



Cleaning Up the Clutter: Refresh Your MadCap Flare Project Design

PRESENTED BY

Nate Wolf

AGENDA

1

Signs of Needing a Refresh

2

Global Project Linking

3

Refreshing Your Project

4

Staying On Track

5

Questions

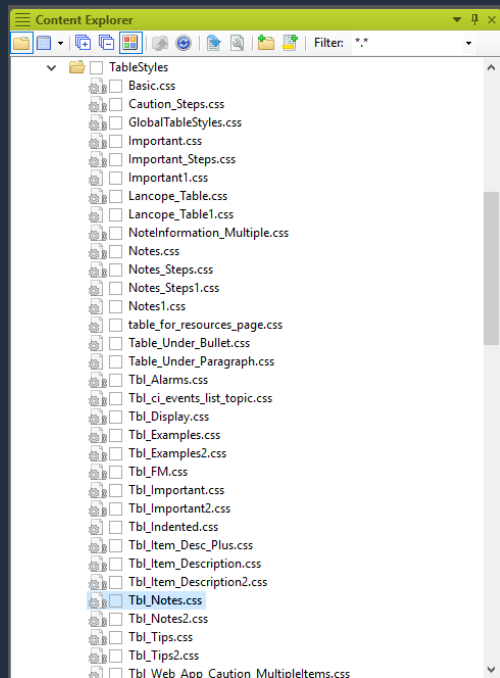
SIGNS YOUR PROJECT NEEDS A REFRESH

- Multiple Stylesheets and/or TableStyles
- Unused or inefficient file usage
- Old HTML design/not responsive
- Local Formatting
- Not using Project Properties



MULTIPLE STYLESHEETS/TABLE STYLES

- Styles getting out of hand much?



INEFFICIENT FILE USAGE

- Unused topics
- Similar topics used for different purposes
- TOCs for every version of a product

Rethink the ways you use files



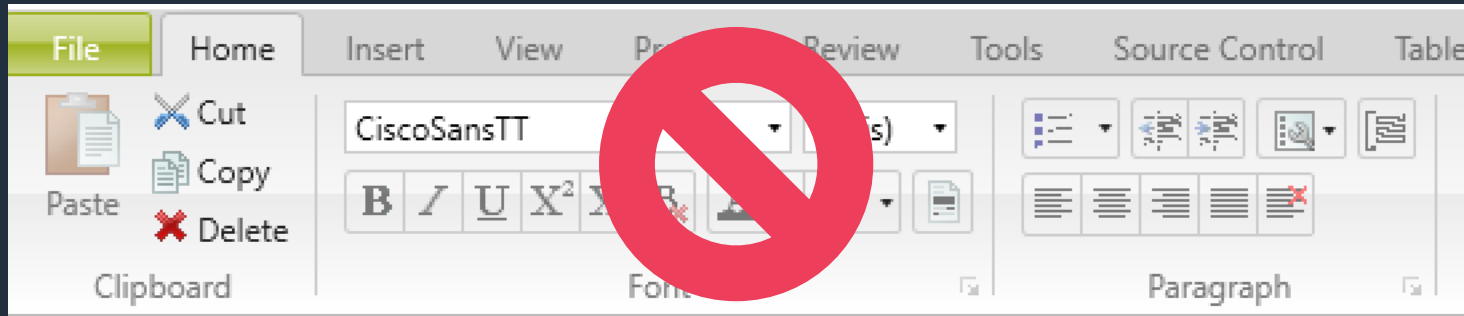
OLD DESIGN

- Want to move from Tripane?
- Does your layout and design look like it's from the 90's?



