madcap software

USER GUIDE

MADCAP FLARE ONLINE

Links Guide

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CHAPTER 1

Introduction

A link is a feature that points to additional information from a specific area in a topic. The link may open information in the same topic, a different topic, or even a file outside of the project altogether. With print-based output the link can electronically open the destination if the user is viewing the manual online, depending on the type of output you create (e.g., PDF, Word). In addition, cross-reference links can be customized to refer to specific content and page numbers in the printed manual (e.g., See "My Topic" on page 32).

Types of Links

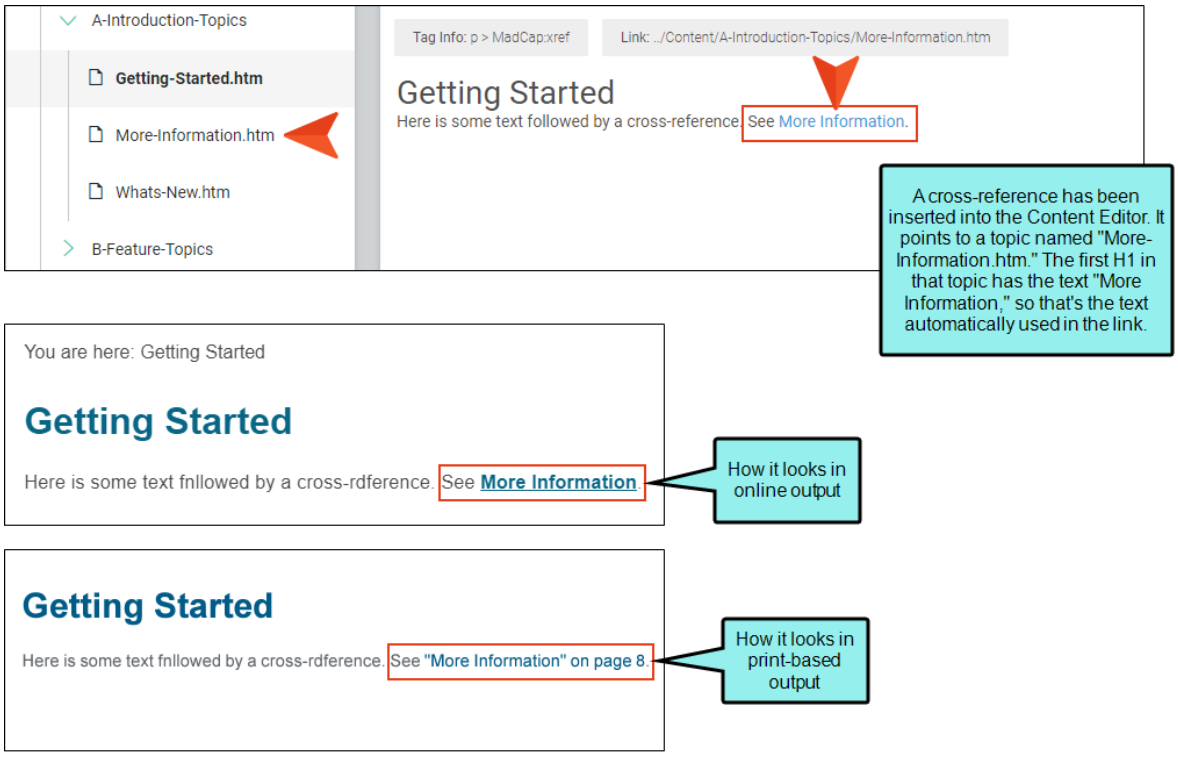
- "Cross-References" on page 5
- "Drop-Downs" on page 15
- "Text Hyperlinks" on page 20

WARNING It is recommended that you avoid creating links to snippets. This is primarily due to the nature of snippets, which are designed to be inserted into multiple files. Let's say you have a heading style in a snippet and that snippet is then inserted into 12 different topics. In another topic, you might decide to create a cross-reference that points to the heading in that snippet. But which of those 12 topics is it supposed to point to in the output? There is no way for Flare Online to know this, so you could end up with some very undesirable results. For this reason, it's a good idea not to link to any content in a snippet.

