

**MADCAP FLARE 2024**

# Templates

Copyright © 2024 MadCap Software. All rights reserved.

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

MadCap Software  
9171 Towne Center Drive, Suite 335  
San Diego, California 92122  
858-320-0387  
[www.madcapsoftware.com](http://www.madcapsoftware.com)

**THIS PDF WAS CREATED USING MADCAP FLARE.**

# CONTENTS

---

## **CHAPTER 1**

|                    |   |
|--------------------|---|
| Introduction ..... | 4 |
|--------------------|---|

## **CHAPTER 2**

|   |    |
|---|----|
| General Information for Templates ..... | 11 |
| Contribution Templates .....            | 12 |
| Flare's Factory Project Templates ..... | 12 |

## **CHAPTER 3**

|                                  |    |
|----------------------------------|----|
| Process for Templates .....      | 19 |
| Creating Template Folders .....  | 20 |
| Creating Templates .....         | 21 |
| Managing Templates .....         | 27 |
| Changing Project Templates ..... | 29 |

## **APPENDIX**

|                    |    |
|--------------------|----|
| PDFs .....         | 31 |
| Tutorials .....    | 31 |
| Cheat Sheets ..... | 32 |
| User Guides .....  | 33 |

## CHAPTER 1

---

# Introduction

A template is an existing project or file that serves as the basis for a new one, providing preset content, settings, or formatting.

In most cases, Flare provides you with one or more templates (called "factory templates"), so you do not need to worry about coming up with your own. However, if you want, you can create your own templates and use them when you create new projects or add new elements to a project. Templates can be especially useful when you are working on a team.

### General Information

- "Contribution Templates" on page 12
- "Flare's Factory Project Templates" on page 12

### Process

1. "Creating Template Folders" on page 20
2. "Creating Templates" on page 21
3. "Managing Templates" on page 27
4. Select a template when creating a new project or file.

☆ **EXAMPLE** You are working with a team of 10 other writers, and you want to create a topic called "Welcome" that all authors should use in their projects. The template topic will contain some standard text and headings. In addition, the topic links to a stylesheet, which automatically gives the topic the appropriate look and feel. The idea is the authors will create a "Welcome" topic in each of their projects, adding more content to that topic as needed; all "Welcome" topics should be consistent and look the same in all projects.

To accomplish this, you first open a Flare project and create the topic. It might look something like this:

## Welcome

Welcome to [Name of Product], which is used to [purpose of product].

### How It Works

The following diagram shows how [Name of Product] works.

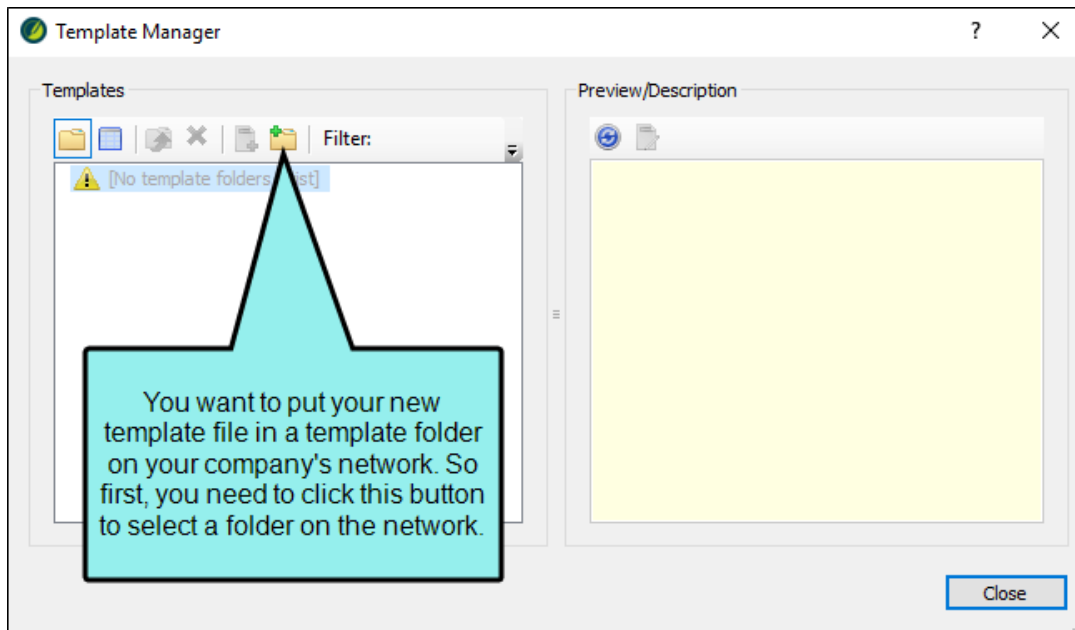
[Insert Process Image]

### Steps

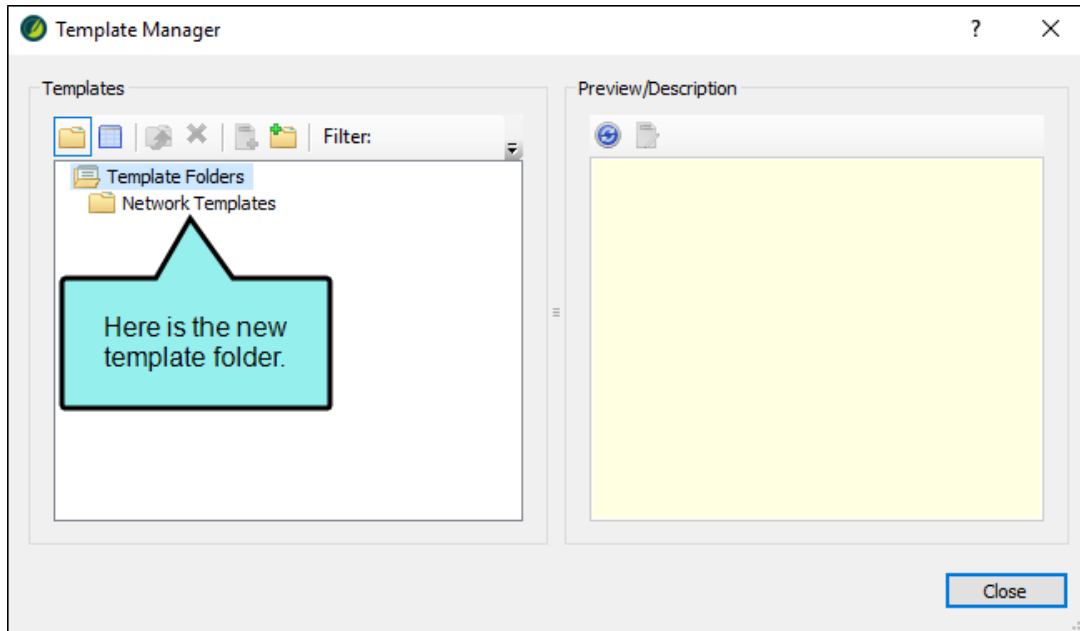
Following are the basic steps for using [Name of Product].