LOCAL FORMATTING

- Styles overridden with local formatting

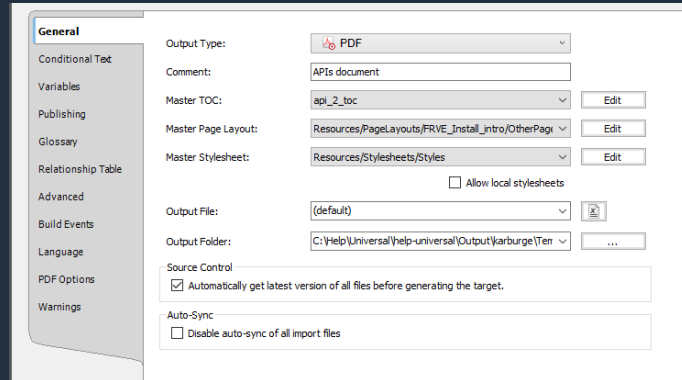


LOCAL SETTINGS

Not set at project level



- Target Level
- Even worse, topic level



Global Project Linking

START WITH A GLOBAL PROJECT

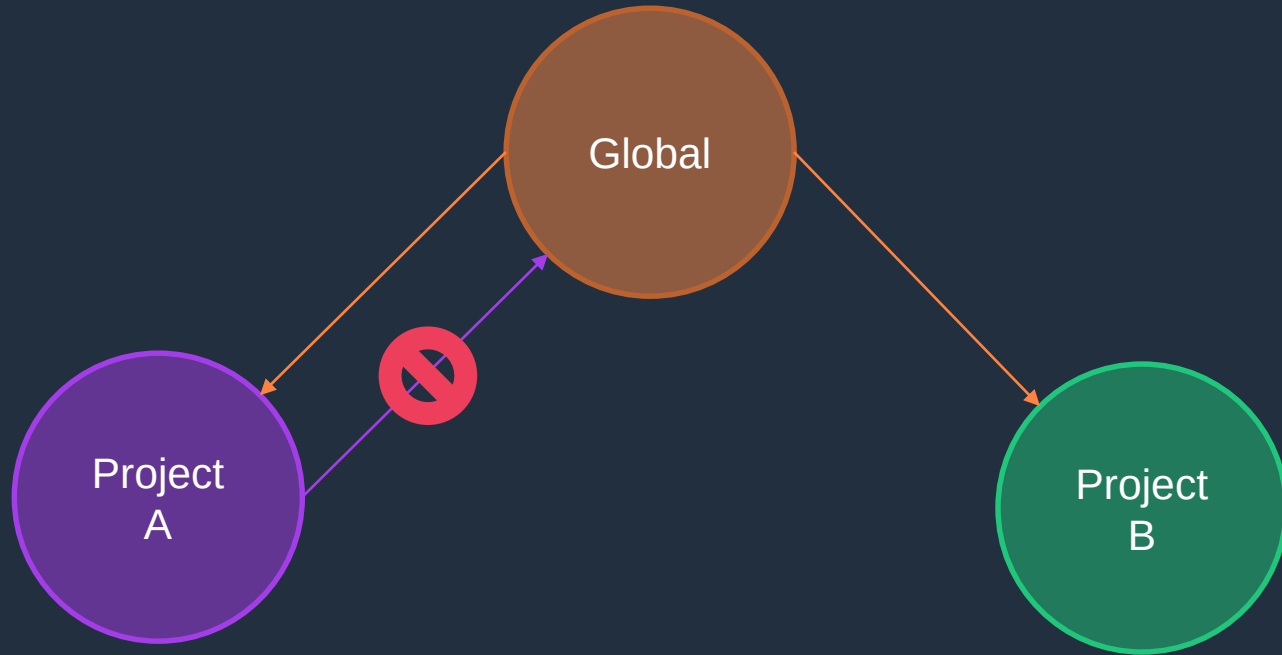


- Stylesheets
- Variables
- Master Pages
- Table Styles
- Page Layouts
- Snippets

WHY USE A GLOBAL PROJECT?

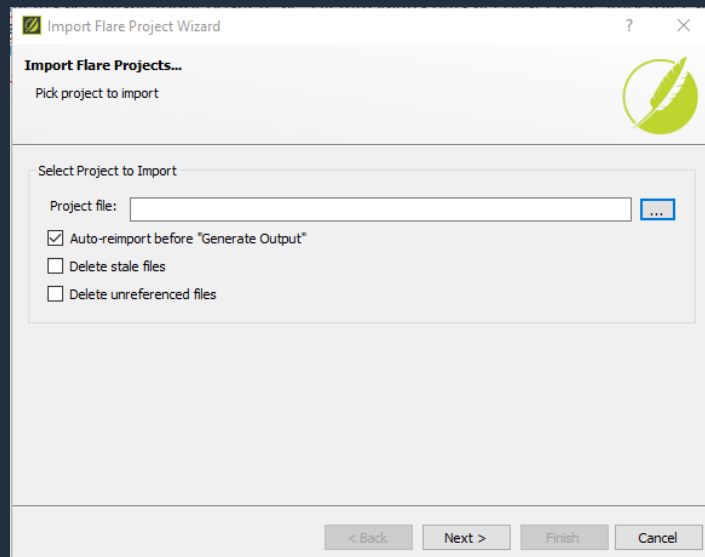
- Files maintained in one place
- Gatekeeper
- Future-proof your documentation strategy

