madcap software

USER GUIDE

MADCAP FLARE 2024

What's New

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THIS PDF WAS CREATED USING MADCAP FLARE.

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CHAPTER 1

Introduction

Flare 2024 release notes can be found here.

Following are the new features available in Flare 2024.

For more information about each feature discussed in this manual, open the online Help and refer to the "What's New" topic. Links are provided in some feature descriptions, taking you to topics that contain additional information and steps.

- "Publish to Syndicate" on page 7
  - Publish output files to a Xyleme Syndicate destination
  - Use Syndicate as your cloud-based content delivery platform for multi-file or single-file documents (e.g., technical documentation, eLearning material)
  - Manage, share, and give access to hosted content
  - Syndicate includes beneficial hosting features (e.g., a global content delivery network (CDN), federated search, scheduling activation/deactivation dates for output access)

- "Reducing Flicker in Frameless TOC Navigation" on page 21
  - Supported in HTML5 frameless output (HTML5 Side or Top Navigation)
  - Embed visible table of contents entries when loading topics
  - Reduces "flicker" effects in the main TOC navigation

- FrameMaker 2022 Support
  - Import files from FrameMaker 2022

- "Upcoming Deprecated Features" on page 37
  - List of features that will be deprecated
  - Recommended replacements for deprecated features

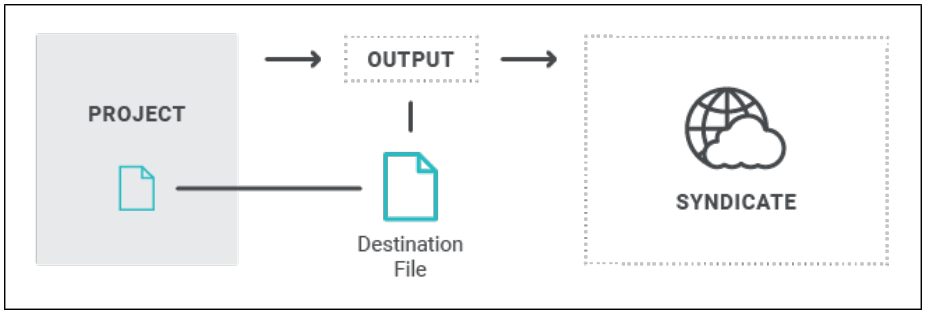
CHAPTER 2

Publish to Syndicate

Supported In:

NOTE Since HTML5 and Clean XHTML are multi-file output types, a zip file is created before publishing. PDF and Word are single-file output types, so a zip file is not needed.

Flare supports integration with Xyleme Syndicate; a cloud-based content delivery platform that extends the reach capabilities of your content. From Flare you can automatically publish output files to a selected folder on a Syndicate server. By uploading Flare output to Syndicate, you can make it output accessible in a variety of ways internally and externally. It is also a great way to collaborate with instructional designers and others in your company.



This chapter discusses the following:

Syndicate Benefits 9

Before You Start Publishing to Syndicate 12

How to Create a Destination File 15

How to Publish to Syndicate 18

Post-Publishing in Syndicate 20

Syndicate Benefits

Syndicate supports the delivery and analysis of documentation for both eLearning and technical communication. It is a useful platform for administrators who manage content and for learners who consume content. Syndicate provides a way for organizations to centralize many types of documents, search the repository, allow multiple learning management systems (LMSs) to access the same content, and track interactions users have with content.

Following are some of the Syndicate hosting features that are particularly appealing to technical communicators.

Hosting Feature	Description
Access to outputs	Syndicate is a content delivery system. Each document (e.g., eLearning, video, PDF, HTML) can have one or more URLs associated with it. Content can be syndicated out via shared links (public or private) to other places such as LMSs, web applications, internal help desks; and from there provide direct access.
Analytics	Syndicate analytics centers on tracking user interactions with content. It can track how users consume content such as individual topics or videos. For eLearning it can manage millions of records in its built-in learning record store (LRS).
Content delivery network (CDN)	Syndicate uses a global network of interconnected servers that speeds up loading data to end users.
Custom domain	Syndicate supports domain white labeling which enables you to present your organization on a branded, customized URL.
Faceted searches with taxonomies	Syndicate supports content search through a predefined set of attributes such as resource type, format, language, etc. It also offers a customizable taxonomy that can enhance a search. This is primarily useful internally within Syndicate.

Hosting Feature	Description
Federated searches	A federated search lets you search for content across multiple data sources (in this case, different outputs uploaded to Syndicate). You can search for content in the Syndicate portal directly, but this only looks at documents residing in Syndicate. Therefore, it is primarily useful for internal purposes. However, the entire search experience can be externalized to a third-party application via an integration leveraging Syndicate's expansive application programming interface (API) library. NOTE When search is externalized, it is technically possible to federate the search. The integration might query content residing in Syndicate but also content in other libraries (e.g., SharePoint, Zendesk, Confluence).
Headless Content via API Shared Integrations	With Syndicate, you can use application programming interface (API) shared integrations to extract specific pieces of content from your output uploaded to Syndicate. This can be especially useful with any micro content that you produce in a Flare project. These extracted content objects can then be displayed in other applications or services that your company uses, essentially producing headless content.
Multi-Channel eLearning Management	eLearning packages (compliant with SCORM and xAPI) that originate from Flare can be uploaded to Syndicate. In Syndicate you can manage eLearning packages with learning record store (LRS) functionality.
Permissions	Access to content in Syndicate can be controlled at the folder and document levels using a group-based permission model.
Single sign-on (SSO)	Syndicate supports user login with SSO and can work with more than one identity provider (IdP), including authentication access for non-SSO users.

Hosting Feature	Description
Schedule activation dates	The accessibility of a published document can be automated through activation dates (i.e., enabling viewing via a shared link) and deactivation dates (i.e., disabling shared links to the document).
Versioning	Syndicate tracks version histories of a document which facilitates compliance and audits. Versions are established when a document is replaced with a newer uploaded document or republished in the same folder and output profile.

NOTE If you are interested in learning more about Syndicate, contact MadCap Sales. They can provide information about the product, demos, review purchase options, and set up Syndicate accounts.

Upon purchase of Syndicate a unique Portal URL is provided (e.g., https://core-customer.bravais.com), where you can sign into the portal with your credentials (e.g., email and password).

Before You Start Publishing to Syndicate

Following are some steps you should complete and information you should know before you publish from Flare to Syndicate.

> NOTE Xyleme Syndicate is part of the MadCap Software family of products. This documentation assumes you have a Syndicate account set up and a working knowledge of the Syndicate portal. For more information refer to the Syndicate documentation.

Syndicate Side

Following are settings and considerations on the Syndicate side of this process.

API-base vs. Regular URLs

Your Syndicate account has multiple URLs associated with it. The regular user URL (e.g., https://[customer].bravais.com), and the API-base URL (e.g., https://core-[customer].bravais.com).

For example, the company Fictionsoft might be set up with the following.

1) Tenant (or regular user) URL: https://fictionsoft.bravais.com

2) API-base URL: https://core-fictionsoft.bravais.com

It is the Delivery (CORe) API that is used to publish content to Syndicate. The base URL for the API calls is https://core-[domain].bravais.com, where [domain] is the user's domain name. Note that CORe stands for Core Object Repository, and bravais is the legacy name for Syndicate.

You can get to the Syndicate portal through a web browser (if you are not already logged in) by typing your user URL. It will redirect you to the API-base URL.

Default Inactivity Period

The Syndicate server will automatically log out users after a period of inactivity, so you might have to log in again before publishing. The default period of inactivity is 15 minutes, but it can be changed per customer on the Syndicate account.

Multilingual Targets

Multilingual targets in Flare can be published to Syndicate.

Publishing

If you do not specify a Syndicate publishing destination in Flare, you can prepare the output and upload it to the Syndicate portal manually. After you build the files in Flare, open the Output folder. For multi-file output types, select all the files and add them to a compressed zip folder. Then, from the Syndicate Admin Portal, add the document by selecting the zip file or single-file output type to upload the document.

> NOTE When publishing manually, you might want to enter Index.htm in the Target Editor's Output File field. This will ensure that a preview of the document displays in the Syndicate portal.

Flare Side

Following are settings and considerations on the Flare side of this process.

eLearning Material

If you are using Syndicate as the destination type to host output, note the following if you select eLearning options in the target (i.e., you choose to generate a SCORM or xAPI packaging). When Flare builds output for HTML5 that includes eLearning, it generates an LMSPackage folder in the project's output folder with a zip file. But when Flare publishes to Syndicate, only the LMS package is automatically uploaded (and not the whole project zip file).

