

# FLARE 6 – A REVIEW BY ED MARSHALL

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Flare 6, released early this year, is the latest version of the state-of-the-art help authoring tool produced by MadCap Software.

The major new features of Flare 6 include:

- A new **WebHelp Mobile** output format for mobile devices
- Capability to batch generate and publish your output formats
- Ability to assign writers/status to topics (called file tagging). You can generate custom reports showing the workload for each writer on the team or generate a list of topics with a selected status.
- Enhancements to creating/modifying index entries
- A new GUI option to view links to/from topics, called **Link Viewer**
- Other usability/workflow enhancements
- Capability to import multiple HTML files into a Flare project (previously you had to import them one at a time)
- Ability to import RoboHelp 8 projects into a Flare project
- Enhancements to Flare's integration with commonly-used source control software

MadCap provides a very useful “What’s New in This Version” topic in the help for all of their products that provides a complete list and a very useful discussion of the new features of that release.

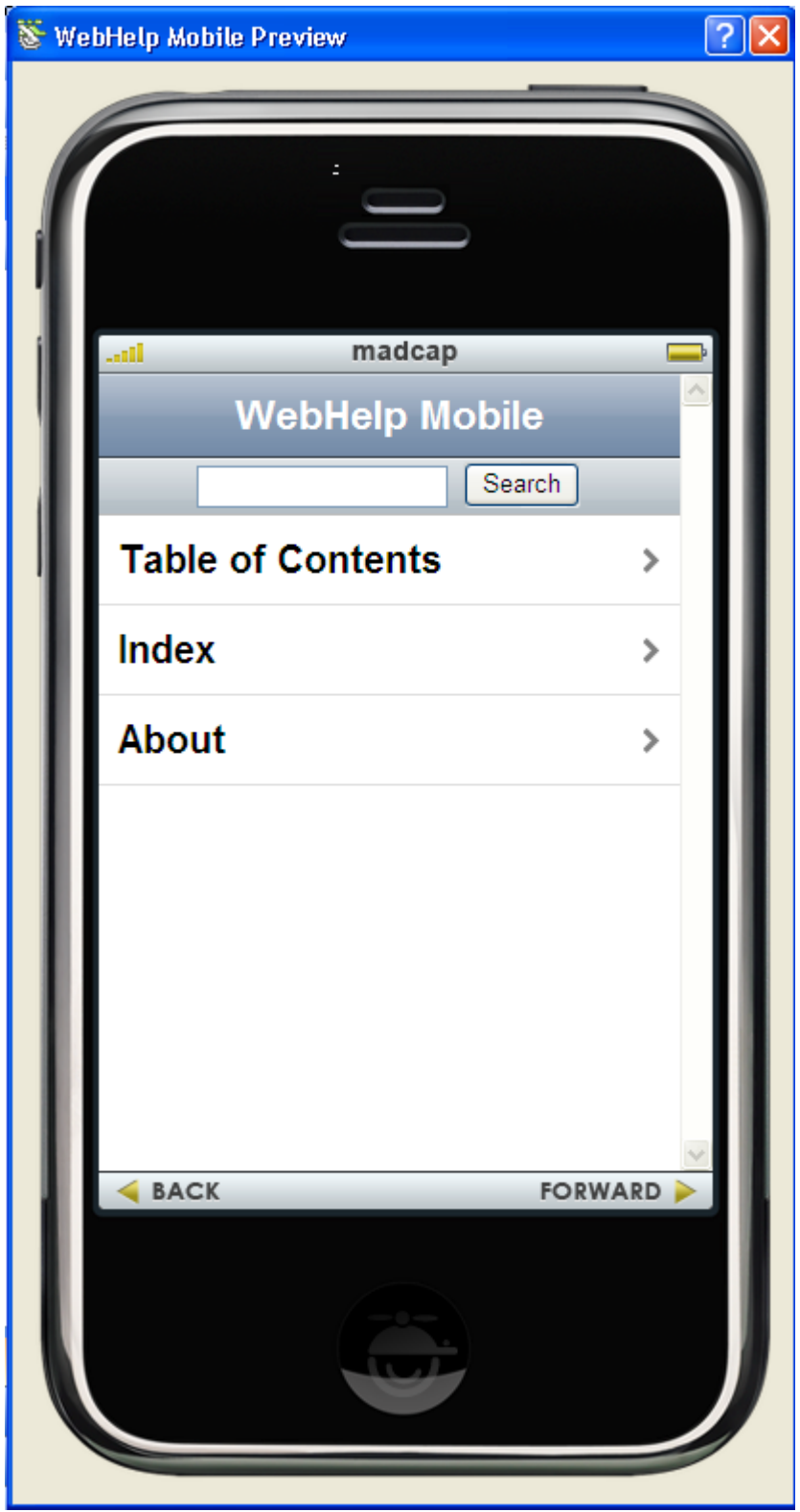
This article will discuss several of these new features and provide examples of how/why you might use them.