CHAPTER 2

Cross-References

A cross-reference is an automated link that is based on a format with commands. This method of linking saves time because you don't have to type the link text each time, or manage it over time if the destination content changes. Cross-references are recommended when you are linking from one place in your project to another (as opposed to linking to external files or websites).



NOTE For more information about cross-references, see the Flare Desktop Help system.

This chapter discusses the following:

General Information for Cross-References 7
Main Activities for Cross-References 11

General Information for Cross-References

There are various pieces of general information you should know if you plan to use this feature.

- "Cross-References vs. Hyperlinks" below
- "Cross-Reference Formats and Commands" on the next page

Cross-References vs. Hyperlinks

Use the following to help determine when to use a cross-reference and when to use a hyperlink.

Cross-References	Text Hyperlinks
Use for linking to other topics within the project, because the link text will automatically update if changes are made to the destination topic heading, file name, etc. Not designed for linking to content outside of the same project	Use for linking to websites and external files. Use for linking to other topics within the project when you want specific link text that doesn't necessarily match the destination heading, file name, etc.
Uses MadCap-specific style (MadCap|xref)	Uses standard CSS style (a), which is also used for image hyperlinks and popup links
Can be context-sensitive in print output (e.g., displays "next page," "below," or specific page number)	Not context-sensitive

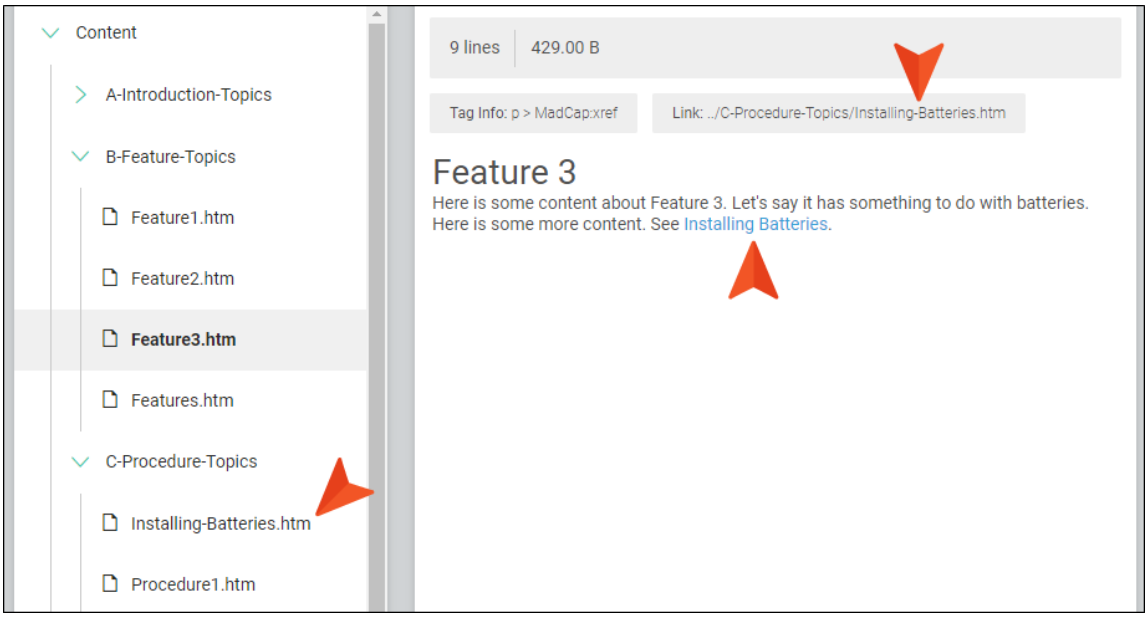
Cross-Reference Formats and Commands

Cross-references are based on formats consisting of text and/or various commands. These are associated with the various cross-reference styles and classes in the cascading stylesheet (CSS) file in the project. Also, you can have a different format associated with the cross-reference style in the print medium, so that output displays page numbers instead of just a simple link in the print-based output. **When you insert cross-references in Flare Online, the factory default format associated with the main MadCap|xref style—{para}—is always going to be used to display it in the Content Editor (because your CSS styles are not yet rendered in the editor). However, whatever format you've associated with MadCap|xref in the stylesheet will actually be used in the output.**

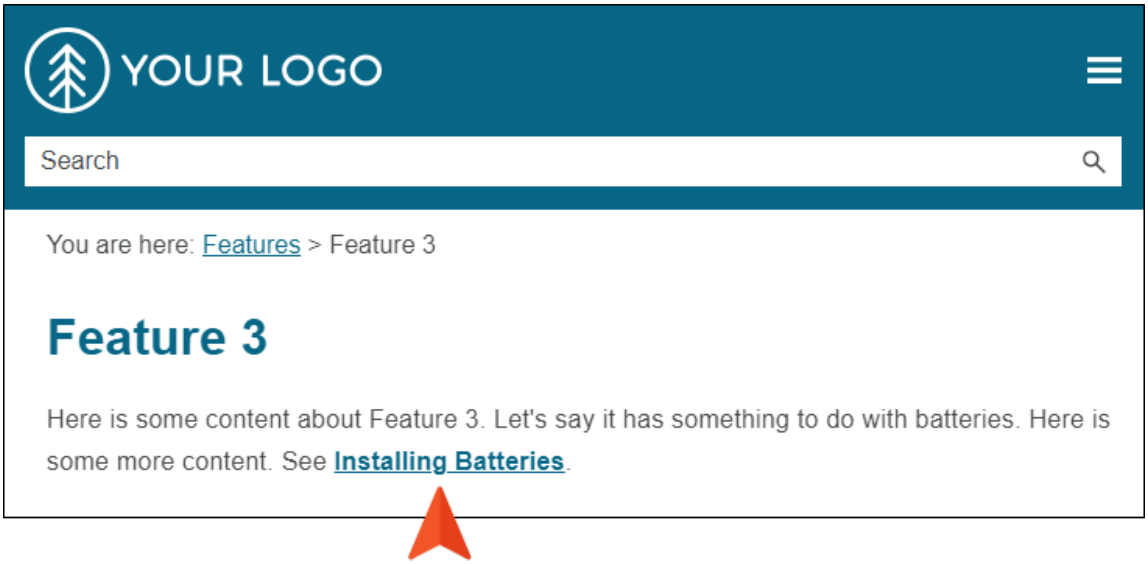
☆ EXAMPLE Here is the default format associated with the main MadCap|xref style (which you can change in the stylesheet, if you want):

{para}

The format consists of a single command, with no extra text. This particular command is designed to display the first paragraph that it comes across in the destination file, which is usually a heading. Cross-references will always display as plain blue text in the Content Editor, although the actual formatting in your stylesheet might be different and will be used in the final output.



If the destination file starts with the heading Installing Batteries, the inserted cross-reference link will simply display Installing Batteries in online output.

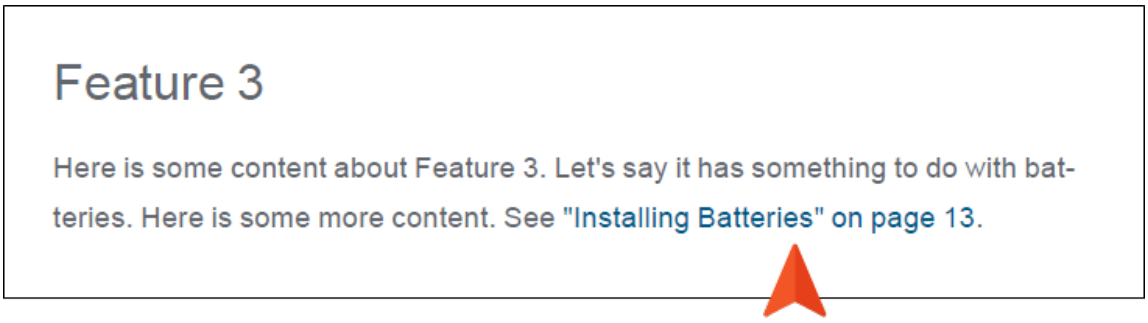


However, for print-based outputs, here is the default format associated with that same style (because it is using the print medium in the CSS file):

"{para}" {pageref}

This format uses two commands, with text (in this case, quotation marks) around one of the commands.

So in print-based outputs, the cross-reference link pointing to the Installing Batteries topic might display something like "Installing Batteries" on page 13.



☆ Later, if you decide to change the heading text of the destination topic from "Installing Batteries" to "Installing Large Batteries," the cross-references will be updated automatically when you generate the output. The new heading will automatically be reflected in all of the links using that cross-reference style (e.g., See Installing Large Batteries). If you had used text hyperlinks in a situation like this, you would need to find and replace the text in all of the pertinent links manually.

Main Activities for Cross-References

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

- "Inserting and Editing Cross-References" below
- "Removing Cross-References" on page 14

Inserting and Editing Cross-References

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.

- 

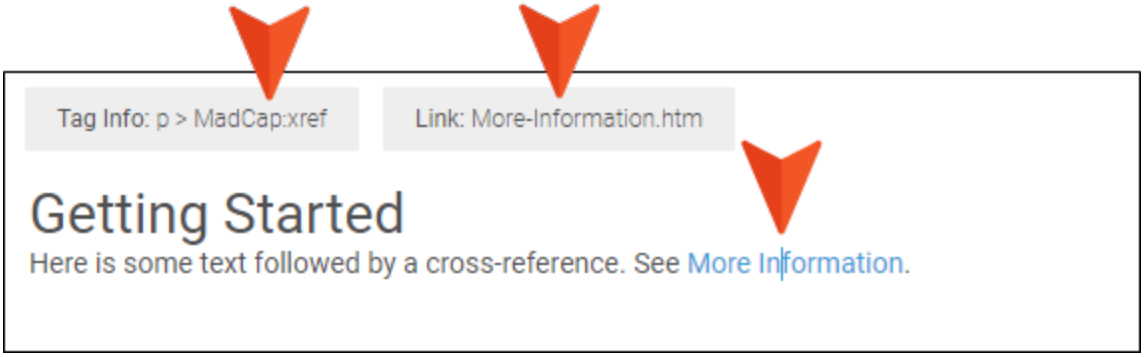
  If this is deselected, the XHTML in the Code view is read-only.

  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 Insert a Cross-Reference

1. Open a project, and select the Workspace 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 Content Editor place your cursor where you want to insert the cross-reference.
4. From the Content Editor's local toolbar, depending on the size of your screen, click , or select  and choose .
5. From the Link To drop-down field, select Topic in Project or Place In This Document.
6. In the next field, select the link's destination—either another topic or a place (e.g., top, bookmark, heading, or paragraph) in the current topic or snippet.
7. (Optional) Expand Link Properties and complete any of the fields under it.
    - Target Frame Click the drop-down arrow to select the way the linked destination will open.
        - Parent Frame The destination file opens in the parent frame of the current topic while hiding that topic.
        - New Window/Tab The destination file opens in a new browser window or tab.
        - Same Frame The destination file opens in the same frame as the current topic.
        - Top Frame The destination file opens in the same output window, removing all other framesets. You might use this option, for example, if the destination topic has its own frameset.
        - Popup Window The destination file opens in a popup box on top of the current topic.
    - Alternate Text Type a phrase that describes what the element is about. This option should be used to increase accessibility for users who are unable to view an element.
    - Screen Tip Type a phrase that will appear when the end user hovers over the cross-reference in the output.
8. Click Insert.

NOTE Cross-references display in blue in the Content Editor, just as text hyperlinks do. You can tell them apart by clicking on the link and looking in the info bar. A <MadCap:xref> tag indicates the presence of a cross-reference. The info bar also shows the destination file for the link.



At this time, Flare Online does not display content exactly as it is formatted according to your Flare stylesheet, but in the output it will look just as you have designed it. For example, you might have designed cross-references in your stylesheet to display in orange and underlined. In the Content Editor in Flare Online, they will show as blue with no underline, but in the generated output they will be orange and underlined.

How to Edit a Cross-Reference

1. In the Content Editor click on any of the text for the cross-reference that you want to edit (i.e., on the blue text).
2. From the Content Editor's local toolbar, select the **Links** drop-down and click .
3. Change any of the fields in the previous steps for field descriptions.
4. Click **Save**.

Removing Cross-References

You can quickly remove any cross-references that have been inserted in a topic or snippet. Doing this removes the link, but it leaves the text.

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 Remove a Cross-Reference

1. Open a project, and select the **Workspace** 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 Content Editor click on any of the text for the cross-reference that you want to remove (i.e., on the blue text).
4. From the Content Editor's local toolbar, depending on the size of your screen, click , or select select  and choose .

CHAPTER 3

Drop-Downs

A drop-down is a feature that lets you click a hotspot to expand and collapse specified content (paragraphs, lists, images, tables, videos, etc.) below it. .

NOTE For more information about drop-downs, see the Flare Desktop Help system.

Inserting and Editing Drop-Downs

Authors can insert drop-downs in Flare Online's Content Editor.

> NOTE Inserting drop-downs is available only for authors, and only in the Content Editor accessed from the project's Workspace page. It is not available in the editor that is used for topic reviews.

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

  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.

- Edit Code

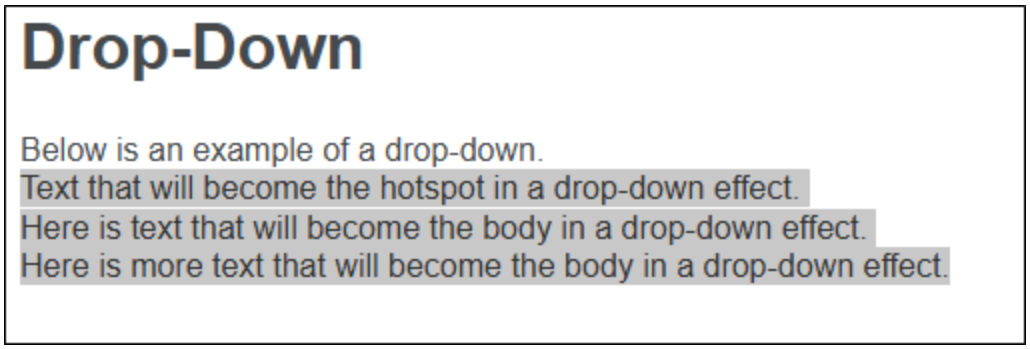
  If this is deselected, the XHTML in the Code view is read-only.

  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 Insert a Drop-Down

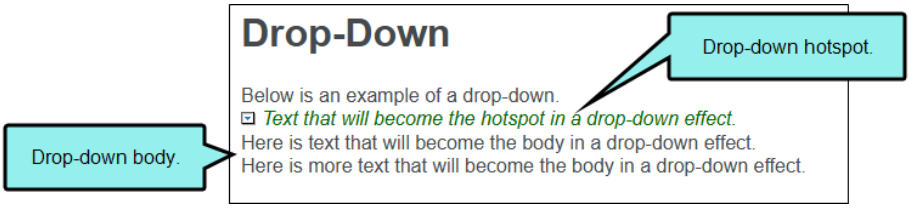
1. Open a project, and select the **Workspace** tab at the top.
2. On the left, navigate to a topic or snippet file. The file contents display on the right.
3. In the Content Editor type and format the content that will become the drop-down hotspot and the drop-down body.

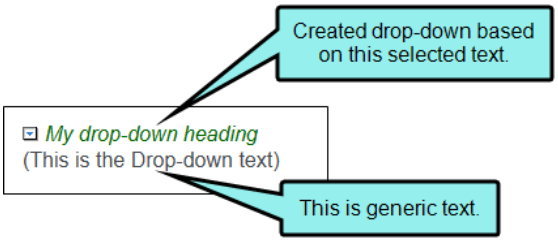
4. Highlight all of the paragraphs that you want to be part of the drop-down effect, including the first paragraph, which will contain the hotspot.



5. From the Content Editor's local toolbar, depending on the size of your screen, click , or select  and choose .

   The selected content is converted to a drop-down effect.



> NOTE If you only selected one paragraph when creating a drop-down, Flare Online adds some generic text after the heading for you to replace.
>
> 
>

How to Edit a Drop-Down

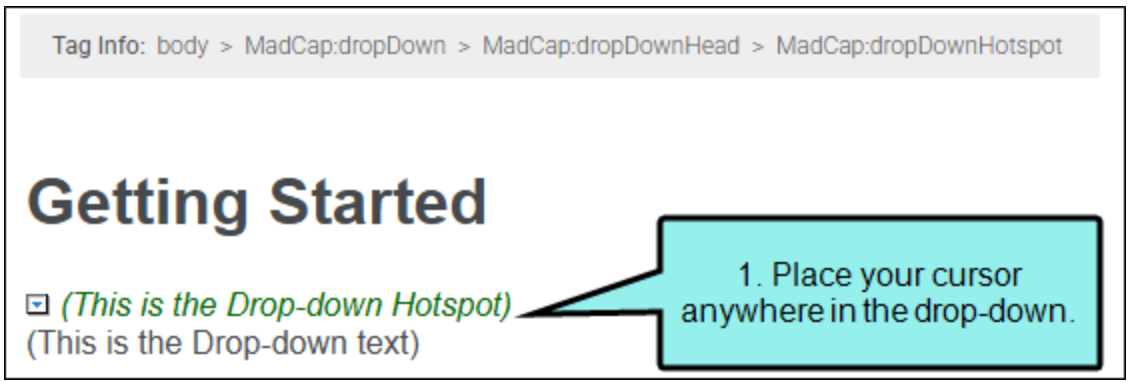
You can edit the content in a drop-down that you have inserted into a file. Simply click in the hotspot or in the body area and add your content.

How to Exit From a Drop-Down

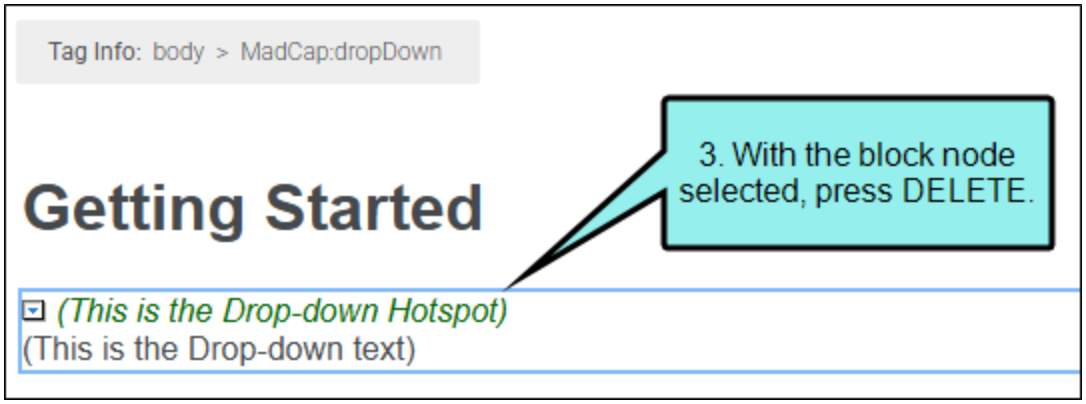
If you have been adding content within a drop-down body tag and want to exit that container to add content outside of it, press the down arrow on your keyboard. The cursor moves below the drop-down, where you can continue to type or insert other content.

