

Reporting Features in Flare and Analyzer



Who Am I?

- ◆ Neil Perlin – Hyper/Word Services.
 - Internationally recognized content creation and delivery consultant.
 - Help clients create effective, efficient, flexible content in anything from print to mobile.
 - Certified – Flare, Mimic, other tools.
 - Many years experience trying to keep track of what's going on in my projects.

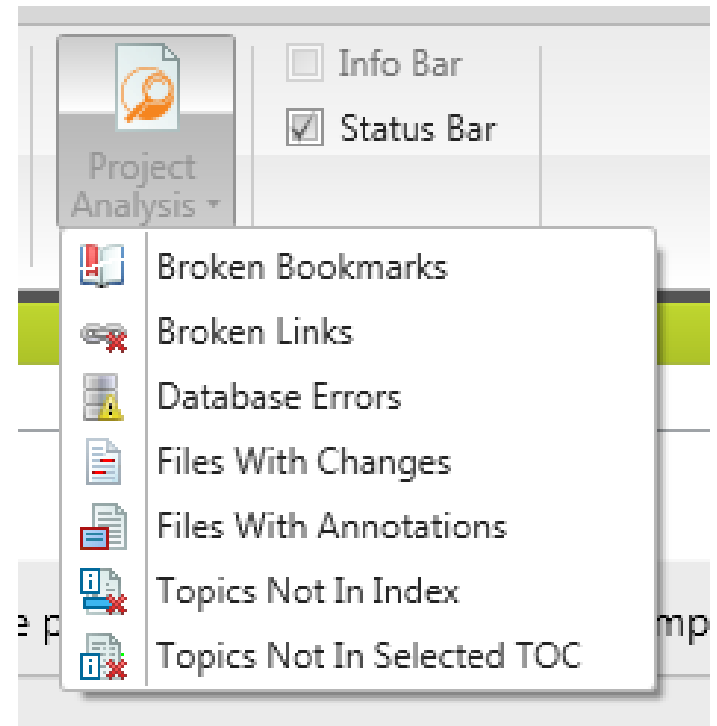
The Issue

- ◆ How *do* we track what's going on in our projects?
- ◆ The answer(s):
 - Core reporting – Project Analysis
 - More detail – File List
 - Still more detail – the Report feature
 - Still more *customizable* detail – File Tags and the Report feature
 - And “active” detail – Analyzer



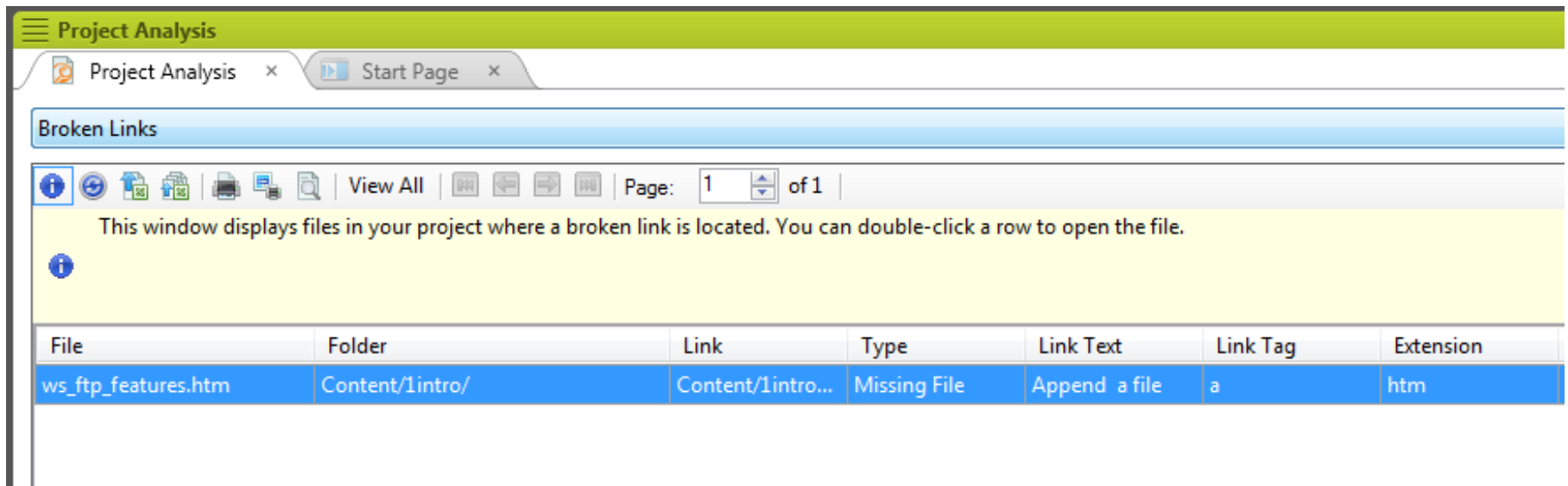
Project Analysis

- ◆ Select View > Project Analysis.
- ◆ Displays what MadCap considers to be “core” information.



Project Analysis

- ◆ Select a report to open it in the Project Analysis pane – the editing pane in v.10+, the left pane pre-v.10.

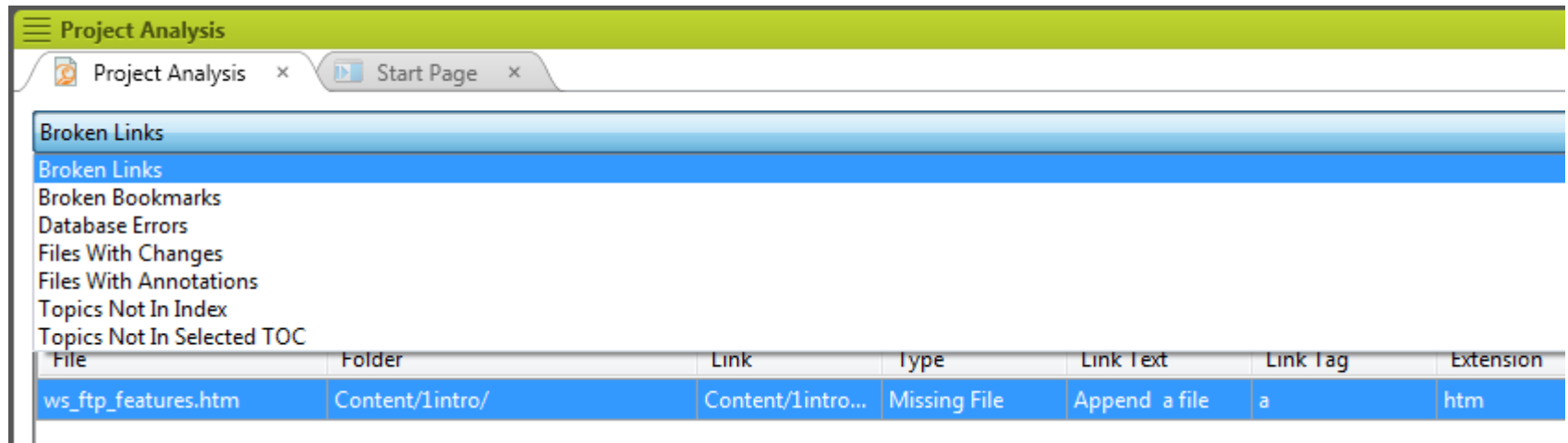


The screenshot shows the Project Analysis tool interface. At the top, there is a green header bar with the text "Project Analysis". Below this, there are two tabs: "Project Analysis" and "Start Page". The main content area is titled "Broken Links" and contains a toolbar with various icons (info, refresh, print, etc.) and a "View All" button. The page number is displayed as "Page: 1 of 1". A yellow message box states: "This window displays files in your project where a broken link is located. You can double-click a row to open the file." Below the message is a table with the following data:

| File | Folder | Link | Type | Link Text | Link Tag | Extension |
|---------------------|-----------------|-------------------|--------------|---------------|----------|-----------|
| ws_ftp_features.htm | Content/1intro/ | Content/1intro... | Missing File | Append a file | a | htm |

Project Analysis

- ◆ You can also select another report directly from the Project Analysis pane.



