madcap software

USER GUIDE

MADCAP CENTRAL

Conditions Guide

Copyright © 2024 MadCap Software. All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of MadCap Software.

MadCap Software
1660 17th Street, Suite 201
Denver, Colorado 80202
858-320-0387
www.madcapsoftware.com

THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 1

Introduction 4

CHAPTER 2

Process for Conditions 6
- Adding Condition Tag Set Files 7
- Creating Conditions 12
- Applying and Removing Conditions 14
- Editing Conditions 16
- Associating Conditions With Targets 21

CHAPTER 3

Other Activities for Conditions 32
- Showing or Hiding Applied Conditions 33
- Using Conditions to Unbind Links 37
- Renaming Condition Tag Sets 39
- Deleting Condition Tag Sets 41

APPENDIX

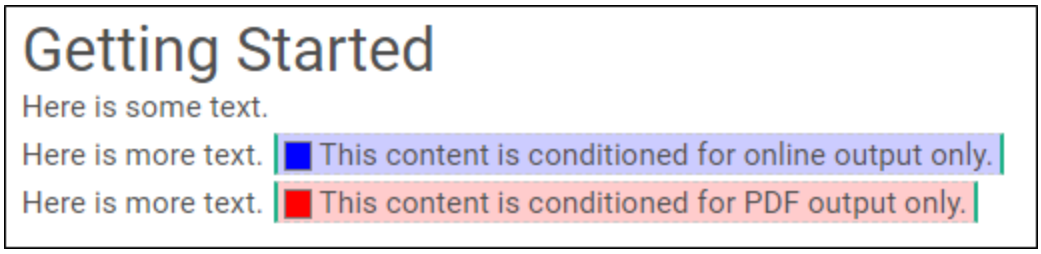
PDFs 43

CHAPTER 1

Introduction

Supported In:

A condition is a single-sourcing feature that you can apply to files or different areas of your content. Conditions can determine whether certain information displays in some outputs but not in others. You can also control whether content displays on a certain device or screen size.



Process

1. "Adding Condition Tag Set Files" on page 7
2. "Creating Conditions" on page 12
3. "Editing Conditions" on page 16
4. "Applying and Removing Conditions" on page 14
5. "Associating Conditions With Targets" on page 21

Other Activities

- "Showing or Hiding Applied Conditions" on page 33
- "Using Conditions to Unbind Links" on page 37
- "Renaming Condition Tag Sets" on page 39
- "Deleting Condition Tag Sets" on page 41

NOTE For more information about conditions, see the Flare online Help.

CHAPTER 2

Process for Conditions

Certain tasks must be completed in order when using this feature.

This chapter discusses the following:

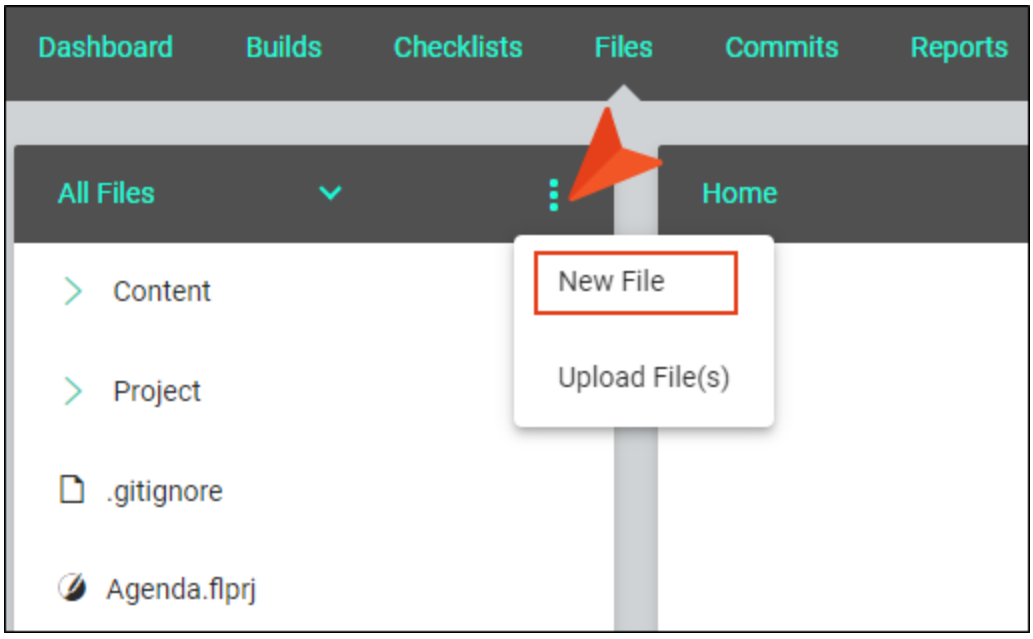
Adding Condition Tag Set Files 7
Creating Conditions 12
Applying and Removing Conditions 14
Editing Conditions 16
Associating Conditions With Targets 21

Adding Condition Tag Set Files

Use a condition tag set to hold condition tags for your project. You can add multiple condition tag sets to a project.

How to Add a Condition Tag Set File

1. Open a project, and select the **Files** tab at the top.
2. From the left side of the page, click ⋮, and select **New File**.

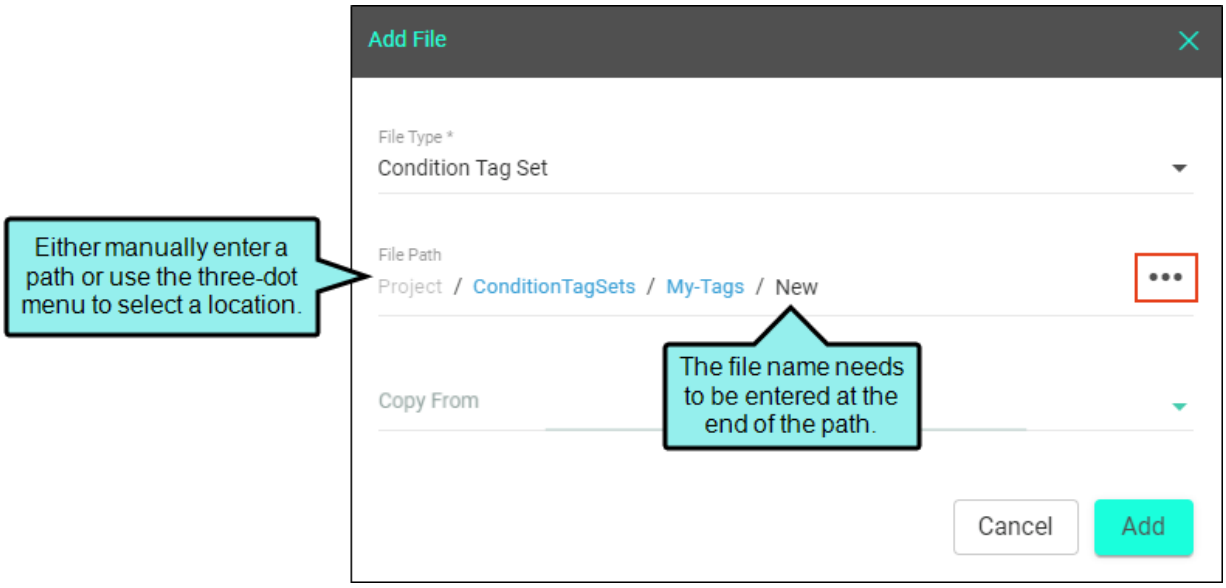


> NOTE Alternatively, you can bring an external file into your project by selecting Upload File(s).

3. In the Add File dialog, click the **File Type** drop-down, and select **Condition Tag Set**.

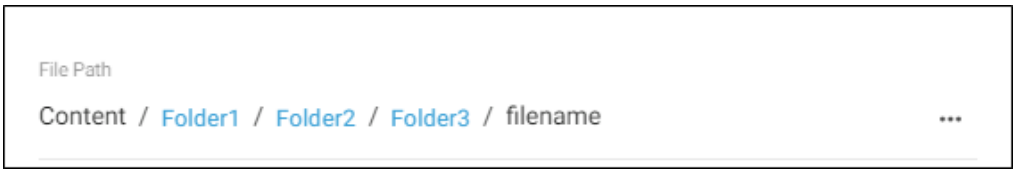
4. In the **File Path** field, enter a path and a name for the new file.

> NOTE Alternatively, click ••• to select a location for the file in the project, and **Accept** the file path. Then in the **File Path** field, enter a name for the file.



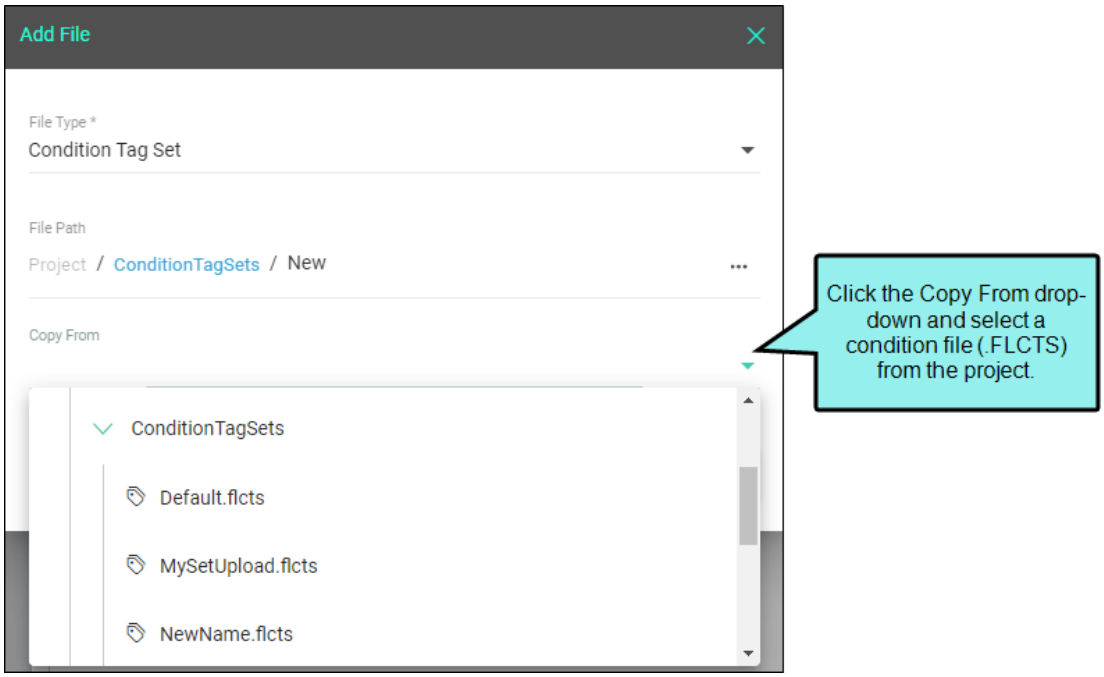
NOTE You might notice the File Path displays black or blue lettering. The blue items are folders, and you can click the item to jump to that folder.

For example, in the Add File dialog, a file path contains several folders (indicated by blue lettering) before the filename.

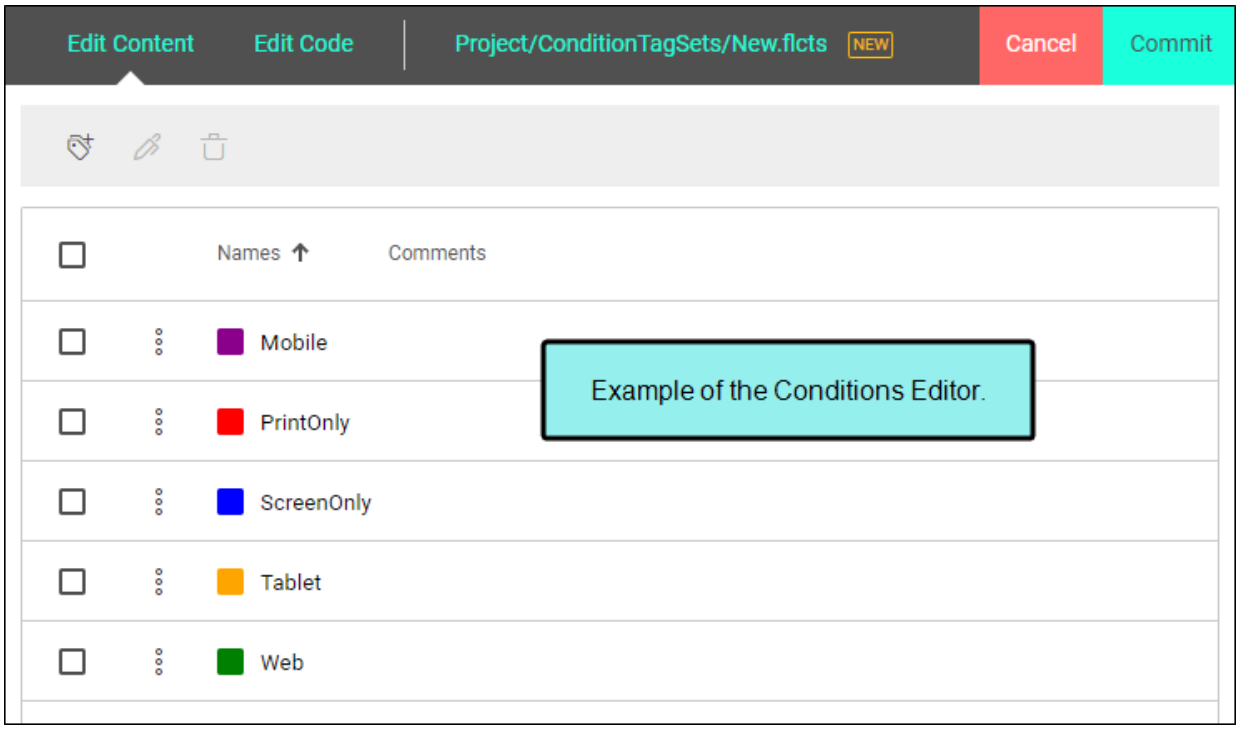


If the "Folder1" item is clicked, you know longer see the subfolders.

5. (Optional) In the Add File dialog, from the **Copy From** drop-down, you can select an existing condition file to use. This copies all the conditions from the existing file to the new file, providing a base of conditions to start with for your file. If you choose not to do this, then your new condition file is populated with a set of factory default conditions.



6. Click **Add**. A new file is created and opens in the Conditions Editor.



7. Click **Commit**. (Or click **Cancel**, to back out of the process.)
8. In the Create New Commit dialog, verify the new file path, and enter a **Commit Message**.
9. Click **Commit**. The new conditions file is added to the project.

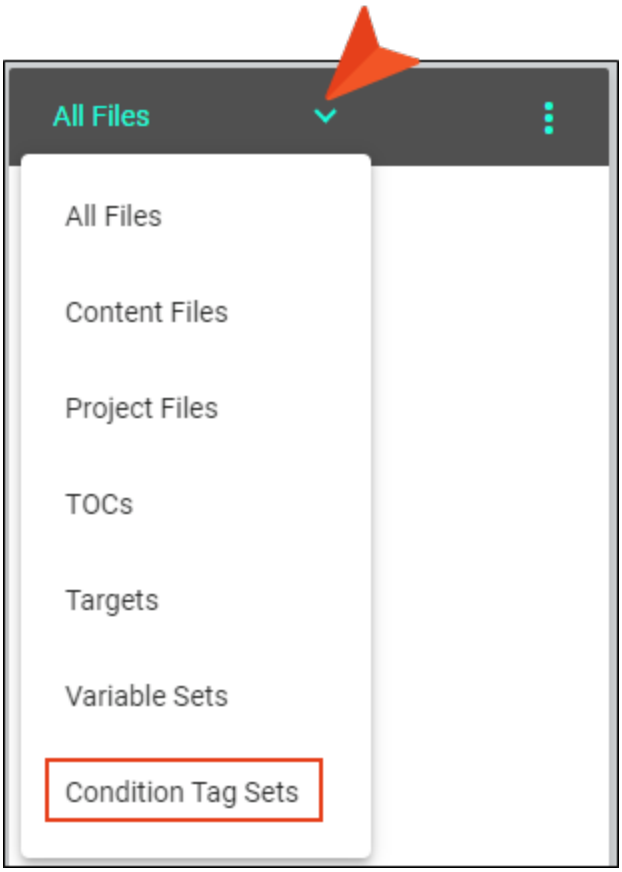
Creating Conditions

Within a condition tag set, you can create as many condition tags as you need.

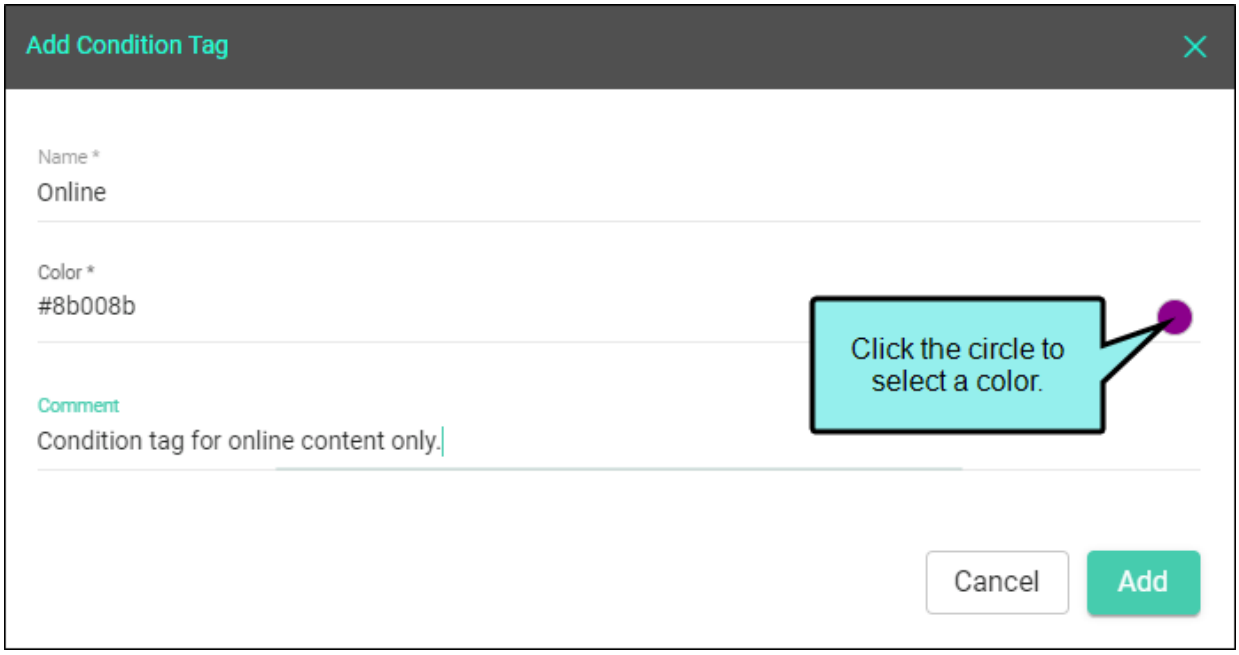
How to Create a Condition

1. Open a project, and select the **Files** tab at the top.
2. From the left side of the page, with **All Files** showing, navigate to and select a condition file.

> TIP Click the **All Files** drop-down, and select **Condition Tag Sets**. This filters only the condition files to display in the files panel.



3. In the Conditions Editor, click **Edit**.
4. In the local toolbar, select .
5. In the Add Condition Tag dialog, provide a unique **Name**, select a **Color**, and (optionally) enter a **Comment**.



> NOTE By default, the Name and Comment fields are empty, and the Color field is populated with a random value. You can keep the value or change it.

6. Click **Add**.
7. Click **Commit**. (Or click **Cancel**, to back out of the process.)
8. In the Create New Commit dialog, enter a **Commit Message**.
9. Click **Commit**.

Applying and Removing Conditions

After you create condition tags in a project, you can apply them to your content. You can also remove a condition from content.