How to Delete a Drop-down

If you decide to remove an inserted drop-down, the best way to delete a block node is to click it in the tag bar, and press DELETE.



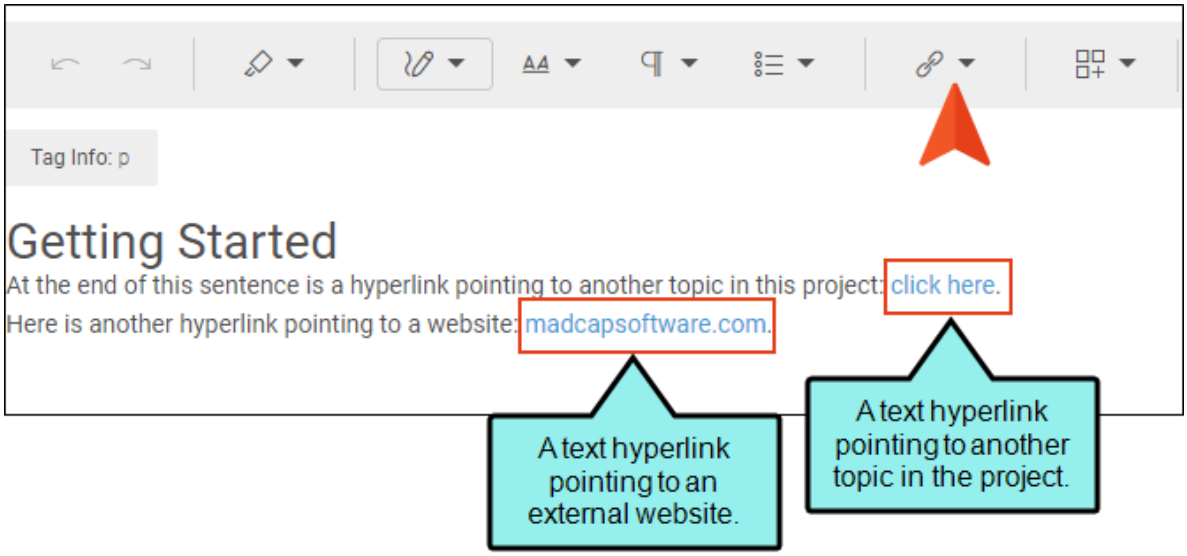




CHAPTER 4

Text Hyperlinks

A text hyperlink is one of the most basic forms of a link. It is simply a hyperlink applied to text. When an end user clicks the hyperlink in the output, the location specified in the hyperlink opens. The location can be another topic in the project, a place in the current file (such as a heading or bookmark), or a file outside of the project (such as a website or PDF on the internet). In general, text hyperlinks are recommended for links that point to locations outside of your project (e.g., to a website) or to a location in the project when you want particular text for the link (e.g., "click here"). On the other hand, cross-references are recommended for links that point to locations within the project (e.g., from one topic to another, or a place within the same topic) when you want the link text to be automatically applied.



NOTE For more information about text hyperlinks, see "Cross-References vs. Hyperlinks" on page 7. Also, see the Flare Desktop Help system.

This chapter discusses the following:

Inserting and Editing Text Hyperlinks 22
Removing Text Hyperlinks 26

Inserting and Editing Text Hyperlinks

The following steps show you how to insert text hyperlinks into content files, and how to edit existing text hyperlinks.

> NOTE Inserting text hyperlinks is available only for authors, and only in the Content Editor accessed from the project's Workspace page. It is not available in the editor that is used for topic reviews.

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

  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.

- ☑ 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 Insert a Text Hyperlink

1. Open a project, and select the **Workspace** 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 Content Editor highlight the text that you want to turn into a hyperlink.
4. From the Content Editor's local toolbar, select  and choose .
5. From the **Link To** drop-down field, select **File in Project** (for a link to another topic), **Place In This Document** (for a link to a bookmark, heading, etc. in the same file), or **External Link** (for a link to a website or external file).
6. In the next field, select or type the link's destination.
7. (Optional) In the **Text** field, you can change or enter the text that is used for the link.