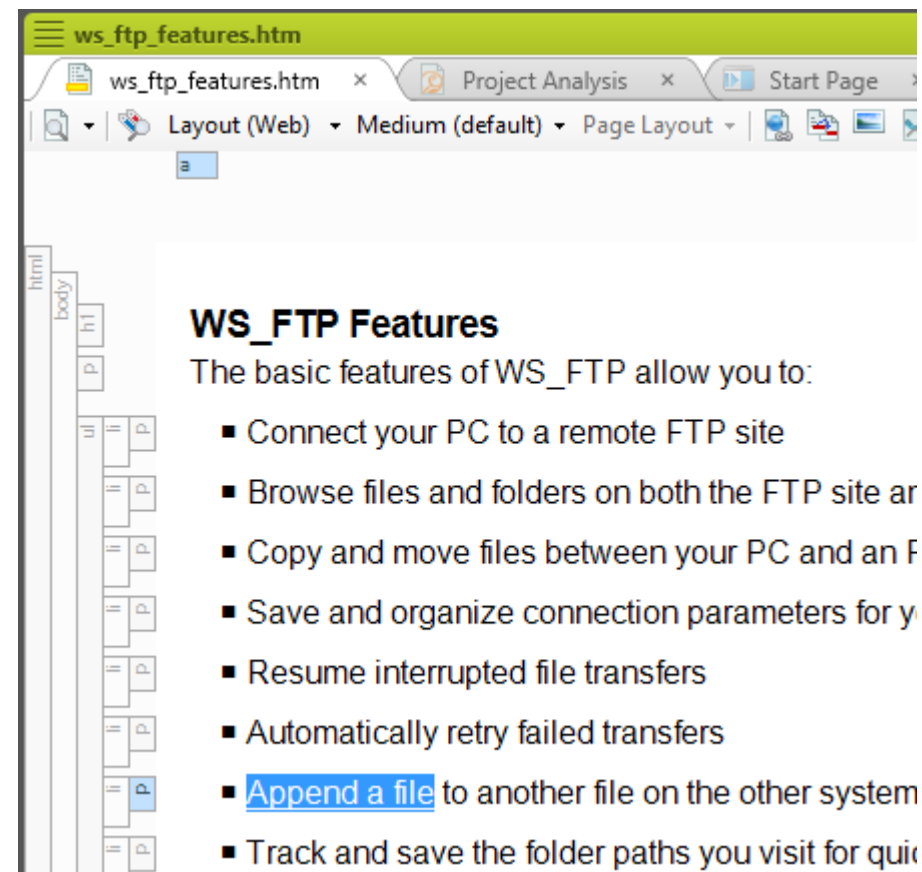
The screenshot shows the Project Analysis pane with a list of reports and a table of broken links. The reports listed are: Broken Links (selected), Broken Links, Broken Bookmarks, Database Errors, Files With Changes, Files With Annotations, Topics Not In Index, and Topics Not In Selected TOC. The table below shows the details of a broken link.

| File | Folder | Link | Type | Link Text | Link Tag | Extension |
|---------------------|-----------------|-------------------|--------------|---------------|----------|-----------|
| ws_ftp_features.htm | Content/1intro/ | Content/1intro... | Missing File | Append a file | a | htm |

- ◆ Plus:
 - Export to CSV (comma-separated value) form.
 - Print the info.
 - View different pages in a multi-page report.

Project Analysis

- ◆ Double-clicking a row opens the topic or element in question where you can make your changes.
- ◆ For example, double-clicking the broken link opens the topic and highlights the link.

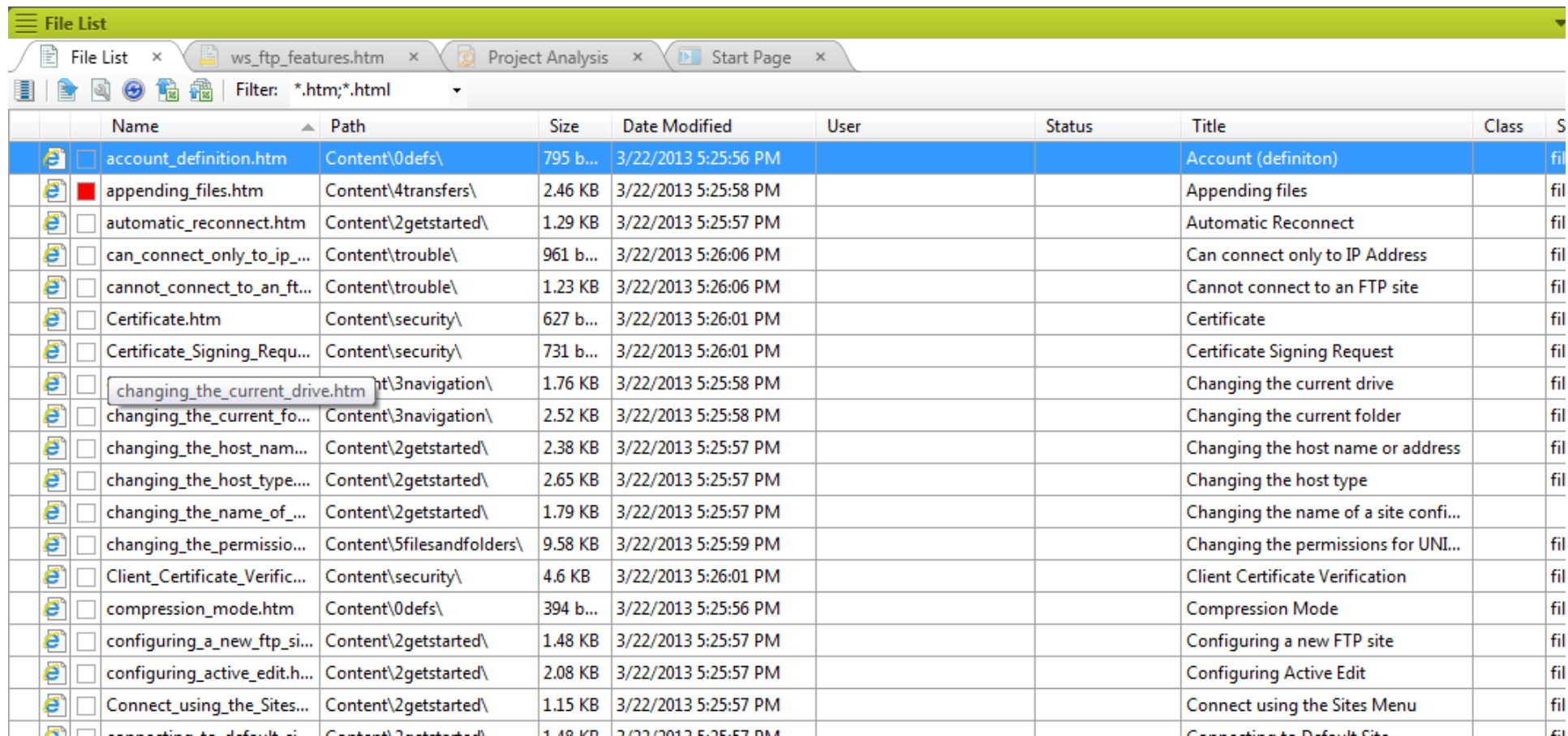


Project Analysis

◆ Demo...

File List

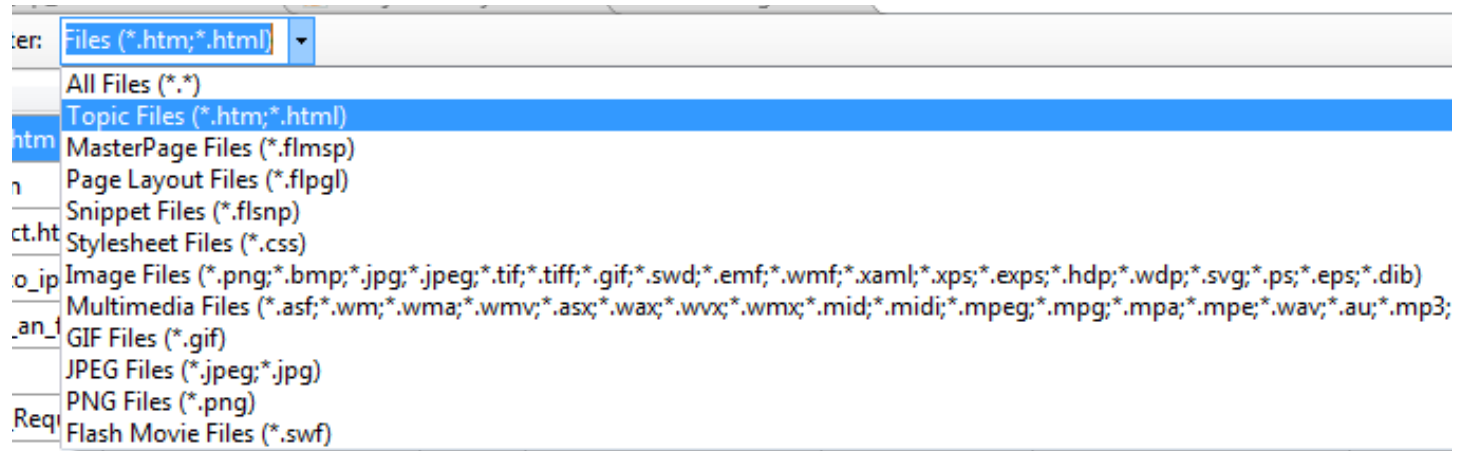
- ◆ Select View > File List – opens in the Editing pane in v.10+, the left pane pre-v.10.



| | Name | Path | Size | Date Modified | User | Status | Title | Class | S |
|--|---|---------------------------|----------|----------------------|------|--------|--------------------------------------|-------|-----|
| | <input type="checkbox"/> account_definition.htm | Content\0defs\ | 795 b... | 3/22/2013 5:25:56 PM | | | Account (definiton) | | fil |
| | <input checked="" type="checkbox"/> appending_files.htm | Content\4transfers\ | 2.46 KB | 3/22/2013 5:25:58 PM | | | Appending files | | fil |
| | <input type="checkbox"/> automatic_reconnect.htm | Content\2getstarted\ | 1.29 KB | 3/22/2013 5:25:57 PM | | | Automatic Reconnect | | fil |
| | <input type="checkbox"/> can_connect_only_to_ip_... | Content\trouble\ | 961 b... | 3/22/2013 5:26:06 PM | | | Can connect only to IP Address | | fil |
| | <input type="checkbox"/> cannot_connect_to_an_ft... | Content\trouble\ | 1.23 KB | 3/22/2013 5:26:06 PM | | | Cannot connect to an FTP site | | fil |
| | <input type="checkbox"/> Certificate.htm | Content\security\ | 627 b... | 3/22/2013 5:26:01 PM | | | Certificate | | fil |
| | <input type="checkbox"/> Certificate_Signing_Requ... | Content\security\ | 731 b... | 3/22/2013 5:26:01 PM | | | Certificate Signing Request | | fil |
| | <input type="checkbox"/> changing_the_current_drive.htm | Content\3navigation\ | 1.76 KB | 3/22/2013 5:25:58 PM | | | Changing the current drive | | fil |
| | <input type="checkbox"/> changing_the_current_fo... | Content\3navigation\ | 2.52 KB | 3/22/2013 5:25:58 PM | | | Changing the current folder | | fil |
| | <input type="checkbox"/> changing_the_host_nam... | Content\2getstarted\ | 2.38 KB | 3/22/2013 5:25:57 PM | | | Changing the host name or address | | fil |
| | <input type="checkbox"/> changing_the_host_type.... | Content\2getstarted\ | 2.65 KB | 3/22/2013 5:25:57 PM | | | Changing the host type | | fil |
| | <input type="checkbox"/> changing_the_name_of_... | Content\2getstarted\ | 1.79 KB | 3/22/2013 5:25:57 PM | | | Changing the name of a site confi... | | |
| | <input type="checkbox"/> changing_the_permissio... | Content\5filesandfolders\ | 9.58 KB | 3/22/2013 5:25:59 PM | | | Changing the permissions for UNL... | | fil |
| | <input type="checkbox"/> Client_Certificate_Verific... | Content\security\ | 4.6 KB | 3/22/2013 5:26:01 PM | | | Client Certificate Verification | | fil |
| | <input type="checkbox"/> compression_mode.htm | Content\0defs\ | 394 b... | 3/22/2013 5:25:56 PM | | | Compression Mode | | fil |
| | <input type="checkbox"/> configuring_a_new_ftp_si... | Content\2getstarted\ | 1.48 KB | 3/22/2013 5:25:57 PM | | | Configuring a new FTP site | | fil |
| | <input type="checkbox"/> configuring_active_edit.h... | Content\2getstarted\ | 2.08 KB | 3/22/2013 5:25:57 PM | | | Configuring Active Edit | | fil |
| | <input type="checkbox"/> Connect_using_the_Sites... | Content\2getstarted\ | 1.15 KB | 3/22/2013 5:25:57 PM | | | Connect using the Sites Menu | | fil |
| | <input type="checkbox"/> connecting_to_default_si... | Content\2getstarted\ | 1.48 KB | 3/22/2013 5:25:57 PM | | | Connecting to Default Site | | fil |

File List

- ◆ You can:
 - Control which columns display.
 - Export the info to CSV form.
 - Change the order of the columns.
 - Change the sort order within columns.
 - Control which file types are listed.

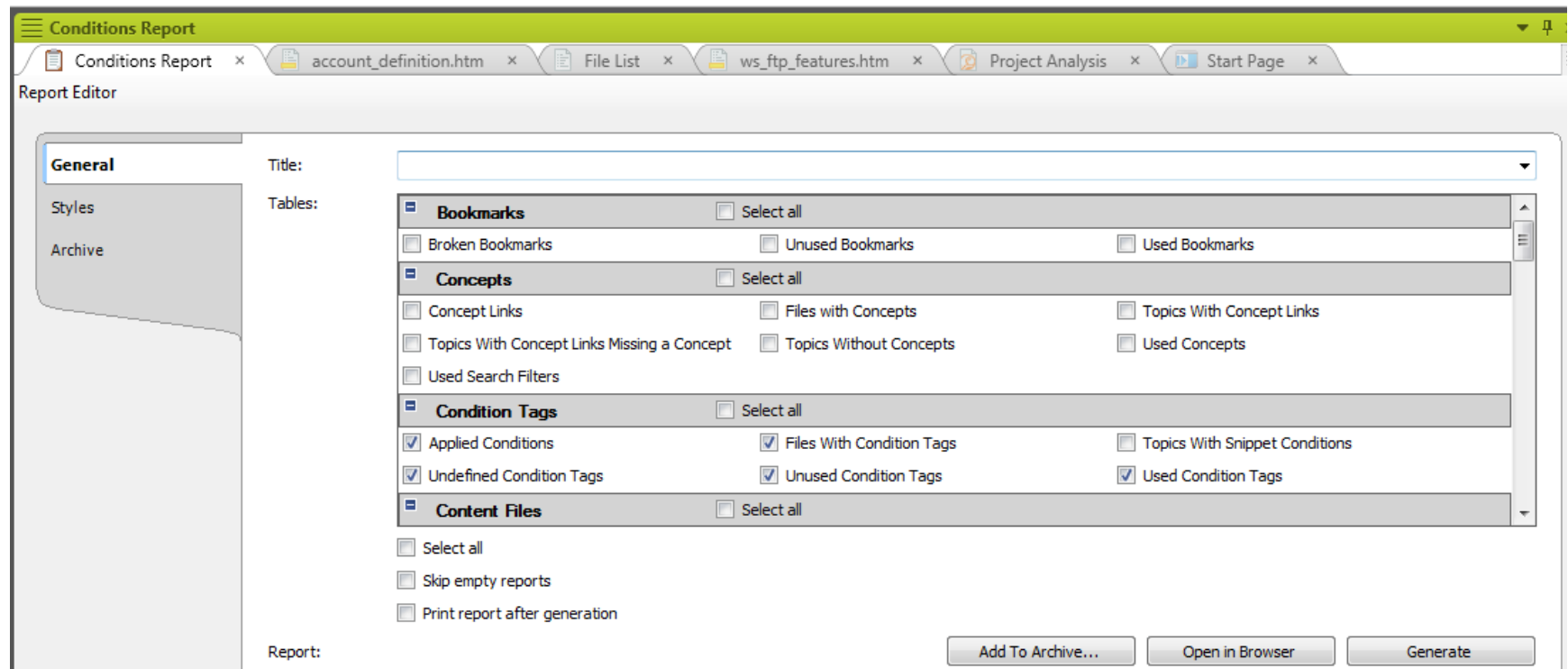


File List

- ◆ Demo...

Report Feature

- ◆ Select File > New > Add File > Reports.
- ◆ Report Editor lets you define 124 report types or combine multiple types into one.



Report Feature

- ◆ For example, all files with condition tags.

The screenshot displays the 'Conditions Report*' application interface. The browser tabs include 'Conditions Report*', 'account_definition.htm', 'File List', 'ws_ftp_features.htm', 'Project Analysis', and 'Start Page'. The 'Report Editor' is active, showing a sidebar with 'General', 'Styles', and 'Archive'. The main area is titled 'Title:' and 'Tables:'. The 'Tables' section is expanded to show 'Condition Tags' with the following options:

- Select all
- Applied Conditions
- Files With Condition Tags
- Unused Condition Tags
- Topics With Snippet Conditions
- Used Condition Tags

Other options include 'Broken Bookmarks', 'Unused Bookmarks', 'Used Bookmarks', 'Concepts', 'Concept Links', 'Files with Concepts', 'Topics With Concept Links', 'Topics With Concept Links Missing a Concept', 'Topics Without Concepts', 'Used Concepts', 'Used Search Filters', 'Content Files', 'Select all', 'Skip empty reports', and 'Print report after generation'. The 'Report:' section contains the following information:

Project: C:\Flare Training\lws_ftplws_ftp.flprj
Generated: 1/23/2015 11:33:20 AM
By: Owner

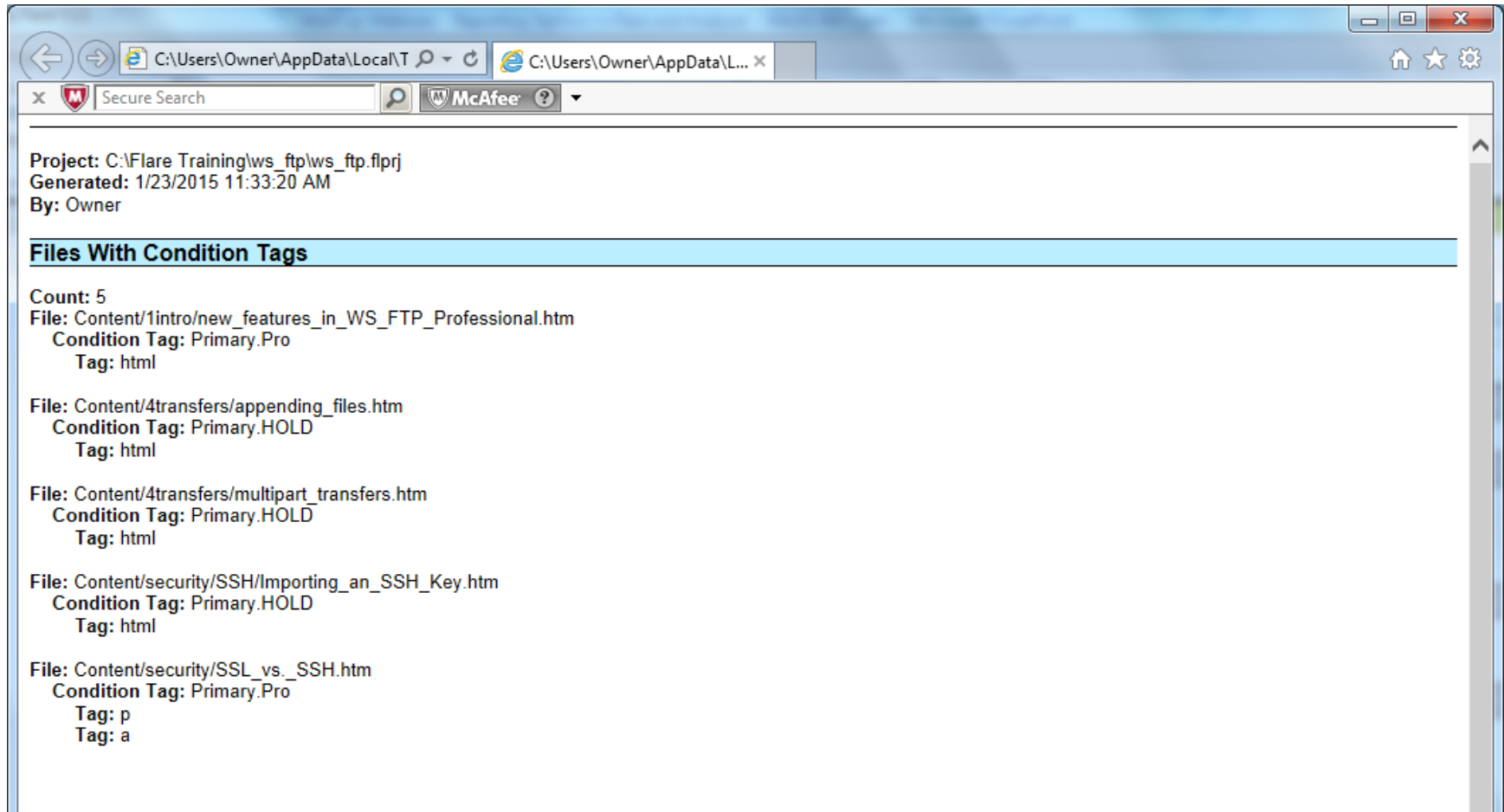
Files With Condition Tags

Count: 5
File: Content\1intro/new_features_in_WS_FTP_Professional.htm
Condition Tag: Primary.Pro

Buttons at the bottom include 'Add To Archive...', 'Open in Browser', and 'Generate'.

Report Feature

◆ Here's the full report.



Project: C:\Flare Training\ws_ftp\ws_ftp.flprj
Generated: 1/23/2015 11:33:20 AM
By: Owner

Files With Condition Tags

Count: 5

File: Content/1intro/new_features_in_WS_FTP_Professional.htm
Condition Tag: Primary.Pro
Tag: html

File: Content/4transfers/appendng_files.htm
Condition Tag: Primary.HOLD
Tag: html

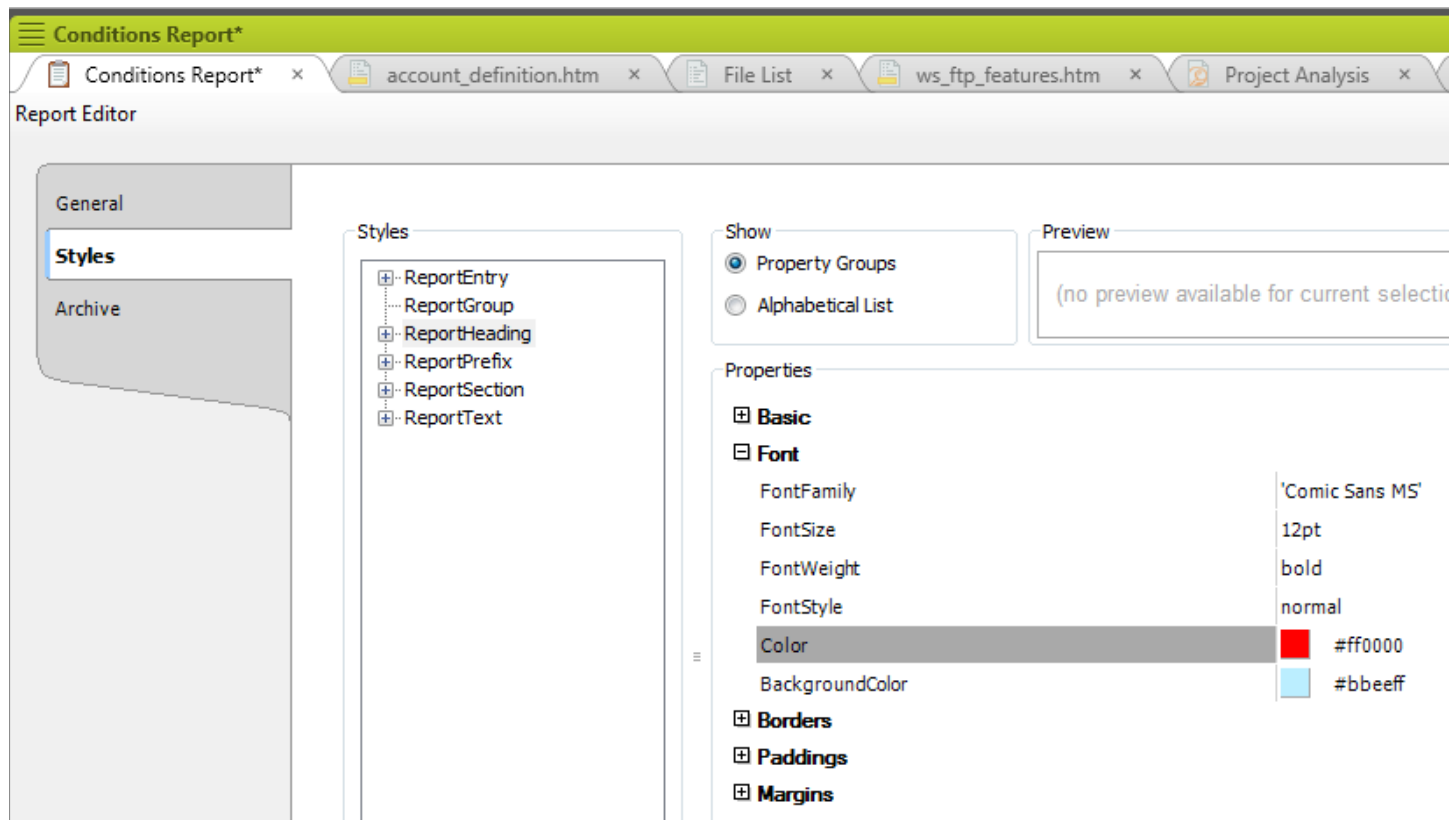
File: Content/4transfers/multipart_transfers.htm
Condition Tag: Primary.HOLD
Tag: html

File: Content/security/SSH/Importing_an_SSH_Key.htm
Condition Tag: Primary.HOLD
Tag: html

File: Content/security/SSL_vs._SSH.htm
Condition Tag: Primary.Pro
Tag: p
Tag: a

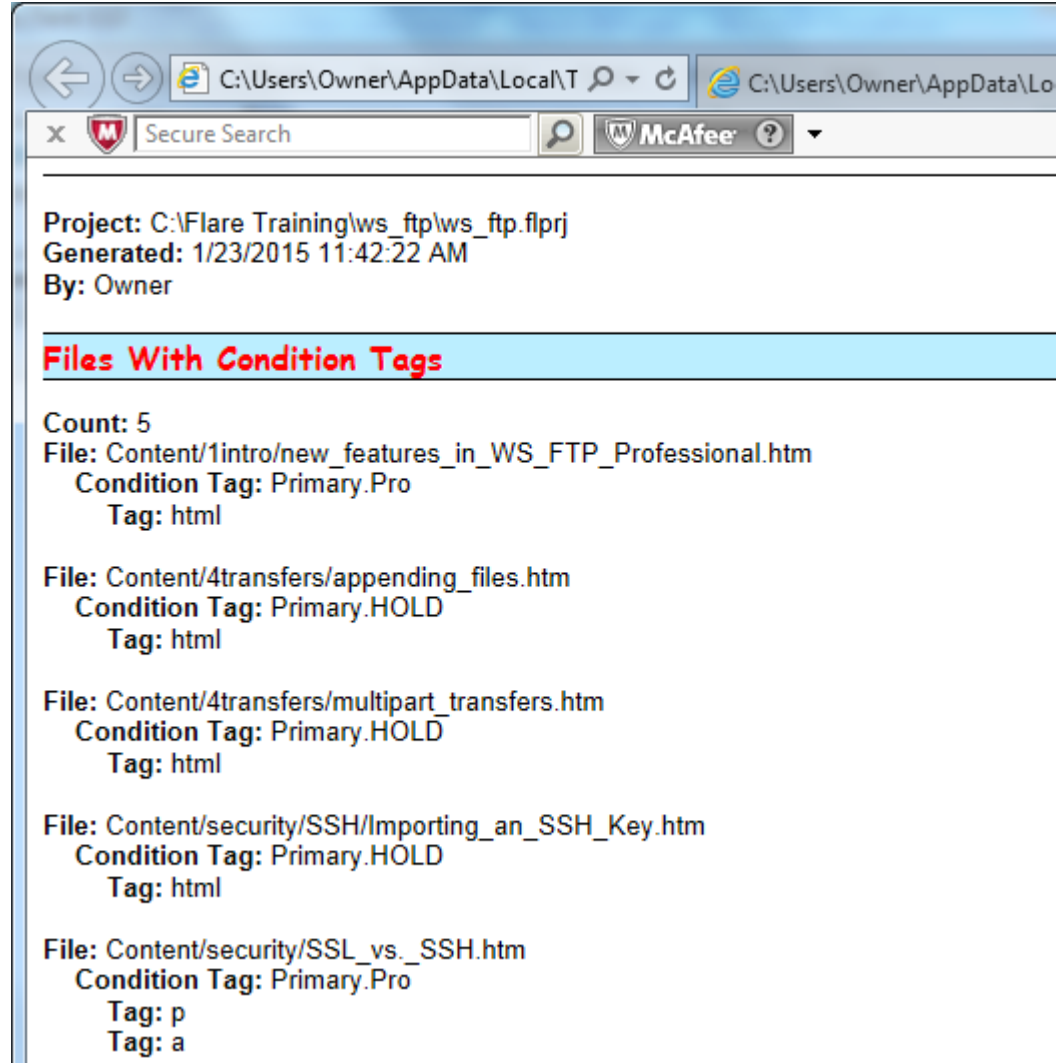
Report Feature

- ◆ Can also use Styles options to format a report.
- ◆ For example, and with apologies, these settings on the Styles tab:



Report Feature

◆ Produce this:



The screenshot shows a web browser window with the following content:

Project: C:\Flare Training\ws_ftp\ws_ftp.flprj
Generated: 1/23/2015 11:42:22 AM
By: Owner

Files With Condition Tags

Count: 5

File: Content/1intro/new_features_in_WS_FTP_Professional.htm
Condition Tag: Primary.Pro
Tag: html

File: Content/4transfers/appendng_files.htm
Condition Tag: Primary.HOLD
Tag: html

File: Content/4transfers/multipart_transfers.htm
Condition Tag: Primary.HOLD
Tag: html

File: Content/security/SSH/Importing_an_SSH_Key.htm
Condition Tag: Primary.HOLD
Tag: html

File: Content/security/SSL_vs._SSH.htm
Condition Tag: Primary.Pro
Tag: p
Tag: a

Report Feature

- ◆ Demo...

File Tags and the Report Feature

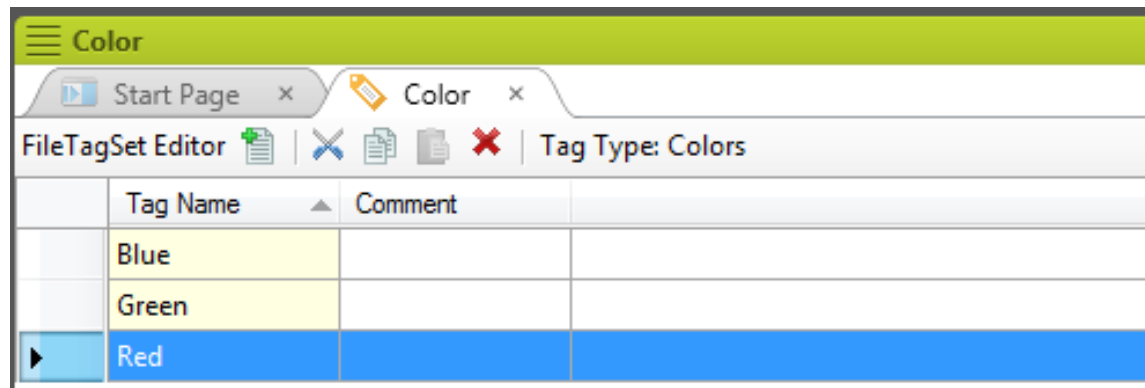
- ◆ Problem – the Report feature’s categories are pre-defined.
- ◆ Can you create your own custom reports?
- ◆ Yes, using file tags – “markers” that you create and apply to topics and other types of files.
- ◆ You can then generate a report that lists all files containing a particular set of tags.

File Tags and the Report Feature

- ◆ To create file tags.
 - Select File > New > File Tag Set (or open a File Tag Set in the Advanced folder on the Project Organizer).
 - Use one of the preset templates (MyAuthors... or MyStatus...) or select MyFileTagSet to define your own template.

File Tags and the Report Feature

- ◆ Add or modify the tags as necessary.
 - Here's a file tag set called Color with three tags.



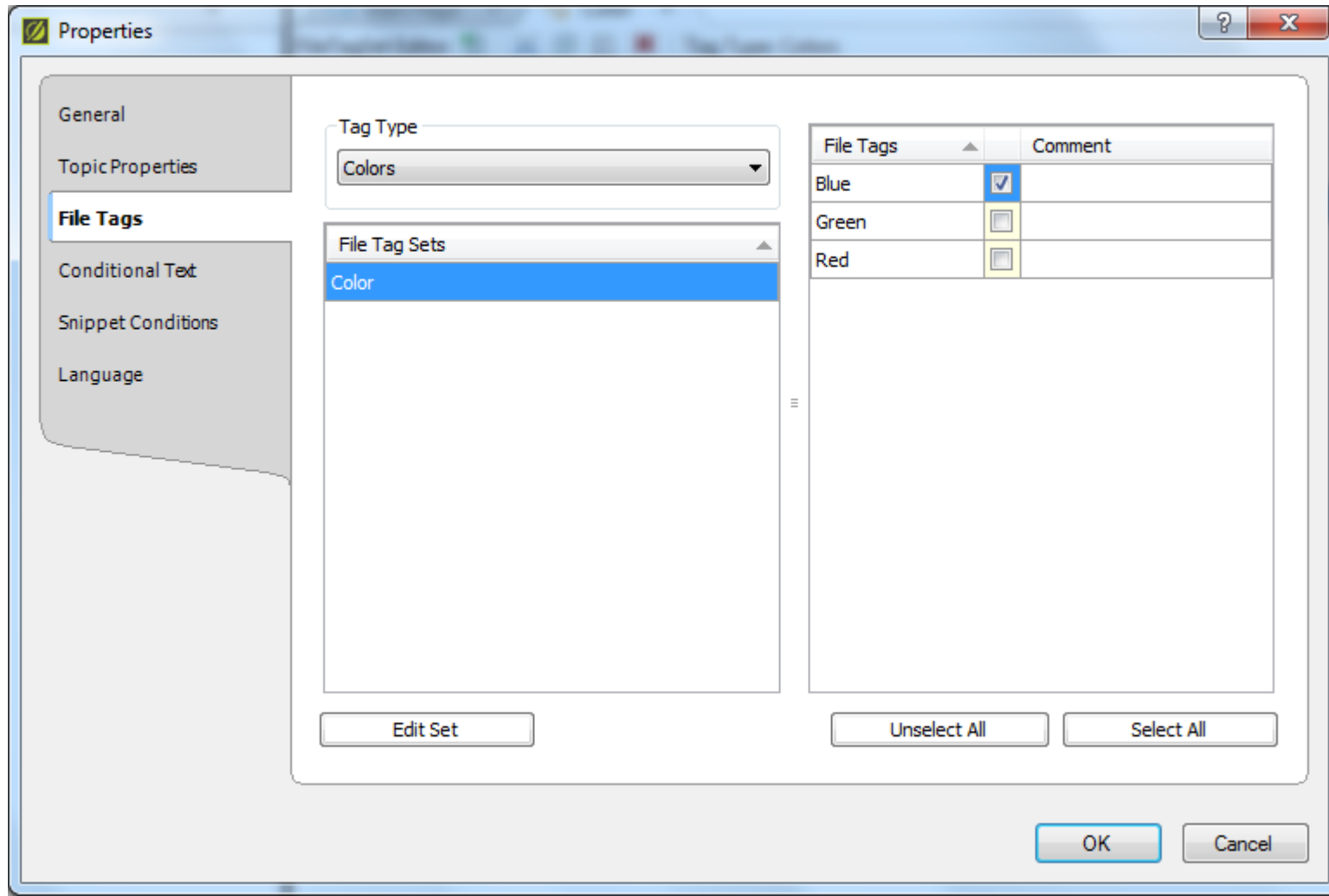
The screenshot shows the 'FileTagSet Editor' interface. At the top, there is a green header bar with a hamburger menu icon and the text 'Color'. Below this is a browser-like tab bar with two tabs: 'Start Page' and 'Color'. The main area is titled 'FileTagSet Editor' and contains a table with two columns: 'Tag Name' and 'Comment'. The table has three rows: 'Blue', 'Green', and 'Red'. The 'Red' row is selected, indicated by a blue background. The 'Tag Type' is 'Colors'.

| | Tag Name | Comment |
|---|----------|---------|
| | Blue | |
| | Green | |
| ▶ | Red | |

File Tags and the Report Feature

- ◆ To apply file tags:
 - Open the Properties pane for a topic or file, select the File Tags tab, select the tag type, and select the desired tag – as shown in the next screen.

File Tags and the Report Feature



File Tags and the Report Feature

- ◆ And when you run the report, by selecting File Tags > File With Tag: Colors, you get this (if you had applied just the Blue tag to one file):

Project: C:\Templenovo\Karry3\Karry3.flprj
Generated: 2/14/2015 11:48:21 AM
By: Owner

Files With Tags: Colors

Colors: Color.Blue
Count: 1
File: Content/Topic.htm

Colors: Color.Green
(No files)

Colors: Color.Red
(No files)

File Tags and the Report Feature

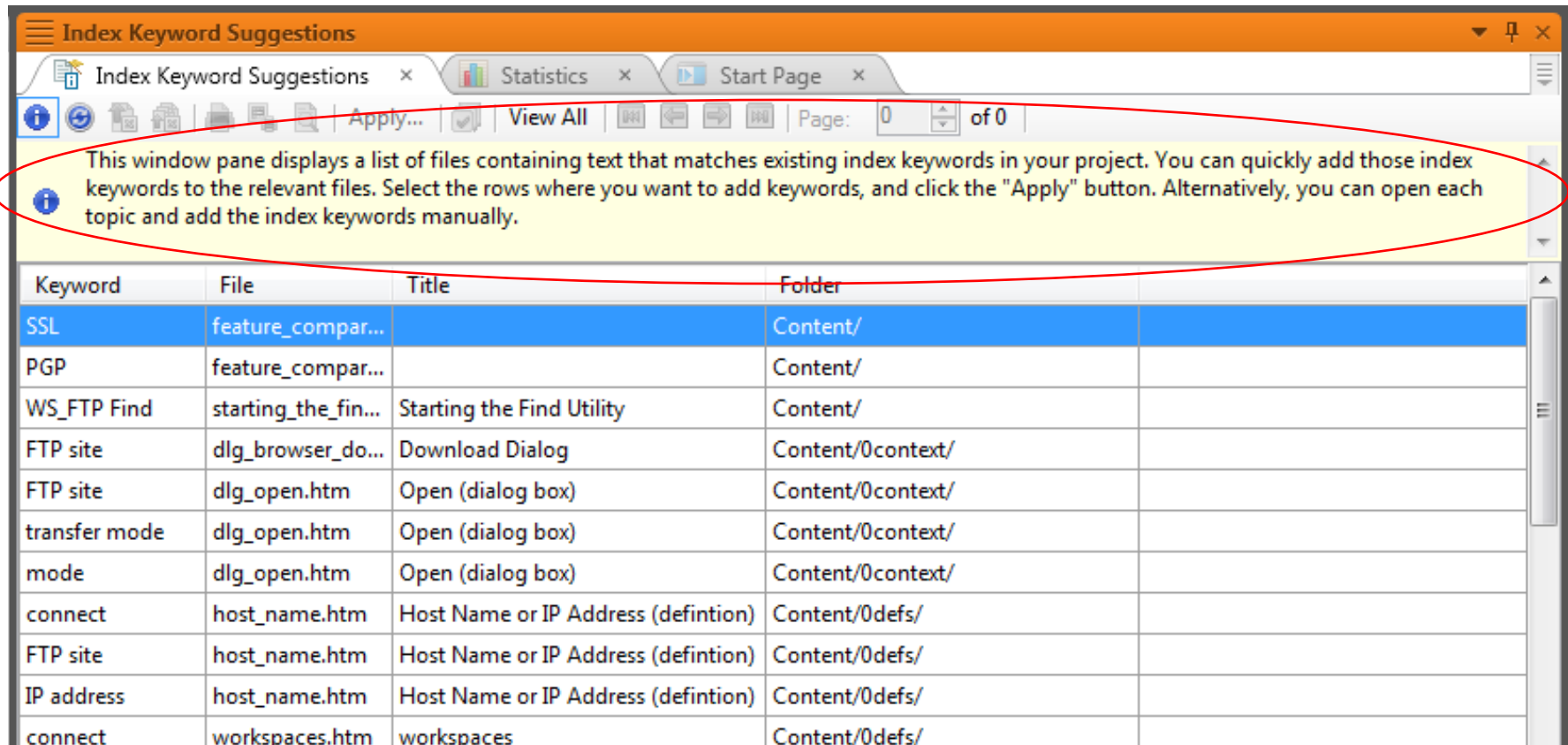
- ◆ Demo...

Analyzer

- ◆ An add-on to Flare.
- ◆ Reports are similar to those from Flare's Report feature but...
- ◆ Flare's reports are *static* – they list changes or properties but leave implementation up to you.
- ◆ Analyzer's reports are *active* – they list changes or properties *and* can help you implement them or implement them for you.

Analyzer

- ◆ For example, the Index Keyword Suggestions report.



This window pane displays a list of files containing text that matches existing index keywords in your project. You can quickly add those index keywords to the relevant files. Select the rows where you want to add keywords, and click the "Apply" button. Alternatively, you can open each topic and add the index keywords manually.

| Keyword | File | Title | Folder |
|---------------|---------------------|-------------------------------------|-------------------|
| SSL | feature_compar... | | Content/ |
| PGP | feature_compar... | | Content/ |
| WS_FTP Find | starting_the_fin... | Starting the Find Utility | Content/ |
| FTP site | dlg_browser_do... | Download Dialog | Content/0context/ |
| FTP site | dlg_open.htm | Open (dialog box) | Content/0context/ |
| transfer mode | dlg_open.htm | Open (dialog box) | Content/0context/ |
| mode | dlg_open.htm | Open (dialog box) | Content/0context/ |
| connect | host_name.htm | Host Name or IP Address (defintion) | Content/0defs/ |
| FTP site | host_name.htm | Host Name or IP Address (defintion) | Content/0defs/ |
| IP address | host_name.htm | Host Name or IP Address (defintion) | Content/0defs/ |
| connect | workspaces.htm | workspaces | Content/0defs/ |

Analyzer

- ◆ Or the Variable Suggestions report, which scans for content that matches existing variables.

Variable Suggestions

Variable Suggestions x Index Keyword Suggestions x Statistics x Start Page x

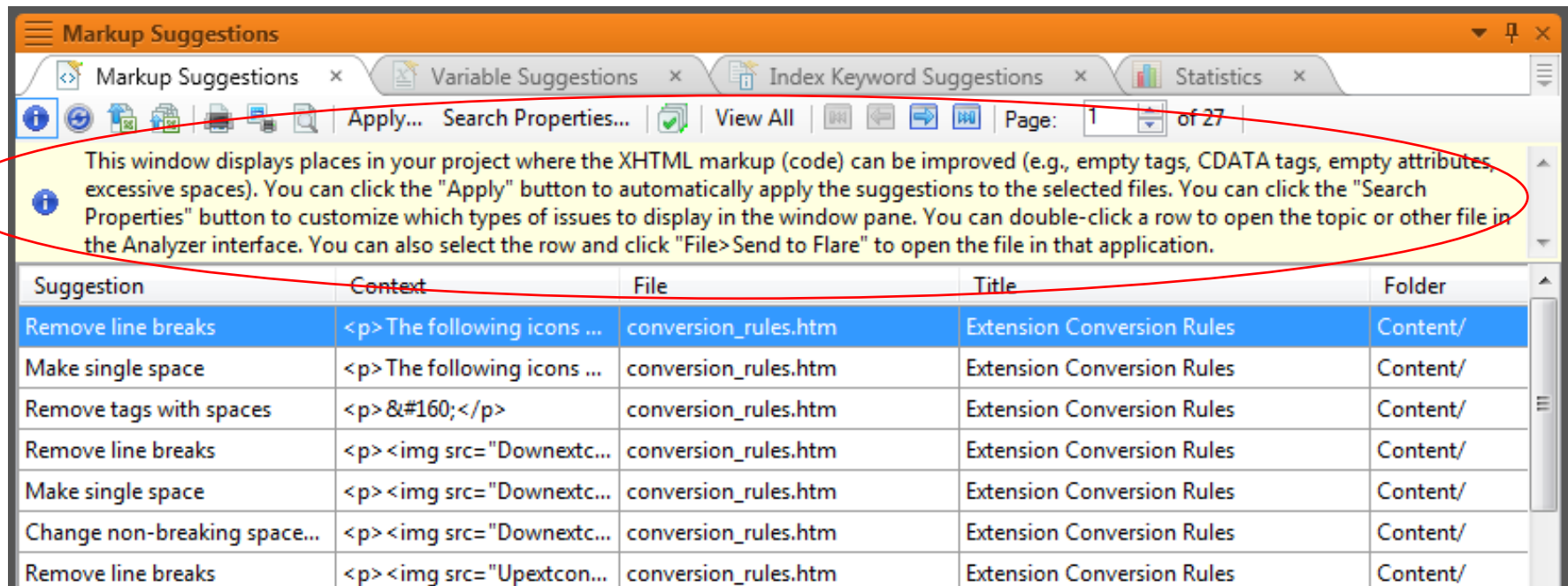
Apply... View All Page: 1 of 1

This window displays content that matches existing variables in your project. You can quickly convert these occurrences to variables. Select the rows you want to convert, and click the "Apply" button.

| Suggestion | Type | Context | File | Folder |
|-----------------------|------------------|-------------------------------|----------------------|-----------------|
| Replace with Variable | Primary.Register | <V>Press the Enter key.</...> | download_patches.htm | Content/1intro/ |

Analyzer

- ◆ Or the Markup Suggestions report, which looks for inefficient code and suggests fixes.



This window displays places in your project where the XHTML markup (code) can be improved (e.g., empty tags, CDATA tags, empty attributes, excessive spaces). You can click the "Apply" button to automatically apply the suggestions to the selected files. You can click the "Search Properties" button to customize which types of issues to display in the window pane. You can double-click a row to open the topic or other file in the Analyzer interface. You can also select the row and click "File>Send to Flare" to open the file in that application.

| Suggestion | Context | File | Title | Folder |
|------------------------------|-----------------------------|----------------------|----------------------------|----------|
| Remove line breaks | <p> The following icons ... | conversion_rules.htm | Extension Conversion Rules | Content/ |
| Make single space | <p> The following icons ... | conversion_rules.htm | Extension Conversion Rules | Content/ |
| Remove tags with spaces | <p> </p> | conversion_rules.htm | Extension Conversion Rules | Content/ |
| Remove line breaks | <p> <img src="Downnextc... | conversion_rules.htm | Extension Conversion Rules | Content/ |
| Remove line breaks | <p> <img src="Upextcon... | conversion_rules.htm | Extension Conversion Rules | Content/ |

Analyzer

- ◆ Demo...

So Which One Should I Use?

- ◆ Depends whether you need:
 - A quick look at core issues – Project Analysis pane.
 - A dynamic look at the project's files – File List.
 - An informational report to be printed for use at or away from the project – Report feature.
 - An informational report that can be customized for your needs – Report feature with file tags.
 - Dynamic reports that can help you make the changes – Analyzer reports.

Hyper/Word Services Offers...

Training • Consulting • Development

- Flare • Advanced Flare (thru MadCap)
- ViziApps
- Single sourcing • Structured authoring



THANK YOU FOR ATTENDING TODAY'S
WEBINAR!
As a webinar attendee, receive **\$100 OFF** our next
advanced training course. Just \$499 per student!

MadCap Flare CSS Training
May 27-28, 2015 (web-based)
MadCap Flare Single Sourcing Training
June 25-26, 2015 (web-based)

**Offer valid through April 30, 2015.*

Note: Courses subject to change. Availability based on student registration. Contact us for the latest schedule and course availability.

TO RECEIVE YOUR DISCOUNT, CONTACT:
sales@madcapsoftware.com | +1 858.320.0387 opt.1

Thank you... Questions?



978-657-5464

nperlin@nperlin.cnc.net

www.hyperword.com

Twitter: NeilEric

