



LIVE WEBINAR



# Navigation 101: A Guide to Links in MadCap Flare



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## PRESENTED BY:

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Hyper/Word Services



## BEFORE WE GET STARTED...



The webinar will be recorded  
and emailed to all registrants



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throughout the webinar

# Who Am I?

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- Neil Perlin - Hyper/Word Services.
  - Internationally recognized content consultant.
  - Help clients create effective, efficient, flexible content in anything from hard-copy to mobile.
  - Certified – Flare, Mimic, Viziapps, others.
  - Working in online since 1986, mobile since 1998, XML and CSS since 1999, apps since 2011.
  - Certified app development consultant and trainer.
  - **Lynda.com**<sup>®</sup> author of training for Flare 12, others.

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- ◆ Flare's link types
  - ◆ Insertion and customization
  - ◆ Pros and cons
  - ◆ Some general design notes

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# Hyperlinks



# Hyperlinks

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Topic A

**Topic A**

Here's a standard [hyperlink to topic B](#).

Here's a cross-reference (xref) to [Topic B](#).

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Topic A

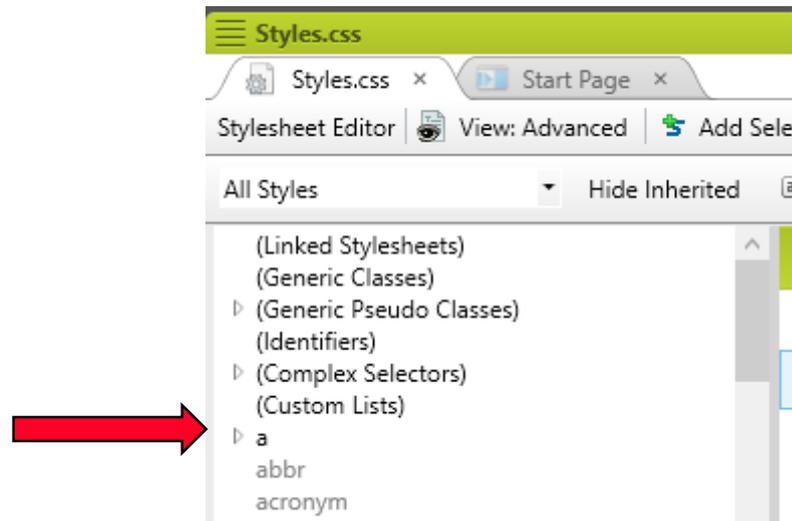
**Topic B**

Welcome to topic B.

# Insertion and Customization

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- ◆ Insert – Use Insert > Hyperlink, or press Ctrl/K, or click Insert Hyperlink icon on toolbar.
- ◆ Customize – Use “a” in the CSS.



# Pros and Cons

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## ◆ Pros:

- Can link from anything to anything.
- Familiar.

## ◆ Cons:

- Takes readers out of their reading path.
- A maintenance problem if the target's title changes.
- Author must type and edit the link text.
- Link style format is fine for online targets but what happens in print targets?
- One possible answer...

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# Cross-References (xrefs)





# Cross-References (xrefs)

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- ◆ Changing the target topic title from “Topic B” to “Topic X” does *this* to the xref text.

The image shows two side-by-side panels, both titled "Topic A". The left panel is a dark grey sidebar with the text "Topic A" at the top. The right panel is a white content area with the text "Topic A" at the top. Below the title, the right panel contains several lines of text: "Here's a ~~cross-reference (xref) to Topic B.~~", "Here's a cross-reference (xref) to [Topic X](#).", "Here's a topic popup to [Topic X](#).", "Here's a [text popup](#).", "Here's an *expanding text link* .", " *Here's a dropdown link*.", and "And, finally, here's a  toggler." A red oval highlights the cross-reference text in both panels. A red arrow points from the "Topic B" text in the left panel to the "Topic X" text in the right panel, indicating the change.

