Reviewing Adobe RoboHelp version 9

Understanding effective page layout

Working with MadCap Flare version 7

Learning to use more pictures

Streamlining your workflow with Flare 7

Eddie VanArsdall explains how the latest version of MadCap Flare supports the complete information development cycle.

Since its introduction in early 2006, MadCap Flare™ has maintained a steady course of evolution. Flare users have helped foster this evolution through proactive feedback.

MadCap obviously listens. Each new version of Flare has shown that the organisation understands its users, and Flare 7 is no exception. Packed with impressive new features and enhancements, Flare 7 provides full support for information development teams and their workflows.

Setting up your infrastructure
A typical information development project requires setting up an infrastructure for organising, managing and sharing project files. Flare 7 provides three new features that support resource sharing and team collaboration.

External Resources pane
While Flare 7 continues to support one-way linking to source files, the new **External Resources** pane dramatically extends file linking capability. You can connect to local and network folders outside of your project and create mappings to files in those folders. As long as you maintain the connections, you can then access the files and folders from any project.

You can also establish *bi-directional synchronization* between a file in your project and an external file. This is useful if you are the 'keeper' of a specific master file and need to ensure that everyone has the latest version.

Figure 1. Synchronize Files window

The **External Resources** pane also launches a **Synchronize Files** window, where you can synchronise, import and export files. You can also manage file mappings (Figure 1).

SharePoint Explorer pane
If your team uses Microsoft SharePoint for file management and source control, you can integrate Flare 7 into your SharePoint workflow. The new **SharePoint Explorer** enables you to connect to a SharePoint server and use check-in and check-out commands to work on topics. As an alternative, you can copy a file to your project and use the same bi-directional mappings supported by the **External Resources** pane.

Subversion integration
Apache Subversion (SVN) is a popular, open-source solution for managing file libraries. Flare 7 has native support for Subversion. You can bind a new project to Subversion during creation, or you can bind an existing project using the **Project Properties** window. No third-party plug-ins are required.

Developing your content
With your infrastructure in place, you're ready to concentrate on writing. The Flare 7 XHTML Editor provides a streamlined authoring environment with several useful new features.

Editing toolbar enhancements
The editing toolbar has two new, notable additions:
- **Preview button:** This button has been enhanced to display a drop-down list of all output types (called *targets*) in your project. You can easily preview the current topic as HTML or PDF without changing the primary target.
- **Insert Snippet and Insert Variable buttons:** These two buttons enable you to quickly insert snippets and variables (reusable text blocks and text strings). This facilitates faster editing than using the equivalent menu commands.

Auto Suggestion
Flare 7 replaces the former IntelliSense feature with an optional but much smarter feature called *Auto Suggestion*. This new feature analyses what you type and offers suggestions for completion. Those suggestions come from system variables such as *Long Date*, as well as from your custom variables and snippets. Suggestions appear in a pop-up window, and
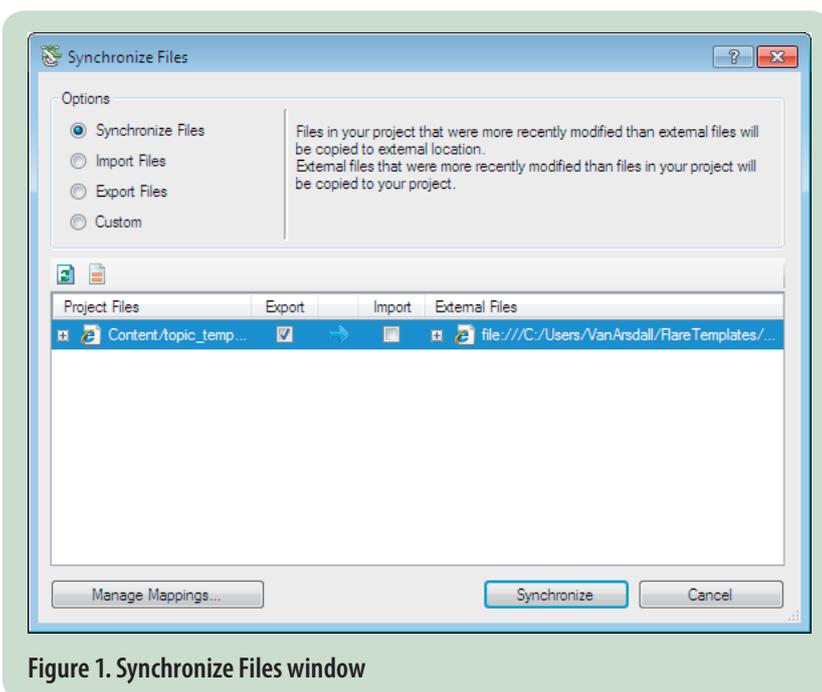
you can use the keyboard to select and accept an entry.