Flare to Syndicate Only

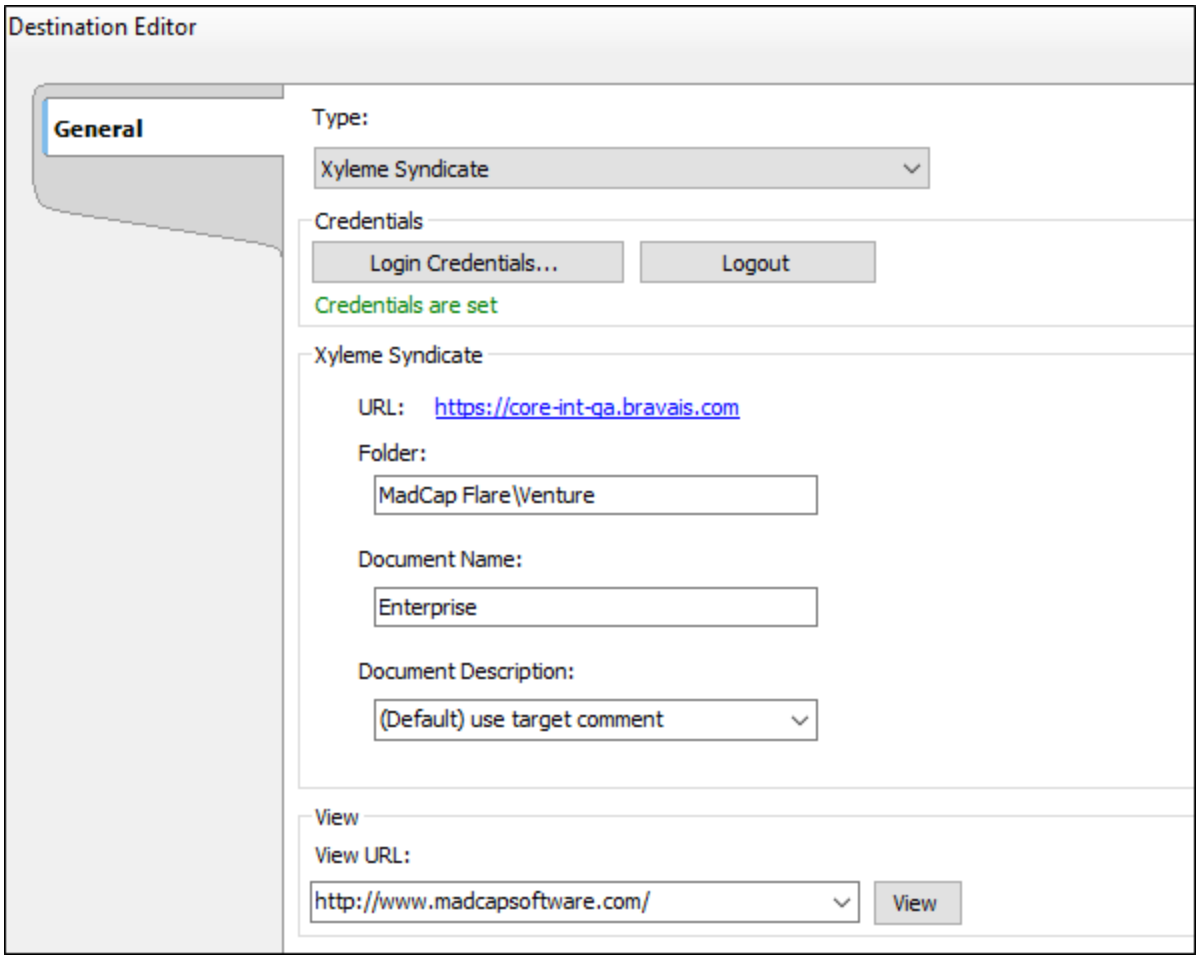
Flare supports sending output to Syndicate but not importing content from it. Be aware that every time you republish an already uploaded document to the Syndicate server, it creates a new version of it.

How to Create a Destination File

The first step in publishing output is to add a destination file to your project. A destination file has an .fldes extension and is stored in the Project Organizer under the Destinations folder.

1. Open the Project Organizer.
2. Open an existing destination file or add a new one.

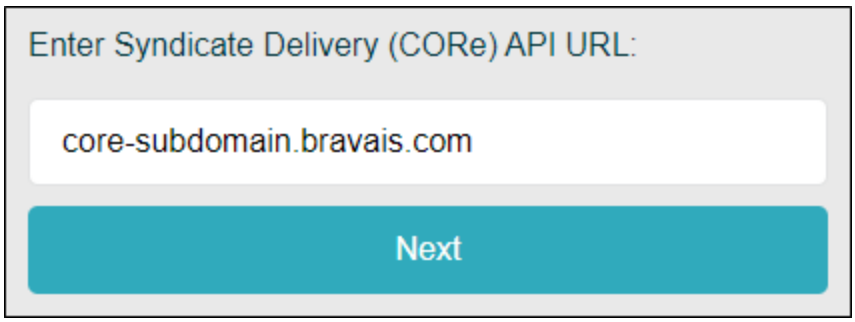
   After you add a destination file, the Destination Editor opens. Use this editor to create the publishing destination (i.e., to publish or send files to the Syndicate server for hosting the output). Populate the editor with your destination information.



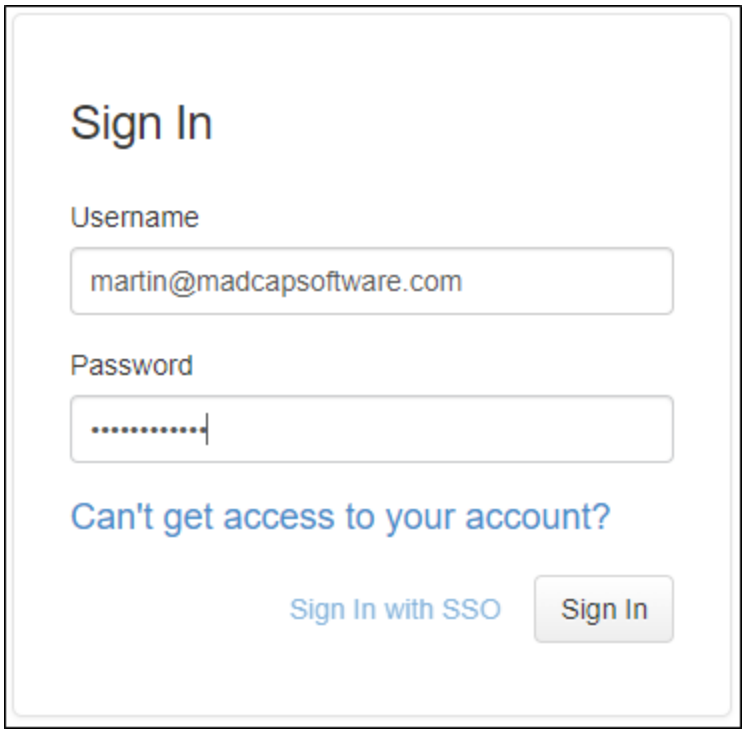
3. In the Destination Editor, click the Type drop-down field, and select Xyleme Syndicate.
4. Click Login Credentials.

5. In the Syndicate Login dialog, enter the **Syndicate Delivery (CORe) API URL** (e.g., core-subdomain.bravais.com). Click **Next**.

   For most users, you only need to replace the word "subdomain" with your own subdomain (e.g., fictionsoft), and leave the rest of the URL as it is.



6. In the Sign In screen, enter a **Username** and **Password**, and press **Enter** or the **Sign In** button. After the initial sign in, you will not have to log in every time. (If your organization is set up with SSO, click Sign In with SSO to enter your credentials.)



7. Complete the **Xyleme Syndicate** fields.
    - **URL** This is the API-base URL for accessing your Syndicate portal.
    - **Folder** Enter the folder path in the text box to publish to syndicate. If you want to publish to nested folders, you can use a backslash or a forward slash in the path (e.g., MadCap Flare\Venture, Training/Module).
    - **Document Name** The document name defaults to the target name (referring to the Target Editor's General tab Output File field). The document name and the output file are customizable, but use caution since different combinations of updates to the fields can yield varying results for the document name in Flare's output folder, and for the document name and source file name in the Syndicate portal.
    - **Document Description** The description defaults to the target comment. If you customize the description in the Destination Editor it overrides the comment found in the Target Editor's General tab. The default or description entered displays with the document details in the Syndicate portal.

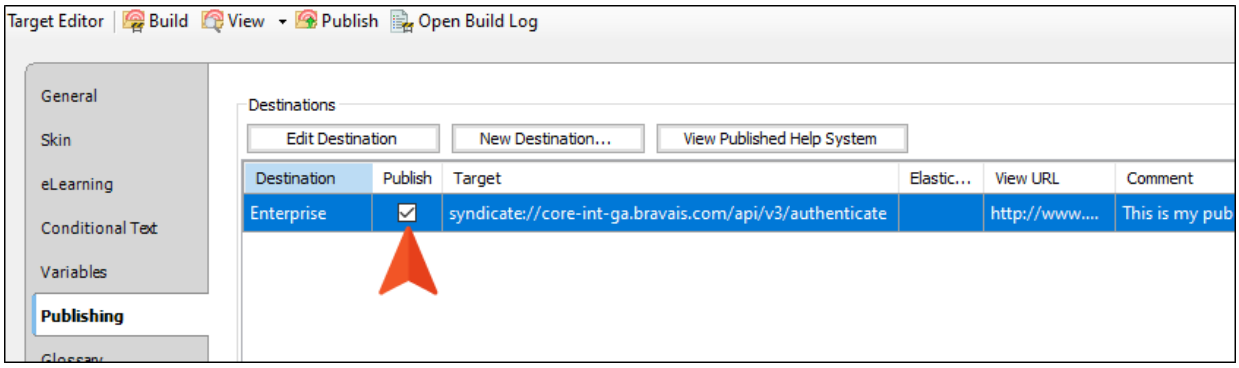
    > **WARNING** Since a destination is a single file that multiple targets can use, be careful when changing the Document Name or the Document Description information in the Destination Editor. If you keep the default values, it will keep each target's output unique when you publish.