1. [Step one].
2. [Step two].
3. [Step three].

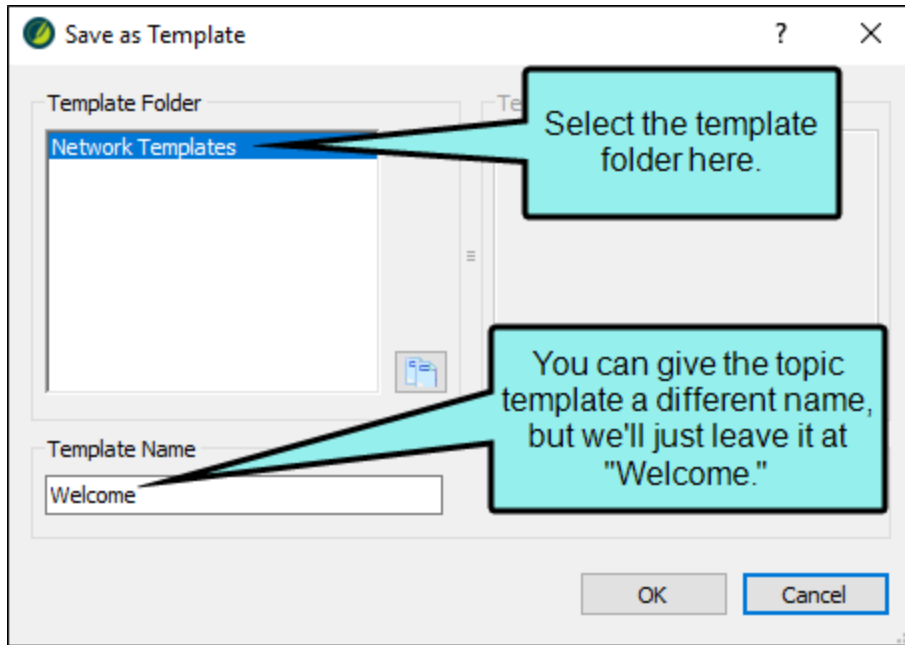
- ☆ Now you need to make sure that you have a template folder ready to hold the new template file. Therefore, you select the **Tools** ribbon. In the **Templates** section you click **Manage Templates**. This opens the Template Manager.



- ☆ In the dialog that opens, you find and select the folder where you want to store the template file.

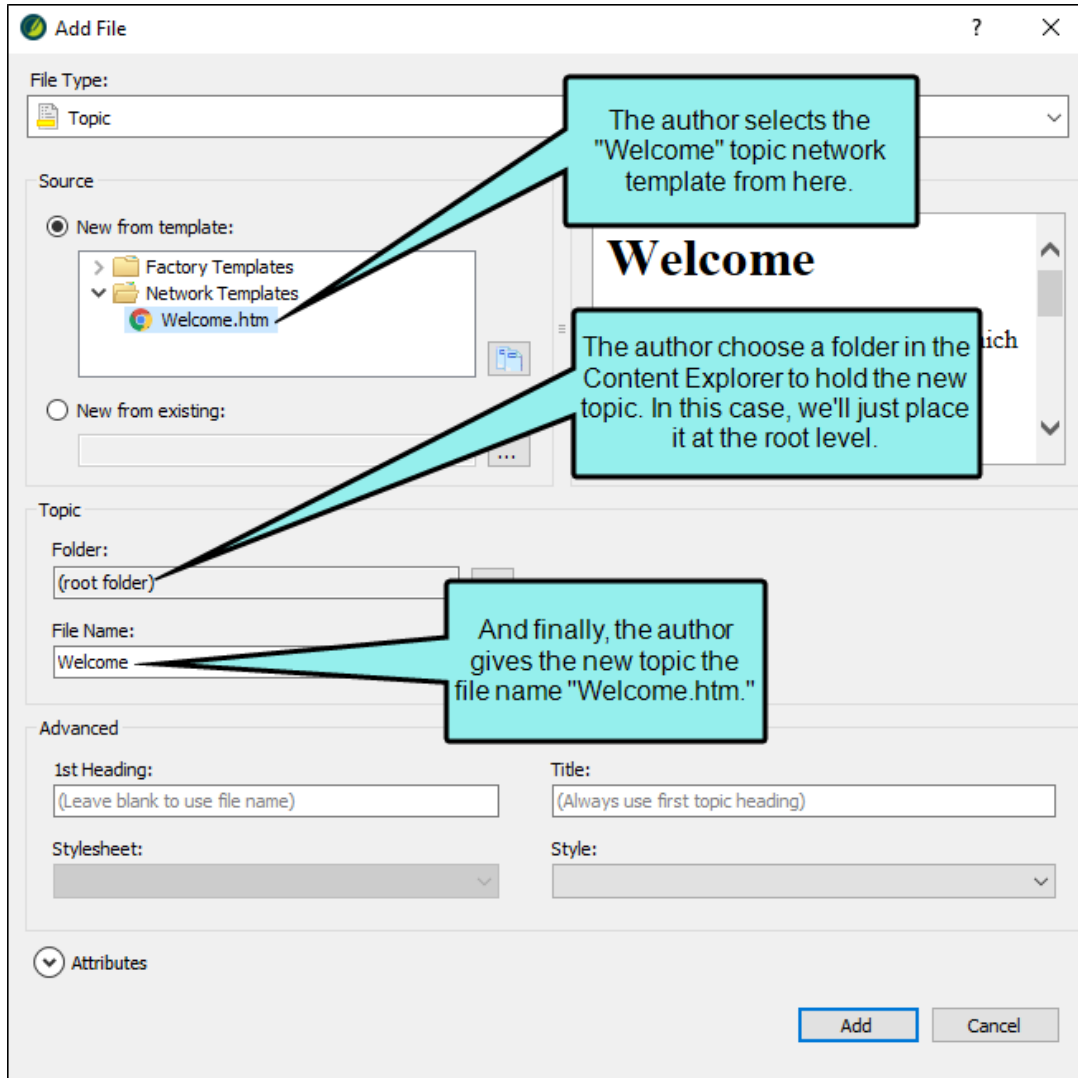


- ☆ After closing the Template Manager, you make sure your new topic is still open. Then you select **File > Save > Save As Template**. In the dialog that opens, you select the new template folder and click **OK**.





- ☆ Now let's say that Karen, one of the other authors, wants to create a "Welcome" topic for a new project she is working on. In her Flare project, she selects **Project > New > Topic**. In the dialog that opens, she selects the template file you created, chooses a location (in the following example, the root folder), and provides a name for the new file. Then she clicks **Add**.



☆ The new topic is added to the Karen's project. In order for her topic to look just like your topic, she needs to add the same stylesheet file to her project. This can be done by simply importing that file or maybe through Global Project Linking.

Once Karen brings the stylesheet file into her project, she can associate it at the project, target, or topic level. Let's say she sets it at the project level (in the Project Properties dialog, which is opened by selecting Project > Project Properties). After doing this, her topic will look just like yours, and she can begin adding content to it.

# General Information for Templates

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

This chapter discusses the following:

|   |    |
|---|----|
| Contribution Templates .....            | 12 |
| Flare's Factory Project Templates ..... | 12 |

# Contribution Templates

Authors, developers, or other individuals in your company can use MadCap Contributor to create new documents and files, which can be incorporated into your Flare project.

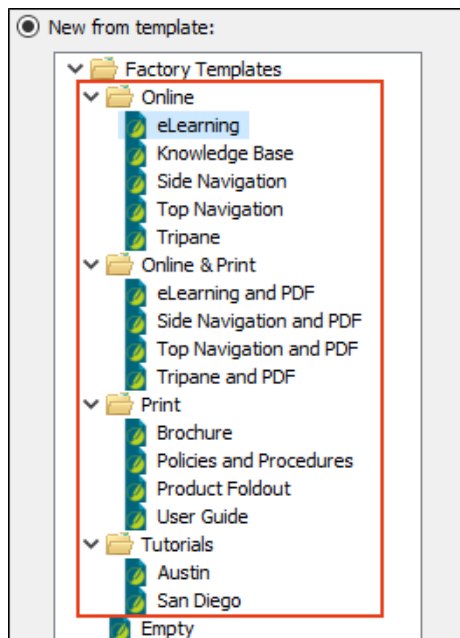
For more information, see the online Help and the *Reviews and Contributions Guide*.

## Flare's Factory Project Templates

You can choose from Flare's many factory project templates when creating a new project.

Flare's factory templates are organized into the following folders:

- **Online** These templates were designed for online output only (although you can always add print-based outputs later).
- **Online & Print** These templates were designed to generate both online and print-based outputs from the same content.
- **Print** These templates were designed for print-based output only (although you can always add online outputs later).
- **Tutorials** This folder contains templates intended to be used with various Flare Tutorials.



# Online Templates

| Template        | Characteristics   |
|-----------------|---|
| eLearning       | <ul style="list-style-type: none"><li>▪ Contains starter topics and other files designed for an <b>eLearning course</b> in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination.</li><li>▪ Lets you integrate course output with an external <b>learning management system (LMS)</b> for tracking results; supports <b>SCORM</b> and <b>x-API</b>.</li><li>▪ Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li></ul> |
| Knowledge Base  | <ul style="list-style-type: none"><li>▪ Contains starter topics and other files designed for an <b>online knowledge base</b> in HTML5 format. If you intend to use Flare to generate an online knowledge base, this project demonstrates one approach you may consider.</li><li>▪ Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li></ul>  |
| Side Navigation | <ul style="list-style-type: none"><li>▪ Contains starter topics and other files intended for online HTML5 output that looks like a <b>modern website with navigation on the side (left or right)</b>.</li><li>▪ Offers a <b>frameless</b>, modern alternative to the more traditional tripane format.</li><li>▪ Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li></ul>  |

| Template       | Characteristics   |
|----------------|---|
| Top Navigation | <ul style="list-style-type: none"> <li>Contains starter topics and other files intended for online HTML5 output that looks like a <b>modern website with navigation on the top</b>.</li> <li>Offers a <b>frameless</b>, modern alternative to the more traditional tripane format.</li> <li>Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> </ul> |
| Tripine        | <ul style="list-style-type: none"> <li>Contains starter topics and other files intended for online HTML5 output in a traditional <b>tripane format (navigation pane, toolbar pane, content pane)</b>.</li> <li>Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> </ul>  |

## Online and Print Templates

| Template          | Characteristics   |
|-------------------|---|
| eLearning and PDF | <ul style="list-style-type: none"> <li>Contains starter topics and other files designed for an <b>eLearning course</b> in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination.</li> <li>Lets you integrate course output with an external <b>learning management system (LMS)</b> for tracking results; supports <b>SCORM and x-API</b>.</li> <li>Online HTML5 output allows for <b>interactivity in learning blocks</b> (e.g., selecting answers, viewing feedback and test results). Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> <li>PDF output allows for distribution of a print version of the course, with a one-click option to <b>show or hide answers</b> in the output.</li> </ul> |

| Template                | Characteristics   |
|-------------------------|---|
| Side Navigation and PDF | <ul style="list-style-type: none"> <li>▪ Contains starter topics and other files intended for both online and print-based output.</li> <li>▪ Online HTML5 output looks like a <b>modern website with navigation on the side (left or right)</b>. Offers a <b>frameless</b>, modern alternative to the more traditional tripane format. Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> <li>▪ PDF output is a <b>user guide</b> that includes <b>auto-generation of a TOC, glossary, and index</b>.</li> </ul> |
| Top Navigation and PDF  | <ul style="list-style-type: none"> <li>▪ Contains starter topics and other files intended for both online and print-based output.</li> <li>▪ Online HTML5 output looks like a <b>modern website with navigation on the top</b>. Offers a <b>frameless</b>, modern alternative to the more traditional tripane format. Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> <li>▪ PDF output is a <b>user guide</b> that includes <b>auto-generation of a TOC, glossary, and index</b>.</li> </ul>                  |
| Tripane and PDF         | <ul style="list-style-type: none"> <li>▪ Contains starter topics and other files intended for both online and print-based output.</li> <li>▪ Online HTML5 output uses a traditional <b>tripane format (navigation pane, toolbar pane, content pane)</b>. Includes <b>responsive output</b>, which means the content display changes automatically depending on the width of the screen.</li> <li>▪ PDF output is a <b>user guide</b> that includes <b>auto-generation of a TOC, glossary, and index</b>.</li> </ul>   |

# Print Templates

| Template                | Characteristics   |
|-------------------------|---|
| Brochure                | <ul style="list-style-type: none"><li>Contains two topics and two page layouts <b>designed to create a brochure with three panes.</b></li></ul>   |
| Policies and Procedures | <ul style="list-style-type: none"><li>Contains starter topics and other files <b>designed to produce a policies and procedures manual in PDF format.</b></li><li>Includes <b>content and variables</b> that you can re-use.</li><li>Includes <b>auto-generation of a TOC and index.</b></li></ul> |
| Product Foldout         | <ul style="list-style-type: none"><li>Contains two topics and two page layouts <b>designed to create a four-pane PDF product foldout.</b></li><li>Ideal for <b>brief product instructions.</b></li></ul>  |
| User Guide              | <ul style="list-style-type: none"><li>Contains starter topics and other files <b>designed to produce a user guide in PDF format.</b></li><li>Includes <b>auto-generation of a TOC, glossary, and index.</b></li></ul>   |

# Tutorial Templates

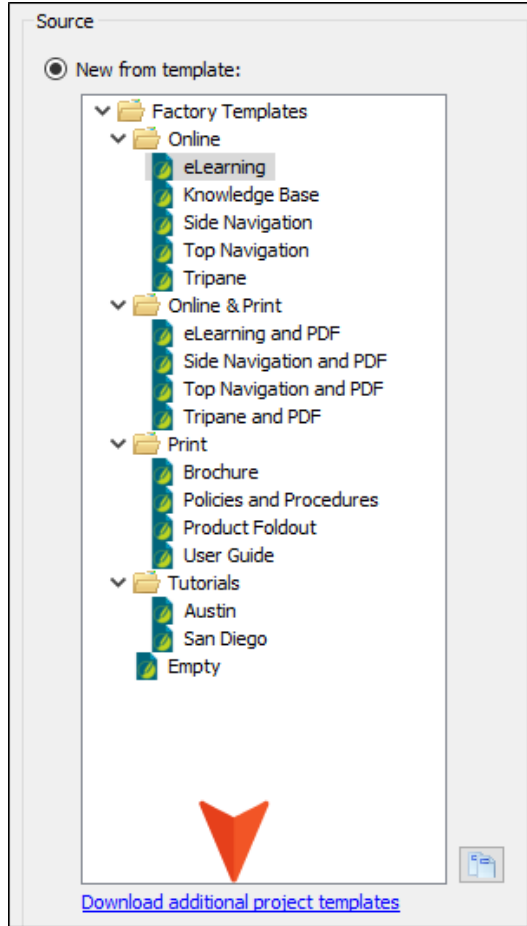
| Template | Characteristics  |
|----------|--|
| Austin   | <ul style="list-style-type: none"><li>Designed to be used alongside various feature tutorials.</li><li>Tutorials help you in the <b>creation of Flare features</b>, such as micro content, context-sensitive Help, snippet conditions, and more.</li></ul> |




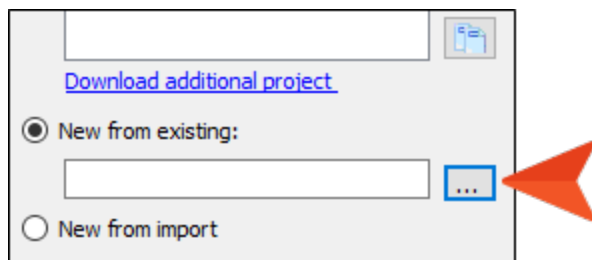
| Template  | Characteristics   |
|-----------|---|
| San Diego | <ul style="list-style-type: none"><li>▪ Designed to be used alongside self-paced <b>Getting Started</b> tutorial.</li><li>▪ Tutorial gives you <b>hands-on experience in Flare</b>, guiding you in the basic steps for creating, developing, and building output.</li><li>▪ End result is a PDF guide and online HTML5 output with <b>top navigation like a modern website</b>, instead of the more traditional tripane format.</li></ul> |

# Downloading Additional Project Templates

If you want to use one of the many other templates available from the MadCap Software website (including older ones that once were available in this wizard), you can click a new link to browse the templates and download them.



After downloading a project template, you can unzip it and save it to a location on your computer. Then, next to **New from existing**, click  and select that project's main .flprj file.



**CHAPTER 3**

---

# Process for Templates

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

This chapter discusses the following:


- Creating Template Folders .....20
- Creating Templates .....21
- Managing Templates ..... 27
- Changing Project Templates .....29

# I Creating Template Folders

The first step in using custom templates is to create a template folder, simply by selecting a folder that already exists. The template folder is simply the place where you will store your template files. You can have as many template folders as you need in order to hold all of your template files.

In addition to selecting a folder on your local drive, you can also select a folder on a network, even on a SharePoint server (if you have previously connected to one). When you save a file (e.g., topic, page layout) as a new template and select a template folder, the appropriate template subfolder is added to that folder (e.g., topic templates are stored in a subfolder called "Content"; page layout templates are stored in a subfolder called "PageLayouts"). As a result, those files become accessible as templates when you create new features in Flare. Selecting a folder on a network is a great way to share template files with other Flare users.