Auto Suggestion gives you more control over automating text entry than its predecessor. You can add a custom Auto Suggestion file to your project and use the file to build a preferred list of frequently used words and phrases. This 'trains' Auto Suggestion to recognise text that you frequently type.

Structure Bars with modified design

The Structure Bars in the Flare editor provide a visual representation of the XHTML structure used in a topic. In previous versions of Flare, the bars represented text and table formatting separately.

In Flare 7, the separate Structure Bars for tables are no longer present. Table structure has been integrated into the main Structure Bars. In addition, the bars provide a more granular view of the table markup. You can drill down to the cell level and see the interior tags (such as lists) that are applied to cell content. This useful enhancement gives the editor a much cleaner, less cluttered appearance (Figure 2).

New paste options

Pasting text into Flare from another source has sometimes been unpredictable. Flare 7 replaces the rather intimidating **Paste Text** window with a new, powerful Paste icon.

Flare's Paste icon resembles that of Microsoft Word, but the pop-up menu in the Flare version
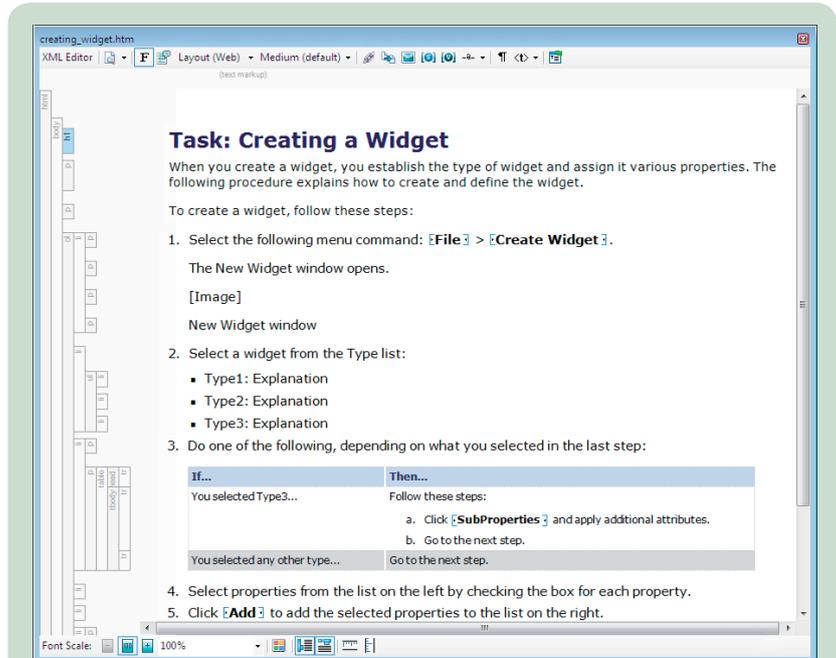
Figure 2. Flare editor with structure bars on the left

gives you more options: paragraph, paragraph block, inline text, table, or list. I find the inline text option especially useful for integrating pasted text into the destination text without having to clean up formatting.

When you paste tables or table text, the Paste icon's dynamic pop-up menu shows commands for table formatting. The menu changes

Figure 3. Flare 7 Equation Editor

according to whether you are converting a table to text, cutting columns, cutting rows, or merging tables. This article further discusses Flare 7 table enhancements in a later section.

Equation Editor
Flare 7 supports the Mathematical Markup Language, or MathML. Along with this capability, MadCap has added a new Equation Editor to enable writers to build equations and insert them into topics.

The **Insert > Equation** menu command launches the new editor (Figure 3), which offers templates for various types of equations. You can view equations in either of two views: *Design* or *Source*. The latter view shows the MathML markup.

When building output, Flare converts equations into images. XHTML output renders them as raster images, and PDF output renders them as vector images. For optimal accessibility, the Equation Editor provides options for adding a screen tip and alternate text (alt text) attribute to the equation properties.

Enhanced support for table insertion and editing
Options for inserting and editing tables are significantly enhanced in Flare 7:
- **Insert Table button:** This new button appears on Flare's Text Formatting toolbar. Similar to the equivalent button used in Microsoft Word, clicking the button displays a drop-down grid on which you can drag down and to the right to select the desired number of rows and columns.
- **Convert table to text:** As an example, if you select a nine-cell table and select the Convert to Text command, Flare creates nine paragraphs. The dynamic Paste icon remains available,

enabling you to try other paste options.
- **Convert text to table:** You can accomplish this task by simply selecting the text, then using Flare's Table menu command (**Table > Insert > Table**) to set up the table structure.
- **Sort rows:** You can sort table rows in ascending or descending order.
- **Merge tables:** If you have two differently styled tables separated by an empty paragraph, you can determine which style takes precedence when you delete the paragraph and merge the tables.
- **Reset Local Cell Formatting:** Unlike previous versions of Flare, this command affects only selected cells, rather than the entire table.

Enhanced support for table styles
The Flare 7 Table Style Editor looks similar to the previous editor, but it includes many improvements. It also gives you much more control over table properties and style usage. Using the new editor, you can:
- Specify that certain properties such as padding be different in specific areas of a table
- Exert more control over row and column patterns, including their names and their behaviour
- Create a custom pattern type for rows or columns and use it to override other patterns in specific instances of styled tables
- Use a new Medium drop-down list inside the editor to specify different settings for different style sheet media (online and print) in one place
- Use a new **Apply Style** command to apply a table style to selected files, folders, or to all topics in a project. This is a significant and welcome improvement.

Quick Response (QR) codes
Flare 7 enables you to insert Quick Response (QR) codes into topics. A QR code is a type of barcode designed to be read by devices such as smartphones. QR codes can encode text, a URL, an e-mail address, a contact card (vCard), or SMS message text. To read a QR code, your phone must have a special reader application. Several readers are available at no cost.

In describing one use case for QR codes, MadCap suggests that you could provide a code for employees who are doing field work and need access to your online help. If you design for this use case, I recommend that you use Flare's Mobile skin (introduced in Flare 6) to design your help for viewing on a mobile device.

Support for new vector image formats
Flare 7 supports three new vector image formats:
- Scalable Vector Graphics (SVG), an XML-based format
- PostScript (PS)
- Encapsulated PostScript (EPS).

These file types primarily serve to provide better image clarity in printed output. If the

images are used in WebHelp output, Flare converts them to .png files.

Conducting editorial reviews

Because Flare is a topic-based writing tool, you can send individual topics for review at any point in the information development cycle. I find that clients often prefer this approach, as they don't like to be overwhelmed by reviewing a large help system or PDF guide all in one go, especially if they are seeing the content for the first time. When your completed work is ready for production, clients can then view topics that they have already read in the context of the full product.

Previous versions of Flare supported author annotations, topic reviews, and contributions by outside authors. Flare 7 extends all of these capabilities with enhanced review features. Some features are designed to work with MadCap's new *Contributor* product, which consolidates the former X-Edit product family. This review discusses only the features that are native to Flare 7.

The menu bar now includes a **Review** menu. This menu and the equivalent Review toolbar now include a Track Changes feature. You can set options for Track Changes using the **Review Options** tab, accessible from the Review menu. For example, you can specify your user name and initials. You can also specify how changes appear in your files.

The Track Changes feature follows industry-standard conventions. You can show or hide changes, navigate through changes, and accept or reject them.

Annotations (author comments), which previously appeared in a separate pane, now appear in the XHTML Editor (Figure 4).

Building, analysing, and refining

As you develop content, you typically build output in designated formats such as WebHelp and PDF. As you build output, the Flare compiler displays messages to notify you of any issues that you need to address. One of those issues is accessibility compliance.

Accessibility features and enhancements

While Flare has always included features to support web accessibility requirements and standards, Flare 7 takes accessibility to a new level.

All Flare targets (output configuration files) for WebHelp and PDF now include a Warnings tab for accessibility checking (Figure 5). If you turn on the warnings, the Flare compiler will check for accessibility problems during a project build.

