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.
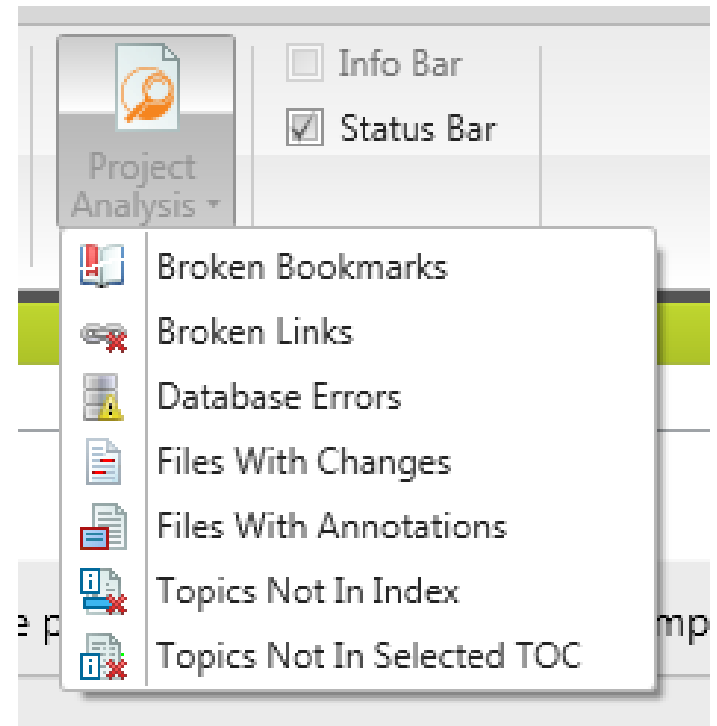
The Issue

- ◆ 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
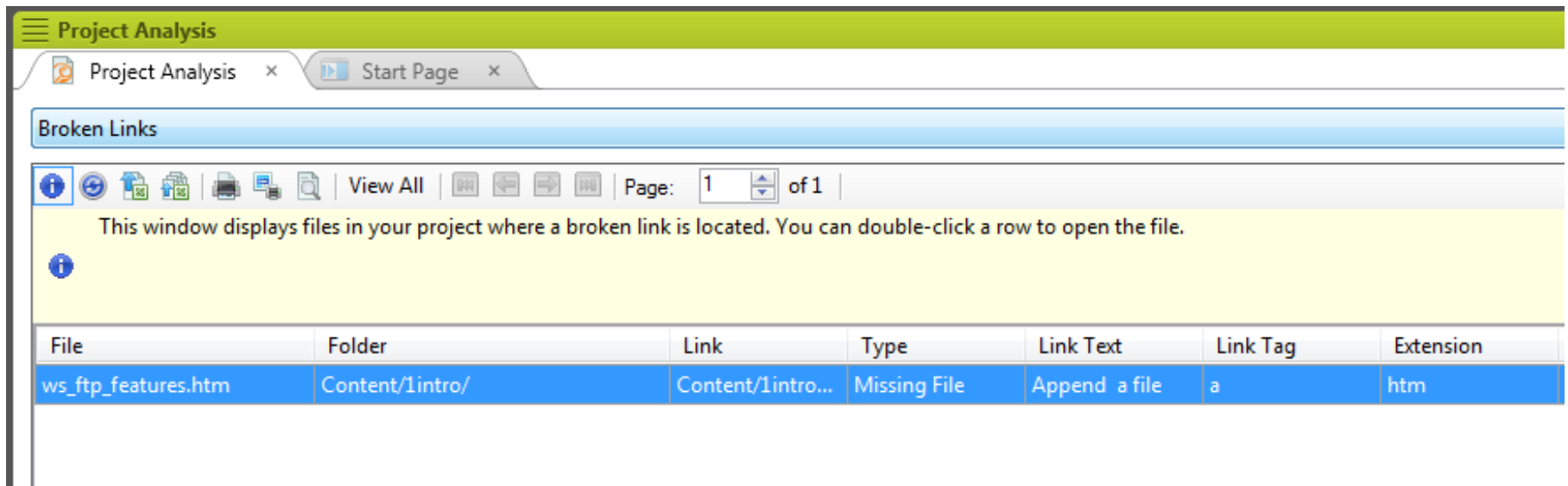   - And "active" detail – Analyzer

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.

Project Analysis

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

◆ 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.

