

I Just Bought Flare

Where Do I Start?!



Who Am I?

- » Neil Perlin – Hyper/Word Services.
 - Internationally recognized content consultant.
 - MadCap-certified Flare trainer/consultant since pre-v.1.
 - Helps clients create effective, efficient, flexible content, from hard-copy to mobile.
 - Also certified in Mimic, Viziapps, other tools.



The Problem

- » Flare has a load of features, *and* some major new ones in 12, that can leave you flailing if you're new.
- » Where to start?



A Recommendation

- » 8 minimum steps that will enable:
 - Clean creation of your first project.
 - Consistent creation of additional projects.
- » What follows is based on 11 years as a Flare certified trainer/consultant and 21 years of hypertext work prior to Flare.
- » **But always consider your specific needs.**

Those 8 Steps...

1. *Project* your outputs forward.
2. Plan for version control, if possible.
3. Plan for a master/child project structure.
4. Create topic type templates, maybe...

Those 8 Steps (cont'd)...

5. Create control file folders in Resources.
6. Create a CSS based on the templates.
7. Create 1+ table CSSs.
8. Set standards wherever possible.

Project Your Outputs

- » Project and prioritize your outputs.
 - To avoid using features that work well in some outputs but may not others, like Help Controls or expanding links.
 - To avoid setting up project structures like TOCs with many heads that work nicely in tripane but less so in topnav.

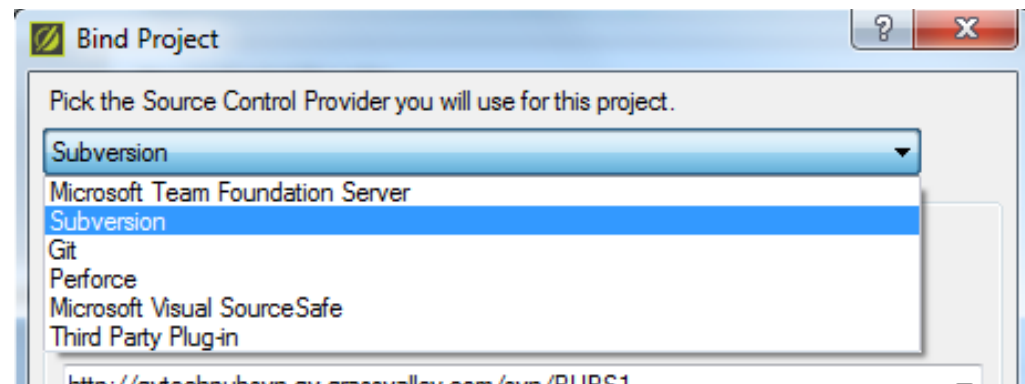
Project Your Outputs (Cont'd)

- » Set firm policies against hacks and local formatting to ensure smooth transitions to new outputs.



Plan for Version Control

- » Lets you put projects in a central repository and create local copies on authors' PCs.
- » Allows multi-author work, file protection, “diffing”, rollbacks.
- » Flare supports various tools natively.



Version Control Alternatives

- » No version control? Consider an alternative – don't just leave projects on local PCs.
- » Project on a backed up shared drive with Flare on C drive.
 - Work speed depends on network traffic, no VC benefits but project *is* backed up.

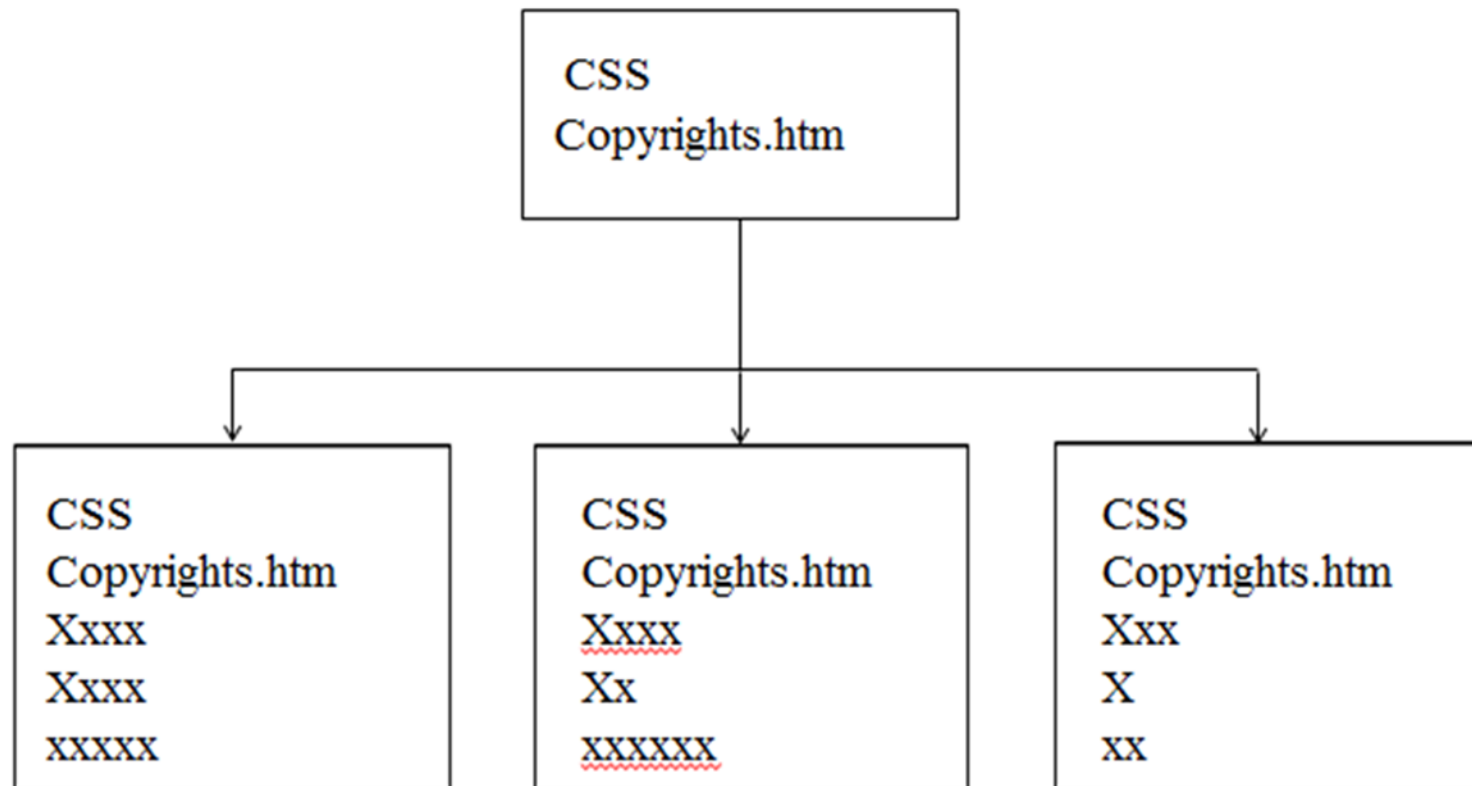
Version Control Alt's (Cont'd)

- » Project and Flare on C drive, project copied periodically to backed up shared drive.
 - Like first option but without network issues.

Plan for Master/Child Structure

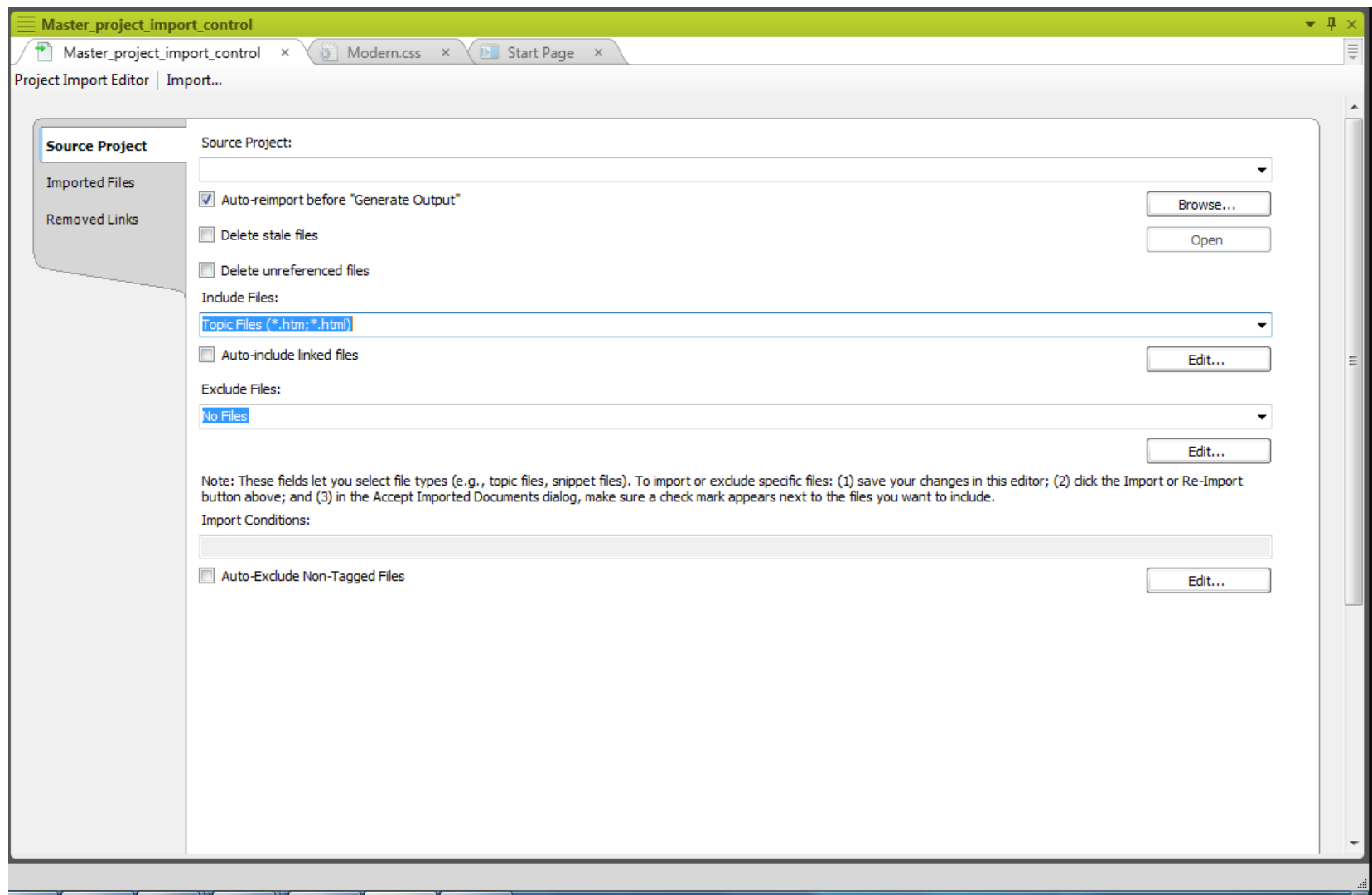
- » Lets you create a master project containing standard files that child projects are to use.
 - Syncs child projects to the master.
 - Download shared files from master to child.
 - If master or child author changes the file, Flare re-downloads the master version.
- » Provides semi-invisible consistency across projects.

Plan for Master/Child Structure



» Set up via the Flare Project Import feature.

Flare Project Import Feature



Plan for Master/Child Structure

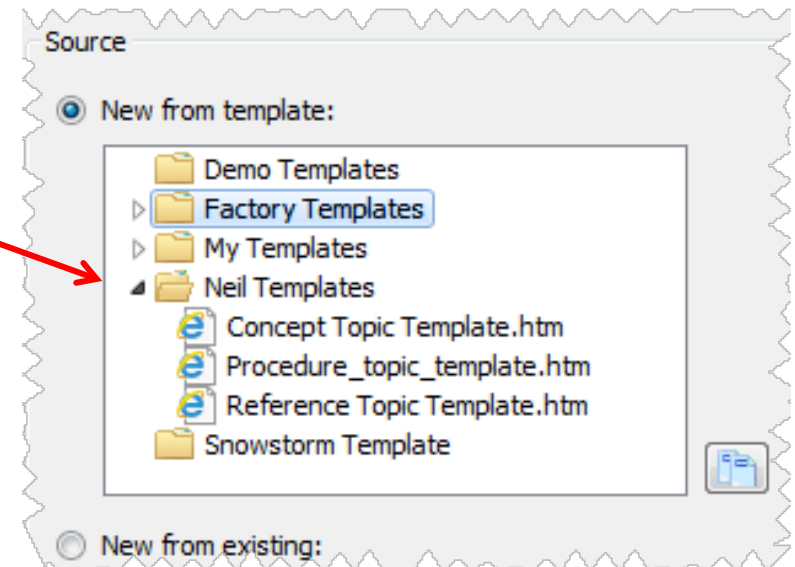
- » Name projects to clearly indicate their role in the hierarchy – e.g. Widget Help Master, Widget A Child, Widget B Child, etc.
- » Carefully define the structure, number of hierarchy levels, files to use in each level.
- » Document the structure to avoid “zombie projects”.

Create Topic Type Template(s)

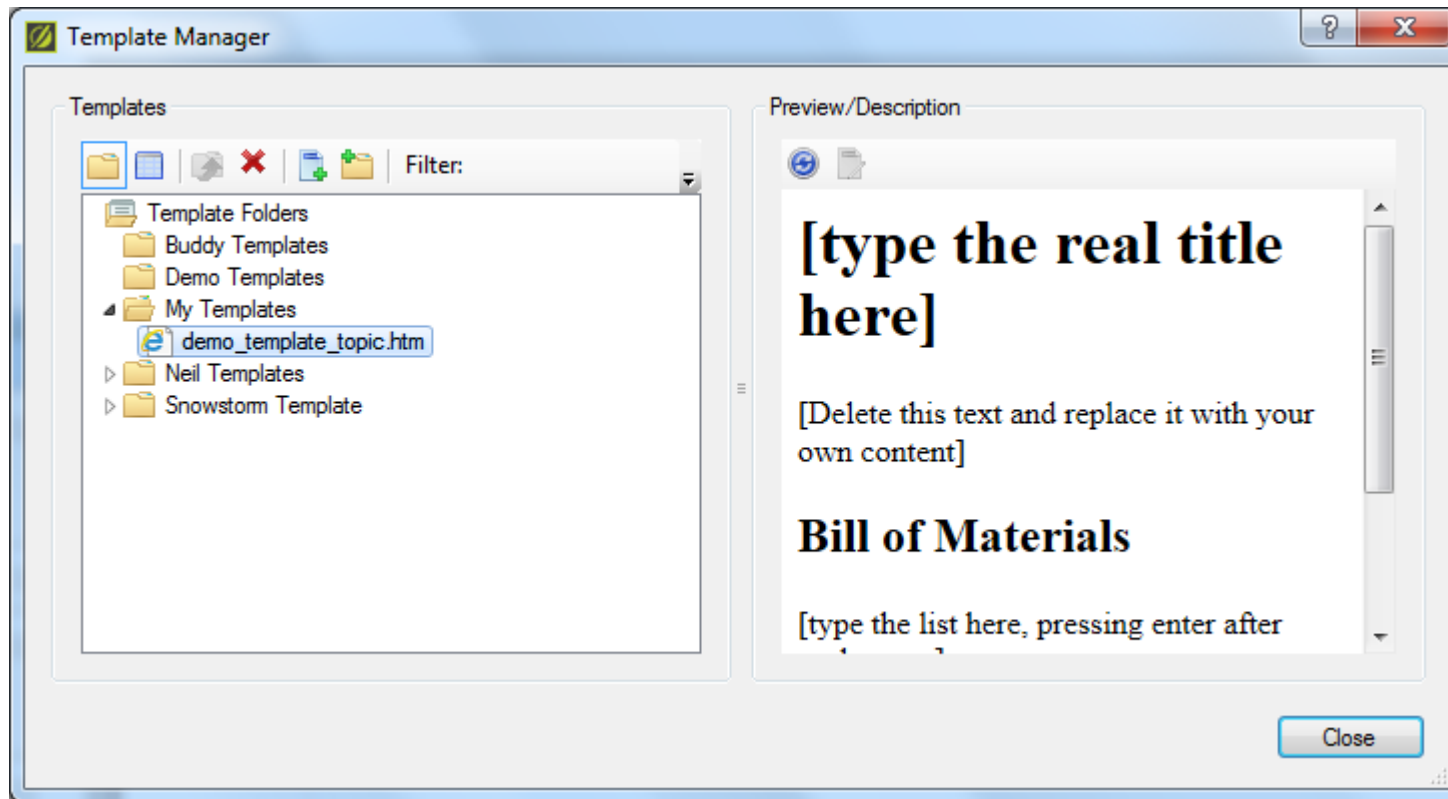
- » Analyze your content to define the standard types, like concept, procedure, reference.
 - *Doesn't mean DITA.*
- » Use the types' elements to create standard topic type templates, if needed...

Create Template(s) (Cont'd)

» Add the templates to Flare's interface using the Template Manager feature.

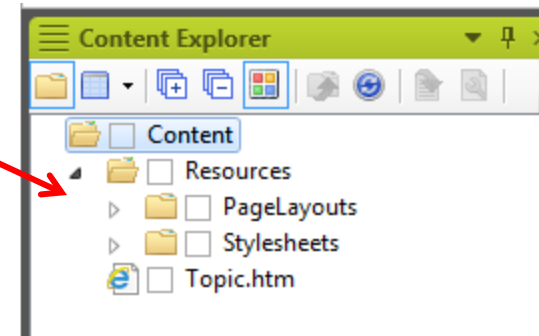


Template Manager



Define Control File Folders

- » Predefine subfolders in Resources for control files that don't automatically get one, like table CSSs – here.



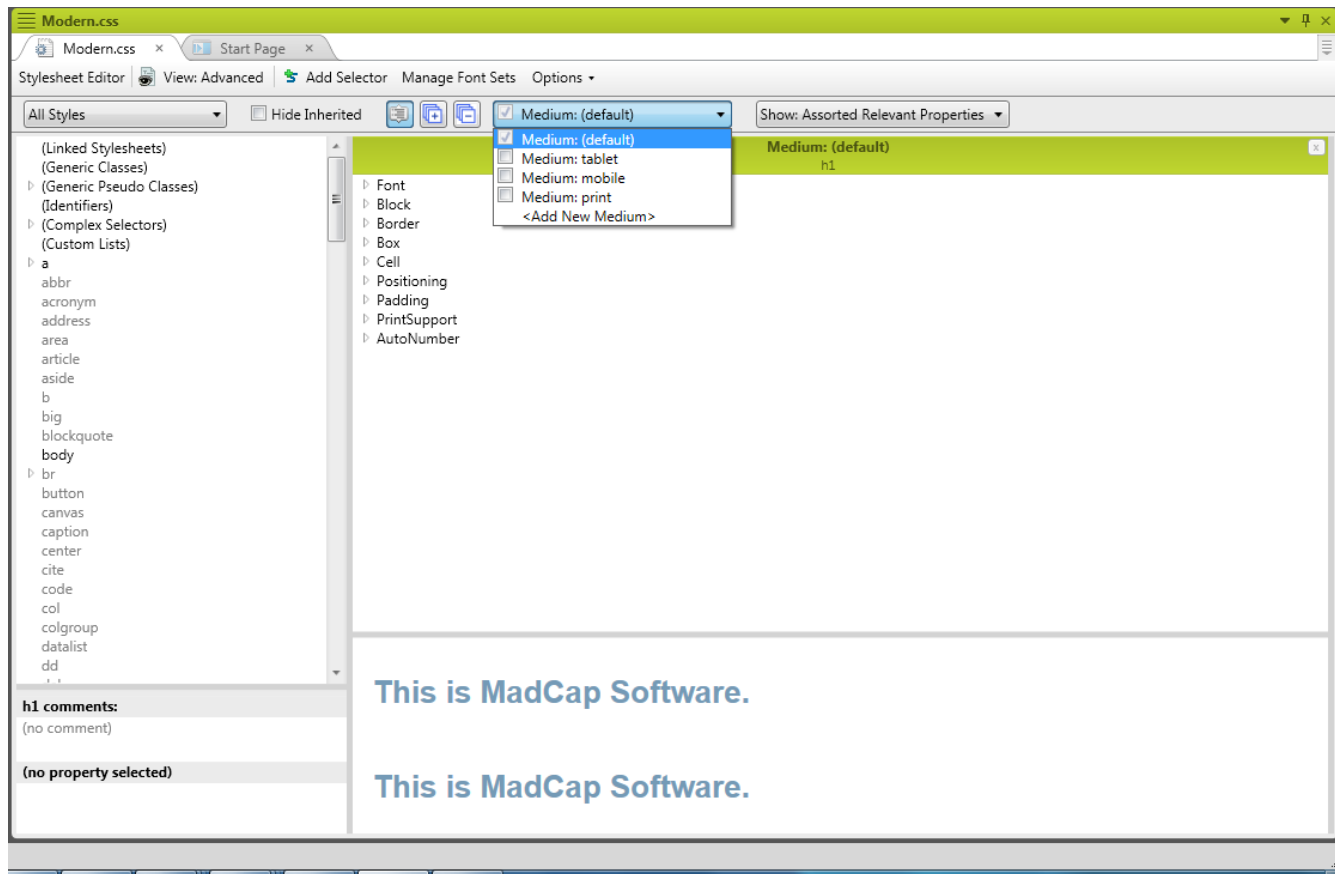
- » Eliminates hunting for a control file in 100s of topics under the (Content) root.

Create the CSS

- » To programmatically control formatting in a project and eliminate local formatting.
- » Can be based partly on the elements defined in your topic templates, if any.
- » Make the CSS the *master* to automatically apply it to all new topics – Project > Project Properties > Default tab.
 - Provides automatic consistency across projects.

Create the CSS

» An impressive/terrifying number of options.



CSS Suggestions

» At a minimum...

- After defining your CSS, don't mess with it.
 - Unless you have to...
- Aim to put all style code in the CSS, none in the topic.
- Don't change de facto standards – link settings.

CSS Suggestions (Cont'd)

- KISS and consider maintainability – !important property saga.
- Stay out of the code.
- Document it.

Create the Table CSS(s)

- » Like a regular CSS but specifically for tables.
- » Can be automatically applied to all tables in a project with a few mouse clicks.
- » Define how many table types, and thus table CSSs, you'll need – the fewer, the better.
 - Provides automatic consistency across projects.

Set Standards

» Set standards for:

- Conditional build tag usage.
- Variable and snippet usage.
- Level of single sourcing granularity.
- Graphic file formats.

Set Standards (cont'd)

- Index entries.
- Wording (can be controlled by variables or made adaptive via CSS code).
- Link types – hyperlinks vs. cross-references.
- File naming conventions.
- Anything else...

Other Steps

- » Plan to use Analyzer, if you bought it.
- » Document your project settings.
- » Ignoring the clear self-interest, get trained.
 - A class has made a lot of the mistakes for you.
- » Join a user group if there's one near you.

The Goals

- » Create controls and standards that apply across one or more projects and authors.
 - You can then focus on creating project-specific control files and content.
- » Start your Flare work under control and keep it there.

Hyper/Word Services Offers...

Training // Consulting // Development

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ViziApps Mobile Apps // Single Sourcing

Structured Authoring



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Thank you... Questions?



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