# Cross-References (xrefs)

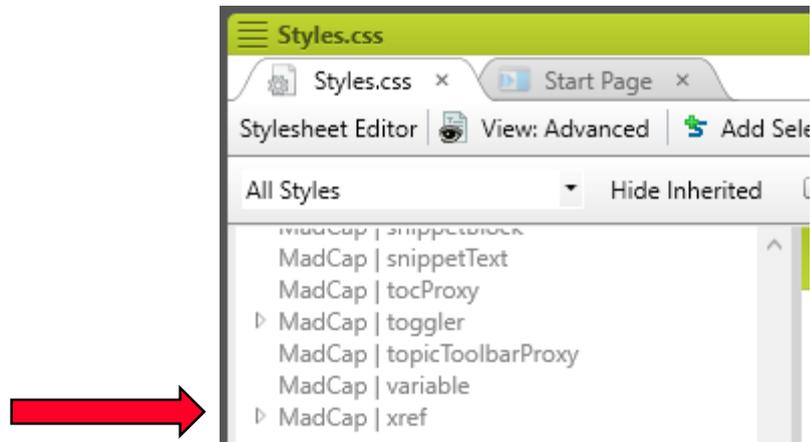
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- ◆ The update is automatic across the entire project when you build.
- ◆ Don't want to wait until you build? Select Tools > Update Cross-References.

# Insertion and Customization

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- ◆ Insert – Use Insert > Cross-Reference, or press Ctrl/Shift/R, or click Insert Cross-Reference icon on toolbar.
- ◆ Customize – Use “MadCap | xref” in the CSS.



# Pros and Cons

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## ◆ Pros:

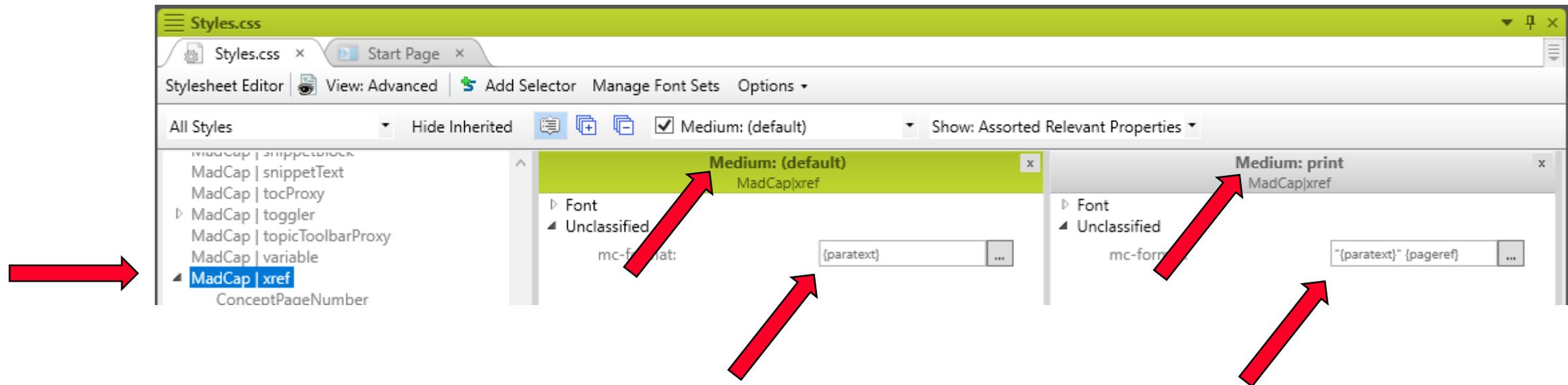
- Automatically changes the link text as the target title changes.
- Automatically changes from a link format in online targets to a page reference format in print targets.
- Works for jumps *and* popups.

## ◆ Cons:

- Can only be used between topics in the same *target* – can't be used for jumps to external URLs or files.

# Automatic Format Change

- ◆ Based on the medium.



# Setting the Format

The image shows two windows from a software application. On the left is the 'Cross-Reference Format' dialog box. It has a title bar with a checkmark icon, the text 'Cross-Reference Format', and standard window controls. Below the title bar is a section labeled 'Enter format (preview below):' with a text input field containing a vertical bar '|'. Below that is a 'Show All' button and a table of available commands. The table has two columns: 'Command' and 'Description'. The first row is highlighted in blue.

Command	Description
{b}	Start bold text
{/b}	End bold text
{bg red}	Start new background color
{/bg}	End background color
{color red}	Start new text color
{/color}	End text color
{default}	Reset all font changes

At the bottom of the dialog box, there is a note '(Double-click command to insert)', an 'OK' button, and a 'Cancel' button.