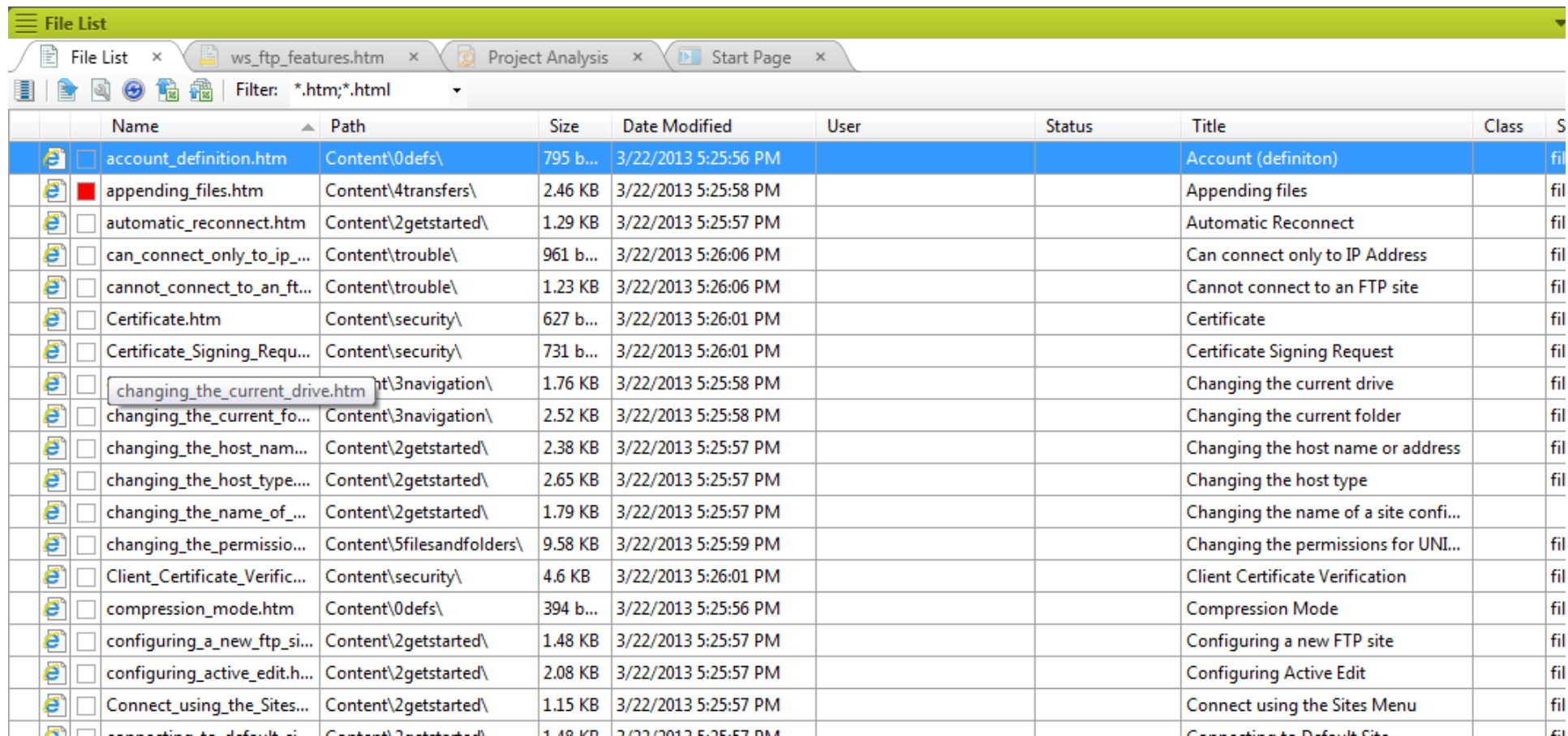◆ For example, double-clicking the broken link opens the topic and highlights the link.
