



LIVE WEBINAR

# Single-Sourcing With MadCap Flare – A Speed Review



Presented By:

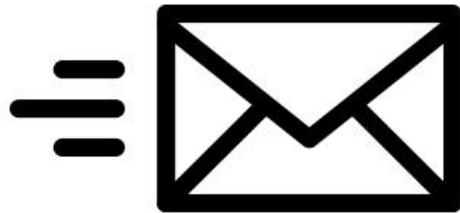
**Neil Perlin**

Hyper/Word Services





## Before We Get Started...



The webinar will be recorded  
and emailed to all registrants



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# 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, others.**

# What is Single-Sourcing?

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- ◆ **One source of content for multiple targets.**
  - **Need a sales manual in online and print form?**
  - **You *can* create one project for each format but...**
  - **You have to write the content twice.**
  - **You have to make any changes twice.**
    - » **If you remember to...**

# The Single-Sourcing “Fix”

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- ◆ **Create one source of content to use in full or in part for each output.**
- ◆ **Create re-usable chunks of content and share them in different outputs.**
- ◆ **The basic concepts are that simple.**
- ◆ **But there’s a lot more in the details...**

# Flare and Single-Sourcing

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- ◆ **Flare is a single-sourcing powerhouse.**
- ◆ **But the options can be overwhelming.**
- ◆ **And some options aren't entirely obvious.**
- ◆ **That's the point of this presentation.**

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# Flare's Single-Sourcing Features



# Conditions

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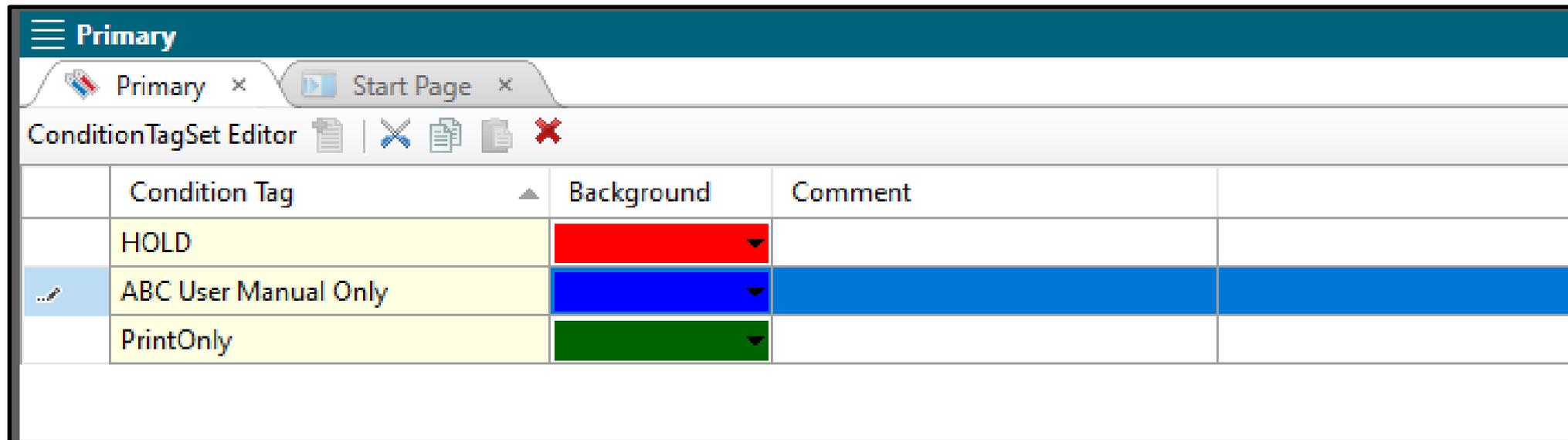
## ◆ Let us categorize content

- Consider that sales manual for the US and Canada.
- Content applies to the US, Canada, or to both.
- Conditions let us define “US” and “Canada” categories.
  - » Content common to all audiences is always used, so it doesn't have to be put in a category.

# Conditions

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- ◆ Create and assign using the Condition Tag Set Editor.

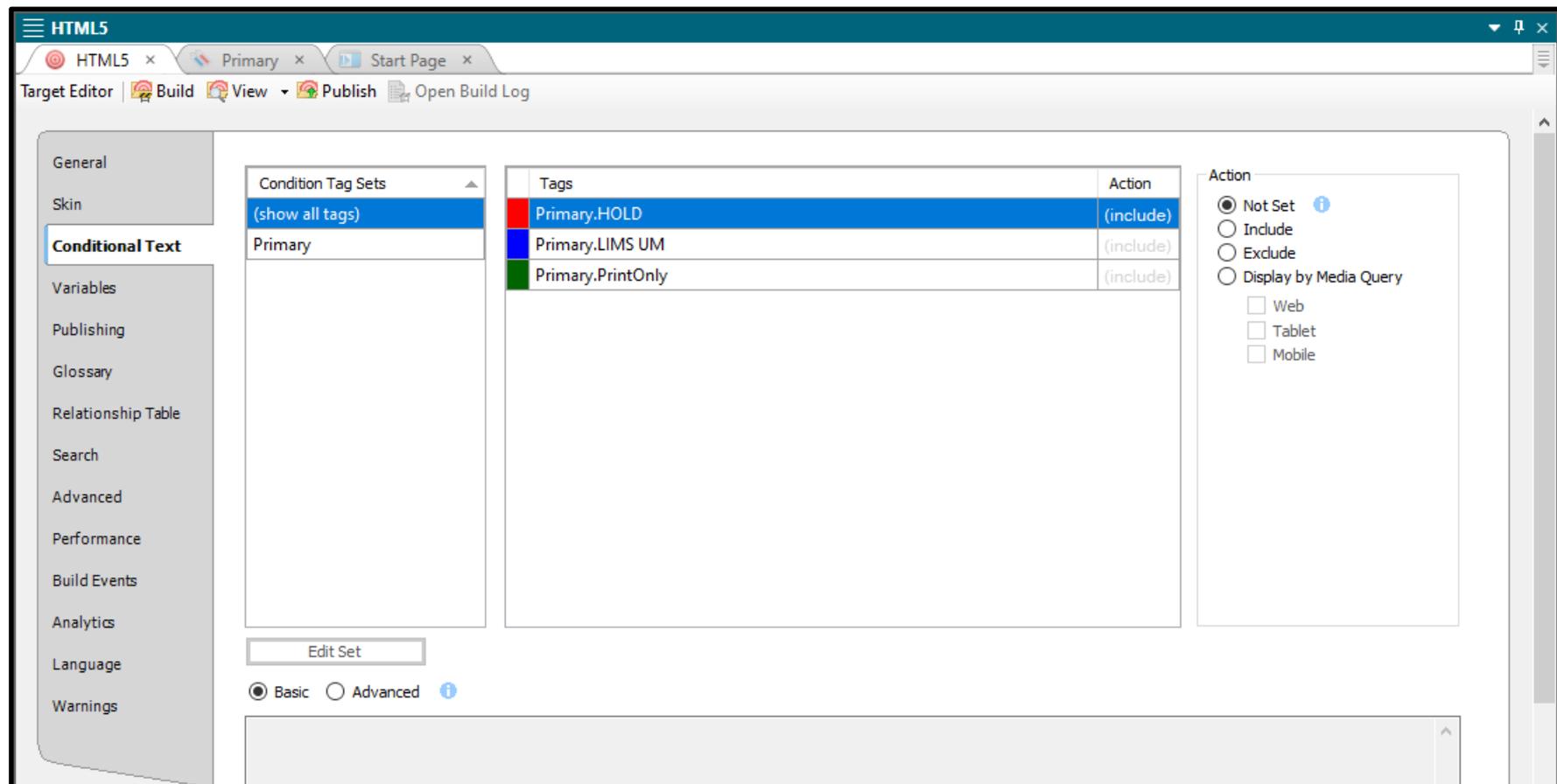


The screenshot shows a software interface titled "Primary" with a menu icon. Below the title bar, there are two tabs: "Primary" and "Start Page". The main area is titled "ConditionTagSet Editor" and contains a table with the following data:

	Condition Tag	Background	Comment
	HOLD	Red	
	ABC User Manual Only	Blue	
	PrintOnly	Green	

# Conditions

- ◆ Apply to a target using the **Conditional Text** tab on the **Target Editor**.



# Conditions...Be Aware

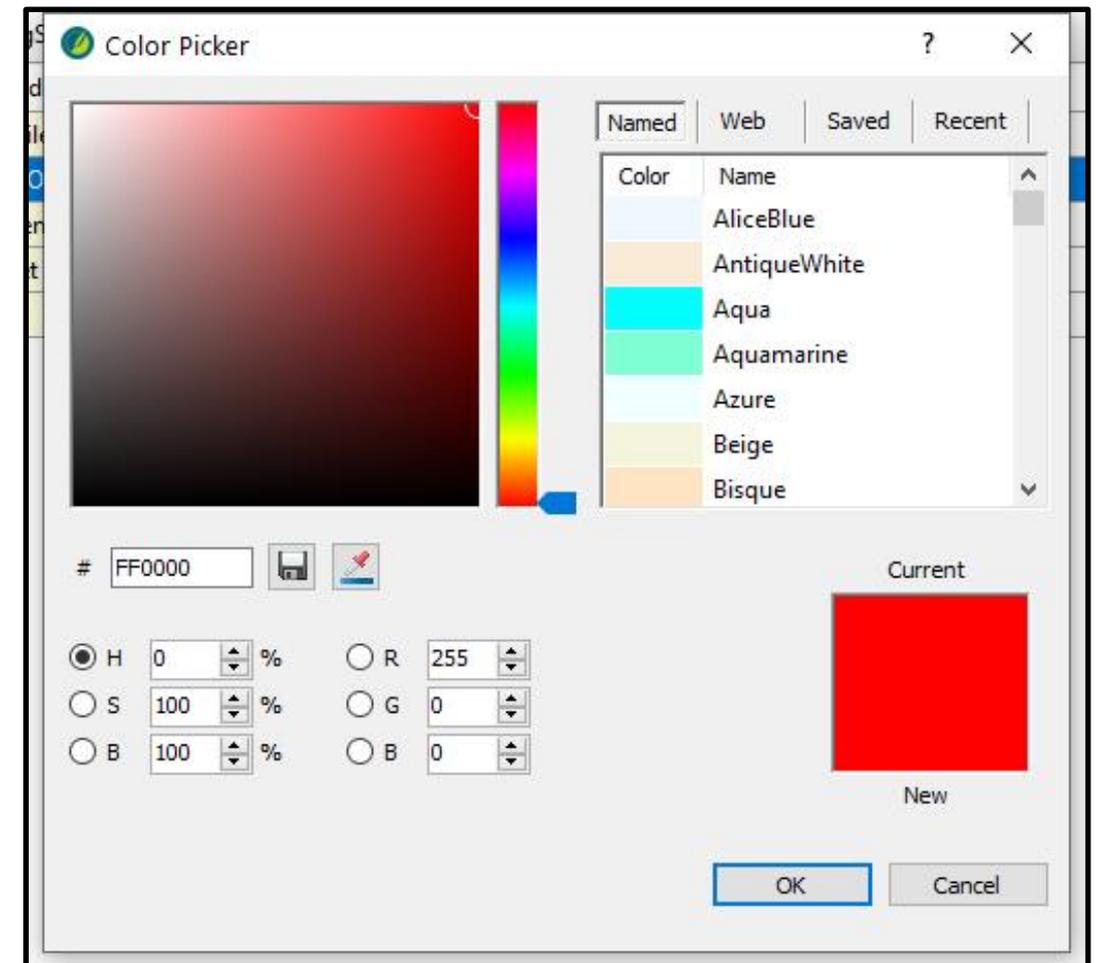
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- ◆ **Conditions are a snap to create.**
- ◆ **... and apply.**
- ◆ **... and use when generating a target.**
- ◆ **So what's the problem?**
- ◆ **It's easy to create and use conditions without clearly defining what we're doing.**
- ◆ **Or documenting it for the next author.**

