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MADCAP CONTRIBUTOR 9 r3

# Contribution Workflow

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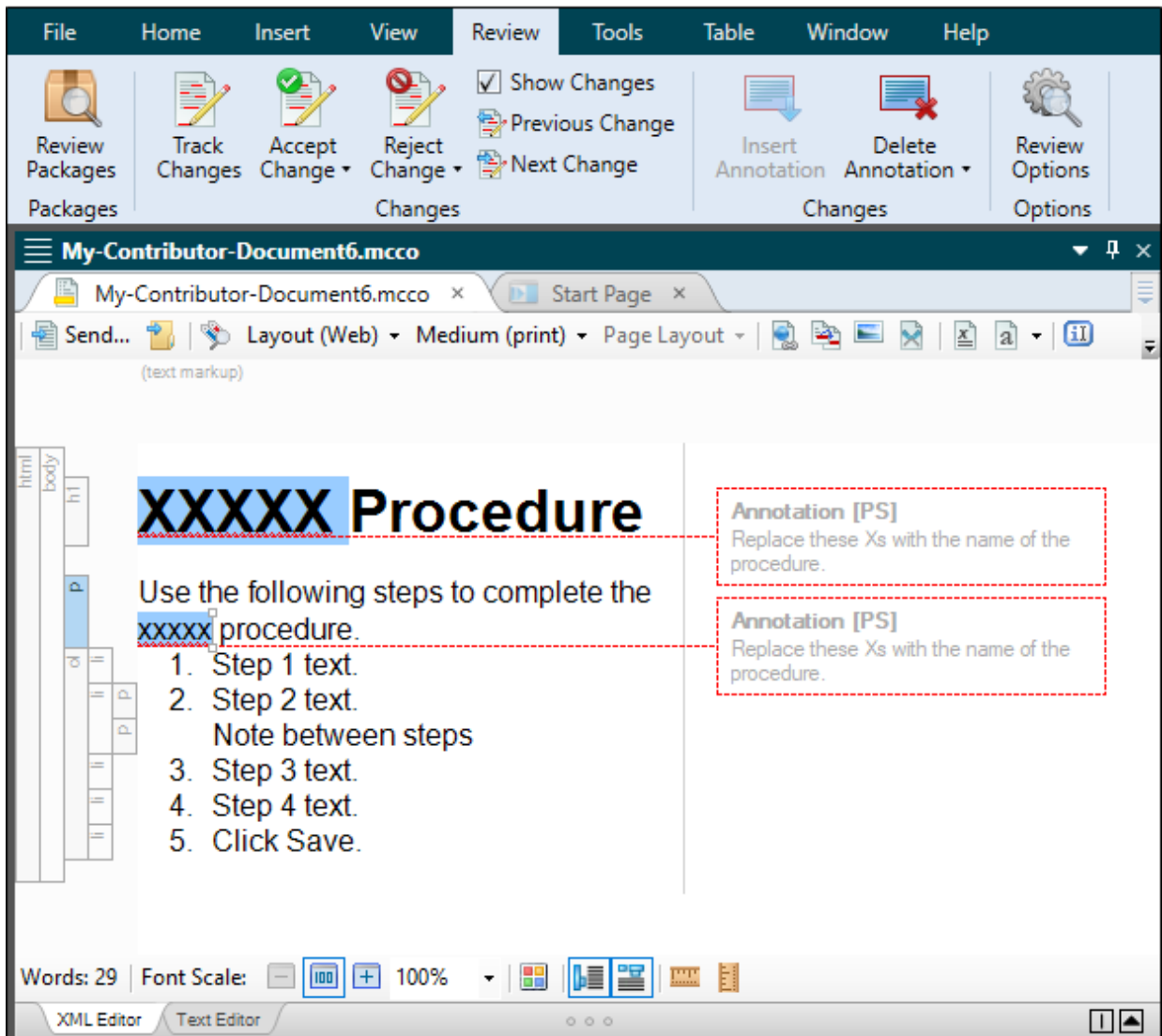
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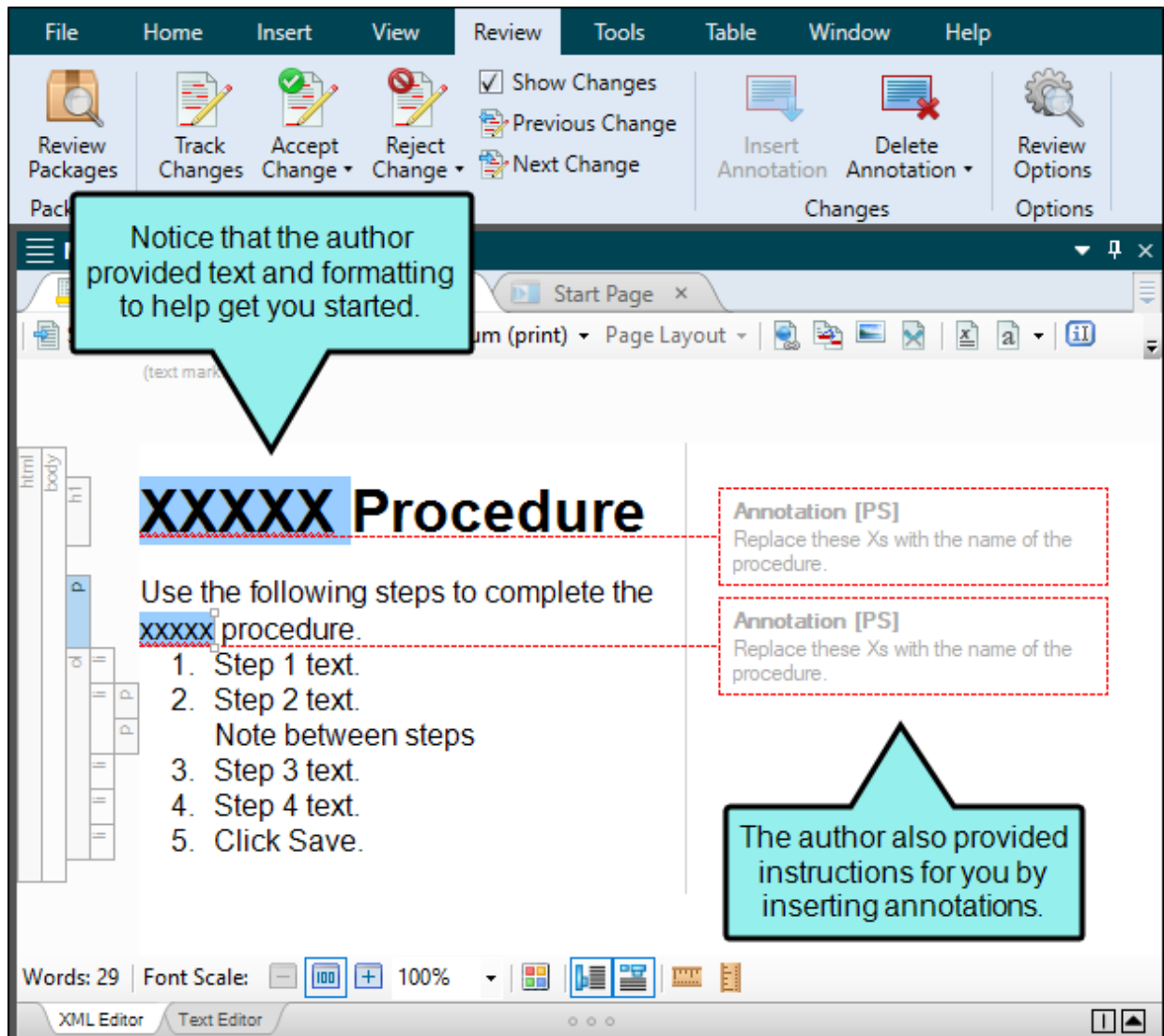
# Introduction

Following is the basic workflow if you are creating original content to be contributed to a MadCap Flare project.

1. **(Optional) Save Contribution Template** A Flare author might email you a contribution template for you to use when creating new documents. Contribution templates are simply files with certain settings already in place. They are a quick way to create and edit documents in a pre-set format that the author wants you to use. You can save a contribution template and then use it later whenever you need to create new documents to send to a Flare author. By saving the template file in a folder called "Documents\My Templates\Contributor" you can easily select it when you create a new document. See "Saving Contribution Templates" on page 9.

This is how a new topic created from a contribution template might look.





2. **Create** You can create new documents from the Contributor interface. See "Creating New Documents" on page 11.
3. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content in the document, but rather are intended for internal use between you and others.

4. After you finish a document, you can do the following.

- "Sending Documents to Authors" on page 34
- "Saving Documents" on page 36
- "Saving Documents as XPS Files" on page 39
- "Saving Documents as XHTML Files" on page 40
- "Printing Documents" on page 41



**NOTE** Because documents in Contributor are often used as part of Flare projects, you may sometimes see them referred to as "topics."



# Saving Contribution Templates


**Supported In:**




A Flare author might email you a contribution template for you to use when creating new documents. Contribution templates are simply files with certain settings already in place. They are a quick way to create and edit documents in a pre-set format that the author wants you to use. You can save a contribution template and then use it later whenever you need to create new documents to send to a Flare author. By saving the template file in a folder called "Documents\My Templates\Contributor" you can easily select it when you create a new document.

# I How to Save Contribution Templates

1. In the Documents folder on your computer, create a subfolder and name it **My Templates**. This subfolder can be used to hold all of the contribution templates that an author sends to you.
2. In the **My Templates** folder, create a subfolder and name it **Contributor**.
3. Open the email message that the Flare author has sent to you, with the contribution template as an attachment.
4. Double-click the attachment.
5. In the dialog that opens, click **Save**.
6. Navigate to the Documents\My Templates\Contributor folder and click **Save**.

 **NOTE** In addition to contribution template files (those with an .mccot extension), Contributor lets you select other types of files from the template folder as well. This includes document template files (.mcdoct), XHTML files (.htm), stylesheet files (.css), and page layout files (.mcpplt).

 **NOTE** Any templates that you created in the past for X-Edit can still be used in Contributor, but those files will need to be relocated to the new Contributor folder location in order to use them when creating new documents.

# Creating New Documents


Supported In:




You can create new documents (or topics) from the Contributor interface. If a Flare author has sent you a contribution template that you have saved, you can select that template when creating the new document.

# I How to Create a New Document


1. Select **File > New**.
2. Select a file to use as a basis for your new document, either from a template or from another existing file.
  - **Factory Templates** If you selected Factory Templates, you can choose from various templates provided by Contributor.
    - **Document.mcdoct** This template creates a basic document with a header and a little body text. You will end up with a document that has an .mcdoc extension. Select this option if you want to create a standalone document, rather than a contribution topic that will be sent to a Flare author.
    - **Topic.mccot** This template creates a very basic topic file with a header and a little body text. You will end up with a document that has an .mcco extension. An MCCO file is the same as an MCDOC file, with the exception that it indicates the file was created specifically for use as a contribution topic. If you create an MCCO document, you can quickly email it to Flare authors for incorporation into their projects.
    - **XHTML Document.htm** This template creates a very basic document with a header and a little body text. You will end up with an XHTML document that has an .htm extension. An HTM file is a good option if you want to post the file on the internet or an intranet, where others can view it in a browser window.

 **NOTE** You can quickly create a new XHTML document by pressing **CTRL+N** on the keyboard.


- **Stylesheet.css** This template creates a cascading stylesheet (CSS). You will end up with a file that has a .css extension, and it will open in the Stylesheet Editor. A CSS file can be used to create elements with formatting. You can then apply the formatted styles to content in a document to change how it looks.




 **NOTE** If a Flare author has provided you with a contribution template, chances are that you will use the styles provided by the author, rather than creating your own stylesheet.

- **Page Layout.mcpplt** This template creates a page layout file. You will end up with a file that has an .flppl extension, and it will open in the Page Layout Editor. A page layout is an element that you can create in order to determine page specifications (e.g., size, margins) and to apply certain content (e.g., headers, footers, page numbers) to your document for print-based output. Page layouts allow for easy configuration through the use of content frames, a snap-to grid, dragging and dropping, alignment features, and more.

 **NOTE** If a Flare author has provided you with a contribution template, chances are that you will use the page layout provided by the author, rather than creating your own page layout.

- **My Templates** If you selected My Templates, you can choose from any templates that you have saved in your "Documents\My Templates\Contributor" folder. This would likely include any contribution templates that a Flare author has sent to you. See "Saving Contribution Templates" on page 9.

 **NOTE** Any templates that you created in the past for X-Edit can still be used in Contributor, but those files will need to be relocated to the new Contributor folder location in order to use them when creating new documents.

- **New from existing** This lets you choose an existing file of the same type—that you've already created and stored somewhere—as a starting point for your new file. As with template files, your new file will take on all of the settings contained in the file you select. To use this option, click the browse button , use the Open File dialog to find a file, and double-click it.
3. In the **Folder** field, select a folder for the new document. You can browse for a folder by clicking the browse button . The Open File dialog, will open, allowing you to find a file.
  4. In the **File Name** field, enter a file name.
  5. Click **OK**.
  6. For most document types, add any content, formatting, or annotations as necessary. If you created a stylesheet or page layout, you can use the respective editors to make changes to those types of files as well.
  7. Click  to save your work.

# Tracking Changes

For documents in Contributor, you can track changes and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar. Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTM, XPS, or PDF files).

When this feature is enabled, every change to the document—along with the user who performed the change—will be stored in the document’s markup. For example, deleted text won’t actually be removed from the document, but will instead be marked as deleted in the code. However, if the change is accepted, the text will be removed from the document.

When a Flare author sends you a review package file (FLTREV) and you edit the content files within it, your changes are automatically tracked so that the author can easily see the changes you made. You cannot disable the track changes feature for these types of documents.

**This chapter discusses the following:**

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# Examples

The following images show how tracked changes work in Contributor.

The sidebar indicates what has changed and who did it, by displaying each user's initials.

The screenshot shows a document editor interface. The main text area contains the following content:

This ~~topic~~ is a ~~very~~ good place to explain the high level concepts that allow a user to be successful with FictionSoft. ~~You might include~~ the following:

- Overall work ~~flow~~ for FictionSoft.
- Important concepts necessary to be successful
- ~~Links to video tutorials~~
- Special language or jargon ~~to use~~ need to understand

The sidebar on the right shows the following changes:

- Deleted [AL] (blue dashed box)
- Added [AL] (blue dashed box)
- Added [PS] (red solid box)
- Deleted [PS] (red dashed box)
- Added [JK] (green dashed box)

Callouts explain the changes:

- A blue callout points to the word "topic" and the word "very", with a corresponding "Deleted [AL]" and "Added [AL]" entry in the sidebar.
- A red callout points to the phrase "You might include", with a corresponding "Added [PS]" entry in the sidebar.
- A red callout points to the word "flow" in the first bullet point, with a corresponding "Deleted [PS]" entry in the sidebar.
- A green callout points to the phrase "Links to video tutorials", with a corresponding "Added [JK]" entry in the sidebar.

In this example there are changes in three colors (blue, red, and green), which means three different users have made changes.



This ~~topic~~ is a ~~very~~ good place to explain the high level concepts that allow a user to be successful with FictionSoft. ~~You might include~~ the following:

- Overall workflow for FictionSoft
- Important successful
- ~~Links to v~~
- Special language or jargon ~~that~~ a user will need to understand
- Any other information ~~that~~ a user would need

Deleted [AL]  
Added [AL]  
Accept Insertion  
Reject Insertion  
Deleted [PS]  
Added [JK]  
Deleted [PS]  
Deleted [JK]

By right-clicking on a change, you can choose whether to accept or reject it.

# I Enabling Track Changes

Supported In:



For documents that you create in Contributor, you can track changes and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar.

When a Flare author sends you a review package file (FLTREV) and you edit the content files within it, your changes are automatically tracked so that the author can easily see the changes you made. You can not disable the track changes feature for these types of documents.

## How to Enable the Track Changes Feature

1. Open the document that you created (not one you received for review).
2. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon Select Review > Track Changes.**
  - **Keyboard Shortcut Press CTRL+SHIFT+E.**

# Hiding and Showing Changes and Annotations

Supported In:



You can hide or show tracked changes and annotations in the active document.

## How to Hide and Show Changes and Annotations

1. Open the document or topic.
2. Select **Review > Show Changes**.

# Changing Your User Name and Initials

Supported In:



When you first install and launch Contributor, your login user name is captured and stored in the Review tab of the Options dialog (**File > Options**). The first two letters of the user name are also stored as your initials. This information is employed whenever you use the track changes and annotations features.

For example, if you insert an annotation in a topic, your initials are displayed at the beginning of the comment so that other users know where the annotation came from.

You can always change your Contributor user name or initials to something else.

☆ **EXAMPLE** Your login user name is "johndoe." In that case, your initials are stored automatically as "jo." Although you want to keep your user name as is, you want to change the initials to "jd," which other users will more readily associate with you. Therefore, you open the Options dialog (**File > Options**) and use the Review tab to change only your initials.

## How to Change the User Name and Initials for Reviews

1. Select **Review > Review Options**.
2. Change the text in either the **User Name** or **Initials** fields.
3. Click **OK**.

# Changing the Display of Tracked Changes

Supported In:



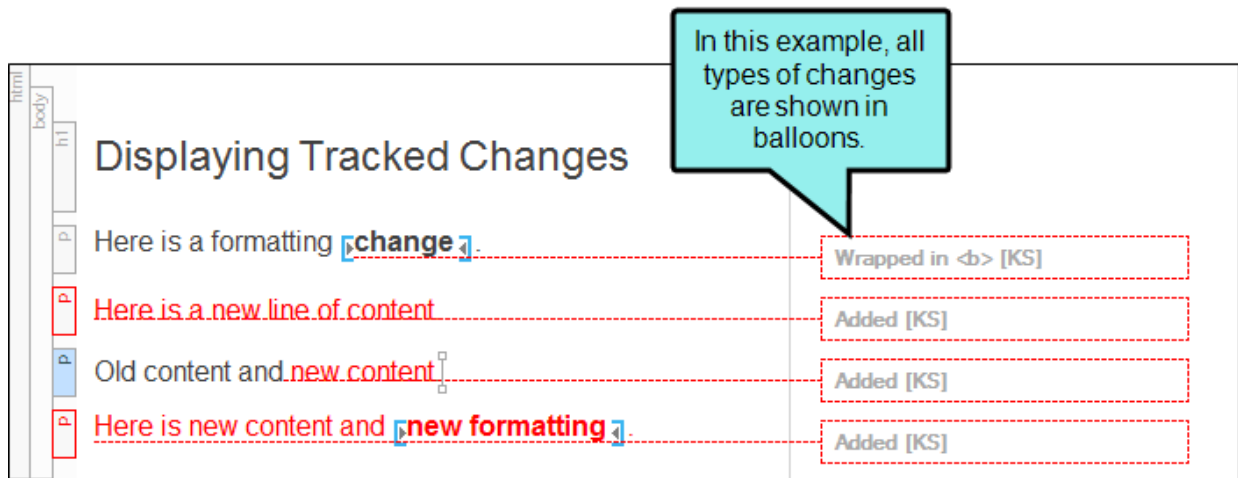
You can change the way tracked changes are displayed in the interface (e.g., in balloons, inline). You can also enable or disable change bars.

## How to Change the Display of Tracked Changes

1. Select **Review > Review Options**.
2. In the **Tracked Change Display** section, choose any of the following.

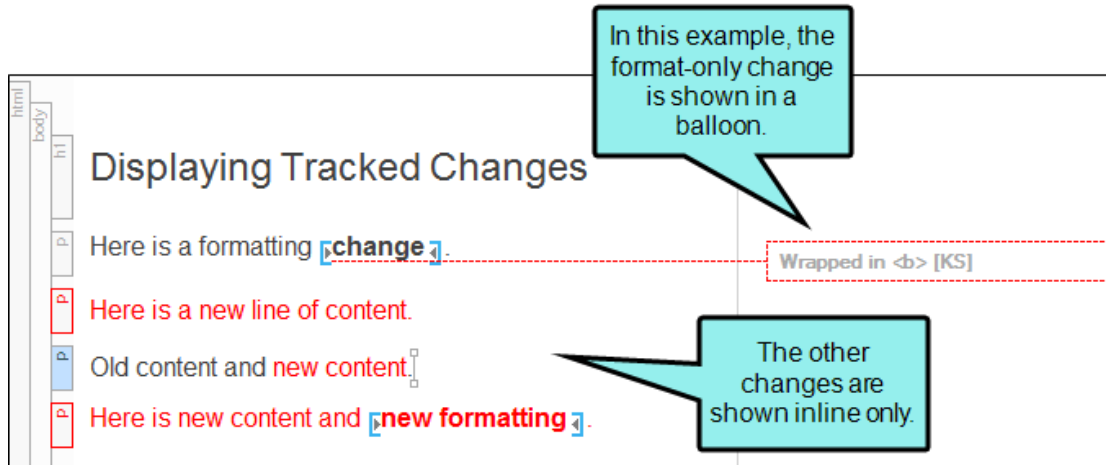
### TO DISPLAY ALL CHANGES IN BALLOONS

If you select this option, all changes—text and formatting—will be shown in balloons in the sidebar.



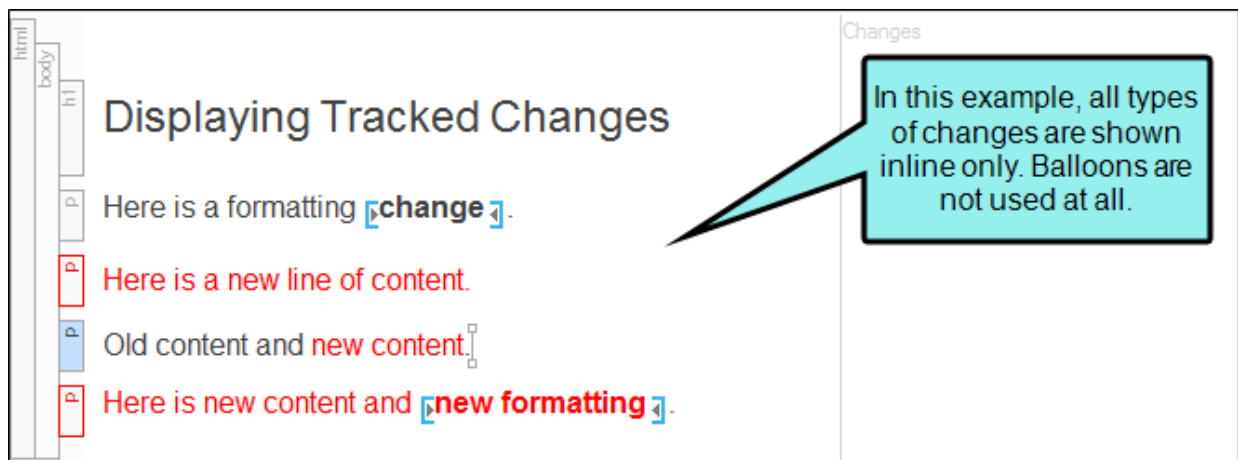
## TO DISPLAY ONLY FORMAT CHANGES IN BALLOONS

If you select this option, changes that include content only (or content plus formatting) will be shown inline. But changes that contain formatting modifications only will be shown in balloons in the sidebar.

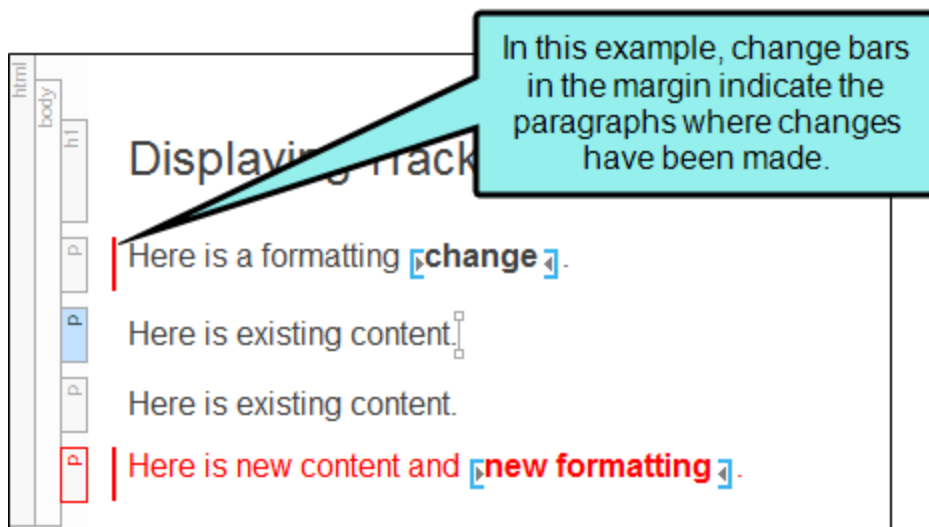


## TO DISPLAY ALL NON-FORMAT CHANGES INLINE


If you select this option, all text changes will be shown inline. Balloons are not used.



3. In the **Change Bar** section, select whether or not you want to turn on change bars. If you turn on change bars, a bar appears on the left side of the paragraph where a change has been made. Change bars appear in PDF output and the XML Editor.



4. Click **OK**.

 **NOTE** In order to see your selection in action, make sure you have chosen to show tracked changes. See "Hiding and Showing Changes and Annotations" on page 19.

# Changing the User Color for Reviews

Supported In:



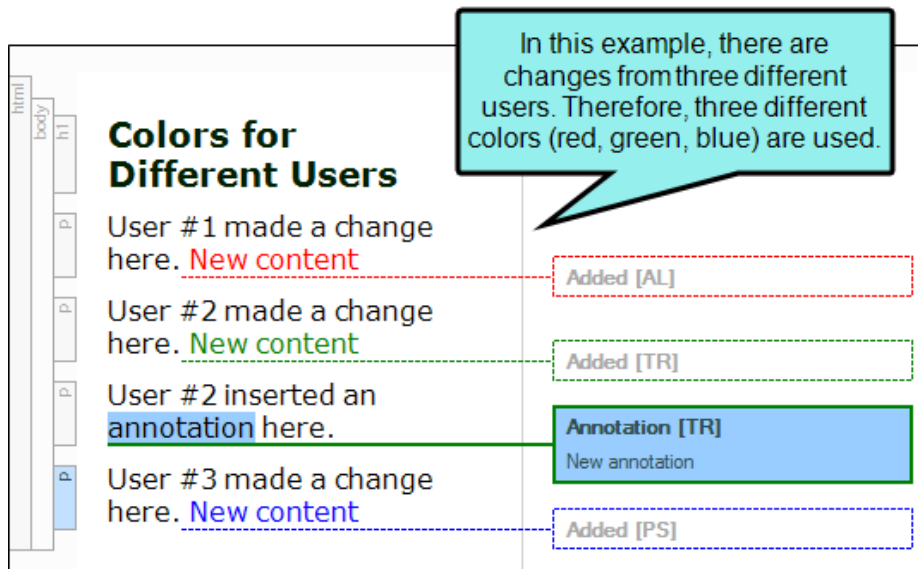
The tracked changes and annotations for each user can be shown in a separate color. You also have the option of choosing a specific color for all users.

## How to Change the User Color for Reviews

1. Select **Review > Review Options**.
2. In the **User Colors** section, choose one of the following.

### TO USE A DIFFERENT COLOR FOR EACH USER

Select this option if you want Contributor to automatically assign a different color for each user.





## TO USE THE FOLLOWING COLOR FOR ALL USERS

Select this option if you want all changes, regardless of the user, to display in the same color. After you choose this option, click the down arrow below to select a color.

In this example, there are changes from three different users. But the same color (in this case, red) is used to display all of the changes, regardless of the user.

### Colors for Different Users

User #1 made a change here. **New content**

User #2 made a change here. **New content**

User #2 inserted an **annotation** here.

User #3 made a change here. **New content**

Added [AL]

Added [TR]

Annotation [TR]  
New annotation

Added [PS]

3. Click OK.

# Finding Changes

Supported In:



You can use navigation buttons in the Review ribbon to quickly navigate to the previous or next tracked change or annotation in the file.

## How to Find Changes

1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. Select **Review > Next Change** or **Review > Previous Change**.

# I Accepting or Rejecting Tracked Changes

Supported In:



You can right-click on tracked changes and use a context menu to accept or reject them individually. You can also use options in the interface to accept or reject each tracked change or all tracked changes in a file. The reject option also removes annotations.

When you track changes, every change to the document—along with the user who performed the change—will be stored in the document’s markup. When a change is accepted or rejected, all markup designating it as a change is removed. When all changes in the document are resolved, they will not contain any history of changes made and can be considered ready for output.

## How to Accept or Reject Tracked Changes

1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. You can perform any of the following tasks.

### **TO ACCEPT ALL CHANGES IN THE DOCUMENT**

Select **Review > Accept Change > Accept All Changes**.

## TO ACCEPT A SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to accept. Select **Review > Accept Change**.
- OR
- **Right-Click** Right-click on the change you want to accept. From the context menu, select **Accept [Type of Change]**.


## TO REJECT ALL CHANGES IN THE DOCUMENT


Select **Review > Reject Change > Reject All Changes**.

## TO REJECT A SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to reject. Select **Review > Reject Change**.
- OR
- **Right-Click** Right-click on the change you want to reject. From the context menu, select **Reject [Type of Change]**.

4. Click  to save your work.

 **NOTE** Tracked changes are visible only in the editor in Contributor. They are not visible when viewing any output created from the document (e.g., saving to HTML, XPS, or PDF files).

 **NOTE** This feature is not supported for MadCap Lingo review package (LIREV) files.

# Annotations

Supported In:



You can insert an annotation (comment) into a document. These annotations do not become part of the actual content, but rather are intended for internal use between you and others.

**This chapter discusses the following:**

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# I Inserting Annotations

Following are steps for inserting annotations.

## How to Insert an Annotation

1. Open the document or topic.
2. Highlight the content that you want to associate with the annotation, or place your cursor on it.

 **NOTE** Do not highlight more than one paragraph.

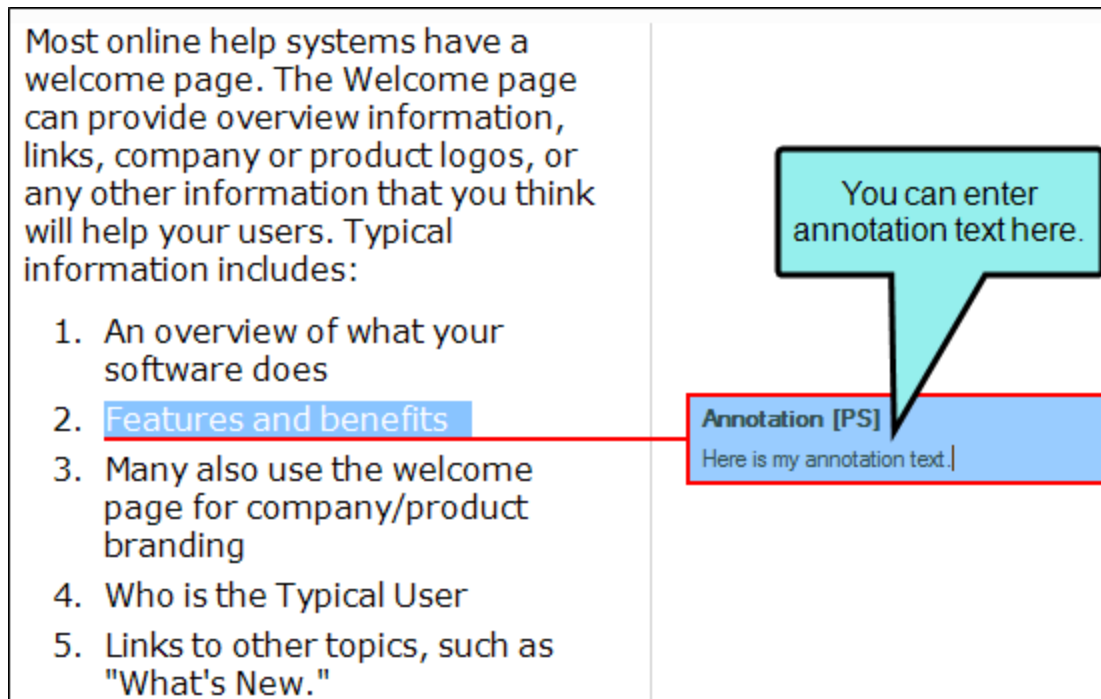
3. Do one of the following, depending on the part of the user interface you are using:

- **Ribbon Select **Review** > **Insert Annotation**.**
- **Right-Click** If the track changes feature is enabled, you can right-click and select **Insert Annotation**.

A rectangle extends to a sidebar on the right, with a line pointing to the selected content. This rectangle will hold the annotation text after you type it.

Also, the selected content is shaded, indicating that the annotation refers to that text. However, the shading will not be displayed in the output; it is for internal use only.

4. Type your comment in the annotation rectangle.




The screenshot shows a help system interface. On the left, there is a text block followed by a numbered list. The second list item, "Features and benefits", is highlighted in blue. A red line connects this item to a blue rectangular annotation box on the right. The annotation box contains the text "Annotation [PS]" and "Here is my annotation text." A light blue speech bubble points to the annotation box with the text "You can enter annotation text here."


Most online help systems have a welcome page. The Welcome page can provide overview information, links, company or product logos, or any other information that you think will help your users. Typical information includes:

1. An overview of what your software does
2. Features and benefits
3. Many also use the welcome page for company/product branding
4. Who is the Typical User
5. Links to other topics, such as "What's New."

You can enter annotation text here.

Annotation [PS]  
Here is my annotation text.]


5. Click  to save your work.

 **NOTE** When you insert an annotation, your initials are displayed next to it. The initials are the first two letters of your login user name. However, you can change the user name and initials (for use in Contributor) to something else. For more information see the online Help.

# I Editing Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use. You can easily make changes to an annotation.

## How to Edit Annotations


1. If you do not see annotations in the editor, select **Review > Show Changes**.
2. Click in the rectangle containing the annotation text and make your changes.
3. Click  to save your work.



# I Deleting Annotations

You can delete annotations that have been inserted into a document or topic.

## How to Delete Annotations


1. Open the document or topic.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 19.
3. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon** Select the annotation you want to delete. Select **Review > Delete Annotation**.
  - **Right-Click** Right-click on the annotation you want to delete, and from the context menu, select **Delete Annotation**.
4. Click  to save your work.

# Sending Documents to Authors

Supported In:




You can send a finished contribution document (MCCO file) to a Flare author so that it can be incorporated into a larger project. You can do this in various ways. Work with the author to determine how he or she wants to be notified and receive files. If the author is using a built-in email feature, this might simply entail clicking a **Send** button in the Contributor interface (see "How to Send a New Document to an Author" on the next page).


 **NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Contributor and Outlook. If you are using 64-bit Contributor, you need 64-bit Outlook. Likewise, if you are using 32-bit Contributor, you need 32-bit Outlook.

# I How to Send a New Document to an Author

The following steps include the integrated Outlook email method. If your systems are not set up for this feature, you can use one another method (e.g., or save to your computer and manually email).

1. Create or open the MCCO file.

 **NOTE** If you have just created a new document, you must save it before you can send it.

2. In the local toolbar of the editor click .
3. Complete the email message with the address of the recipient(s) and any message text. Then send it.

# Saving Documents

Supported In:



After creating a new document, you can save it in various formats.

**This chapter discusses the following:**

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# I Saving Documents as PDF Files

Short for "Portable Document Format," PDF is an open standard format for electronic documentation exchange invented by Adobe. PDF files are used to represent a two-dimensional document in an device- and resolution-independent fixed-layout format.

# I How to Save Documents as PDF Files

1. Create or open a document.
2. Select **File > Save > Save To**.
3. In the dialog that opens, navigate to the folder where you want to store the PDF document.
4. In the **File name** field, enter a name for the PDF document.
5. Click in the **Save as type** field and select **PDF File (\*.pdf)**.
6. Click **Save**.

# I Saving Documents as XPS Files

After creating a new document, you can save it as an XPS file. Microsoft's XML Paper Specification (XPS) is a document format with a markup language that is a subset of XAML for Windows Presentation Foundation. XPS is an alternative to Adobe's Portable Document Format (PDF).

## How to Save Documents as XPS Files

1. Create or open a document.
2. Select **File > Save > Save To**.
3. In the dialog that opens, navigate to the folder where you want to store the XPS document.
4. In the **File name** field, enter a name for the XPS document.
5. Click in the **Save as type** field and select one of the following options.
  - **XPS File (Editable) (\*.xps)**
  - **XPS File (Editable. Non-Standard Extension) (\*.exps)**
6. Click **Save**.

# I Saving Documents as XHTML Files

After creating a new document, you can save it as an XHTML file.

## How to Save Documents as XHTML Files

1. Create or open a document.
2. Select **File > Save > Save To**.
3. In the dialog that opens, navigate to the folder where you want to store the XHTML document.
4. In the **File name** field, enter a name for the XHTML document.
5. Click in the **Save as type** field and select **XHTML File (\*.htm)**.
6. Click **Save**.



# Printing Documents

Supported In:



You can print a document directly from the Contributor interface.

## I How to Print Documents

1. Create or open a document
2. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon Select File > Print.**
  - **Keyboard Shortcut Press CTRL+P** on your keyboard.

The Print dialog opens.

3. Complete the options in the Print dialog.
4. Click **OK**.

# PDFs

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

## I Cheat Sheets

*Shortcuts Cheat Sheet*

## I User Guides

*Getting Started Guide*

*Contributor Workflow Guide*

*Review Workflow Guide*

*What's New Guide*