The compiler identifies and reports the following types of problems:
- Images, equations, and QR codes that are missing an alt text attribute
- Tables that have no caption or summary
- Tables without a header row
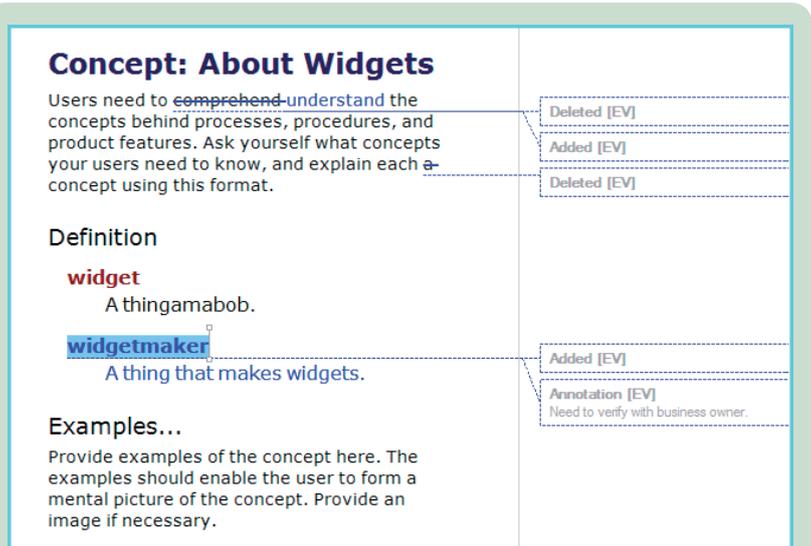
Figure 4. Tracked changes and annotations
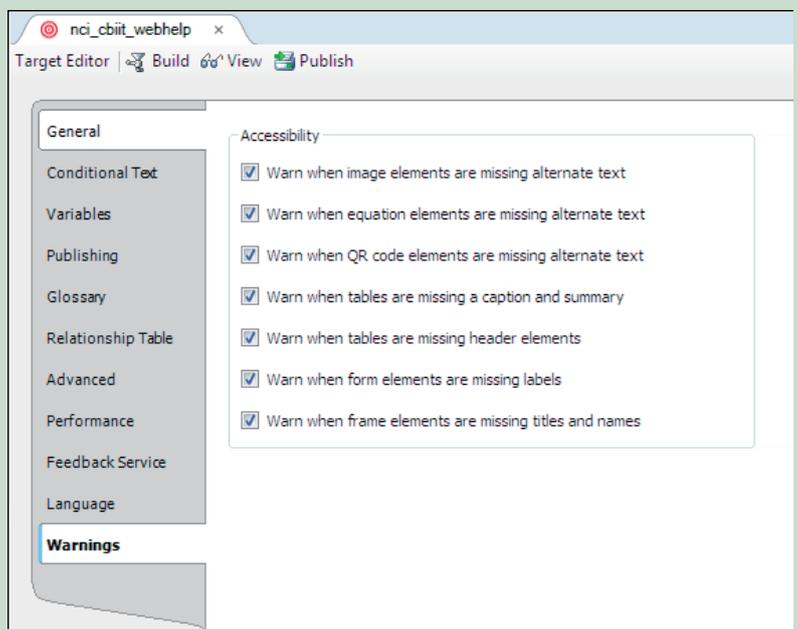
Figure 5. WebHelp Warnings tab

- Form elements with missing labels
- Frame elements without a title or name.

You can click the compiler's **Save Log** button to save a date-stamped log to the Reports folder in your Flare project. With the log file open, you can double-click on any row to open the corresponding file that produced the message.

Missing alt text attributes are a common accessibility issue. Unless you have added alt text to an imported image before inserting the image into multiple topics, some instances of the image may not include the attribute. Fortunately, the **Edit Picture** window in Flare 7 includes a time-saving check box labelled 'Apply the alternate text and screen tip to all image references'. After adding the attributes for one instance of the image, you can check this box to update all of the remaining instances.

During PDF compilation, Flare automates the following conversions for accessibility:
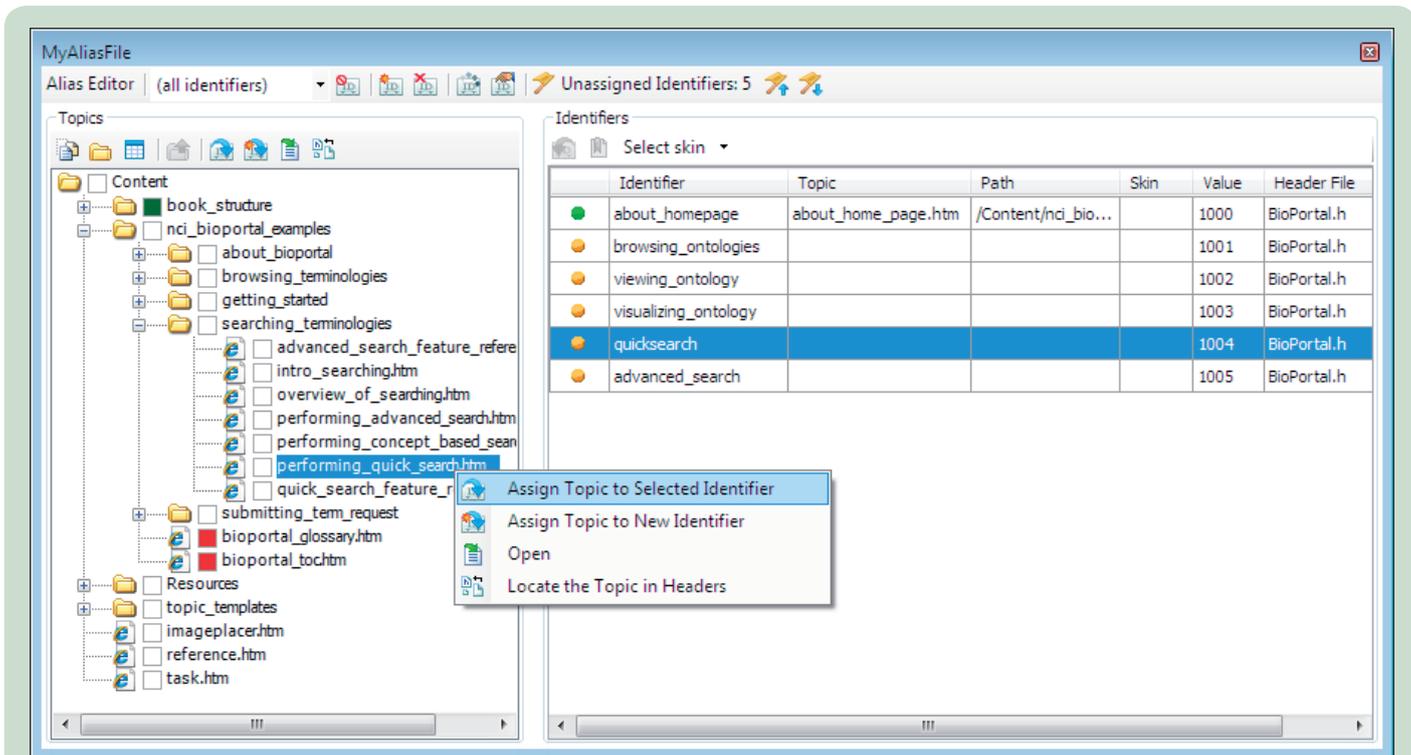
Figure 6. Flare 7 Alias Editor

- Converts each alt text attribute to its PDF equivalent so that a screen reader can properly describe each image.
- Converts XML *lang* attributes to their PDF equivalent for the entire PDF file and for any languages that may be applied to specific XHTML elements.
- Converts table structures to their PDF equivalent so that screen readers can properly read them.

The PDF target includes a PDF Options tab, with some options that duplicate certain settings found in Adobe Distiller and Acrobat (such as Image Compression and Initial View). You will also find a **Generate tagged PDF** setting, which enables you to generate the PDF build with structured tagging. The tagging is similar to the structure of the source XHTML files in your project. Although PDF tagging increases the file size, it is required for making a PDF file accessible to screen readers. If you have ever post-processed a PDF file to add tagging, you will appreciate the automation that Flare now offers.

New Reports

To further analyse your project output, you can add a new report file, select what you want to include in the report, and then generate the report. Flare 7 adds a number of useful report options for analysis.

One of the available report categories is Context-sensitive help (CSH). Let's say that you have generated a report to analyse your CSH setup. The report lists several topics under the category 'Topics Not Linked By Map ID'. You can quickly map those topics using Flare's Alias Editor.

Redesigned Alias Editor

New help authors often find setting up context-sensitive help a bit daunting. The interplay between alias (.ali) files and header (.h) files can be confusing.

The redesigned, elegant Alias Editor in Flare 7 simplifies the process of mapping topics to identifiers and building a header file. The editor has a clean layout, with a Content tree structure on the left, and an Identifiers table on the right (Figure 6). The first column in the table marks unassigned identifiers with an orange icon. Assigned identifiers have a green icon.

The Alias Editor enables you to add identifiers to single files, selected multiple files, or the entire project. You can associate a header file with the alias file and generate its contents.

Assigning topics to identifiers is easy:

1. Select an unassigned identifier in the Identifiers table.
2. Right-click a file in the folder tree on the left.
3. Select **Assign topic to selected identifier**. The Identifier table adds the file name and the path.

As you assign identifiers and set up your context-sensitive help, Flare builds a header file that you can give to your software development team.

Summary

MadCap Flare has always provided a comprehensive feature set for single-sourcing and content management. Flare 7 extends these capabilities to cover the entire spectrum of information development. Download a trial of Flare 7 at www.madcapsoftware.com/downloads **C**

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