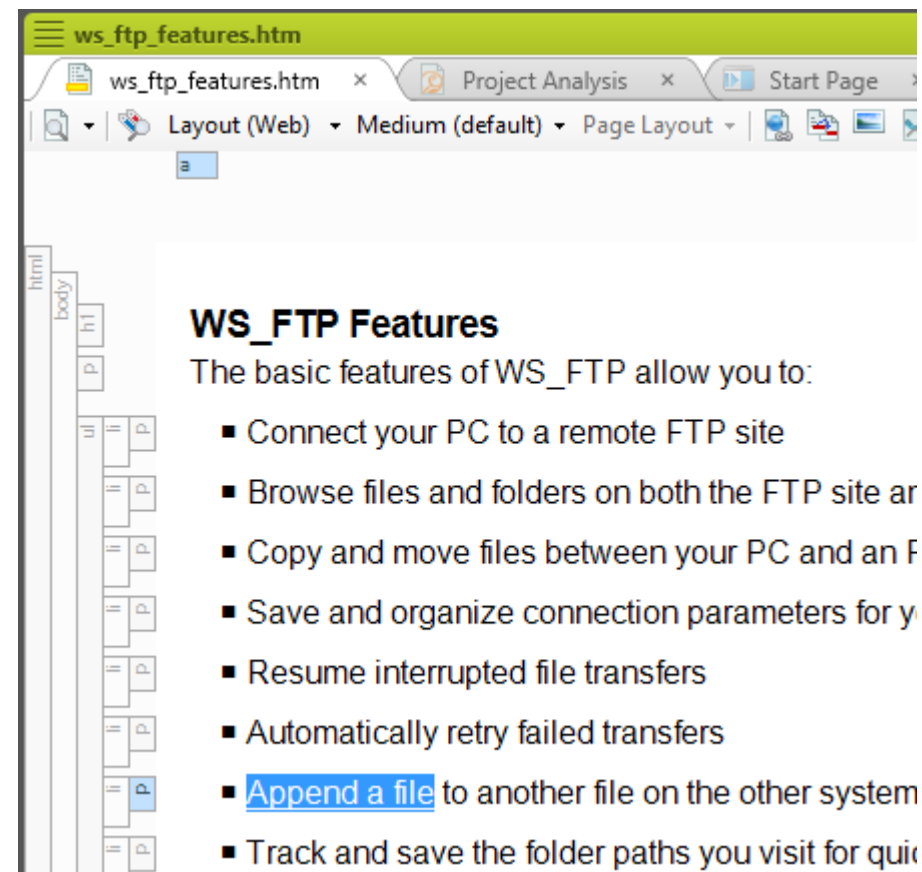
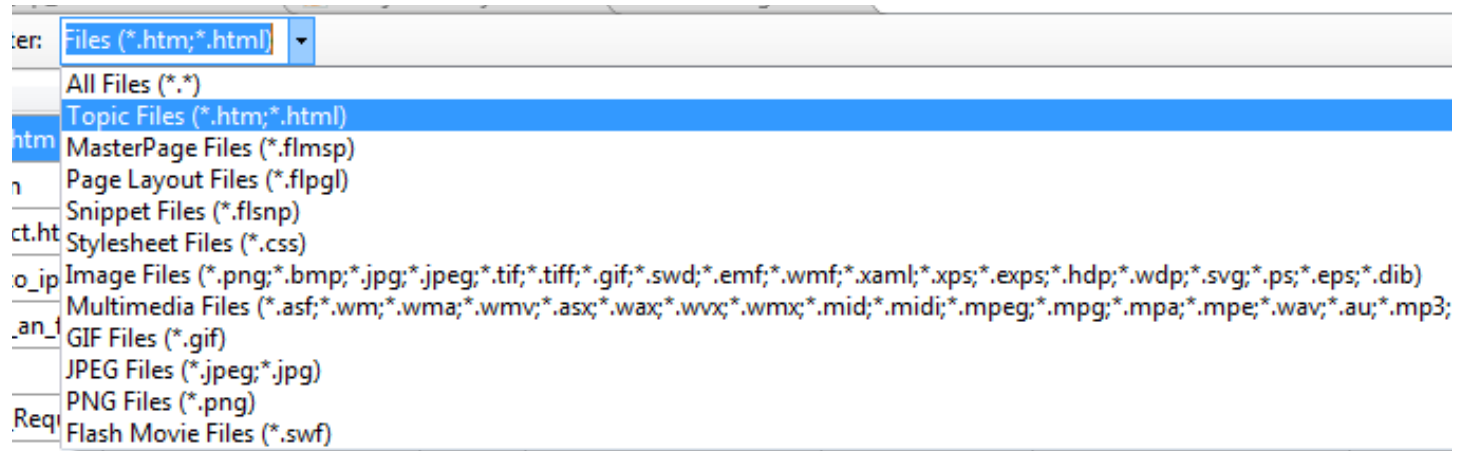# Project Analysis

- ◆ Demo…

File List

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

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.
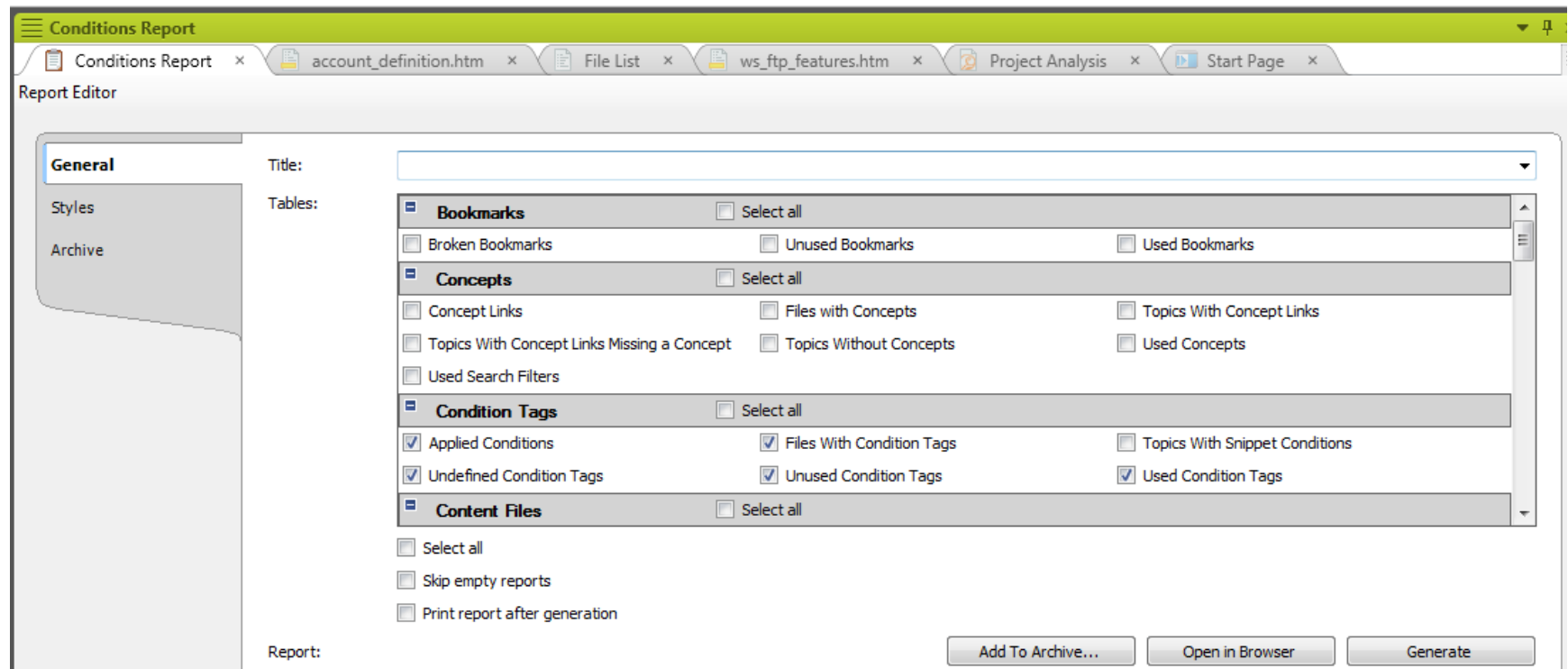
Report Feature

◆ For example, all files with condition tags.

