Maximizing Re-use Within MadCap Flare

PRESENTED BY:
Matthew Ellison, Director | UA Europe
BEFORE WE GET STARTED...

The webinar will be recorded and emailed to all registrants

Use the Question Panel in GoToWebinar to ask questions throughout the webinar
Matthew Ellison

- Consultant and trainer for User Assistance tools and technologies since 1993
- User of MadCap products since 2006
- Certified Flare Instructor
- Based in the UK
What we’ll cover in this webinar

- What do we mean by maximising re-use?
- Brief survey of Flare re-use features
- Focus on Snippets and Variables
  - Creating
  - Using
  - Sharing
- Overriding snippet and variable content in a range of wonderful ways
What do we mean by re-use?
Re-use

- Write once, use many times
- Content:
  - Word or phrase
  - Paragraph or content chunk
  - Topic
- Assets:
  - Style sheet
  - Master page
  - Skin, etc.
What do we mean by maximizing re-use?
Maximizing re-use

- Take all reasonable opportunities for re-use

- Can we go too far?
  - additional management time must be < saved maintenance time
  - paragraph-level or higher
  - localization can be an issue
Flare features that support content re-use

- Snippets
- Glossary Term
- Conversion
- Master Pages
- Variables
- Project Linking
- Page Layouts
Focus on Snippets and Variables

- What do they have in common?
- What are the key differentiating aspects?
## Comparing Snippets and Variables

<table>
<thead>
<tr>
<th></th>
<th>Variables</th>
<th>Snippets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Content type</td>
<td>String of plain text</td>
<td>Chunk of XHTML</td>
</tr>
<tr>
<td>Typical size</td>
<td>Small</td>
<td>Typically larger (but &lt; topic)</td>
</tr>
<tr>
<td>Examples of use</td>
<td>Product name</td>
<td>Warning</td>
</tr>
<tr>
<td></td>
<td>Phone number</td>
<td>Common steps</td>
</tr>
<tr>
<td>File type</td>
<td>.flvar</td>
<td>.flsnp</td>
</tr>
<tr>
<td>Storage location</td>
<td>Project&gt;Variables</td>
<td>Content</td>
</tr>
</tbody>
</table>
# Comparing Snippets and Variables

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Can override variable definitions in Targets!
Two distinct types of snippet

- Block-level
- Inline (< 1 para)
Creating a snippet

- Can create from existing topic content
Inserting a snippet

- Must insert block-level snippet into an empty paragraph
- Drag snippet from Context Explorer
- Can pin frequently use snippets
- Snippets as re-usable content templates
Viewing snippet usage
Sharing snippets between projects

- Cut and paste – what’s wrong with that?

- Project linking:
  - Related projects
  - Adhoc/opportunistic
  - Top-down

Need conventions for naming and categorization
Sharing between related projects

Project A

Project B

Project C

Project D

Flare Project Import File

ProjectA.flprj

*.flsnp
Adhoc/opportunistic sharing

- Project A
- Project B
- Project C
- Project D
- Flare Project

Import File
- ProjectD.flprj
- Example1.flsnp

Flare Project Import File
Global project

- Project B
- Project C
- Project D
- Project A
- Global

Global.flprj
*.flsnp

Flare Project Import File
Alternative – External Resources

- Two-way synchronization
- Lack of central control
Variables

3 different types
- System
- Custom text
- Date/Time
Inserting a custom text variable

- Type first three characters of definition
Sharing variables between projects

- Separate **shared** variables from **project-specific** variables.
Shared variables with project-specific definitions

- Can’t redefine within Project A variable set
- Instead, define within Target
### Defining variables within Target

#### Variable Set Editor

<table>
<thead>
<tr>
<th>Name</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>CityPostcode</td>
<td>Romsey, SO51 &amp;JH</td>
</tr>
<tr>
<td>CompanyName</td>
<td>UA Europe</td>
</tr>
<tr>
<td>PhoneNumber</td>
<td>+44 844 504 2521</td>
</tr>
<tr>
<td>ProductName</td>
<td>[Enter product name in target]</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>20 Cupernham Lane</td>
</tr>
<tr>
<td>Version</td>
<td>[Enter version number n.n in target]</td>
</tr>
<tr>
<td>Year</td>
<td></td>
</tr>
</tbody>
</table>

#### Target Editor

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</tr>
<tr>
<td>ProductName</td>
<td>FictionSoft</td>
</tr>
<tr>
<td>StreetAddress</td>
<td>20 Cupernham Lane</td>
</tr>
<tr>
<td>Version</td>
<td>1.3</td>
</tr>
<tr>
<td>Year</td>
<td>yyyy</td>
</tr>
</tbody>
</table>
Final piece of re-use flexibility: Customizing the content of snippet instances
Changing variable definitions...

DEMONSTRATION

Variable redefined for this instance of the snippet
Changing other content within snippets...
<table>
<thead>
<tr>
<th>Date</th>
<th>Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 January</td>
<td>New Year's Day</td>
</tr>
<tr>
<td>2 January</td>
<td>2nd January</td>
</tr>
<tr>
<td>19 March</td>
<td>St Patrick’s Day (substitute day)</td>
</tr>
<tr>
<td>30 March</td>
<td>Good Friday</td>
</tr>
<tr>
<td>2 April</td>
<td>Easter Monday</td>
</tr>
<tr>
<td>7 May</td>
<td>Early May bank holiday</td>
</tr>
<tr>
<td>28 May</td>
<td>Spring bank holiday</td>
</tr>
<tr>
<td>12 July</td>
<td>Battle of the Boyne (Orangemen's Day)</td>
</tr>
<tr>
<td>6 August</td>
<td>Summer bank holiday</td>
</tr>
<tr>
<td>August</td>
<td></td>
</tr>
<tr>
<td>30 November</td>
<td>St Andrew's Day</td>
</tr>
<tr>
<td>25 December</td>
<td>Christmas Day</td>
</tr>
<tr>
<td>26 December</td>
<td>Boxing Day</td>
</tr>
</tbody>
</table>
Select Snippet Conditions in Topic Properties

Properties

General
Topic Properties
File Tags
Conditional Text
Snippet Conditions
Snippet Variables
Language

Condition Tag Sets
(show all tags)
Country Snippet Conditions
Default
Platform Snippet Conditions

Tags
England and Wales
Northern Ireland
Scotland

Include
Exclude

☑️

☑️
Calender of Scotland

Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

2018 Bank Holidays in Scotland

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Benefit of Snippet Conditions

- We can create larger, more flexible, easier-to-maintain snippets
## Alternative solution without Snippet Conditions

### 2017 Bank Holidays in Northern Ireland

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Summary

- Flare has a range of features that support content re-use
- Snippets and variables can make content creation and update more efficient, as well as ensuring consistency
- Consider storing shared snippets and variables in a global project
- Variables can be redefined in targets and snippets
- Consider using snippet conditions for increased flexibility
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