

# Taking Snippets to the Next Level: Snippet Conditions and Variables

Presented by Paul Pehrson, DocGuy Training

# Agenda

- General Introduction
- Intro to Conditions, Variables, and Snippets
- Snippet Conditions Explained
- Snippet Variables Explained
- Conclusion
- Q&A



# Hi, I'm Paul Pehrson

- Flare User for 11+ years
- Flare trainer and consultant for 9 years
- Technical writer since 2000
- Dad of 5 (yes, 5)

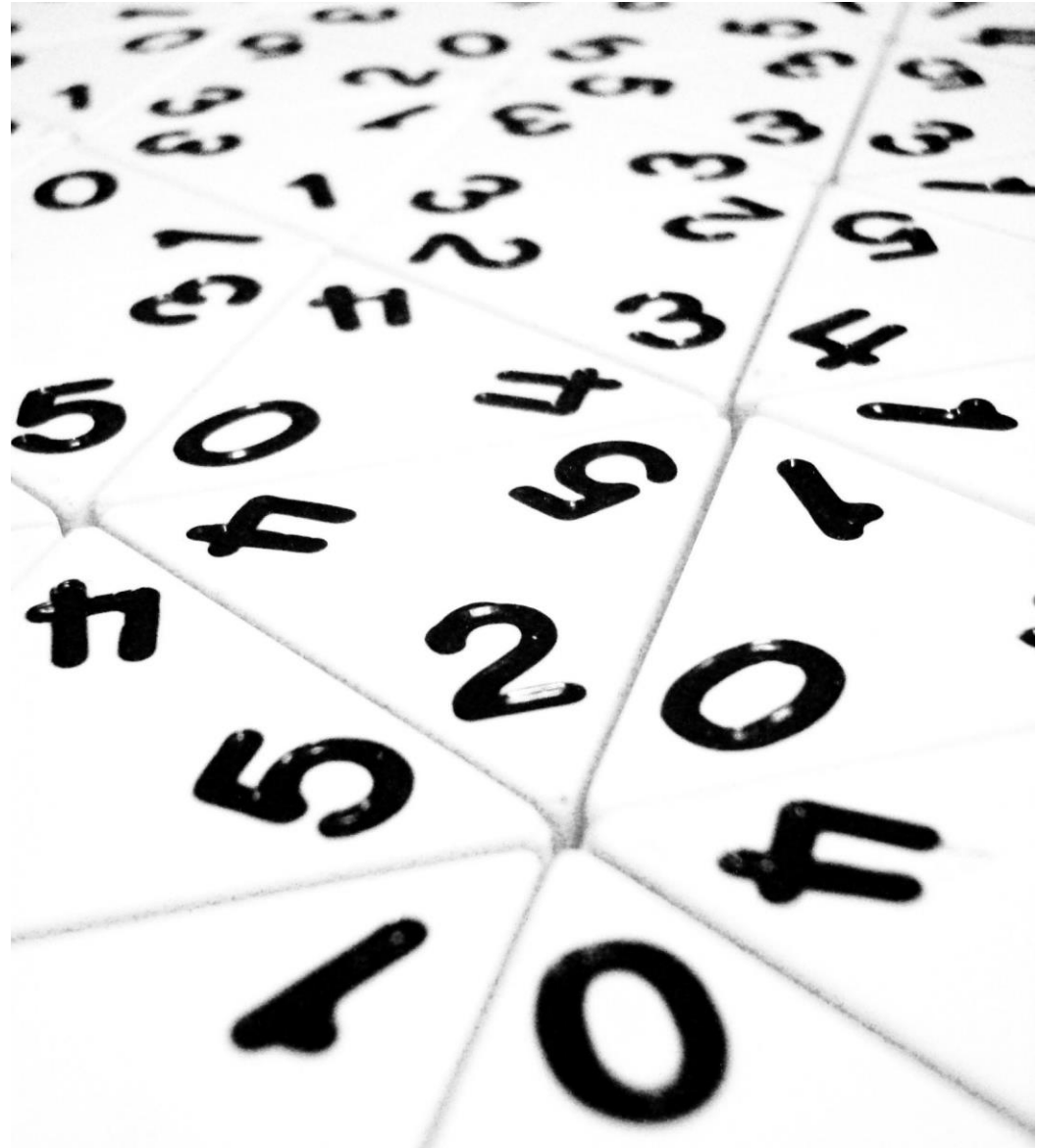


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# Brief Overview of Conditions, Variables & Snippets

- What are conditions?
  - Pro vs free software
  - Online vs print help
- What are variables?
  - Software version numbers
  - Product and company names
  - Book titles
- What are snippets?
  - Reusable chunks of content
  - Can contain formatting, images, tables, etc.

Demo of  
conditions,  
variables,  
and snippets





# Snippet Conditions

For those times when you have an  
'almost exactly the same'



## Topic 1

### Certificate Workflows overview

#### What are Trust Protection Platform workflows?

Application Workflows are defined in workflow objects, but applied using folders. Workflows and folders are created and managed in the Policy (Folder) tree. In the Policy tree hierarchy, workflow objects are created under their corresponding folders.

#### What can I do with workflows?

Workflows allow you to require approvals or run SSH commands at stages of the certificate lifecycle. You can apply workflows globally, or limit their action to only certificates associated with a specific application type such as a GSK keystore or Apache web server.

#### What prerequisites need to be met for approvals to work?

You need to make sure that you have enabled notifications in the system. If you have already enabled notifications for certificate or SSH work, you don't need to do this again, as this is a system-wide setting.

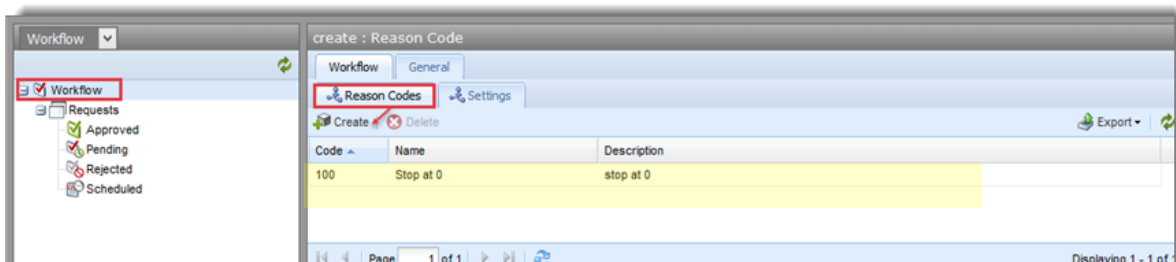
For details about enabling notifications, see [Setting up notifications and logging](#).

#### Where do Approval Reason Codes fit in?

When a workflow triggers an Approval Request, the approver receives a notification that includes the workflow's associated Reason Code. The Reason Code provides instructions or information for the workflow approvers.

Although Approval Reason Codes are selected in a Workflow in the Policy tree, the Reason Codes themselves are defined in the Workflow tree. You define the Approval Reason Codes that you want to reference in Workflow objects. The maximum Approval Reason Code value is 999.

For more information, see [Defining reason codes for certificate approvals](#).



About certificate workflows

#### Certificate Workflows overview

Workflow objects and life cycle management

Creating a certificate workflow

Workflow Object Settings

Defining reason codes for certificate approvals

Applying or blocking application workflows

## Topic 2

### SSH Key Workflows overview

#### What are Trust Protection Platform workflows?

Application Workflows are defined in workflow objects, but applied using folders. Workflows and folders are created and managed in the Policy (Folder) tree. In the Policy tree hierarchy, workflow objects are created under their corresponding folders.

#### What can I do with workflows?

Workflows allow you to require approvals at stages of the ssh key lifecycle.

#### What prerequisites need to be met for approvals to work?

You need to make sure that you have enabled notifications in the system. If you have already enabled notifications for certificate or SSH work, you don't need to do this again, as this is a system-wide setting.

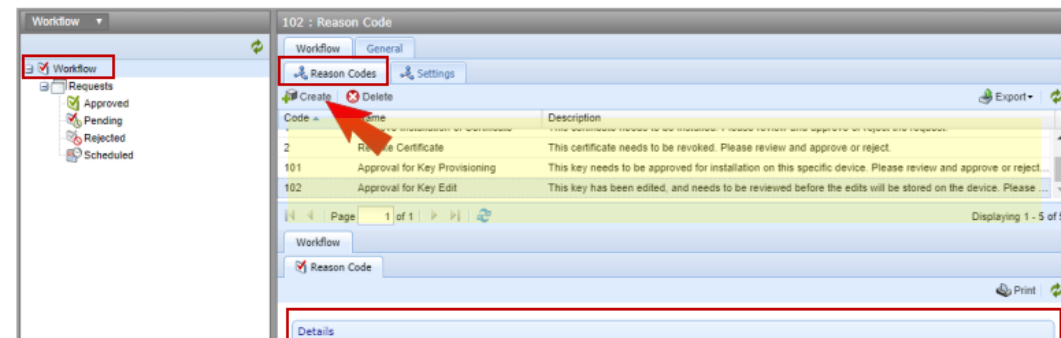
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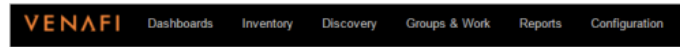
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For more information, see [Defining reason codes for SSH approvals](#).



## To create a custom report

1. From the Aperture menu bar, click **Reports > Custom Reports**.



2. Click **Add Report**

3. In the **Create New Report** wizard, choose a Data type.

4. Use Filters to help narrow your data set.

### **FILTER CATEGORIES FOR AGENTS**

- Agent Properties. This group gives you a list of properties related to the individual agents, including client type, client version, group, username, etc.
- Last Seen. This group allows you to filter the agents list based on when the agent was last seen, or dynamically based on how long it has been since the agent was seen.
- Operating System. This group allows you to filter the agents list based on metadata related to the operating system on which the agent is installed.
- Hardware and Network. This group allows you to filter the agents list based on hardware details for the machine on which the agent is installed including things like MAC address, IP address, domain, system manufacturer, etc.

### **FILTER CATEGORIES FOR CERTIFICATES**

- Quick Filters. These are pre-defined filters that are commonly used.
- Common Filters. This group allows you to quickly filter by status, risk, certificate name, or folder location.
- Certificate Properties. This group gives you a comprehensive list of certificate properties, giving you the ability to target the precise record you are looking for.
- Discovery. This group allows you to filter certificates by their discovery meta data, including inventory date and creation date.

**Example** If you only want to include self-signed certificate data in your report, then in the **Issuer** field of the **Certificate Properties** group, begin typing *Self Signed*, and then press Enter when *Self Signed* appears.

### **FILTER CATEGORIES FOR SSH KEYS**

- Common Filters. This group allows you to quickly filter by status, risk, certificate name, or folder location.
- Properties. This group allows you to filter the list on SSH properties like algorithm, key length, trusts, etc.



## FILTER CATEGORIES FOR AGENTS CERTIFICATES SSH KEYS

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t-reports-customized-creating-tpp.htm

ui-filter\_categories.flisnp

c-Workflow-overview\_notyettagged.flisnp

webinar-links.htm

ByProduct

Default

c-WorkflowsOverview.flisnp

Layout (Web)Medium (default)Page Layout

MadCap:conceptMadCap:keyword

MadCap:snipped:Block

MadCap:snipped:Block

MadCap:snipped:Block

cd

ii

P

ing

0150100150200250300350400450500550600650700750800850900950100010501100115012001250

500550600650700750800850900950100010501100115012001250

4. Use Filters to help narrow your data set.

FILTER CATEGORIES FOR AGENTS

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5. (Optional) If you want to add, delete, reorder, or sort the report's columns, click **Edit Columns**.

Create New Report

Data

Delivery

Schedule

Name

Data

Words: 214Font Scale:110%

# Snippet Variables

For when the variable changes, not at the target (or audience) level, but at the topic, or insertion level.