## How to Create a Template Folder

1. Select **Tools > Manage Templates**. The Template Manager opens.
2. Click .
3. In the Select dialog, find and select the folder where you want to store template files.
4. After you have selected the folder, click **OK**.
5. In the Template Manager, click **Close**.

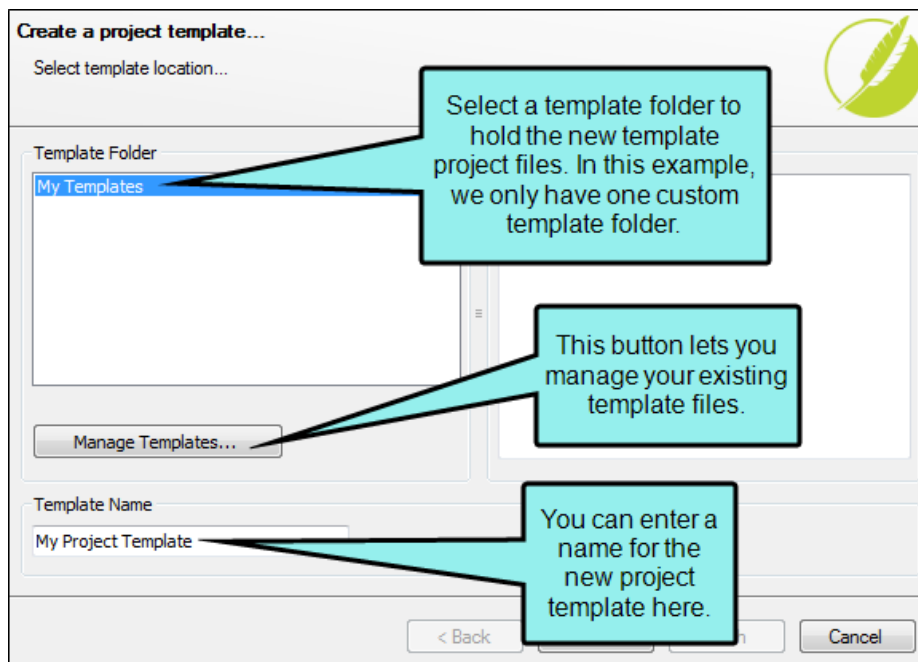
# Creating Templates

After creating a template folder, you can add one or more template files to it. A template is simply an existing file or element of the same type that you are creating (e.g., a project, topic file, target file, snippet file).

You can create templates of entire projects or individual files within a project. There are two ways to create a template from an individual file: (1) with the file open and (2) from the Template Manager.

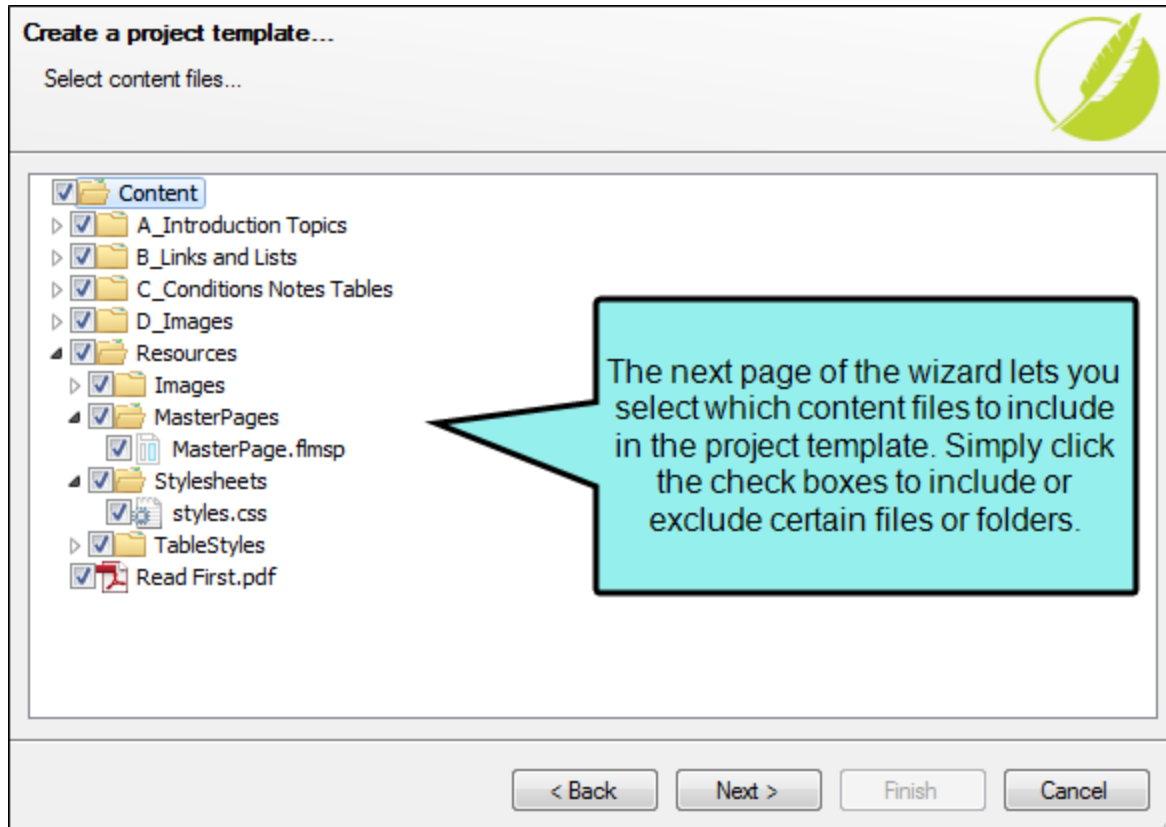
## How to Create a Template of an Entire Project

1. Create a project, adding all of the content, elements, and settings that you want to be part of the project.
2. Select **Project > Save Project As Template**.
3. In the **Template Folder** section, select the folder where you want to store the template files.
4. The **Template Name** field, enter a name for the new template.



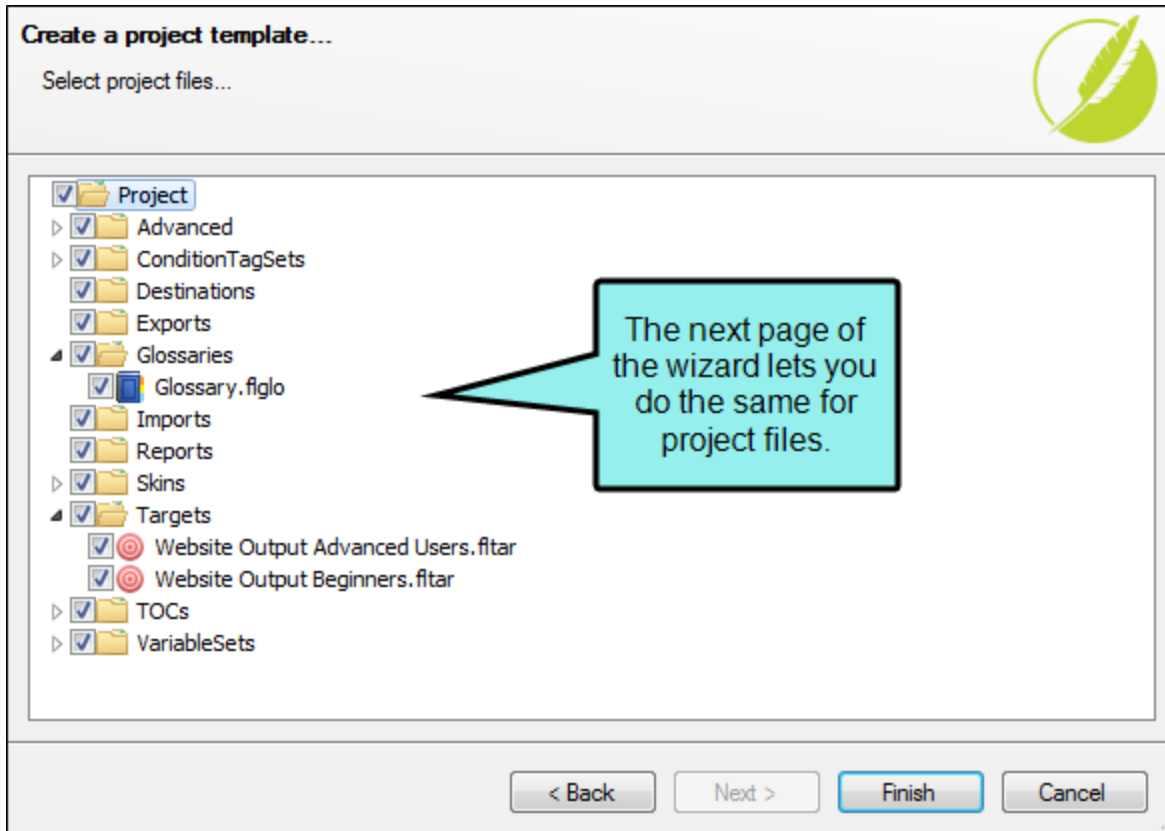
5. Click **Next**.

6. On the next page of the wizard, make sure a check mark is next to each content folder or file that you want to include in the project template. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary.



7. Click Next.

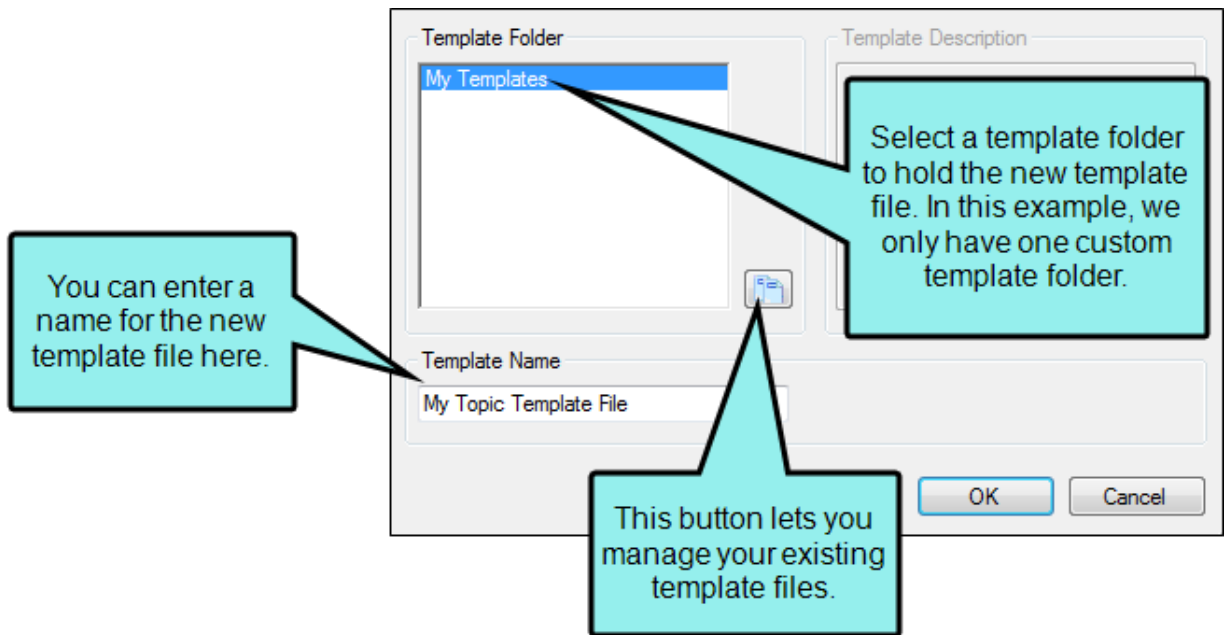
- On the next page of the wizard, make sure a check mark is next to each project folder or file that you want to include in the project template. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary.



- Click **Finish**.

# How to Create a File Template—File Open



1. In Flare create the element (e.g., topic, target, skin, template page ) that you want to use as a template.
2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.
3. Select **File > Save > Save As Template**.
4. In the **Template Folder** section, select the folder where you want to store the template file.
5. The **Template Name** field, enter a name for the new template.

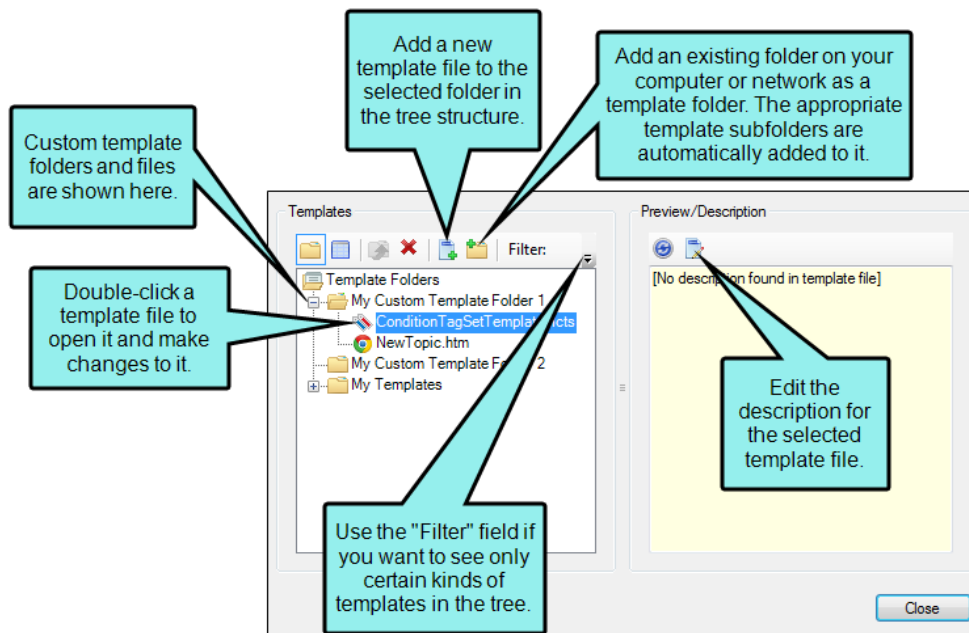


6. Click OK.



# How to Create a File Template—Template Manager

1. In Flare create the element (e.g., topic, target, skin, template page) that you want to use as a template.
2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.
3. Click  to save your work.
4. Select **Tools > Manage Templates**.
5. In the built-in tree, find and select the folder where you want to store the template file.
6. Click .




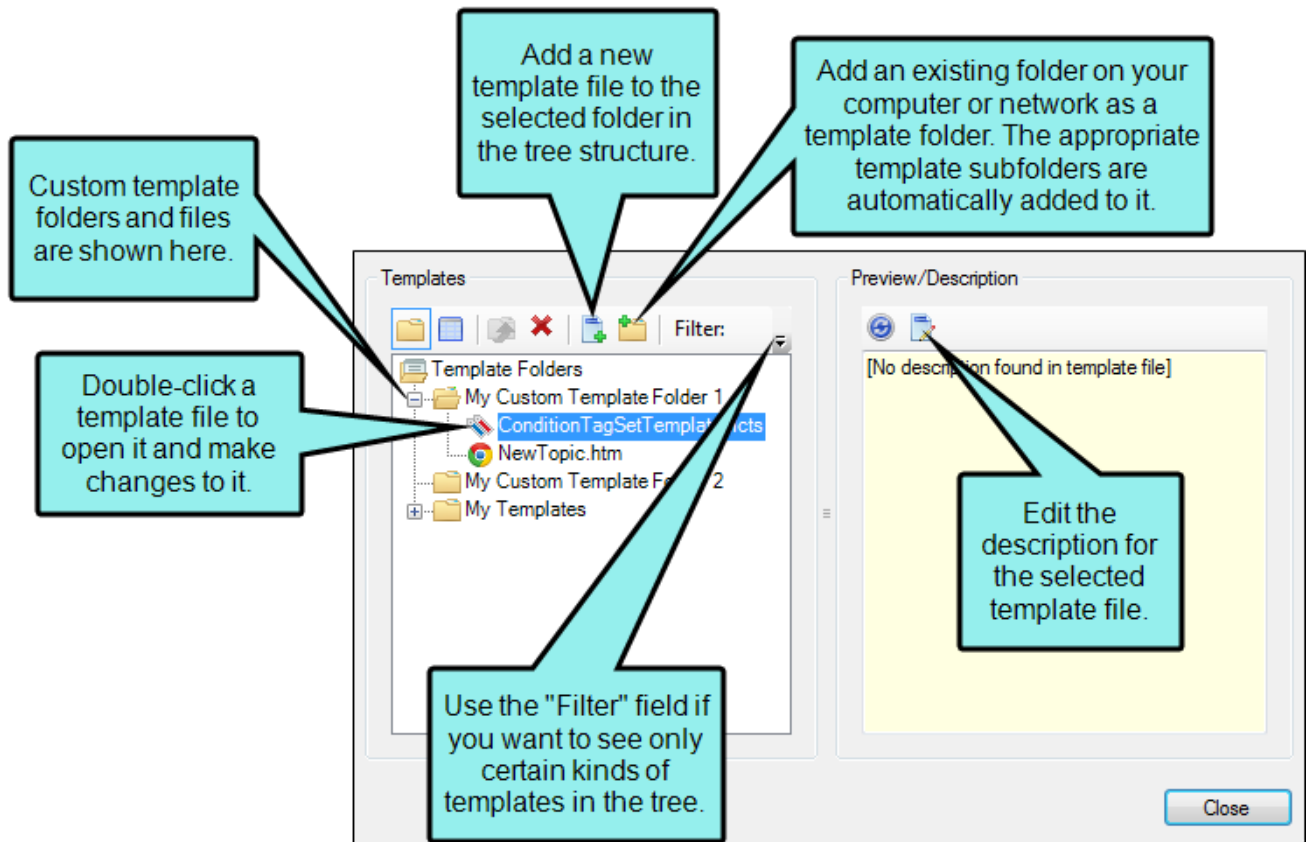
7. In the dialog that opens, find and double-click the file that you want to add as a template.
8. In the Save As Template dialog click **OK**.
9. In the Template Manager dialog click **Close**.

# What's Next?

After you create a template, you can select it whenever you create a new element of the same type (e.g., you can select a topic template when creating a new topic).


# Managing Templates

You can manage your template files from within the Template Manager dialog. This dialog can be opened from the **Tools** ribbon or menu, by clicking the **Manage Templates** button  that can be found in a variety of template-related dialogs (such as the Save As Template dialog).




## Adding Template Files

You can add files to any of your existing template folders. Therefore, those files become available as templates when you create new features in Flare. See "Creating Templates" on page 21.


To add a template file in the Template Manager, select the folder where you want it to be stored and then click .

# Creating Template Folders


You can find and select an existing folder on your local drive or on a network, even on a SharePoint server (if you have previously connected to one). When you save a file (e.g., topic, page layout) as a new template and select a template folder, the appropriate template subfolder is added to that folder (e.g., topic templates are stored in a subfolder called "Content"; page layout templates are stored in a subfolder called "PageLayouts"). As a result, those files become accessible as templates when you create new features in Flare. This is a great way to share template files with other Flare users on your network. See "Creating Template Folders" on page 20.

To create a template folder in the Template Manager, click .

# Opening and Editing Template Files

If you want to open a template file to make changes to it, you can double-click it in the Template Manager. You can also right-click the file and select **Open**. When you open a template file, it opens in the appropriate editor, just as a regular file would open. However, the following message displays at the top of the editor to let you know that the file you are modifying is a template file that is not located in the current project:  The file you are editing exists outside of the current project.

# Editing Template Descriptions


Many template files can include a template description, which is shown when you work in the Template Manager or if you select the template when creating a feature in Flare. In the Template Manager, you can edit the description for any XML template files, except XHTML files. For example, you can edit descriptions for target, skin, TOC, and destination template files, but you cannot edit descriptions for topics, snippets, stylesheets, images, and multimedia files. You might find this feature useful if you are working with a team of writers and need a good description of each template; therefore, each author will easily know the purpose of the template. To create or edit the description for a template in the Template Manager, first select the template file in the built-in tree and then click . Then type a description for the template and click **OK**.

# I Changing Project Templates

You might already have a Flare project but decide you want to use the look from a different template. For example, maybe you initially selected a template that is shown in Flare's Start New Project Wizard, but then you later find a template on the MadCap Software website that you like better. There isn't a feature dedicated to make a change like this, with built-in mapping, etc. However, you can use a combination of some Flare features to make it work. The following explains how to change templates using Flare's Global Project Linking and exporting features.

# How to Change Project Templates

1. Download the template you want to use, or create a new, small project based on a template.
2. Open that new project in Flare (if you downloaded a project template, you can double-click the Flare zip file to unpack and open it), and add a Flare project import file (**Project > New > Import File > Add Flare Project Import File**).

 **NOTE** Alternatively, you can add the project import file to your original project and import files from the new template project into that. In that case, you would probably want to import mainly design-related files (e.g., stylesheets, template pages, skins). However, there will probably be less work afterward if you import mostly content files from the original project into the new template project, then export or name it.

3. In the Project Import Editor, select the source project and use the fields to choose the files you want to import. If you are importing from the original project into the new template project, you probably want to limit your selections to non-design files (e.g., choose files such as topics, snippets, images, and variables), although in some cases you might decide to keep some design files (e.g., stylesheet, page layouts). When finished, save your work, click **Import**, then **Accept**.
4. Delete any of the topics and other files that were part of the template project and you do not plan on using (e.g., topics, images, TOC). Also, in the Project Organizer, expand the **Imports** folder and delete the import file (unless you plan on re-importing some more files).
5. Generate and view output and see what kinds of manual changes you might need to make. For example, if you imported your original stylesheet, you might need to link it to the one(s) in the new project, or you might need to re-apply some styles to some content.
6. You probably want to rename the new project. An easy way to do this is to select **Project > Export Project**, which gives you an opportunity to rename the project and select a location for it.

## APPENDIX

---

# PDFs

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

## I Tutorials

*Getting Started Tutorial*

*Autonumbers Tutorial*

*Back-to-Top Button Tutorial*

*Context-Sensitive Help Tutorial*

*Custom Toolbar Tutorial*

*eLearning Tutorial—Basic*

*eLearning Tutorial—Advanced*

*Image Tooltips Tutorial*

*Lists Tutorial*

*Meta Tags Tutorial*

*Micro Content Tutorial—Basic*

*Micro Content Tutorial—Advanced*

*Responsive Output Tutorial*

*Single-Sourcing Tutorial*

*Snippet Conditions Tutorial*

*Styles Tutorials*

*Tables Tutorial*

*Word Import Tutorial*

# | Cheat Sheets

*Context-Sensitive Help Cheat Sheet*

*Folders and Files Cheat Sheet*

*Learning & Development Cheat Sheet*

*Lists Cheat Sheet*

*Micro Content Cheat Sheet*

*Print-Based Output Cheat Sheet*

*Search Cheat Sheet*

*Shortcuts Cheat Sheet*

*Structure Bars Cheat Sheet*

*Styles Cheat Sheet*



# I User Guides

*Accessibility Guide*

*Analysis and Reports Guide*

*Architecture Guide*

*Autonumbers Guide*

*Branding Guide*

*Condition Tags Guide*

*Context-Sensitive Help Guide*

*Eclipse Help Guide*

*eLearning Guide*

*Getting Started Guide*

*Global Project Linking Guide*

*HTML5 Guide*

*Images Guide*

*Import Guide*

*Indexing Guide*

*Key Features Guide*

*Lists Guide*

*MadCap Central Integration  
Guide*

*Meta Tags Guide*

*Micro Content Guide*

*Navigation Links Guide*

*Plug-In API Guide*

*Print-Based Output Guide*

*Project Creation Guide*

*QR Codes Guide*

*Reviews & Contributions With  
Contributor Guide*

*Scripting Guide*

*Search Guide*

*SharePoint Guide*

*Skins Guide*

*Snippets Guide*

*Source Control Guide: Git*

*Source Control Guide:  
Perforce Helix Core*

*Source Control Guide:  
Subversion*

*Source Control Guide: Team  
Foundation Server*

*Styles Guide*

*Tables Guide*

*Tables of Contents Guide*

*Targets Guide*

*Template Pages Guide*

*Templates Guide*

*Topics Guide*

*Touring the Workspace Guide*

*Transition From FrameMaker  
Guide*

*Translation and Localization  
Guide*

*Variables Guide*

*Videos Guide*

*What's New Guide*