madcap software

USER GUIDE

MADCAP FLARE ONLINE

Snippets Guide

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CHAPTER 1

Introduction

A snippet is a chunk of formatted content that is heavily used in single-sourcing. Snippets can include text, tables, images, and whatever else can be included in a normal topic. You can insert snippets into one or more topics throughout your project, thus allowing you to reuse content that is maintained in one place. You can even insert them into other snippets, creating nested snippets. Snippets are not usually intended for single words or very short phrases that change frequently. In those cases, you probably want to use variables instead.

General Information

- "Benefits of Snippets" on page 8
- "Snippet Files" on page 8
- "Text and Block Snippets" on page 9
- "Appearance of Snippets" on page 10

Main Activities

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- "Inserting Snippets" on page 16
- "Changing Snippets" on page 21

Other Activities

- "Renaming Snippets" on page 23
- "Removing Snippets" on page 26
- "Deleting Snippets" on page 28

NOTE For more information about snippets, see the Flare Desktop Help system.

CHAPTER 2

General Information for Snippets

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

This chapter discusses the following:

Benefits of Snippets 8
Snippet Files 8
Text and Block Snippets 9
Appearance of Snippets 10

Benefits of Snippets

The major benefit of using snippets is that you only have to create your content once, rather than having to type the same information in each topic (or in another snippet) where you want to use it. If you need to modify the content of a snippet, you only need to change it in one place and the change is made automatically in every file where the snippet has been inserted.

Snippet Files

Snippets are contained in their own files (using an .flsnp file extension). The recommended location to store a snippet in a project is Contents > Resources > Snippets folder. However, in the project, you can store it anywhere in the Files tree (i.e., the Content Explorer) that you like.

Text and Block Snippets

There are two types of snippets: text and block. This is determined by the way you insert the snippet.

- Text Snippet If you insert a snippet on a line where other content exists (i.e., inline), it is inserted as a text snippet. Therefore, if you want to insert a snippet on a blank line and also type other text before or after it, you need to type the text first and then insert the snippet afterward.
- Block Snippet If you insert a snippet on a blank line in a topic, it is inserted as a block snippet and takes up all of the room so that no other content can be added in front of it or behind it. (The exception to this is if you have created a snippet containing only a <body> tag and no block tags, such as <p>; in that case, the snippet inserted on an empty line becomes a text snippet.)

When a snippet has multiple "blocks" of content (e.g., paragraphs, lists, images), it is best to insert it as a block snippet on an empty line, because it doesn't work well when inserted as a text snippet (i.e., inline with other content). Conversely, a snippet containing a single line of content (e.g., one sentence, one paragraph) can be inserted as a block snippet on an empty line, or as a text snippet inline with other content.



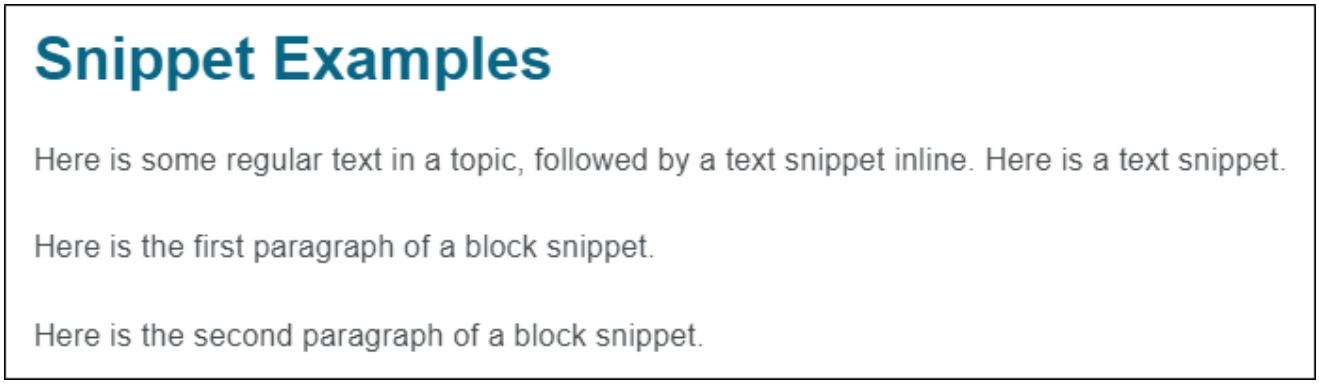
Appearance of Snippets

Snippets (both text and block) are represented in the Flare Online editors by a border (in most browsers), which does not display in the output. In the output, snippets are rendered appropriately according to the formatting from your stylesheet.

HOW SNIPPETS MIGHT LOOK IN THE SOURCE FILE



HOW SNIPPETS MIGHT LOOK IN THE OUTPUT



CHAPTER 3

Main Activities for Snippets

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

This chapter discusses the following:

Adding Snippets 12
Inserting Snippets 16
Editing Snippets in a Popup 18
Changing Snippets 21

Adding Snippets

You can add a new snippet and then insert it into the topics where you want it to appear.

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.

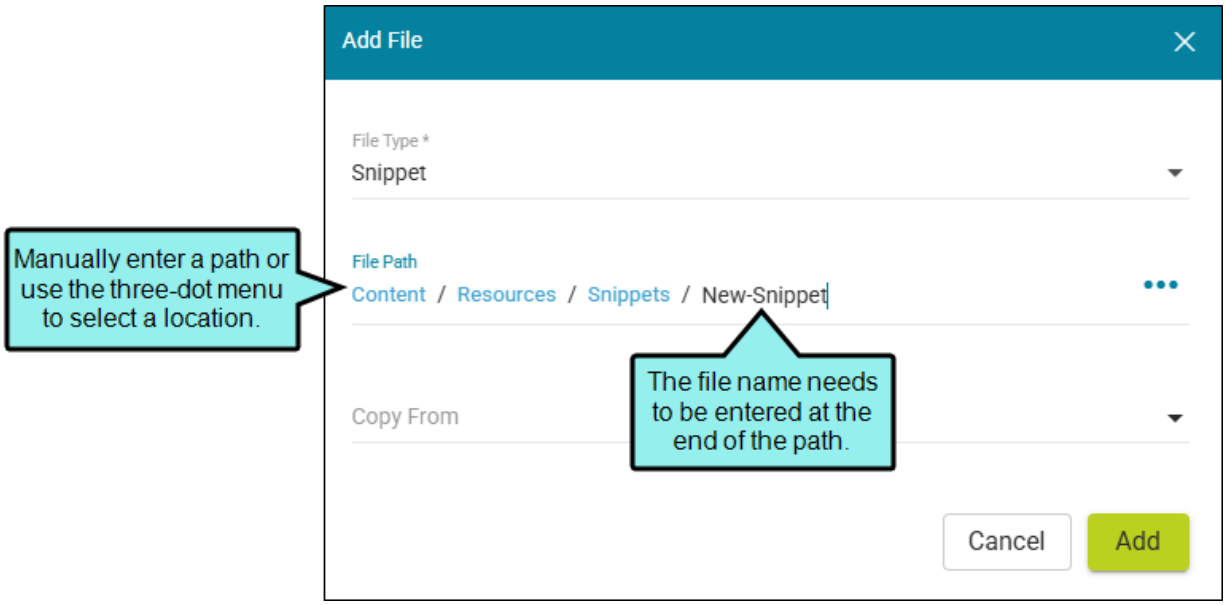
How to Add a Snippet

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.

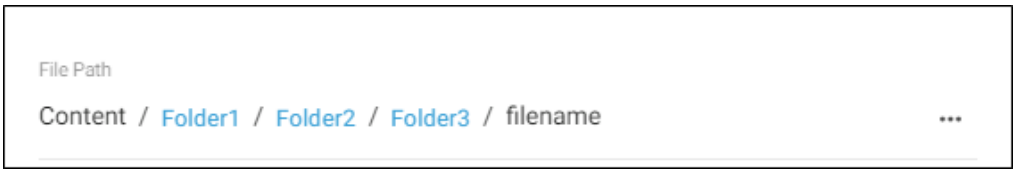
3. In the Add File dialog, click the **File Type** drop-down, and select **Snippet**.
4. In the **File Path** field, enter a path and a name for the new file.

> 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.

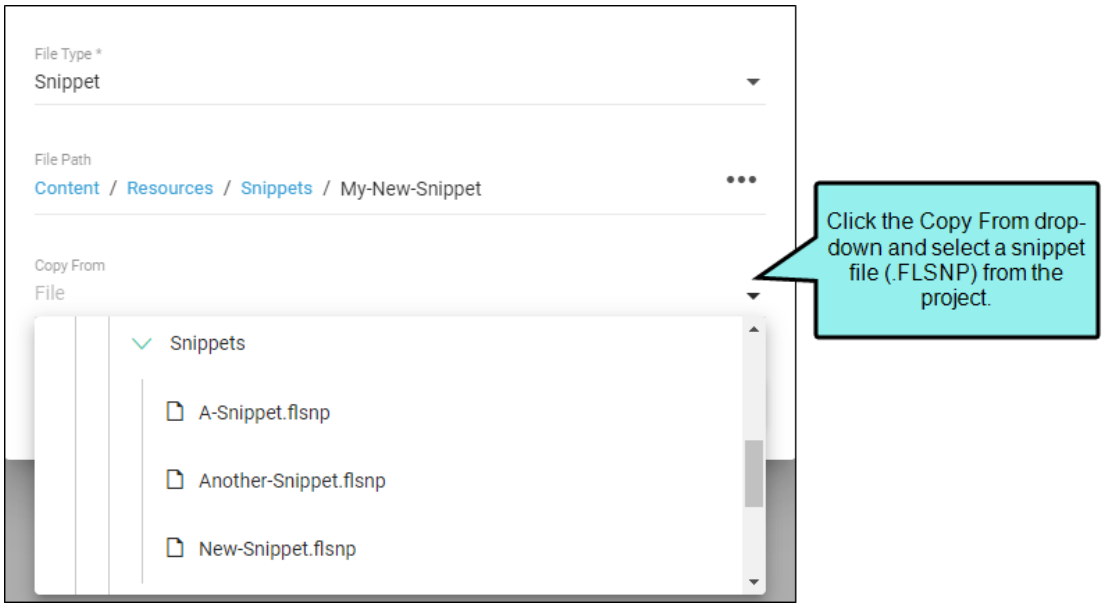
For example, in the Add File dialog, a file path contains several folders (indicated by blue lettering) before the filename.



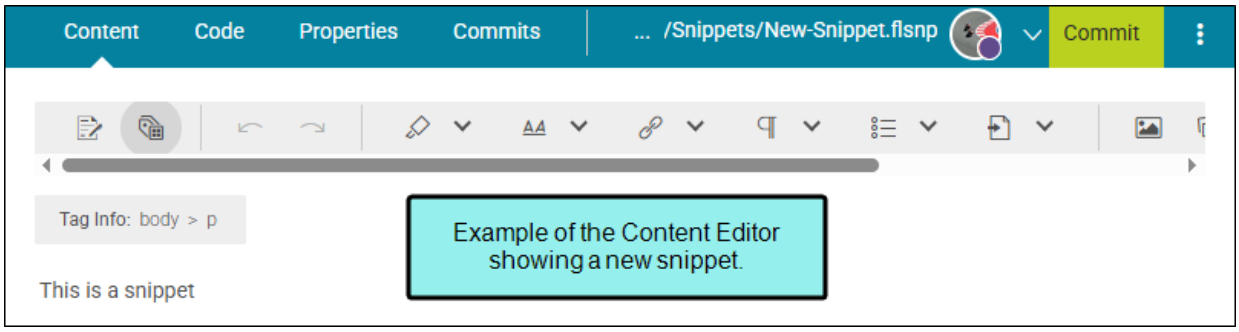
If the "Folder1" item is clicked, you know longer see the subfolders.



5. (Optional) In the Add File dialog, from the **Copy From** drop-down, you can select an existing snippet file to use. This copies all the content from the existing file to the new file, providing a base of information to start with for your file. If you choose not to select a file here, the new file will be based on factory content.



6. Click **Add**. A new file is created and opens in the Content 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 snippets file is added to the project.

Inserting Snippets

Authors can insert snippets in Flare Online's Content Editor.

> NOTE Inserting snippets 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:

- 

  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 Snippet

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 snippet.
4. From the Content Editor's local toolbar, depending on the size of your screen, click , or select  and choose .
5. In the Insert Snippet dialog, navigate to the snippet you want to insert (usually it is under Resources > Snippets).
6. Select the snippet and click **Insert**.

Editing Snippets in a Popup

You can open snippets from their point of insertion in a file and make edits in a popup window. This means you do not need to interrupt the flow of editing the topic (or another snippet) in order to edit a snippet within it.

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:

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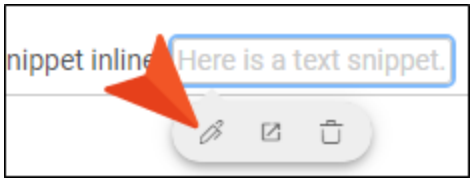
- 

  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 Edit a Snippet in a Popup

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 the inserted snippet.
4. In the toolbar popup under the snippet, click .



> NOTE You can also right-click the snippet and select **Edit Snippet**.

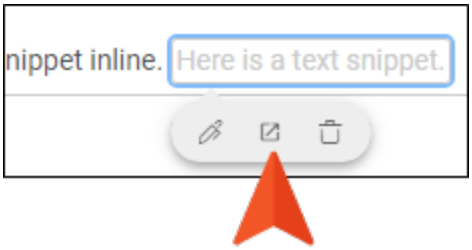
5. In the popup editor, make changes to the snippet.
6. Click **Commit**.
7. In the Create New Commit dialog, enter a **Commit Message**.
8. Click **Commit**.

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

NOTE If you are collaboratively editing with snippets and changes are made from an external source, the pull bar and Pull Changes button displays in the Snippet dialog.

NOTE You can also open a snippet file in the full editor.

1. In the editor click the inserted snippet.
2. In the toolbar popup under the snippet, click . (You can also right-click the snippet and select **Open Snippet File**.)



If the current file has uncommitted changes, you will see a message reminding you of this. You can either keep the file open and commit the edits first, or you can discard the changes.

Changing Snippets

If a snippet has already been inserted into a topic or another snippet, you can change it to a different snippet.

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:

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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 Change a Snippet

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 the snippet.
4. From the Content Editor's local toolbar, depending on the size of your screen, click , or select  and choose .
5. In the Insert Snippet dialog, navigate to a different snippet.
6. Select the snippet and click **Insert**.

CHAPTER 4

Other Activities for Snippets

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

This chapter discusses the following:

Renaming Snippets 23

Removing Snippets 26

Deleting Snippets 28

Renaming Snippets

You can rename a snippet file in your project.

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

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:

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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.

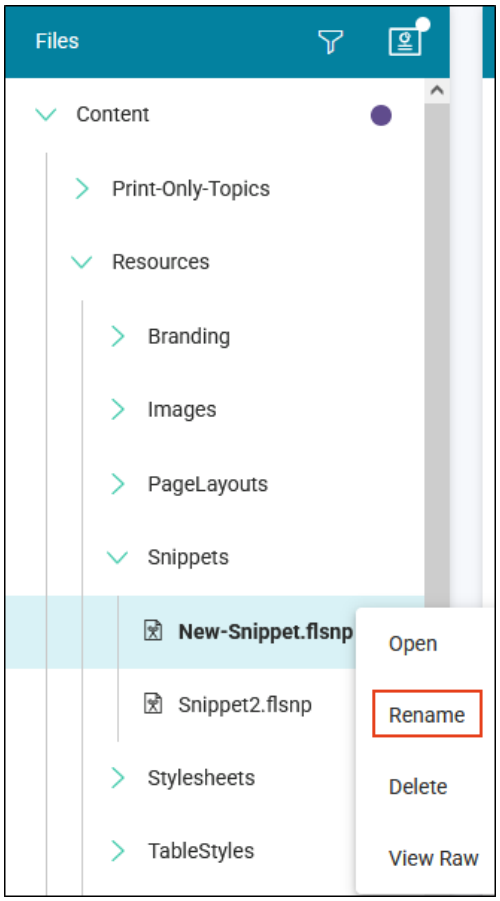
- 

  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.

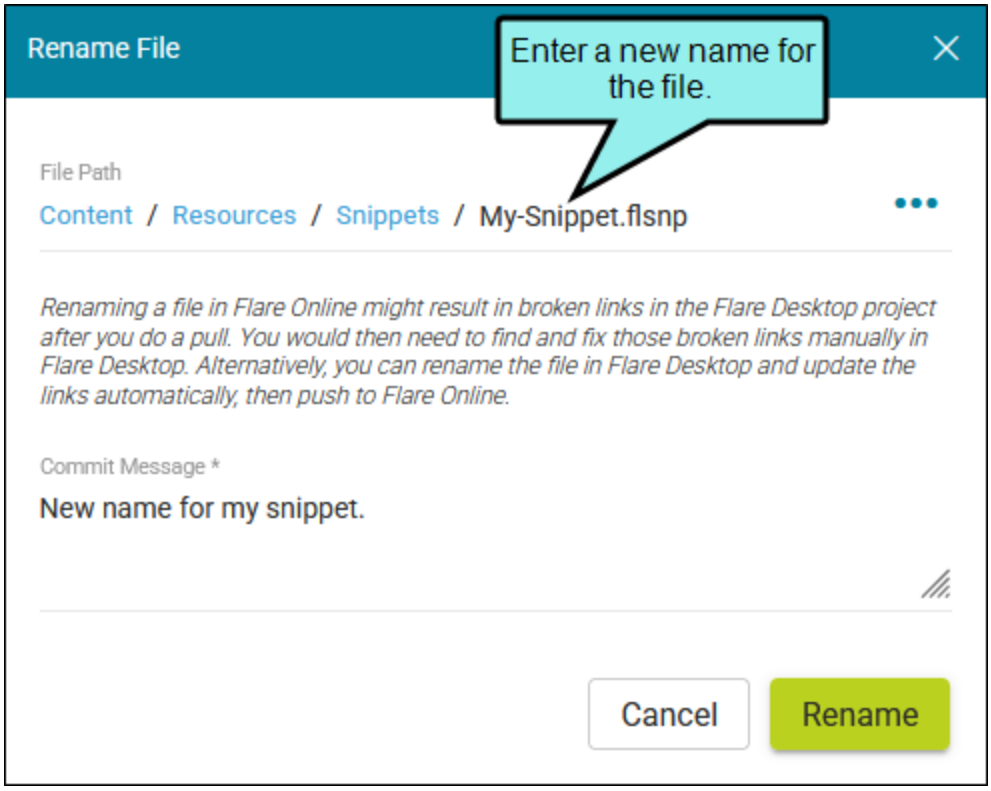
How to Rename a Snippet

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, navigate to the snippet you want to rename. Right-click the snippet, and from the menu select **Rename**.



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

   You can optionally click ••• to select a location for the file in the project.



Removing Snippets

You can quickly remove any snippets that have been inserted in a topic or another snippet. This does not remove the snippet from the project.

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.

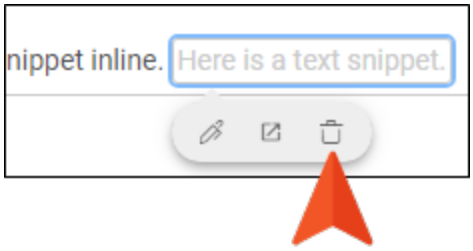
- 

  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 Snippet

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 the snippet.
4. Do one of the following:
    - On your keyboard, press **DELETE**.
    - In the toolbar popup, click .



Deleting Snippets

If necessary, you can delete a snippet file 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?

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.

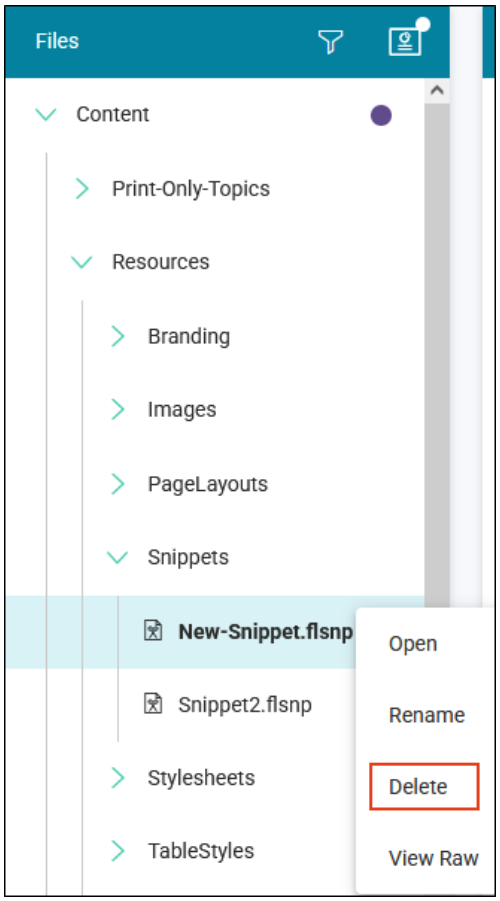
- ☑ Edit Code

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

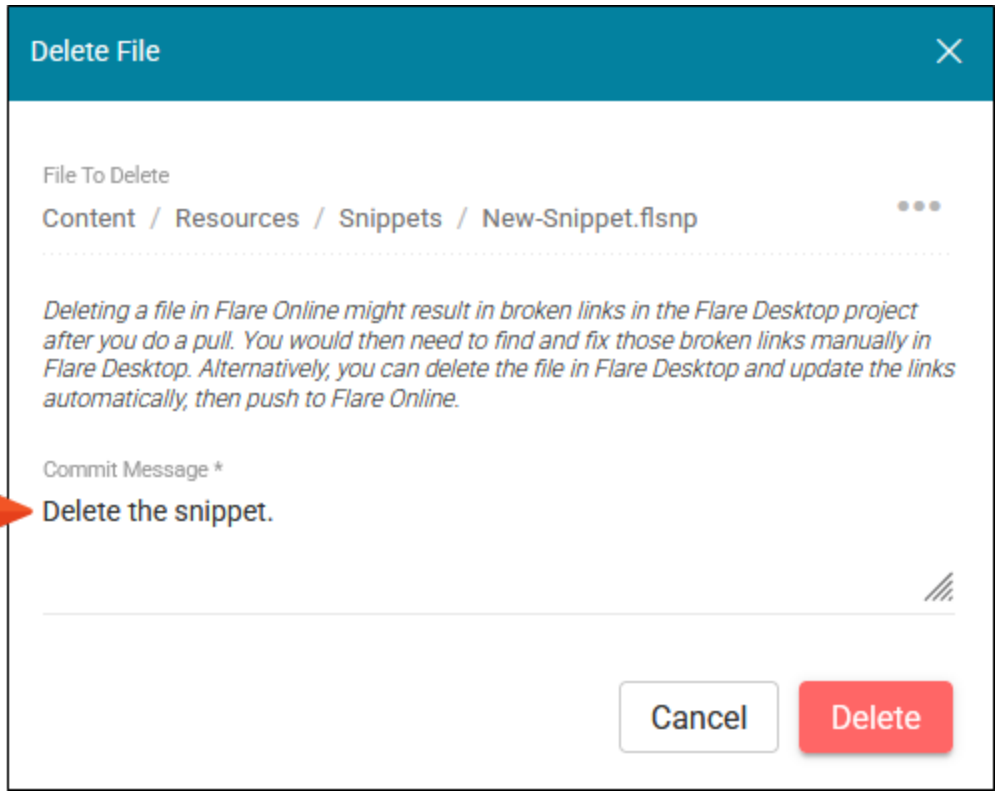
  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

How to Delete a Snippet

1. Open a project, and select the **Workspace** tab at the top.
2. From the left side of the page, navigate to the snippet you want to delete. Right-click the snippet, and from the menu select **Delete**.



3. 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

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