madcap software

USER GUIDE

MADCAP FLARE ONLINE

Branding Guide

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CHAPTER 1

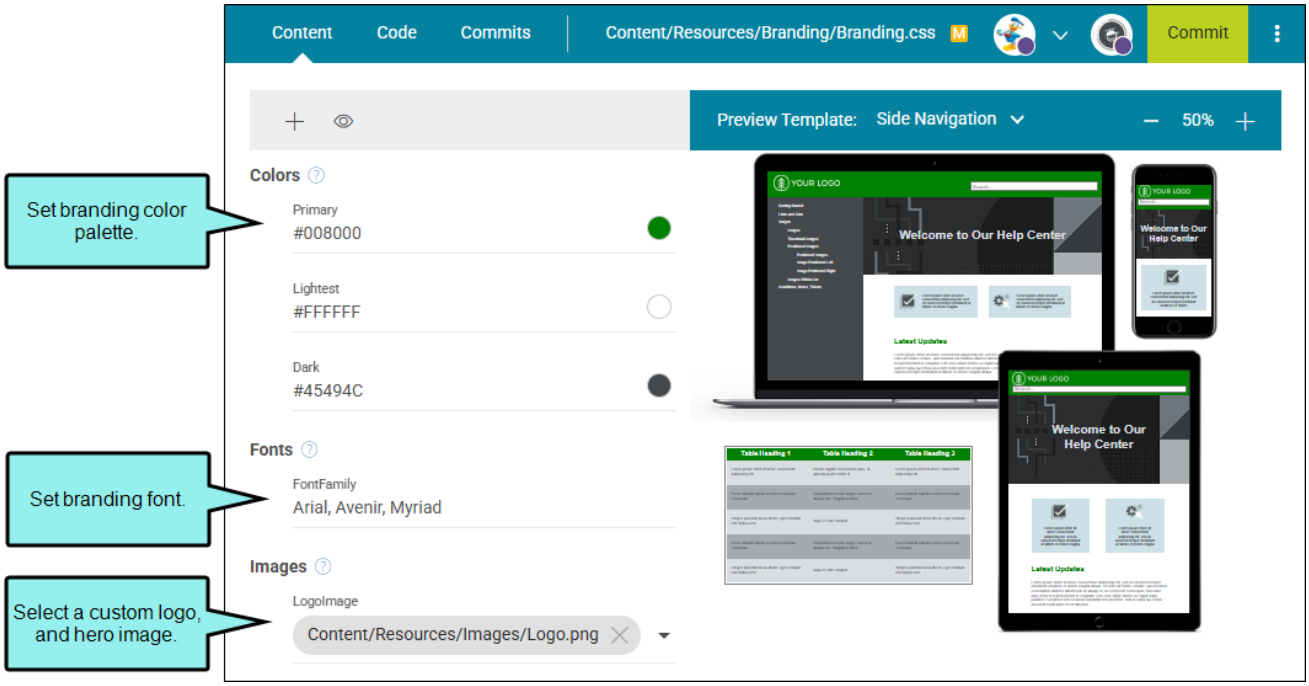
Introduction

Supported In:



The branding feature provides a convenient way to set common branding elements (e.g., logo, hero image, font, color palette) to match the output with your company's brand.

- If you are setting up a new project You can set up branding when creating a new project using the Create New Project Wizard in Flare Online. The advantage of doing this is that your basic branding design is established from the get-go.
- If you already have an established project You can leverage the benefits of the branding feature. For example, you can add a new branding stylesheet to a project in Flare Online.



Branding is already set up in Flare's factory project templates. The branding colors, font, and image settings are tied to the project's regular stylesheet and various files and elements that are used to produce the final output. This means you don't have to become an overnight expert in cascading stylesheets (CSS) to make your output look good. Therefore, the best and easiest way to take advantage of branding is to have a project that is based on one of those templates and then change the branding settings according to your needs.

NOTE Collaborative authoring is supported for the Branding Editor. This means that multiple authors can open the same editor, make changes, and then retain all sets of updates when done.

NOTE For more information about branding and ways you can interact with it in projects and templates, see the Flare Desktop Help system.

Main Activities

- "Adding Branding Stylesheets" on page 8
- "Editing Branding Stylesheets" on page 13
- "Associating a Branding Stylesheet at the Project Level" on page 28
- "Associating a Branding Stylesheet at the Target Level" on page 30

Other Activities

- "Renaming Branding Stylesheets" on page 33
- "Deleting Branding Stylesheets" on page 34

CHAPTER 2

Main Activities for Branding

Some activities are particularly common and important when it comes to this feature.

This chapter discusses the following:

Adding Branding Stylesheets 8

Editing Branding Stylesheets 13

Associating a Branding Stylesheet at the Project Level 28

Associating a Branding Stylesheet at the Target Level 30

Adding Branding Stylesheets

In many cases, you will already have a branding stylesheet that was automatically added when you created a project. However, if you want to add an additional branding stylesheet, or if you are a legacy Flare author with a project that pre-dates the branding feature, you can use the following steps to create a new branding stylesheet.

Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- 

  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

- 

  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

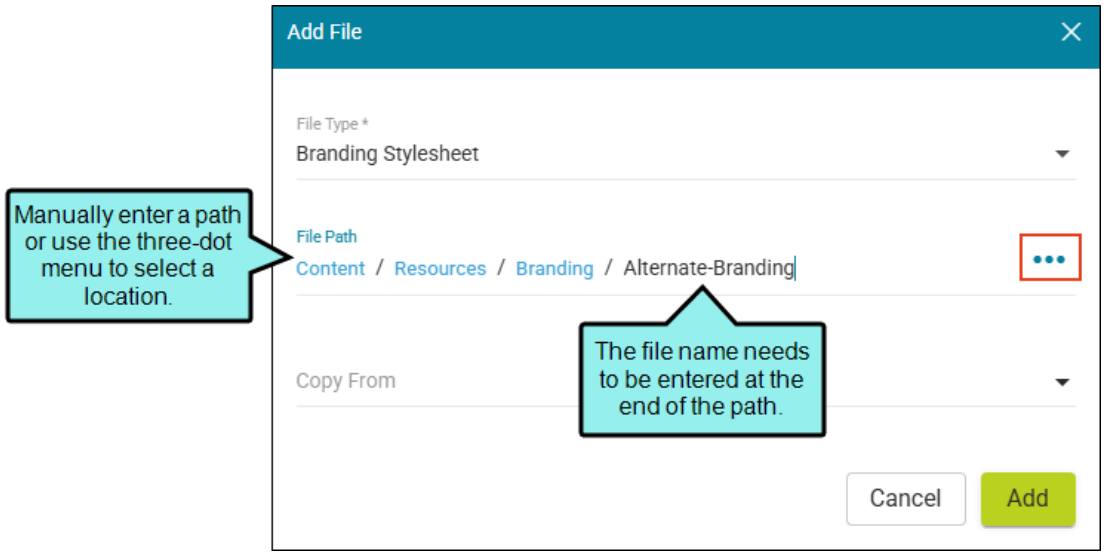
How to Add a Branding Stylesheet

1. Open a project, and select the **Workspace** tab at the top.
2. From the main toolbar, click + to add a new file.

   > NOTE Alternatively, you can upload an external file into your project.

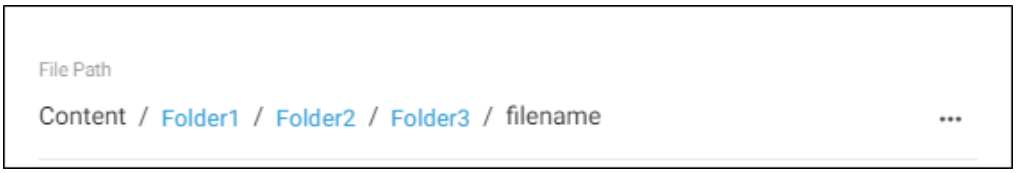
3. In the Add File dialog, click the **File Type** drop-down, and select **Branding Stylesheet**.
4. In the **File Path** field, enter a path and a name for the new file. The recommended path for branding stylesheets is Content > Resources > Branding. However, you can add the stylesheet anywhere in the Content folder that you want.

   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.

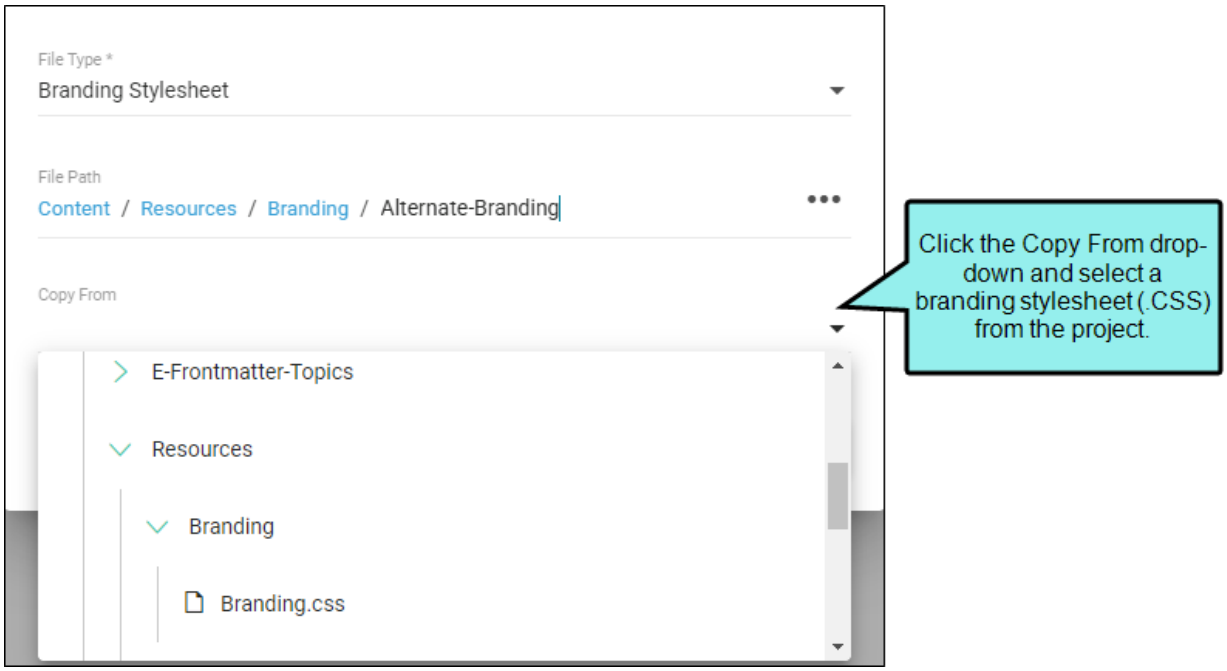
For example, in the Add File dialog, a file path contains several folders (indicated by blue lettering) before the filename.



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

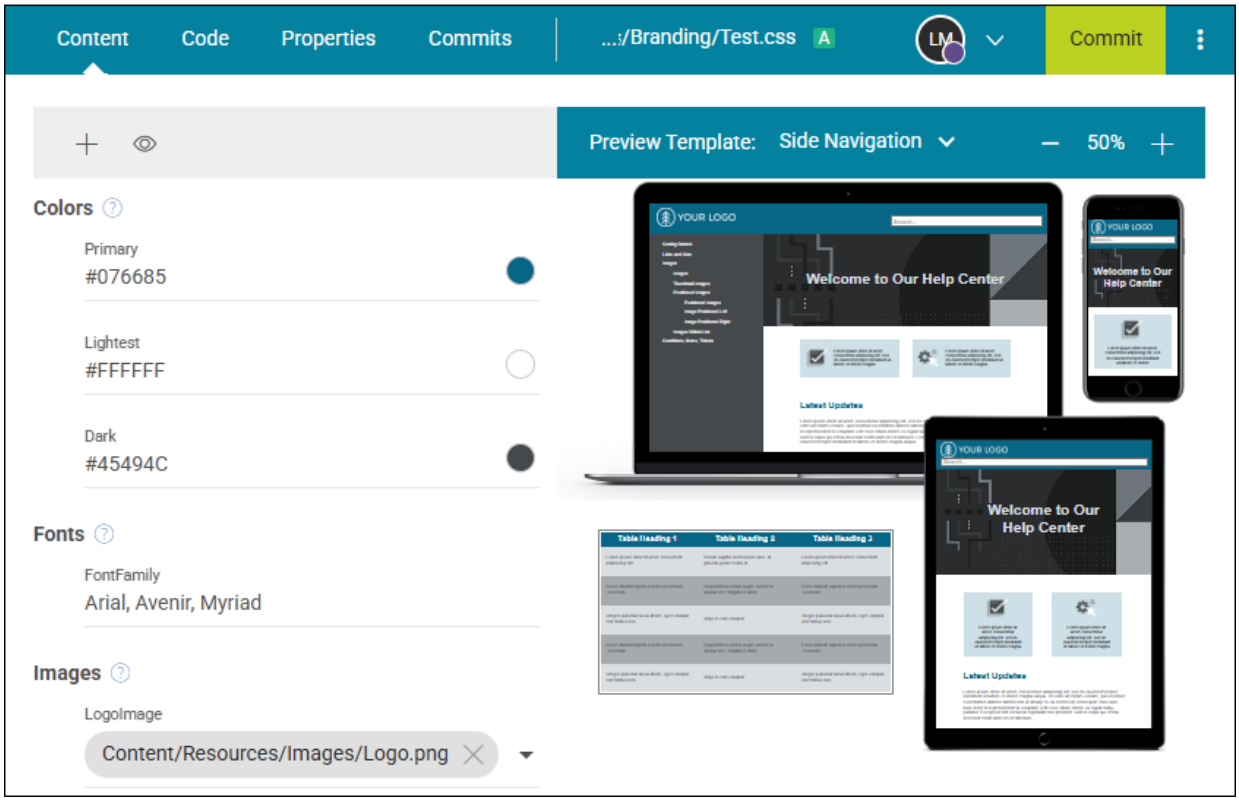


5. (Optional) In the Add File dialog, from the **Copy From** drop-down, you can select an existing branding stylesheet file to use. This copies all the settings from the existing file to the new file, providing a base of settings to start with for your file. If you choose not to do this, then your new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



6. Click **Add**. A new file is created and opens in the Branding Stylesheet Editor. You can edit the stylesheet settings, or you can skip that for now and commit your changes.

Example of the Branding Stylesheet Editor.



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

NOTE With a new branding stylesheet, you might need to connect it with other files or elements before it will work in the output. For example, if you want to pair separate branding stylesheets in the same project to different products that you are documenting, you can associate each branding stylesheet with a corresponding target. For details about advanced customization of branding in a project, see the Flare Desktop Help system.

Editing Branding Stylesheets

You can open a branding stylesheet and edit the settings. The elements in the project that are associated with those branding variables will automatically display the changes when you build and view the output.

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- 

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- 

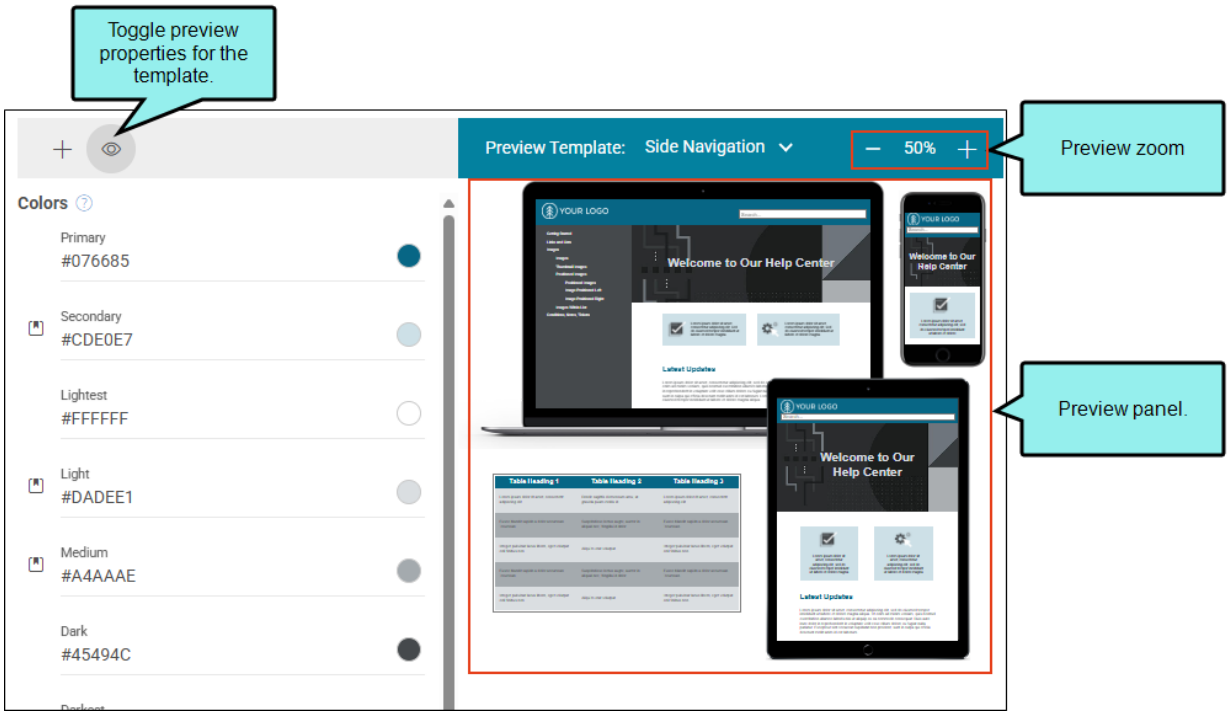
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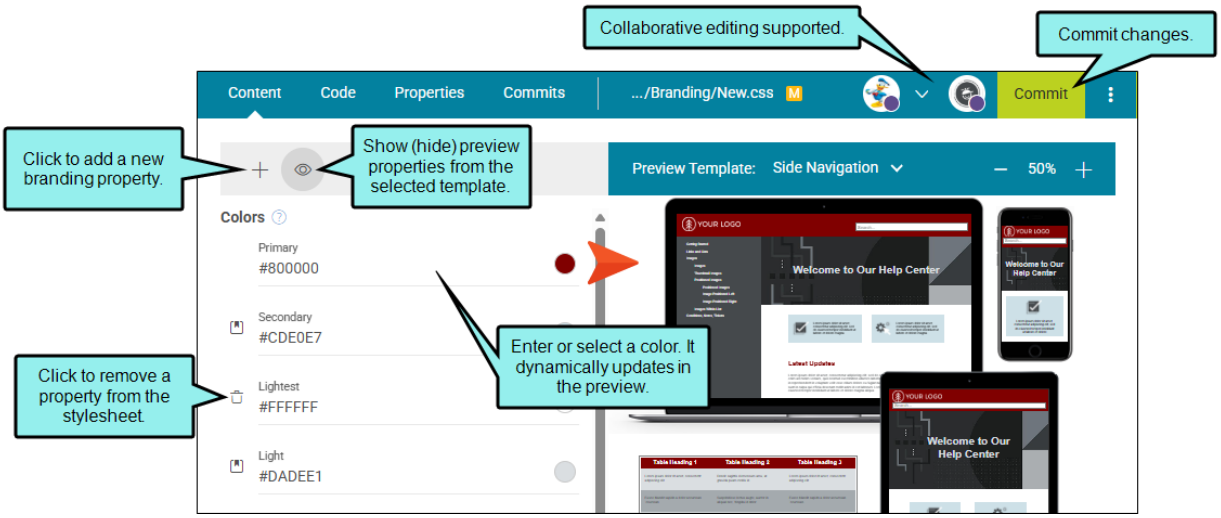
How to Edit a Branding Stylesheet

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, expand the existing folders to navigate to a file. You can also click  to search for a specific file.

   The editor displays on the right side of the page. You can interact options such as increasing or decreasing the zoom for the preview, and toggling default style properties of the selected template.



3. Click in the editor to update branding elements (e.g., color palette, logo, hero image, font), and see your choices update in the Preview. You can also manage branding properties in your stylesheet.



> **TIP** From the left side of the page, if you right-click the branding stylesheet, you can open it from the popup. From this menu, you can also do other tasks.

4. You can choose branding colors, a font family, logo, and hero image to apply to your project.

COLORS

You can type a hexadecimal number (e.g., #000000) directly in the field, or you can click the circle to the right of the field to open a popup. From the popup, you can click to select a color.

- **Primary** The main brand color. For example, the primary color might impact H1 headings for some templates.
- **Secondary** Another brand color.
- **Lightest** The lightest color (e.g., white, off-white) for ancillary purposes.
- **Light** A light color for ancillary purposes.
- **Medium** A medium color for ancillary purposes.
- **Dark** A dark color for ancillary purposes.
- **Darkest** The darkest color (e.g., black, dark gray) for ancillary purposes.

NOTE The branding colors are designed to progress from lighter to darker shades. The colors are used for the preview and throughout the rest of the project, so use caution when changing a color from one extreme to another. For example, if you change a lighter element to a darker color, this could display dark content on top of other dark content. For the best results, adhere to the gradient progression.

TIP You can change the colors from a light theme to a dark mode by selecting the reverse type of color that the color field suggests. For example, for the Lightest field you would select the darkest color and the Darkest field would be the lightest. It is a good idea to test the colors in the output to make sure they look the way you intend.

FONT

- FontFamily You can type a specific font family (e.g., Arial, Tahoma, Verdana) directly in the field. If you clear the field and click it, you can select from a variety of font families.

  In addition, you can type a series of fonts (i.e., a font set) into the field, separated by commas. A font set is a collection of font families. You can create a font set in order to designate the substitute fonts to use when the preferred font is not available on the user's computer. If the first (i.e., preferred) font family in the set is not found on the user's computer, the second font family in the set is used. If the second font family is not found, the third font family is used, and so on. Because different types of computers and operating systems do not always have the same fonts, it is recommended that you try to include fonts that cover all of the circumstances.

EXAMPLE You want to use Arial if possible. Therefore, you list that font type first in the font set. Next you might add a similar font that is found on Mac computers, such as Helvetica, since Macs might not use Arial. And third, you might add a generic font type, such as Sans-serif. So in the end you would enter `Arial, Helvetica, Sans-serif`.

NOTE When using a factory project template, a font family is automatically set for the body style in the regular stylesheet. All lower elements in the hierarchy use it. To use a different font for an element within body, you can change it in the regular stylesheet. For example, you might want to update the h2 and h3 styles to a different font (other than the inherited body style).

IMAGES

- HeroImage The main hero image shown on the home or cover page of the output. This lets you select an image for the background. Click in the field to select an image file. The default banner image at the top of online output, or the large image on a PDF title page, is replaced with the selected hero image file.
- LogoImage The main logo of your company or product. This lets you select an image for the background. Click in the field to select an image file. The default logo is replaced with the selected logo image file. A raster image (e.g., PNG) is suitable for online output.
- LogoImagePrint The main logo of your company or product, intended for print-based output. This lets you select an image for the background. Click in the field to select an image file. Templates that include a PDF allow you to select a vector image (e.g., EPS, SVG), which is made up of geometric elements and provides more clarity for printed output. If you use a raster image it might appear pixelated in the output.
- BigLogo The main logo of your company or product. This is used only in Flare's Brochure factory template to display a large version of the logo in one of panels. By default it is set to use a PNG file, but you can select a different file format, including a vector image.

NOTE By default, image properties link to images from application resources.

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

NOTE If you make branding changes, the state of your stylesheet changes to In Progress (meaning that the file is uncommitted). It stays in that state until it is committed to the repository. You also have the option to set your user status for the branding stylesheet to In Progress or Ready to Commit.

How to Add a Branding Property

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, expand the existing folders to navigate to a file. You can also click to search for a specific file.
3. In the Branding Stylesheet Editor's local toolbar, click .
4. Complete the following in the Add Branding Property dialog.
    a. **Type** From the drop-down, select the type of property to add to the branding stylesheet (i.e., Color, Custom, Font, Image).
    b. **Name** Enter or select a name for the property.
    c. **Value** Enter or select a value for the property. If you are adding a color, you can click for the color picker. If adding a font or an image, click the field to select a value from a drop-down. If adding a custom property, enter a value (e.g., another branding color that reinforces your organization's identity).



5. Click **Add**. The property displays in the Branding Stylesheet Editor.
6. Click **Commit**.
7. In the Create New Commit dialog, enter a **Commit Message**.
8. Click **Commit**. (Or click **Cancel**, to back out of the process.)

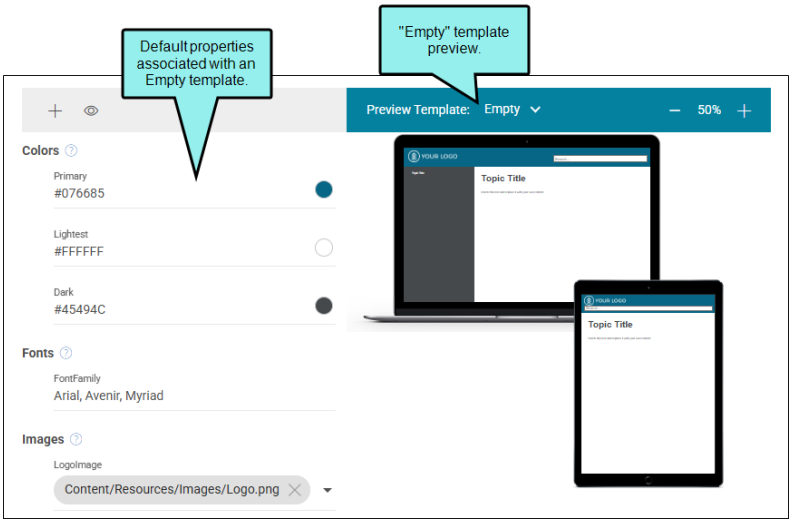
How to Add a Property from Another Template

When you preview another template in the Branding Stylesheet Editor, you can select branding elements that are not part of your project and easily add them to your stylesheet.

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, with **All Files** showing, navigate to and select a branding stylesheet file.
3. From the **Preview Template** drop-down, select another template to preview how your branding would look using that template.

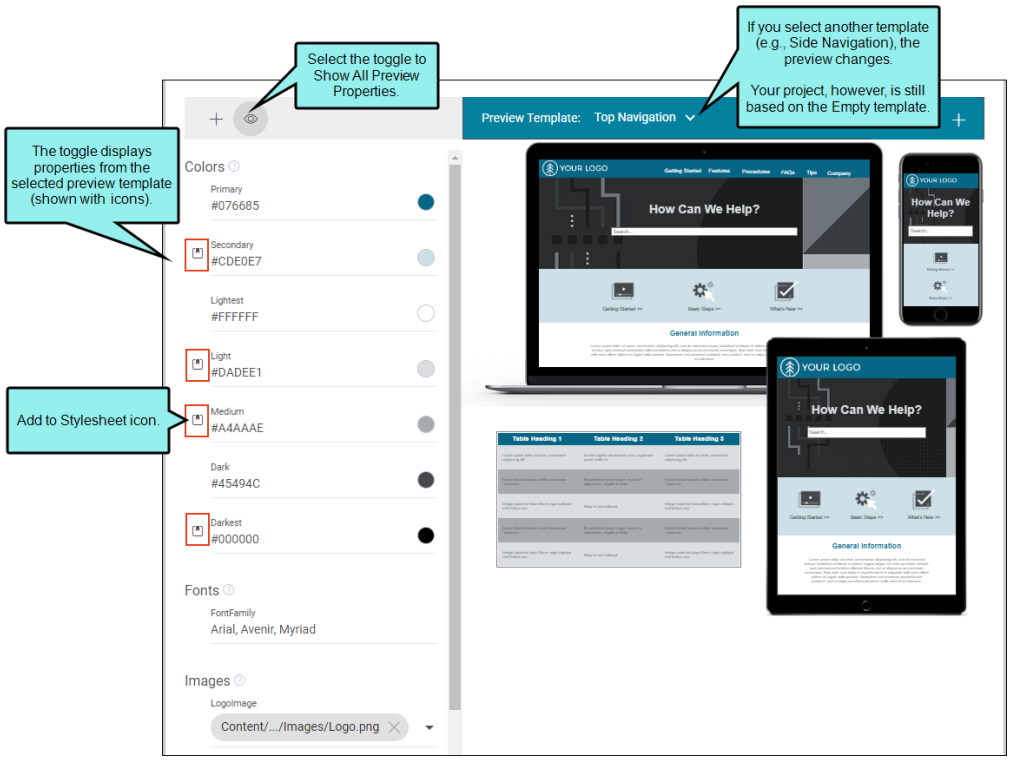
   When you create a project, a template is selected. Factory templates include online, print, or tutorials (e.g., eLearning, Side Navigation, Top Navigation and PDF, Empty). The branding properties from the template selected display by default in the editor.

   ☆ EXAMPLE If you add a branding stylesheet to your project with an "Empty" template, you will see minimal branding options in the Branding Editor for colors, fonts, and images.



4. In the local toolbar, click . If the selected template includes branding properties that are not in your project, an icon displays next to those properties.

EXAMPLE If you select the toggle, the editor indicates colors, fonts, or images defined in the selected template in the preview, but not included in your current project.



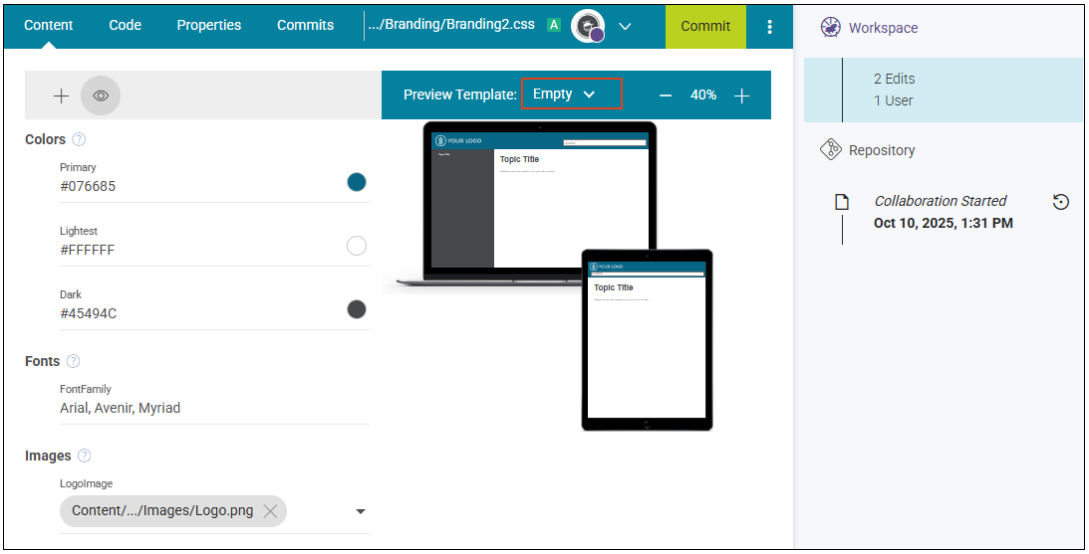
5. Click (Add to Stylesheet), to add the property to your branding stylesheet. Properties that are added to your stylesheet are saved with their default values, but you can change those values if you want. You can then apply a new property to your project.

NOTE Changing a value of a property defined in the template will add the property to the stylesheet automatically—even if you do not select Add to Stylesheet.

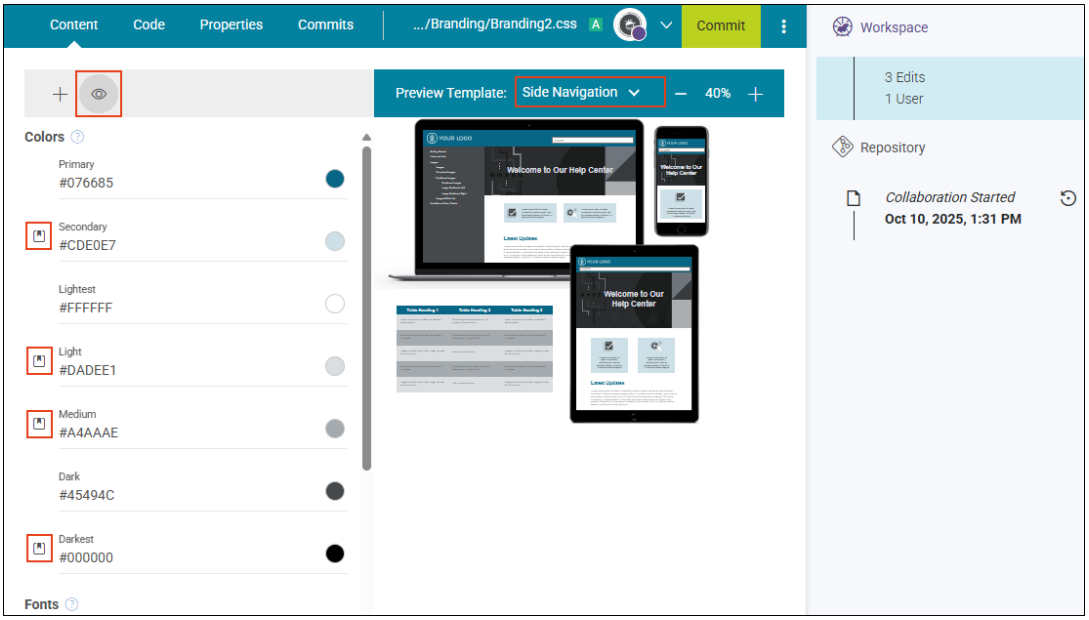
6. Click **Commit**.
7. In the Create New Commit dialog, enter a **Commit Message**.
8. Click **Commit**. (Or click **Cancel**, to back out of the process.)

NOTE If you click for a property, notice that the icon switches to . You can remove the property from the branding stylesheet. Be aware that removing a property defined in a template does not delete it from the panel. This is because all properties defined in a selected template are always shown and will reset to default values if the values were changed.

NOTE By default, if you add a branding stylesheet file to your project, it uses the "Empty" template, and displays as such in the preview.

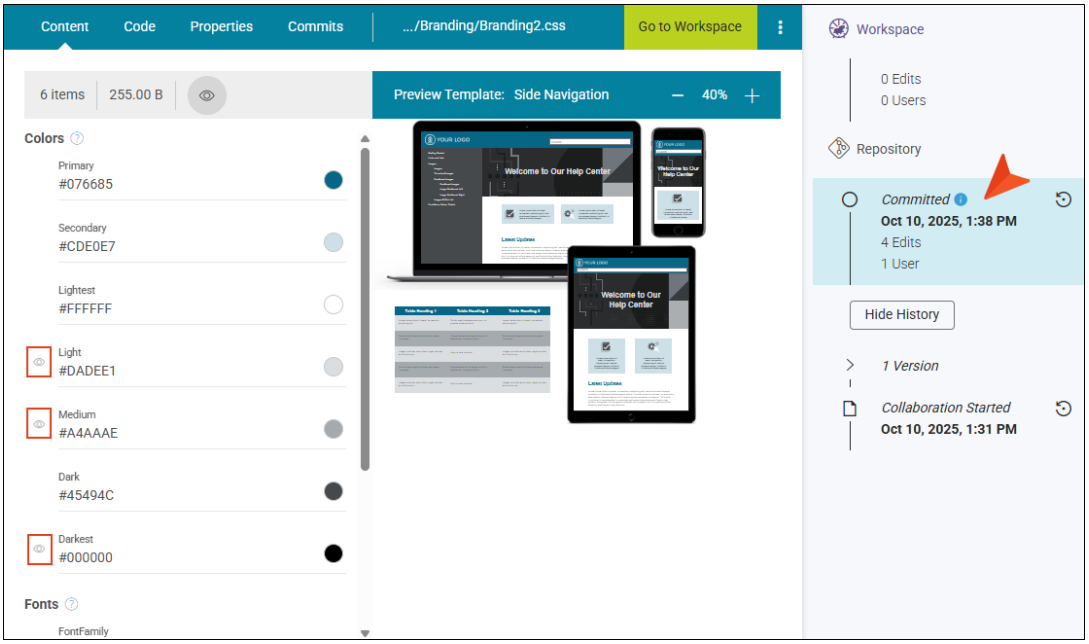


You can preview another template (e.g., side navigation), and toggle to show all preview properties.



You can select to add a property from another template to the stylesheet and commit the file.

If you select the latest committed file from the version timeline, the (bookmark) converts to a (Defined in Preview Template) icon. This shows outstanding styles from the preview template that have not been committed.



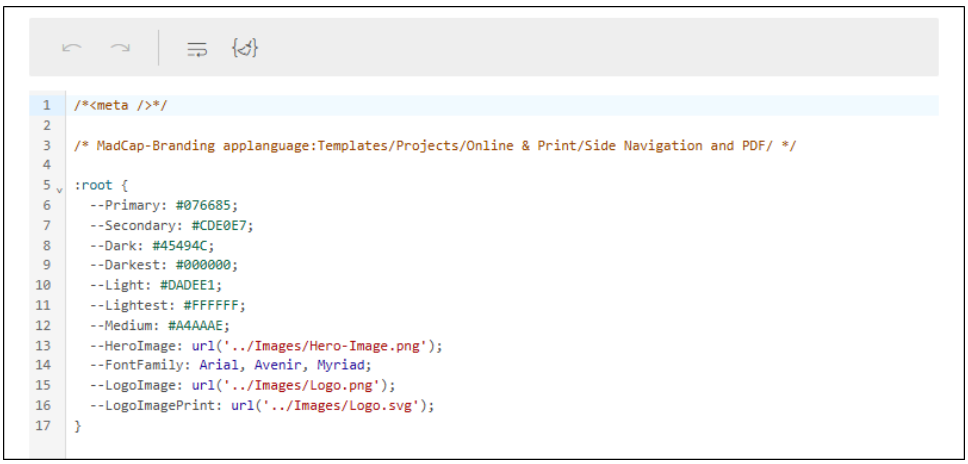
How to Delete a Branding Property

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, with **All Files** showing, navigate to and select a branding stylesheet file.
3. Hover the cursor over any of the properties to the left of the preview. Notice a trash bin icon displays for the property.
4. Click . This removes the property from the stylesheet.
5. Click **Commit**.
6. In the Create New Commit dialog, enter a **Commit Message**.
7. Click **Commit**. (Or click **Cancel**, to back out of the process.)

What’s Noteworthy?

NOTE The workspace supports collaborative editing for all cascading stylesheet (CSS) file types (i.e., branding or any other style file in the project). Collaborative editing for a non-branding stylesheet must take place in the editor's Code mode since the Content mode is not supported for this file type yet.

NOTE From the top of the interface, you can select **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.



```
/*<meta />*/

/* MadCap-Branding applanguage:Templates/Projects/Online & Print/Side Navigation and PDF/ */

:root {
  --Primary: #076685;
  --Secondary: #CDE0E7;
  --Dark: #45494C;
  --Darkest: #000000;
  --Light: #DADEE1;
  --Lightest: #FFFFFF;
  --Medium: #A4AAAE;
  --HeroImage: url('../Images/Hero-Image.png');
  --FontFamily: Arial, Avenir, Myriad;
  --LogoImage: url('../Images/Logo.png');
  --LogoImagePrint: url('../Images/Logo.svg');
}
```

NOTE When you add or change a property or value, it is saved to the branding stylesheet. If the regular stylesheet is using that property anywhere (i.e., CSS variable), then the update propagates to the regular stylesheet as well.

If a new property is added to the branding stylesheet, it is not likely associated with any style properties in the regular stylesheet, but it is "available" to use. You will have to do the following two things:

1. Apply the CSS variable to a style class or a skin using the Code Editor (this is due to current limitations in Flare Online regarding stylesheet editing). You have to apply it because the style must be tied to or point to the CSS variable—this does not happen on its own behind-the-scenes.
2. Apply the CSS variable to content in your project. You need to make sure the content in the topic or snippet has the style (e.g., an h4 style) and the branding property and value applied to it. Flare Online has limited style support, so depending on the style, you might be able to use the Content Editor or the Code Editor. (You can also use Flare Desktop.)

For more information about CSS and styles in a project, see the Flare Desktop Help system.

NOTE CSS variables are the foundation of branding functionality. The stylesheets in the project group together certain CSS variables (e.g., logo, hero image, font, color palette) that relate to branding. The branding values you identify in the Branding.css file are those associated with those CSS variables in the project.

Associating a Branding Stylesheet at the Project Level

When you add a new branding stylesheet, be sure to associate it as your primary branding stylesheet. Set the stylesheet at the project level for the same branding throughout the project. You can also set it at the target level.

Permission Required?

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- 

  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

- 

  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

How to Associate a Branding Stylesheet at the Project Level

1. On the left side of the Flare Online interface, click Projects.
2. Select a project to open it.
3. Click the Workspace tab at the top of the screen.
4. From the left side of the page, click the project file.
5. In the editor, from the Branding Stylesheet drop-down, select the name of the stylesheet, which is usually located under Resources > Branding.
6. Click Commit.
7. In the Create New Commit dialog, enter a Commit Message.
8. Click Commit. (Or click Cancel, to back out of the process.)

Associating a Branding Stylesheet at the Target Level

When you add a new branding stylesheet, be sure to associate it as your primary branding stylesheet. If you set the stylesheet at the target level, it will have precedence on whatever is set at the project level.

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How to Associate a Branding Stylesheet at the Target Level

1. From the **Projects** page (**Workspace** tab), open a target.
2. On the left, select **Appearance**.
3. Click the **Branding Stylesheet** field. Navigate to and select the name of the stylesheet, which is usually located under Resources > Branding.
4. Click **Commit**.
5. In the Create New Commit dialog, enter a **Commit Message**.
6. Click **Commit**. (Or click **Cancel**, to back out of the process.)

CHAPTER 3

Other Activities for Branding

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

This chapter discusses the following:

Renaming Branding Stylesheets 33
Deleting Branding Stylesheets 34

Renaming Branding Stylesheets

You can rename a branding stylesheet that you add to your project.

> **WARNING** If you want to rename a branding stylesheet in Flare Online it is better to do so before it has been associated with other files. Otherwise, renaming a branding stylesheet can result in broken links.

Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- ☑ Create/Edit Files

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- ☑ Edit Code

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How to Rename a Branding Stylesheet

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, navigate to the branding stylesheet file.
3. Right-click the branding stylesheet 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 Branding Stylesheets

If necessary, you can delete a branding stylesheet from your project.

> **WARNING** Use caution when deleting a file. If it has been previously linked to other files, deleting it can result in broken links. You would need to locate those broken links in Flare Desktop to fix them.

Permission Required?

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- ☑ Create/Edit Files

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- ☑ Edit Code

  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

How to Delete a Branding Stylesheet

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, navigate to the branding stylesheet file.
3. Right-click the branding stylesheet 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 Help system.

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 Guide

Links Guide

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