Navigation 101: A Guide to Links in MadCap Flare

PRESENTED BY:
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Hyper/Word Services
BEFORE WE GET STARTED...

The webinar will be recorded and emailed to all registrants

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Who Am I?

• Neil Perlin - Hyper/Word Services.
  – Internationally recognized content consultant.
  – Help clients create effective, efficient, flexible content in anything from hard-copy to mobile.
  – Certified – Flare, Mimic, Viziapps, others.
  – Certified app development consultant and trainer.
  – Lynda.com® author of training for Flare 12, others.
Flare’s link types
Insertion and customization
Pros and cons
Some general design notes
Hyperlinks
Hyperlinks

Here's a standard hyperlink to topic B.

Here's a cross-reference (xref) to Topic B.

Here's a topic popup to Topic B.

Here's a text popup.

Welcome to topic B.
Insertion and Customization

- Insert – Use Insert > Hyperlink, or press Ctrl/K, or click Insert Hyperlink icon on toolbar.
- Customize – Use “a” in the CSS.
Pros and Cons

◆ Pros:
  – Can link from anything to anything.
  – Familiar.

◆ Cons:
  – Takes readers out of their reading path.
  – A maintenance problem if the target’s title changes.
  – Author must type and edit the link text.
  – Link style format is fine for online targets but what happens in print targets?
  – One possible answer…
Cross-References (xrefs)
Cross-References (xrefs)

Here’s a standard link to topic B.
Here’s a cross-reference (xref) to Topic B.
Here’s a topic popup to Topic B.

Welcome to topic B.
Cross-References (xrefs)

- Changing the target topic title from “Topic B” to “Topic X” does *this* to the xref text.
The update is automatic across the entire project when you build.

Don’t want to wait until you build? Select Tools > Update Cross-References.
Insertion and Customization

- **Insert** – Use Insert > Cross-Reference, or press Ctrl/Shift/R, or click Insert Cross-Reference icon on toolbar.

- **Customize** – Use “MadCap | xref” in the CSS.
Pros and Cons

◆ Pros:
  – Automatically changes the link text as the target title changes.
  – Automatically changes from a link format in online targets to a page reference format in print targets.
  – Works for jumps and popups.

◆ Cons:
  – Can only be used between topics in the same target – can’t be used for jumps to external URLs or files.
Automatic Format Change

- Based on the medium.
Setting the Format
Popups – Topic and Text
Topic Popups

- Supported in HTML5 tripane but not yet in TopNav or SideNav – feature requested.
Insertion and Customization

- **Insert** – Use Insert > Hyperlink or Cross-Reference and select Popup Window for the Target Frame field.

- **Customize** – Use “Popup” sub-class of “a” in the CSS.
Pros:

- Good for short pieces of content like a phone number or showing interim steps in a larger procedure without taking the reader out of the task path.
- Can automatically display a glossary term’s definition in popup form when that term appears in a topic.
- Popup links in multiple topics can use one topic as the link target so maintenance is easy – make any changes in one place.
Pros and Cons

- **Cons:**
  - Windows controls where a popup opens.
  - A popup opens *on top of* the starting topic so it may cover content.
  - New users may be unsure how to close a popup in order to keep reading in the primary topic.
  - Popups in targets running on mobile devices become hyperlinks, a problem if your design is based on using popups *as* popups.
Text Popups

Topic A

Here's a standard hyperlink to topic B.
Here's a cross-reference (xref) to Topic B.
Here's a topic popup to Topic B.
Here's a text popup.
Here's an expanding text link.

Topic A

Here's a standard hyperlink to topic B.
Here's a cross-reference (xref) to Topic B.
Here's a topic popup to Topic B.
Here's a text popup.
The tech support phone number is 111-555-1212.
And, finally, here's a toggle.

Insertion and Customization

- Insert – Use Insert > Text Popup.
- Customize – Use “MadCap | popupHead” in the CSS for the link, “MadCap | popupBody” for the popup itself.
Pros and Cons

◆ Pros:
  – Short and simple code.

