Software review: MadCap Flare 2017 r3

Reviewed by Jayna Locke

As a technical publications manager, I needed a tool refresh about three years ago. My team and I discovered MadCap Flare and launched a journey to adopt the tool and convert our large library of critical content from many different source tools to MadCap Flare. Our chief motivator was the need for an improved single sourcing methodology. The ability to quickly develop new material from existing material using conditions and variables was the main win from an ease-of-use perspective. We also moved to a model of creating both HTML and PDF outputs from the source for all of our documentation, with the exception of print documents such as quick start guides.

We continually watch for new features and functionality as MadCap Software enhances Flare.

New functionalities in Flare 2017 r3

Text analysis

MadCap Software added a Text Analysis tool to this version, enabling us to assess the readability of our content. Located in Flare's Tools menu, the Text Analysis tool allows you to check the readability of any topic by clicking an Analyze button. The results include both Flesch-Kincaid reading ease score and grade level. Good results appear green, fair results appear yellow, and poor results appear red.

We have used readability scoring tools in the past. The free tool we used most frequently went to a paid use model and we discontinued use. Another option is to paste content into Microsoft Word and use its built-in scoring capability. But in practical terms, an entire team of writers developing many volumes of content will not take the time. There is a clear benefit to this functionality being built into the tool.

We like the fact that the tool provides two scores, as they have different ramifications. Grade level is as you would expect. If your content is consistently geared to the 12th grade level, for example, you are essentially assuming that users reading your documentation have successfully completed high school. While this may be the case, it might be an indicator that you are making the reader work to understand your documentation. Commonly, technical writers aim to maintain a grade level at or below 8.0.

The Flesch-Kincaid Reading Level is an indicator of the reading ease on a scale from 1 to 100, with higher scores indicating better readability. Reviewing these two scores at a glance provides a quick indication if the writer should consider reducing sentence length and check for use of technical jargon.

Thesaurus

The built-in thesaurus available in this version of Flare enables you to find related terminology for any specific word. For example, starting from Flare, you can select a word within a topic and click Shift-F7 to open that word in the search window of the Thesaurus, which will list related terms. If applicable, the available related terms are listed in categories. You can then right-click a replacement term from the Thesaurus and select Insert to replace the term. Another option is to copy the related term from the Thesaurus to paste where needed in the topic.

Repeat Last Action Shortcut

Most technical writers find the use of macros or keyboard shortcuts to be an enormous time-saver. Many software tools come with built-in macros as well as the ability to create additional macros to suit your needs. Then it's a matter of memorizing the macros for your favorite and most repeated tasks. A common repeat task is simply to do the same thing again that you just did. This is the function of the Repeat Last Action Shortcut. Using it involves pressing F8 after you've performed any action. This is useful for actions that require more than one keyboard key, as it shortens keys pressed to just one.

Style Inspector

MadCap Flare's character format styles are encoded in the tool's CSS. Our team has a style administrator whose role it is to establish and maintain our CSS in a global project that is available to all writers. If we need a style change, the administrator makes those changes in the stylesheet for the global project and informs the team. Then, the team members must pull the updated project into their local instance of the tool and update their individual projects with the enhanced styles.

We worked long and hard to refine our stylesheets, and fortunately we had the talent on our team to do so. For those who do not have the expertise, are just beginning the process of

establishing the look and feel of their documentation, or regularly update their styles, the Style Inspector is a very good addition to Flare's capabilities (see Image 1).

Rather than directly editing the CSS, followed by performing a separate review and analysis of the change, you can make the changes in the Style Inspector and view them immediately in the content. The Style Inspector shows the style's attributes, such as font weight and color, while the content displays the change in appearance based on style changes.

One of the most useful aspects of this tool is to find and fix local formatting. We highly discourage local style changes (also called "over-formatting"), as those changes cannot be fixed with global updates. For example, if you manually changed text strings to red throughout a document wherever you needed emphasis, but you then decide you want to indicate emphasis with black font and italics instead, you can't update all of the local changes with one stylesheet change.

However, the Style Inspector identifies local formatting for you. The tool indicates the local change with

strikethroughs in the Style Inspector window. If you want to, you can fix the local formatting in the tool. Alternatively, you can convert the locally formatted change to a style class from the Style Inspector if you prefer.

Advanced Microsoft Excel import

This feature enables you to import XLS, XLSX or CSV files. You can also add equations. Our content rarely involves equations or spreadsheets. However, we tested the functionality in the event that it may come in handy.