8. (Optional) In the **View URL** field, you can enter an address corresponding to your publish destination. This field is for your own internal purposes, and is simply a quick way for you to open the output associated with the destination by clicking the button to the right.
9. Click to save your work.

How to Publish to Syndicate

After everything is set up and you have created a destination file, you can associate that file with a target. Then you can build and publish the output.

1. Open your target (e.g., HTML5, PDF, Word, Clean XHTML).
2. Select the **Publishing** tab.
3. Next to your Syndicate destination, select the **Publish** check box.



4. Click to save your work.
5. In the local toolbar, click **Build**.

6. After the target is finished generating, click **Publish**.

NOTE If you make changes (e.g., you update the output file name, target name) after you have published content, rebuild the output before publishing again. Rebuilding the output ensures that the published content can be previewed properly in Syndicate.

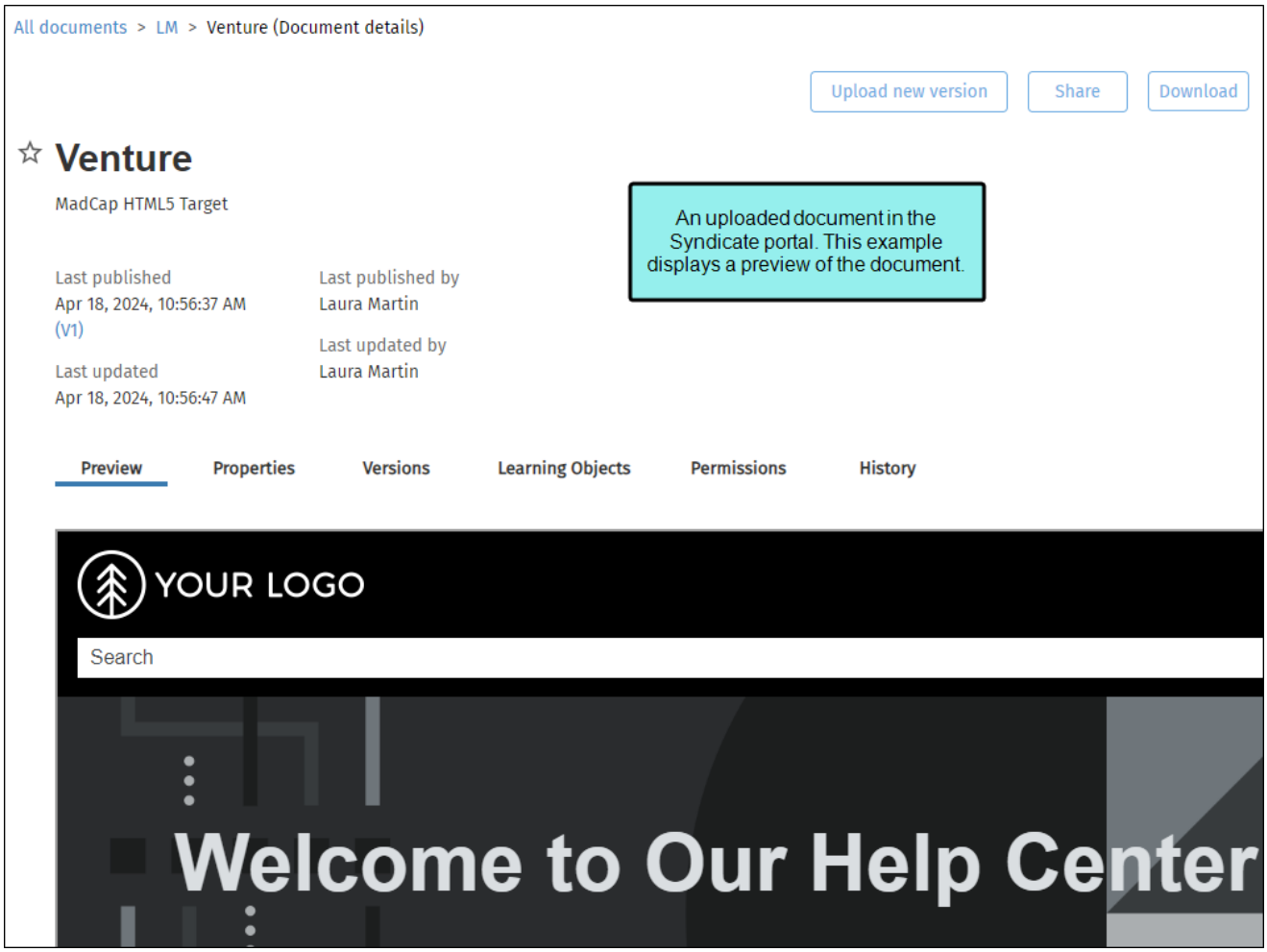
NOTE If you publish Clean XHTML output to the Syndicate server, be aware that the document will upload but the preview will not display in the portal.

TIP Since you have many options for publishing content to Syndicate, you might find it helpful to practice publishing output to a test development instance using different settings in Flare. Once you identify results that you like in Syndicate, you can publish output to production.

Post-Publishing in Syndicate

Once a document is uploaded to Syndicate, select it for a document preview and its details. You can look at or update items such as document properties, versions, permissions for controlling document access, and the history of the document.

It is advisable to get familiar with the Syndicate portal since there are many features and resources available—for making the most of it as your content delivery platform. For more information see the Syndicate documentation.



CHAPTER 3

Reducing Flicker in Frameless TOC Navigation

Supported In:

> NOTE This feature is supported in HTML5 Side and Top Navigation skins, but not in HTML5 Tripane skins.

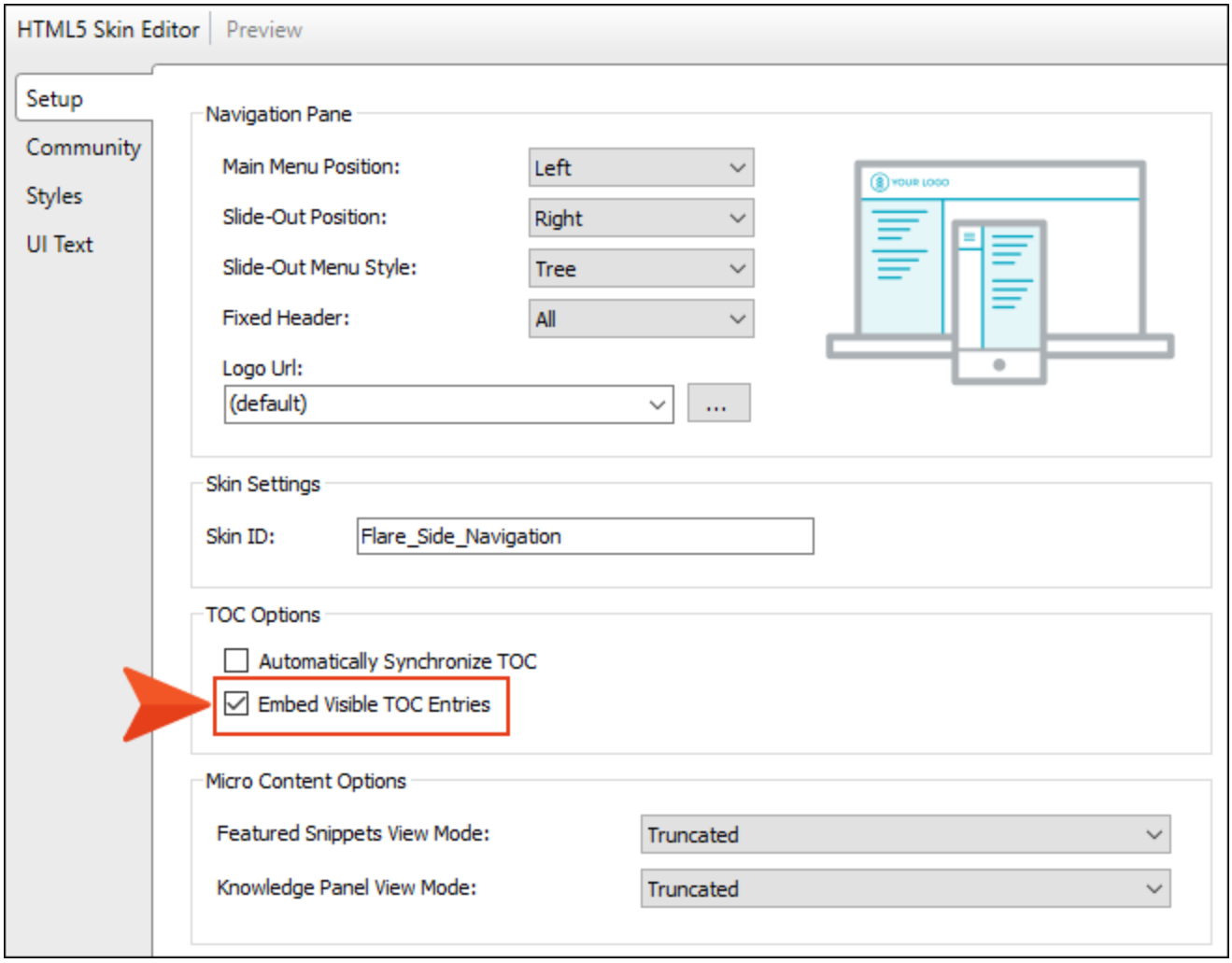
There is a new option in the Skin Editor for frameless output (HTML5 Side or Top Navigation) that can help reduce "flicker" effects that users might see when clicking in the main table of contents (TOC) navigation. This option is called "Embed Visible TOC Entries."

This chapter discusses the following:

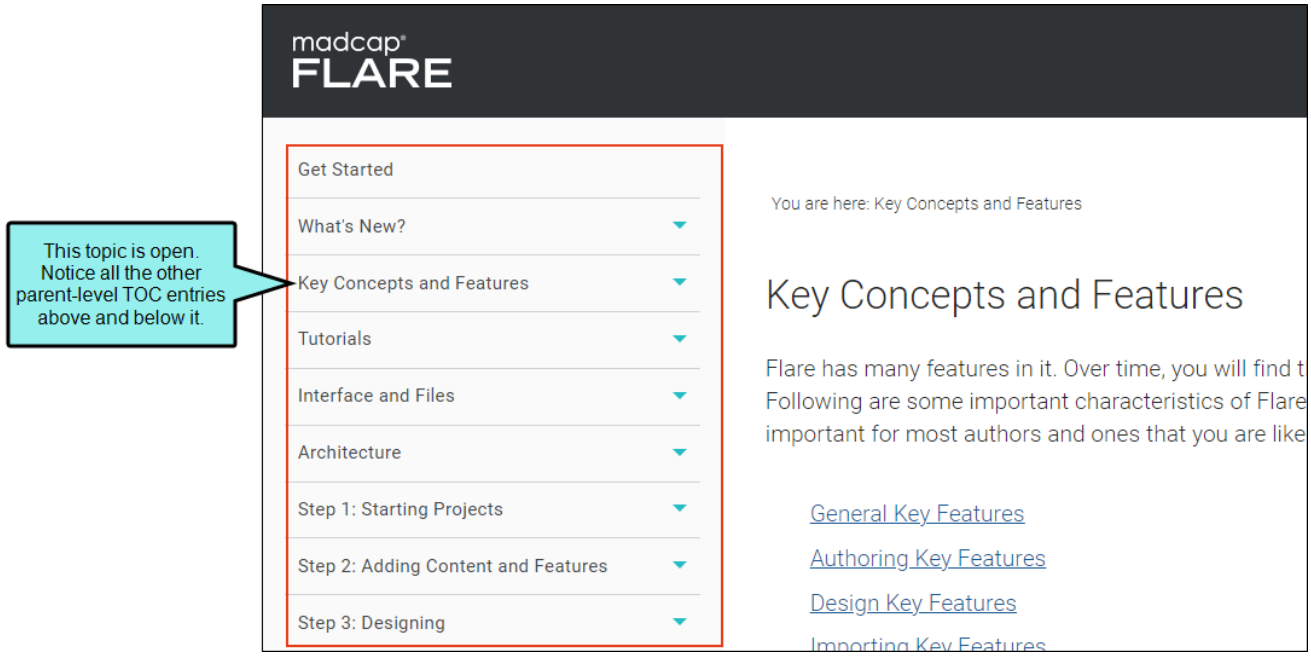
Embed Visible TOC Entries 22
Pros and Cons of Embedding Visible TOC Entries 25
Related Synchronization Options 26

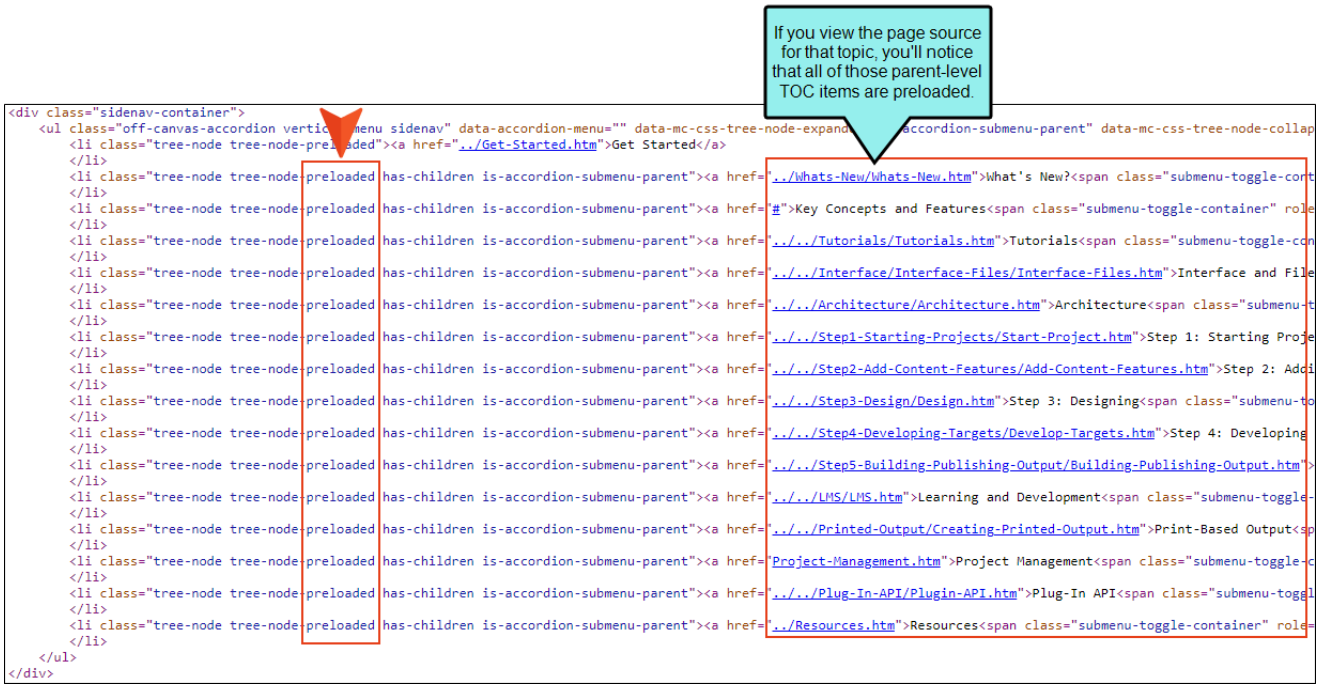
Embed Visible TOC Entries

This option is available on the Setup tab of the Skin Editor.



When it is enabled, the top-level (i.e., parent) TOC items are preloaded (i.e., embedded) into the output topics. Because of this, the movement (or "flicker") when opening topics is less significant.


This topic is open. Notice all the other parent-level TOC entries above and below it.
madcap FLARE
Get Started
What's New?
Key Concepts and Features
Tutorials
Interface and Files
Architecture
Step 1: Starting Projects
Step 2: Adding Content and Features
Step 3: Designing
You are here: Key Concepts and Features
Key Concepts and Features
Flare has many features in it. Over time, you will find t
Following are some important characteristics of Flare
important for most authors and ones that you are like
General Key Features
Authoring Key Features
Design Key Features


If you view the page source for that topic, you'll notice that all of those parent-level TOC items are preloaded.

<ul class="off-canvas-accordion
<li class="tree-node tree-node-preloaded">Get Started
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../Whats-New/Whats-New.htm">What's New?
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="#">Key Concepts and Features
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Tutorials/Tutorials.htm">Tutorials
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Interface/Interface-Files/Interface-Files.htm">Interface and File
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Architecture/Architecture.htm">Architecture
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Step1-Starting-Projects/Start-Project.htm">Step 1: Starting Proje
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Step2-Add-Content-Features/Add-Content-Features.htm">Step 2: Addi
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Step3-Design/Design.htm">Step 3: Designing
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Step4-Developing-Targets/Develop-Targets.htm">Step 4: Developing
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Step5-Building-Publishing-Output/Building-Publishing-Output.htm">
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../LMS/LMS.htm">Learning and Development
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Printed-Output/Creating-Printed-Output.htm">Print-Based Output
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="Project-Management.htm">Project Management
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../../Plug-In-API/Plugin-API.htm">Plug-In API
<li class="tree-node tree-node-preloaded has-children is-accordion-submenu-parent"><a href="../Resources.htm">Resources

NOTE The "Embed Visible TOC Entries" option does not remove flicker effects altogether, but it does reduce them. Also, it affects the primary navigation (Side Navigation or Top Navigation) produced by the TOC; it does not affect minor navigation, such as that created from menu proxies.

NOTE Certain circumstances (such as embedding a particular font) can still result in flicker effects in the topic output as a whole. The "Embed Visible TOC Entries" option does not reduce that type of flicker. It only affects the flicker in the TOC navigation.

Pros and Cons of Embedding Visible TOC Entries

The "Embed Visible TOC Entries" option might be the best situation for some users, but not necessarily for everyone. To determine if it's best for you, consider the pros and cons.

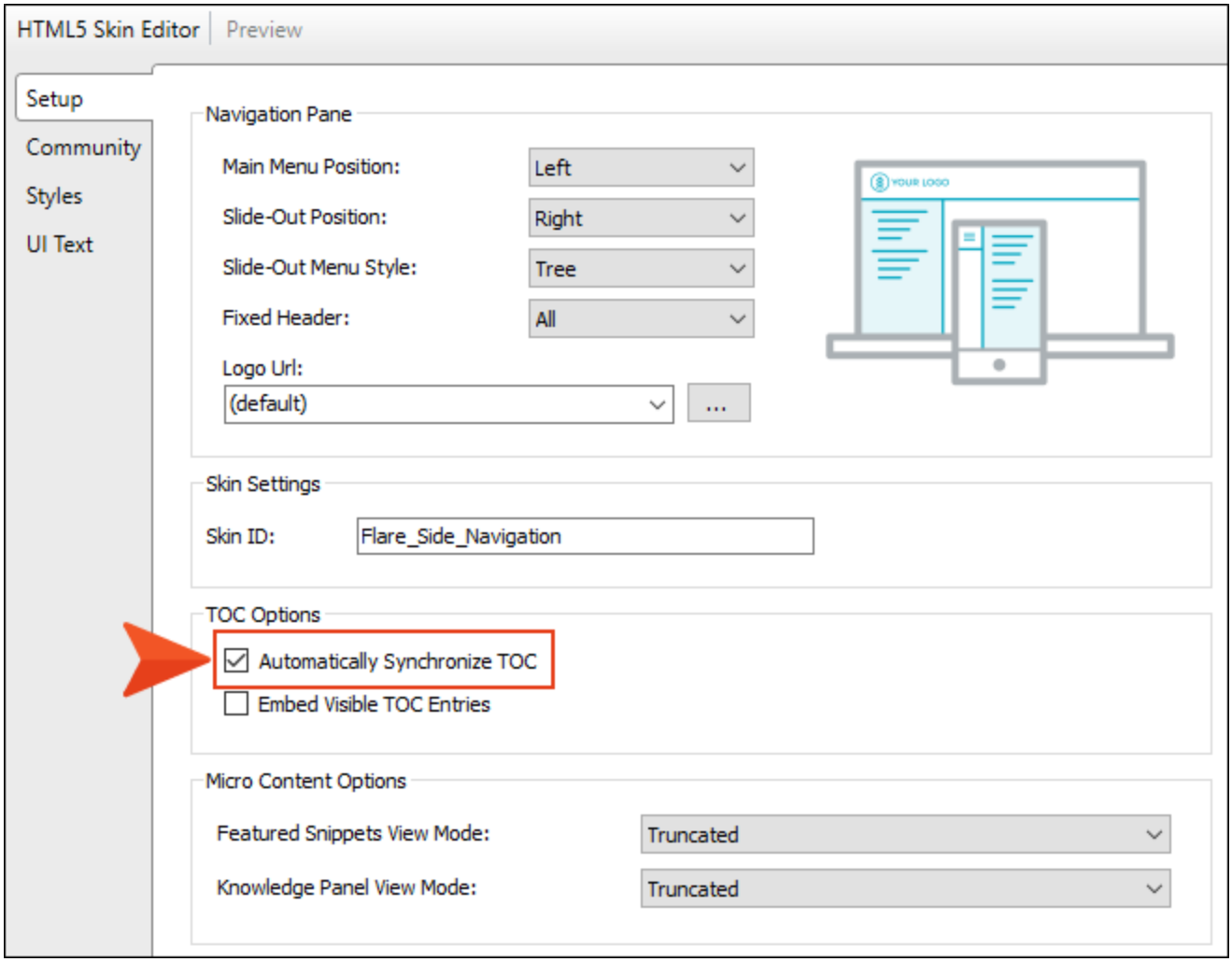
Pros	Cons
Reduces flickering in the main TOC navigation	Increases the time to generate the output ☆ EXAMPLE Sample from a large Flare project: Option disabled = 42 minutes Option enabled = 49 minutes
Less distracting for users	Increases the output size ☆ EXAMPLE Sample from a large Flare project: Option disabled = 519 MB Option enabled = 560 MB

Related Synchronization Options

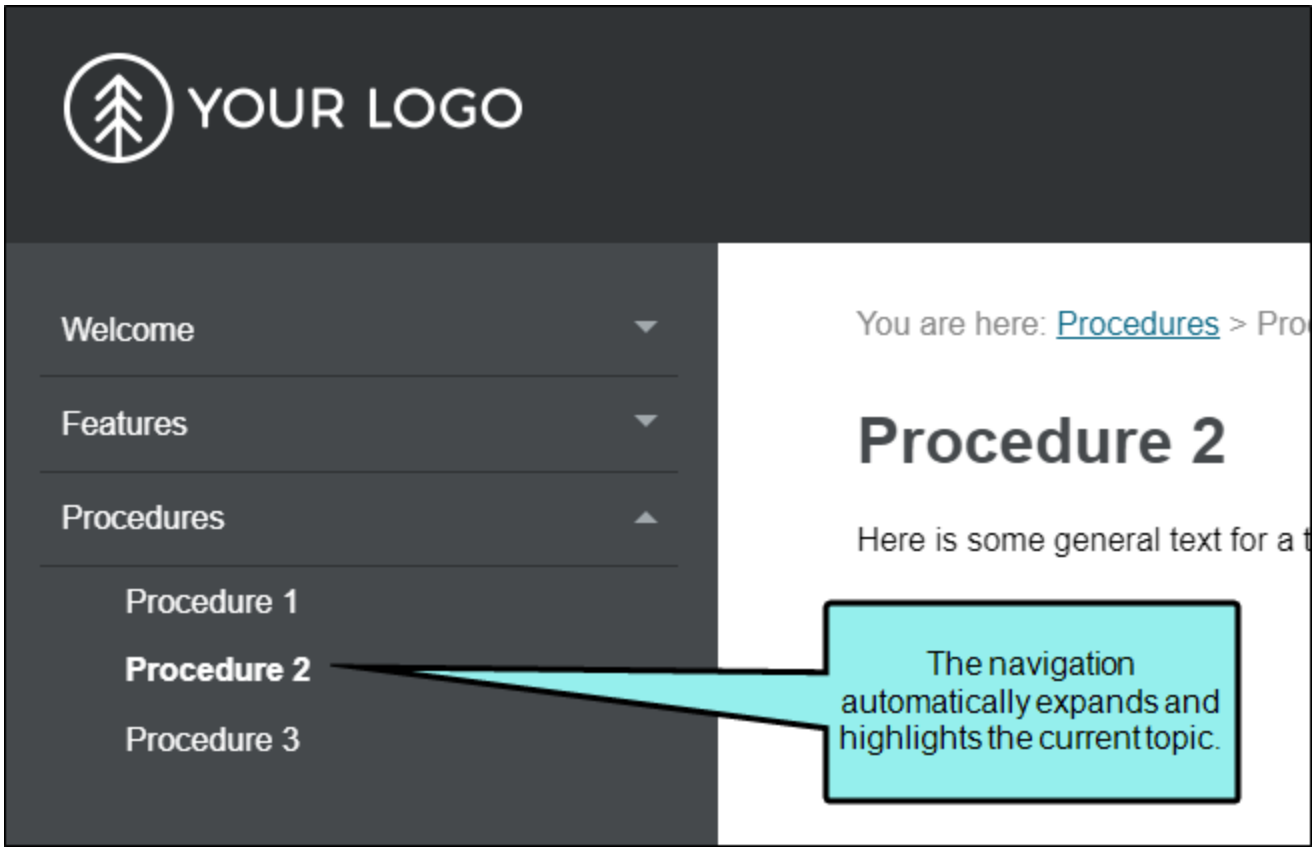
The "Embed Visible TOC Entries" option is related to two other existing options (one in the Skin Editor and another in the Target Editor). These options are used to synchronize open topics with the TOC and other navigation elements.

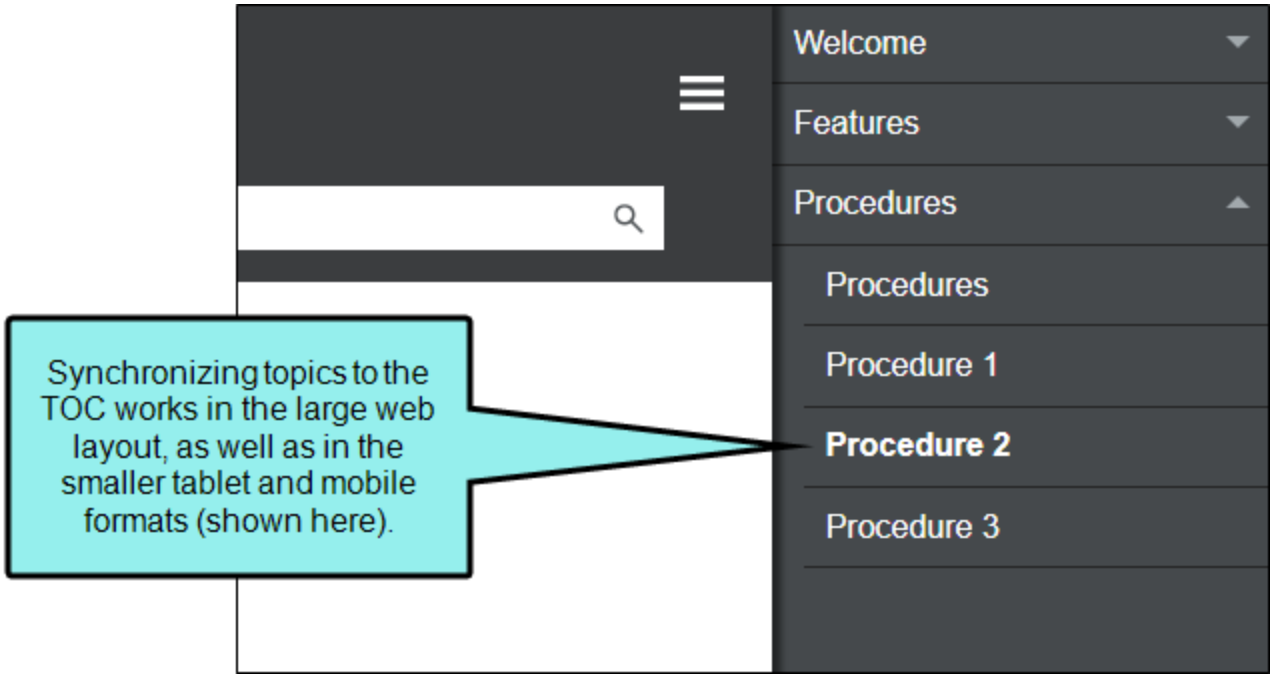
Automatically Synchronize TOC

This option is available on the Setup tab of the Skin Editor.

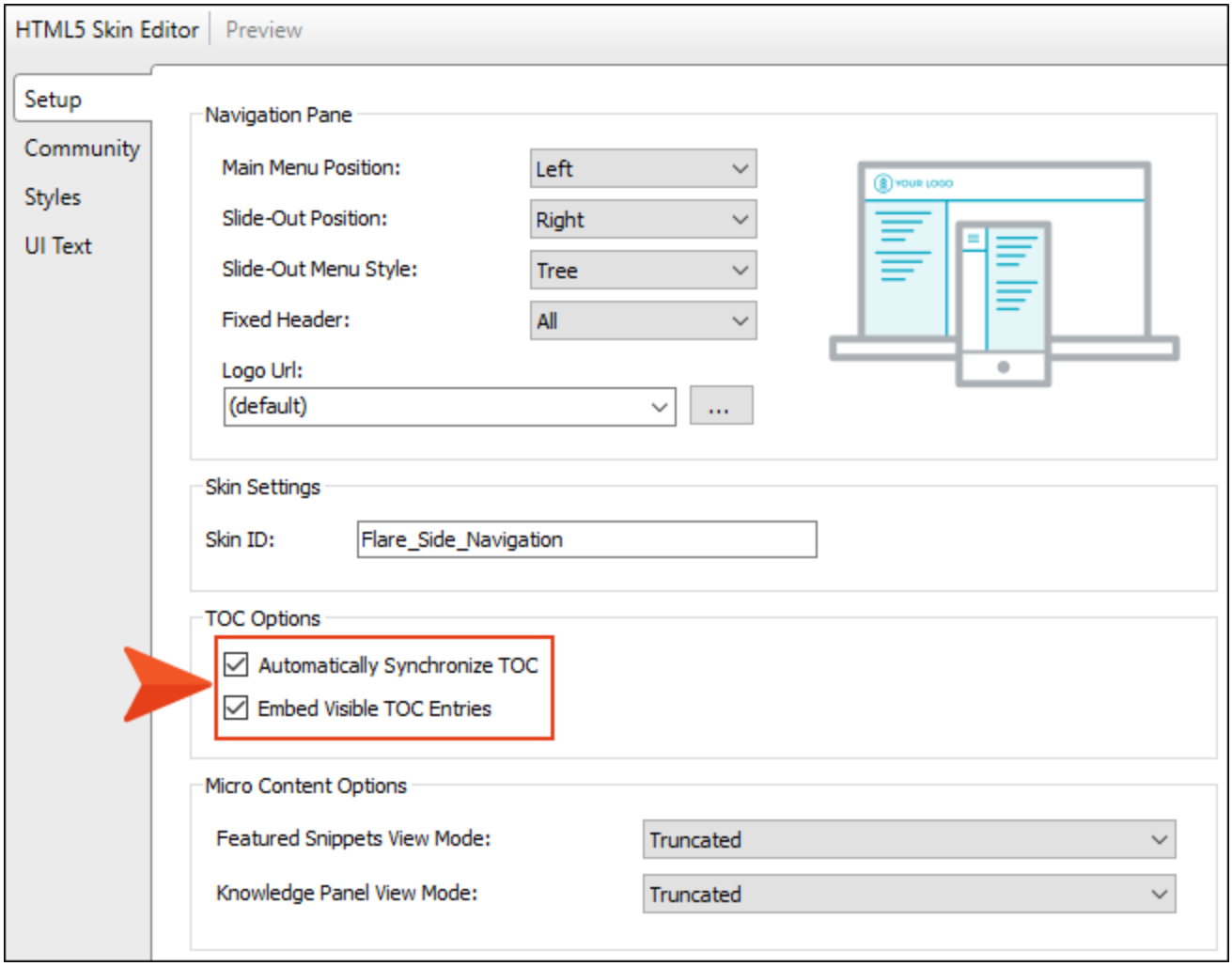


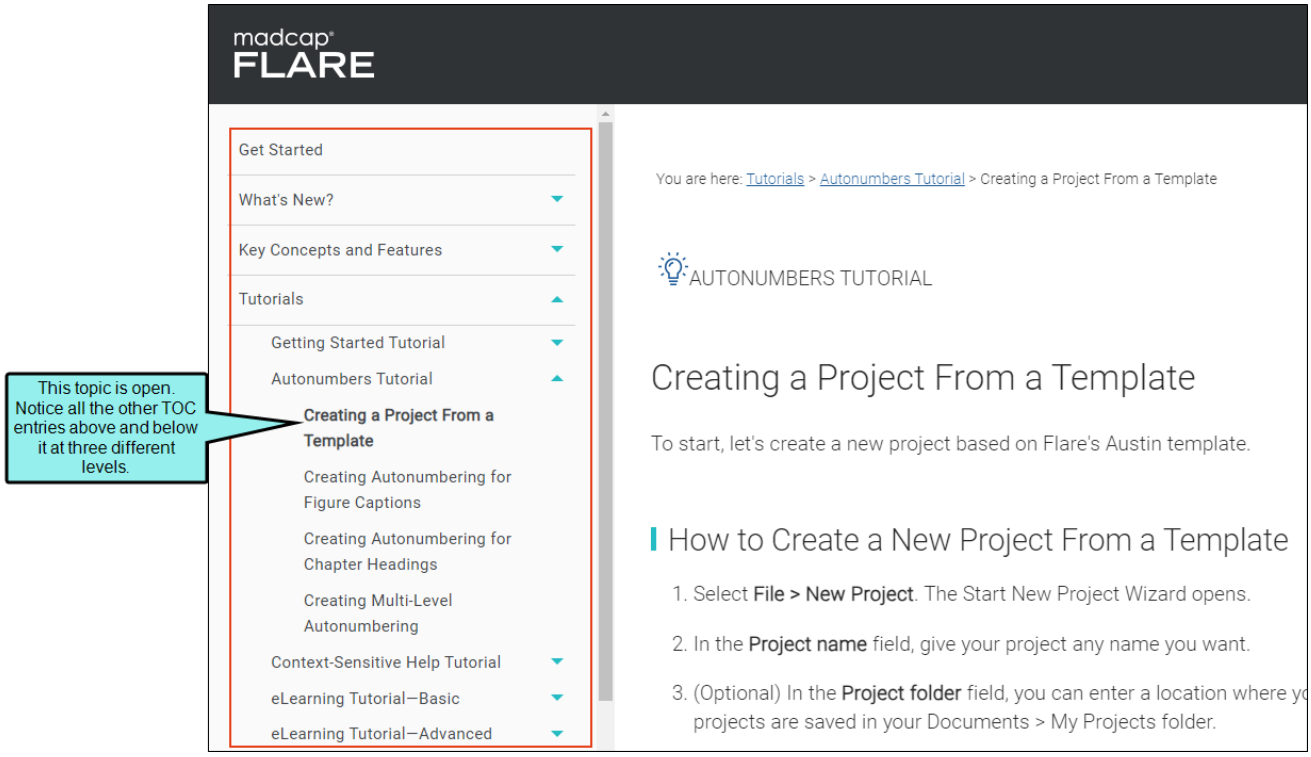
With this option enabled, the TOC automatically changes to highlight the entry that is related to whatever topic is opened. This way, users can always see where the current topic belongs in the TOC, even if they did not access the topic via the TOC.





If both the "Automatically Synchronize TOC" and the "Embed Visible TOC Entries" options are enabled, all visible nodes (parent and children) in the TOC are preloaded in the output. This is different than the situation where only the "Embed Visible TOC Entries" option is enabled, in which case only the parent-level TOC nodes are preloaded.


HTML5 Skin Editor
Preview
Setup
Community
Styles
UI Text
Navigation Pane
Main Menu Position:
Left
Slide-Out Position:
Right
Slide-Out Menu Style:
Tree
Fixed Header:
All
Logo Url:
(default)
...
Skin Settings
Skin ID:
Flare_Side_Navigation
TOC Options
Automatically Synchronize TOC
Embed Visible TOC Entries
Micro Content Options
Featured Snippets View Mode:
Truncated
Knowledge Panel View Mode:
Truncated


madcap FLARE
Get Started
What's New?
Key Concepts and Features
Tutorials
Getting Started Tutorial
Autonumbers Tutorial
Creating a Project From a Template
Creating Autonumbering for Figure Captions
Creating Autonumbering for Chapter Headings
Creating Multi-Level Autonumbering
Context-Sensitive Help Tutorial
eLearning Tutorial—Basic
eLearning Tutorial—Advanced
This topic is open. Notice all the other TOC entries above and below it at three different levels.
You are here: Tutorials > Autonumbers Tutorial > Creating a Project From a Template
AUTONUMBERS TUTORIAL
Creating a Project From a Template
To start, let's create a new project based on Flare's Austin template.
How to Create a New Project From a Template
1. Select File > New Project. The Start New Project Wizard opens.
2. In the Project name field, give your project any name you want.
3. (Optional) In the Project folder field, you can enter a location where yo
projects are saved in your Documents > My Projects folder.

If you view the page source for that topic, you'll notice that all of the visible TOC items (at all three levels) are preloaded.

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<li class="tree-node tree-node preloaded">Get Started

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../../Introduction/Whats-New/Whats-New.htm">What's New?<span class="submenu

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../../Introduction/Features/Key-Features.htm">Key Concepts and Features<spa

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../Tutorials.htm">Tutorials<span class="submenu-toggle-container" role="but
<ul class="'vertical menu accordion-menu'">
<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../Getting-Started-Tutorial/Getting-Started-Tutorial.htm">Getting S

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="Autonumbers-Tutorial.htm">Autonumbers Tutorial<span class="submenu-
<ul class="'vertical menu accordion-menu'">
<li class="tree-node tree-node preloaded tree-node-selected">Creating a Project From a Template

<li class="tree-node tree-node preloaded">Creating Autonumbering for Figure Captions

<li class="tree-node tree-node preloaded">Creating Autonumbering for Chapter Headings

<li class="tree-node tree-node preloaded">Creating Multi-Level Autonumbering

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../CSH-Tutorial/CSH-Tutorial.htm">Context-Sensitive Help Tutorial<s

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../eLearning-Tutorial-Basic/eLearning-Tutorial-Basic.htm">eLearning

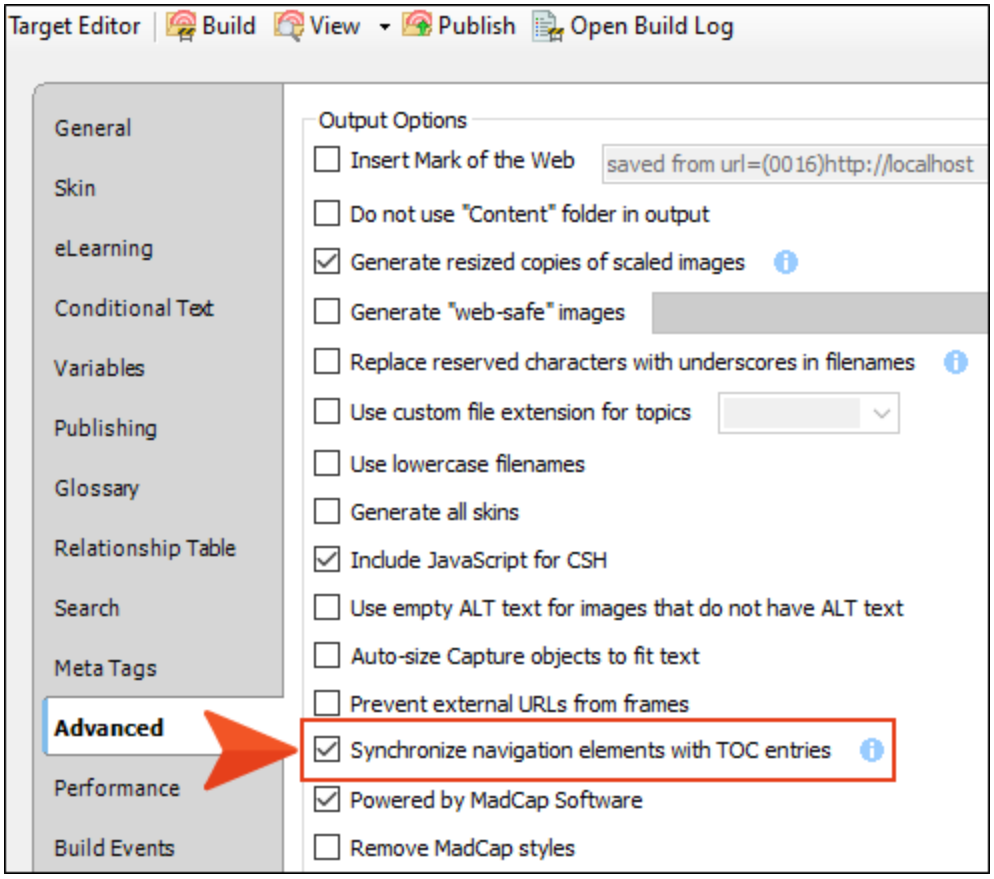
<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../eLearning-Tutorial-Advanced/eLearning-Tutorial-Advanced.htm">eLe

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../Image-Tooltips-Tutorial/Image-Tooltips-Tutorial.htm">Image Toolt

<li class="tree-node tree-node preloaded has-children is-accordion-submenu-parent"><a href="../JavaScript-Tutorials/JavaScript-Tutorials.htm">JavaScript Tutori

Synchronize Navigation Elements With TOC Entries

This option is available on the Advanced tab of the Target Editor.

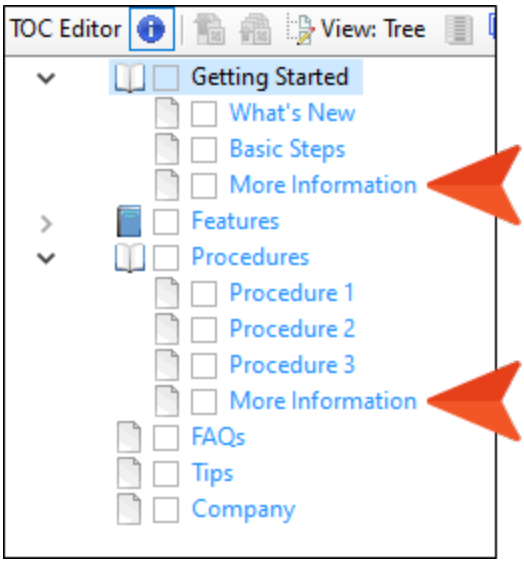


If you generate HTML5 output, links to the TOC (e.g., menu items, breadcrumbs, mini-TOCs) are dynamically generated when a particular topic is opened. This lets you keep these navigation elements in sync with your TOC. This is particularly important if the same topic is linked to multiple entries in your TOC; otherwise, menu items and other navigation elements might display for one instance of that topic in the TOC when another instance is preferred.

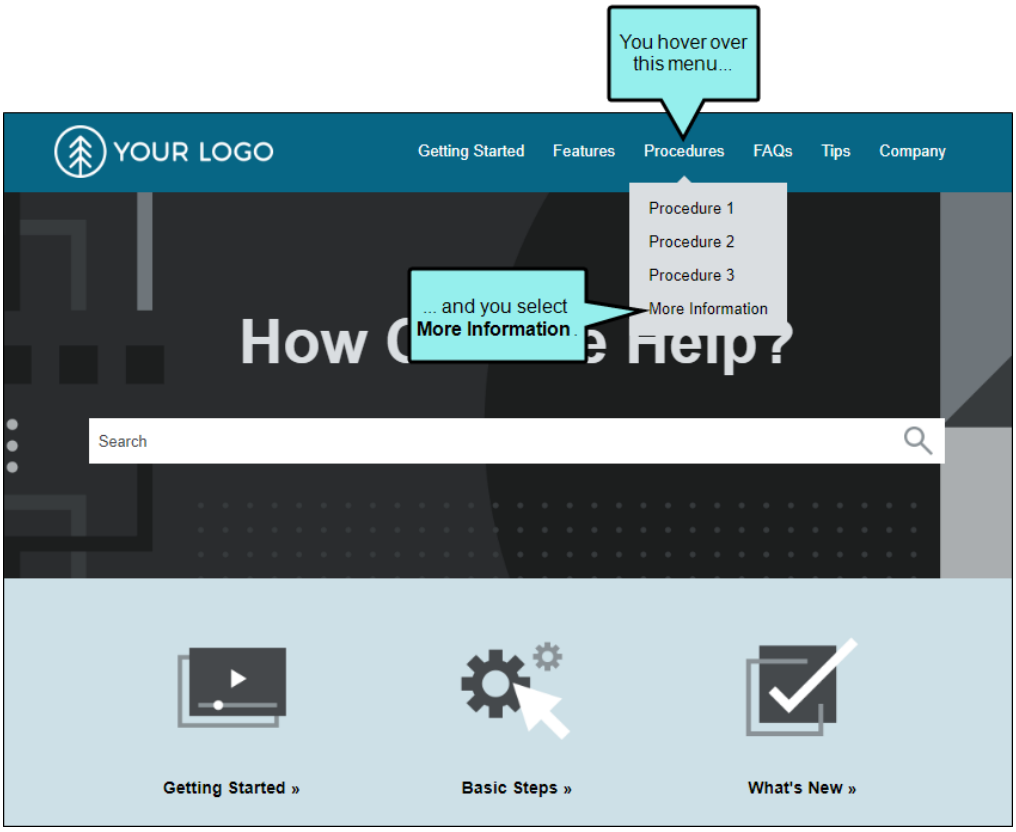
There are a couple of items to note regarding this option:

- *Even when you enable the "Embed Visible TOC Entries" option in the skin, the flicker effect is not reduced when clicking a duplicate TOC entry (other than the first instance). This might be more obvious when you have a Side Navigation configuration.*
- *In previous versions, the last duplicate entry in the TOC would be selected when this option is disabled. Starting with this version, the first duplicate entry is selected when the option is disabled.*

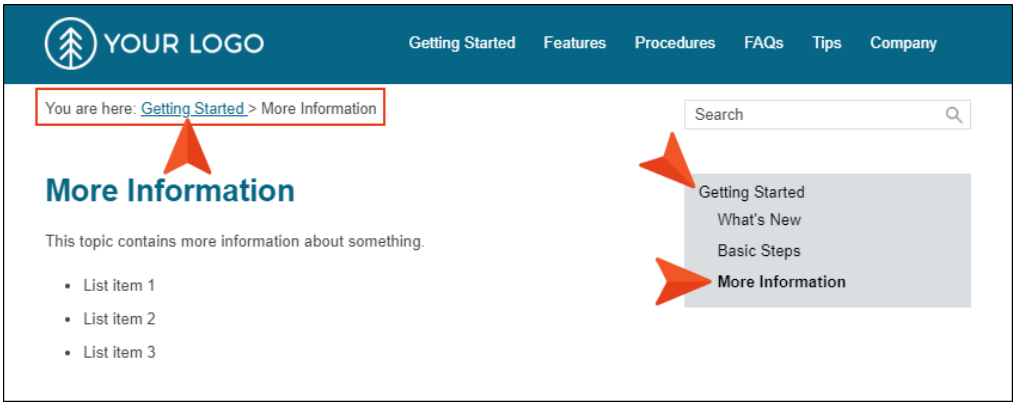
☆ EXAMPLE You have a topic called “More Information” that is linked in two places in your TOC.



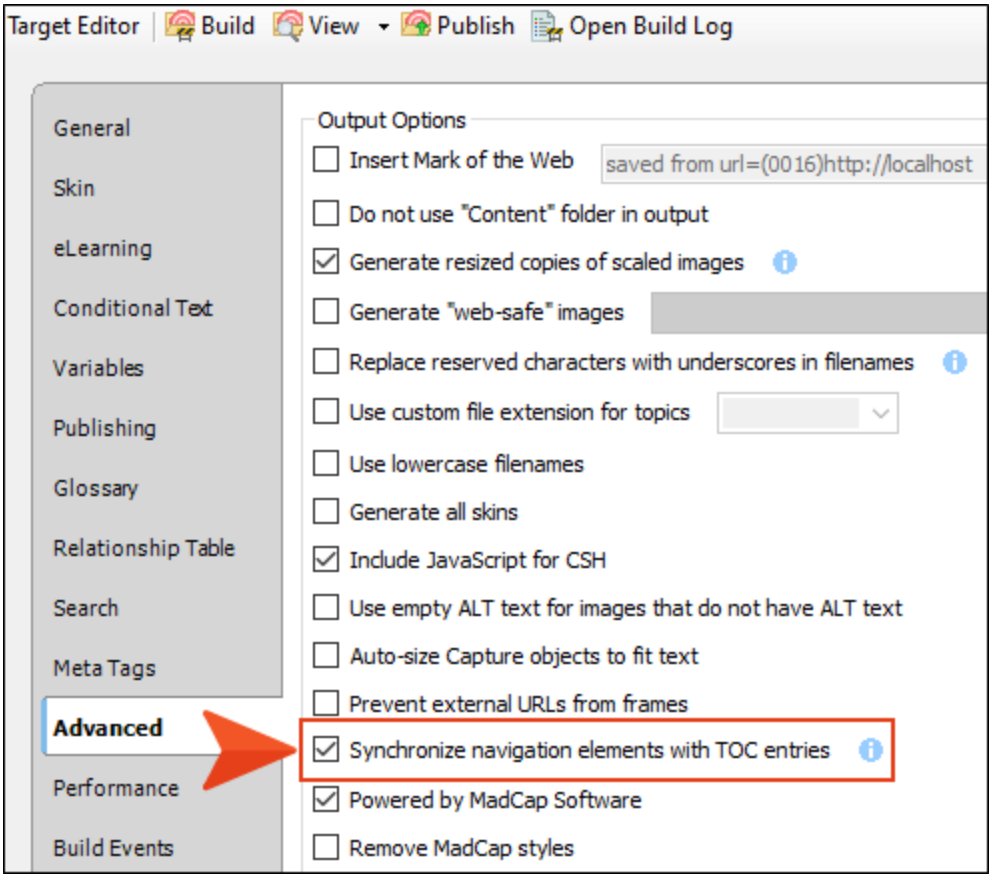
With the synchronization option disabled, you generate HTML5 Top Navigation output. You open the More Information topic under the “Procedures” menu, the second (and last) place that it occurs in the TOC file.



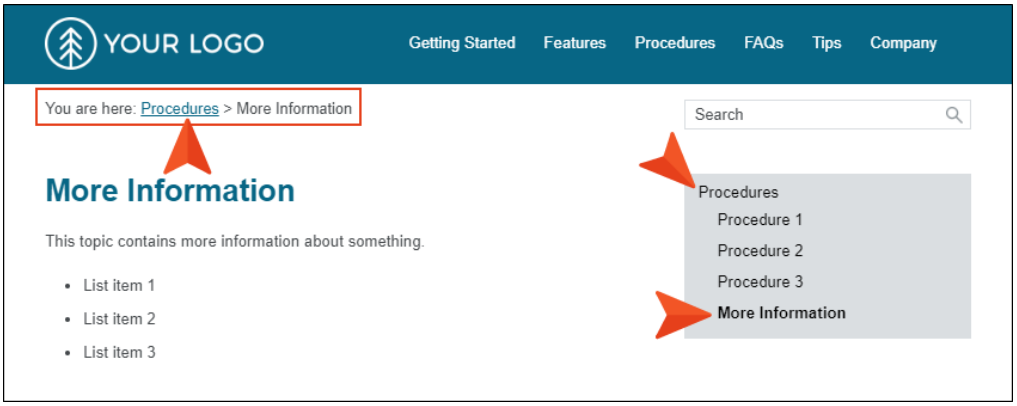
☆ The topic opens, and initially everything seems fine. But if you look at a couple of navigation elements—the breadcrumbs and side menu—you will notice that the topic was opened in the first TOC location (under “Getting Started”). This is the default behavior; the first instance of the topic in the TOC will be shown, not necessarily the one you selected.



☆ Therefore, you open the target and enable the option to synchronize navigation elements with TOC entries.



☆ After generating the target once more, you open the output and select the More Information topic in the same way (in the Procedures menu). When you do this, notice that both the breadcrumbs and side menu are in sync with that location.



CHAPTER 4

Upcoming Deprecated Features

Following are features that will be removed in a future release of MadCap Flare, alongside features that we recommend as replacements.

Deprecated Features	Recommended Replacements
DITA Output	Clean XHTML Output or HTML5 Output
Feedback	Central Analytics
Pulse	Central Analytics
Toolstrip	Ribbons
WebHelp and WebHelp Plus	HTML5 Output

To provide feedback on these deprecated lists, please send an email to: supportplanrep@madcapsoftware.com.

PDFs

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

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

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

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