## Producing WebHelp for Mobile Devices

The new WebHelp Mobile output format (output formats are called *targets* in Flare) enables you to deploy a set of Web pages (in XHTML format) to mobile devices. The target is designed to work on very small screens. From the home page, you can access the typical navigation panes such as TOC, Index, Glossary, Search, Favorites, and Browse Sequences. A key advantage of this output is that it is platform independent. This means that your output will work on a variety of mobile devices, including iPhone, Windows Mobile, and Blackberry. This helps you avoid the problem of having the output format tied to

one platform while other platforms are not supported. This is a huge advantage to help developers. You don't need to care what platform your users are using.

The following shows a default home page for the **WebHelp Mobile** target (output).



## ***Design Considerations***

This target is designed to automatically flow and resize the line length to accommodate the viewing area of the mobile device. You don't have to do any special formatting or coding for this to happen.

You might have to modify screenshots, graphics, or tables if they are wide. Those constructs will still appear in your output but the user might have to scroll so much that the elements become essentially unusable. One approach is to conditionalize large constructs such as graphics or tables for the limited screen size of mobile devices. That is, you would have a full-sized version of these elements for your help outputs for PCs and a much smaller, possibly redesigned version that you conditionalize to only include in the **WebHelp Mobile** target.

Additionally, if the mobile device is turned from a vertical orientation to a horizontal orientation, the text will automatically reflow to better fit the changed dimensions of the viewing area.

The preview view of the **WebHelp Mobile** target output is very helpful to writers. It allows you to test and debug your help projects for this new output even if you don't have a mobile device to test your output. You can navigate the preview view just as you would if you viewed it on an actual mobile device so you can see what elements / designs need to be customized to be usable on a mobile device.

There are a few limitations to this target, mainly due to limitation in mobile browsers:

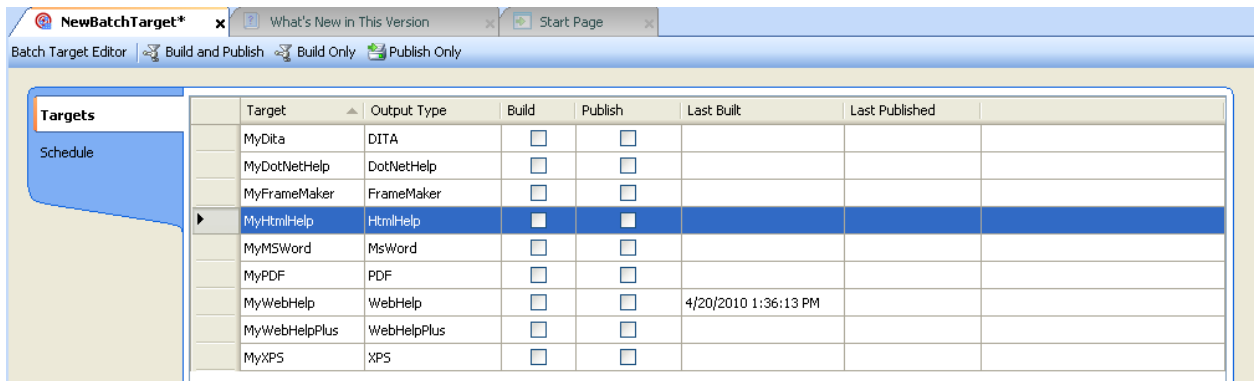
- Audio and movies are supported if the mobile browser supports them.
- Search features such as including/excluding topics in search, stop words, and synonyms are only supported in the newer Mobile Browsers.

## **Generating and Publishing Multiple Output Formats**

With Version 6, you create a batch or "*master*" target that consists of several output formats or targets. This is useful if you have multiple output formats, such as WebHelp and PDF that you want to build on a regular basis. Instead of setting up an automated build for each of those targets, you can now set up a master build that will run all your output formats. You can customize the build and select options for each target within the master build, which gives you tremendous flexibility. As with the individual builds you used to use and still can, you can always make changes to the builds within the master build.

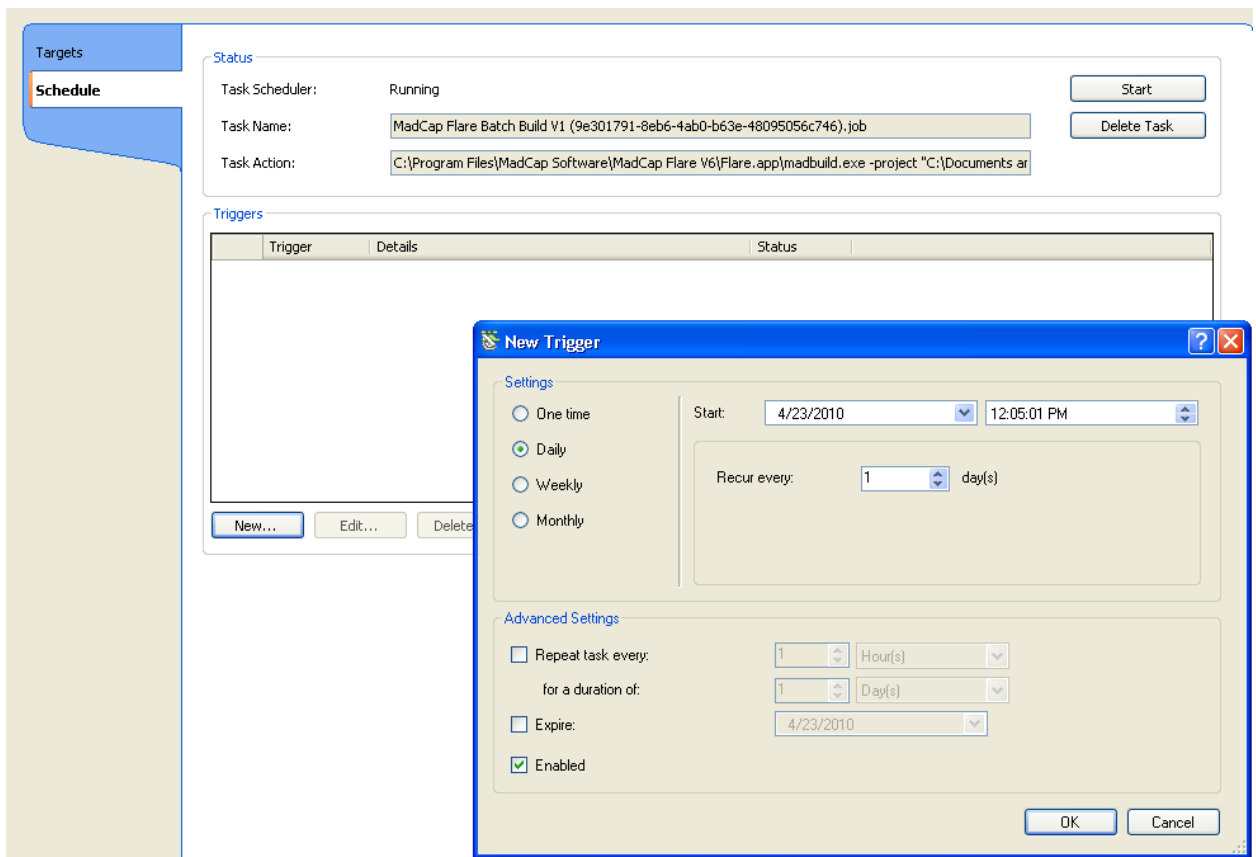
The steps involved:

1. Create a batch target, such as "MyBatchJob". The following shows the default **MyBatchTarget** window:



- Optionally, set a time when the batch job will start. For example, you might want the job to run every night at 2 a.m. or some other time when you won't be using your computer to minimize disruption to you and minimize the elapsed time for the specified targets to build. Flare not only builds all your targets but also copies the output files to the specified publish directories.

You use the **Schedule** window to create a schedule for your batch job:



**Note:** Once you set up this schedule, you don't have to leave Flare open with your projects open to have the scheduler run. Also, Flare automatically generates and saves a report of any

problems running the batch job so you can easily troubleshoot any problems when you come in the next morning.

3. Save your **BatchTarget**. It will appear in the list of **Targets** in the **Project Organizer**.
4. Optionally, you can always kick off a manual build of your batch job. Just click your **BatchTarget** in the list of **Targets** in the **Project Organizer**. In the **BatchTarget** window, click one of the tabs on the top to **Build and Publish**, **Build Only**, or **Publish Only**.

You can easily make changes to when a batch job runs, what targets to build, or how often to run.

This feature can be very helpful if you have multiple targets such as WebHelp, HTML Help, and PDF, and you want to always know that your builds are successful. This is similar to the build systems that developers use to always have a current kit reflecting the latest changes to software and a regularly scheduled verification that the build compiles successfully.

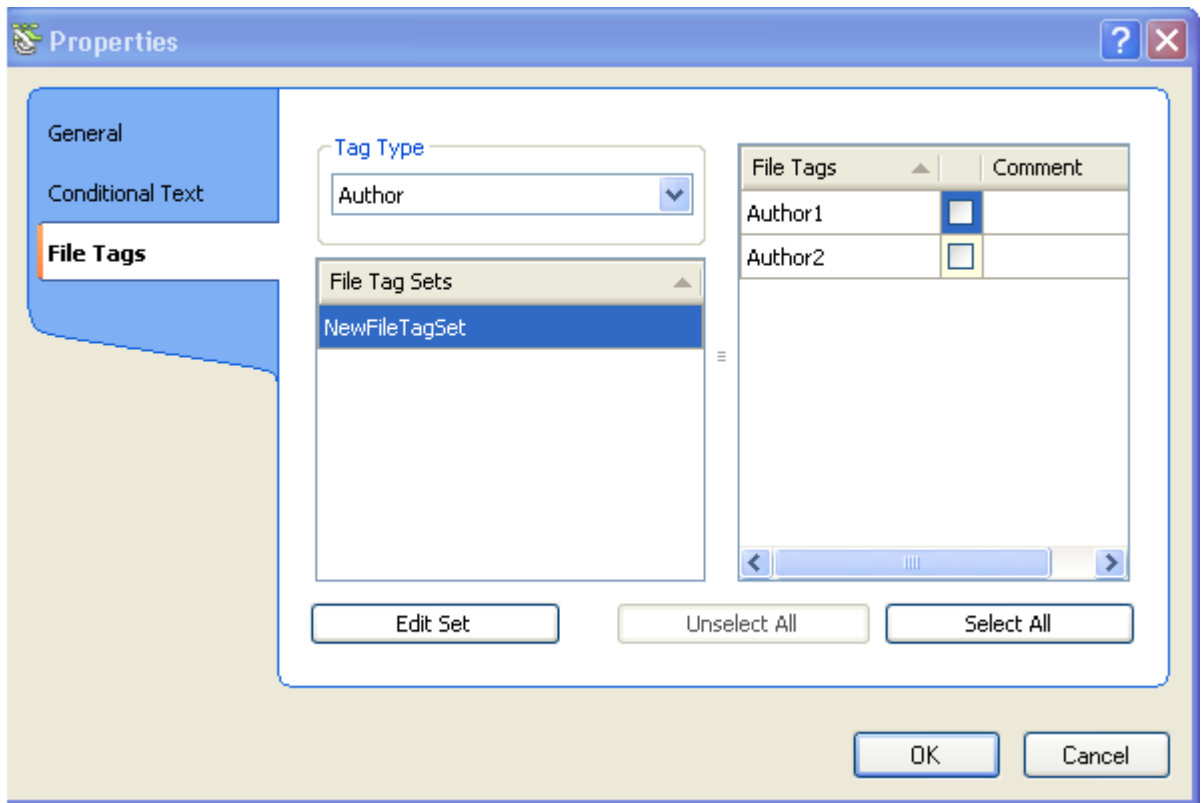
## Assigning Topics to Authors Using File Tagging

With this feature, you can add as many authors as you need for a help project and assign them to topics.

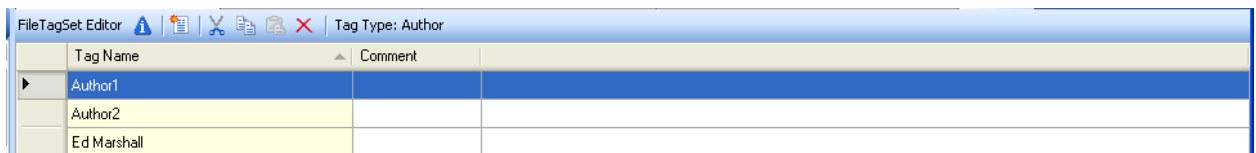
Once you've added authors, assigned topics to them, you can then easily generate a customized report showing each writer's workload, and other useful information.

To add authors:

1. In the **Project Organizer**, select a target.
2. Right-click the selected target and select **Properties**.
3. In the **Properties** dialog, select **File Tags** on the left. The default is to display the **Author** tags with 2 pre-defined authors: **Author1** and **Author2**.

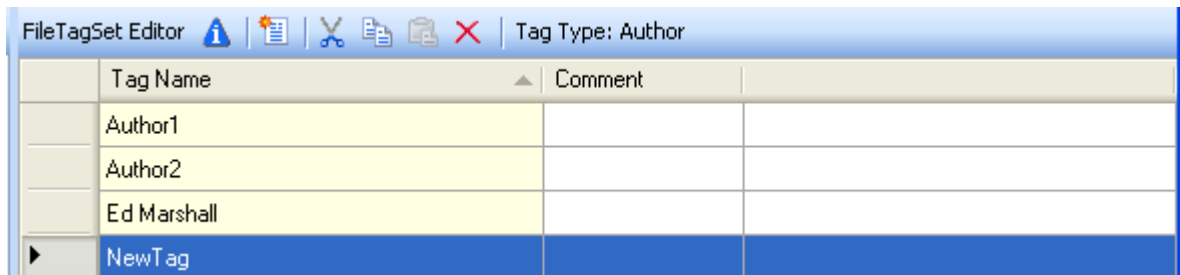


4. To add or remove writers from the target, ensure **Author** is selected in the Tag Type dropdown.
5. Click **Edit Set** to display the **FileTagSet Editor**.



You can easily add new tag names, delete the defaults, etc.

6. To add a new author, click the **New Item** icon (the second icon to the right of **FileTagSet Editor** in the toolbar above the **Tag Name / Comment** headings. Flare inserts the default text of **NewTag** in a new row at the end of the current list. Select the **NewTag** text and enter the author name to be added.



7. When you are finished, click the **OK** button to apply your changes.

## Assigning Status to Topics Using File Tagging

With this feature, you can add as many **Status** types as you need for a help project and assign them to topics.

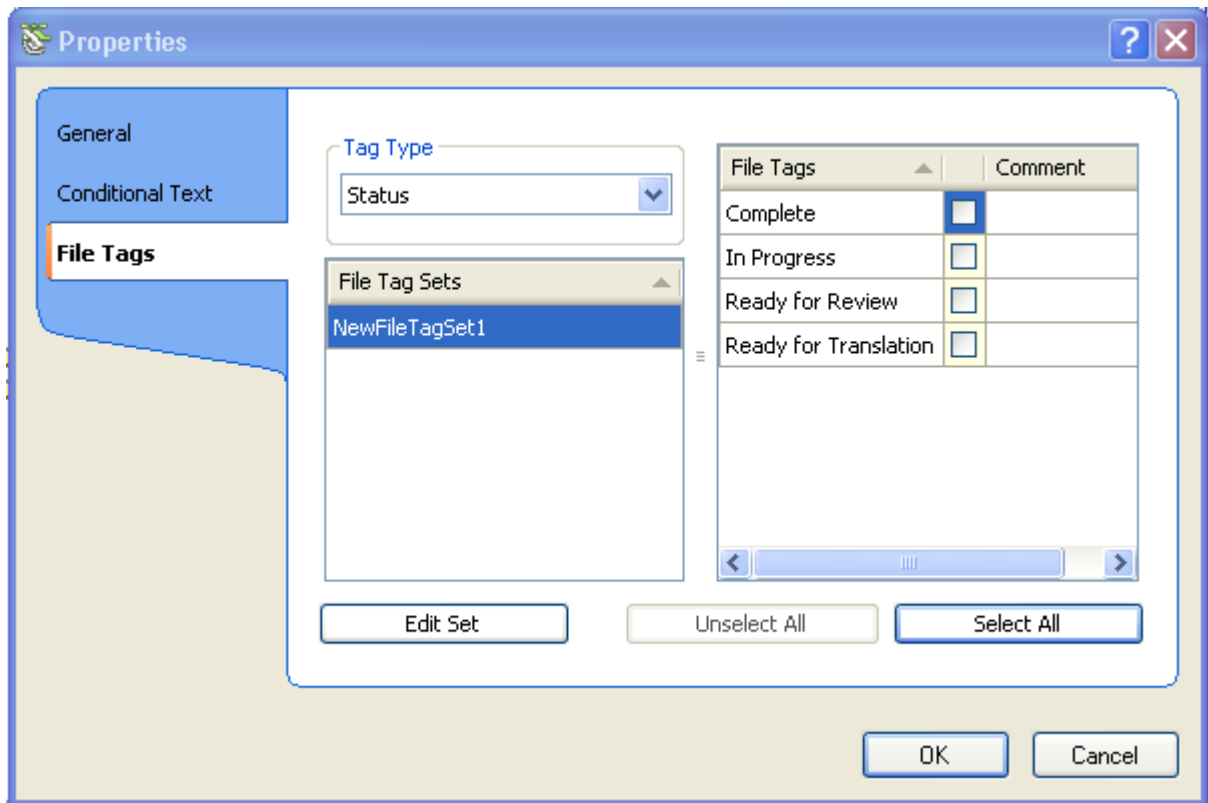
Once you've created the status types you need, you can then easily generate a customized report showing the status of projects and other useful information.

To create custom status types:

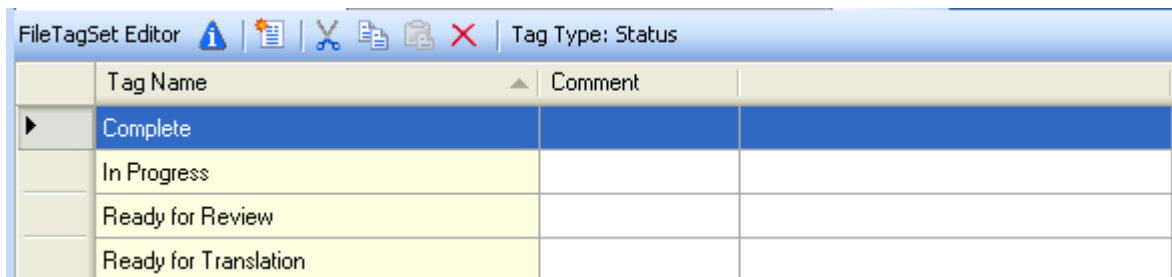
1. In the **Project Organizer**, select a target.
2. Right-click the selected target and select **Properties**.
3. In the **Properties** dialog, select **File Tags** on the left.

To see the pre-defined Status tags, click the **Tag Type** dropdown and select **Status**. The following shows the default **Status** tags of **Complete**, **In Progress**, **Ready for Review**, and **Ready for Translation**:





4. To add or remove **Status** types from the target, ensure **Status** is selected in the **Tag Type** dropdown.
5. Click **Edit Set** to display the **FileTagSet Editor**.



You can easily add new tag names, delete the defaults, etc.

6. To add a new **Status** type, click the **New Item** icon (the second icon to the right of **FileTagSet Editor** in the toolbar above the **Tag Name / Comment** headings. Flare inserts the default text of **NewTag** in a new row. Select the **NewTag** text and enter the new **Status** type.

Tag Name	Comment
Complete	
In Progress	
<b>NewTag</b>	
Ready for Review	
Ready for Translation	

- When you are finished, click the **OK** button to apply your changes.

### ***Generating Status Reports for a Flare Project***

You can easily generate a **Status Report** for your Flare project using the **Reports** option found in the **Project Organizer**.

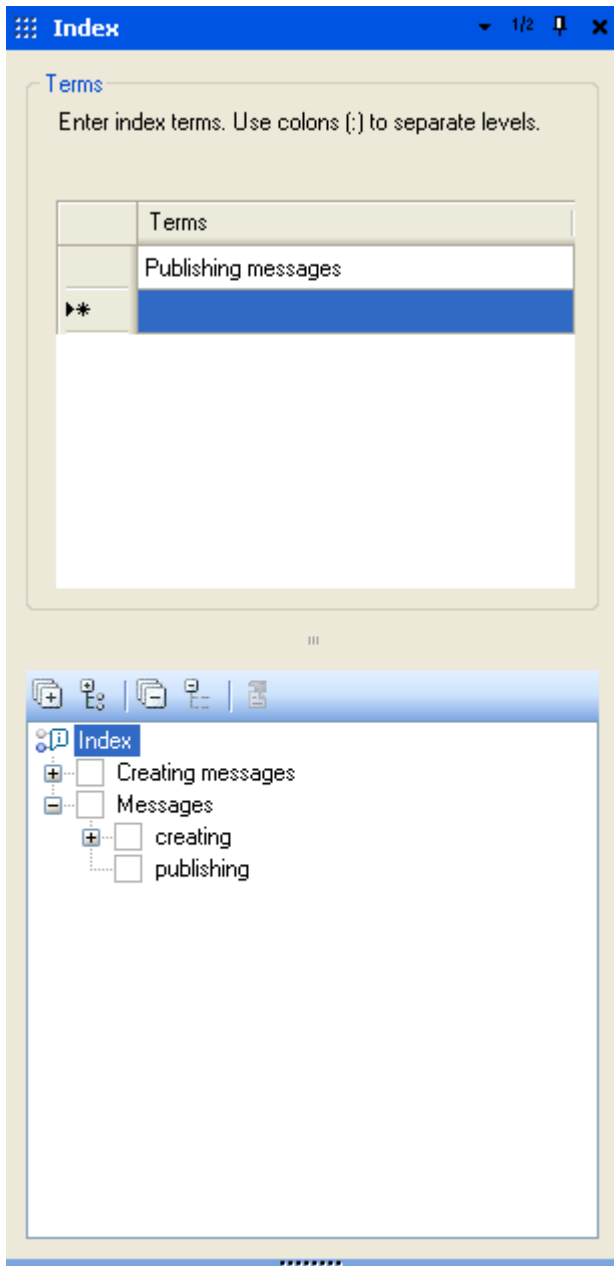
Flare 6 provides a handy and easy-to-use **Review** toolbar. You can also generate a view of all the files in your project with several columns displaying **Name**, **Path**, **Size**, **Date Modified**, **Status**, **Author**, **Status**, and many others. Consistent with MadCap’s philosophy of making your workflow easier, you can select which columns you want to display in the **File List**. For the purposes of viewing status and sending selected files off for review or other actions by other members of your team, you would select **Name**, **Author**, and **Status** as your columns.

For example, if you want to send all the topics that have a status of **Ready for Review**, you could sort the **Status** column. Then select all the topics that are **Ready for Review**. Flare provides a **Send Topics for Review Wizard**. The wizard provides an e-mail template, partially filled in with an appropriate subject and a default message, requesting the recipient(s) review the attached topics. You specify the recipient’s e-mail address and click **Send**. So much easier than how I tracked topics in a help system years ago and hand-collated the lists of topics to review.

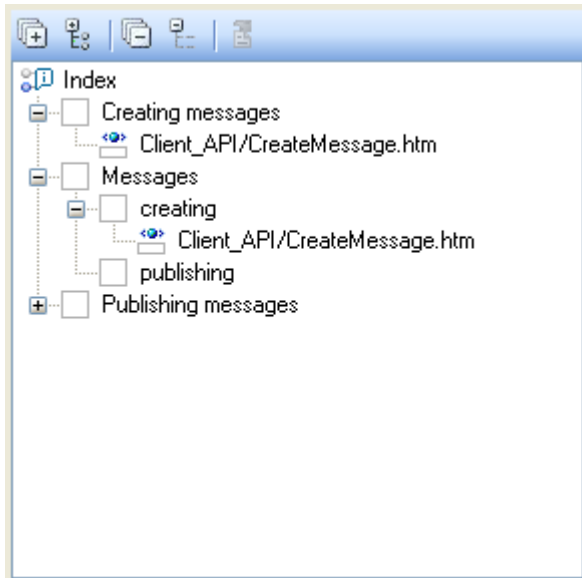
### **Enhancements to Creating/Manipulating Index Entries**

It is much easier to add index entries in Flare 6 with the new **Index** window. You add index entries/sub-entries in the top pane. The bottom pane shows you all the index entries in your project. The topics containing an index entry will be listed under the appropriate index entry in the bottom pane.

The following shows a new index entry “Publishing messages” being added to the index:



One benefit of this new window is that you can easily drag and drop topics onto index entries in the Index window which results in those index entries being added to those topics. For example, if I drag a topic name CreateMessage.html to the previously created “Creating Messages” and “Messages, creating” index entries in the bottom pane, you would see the following in the bottom pane. You also see the new index entry “Publishing messages” appearing in the bottom pane now.



Note the CreateMessage.htm file under the “Creating Messages” index entry. After you save the CreateMessage.htm, it will have an index entry of “Creating Messages” added to it.

One easy way to use this new feature is to position the **Index** window alongside your list of topics in your project (in the **Content Explorer**). You could have a dedicated indexing session where you add index entries to the **Index** window. Then you could just drag and drop topics from the **Content Explorer** to the index entries you created. This approach could result in a very comprehensive index with not just syntactical entries (a list of function names) but actual tasks (such as creating or publishing messages).

## Viewing Links to/from Topics

The **Link Viewer** feature gives you a more complete view of links to and from a selected topic. You can open any of the files listed in the **Linked From** or **Linked To** columns to open those files for editing.

You can also view which targets are linked to a file so you know what outputs will change if you make changes to the content of that file.

A nice enhancement to the link checking capability is that you can lock the current view. This is useful if you need to browse several files to determine potential changes to them. By default, the **Link Viewer** will automatically refresh to show the **Links From/Links To** the new selected topic. But if you lock the **Link Viewer**, the display is frozen to the selected topic when you lock the **Link Viewer** so you can backtrack all the links from/to that topic while keeping a static view of your starting topic.

As you might expect, this feature also displays any broken links with the customary red x.

This feature is a big improvement over the **Show Dependencies** feature of earlier versions of Flare.

## Other Usability Enhancements

The **Skins Editors** have been enhanced to only show settings that apply to that skin type.

The **Skins Editor** also includes options for the new WebHelp Mobile output.

The **Target Editor** has been enhanced to only show settings relevant to that target type. For example, **PDF options** now only appear for the **PDF Output Target**.

Each target listed in the **Targets** list has an appropriate and easily recognizable icon associated with that target so you don't have to open the **Target Editor** to see the type for that target name.