There are several possible ways to import a spreadsheet. For our purposes, we tested importing a spreadsheet into an existing project from the Project > Import menu.

Once you select the MS Excel Workbooks option, and specify whether you want to import the file(s) into a new or existing project, you follow the wizard prompts. Among the options available in the wizard, we found the following to be of interest:

- You can add multiple files at once.
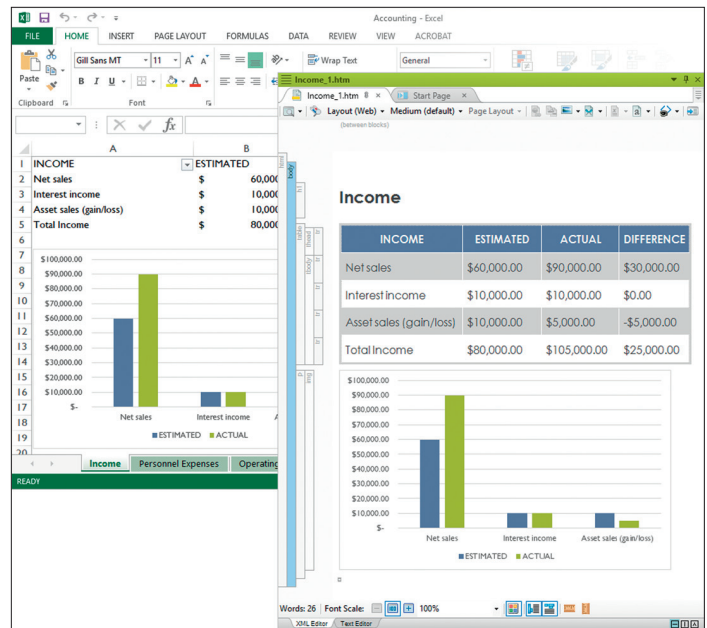- You can select to link the generated files to the source files in order to enable connectivity between

Image 2: The advanced Microsoft Excel Import feature

Source: MadCap Software

the spreadsheet in Flare and its original file.

- You can choose whether to import the files into topics or snippets.
- You have the option of splitting your Flare topics based on a set maximum number of rows, with a default of 30.
- You can enable automatic updates to the files before the output is generated.
- A small preview window allows you to review and accept the resulting files.

The import functionality worked well. The spreadsheets were imported seamlessly. Based on the selections made, the tool generated a new folder within the project, and split out the imported spreadsheet into 12 separate topics (Sheet1.htm, Sheet2.htm, etc.) within the folder.

Performance improvements

While this update is not a feature enhancement, it was one of the most noticeable benefits of our recent

upgrade to the new version of Flare. Everyone on my team spoke highly of the faster speeds and their improved efficiency.

ⓘ ABOUT THE AUTHOR

Jayna Locke
is a content strategist with a background in technical communication and digital marketing. Her experience includes content strategy, SEO, copy writing, technical writing, team building, and technical publications team management. Her team moved to Madcap Flare as their technical publications source tool in 2015.

🐦 @jaynalocke
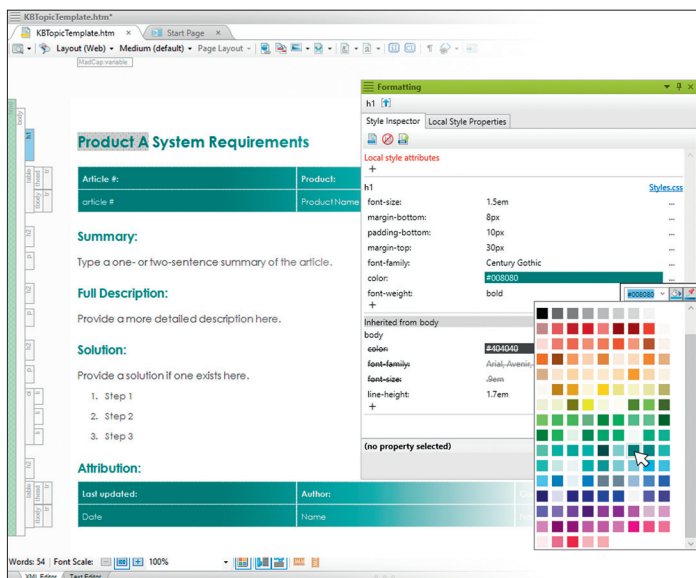
in www.linkedin.com/in/jaynalocke

Image 1: Style Inspector added to the Formatting window pane

Source: MadCap Software