Report Feature

◆ Here's the full report.
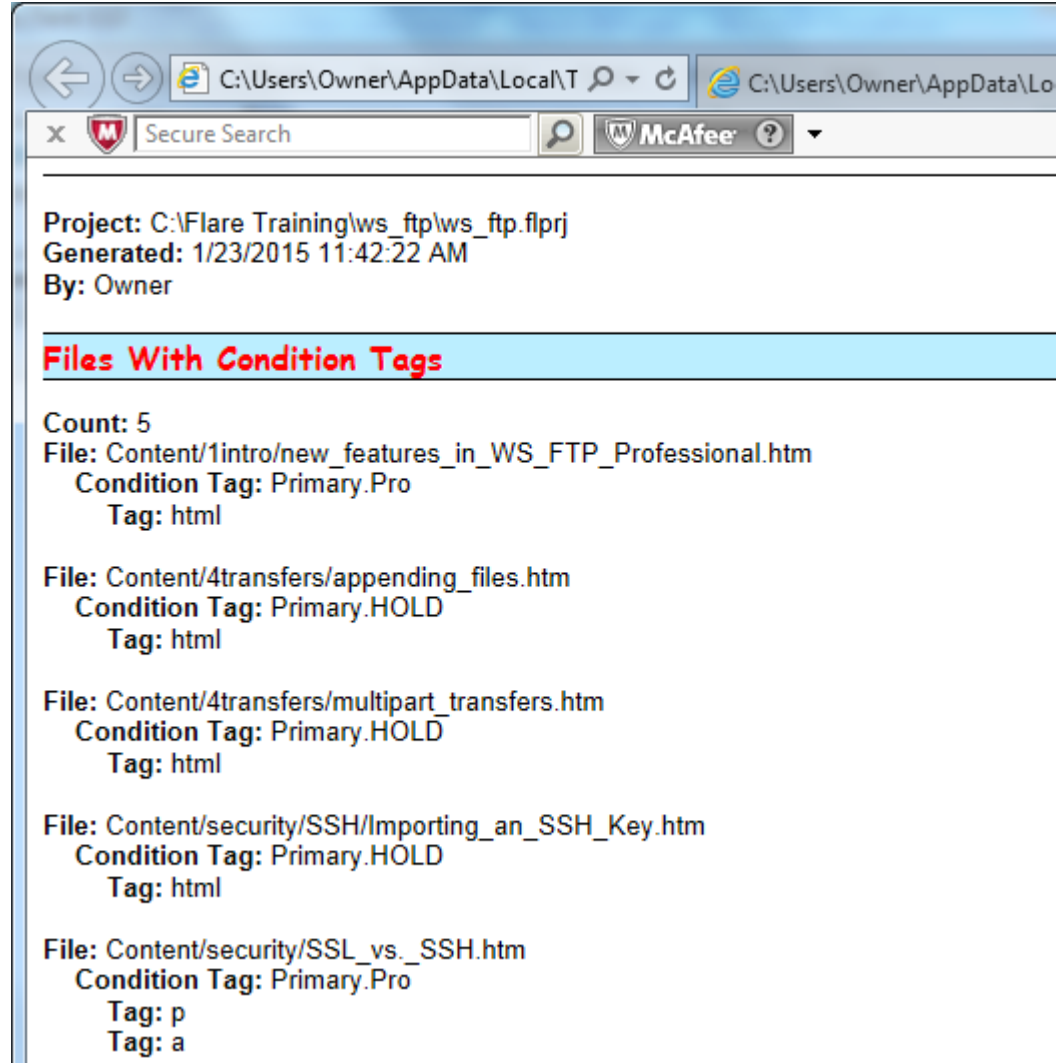
Report Feature

◆ Can also use Styles options to format a report.

◆ For example, and with apologies, these settings on the Styles tab:
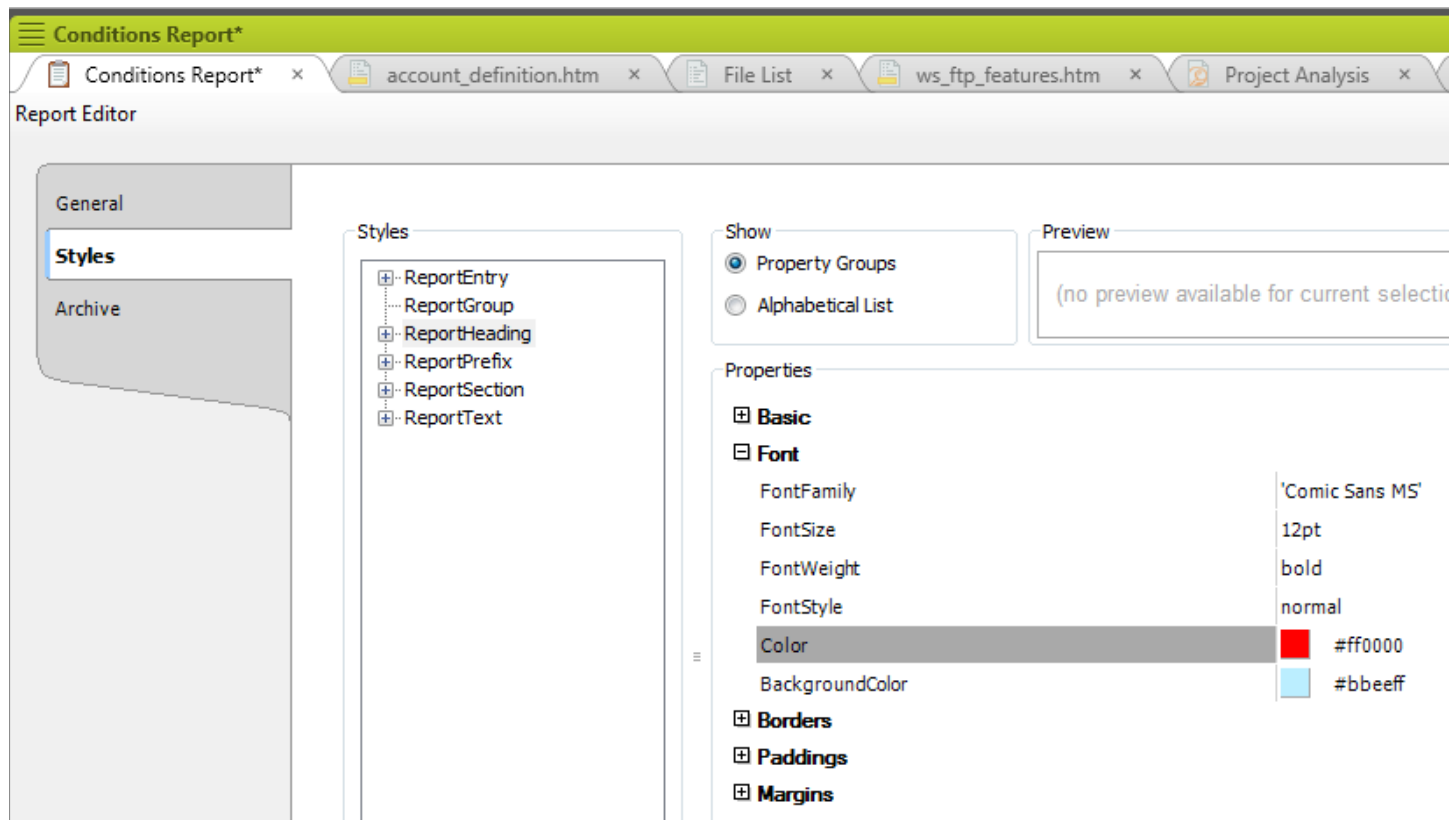
Report Feature