GLOBAL PROJECT LINKING



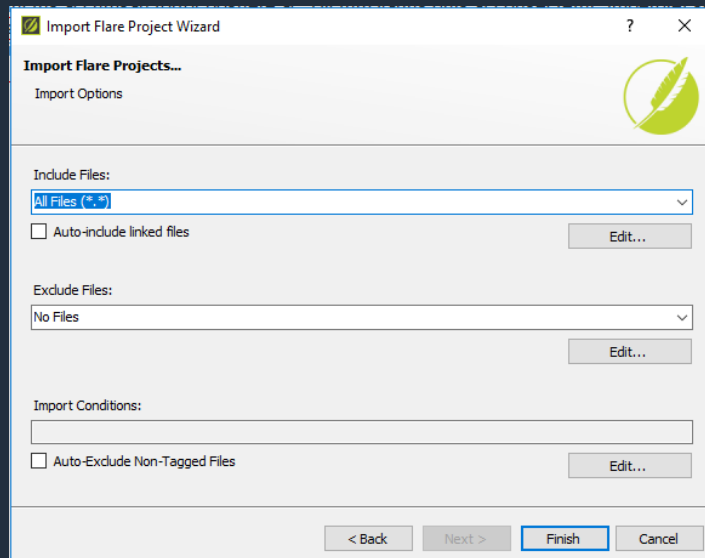
SETTING UP GLOBAL IMPORT FILE

In your child project(s)



SETTING UP GLOBAL IMPORT FILE

Set up import options



The screenshot shows the 'Import Flare Project Wizard' dialog box, specifically the 'Import Options' step. The window title is 'Import Flare Project Wizard' with a question mark and close button. The main title is 'Import Flare Projects...' and the subtitle is 'Import Options'. There is a green leaf icon in the top right corner.

The 'Include Files:' section has a dropdown menu set to 'All Files (*.*)'. Below it is a checkbox for 'Auto-include linked files' and an 'Edit...' button.

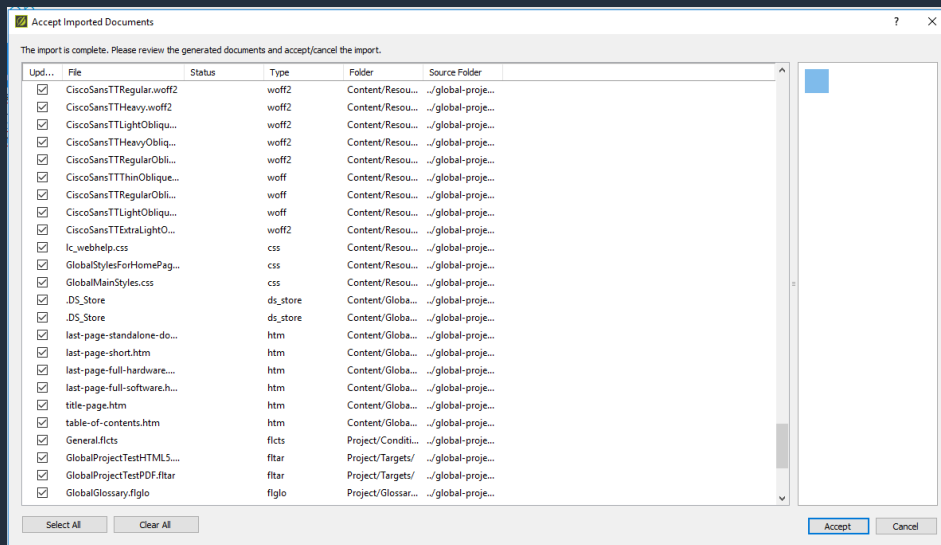
The 'Exclude Files:' section has a dropdown menu set to 'No Files'. Below it is an 'Edit...' button.

The 'Import Conditions:' section has a text input field and a checkbox for 'Auto-Exclude Non-Tagged Files' with an 'Edit...' button.

At the bottom, there are four buttons: '< Back', 'Next >', 'Finish' (which is highlighted with a blue border), and 'Cancel'.

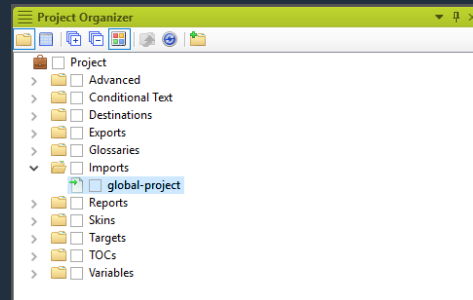
SETTING UP GLOBAL IMPORT FILE

Accept files



REIMPORTING GLOBAL PROJECT

Reimport manually or automatically



Project Import Editor | Reimport...

Source Project

Imported Files

Removed Links

Source Project:

C:\Help\global-project\global-project.fprj

☒ Auto-reimport before "Generate Output"

☒ Delete stale files

☐ Delete unreferenced files

Include Files:

All Files (*)

☐ Auto-include linked files

Exclude Files:

No Files

Note: These fields let you select file types (e.g., topic files, snippet files). To import or exclude specific files: (1) save your changes in this editor; (2) click the Import or Re-Import button above; and (3) in the Accept Imported Documents dialog, make sure a check mark appears next to the files you want to include.

Import Conditions:

☐ Auto-Exclude Non-Tagged Files

Browse...

Open

Edit...

Edit...

Refreshing Your Project

Disclaimer

- Not a complete list
- Every project is different





KEEP. IT. SIMPLE.

BACKUP PROJECT(S)

I cannot stress this enough!

- Create a backup of your child project(s) for testing
- If anything goes wrong, you'll have a working backup

REVISIT YOUR STYLE SHEET(S)

- Look at stylesheet implementation
 - Most likely can create a new one (run reports)
 - Think simple
- Use templates
- No need for styles that perform same function
 - Multiple indent styles
 - Over-defining styles

Revisit Layout Files

- Moving to a new HTML design?

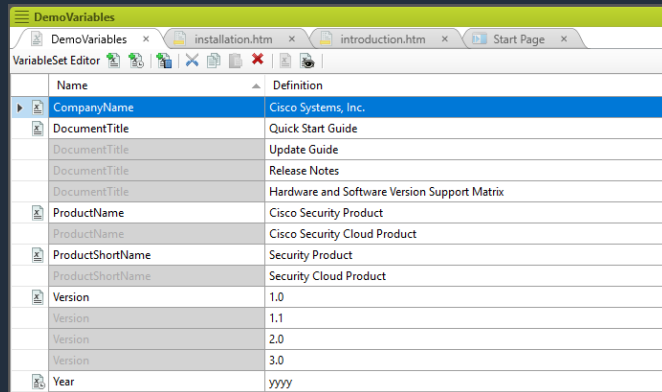


- Want to update your PDF design?



REVISIT VARIABLES

- Add new variables?
- Start using them?



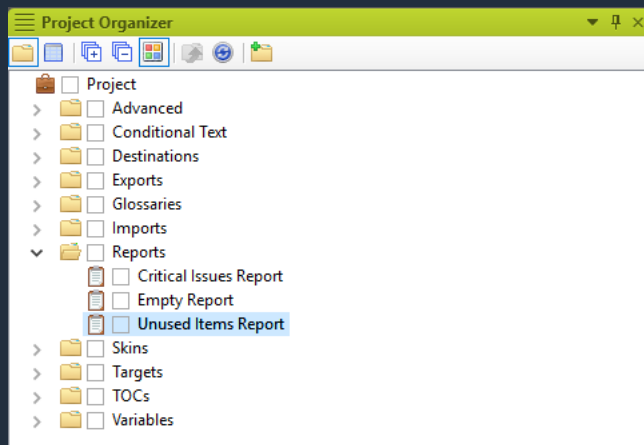
The screenshot shows a web browser window titled "DemoVariables" with multiple tabs. The "VariableSet Editor" is open, displaying a table of variables. The table has two columns: "Name" and "Definition".

Name	Definition
Company/Name	Cisco Systems, Inc.
DocumentTitle	Quick Start Guide
DocumentTitle	Update Guide
DocumentTitle	Release Notes
DocumentTitle	Hardware and Software Version Support Matrix
ProductName	Cisco Security Product
ProductName	Cisco Security Cloud Product
ProductShortName	Security Product
ProductShortName	Security Cloud Product
Version	1.0
Version	1.1
Version	2.0
Version	3.0
Year	yyyy

- Find and Replace with a variable
 - `<MadCap:variable name="DemoVariables.ProductName" />`

RUN REPORTS

- What items are currently unused?



REPORTS

Unused Items Report

Unused Items Report x Start Page x

Report Editor

General

Styles

Archive

Title:

Tables:

Topics

Select all

☐ Accessibility Suggestions

☐ Broken Bookmarks

☐ Broken Links

☐ Cross-Reference Suggestions

☐ File Word Count

☐ Files With Snippet Conditions

☐ Markup Suggestions

☐ Non-XML Topics

☐ Topics Linked By Map ID

☐ Topics Not In Any TOC

☐ Topics Not In Index

☒ Topics Not Linked

☐ Topics Not Linked By Map ID

☐ Topics With Concept Links

☐ Topics With Concept Links Missing a Concept

☐ Topics With Keyword Links

☐ Topics With Keyword Links Missing a Keyword

☐ Topics With Meta Tags

☐ Writing Suggestions

Variables

Select all

☐ Files With Variables

☐ Topics With Snippet Variables

☐ Undefined Variables

☒ Unused Variables

☐ Used Variables

☐ Variable Suggestions

☐ Select all

☐ Skip empty reports

☐ Print report after generation

Report:

Add To Archive...