# Conditions...Be Aware

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- ◆ **Also be aware of color selection issues when creating new conditions.**
- ◆ **Use of hard-to-distinguish colors when creating multiple conditions.**
- ◆ **Use of colors that are hard to see by authors who are color-blind.**



# “Placeholders”

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- ◆ **Let us easily repeat content.**
  - **Consider an app whose pre-release code name is “ABC”.**
  - **So you write “ABC” 100s of times.**
  - **Then marketing changes the name to “XYZ”.**
  - **What do to?**
  - **Change all instances of “ABC” to “XYZ”.**
  - **But search and replace won’t help if you misspelled “ABC”. Placeholder time!**

# Variable Placeholder

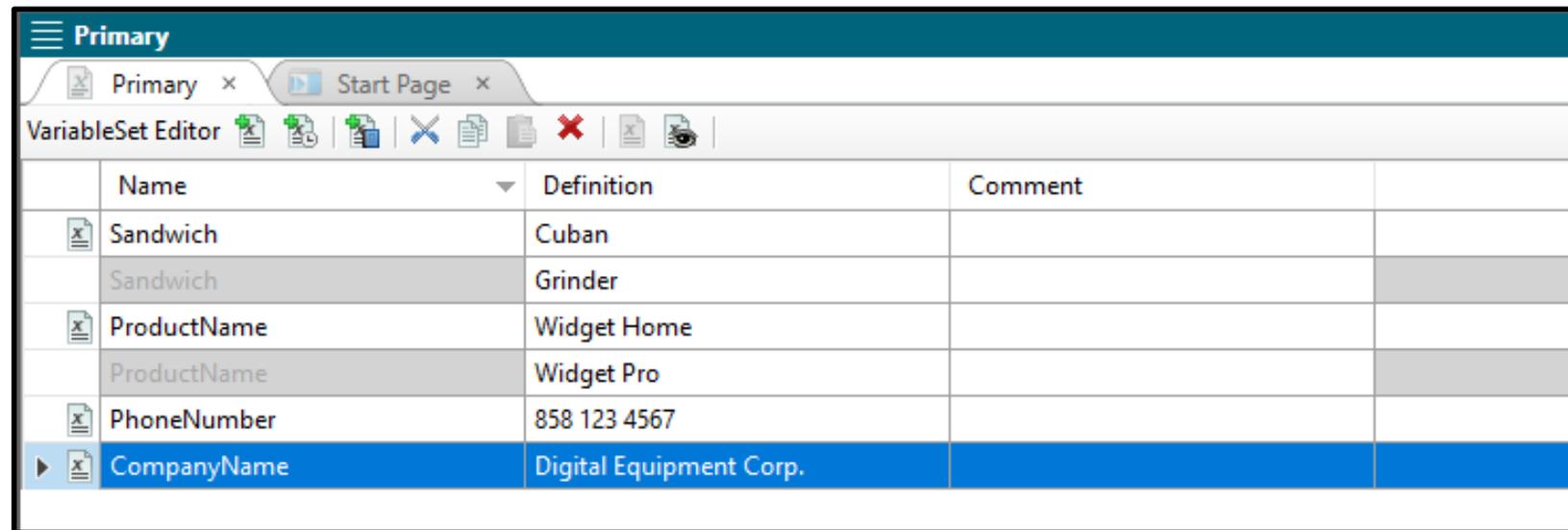
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- ◆ **Variables – text-only, take on the format of the paragraph into which inserted.**
  - **Add a variable called prodname with value=ABC.**
  - **Then insert the variable – what seems to be the word “ABC” appears in the text.**
  - **If the name changes, change the variable value – Flare automatically changes the text wherever you inserted the variable.**
  - **Can be conditionalized in groups.**

# Variable Placeholder

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## ◆ In the Variable Set Editor.



The screenshot shows the Variable Set Editor interface. At the top, there are tabs for 'Primary' and 'Start Page'. Below the tabs is a toolbar with various icons. The main area contains a table with the following data:

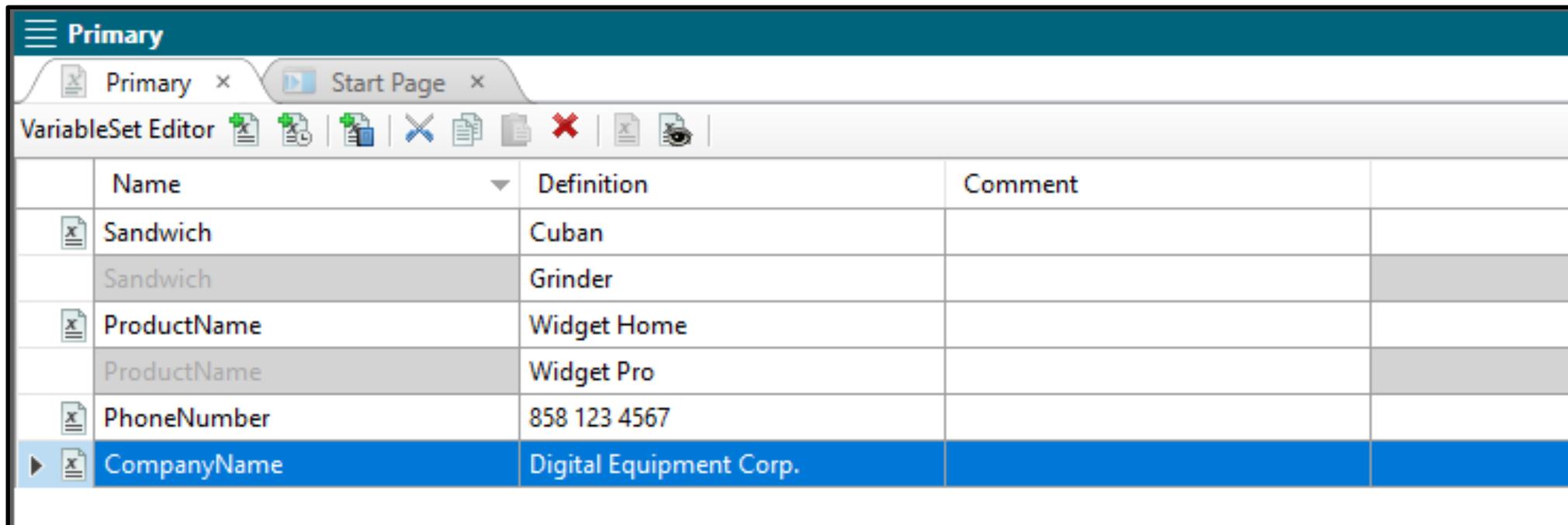
Name	Definition	Comment
Sandwich	Cuban	
Sandwich	Grinder	
ProductName	Widget Home	
ProductName	Widget Pro	
PhoneNumber	858 123 4567	
CompanyName	Digital Equipment Corp.	

## ◆ Don't assume that a variable makes sense – use that Comment field.

# Variable Placeholder

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- ◆ You can define multiple values for a variable in the Variable Set Editor.
- ◆ Like the Sandwich and ProductName variables below.



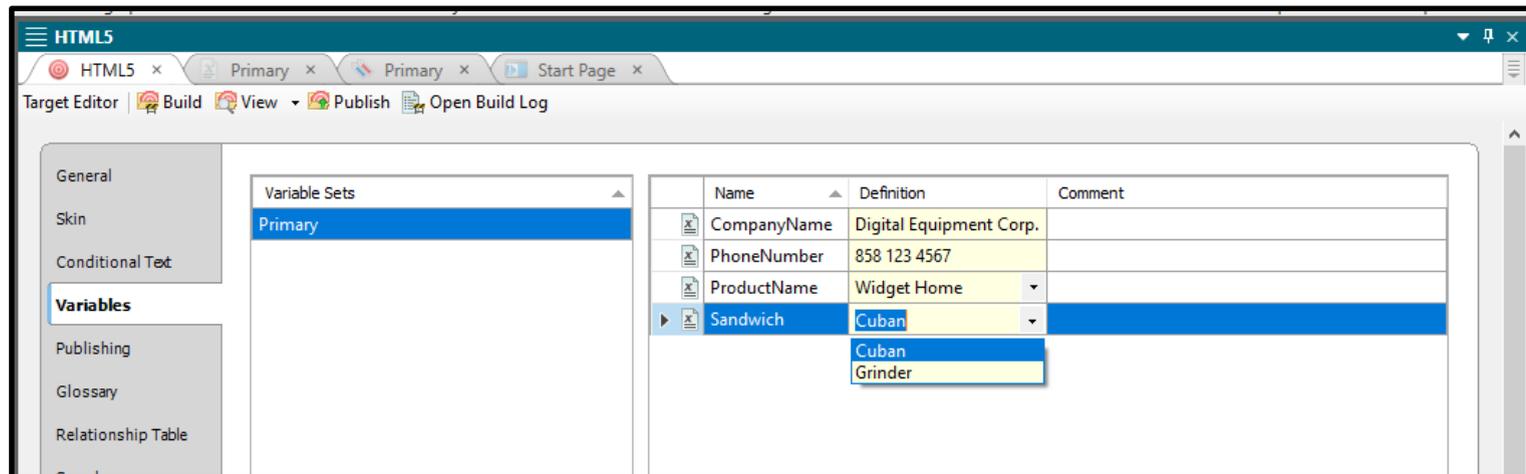
The screenshot shows the VariableSet Editor interface. At the top, there is a header bar with a hamburger menu icon and the text "Primary". Below this, there are two tabs: "Primary" and "Start Page". The main area contains a table with the following data:

Name	Definition	Comment
Sandwich	Cuban	
Sandwich	Grinder	
ProductName	Widget Home	
ProductName	Widget Pro	
PhoneNumber	858 123 4567	
CompanyName	Digital Equipment Corp.	