◆ Produce this:

Report Feature

◆ Demo…

File Tags and the Report Feature
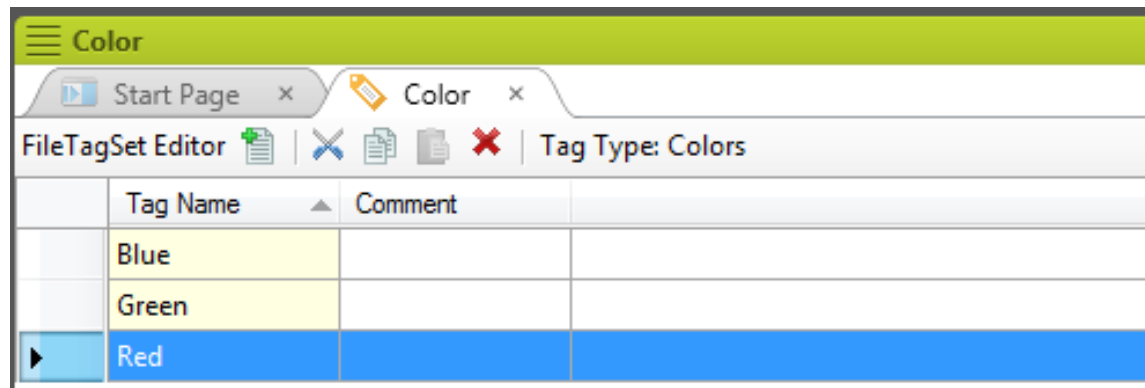
◆ Problem – the Report feature's categories are pre-defined.

◆ 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.

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

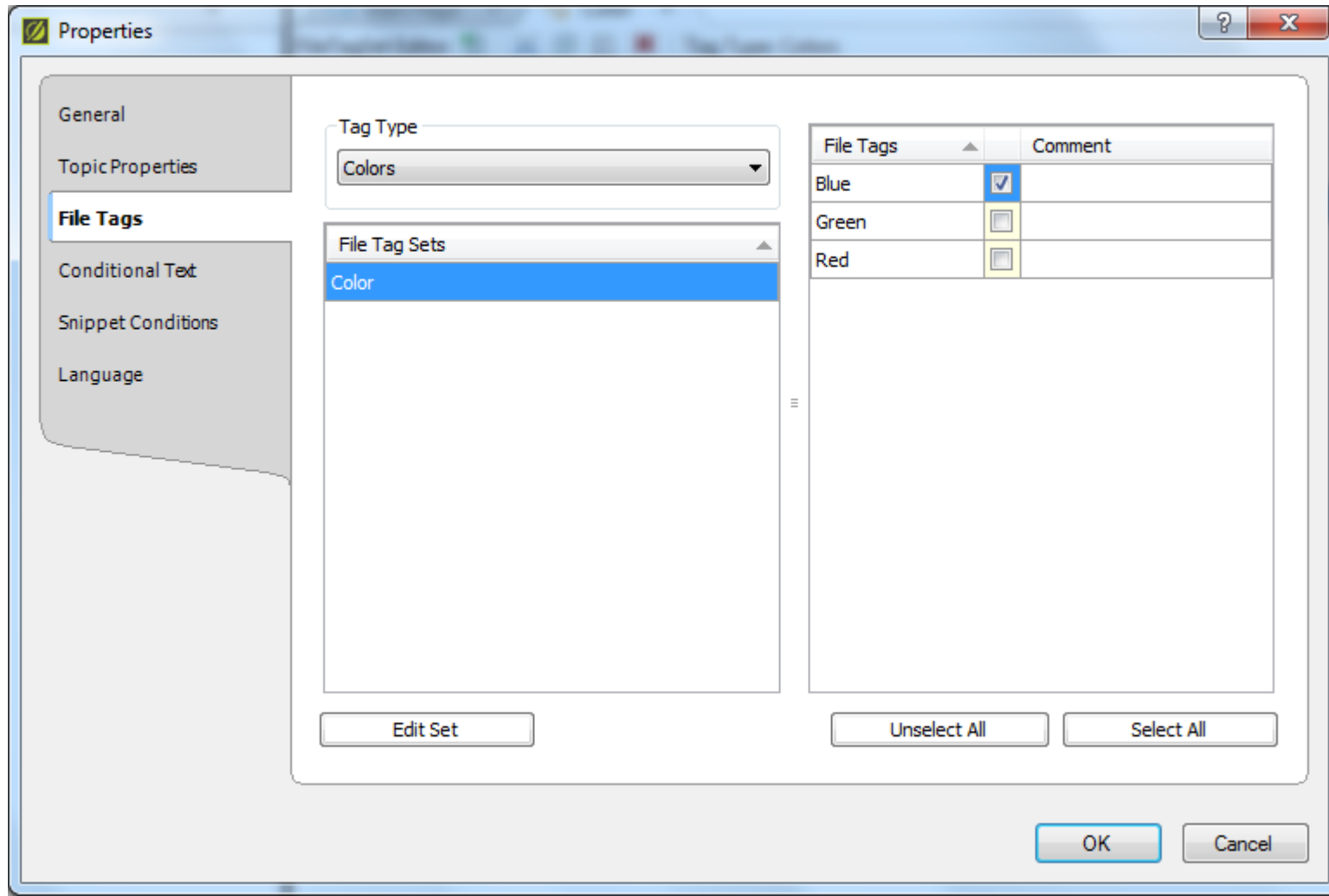◆ And when you run the report, by selecting File Tags > File With Tag: Colors, you get this (if you had applied just the Blue tag to one file):

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
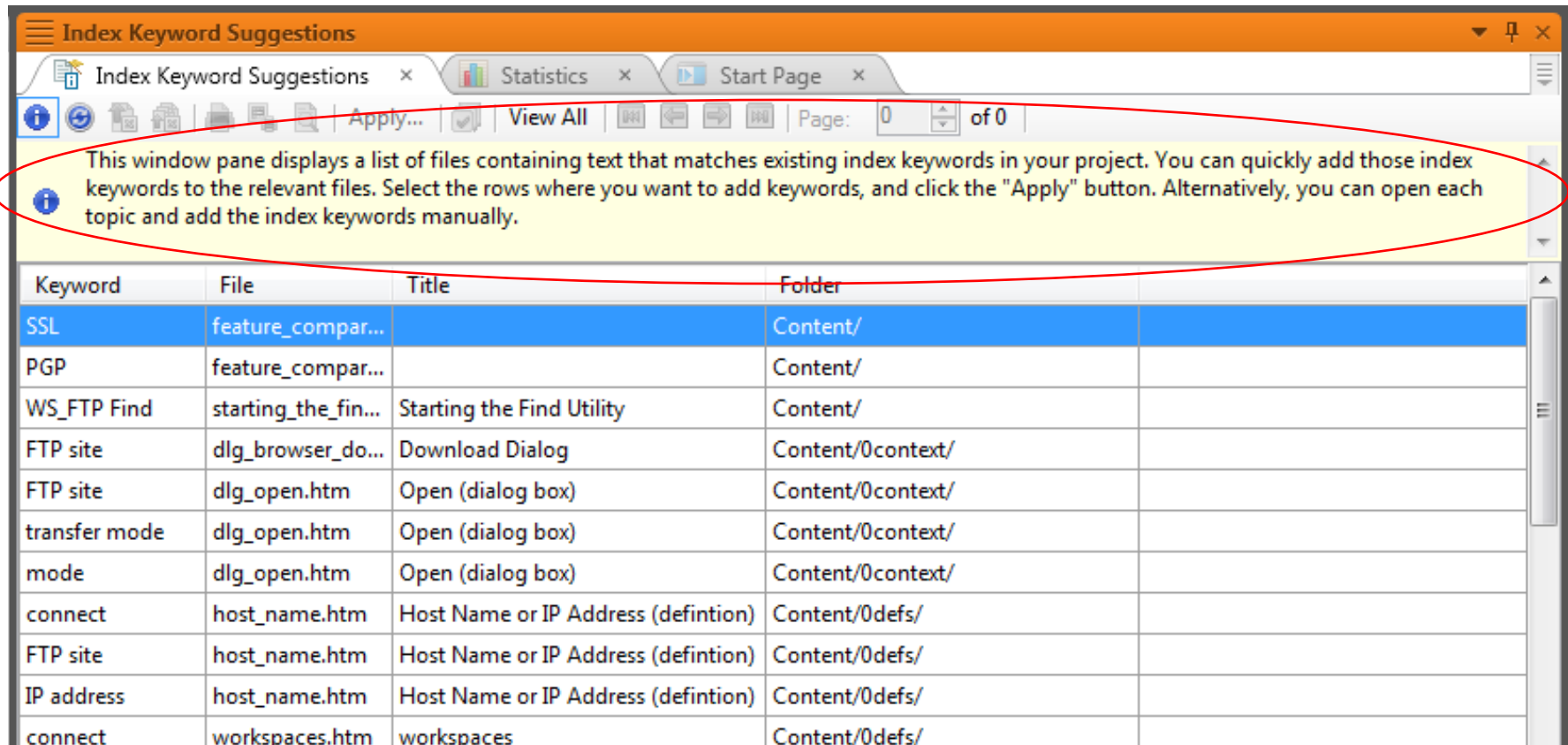
- ◆ Demo…