Open in Browser

Generate

Topics Not Linked

Count: 2

File: Content/Search-Results.htm

File: Content/Backmatter/last-page-hardware.htm

Delete Files

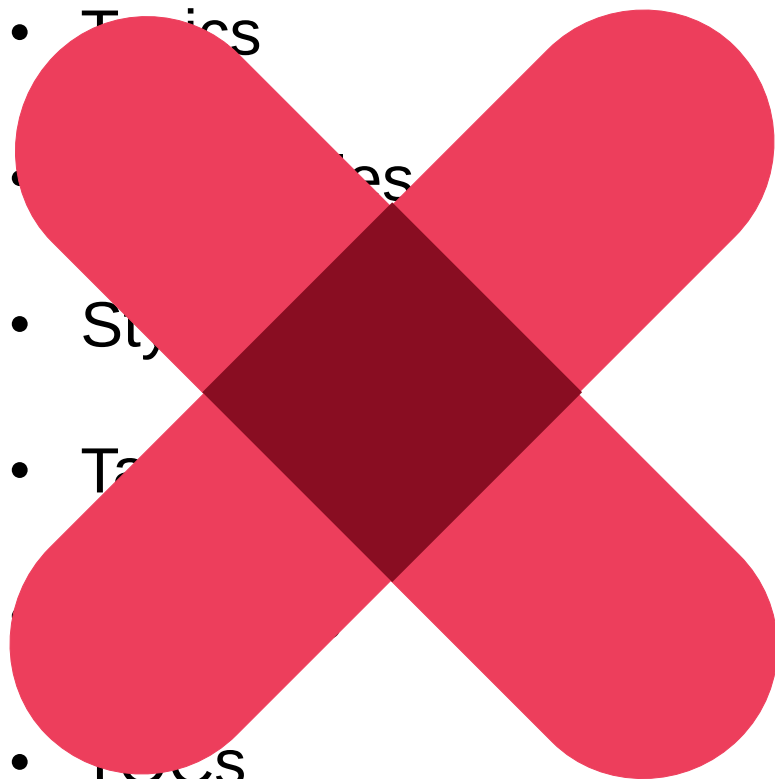
- Topics

- Files

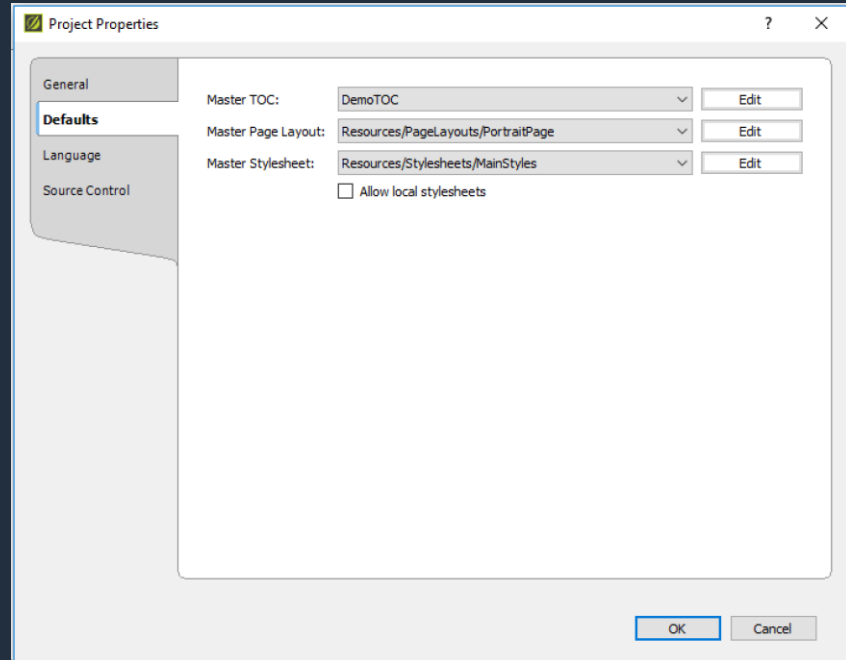
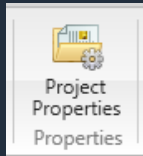
- Styles

- Tables

- TOCS

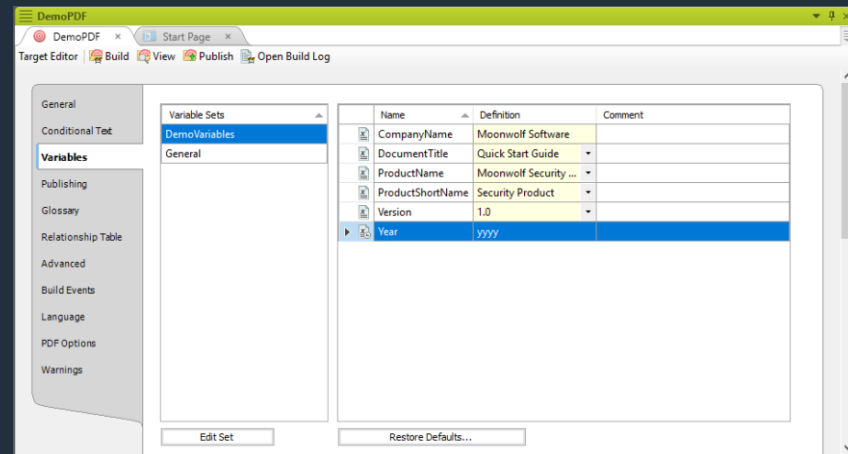
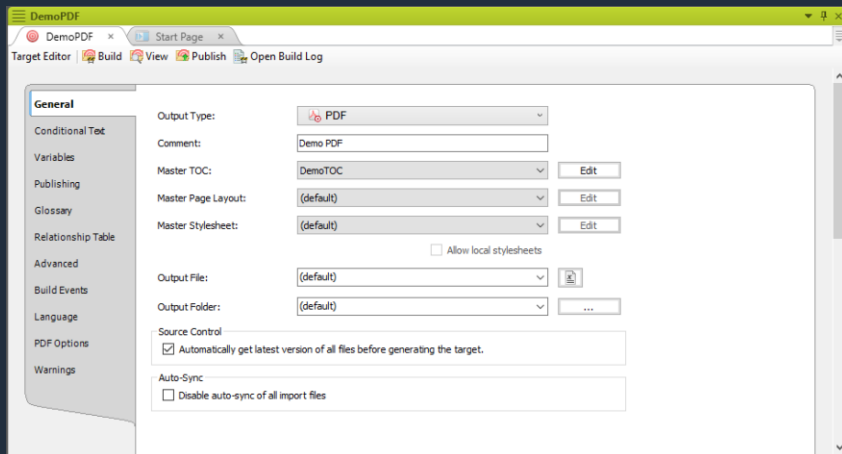


SET PROJECT DEFAULTS



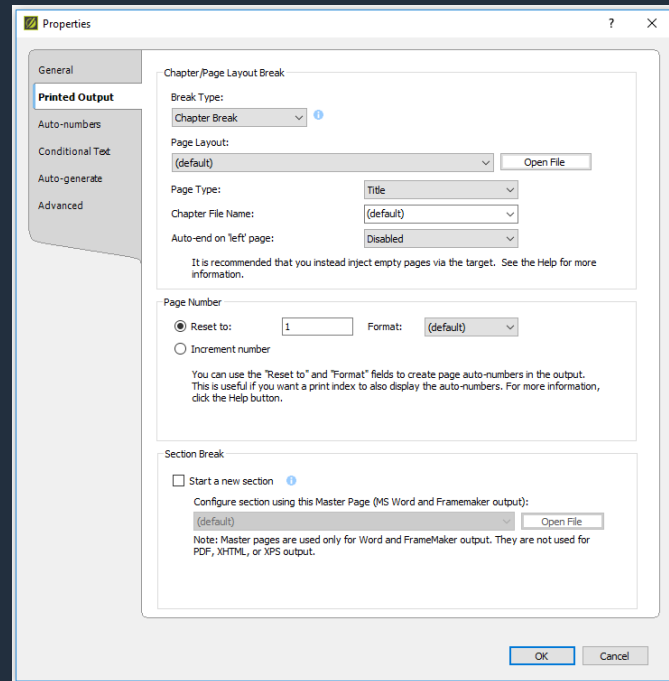
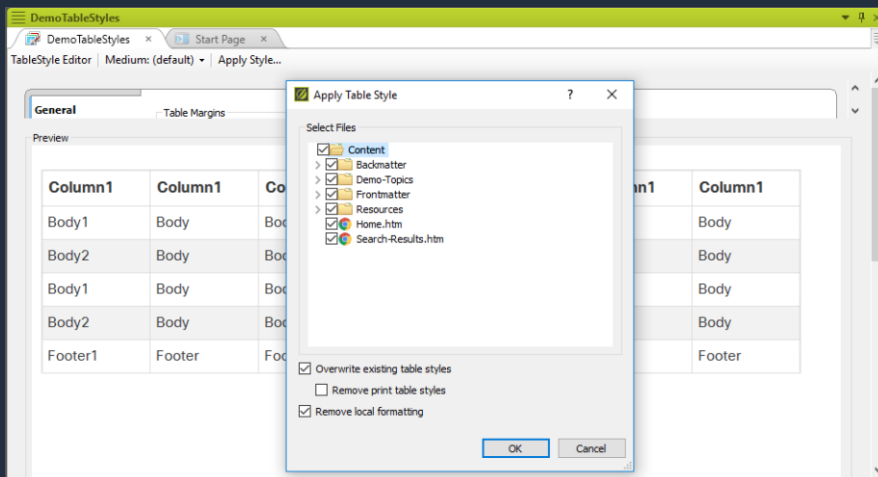
APPLY YOUR CHANGES

- Targets

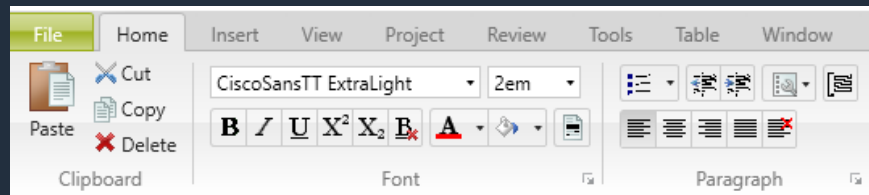


APPLY YOUR CHANGES

- TOCs
- Styles



REMOVE LOCAL FORMATTING



- **CTRL+A + Select**
 - Removes from entire file

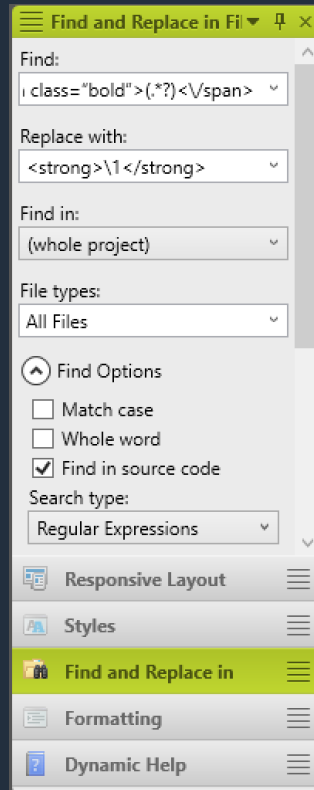
REPLACE OLD STYLES W/ REGEX

Regular Expressions (RegEx or RegExp)

Example

- Find
`<span class="bold">(.*)</span>`
- Replace
`<strong>\1</strong>`

<http://regexlib.com/CheatSheet.aspx>





IN SUMMARY

- 1 Go global!
- 2 Backup
- 3 Revisit Design Files
- 4 Run Reports
- 5 Delete Stale Files
- 6 Set Project Defaults
- 7 Apply your settings
- 8 Remove Local Formatting
- 9 Clean up with RegEx
- 10 Pat yourself on the back!

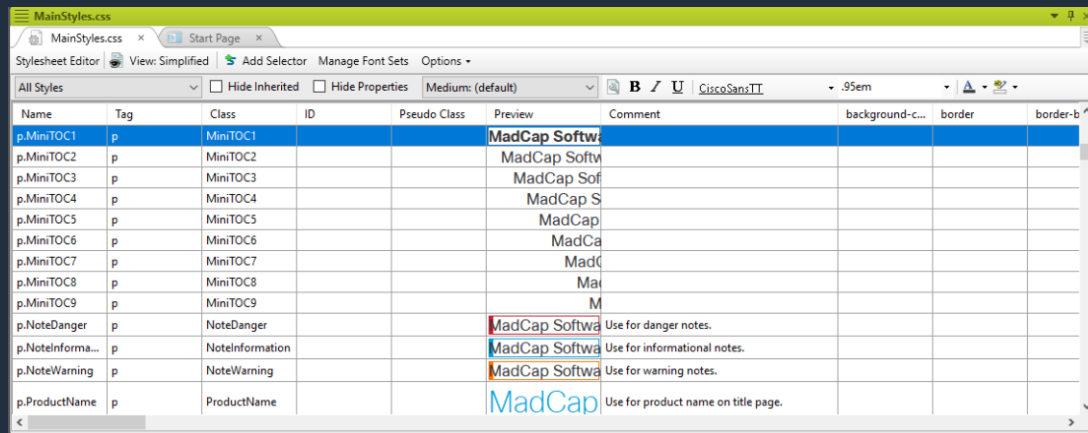
Staying On Track

DOCUMENT YOUR PROJECT

...in your project

Create files/comments in your project that details uses for:

- Styles (CSS)
- TOC setup
- Global project
- Etc.



The screenshot shows a 'MainStyles.css' window with a 'Stylesheet Editor' toolbar. Below the toolbar is a table listing various CSS styles. The table has columns for Name, Tag, Class, ID, Pseudo Class, Preview, Comment, background-color, border, and border-bottom. The styles listed include p.MinITOC1 through p.MinITOC9, p.NoteDanger, p.NoteInformation, p.NoteWarning, and p.ProductName. Each style has a corresponding preview and comment.

Name	Tag	Class	ID	Pseudo Class	Preview	Comment	background-c...	border	border-b
p.MinITOC1	p	MinITOC1			MadCap Softwa				
p.MinITOC2	p	MinITOC2			MadCap Soft				
p.MinITOC3	p	MinITOC3			MadCap Sof				
p.MinITOC4	p	MinITOC4			MadCap S				
p.MinITOC5	p	MinITOC5			MadCap				
p.MinITOC6	p	MinITOC6			MadCa				
p.MinITOC7	p	MinITOC7			MadC				
p.MinITOC8	p	MinITOC8			Ma				
p.MinITOC9	p	MinITOC9			M				
p.NoteDanger	p	NoteDanger			MadCap Softwa	Use for danger notes.			
p.NoteInforma...	p	NoteInformation			MadCap Softwa	Use for informational notes.			
p.NoteWarning	p	NoteWarning			MadCap Softwa	Use for warning notes.			
p.ProductName	p	ProductName			MadCap	Use for product name on title page.			

RUN REPORTS PERIODICALLY

- Run the same reports from earlier
- Set a timeline and reminders

DON'T ADD UNNEEDED JUNK

- Don't revisit bad habits
- Need to make a change?
 - Do it the right way!
- Create an archive project
- Remember, keep it simple



Thank You!

Questions?

