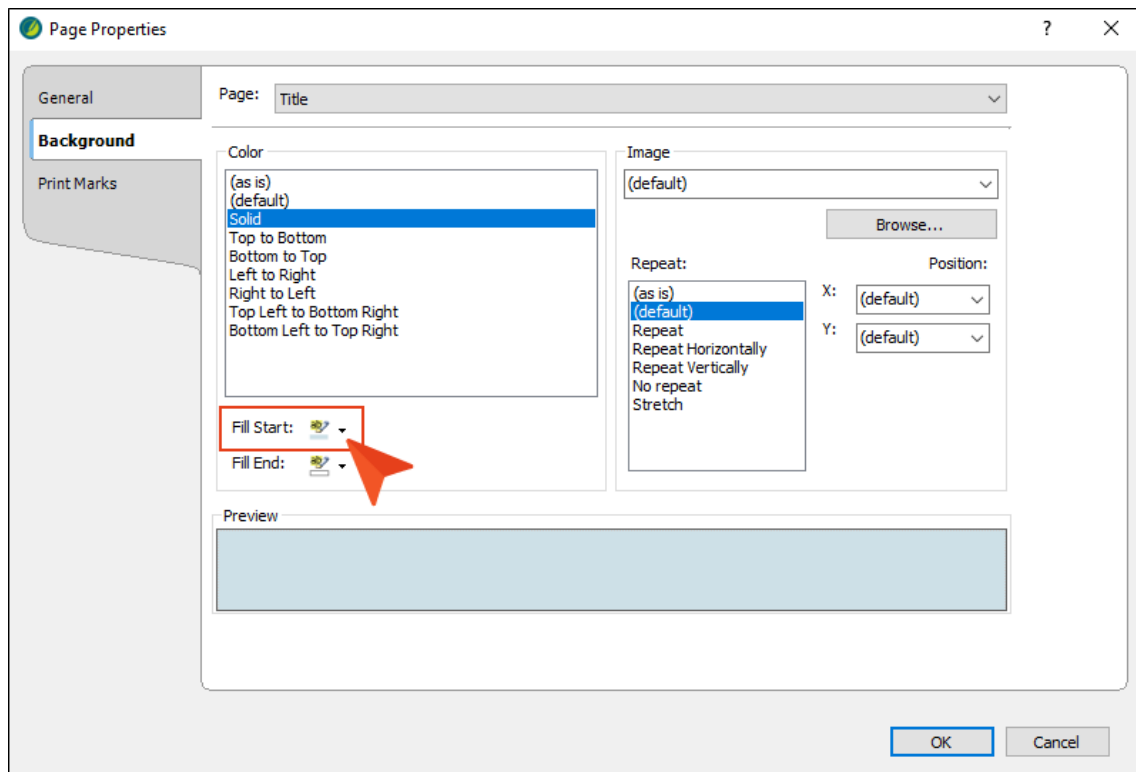
2. Double-click the light blue color in the page layout. Make sure you double-click near the edge of the page layout, instead of the middle where the main body frame is located. That way, the Page Properties dialog opens (instead of the Frame Properties dialog).



3. In the Page Properties dialog, select the **Background** tab.



4. In the **Fill Start** field, click the down arrow and choose a new color.



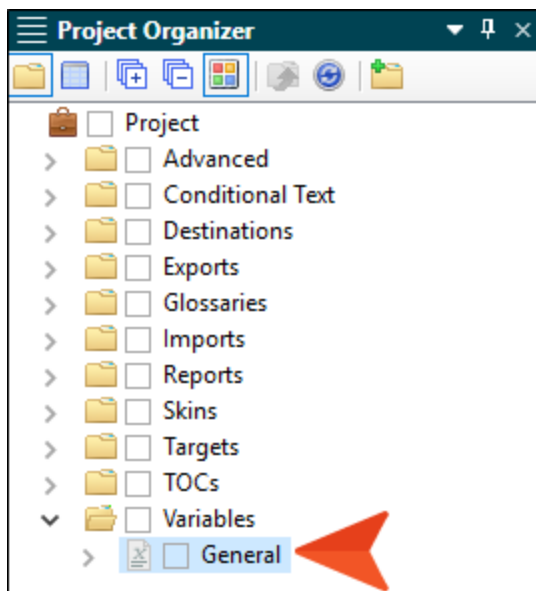
5. In the Page Properties dialog, click **OK**.
6. Save the file.

Changing Variables

You might use variables for company information, a title, the date of publication, and more. To change the definitions for the variables used in this template, edit the **General** variable set file. You can also create and insert new variables for other purposes.

How to Change Variables

1. Open the Project Organizer, expand **Variables**, and double-click **General**.



2. In the Variable Set Editor, click twice slowly in the **Definition** cell you want to change and type the new text.

The screenshot shows the 'Variable Set Editor' window with the 'General' tab selected. A red arrow points to the 'Definition' column header.

Name	Definition
CityStateZip	La Jolla, CA 92037
CompanyName	My Company Name, LLC
Email	info@yourcompany.com
PhoneNumber	858 123 4567
StreetAddress	1234 Lorem Ipsum Ave.
UserGuideTitle	Policies and Procedures
VersionNumber	1.0
Website	www.mycompanyname-hr.com
Year	yyyy

3. Press **Enter** on your keyboard.

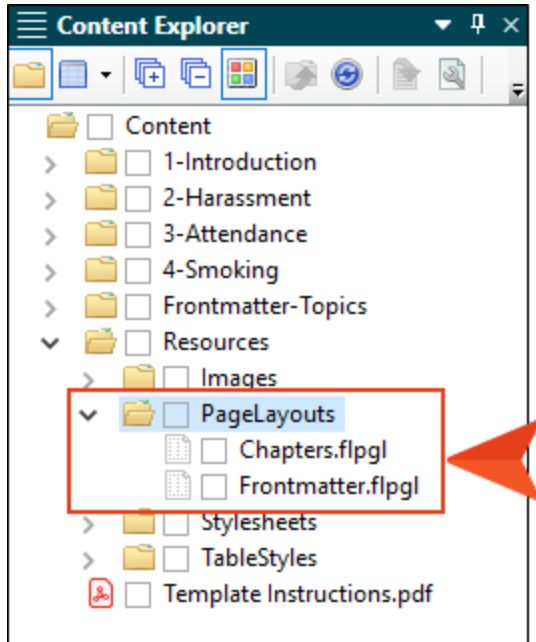
4. Repeat these steps for each variable definition you want to change. (You can also use the buttons in the local toolbar to add new variables if you like.)
5. Save the file. When you open a file where a variable has been inserted (e.g., Title.htm), you should see the new definition(s) displayed.

Changing the Layout


There are two page layouts in this template—one for the title page and TOC, the other for the rest of the pages in the PDF output, including the chapters and backmatter (e.g., glossary, index). You can make adjustments to the page layouts if you want to alter things such as the page size, margins, body frames, or footers.

How to Change the Page Layouts

1. Open the Content Explorer, expand **Resources > PageLayouts**, and double-click either the **Chapters.flpgl** or **Frontmatter.flpgl** page layout.




2. The Frontmatter page layout contains two pages, one for the title, the other for the TOC. Click the small rectangle on the right side of the editor to switch between these pages.

 **Note:** The structure for the auto-generated TOC can be changed on the second page of the Frontmatter page layout file. But the structure for the backmatter can be changed in the Chapters page layout file.

3. To make changes to the entire page:
 - a. Right-click in the Page Layout Editor and select **Page Properties**.
 - b. In the Properties dialog, select a tab (**General**, **Background**, **Print Marks**) on the left and edit the fields to change details such as the page size, margins, or background color/image.
 - c. Click **OK**.

4. To move or resize a frame within a page:
 - a. Click the frame.
 - b. To move the entire frame, click in the middle, then drag and drop it. To resize a frame, click and drag its edge.
5. To change properties for a frame within a page:
 - a. Double-click the frame.
 - b. In the Properties dialog, select a tab (**Frame**, **Columns**, **Background**, **Borders**, **Flow**) on the left and edit the fields to change details such as the frame size, padding, columns, or background color/image, and more.
 - c. Click **OK**.
6. To change the content within a frame, such as the text or page numbers in a footer:
 - a. Click the frame.
 - b. Press **F2** on your keyboard.
 - c. Use the small editor at the bottom of the interface to enter text or insert different variables.

 **Note:** If you want to change the look of the text or page numbers in the footer, you need to do so in the stylesheet. To change the look of the text shown on the left side of the footer, edit the **p.frame-footer-text** style class. To change the look of the page numbers shown on the right side of the footer, edit the **p.frame-footer-page-number** style class.

7. Save the file.

How to Customize the Frontmatter and Backmatter Pages

If you want to customize your frontmatter or backmatter (e.g., TOC, glossary, index) so that they have different layouts than the regular chapters, there are some additional tasks you will need to do. This might include the following:

1. Disable the auto-generation of the TOC, glossary, and index in the target.
2. Create separate topics for each kind of frontmatter and backmatter, and inserting proxies into them.
3. Create unique page layouts for the frontmatter and backmatter.
4. Add the frontmatter and backmatter topics to the TOC file.
5. Associate each topic in the TOC file with the proper page layout.

Please refer to the Flare online Help for more information and detailed steps.