It is much easier to create a template for a file. Now, you can save an existing file or project as a template. It is also easier to manage your template files, such as adding them, creating template folders, and editing template files.

Customizing WebHelp toolbars and the **Topic toolbar** is much easier now. Flare provides a set of the most commonly used default options. You can easily exclude any of the default options. A nice touch is Flare added a new button in the **Editor** that allows you to add a separator lines between a subgroup of related options.

## Importing multiple HTML files at once

You can now import multiple HTML files into your Flare project. You might need this if you are adding content from SMEs or other sources. Previously, you could only import HTML files one at a time.

## Importing RoboHelp 8 Projects

Flare can import Adobe RoboHelp 8 projects into Flare. All of your RoboHelp content will be converted to the appropriate Flare constructs.

## Enhancements to Flare's Integration with Commonly-used Source Control Software

Flare 6 makes several enhancements to its integration with source code control software, such as Microsoft Visual SourceSafe (versions 2005 and the venerable 6.0) and Microsoft Team Foundation Server.

Flare provides the following enhancements:

- Flare now displays two new icons to indicate the following status of files:
  - New files added to your project that haven't been added to your source code control system.

- Files in your project that are not current with the latest version in your source code control system. This alerts you that you need to update your local version of those files to be current with the project.
- You can now merge changes between two versions of a file within Flare. When you try to check in a changed file, Flare checks to see if any other changes were made to that file, such as by another writer). If the two versions are different, Flare displays a dialog where you can merge the changes. If there are no conflicting changes between the two files, Flare offers the option to **Auto Merge All**. If there are conflicting changes, Flare offers a choice of merging the changed files in the new **Merge Changes** tool. Or you can discard your changes and accept the other writer's changes or discard the other changes and keep your changes.
- Flare now provides icons that show the status of your files such as files that are checked out by other users or files that are out of date (your local copy is older than the copy in the source code control tool).
- The **Check-In** and **Undo Check-Out** dialogs now allow you to display only the files that have changed. This can be helpful to show you a subset of your project with only the changed files displayed, instead of all the files in your project, which can be confusing to determine which files actually need to be checked-in.

## Summary

Flare 6 is a very well done major release of the state-of-the-art help authoring tool from MadCap software. **WebHelp Mobile** is an important new feature that technical writers should investigate. With the proliferation of mobile devices and social media, I think the area of user assistance for mobile devices is going to take off. Some recent evidence supports this conclusion. At the recent WritersUA conference, there were two full-length presentations about writing for mobile devices and a demo by Neil Perlin at the MadCap booth. I've also gotten at least 2 inquiries in the past month for contract jobs working on mobile devices.

I'm especially impressed with the usability improvements in this version of Flare. It's not often that makers of a mature product will revisit their workflows to see if these are really efficient. The MadCap people deserve praise for the improvements in this area that make it easier to work more productively with Flare.

A full-featured trial version of Flare 6 is available from <http://www.madcapsoftware.com/downloads/?p=PFL>. Note that trial versions randomly scramble characters to prevent people from deploying outputs to a shipping product. But the trial version has all the features of the product.

Along with Flare, MadCap also makes several other tools that are completely integrated with Flare.

MadCap Capture is a very good screen capture tool. It is easy to use. A nice feature in it is that you can capture scrolling regions and you can then scroll in your captured image. I found this very helpful when I installed a buggy build at a client and got a long error listing in a CMD window. I used Capture to get an image of all the messages to send to the development team so they could diagnose the problem. I used Capture to save the screenshots used in this article.

MadCap Analyzer is a very handy tool that will scan your Flare project and suggest improvements such as repeated text that could be coded once as a snippet and reused as needed and variables (such as product names). So you only need to edit the snippet/variable once and the instances where it is included in your project are automatically updated.

MadCap Mimic is their offering for producing software simulations. They have several other tools also. See [www.madcapsoftware.com](http://www.madcapsoftware.com) for those.

Thanks to Anthony Olivier (MadCap CEO) and Mike Hamilton (VP of Product Development) for providing a copy of Flare 6 to review and information on the new features, Sharon Burton (Flare Consultant) for an excellent webinar highlighting the changes in Flare 6, Neil Perlin (Certified Flare Trainer) for an excellent demo of the new **WebHelp Mobile** output, and Cheryl Landes for doing a thorough edit of this article.

## About the Author

Ed Marshall is an independent technical writing consultant and sole proprietor of [Marshall Documentation Consulting](#), with more than 22 years of experience. He specializes in APIs/SDKs (application programming interfaces/software development kits), Web services products, and other types of documentation aimed at developers. Throughout his career, Ed has developed expertise in using tools to "let the computer do the work," such as advanced tools for editing files, comparing files, and searching and replacing text in files.

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