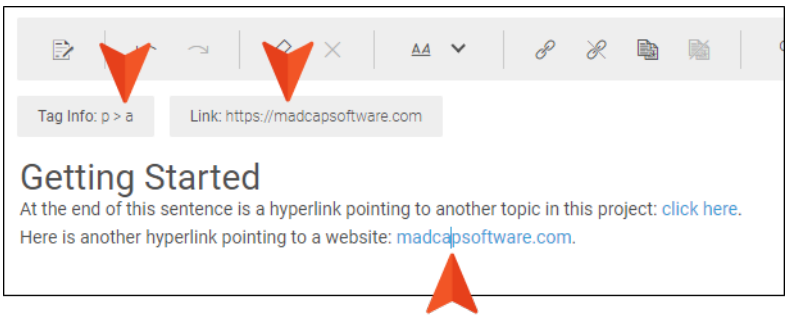
   > NOTE This field is disabled if you have selected content that contains XML tags. You should only select plain text.

8. (Optional) Expand **Link Properties** and complete any of the fields under it.
   - **Style Class** Enter a defined hyperlink style from your stylesheet. The formatting for that style will be applied to the link. (If you do not specify a style class, Flare Online uses the parent "a" style.) For more about style classes, see the Flare Desktop Help system.
   - **Style ID** Enter a defined style ID from your stylesheet. It will be applied to the link. For more about style IDs, see the Flare Desktop Help system.
   - **Target** Click the drop-down arrow to select the way the linked destination will open.
     - **Parent Frame** The destination file opens in the parent frame of the current topic while hiding that topic.
     - **New Window/Tab** The destination file opens in a new browser window or tab.
     - **Same Frame** The destination file opens in the same frame as the current topic.
     - **Top Frame** The destination file opens in the same output window, removing all other framesets. You might use this option, for example, if the destination topic has its own frameset.
     - **Popup Window** The destination file opens in a popup box on top of the current topic.

- **Tab Index** Enter a value to specify the order in which users can tab through hyperlinks in a topic. So when a user presses the TAB key the first time in a topic, the hyperlink with an index value of 1 will be selected first, the hyperlink with a value of 2 will be selected next, and so on. If you want to skip a hyperlink, enter -1 in that field.
- **Alternate Text** Type a phrase that describes what the element is about. This option should be used to increase accessibility for users who are unable to view an element.
- **Screen Tip** Type a phrase that will appear when the end user hovers over the text hyperlink in the output.

9. Click **Insert**.

NOTE Text hyperlinks display in blue in the Content Editor, just as cross-references do. You can tell them apart by clicking on the link and looking in the info bar. An <a> tag indicates the presence of a text hyperlink. The info bar also shows the destination for the link.



At this time, Flare Online does not display content exactly as it is formatted according to your Flare stylesheet, but in the output it will look just as you have designed it. For example, you might have designed text hyperlinks in your stylesheet to display in orange and underlined. In the Content Editor in Flare Online, they will show as blue with no underline, but in the generated output they will be orange and underlined.

How to Edit a Text Hyperlink

1. In the Content Editor click on any of the text for the hyperlink that you want to edit (i.e., on the blue text).
2. From the Content Editor's local toolbar, click .
3. Change any of the fields in the previous steps for field descriptions.
4. Click Save.

Removing Text Hyperlinks

You can quickly remove any text hyperlinks that have been inserted in a topic or snippet. Doing this removes the link, but it leaves the text.

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How to Remove a Text Hyperlink

1. Open a project, and select the **Workspace** 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 Content Editor click on any of the text for the hyperlink that you want to remove (i.e., on the blue text).
4. From the Content Editor's local toolbar, select  and choose .

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

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Styles Guide

Targets Guide

Tasks Guide

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide