

MadCap Flare from a User's Perspective

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About Me...

- Manager of Documentation Group at **Picis**
(Boston based, hospital software provider, ~500 employees)
- Technical Writer for 12 years
- Lots of experience with FrameMaker, Word, single-sourcing (PDF and Help) & localization
- Relatively new to Flare but involved in numerous projects (and conversions from FrameMaker)

What I am going to talk about

1. Introduction to single sourcing with MadCap Flare
2. Key decisions to make
3. Tips
4. Gotchas

What I am NOT going to talk about

- DITA
- Outputs other than PDF and WebHelp

MadCap Flare is an “XML-based publishing tool”

Q1. Do authors need to know XML?

- No

Q2. So, what does being XML-based mean?

- Files are in XHTML format

Q3. So, what are the benefits of files in XHTML format?

- Innate framework for single-sourcing to different media
- Easy to reuse content
- Easy to apply formatting
- Easy to manage templates

What I will demo

- A Flare project as seen in Explorer
- Elements of the Flare interface
- Simple workflow for creating Webhelp:
 - i. Create/edit topics
 - ii. Create/edit a “Flare TOC”
 - iii. Create/edit a Skin
 - iv. Configure the Webhelp “target” as needed
 - v. Create the output
- Simple workflow for creating a PDF:
 - i. Create/edit topics
 - ii. Create/edit a “Flare TOC”
 - iii. Add a cover page, “print TOC” and IX to the Flare TOC
 - iv. Set chapter breaks, numbering, page layouts
 - v. Configure the PDF “target” as needed
 - vi. Create the output



DEMO

Key Decisions to Make (1)

- Flat structure vs. folders
- Image Location: Topic folders vs. Resources/Images folder
- Multiple Flare TOCs vs. one TOC with conditioned topics
- Standard list styles vs. autonumbered classes
(...and list classes versus paragraph classes)
- Table stylesheets vs. table tags in standard CSS

Key Decisions to Make (2)

- Print TOC: Headings from Flare TOC vs. from styles
- Page layout headers/footers: Variables vs. normal text
- Conditions: Apply to words, sentences or paragraphs?
- Skin for WebHelp: Default vs. custom
- Global Project Linking
- Policy for resizing graphics (css)

Tips (1)

- Target: Set target to PDF for previewing a PDF topic rather than rebuilding the PDF
- Target: Avoid using the terms “user guide”, “manual” etc in the name of an online target
- CSS: Use a single CSS with different media (print etc.) rather than a different CSS per target
- CSS: Use the “default” medium for online styles rather than the “non-print” medium
- CSS: Put the **@media print** section at the top and indent the style definitions
- CSS: Set default font size for Body & td tags not p tag

Tips (2)

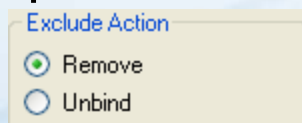
- Context Sensitive Help: Ask developers to code ID numbers in help calls (e.g. '10'), not identifiers (e.g. "Print_Window")
- Context Sensitive Help: Ask developers not to specify the Webhelp skin name in help calls.
- Tables: To use p classes in a cell put the cursor in cell and press ENTER.
- HTML file <Title> tags:
 - Used in search results and IX entries in Webhelp
 - Best practice for localization and maintenance:
In Topic Properties, leave the **Topic Titles** field blank; in the TOC set **Auto-set title of linked file** to **Yes**.

Minor Gotchas / Issues in version 5.0 (1)

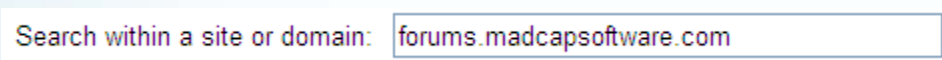
- FrameMaker Import: Add table styles to non-table part of a Frame doc
- TOC styles: Autonumbering must come from associated heading; TOC styles cannot be independently numbered
- Tables: Online and print styles must be applied separately (and the print style applied even if it seems to be already)
- Tables: Table styles do not change in Flare when you change media – whether you see the online or print style depends on the medium used for viewing when the table was created.
- Tables: Better to create tables styles for indented tables rather than editing a table's margins directly in the code.

Minor Gotchas / Issues in version 5.0 (2)

- Default Skin: In the target, 'default' is the skin alphabetically first in "Project\Skins"; in the Properties window for a TOC item, 'default' is the skin for the target.
- CSS: Focus issue in Simplified View.
- FrontPage: Leaves "benign" hidden folders with topics inside.
- Index: Index styles (e.g. p.Index1) do not wrap by default. To fix: set white-space to "normal" (default is "nowrap").
- Conditions: Even if not in the TOC a topic in your content folder is still accessible from Webhelp. Use condition to hide.
- Conditions: The Conditions window sometimes shows the Exclude Action pane even when it is not relevant



Resources

- MadCap Forums:
<http://forums.madcapsoftware.com/>
- MadCap Forums alternative for unrestrained searching:
http://www.google.com/advanced_search?hl=en

- W3Schools tutorials for CSS, XHTML:
<http://www.w3schools.com/>



Thank you for listening!

For further questions/comments please contact me
via my LinkedIn web page:

<http://www.linkedin.com/in/adrianmorse>