◆ Cons:
  – Opens on top of the link so it may cover content.
  – Each text popup is a separate code instance; changing it in multiple places is a maintenance headache.
  – Popups in targets displayed on mobile devices convert to hyperlinks, same design problem as before.
Dropdowns
Dropdowns

Here's a topic popup to Topic B.
Here's a text popup.

Here's an expanding text link.

Here's a dropdown link.

And, finally, here's a toggler.

Here's a topic popup to Topic B.
Here's a text popup.

Here's an expanding text link.

Here's a dropdown link.

And, finally, here's a toggler.
Insertion and Customization

◆ Insert – Use Insert > Drop-Down Text.
  – Insert > Dropdown Hotspot creates the hotspot and adds “(This is the dropdown text)” as a placeholder for you to modify.

◆ Customize – Use “MadCap | dropDownHotspot” in the CSS.
Pros and Cons

◆ Pros:
  – Like a popup but the body displays in a “stretched-down” area of the screen so dropdowns don’t cover other content like popups do.

◆ Cons:
  – None I can think of but I’m open to other opinions.
Expanding Links
(aka Slideouts)
Expanding Links

Here's a text popup.

Here's an expanding text link.

Here's a dropdown link
And here's the body for the dropdown link.

And, finally, here's a togglor.

Here's a text popup.

Here's an expanding text link (where the text slides out to the right).

Here's a dropdown link
And here's the body for the dropdown link.

And, finally, here's a togglor.
Insertion and Customization

◆ Insert – Use Insert > Expanding Text.
  – Insert > Expanding Hotspot creates the hotspot and inserts a blank block in which to add the body.
    » Select Show Tags > Show Markers to see it.

◆ Customize – use “MadCap | expandingHead” and “MadCap | expandingBody” in the CSS.
Pros and Cons

◆ Pros:
  – Simple code.
  – Good for short, text-only content like short glossary definitions.

◆ Cons:
  – Text-only.
  – Something about reformatting a paragraph on-the-fly seems to bother people.
Togglers
**Togglers**

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**Topic A**

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Here's a topic popup to Topic B.

Here's a text popup.

Here's an expanding text link (where the text slides out to the right).

- Here's a dropdown link.
  - And here's the body for the dropdown link.

And, finally, here's a togglor.

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Here's a cross-reference (xref) to Topic B.

Here's a topic popup to Topic B.

Here's a text popup.

Here's an expanding text link (where the text slides out to the right).

- Here's a dropdown link.
  - And here's the body for the dropdown link.

And, finally, here's a togglor.

**Steps**

1. Do this.
2. Do that.
3. Do the other thing.
Insertion and Customization

- **Insert** – Use Insert > Toggler.
- **Customize** – Use “MadCap | toggler” in the CSS.
Pros and Cons

◆ Pros:
  – Like a dropdown but can show or hide any content anywhere and at the reader’s discretion.

◆ Cons:
  – Requires multiple steps – creating the content, naming the content to be togglerized, creating the toggler, and assigning the content to the toggler.
Some General Design Notes

- Hyperlinks and xrefs are good to link to related content but bad if the link is in the middle of a procedure – easy for readers to lose their place.
  - Use popups, dropdowns, or togglers instead.
- Need to run targets on mobile devices? Popups convert to hyperlinks.
- Importing old Word or FrameMaker documents into Flare? Get rid of underlining used for text emphasis.
  - Readers will think they’re links.
Some General Design Notes

- Single-sourcing to online and print targets? Use xrefs, not hyperlinks, to get the page reference format in the print.
- Think twice before customizing your link styles away from what people are familiar with.
  - From OWL Guide to WinHelp to HTML Help.
- Where to place links in a topic – top, bottom, or in-context?
In other words, lots of link options beyond standard hyperlinks and popups.
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Thank you... Questions?

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