On the right is the 'Style Properties' window. The title bar shows 'Medium: (default)' and 'Show: Assorted Relevant Properties'. The main area shows a tree view with 'Font' expanded to 'Unclassified'. Under 'Unclassified', there is a property 'mc-format:' with a value of '{paratext}' and a small '...' button to its right. A red arrow points to the 'Medium: (default)' title bar, another red arrow points to the 'mc-format:' property, and a third red arrow points to the 'Cross-Reference Format' dialog box.

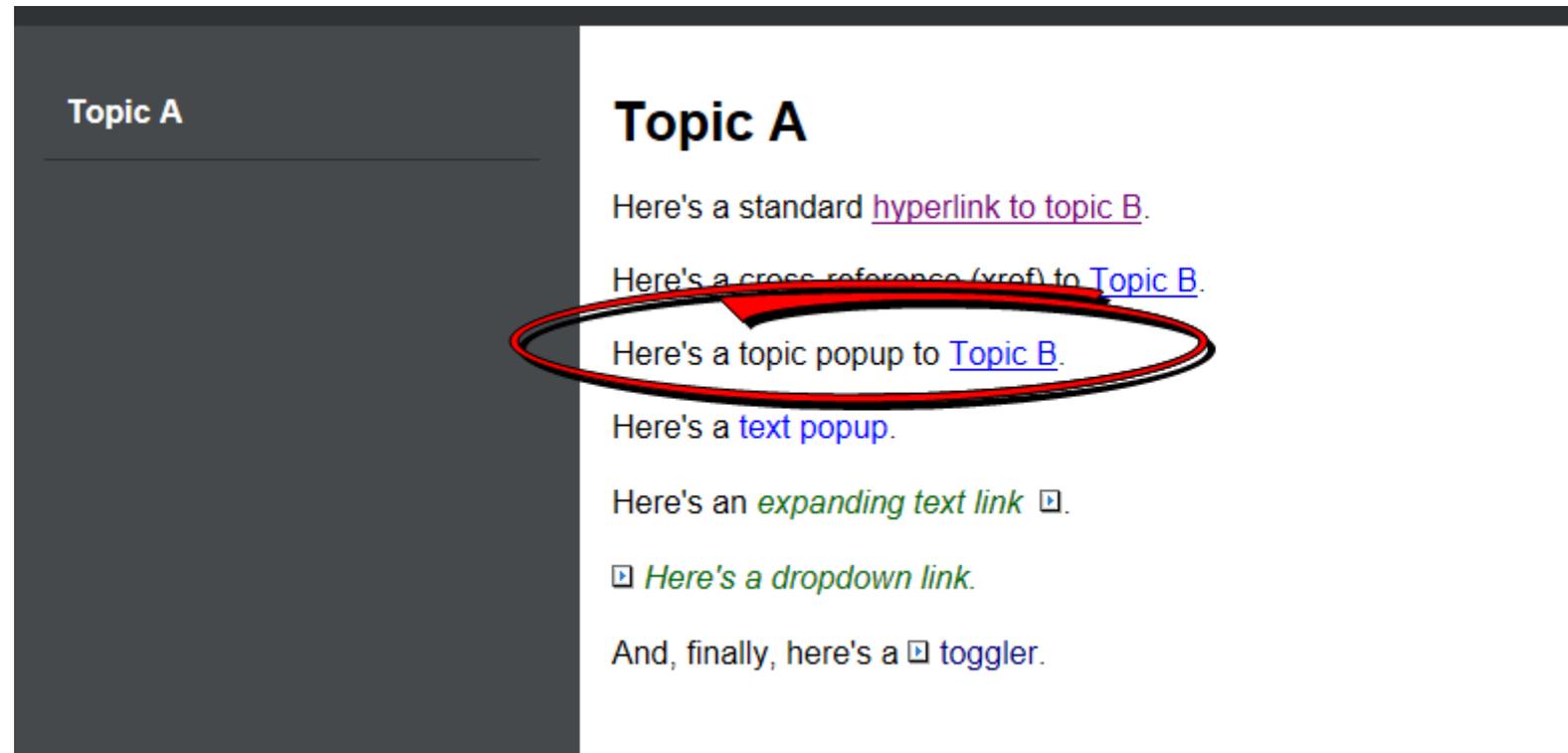
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# Popups – Topic and Text



# Topic Popups

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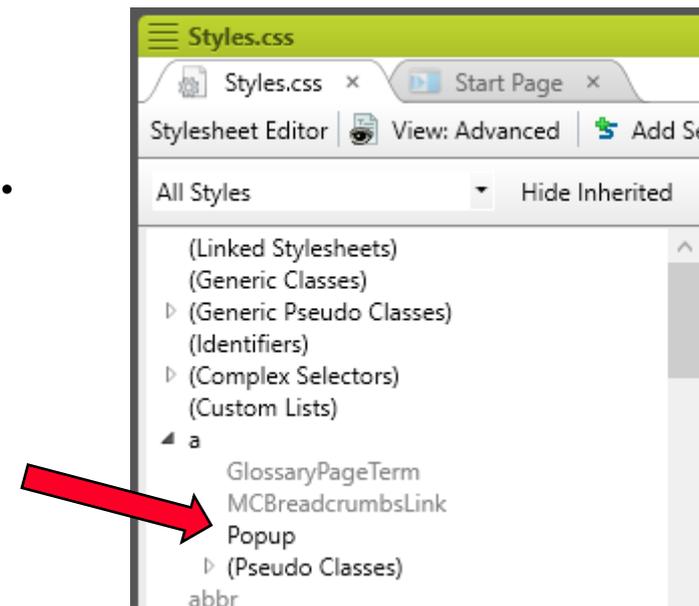
The screenshot shows a dark grey sidebar on the left with the text "Topic A" and a horizontal line below it. To the right, a white popup window titled "Topic A" contains several lines of text. The third line, "Here's a topic popup to [Topic B](#)", is circled in red. The other lines are: "Here's a standard [hyperlink to topic B](#).", "Here's a cross-reference (xref) to [Topic B](#).", "Here's a [text popup](#).", "Here's an *expanding text link* .", " *Here's a dropdown link*.", and "And, finally, here's a  toggler."

- ◆ Supported in HTML5 tripane but not yet in TopNav or SideNav – feature requested.

# Insertion and Customization

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- ◆ Insert – Use Insert > Hyperlink or Cross-Reference and select Popup Window for the Target Frame field.
- ◆ Customize – Use “Popup” sub-class of “a” in the CSS.



# Pros and Cons

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## ◆ Pros:

- Good for short pieces of content like a phone number or showing interim steps in a larger procedure without taking the reader out of the task path.
- Can automatically display a glossary term's definition in popup form when that term appears in a topic.
- Popup links in multiple topics can use one topic as the link target so maintenance is easy – make any changes in one place.

# Pros and Cons

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## ◆ Cons:

- Windows controls where a popup opens.
- A popup opens *on top of* the starting topic so it may cover content.
- New users may be unsure how to close a popup in order to keep reading in the primary topic.
- Popups in targets running on mobile devices become hyperlinks, a problem if your design is based on using popups *as* popups.

# Text Popups

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**Topic A**

Here's a standard [hyperlink to topic B](#).

Here's a cross-reference (xref) to [Topic B](#).

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link* .

**Topic A**

Here's a standard [hyperlink to topic B](#).

Here's a cross-reference (xref) to [Topic B](#).

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

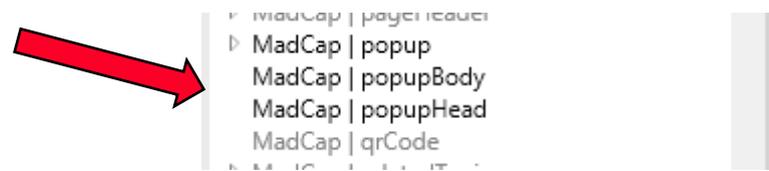
The tech support phone number is 111-555-1212.

And, finally, here's a  toggler.

# Insertion and Customization

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- ◆ Insert – Use Insert > Text Popup.
- ◆ Customize – Use “MadCap | popupHead” in the CSS for the link, “MadCap | popupBody” for the popup itself.



# Pros and Cons

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- ◆ Pros:

- Short and simple code.

- ◆ Cons:

- Opens *on top of* the link so it may cover content.
- Each text popup is a separate code instance; changing it in multiple places is a maintenance headache.
- Popups in targets displayed on mobile devices convert to hyperlinks, same design problem as before.

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# Dropdowns



# Dropdowns

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Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link* .

*Here's a dropdown link.*

And, finally, here's a  toggler.

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link* .

*Here's a dropdown link.*

And here's the body for the dropdown link.

And, finally, here's a  toggler.

# Insertion and Customization

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- ◆ Insert – Use Insert > Drop-Down Text.
  - Insert > Dropdown Hotspot creates the hotspot and adds “(This is the dropdown text)” as a placeholder for you to modify.
- ◆ Customize – Use “MadCap | dropDownHotspot” in the CSS.



# Pros and Cons

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- ◆ Pros:

- Like a popup but the body displays in a “stretched-down” area of the screen so dropdowns don’t cover other content like popups do.

- ◆ Cons:

- None I can think of but I’m open to other opinions.

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# Expanding Links (aka Slideouts)



# Expanding Links

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Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link* .

 *Here's a dropdown link.*

And here's the body for the dropdown link.

And, finally, here's a  toggler.

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link*  (where the text slides out to the right).

 *Here's a dropdown link.*

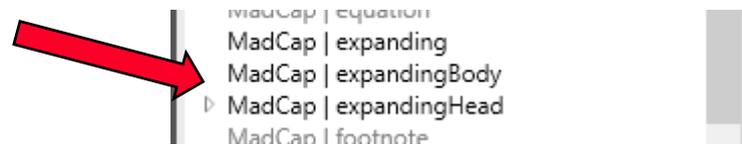
And here's the body for the dropdown link.

And, finally, here's a  toggler.

# Insertion and Customization

---

- ◆ Insert – Use Insert > Expanding Text.
  - Insert >Expanding Hotspot creates the hotspot and inserts a blank block in which to add the body.
    - » Select Show Tags > Show Markers to see it.
- ◆ Customize – use “MadCap | expandingHead” and “MadCap | expandingBody” in the CSS.



# Pros and Cons

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- ◆ Pros:

- Simple code.
- Good for short, text-only content like short glossary definitions.

- ◆ Cons:

- Text-only.
- Something about reformatting a paragraph on-the-fly seems to bother people.

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# Togglers



# Togglers

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## Topic A

Here's a standard [hyperlink to topic B](#).

Here's a cross-reference (xref) to [Topic B](#).

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link*  (where

*Here's a dropdown link.*

And here's the body for the dropdown

And, finally, here's a  toggler.

## Topic A

Here's a standard [hyperlink to topic B](#).

And here's an additional paragraph and an image that I added to demonstrate the toggler.



Here's a cross-reference (xref) to [Topic B](#).

Here's a topic popup to [Topic B](#).

Here's a [text popup](#).

Here's an *expanding text link*  (where the text slides out to the right).

*Here's a dropdown link.*

And here's the body for the dropdown link.

And, finally, here's a  toggler.

Steps

1. Do this.
2. Do that.
3. Do the other thing.

# Insertion and Customization

---

- ◆ Insert – Use Insert > Toggler.
- ◆ Customize – Use “MadCap | toggler” in the CSS.



# Pros and Cons

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- ◆ Pros:

- Like a dropdown but can show or hide any content anywhere and at the reader's discretion.

- ◆ Cons:

- Requires multiple steps – creating the content, naming the content to be togglerized, creating the toggler, and assigning the content to the toggler.

# Some General Design Notes

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- ◆ Hyperlinks and xrefs are good to link to related content but bad if the link is in the middle of a procedure – easy for readers to lose their place.
  - Use popups, dropdowns, or togglers instead.
- ◆ Need to run targets on mobile devices? Popups convert to hyperlinks.
- ◆ Importing old Word or FrameMaker documents into Flare? Get rid of underlining used for text emphasis.
  - Readers will think they're links.

# Some General Design Notes

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- ◆ Single-sourcing to online and print targets? Use xrefs, not hyperlinks, to get the page reference format in the print.
- ◆ Think twice before customizing your link styles away from what people are familiar with.
  - From OWL Guide to WinHelp to HTML Help.
- ◆ Where to place links in a topic – top, bottom, or in-context?

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- ◆ In other words, lots of link options beyond standard hyperlinks and popups.

# Hyper/Word Services Offers...

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Training • Consulting • Development

- Flare and MadCap Suite
- Assessing readiness for “mobile”
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# Thank you... Questions?



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