Don't worry. Most people say it's easier than algebra...

$$x = \frac{-b \pm \sqrt{b^2 - 4ac}}{2a}$$

# Variable definitions priority

Type	Where it is set	Priority	Examples
Project	Project Organizer > Variable Set editor	Lowest priority	Company Name Product Name

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Project	Project Organizer > Variable Set editor	Lowest priority	Company Name Product Name
Target	Project Organizer > Targets > individual target file > Variables tab	Override project settings	Client Name Book title Product Name (if multiple products in same Flare project)



# Variable definitions priority

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Project	Project Organizer > Variable Set editor	Lowest priority	Company Name Product Name
Target	Project Organizer > Targets > individual target file > Variables tab	Override project settings	Client Name Book title Product Name (if multiple products in same Flare project)
Snippet	Individual topic > Right click on snippet > Snippet Variables	Highest priority; override target and project settings	When lots of potential options might exist, like a price list

And now for  
a message  
from our  
host...

```
[~]$ host
```

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November 14-15, 2017 (web-based)

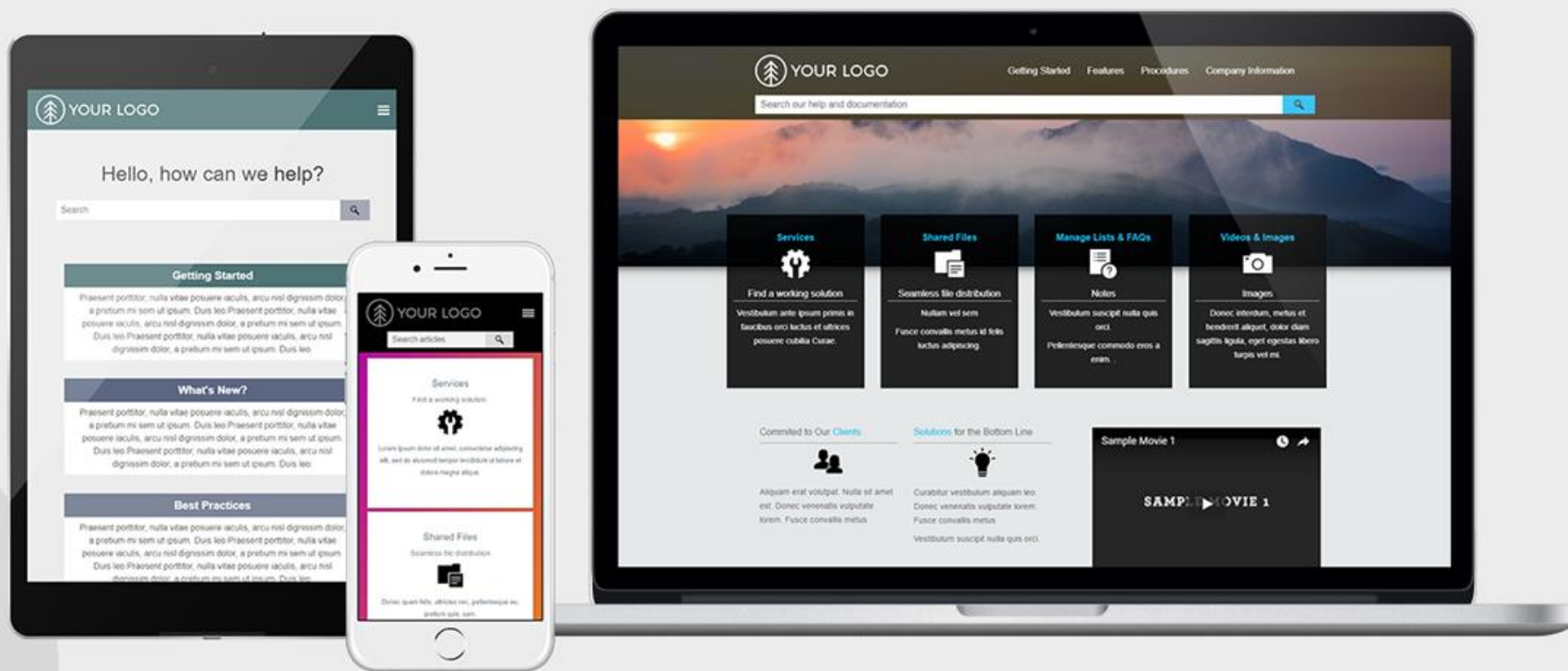
### **MadCap Flare Single Sourcing Training**

November 16-17, 2017 (web-based)

For more details, contact [sales@madcapsoftware.com](mailto:sales@madcapsoftware.com)

*Note: Courses subject to change. Availability based on student registration. Certain restrictions apply; cannot be combined with any other offer or promotion. Not valid on courses already purchased.*

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# Q&A



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