# Variable Placeholder

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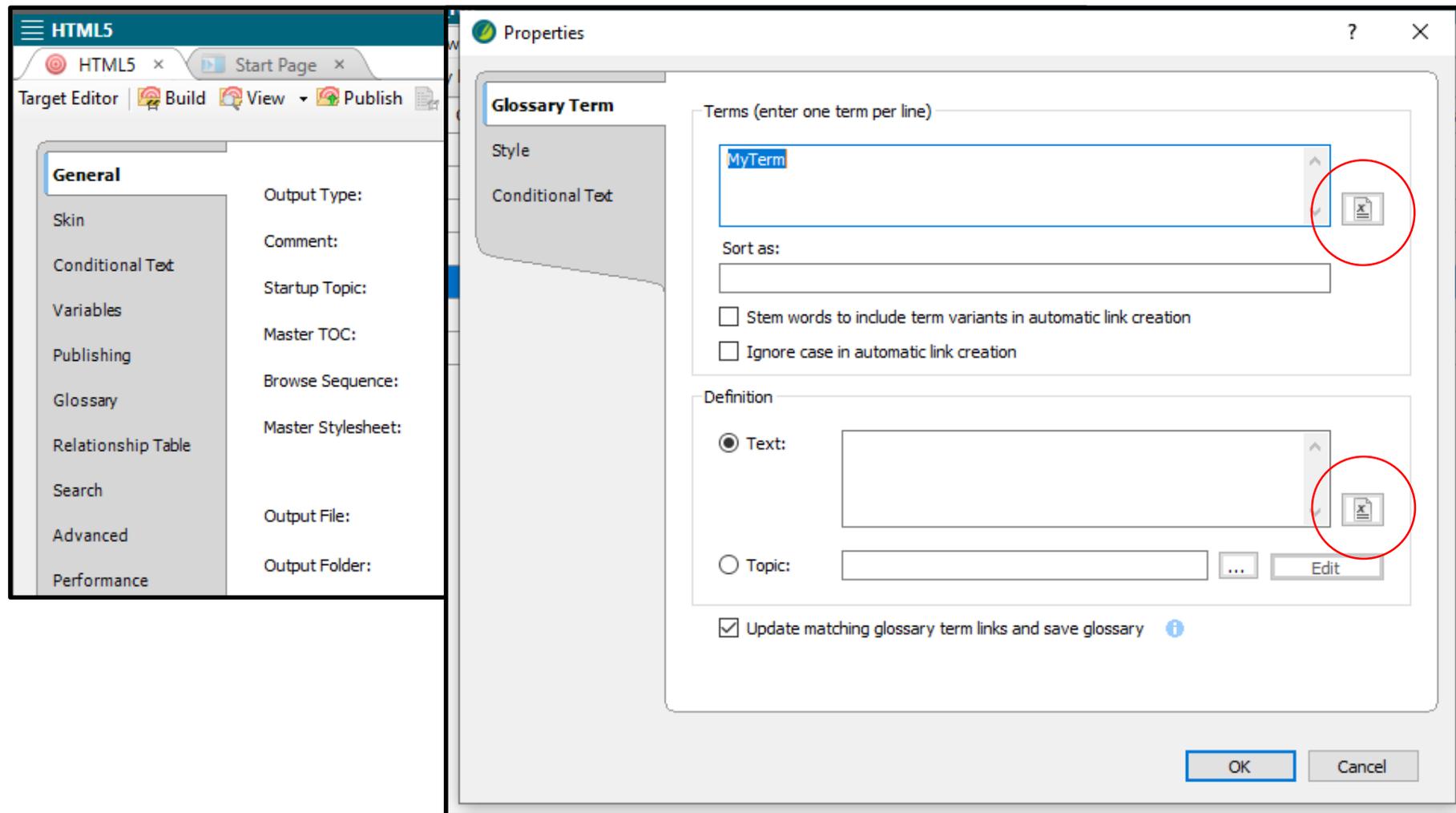
- ◆ **If you do this, where do you tell Flare which variable value to use for a given target?**
- ◆ **On the Variables tab of the Target Editor.**



- ◆ **Note that, in edit mode, Flare will always use the first variable value you defined.**

# Variable Placeholder

- ◆ Also used in many places in Flare, such as:



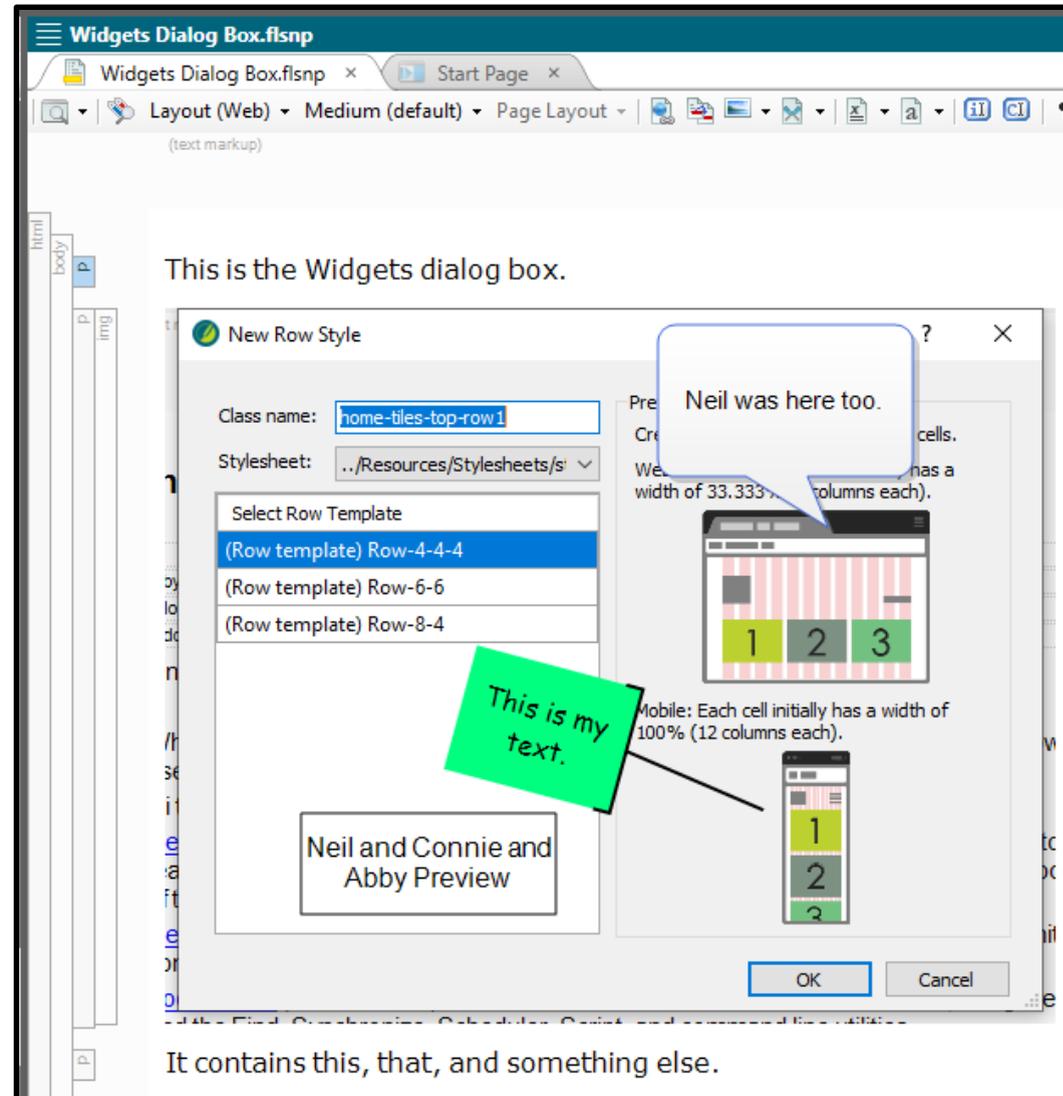
# Snippet Placeholder

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- ◆ **Conceptually similar to variables but can contain anything you'd insert in a topic.**
- ◆ **Including variables.**
- ◆ **Can be conditionalized individually.**

# Snippet Placeholder

- ◆ In the Snippet Editor.



# Placeholders – Be Aware...

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- ◆ **Easy to create duplicate placeholders unless we clearly define what we're doing.**
- ◆ **And document it for the next author.**
- ◆ **Ability to insert variables all over a project can lead to chaos if not managed carefully.**

# Flare Import File

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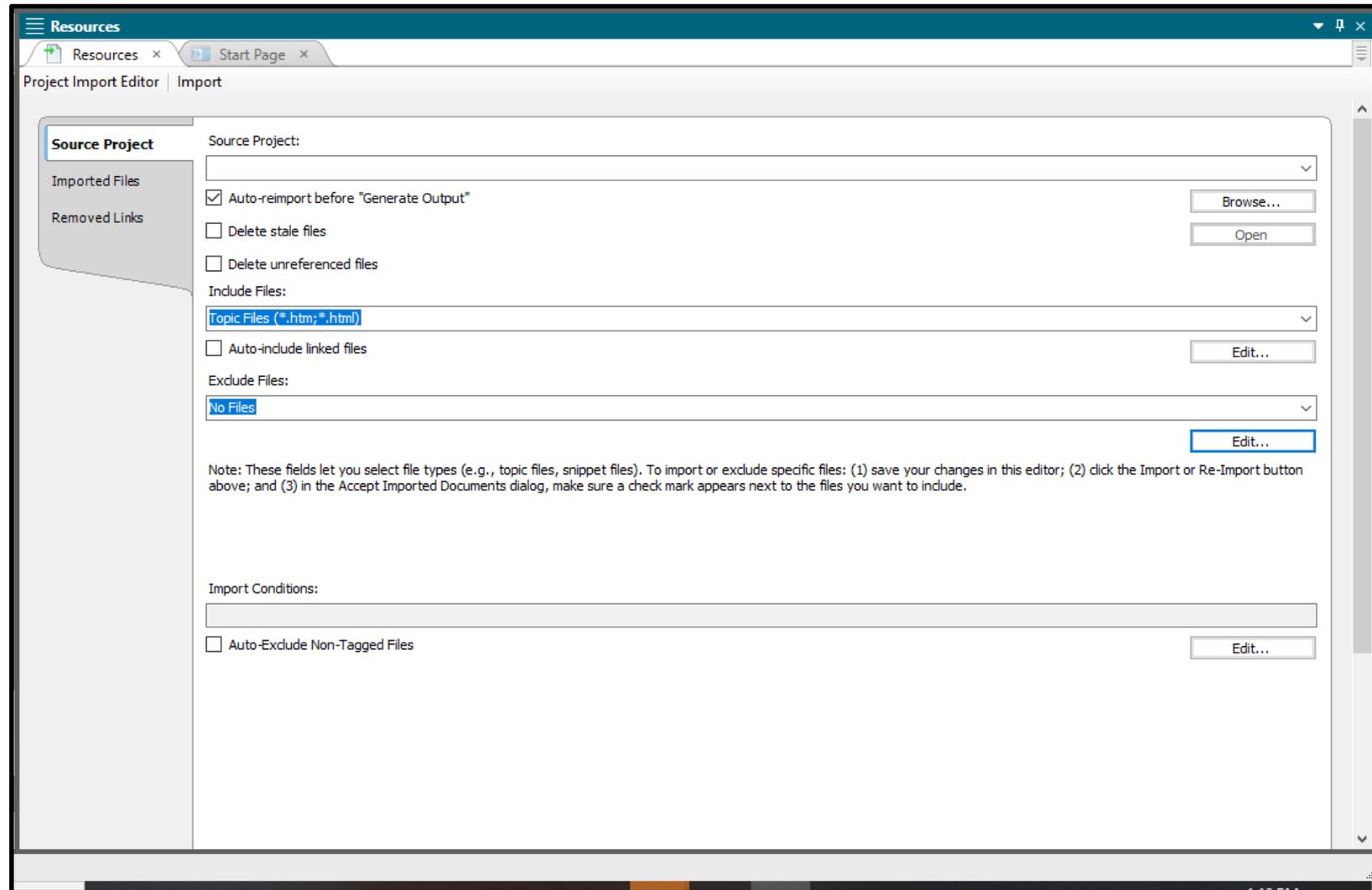
- ◆ Lets us share content and control files across *multiple* projects.
- ◆ Designate one project as the master and put the shared files in it.
- ◆ Then create a child project and specify that it downloads and uses content and control files *from the master*.

# Flare Import File

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- ◆ **A child project remains linked to the master.**
- ◆ **If a shared file differs between the master and child, because either project's author changed it, Flare automatically downloads a new copy of that file when the child project output is built.**
- ◆ **This overwrites the version in the child project and ensures consistency.**

# Flare Import File



# Flare Import File - Be Aware...

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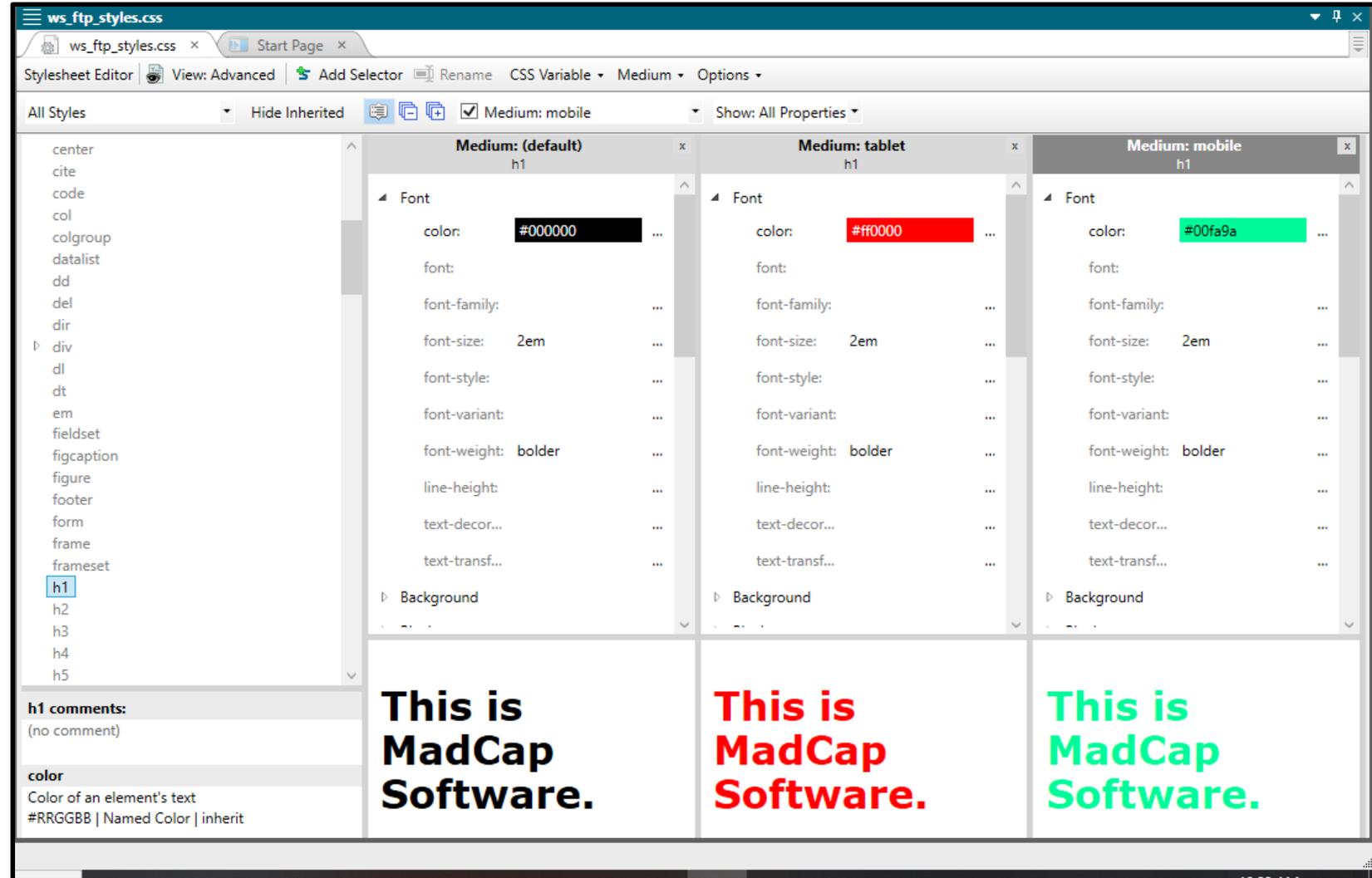
- ◆ Can be confusing if not implemented clearly.
- ◆ *Very likely to be* confusing if not documented.

# Conditionalized Styles

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- ◆ **Most projects use one CSS but...**
  - **You can create two CSSs for a project and use CSS A for online targets and B for print.**
  - **Better, create one CSS and use the mediums feature for stylistic variations in the targets.**
  - **Or, create one CSS and use mc-conditions in the Stylesheet Editor to turn a given style on or off for a given target.**

# Mediums Feature



# MC Conditions Feature

The screenshot shows a web browser window with a Stylesheet Editor. The editor is displaying the 'ws\_ftp\_styles.css' file. The 'View: Advanced' tab is active. The 'All Styles' list on the left shows the 'h1' element selected. The 'Medium: (default)' media query is selected, and the 'h1' element is highlighted. The 'Condition Tags' dialog box is open, showing the 'Condition Tag Sets' list with 'Primary' selected. The 'Condition Tags' table has three rows: 'ABC User Manual Only', 'HOLD', and 'PrintOnly'. Each row has a checkbox in the 'Comment' column. The 'ABC User Manual Only' checkbox is checked. The dialog box also has 'Edit Set', 'Unselect All', 'Select All', 'OK', and 'Cancel' buttons.

Condition Tag Sets	Condition Tags	Comment
Primary	ABC User Manual Only	<input checked="" type="checkbox"/>
	HOLD	<input type="checkbox"/>
	PrintOnly	<input type="checkbox"/>

# Conditionalized Styles – Be Aware...

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- ◆ **Programmatic elegance increases as we go down the list.**
- ◆ **But mindshare familiarity decreases.**
- ◆ **Document all use of mediums or mc-conditions.**

# CSS Variables

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- ◆ **You may want to use the same value in multiple styles, such as the same color for h1, h2, and h3.**
  - **But defining a color repeatedly makes it easy to make a mistake – a typo in a color hex-value, for example.**
  - **You *can* specify the color in the body style to apply it down to all other styles.**
  - **But then you'd have to specify exception colors for h4, h5, and h6.**

# CSS Variables

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- **The CSS variables feature eliminates this by letting you specify the color in one variable and then call that variable for use in different styles.**

# CSS Variables – Be Aware...

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- ◆ **No problems that I'm aware of.**

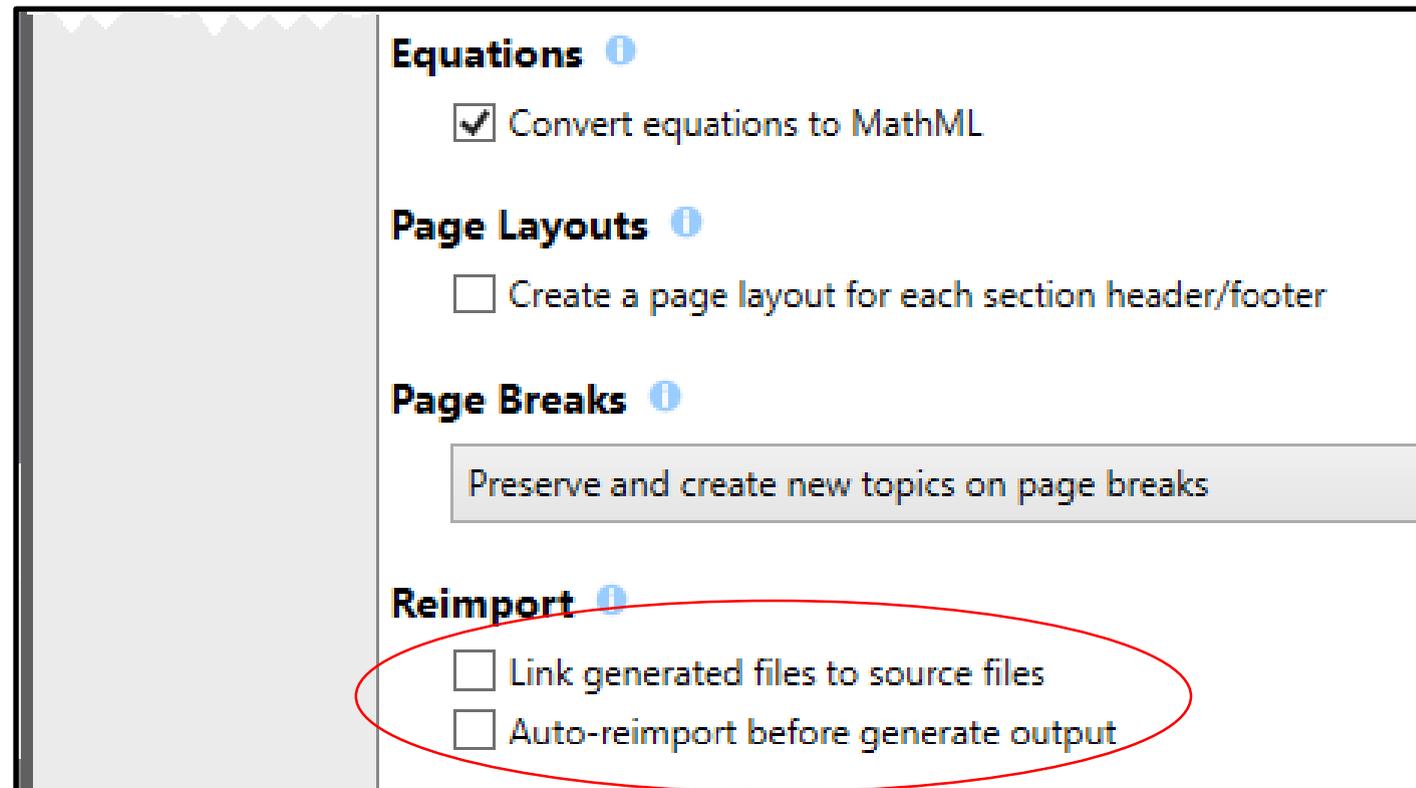


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# Other *Supporting* Features

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- ◆ **Easy-Sync feature for importing Word<sup>®</sup>, Excel<sup>®</sup>, and Framemaker<sup>®</sup> files.**
- ◆ **Under Advanced Options in Flare 2020.**
- ◆ **Can make Flare a part of an auto-mated publishing system.**



# Easy Sync – Be Aware...

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- ◆ **But setting the auto-reimport option means that the result of the last reimport will be overridden by the result of the latest one.**
- ◆ **A problem if you modified the topics created by the previous import.**
- ◆ **Very powerful but must be managed carefully.**

# Other *Supporting* Features

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- ◆ **Responsive output/layout/content** – Lets us create one target that automatically adjusts itself to different *online* display devices.
- ◆ **Irrelevant for print output.**

# Responsive – Be Aware...

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- ◆ **Can be confusing at first because you have to think of multiple formats at once.**
- ◆ **Can be confusing if not documented.**

# Other *Supporting* Features

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- ◆ **Clean XHTML target and Remove MadCap Styles feature in the Target Editor.**
- ◆ **Useful if you need to use Flare to create HTM files for use in non-Flare outputs, like wikis.**
- ◆ **No problems that I'm aware of.**



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# Other *Supporting* Features

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- ◆ **Micro content conditions...**

# Summary

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- ◆ **Four fairly obvious recommendations.**
  - **Think about what you need to do.**
  - **Think about what features meet your needs.**
  - **Think about what features to avoid no matter how cool they are.**
  - **Document.**

# Hyper/Word Services Offers...

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## **Training • Consulting • Development**

- **Flare**
- **Single sourcing • Structured authoring**
- **Assessing readiness for “mobile”**

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