How to Apply a Condition to Content

1. Open a project, and select the **Files** tab at the top.
2. On the left, navigate to a topic or snippet file. The file contents display on the right.
3. In the upper-right of the Content Editor, click **Edit**.
4. In the Content Editor, highlight or select the content to which you want to apply a condition. You can also click tags in the info bar to select certain blocks of content.
5. From the Content Editor's local toolbar, click .
6. On the left, select the appropriate condition set.
7. On the right, select the condition you want to apply.
8. (Optional) If you are applying a condition to a link, you have access to a couple of other **Exclude Action** options—**Remove** and **Unbind**. The Unbind option can be useful under certain circumstances if you are setting a condition on a link. See "Using Conditions to Unbind Links" on page 37.
9. Click **Apply**.

How to Remove a Condition From Content

1. Open a project, and select the **Files** tab at the top.
2. On the left, navigate to a topic or snippet file. The file contents display on the right.
3. In the upper-right of the Content Editor, click **Edit**.
4. In the Content Editor, highlight or select the content to which a condition has been applied. You can also click tags in the info bar to select certain blocks of content.
5. From the Content Editor's local toolbar, click .
6. On the left, select the appropriate condition set.
7. On the right, select the condition you want to unbind from that content, removing the check mark.
8. Click **Apply**.

What's Noteworthy?

NOTE Applying conditions is available only for authors, and only in the Content Editor accessed from the project's Files page. It is not available in the editor that is used for topic reviews.

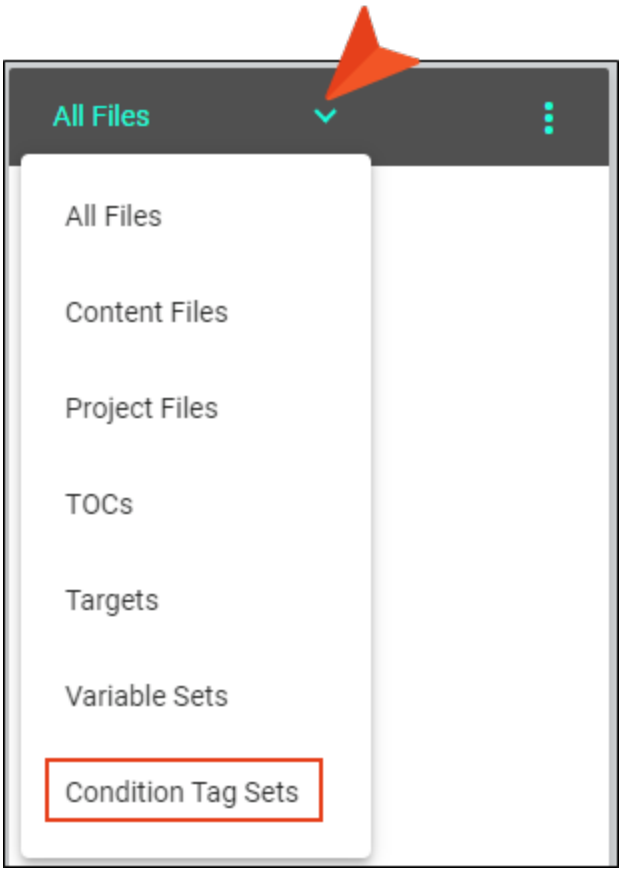
Editing Conditions

If necessary, you can edit the name, color, or comments for a condition tag that you have created.

How to Edit a Condition

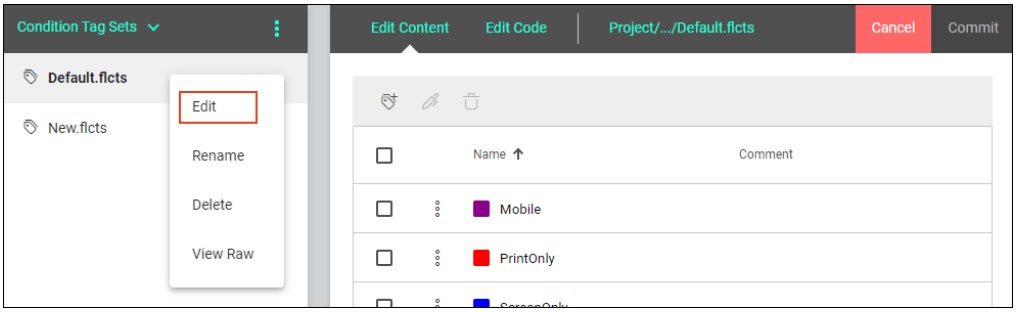
1. Open a project, and select the **Files** tab at the top.
2. From the left side of the page, with **All Files** showing, navigate to and select a condition file.

> TIP Click the **All Files** drop-down, and select **Condition Tag Sets**. This filters only the condition files to display in the files panel.



3. In the Conditions Editor, click **Edit**.

> **TIP** From the left side of the page, you can right-click to select and open a condition tag set directly in editing mode. From this menu, you can also rename, delete, or view raw (i.e., opens the file code in a browser).

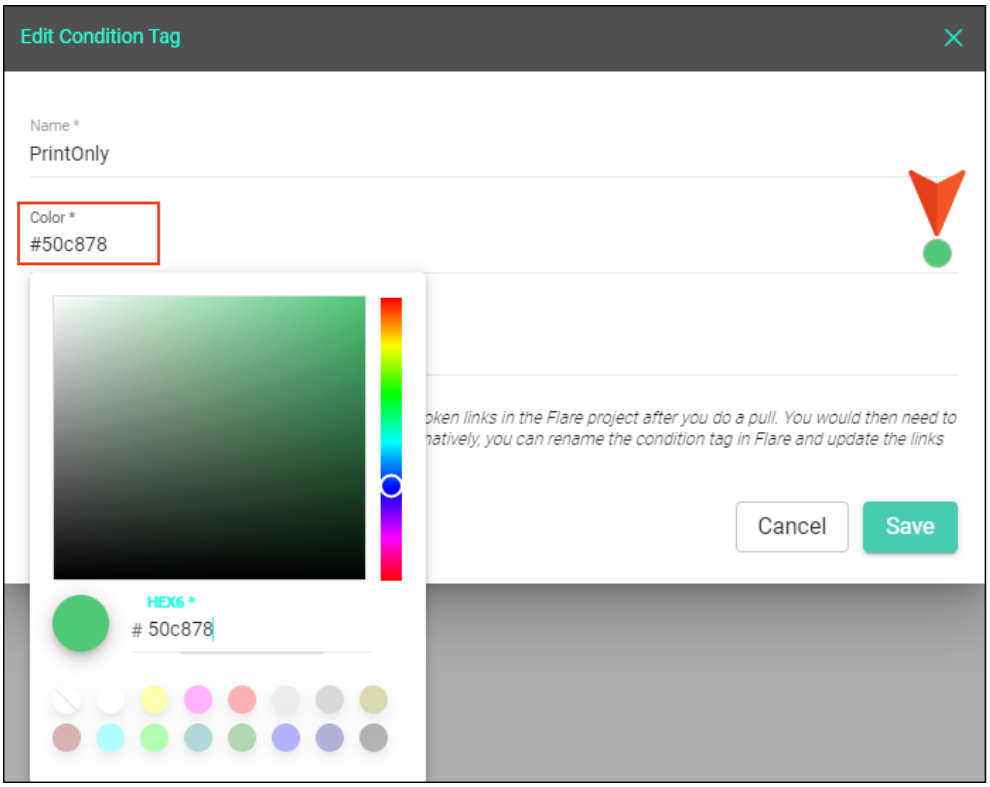


4. From a condition row, select the check box, and from the local toolbar click . (Editing is only enabled if you select a single condition.)

> **NOTE** Alternatively, from a condition row you can click and select **Edit**, or you can right-click the condition row and select **Edit**.

5. In the Edit Condition Tag dialog, you can change the **Name**, select a **Color**, and (optionally) enter a **Comment**.

> ☆ EXAMPLE One of your branding colors is emerald green, and you want to change the color that represents the condition in the editor to that green. In the Edit Condition Tag dialog, you can enter the hex code in the Color field (e.g., #50C878). Or, click the color circle for the color picker where you can enter the hex number or select another color.



6. Click **Save**. The Conditions Editor updates with the edited information for the tag.

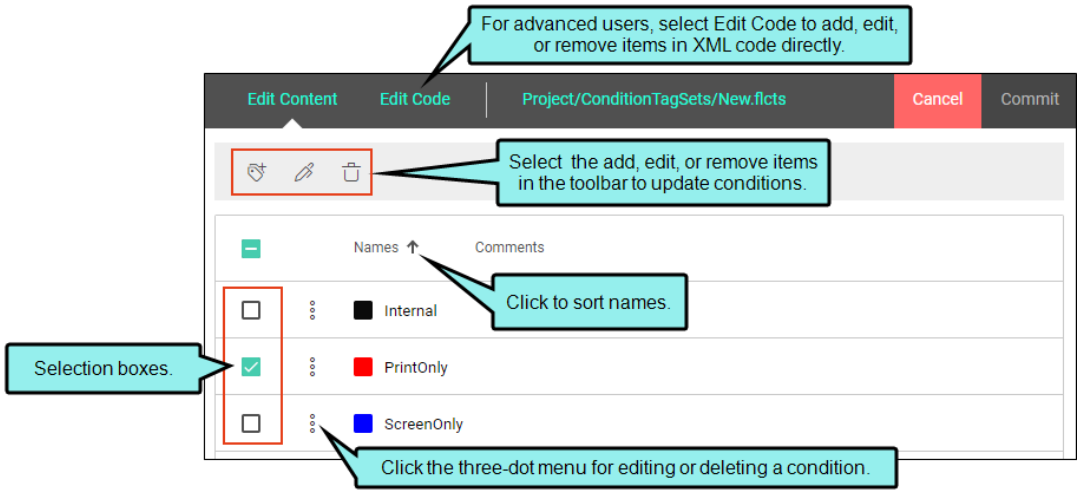
7. (Optional) You can further edit a condition by removing it from a condition tag set. From a condition row, select the check box, and from the local toolbar click .

> NOTE Alternatively, from a condition row you can click and select **Delete**, or you can right-click the condition row and select **Delete**.

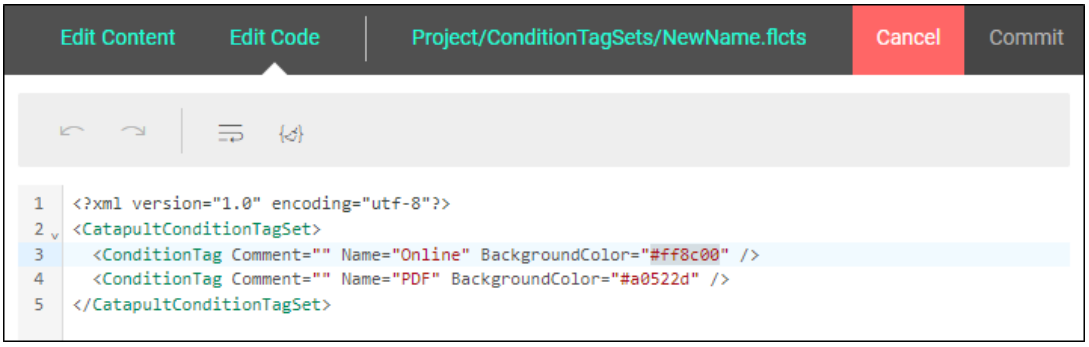
8. Click **Commit**. (Or click **Cancel**, to back out of the process.)
9. In the Create New Commit dialog, enter a **Commit Message**.
10. Click **Commit**.

What's Noteworthy?

> NOTE Keep the following in mind when editing conditions.
>
> - For a condition row, you can select to edit or delete a tag.
> - In the Edit Content tab, you can sort the order of the Name column in three ways: ascending, descending, and not set (items order in file).
> - Selection of conditions determines the state of the items in the local toolbar. For example, an empty selection (no boxes selected) only enables the add button. A single selection enables all buttons. A multi-selection enables the add and remove buttons.



NOTE From the top of the interface, you can select **Edit Code** to add, edit, or remove items in the XML code directly. The editor only displays properties that it can edit. It is recommended that only more advanced authors use this editing mode.



Associating Conditions With Targets

Supported In:

> NOTE Only HTML5 and PDF targets can be added and edited in Central. Also, only the most common target options are available in Central. For all of the additional target options—and to add or edit targets for the other output types—you need to use Flare.

After creating and applying conditions, you need to tell Central what your target should do with those conditions. Should content with a particular condition tag be included in or excluded from that target, or should it display only when viewed on a certain device or screen size?

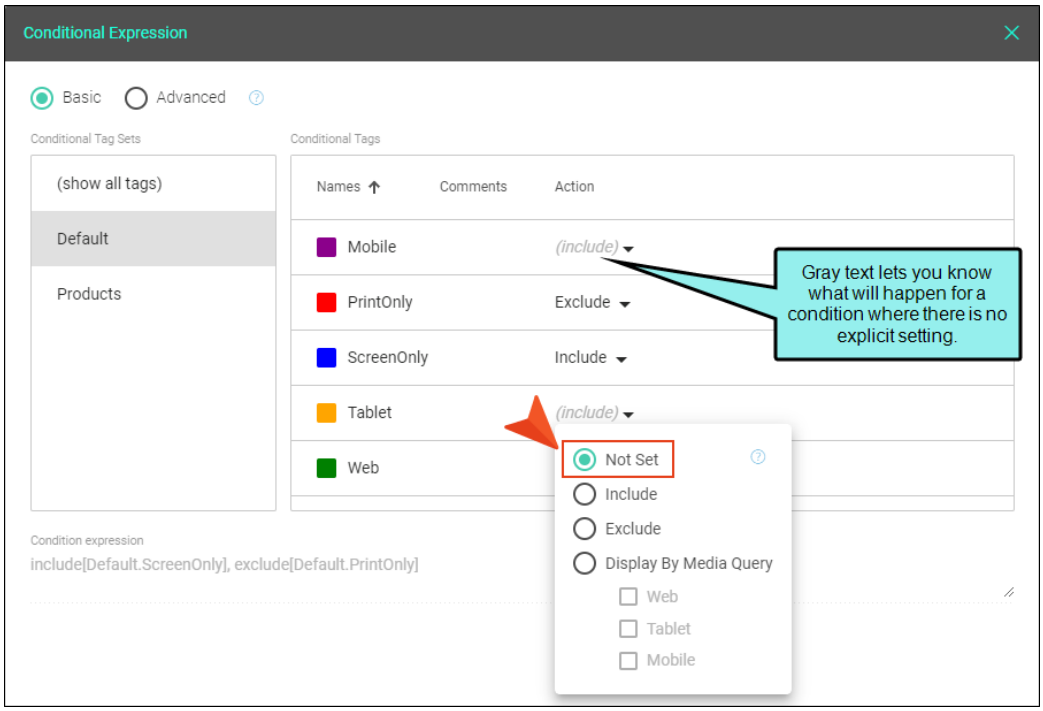
How to Associate Conditions With a Target

1. From the **Projects** page (**Files** tab), open an HTML5 or PDF target and in the upper-right click **Edit**.
2. On the left, make sure **General** is selected.
3. On the right side of the **Conditional Expression** field, click ⋯.
4. In the **Condition Tag Sets** area, you can choose to view tags for all condition tag sets or you can select a specific set. The tags associated with the selected set are shown to the right, with their associated colors. An Action cell appears next to each condition tag. When Basic is selected, the Action cell is shown and the Advanced section below is disabled.

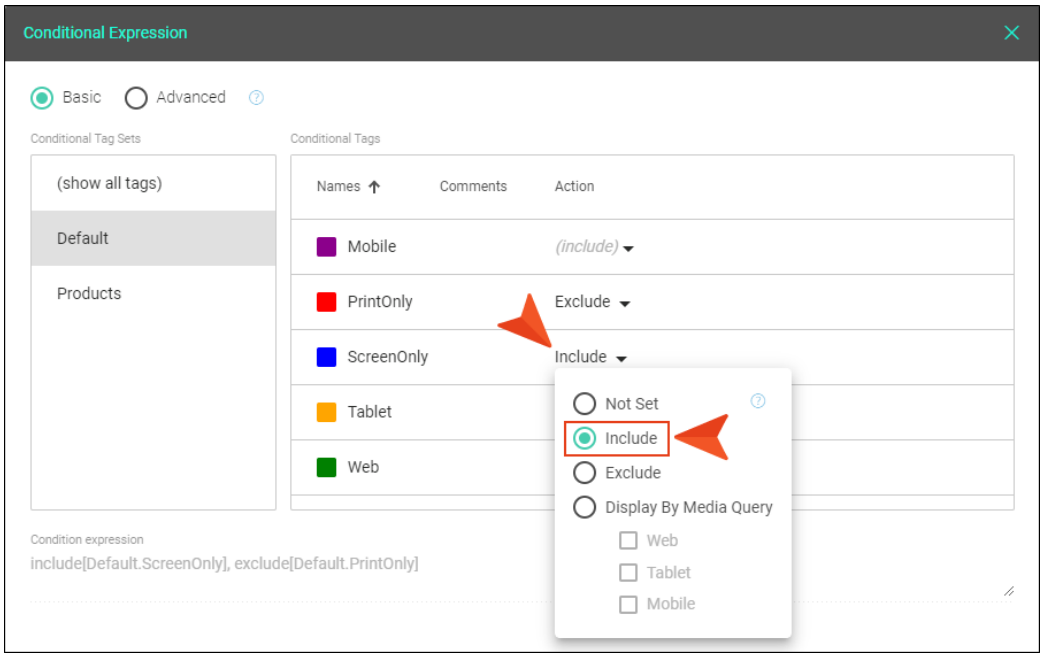
5. The Action cell in the grid indicates the current setting for the condition. The text is gray if you have not explicitly chosen an option. To change the setting, click the down arrow and choose one of the options.

ACTION OPTIONS

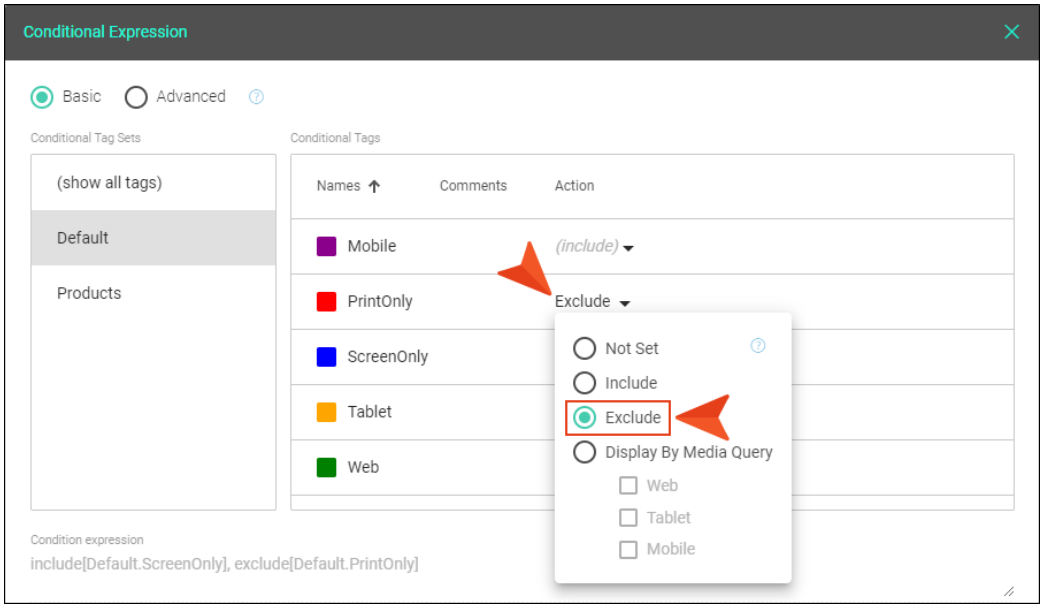
- **Not Set** If an action is not set on a condition, its behavior may vary (i.e., it might be included or excluded). This depends on whether or how you have set other conditions.



- **Include** Select this if you want the content associated with the condition to always display in the target's output.



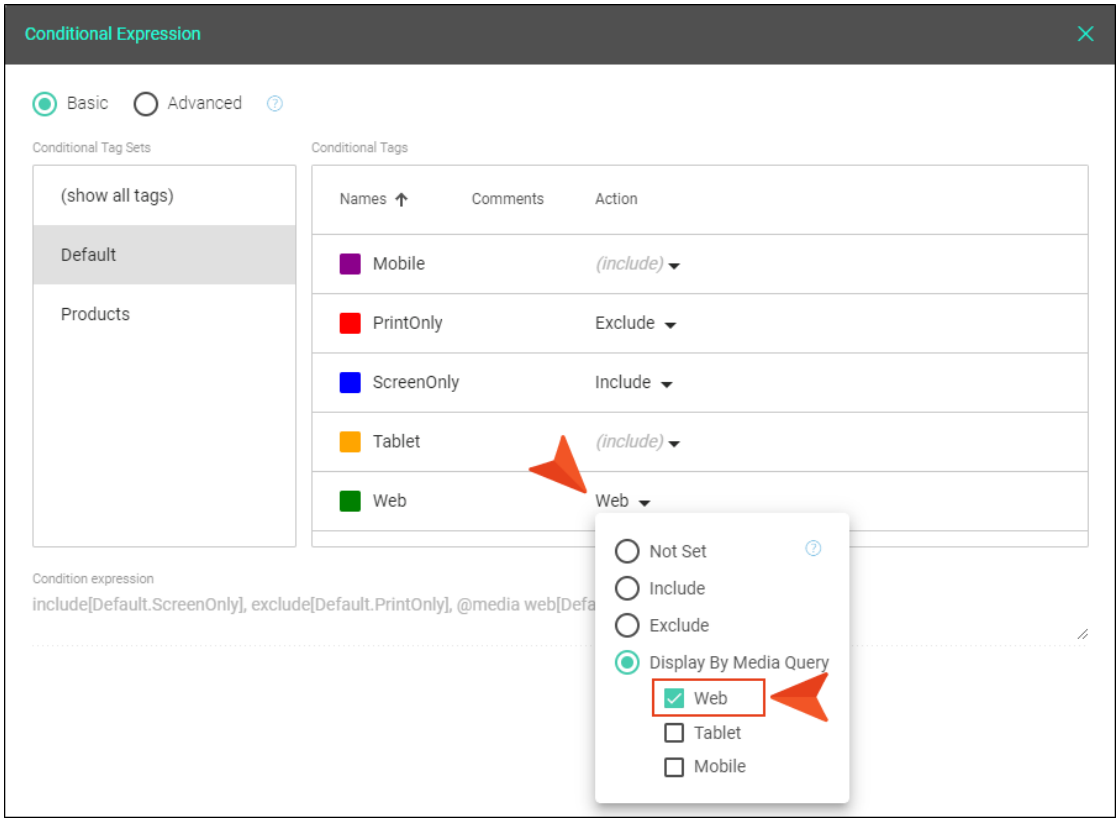
- **Exclude** Select this if you want the content associated with the condition to never display in the target's output.



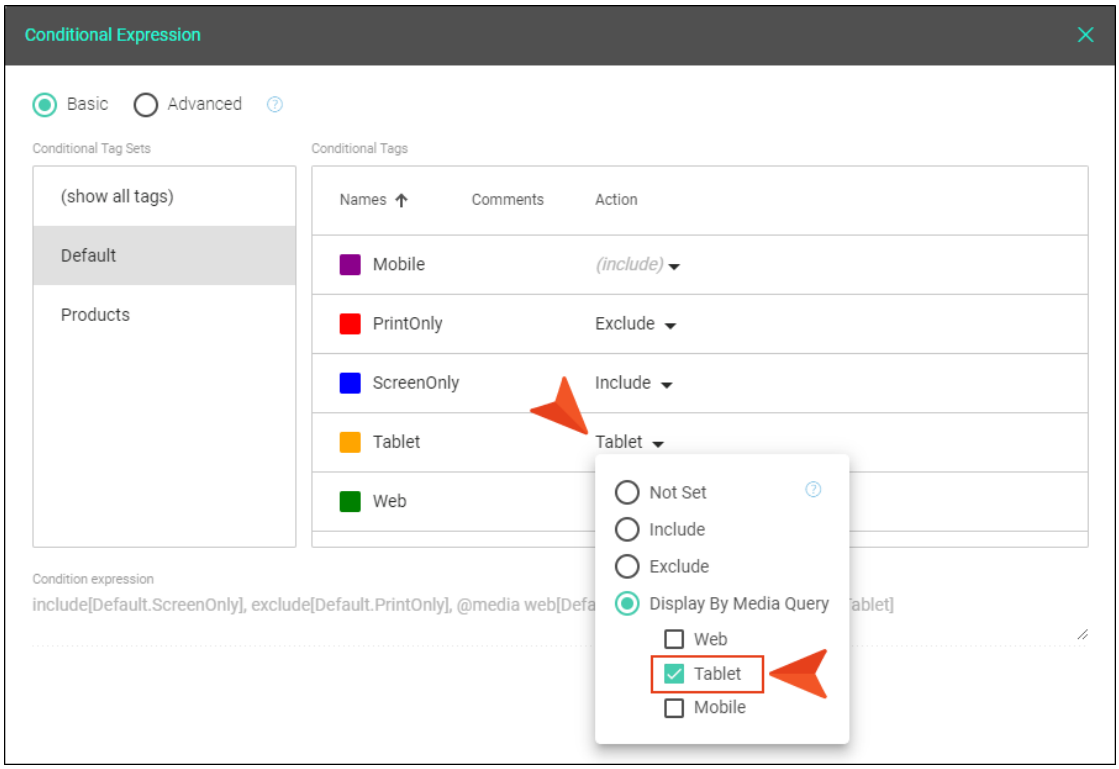
- **Display by Media Query** Select this if you are working in an HTML5 target and want the content associated with the condition to display only when the user is viewing the output on a particular device or screen size (according to the responsive output breakpoints that are set in the target or skin).

  After selecting this option, choose one or more of the media query check boxes. The Active cell in the grid updates accordingly.

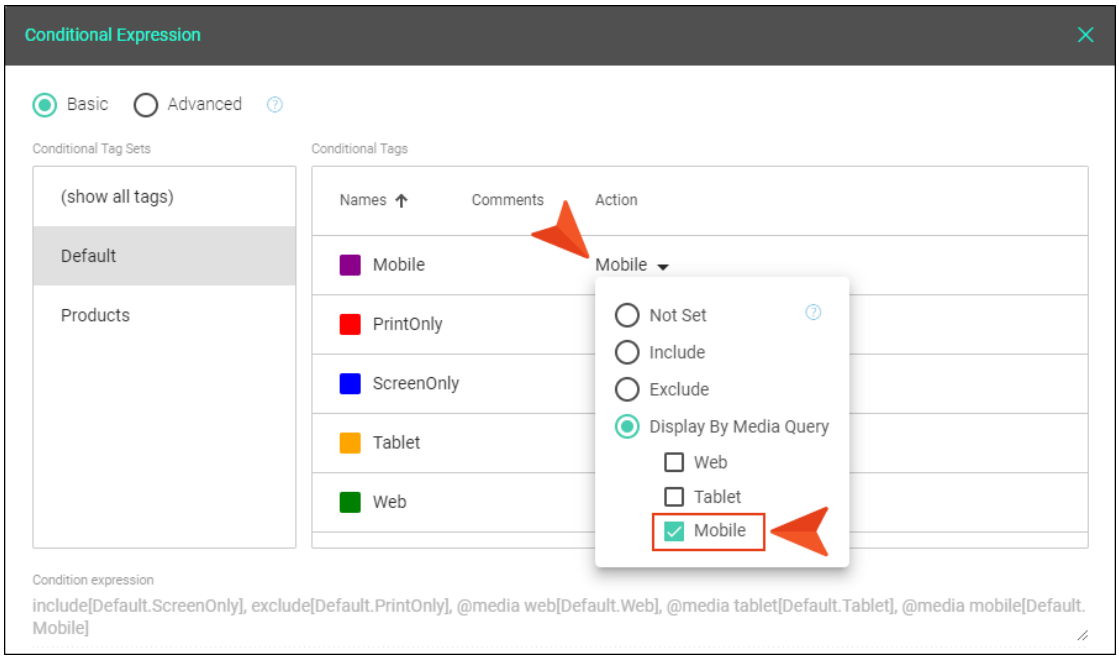
  - **Web** The content will display if the user is viewing it on a large screen.



- **Tablet** The content will display if the user is viewing it on a medium screen, such as an iPad.

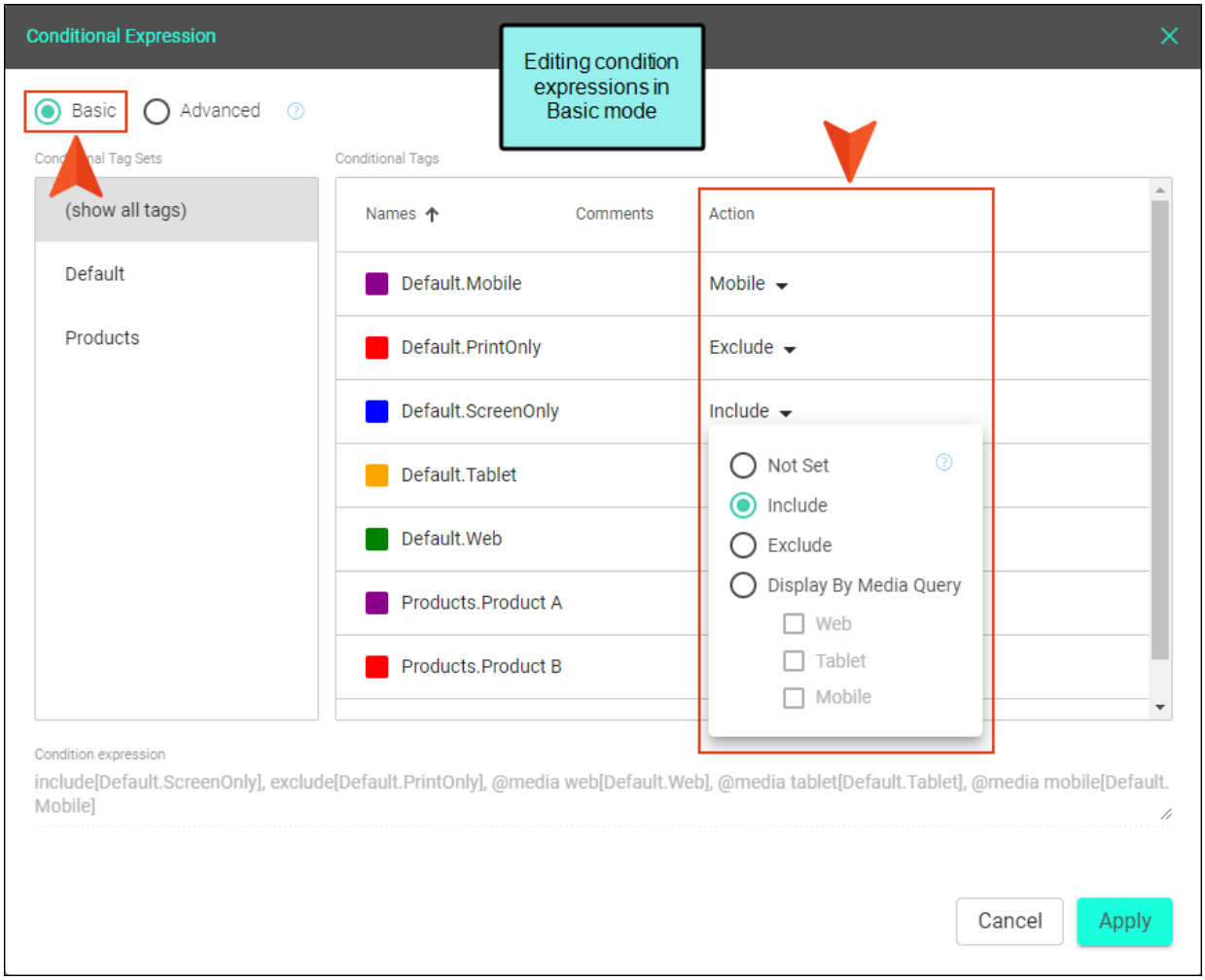


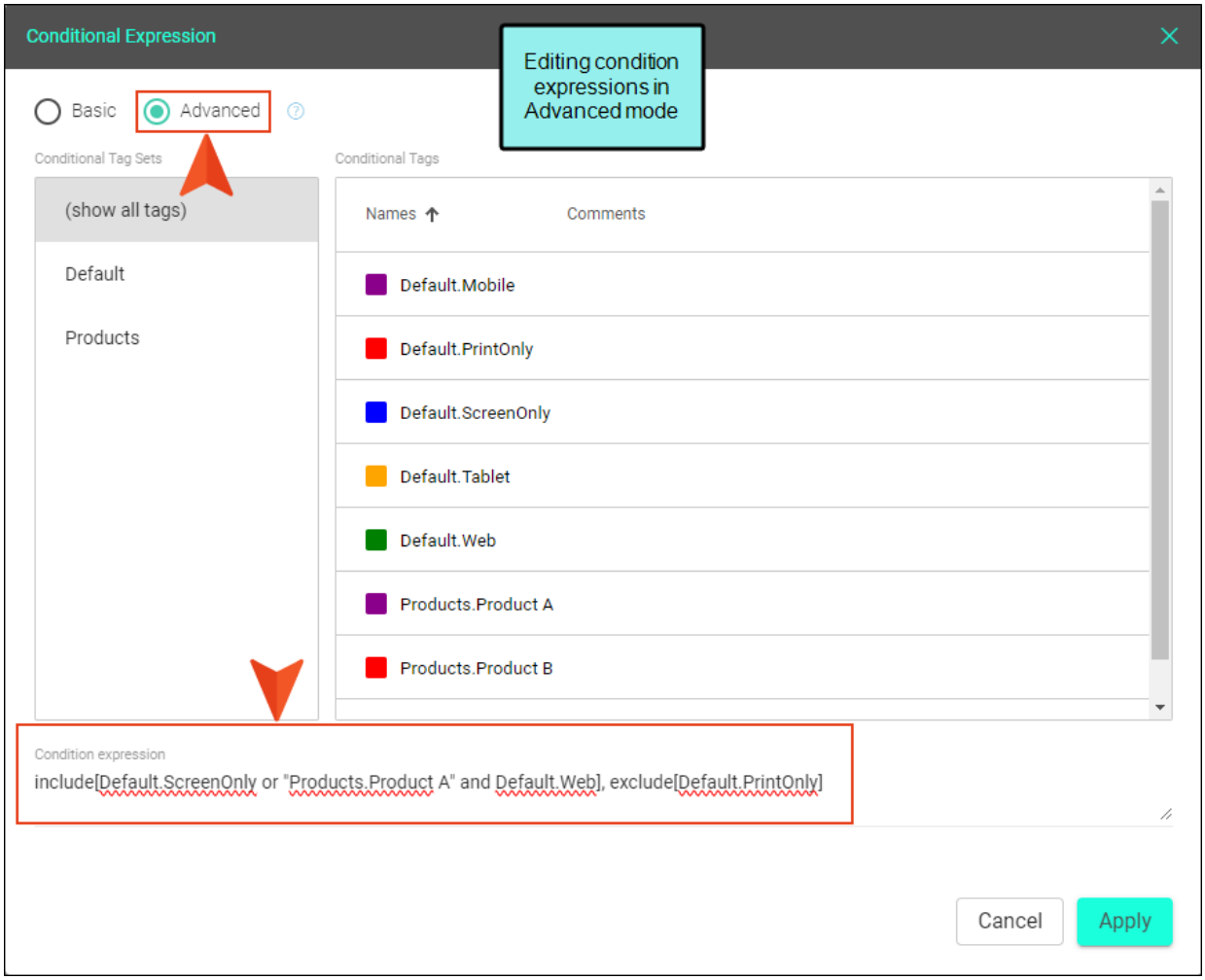
- **Mobile** The content will display if the user is viewing it on a small screen, such as an iPhone.



BASIC AND ADVANCED CONDITIONS

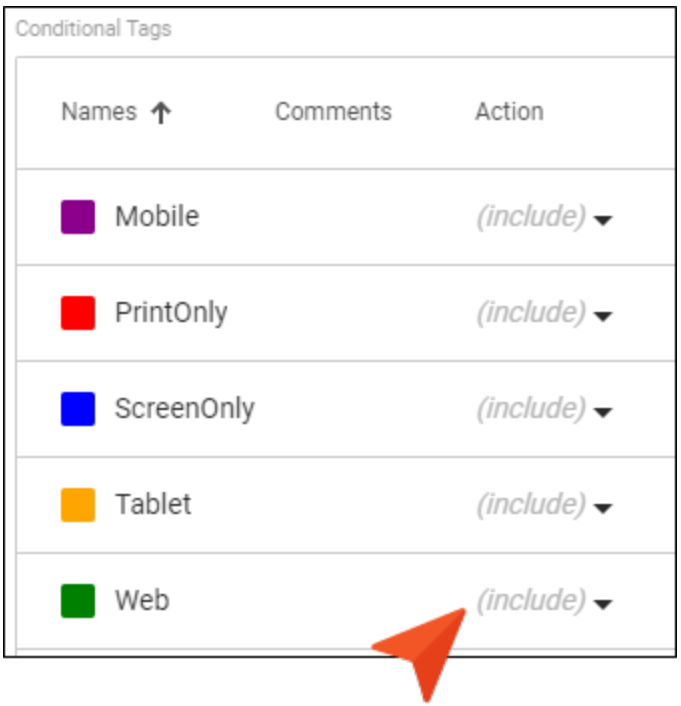
When you create condition tag expressions, you have the choice of working with conditions in Basic or Advanced mode. You can switch between the two modes by clicking **Basic** or **Advanced** at the top of the dialog. You can use Basic if you are newer to condition tag expressions, or you can use the Advanced mode if you are experienced at writing condition tag expressions by hand. If you are in Basic mode, the drop-downs in the grid are accessible and the condition expression text field at the bottom is disabled. If you are in Advanced mode, the drop-downs in the grid are hidden and the condition expression text field at the bottom is enabled for you to edit. While the Basic section is easier for most people to use, it is also more limited in the type of expressions it can create.

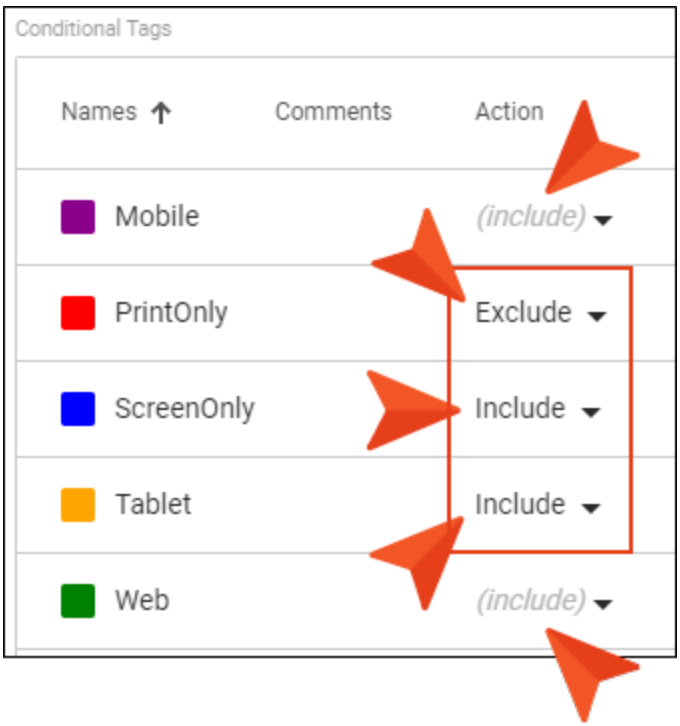

Conditional Expression
Editing condition expressions in Basic mode
Basic
Advanced
Conditional Tag Sets
Conditional Tags
(show all tags)
Default
Products
Names
Comments
Action
Default.Mobile
Mobile
Default.PrintOnly
Exclude
Default.ScreenOnly
Include
Default.Tablet
Default.Web
Products.Product A
Products.Product B
Not Set
Include
Exclude
Display By Media Query
Web
Tablet
Mobile
Condition expression
include[Default.ScreenOnly], exclude[Default.PrintOnly], @media web[Default.Web], @media tablet[Default.Tablet], @media mobile[Default.Mobile]
Cancel
Apply

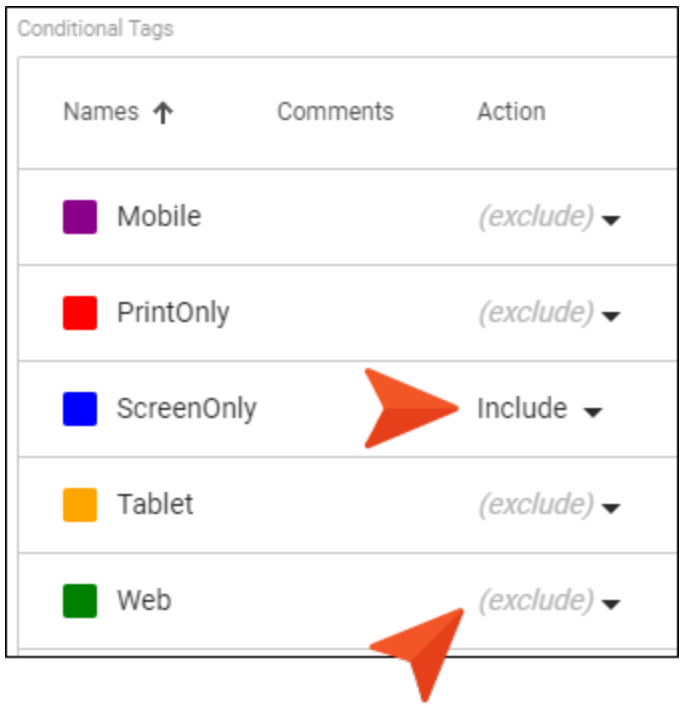


WARNING If you decide to use the Advanced mode, the expression automatically inherits any settings that have already been made in Basic mode. However, if you make changes in Advanced mode, you should continue in that mode from this point on. If you switch back to Basic mode, you will lose settings.

WARNING The condition feature is an inclusive system. If you do not select any options, all of the tags will automatically be *included*, as indicated by the gray text in the Action cell. If you include only some tags and exclude others, any remaining tags without options specifically set will automatically be *included*. However, if you select Include for any of the tags (even just one) and do not select Exclude for any tags, all of the other tags that do not have the Include option set explicitly will automatically be *excluded*. If you have not explicitly set an option for a condition tag, make sure you look at the gray text in the Action cell to know what will happen for that tag in the output.




Conditional Tags
Names
Comments
Action
Mobile
(include)
PrintOnly
Exclude
ScreenOnly
Include
Tablet
Include
Web
(include)



6. Click **Apply**.
7. Click **Commit**. (Or click **Cancel**, to back out of the process.)
8. In the Create New Commit dialog, enter a **Commit Message**.
9. Click **Commit**.

NOTE When you generate the target, Central uses the expression from the section that is last saved—Basic or Advanced.

CHAPTER 3

Other Activities for Conditions

In addition to the main activities, there are some other tasks you might perform regarding this feature.

This chapter discusses the following:

Showing or Hiding Applied Conditions 33

Using Conditions to Unbind Links 37

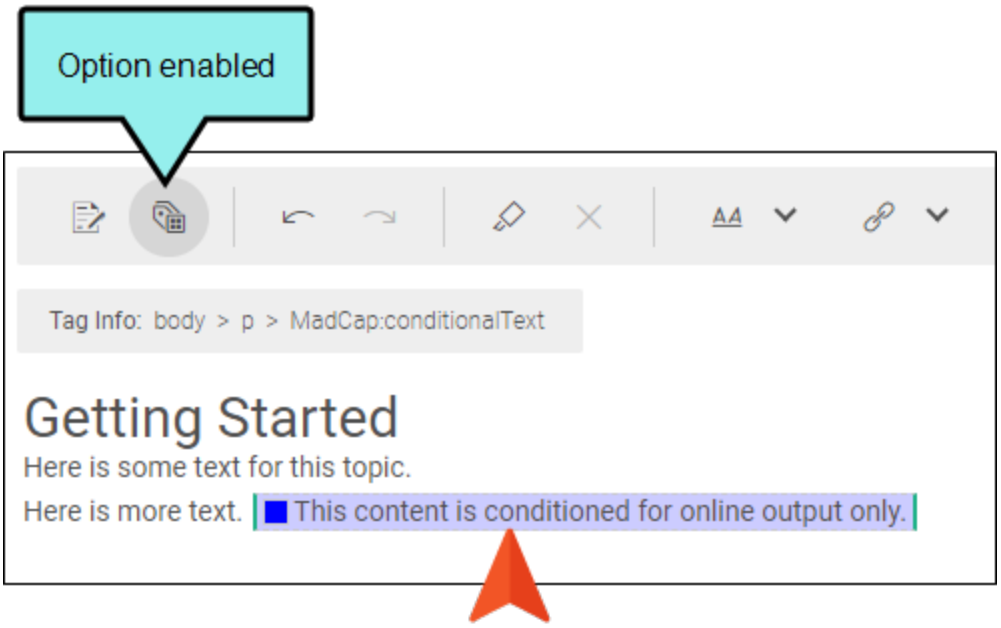
Renaming Condition Tag Sets 39

Deleting Condition Tag Sets 41

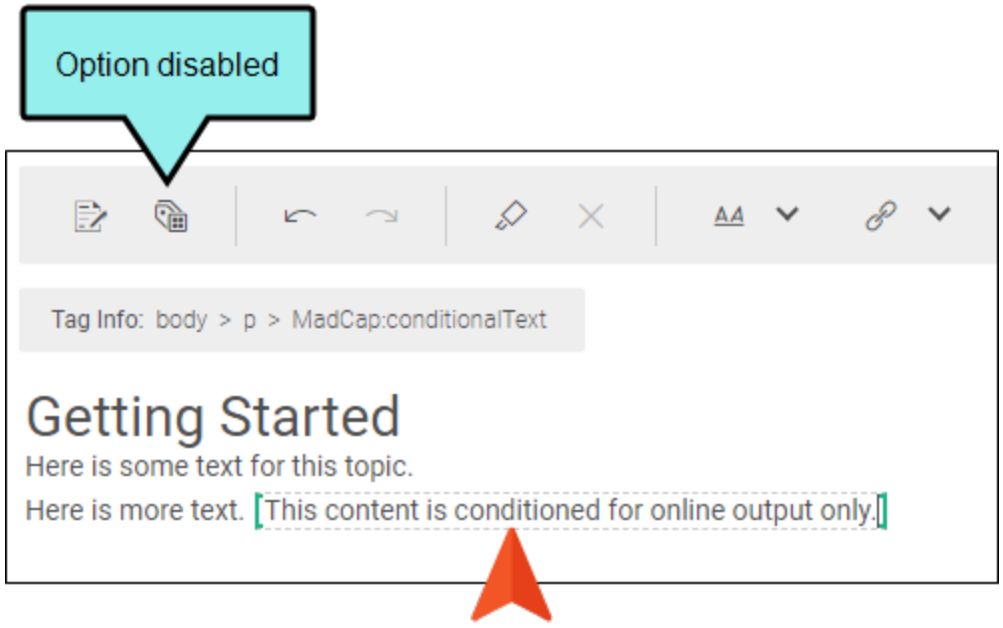
Showing or Hiding Applied Conditions

In the Content Editor and Review Editor, you can click in the toolbar. This button toggles between showing or hiding indicators next to content where conditions have been applied.

☆ EXAMPLE Your condition has blue associated with it. With the Show Conditions indicator on, a small colored square displays and the content becomes shaded with a lighter version of blue.



☆ If you click the toggle button again, the square and blue shading are hidden.



If more than one condition is applied to the content, the square and shading appear in a pattern that shows all of the applied condition colors.

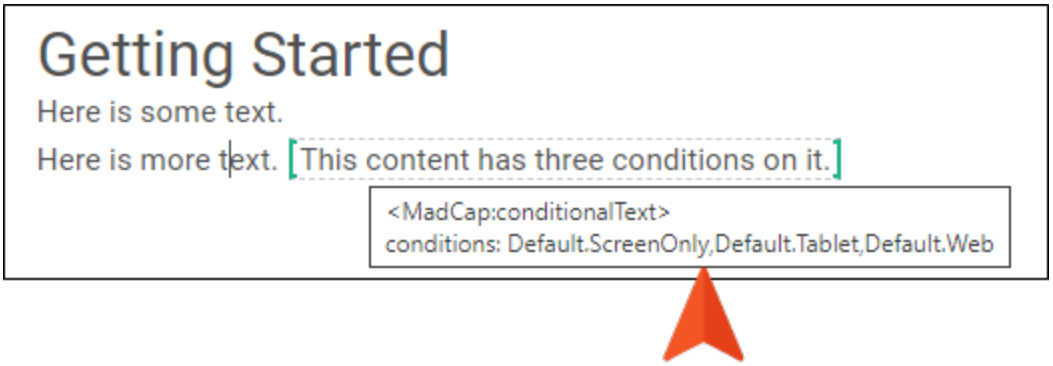
EXAMPLE

The following content has three conditions applied to it.

You can also see which conditions are applied to content by hovering over it. A popup displays the conditions applied. This is possible whether the Show Conditions button is enabled or disabled.

☆ EXAMPLE

The following content has three conditions applied to it, as indicated by the hover popup. In this example, the option to show condition indicators happens to be off.



NOTE A small square is not always shown on conditioned content. It depends on the situation and the type of content.

Using Conditions to Unbind Links

In addition to applying condition tags to various content in your project, you may want to use them to unbind links from print-based output, displaying the text only.

☆ EXAMPLE You are creating both online and PDF output from your project. You might have some content where you have inserted hyperlinks, and you want this content to be included in both the online and PDF output. However, let's say that a particular hyperlink connects to another topic that you are not including in the PDF. When you generate the online output, everything is fine. But when you generate the PDF, an error is displayed in the log because the compiler cannot find the topic referenced in the hyperlink.

The way to avoid seeing the error (and to avoid users experiencing a broken link in the output) is to apply a condition tag (e.g., "OnlineOnly") to the hyperlink and select the option in the dialog to unbind the link. If you then exclude that condition tag from your print target, you will still see the hyperlink text in the PDF, but the link will be removed. Therefore, you will no longer receive an error and the link will not be broken.

How to Use a Condition to Unbind a Link

1. Open a project, and select the Files tab at the top.
2. On the left, navigate to a topic or snippet file. The file contents display on the right.
3. In the upper-right of the Content Editor, click Edit.
4. In the Content Editor highlight or select the content to which you want to apply a condition (or one that already has a condition). You can also click tags in the info bar to select certain blocks of content.
5. From the Content Editor's local toolbar, click .
6. On the left, select the appropriate condition set.
7. On the right, select the condition you want to apply.
8. In the Exclude Action section, select Unbind.

   In other words, you are telling Central this: Keep the hyperlink in the targets that are associated with the tags that I selected. For the targets not associated with those tags, get rid of the hyperlink, but do not remove the text.

   On the other hand, if you had selected the "Remove" option, you would have been telling Central this: Keep the hyperlink in the targets that are associated with the tags that I selected. For the targets not associated with those tags, remove both the hyperlink *and* the text.
9. Click Apply.

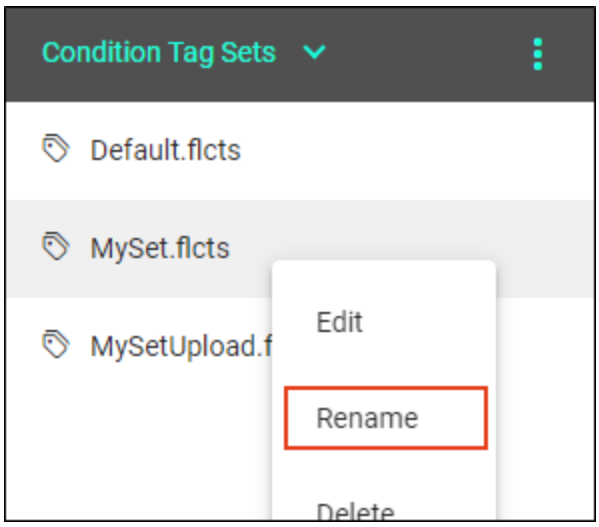
Renaming Condition Tag Sets

You can rename the default condition tag set or any others that you add to your project.

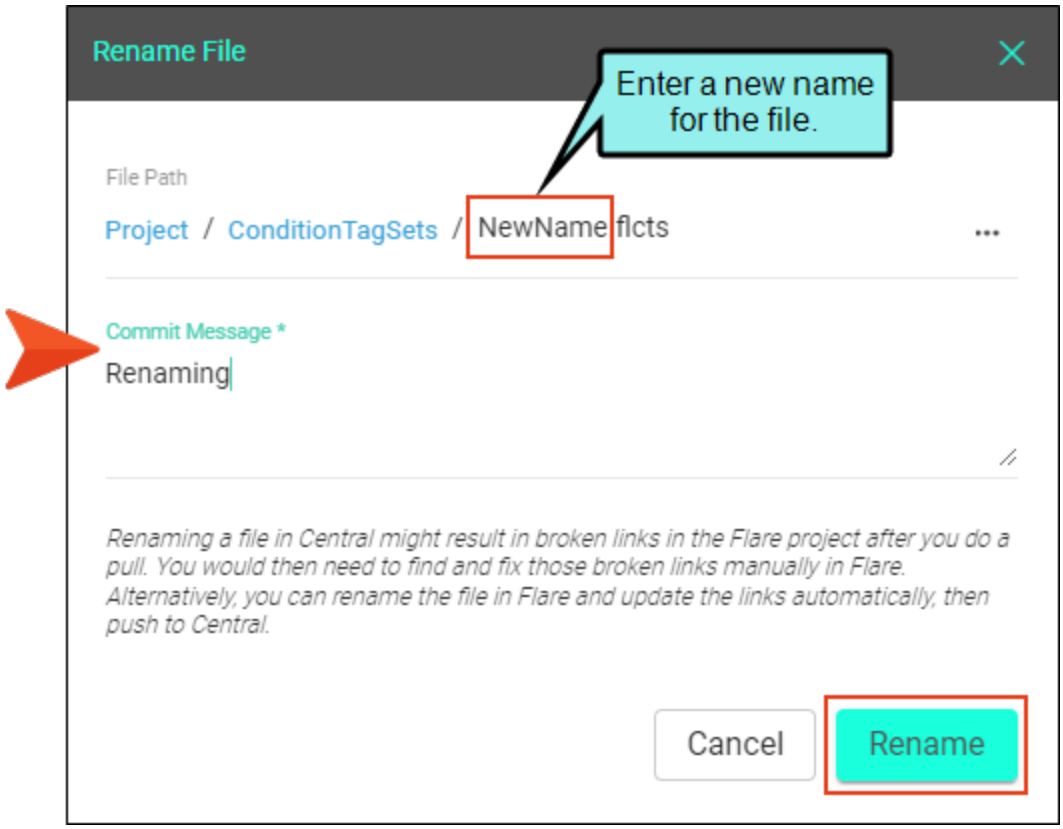
> **WARNING**
>
> If you want to rename a condition in Central it is better to do the renaming before applying the condition anywhere in the content. Otherwise, renaming a condition can result in broken links. If you end up with broken links, try:
>
> - Re-applying the conditions manually in Central (if you have a only a few applied).
> - Pulling the changes down to Flare, and performing a global find and replace to update the broken links in the code.

How to Rename a Condition Tag Set

1. Open a project, and select the **Files** tab at the top.
2. From the left side of the page, click the **All Files** drop-down, and select **Condition Tag Sets**.
3. Right-click the condition file you want to rename, and from the menu select **Rename**.



4. In the Rename File dialog, enter a new name for the file, enter a **Commit Message**, and select **Rename**.

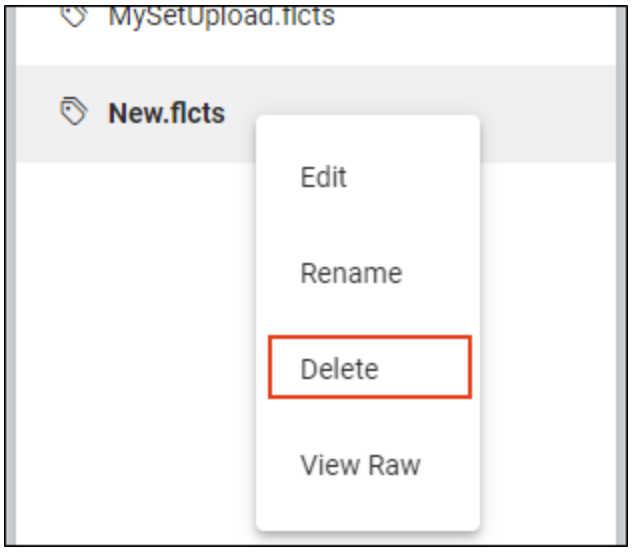


Deleting Condition Tag Sets

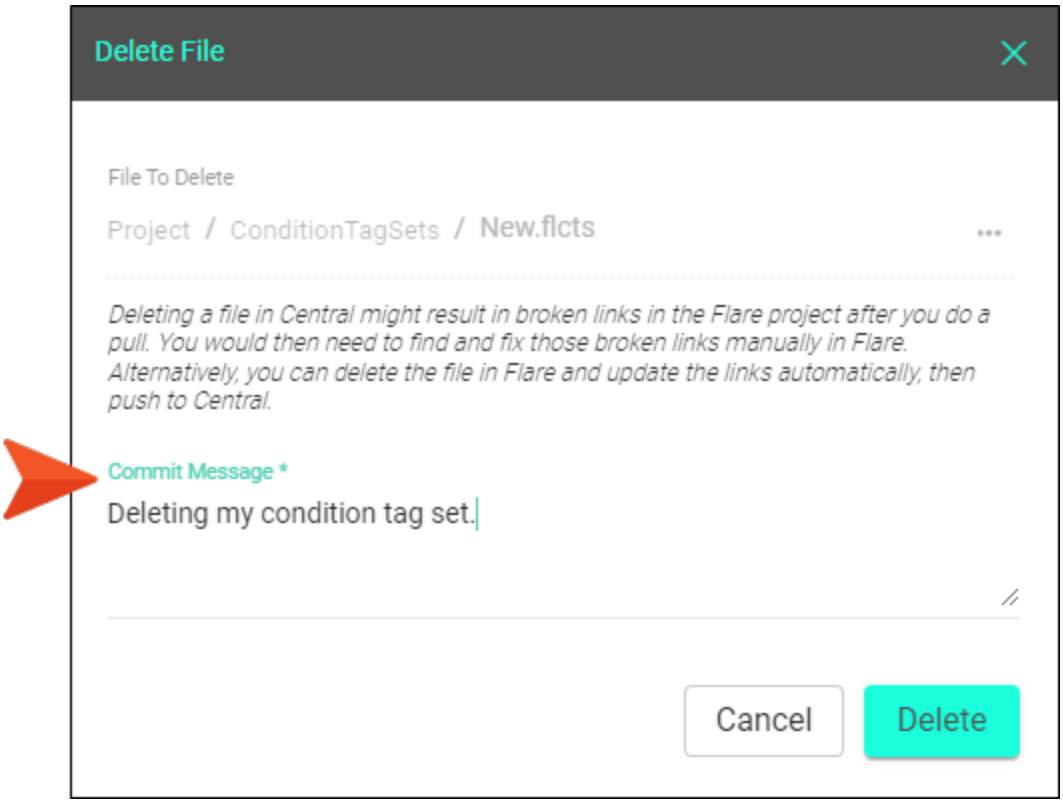
If necessary, you can delete a condition tag set file from your project.

How to Delete a Condition Tag Set

1. Open a project, and select the **Files** tab at the top.
2. From the left side of the page, click the **All Files** drop-down, and select **Condition Tag Sets**.
3. Right-click the condition file you want to delete, and from the menu select **Delete**.



4. In the Delete File dialog, enter a **Commit Message**, and select **Delete**.



PDFs

The following PDFs are available for download from the online Help.

AI Assist Guide

Analytics Guide

Authoring Guide

Branding Guide

Building Output Guide

Checklists Guide

Conditions Guide

Getting Started Guide

Images and Multimedia Guide

License Management and Purchasing Guide

Navigation Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Targets Guide

Tasks Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide