I Just Bought Flare

Where Do I Start?!
Who Am I?

  • Internationally recognized content consultant.
  • MadCap-certified Flare trainer/consultant since pre-v.1.
  • Helps clients create effective, efficient, flexible content, from hard-copy to mobile.
  • Also certified in Mimic, Viziapps, other tools.
The Problem

» Flare has a load of features, *and* some major new ones in 12, that can leave you flailing if you’re new.

» Where to start?
A Recommendation

» 8 minimum steps that will enable:
   • Clean creation of your first project.
   • Consistent creation of additional projects.

» What follows is based on 11 years as a Flare certified trainer/consultant and 21 years of hypertext work prior to Flare.

» But always consider your specific needs.
Those 8 Steps...

1. *Project* your outputs forward.
2. Plan for version control, if possible.
3. Plan for a master/child project structure.
4. Create topic type templates, maybe...
Those 8 Steps (cont’d)...

5. Create control file folders in Resources.
6. Create a CSS based on the templates.
7. Create 1+ table CSSs.
8. Set standards wherever possible.
Project Your Outputs

» Project and prioritize your outputs.

- To avoid using features that work well in some outputs but may not others, like Help Controls or expanding links.
- To avoid setting up project structures like TOCs with many heads that work nicely in tripane but less so in topnav.
Project Your Outputs (Cont’d)

» Set firm policies against hacks and local formatting to ensure smooth transitions to new outputs.
Plan for Version Control

» Lets you put projects in a central repository and create local copies on authors’ PCs.


» Flare supports various tools natively.
Version Control Alternatives

» No version control? Consider an alternative – don’t just leave projects on local PCs.

» Project on a backed up shared drive with Flare on C drive.
  • Work speed depends on network traffic, no VC benefits but project *is* backed up.
Version Control Alt’s (Cont’d)

» Project and Flare on C drive, project copied periodically to backed up shared drive.
  • Like first option but without network issues.
Plan for Master/Child Structure

» Lets you create a master project containing standard files that child projects are to use.
  • Syncs child projects to the master.
  • Download shared files from master to child.
  • If master or child author changes the file, Flare re-downloads the master version.

» Provides semi-invisible consistency across projects.
Plan for Master/Child Structure

» Set up via the Flare Project Import feature.
Flare Project Import Feature
Plan for Master/Child Structure

» Name projects to clearly indicate their role in the hierarchy – e.g. Widget Help Master, Widget A Child, Widget B Child, etc.

» Carefully define the structure, number of hierarchy levels, files to use in each level.

» Document the structure to avoid “zombie projects”.
Create Topic Type Template(s)

» Analyze your content to define the standard types, like concept, procedure, reference.
  • *Doesn’t mean DITA.*

» Use the types’ elements to create standard topic type templates, if needed...
Create Template(s) (Cont’d)

» Add the templates to Flare’s interface using the Template Manager feature.
Template Manager

[type the real title here]

[Delete this text and replace it with your own content]

Bill of Materials

[type the list here, pressing enter after each item]
Define Control File Folders

» Predefine subfolders in Resources for control files that don’t automatically get one, like table CSSs – here.

» Eliminates hunting for a control file in 100s of topics under the (Content) root.
Create the CSS

» To programmatically control formatting in a project and eliminate local formatting.

» Can be based partly on the elements defined in your topic templates, if any.

» Make the CSS the master to automatically apply it to all new topics – Project > Project Properties > Default tab.
  • Provides automatic consistency across projects.
Create the CSS

» An impressive/terrifying number of options.
CSS Suggestions

» At a minimum...

• After defining your CSS, don’t mess with it.
  – Unless you have to...

• Aim to put all style code in the CSS, none in the topic.

• Don’t change de facto standards – link settings.
CSS Suggestions (Cont’d)

- KISS and consider maintainability – !important property saga.
- Stay out of the code.
- Document it.
Create the Table CSS(s)

» Like a regular CSS but specifically for tables.
» Can be automatically applied to all tables in a project with a few mouse clicks.
» Define how many table types, and thus table CSSs, you’ll need – the fewer, the better.
  • Provides automatic consistency across projects.
Set Standards

» Set standards for:
  • Conditional build tag usage.
  • Variable and snippet usage.
  • Level of single sourcing granularity.
  • Graphic file formats.
Set Standards (cont’d)

• Index entries.
• Wording (can be controlled by variables or made adaptive via CSS code).
• Link types – hyperlinks vs. cross-references.
• File naming conventions.
• Anything else…
Other Steps

» Plan to use Analyzer, if you bought it.
» Document your project settings.
» Ignoring the clear self-interest, get trained.
  • A class has made a lot of the mistakes for you.
» Join a user group if there’s one near you.
The Goals

» Create controls and standards that apply across one or more projects and authors.
  • You can then focus on creating project-specific control files and content.

» Start your Flare work under control and keep it there.
Hyper/Word Services Offers...

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