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.

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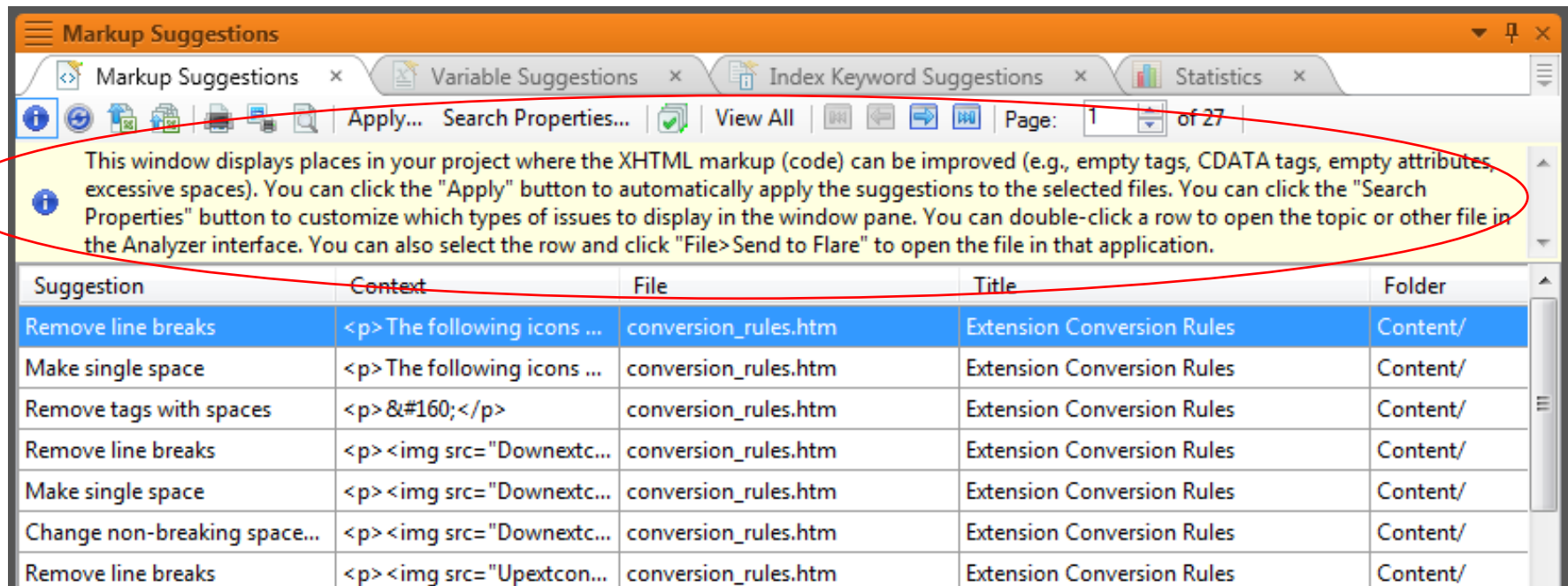
◆ Or the Variable Suggestions report, which scans for content that matches existing variables.

Analyzer

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

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.

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➢ ViziApps

➢ Single sourcing • Structured authoring

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Thank you... Questions?

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