

**MADCAP FLARE 2024 r2**

# Reviews and Contributions With MadCap Contributor

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MadCap Software  
1660 17th Street, Suite 201  
Denver, Colorado 80202  
858-320-0387  
[www.madcapsoftware.com](http://www.madcapsoftware.com)

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# Introduction

The review process lets you send Flare files for review and receive file contributions from SMEs and other Flare authors. Non-Flare users can download a separate application called MadCap Contributor when collaborating with you and your Flare project. You can also use the same features to send files for review to other Flare authors using Flare only.

The following information has to do with this integration between Contributor and Flare. However, as an alternative, you can use one of the following methods:

- **Central Reviews (Recommended)** Flare supports review packages (i.e., bundling files such as topics and snippets) and lets you send those packages to Central to be reviewed by others. After editing and annotating the files in Central's Review Editor, the reviewers submit the finished files, sending them back to your inbox in Flare. You can then accept or reject their changes and accept the file, replacing the original source file. Because this system uses the cloud, reviewers do not need to download any software to review your files. Also, multiple reviewers can edit the same file at the same time.
- **PDF or Word** You can generate output for the relevant files in PDF or Word format, then send that output to your reviewers. After the reviewers return the document, you can manually incorporate the feedback into the source file(s). If you have tracked changes in Flare, you can preserve the changes so they are visible when you generate PDF or Word output. This is enabled on the Advanced tab of PDF and Word targets. See "Preserving Tracked Changes in PDF or Word Output" on page 67.

# I Contributor Workflows

Following are the main workflows for reviews and contributions:

- "Review Workflow—Sending to Others" on page 8
- "Review Workflow—Receiving From Others" on page 36
- "Contribution Workflow" on page 39

 **IMPORTANT** You cannot use the Internal Text Editor when working with review packages.

# Review Workflow—Sending to Others

You can share review files containing topics and snippets with other individuals to get their feedback. You can transfer the files between yourself and reviewers in various ways (e.g., email, SharePoint, external resources feature, save to a network drive). The reviewer's changes are automatically tracked so you can see what edits were made. After inserting annotations or making changes to a file with Flare or with Contributor (for non-Flare users), reviewers can send the package back to you. You can then view those comments and accept or reject the edits so that they are added to the source file(s). In order to take full advantage of this process, reviewers should have a full, purchased version of either Flare or Contributor.

**This chapter discusses the following:**


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# Workflow

Following is the workflow for sending files out for review using the package process.

1. (Optional) **Author**—Open a topic or snippet that you want to send for review. If you intend to send multiple files for review at once, you do not need to open each one. In the next step, you can use a wizard to add more files.

 **TIP** If you want to ensure that others do not make changes to certain portions of the file, you can apply locks to specific elements within it.

2. (Optional) **Author**—Select **Review > Send for Review**. Choose **Send a review package file**, and complete the rest of the wizard to send the package, or save it to a location.

 **NOTE** If you want to use the integrated email feature, you must have matching versions of Flare and Outlook. If you are using 64-bit Flare, you need 64-bit Outlook. Likewise, if you are using 32-bit Flare, you need 32-bit Outlook.

3. **Reviewer(s)**—Open the review package (FLTREV file) in Contributor or Flare.
4. **Reviewer(s)**—Insert annotations and/or make changes to the file(s) (if full registered mode instead of annotation-only free mode). Changes are automatically tracked.
5. **Reviewer(s)**—Save and return the package to the author. Depending on your workflow, you might need to inform the author that your changes are ready.
6. **Author**—Open the FLTREV package file and take action on it.
  - "Importing Reviewed Files" on page 26 (do this if you saved the review package, rather than using the built-in email feature)
  - "Viewing Reviewed Files in the Inbox" on page 27
  - "Accepting or Rejecting Tracked Changes" on page 60
  - "Accepting Reviewed Files" on page 30

# I Locking Elements

You can lock areas within topics, such as paragraphs, so that they cannot be edited. You might take advantage of this feature, for example, when you are using Flare's file review and contributions process. If you want a reviewer to see portions of a file, but you do not want that individual to alter them, you can lock those parts. After the file is returned, you can unlock those areas of the file. See "Unlocking Elements" on page 12.

When you mark areas in a file to be locked, the background of that area turns gray. However, you can turn this background on or off, depending on whether you want to see it when working on the file.

The diagram illustrates a topic titled "Procedure 2" with a sub-heading "Overview information about this procedure". Below this is a numbered list of five steps. At the bottom of the topic is a "Notes:" section containing two bulleted items. A callout box points to the "Notes:" section and the two bulleted items, which are highlighted with a gray background to indicate they are locked. The callout box contains the following text: "In this example, the 'Notes' heading and bulleted items at the bottom of the topic have been locked, and therefore appear with a gray background. They cannot be edited. The rest of the topic above remains unlocked, which means it can be edited."

**Procedure 2**  
Overview information about this procedure

1. Steps necessary to complete
2. Step.
3. Step.
4. Step.
5. Final step.


**Notes:**

- In the notes section you can list any special information
- Or cautions you may have for the user

In this example, the "Notes" heading and bulleted items at the bottom of the topic have been locked, and therefore appear with a gray background. They cannot be edited. The rest of the topic above remains unlocked, which means it can be edited.


# How to Lock Elements

1. Open the content file.
2. Place your cursor on a paragraph that you want to lock, or highlight multiple paragraphs.

 **NOTE** Only entire blocks of content or paragraphs can be locked, not portions of paragraphs.

3. Select **Review > Lock > Lock**.

The paragraphs display a gray background, which will not show up in the output.


If you want to hide this shading from the XML Editor, but still keep the locks on the paragraphs, select **Review > Lock > Show Locked Elements** (in the ribbon view). You can also click the down arrow next to the **Show tags** button  in the XML Editor. Then select **Show Locked Elements**.

Notice that you can still click in the paragraphs and edit the text. That is because the elements have only been marked for locking, but they have not yet been locked.

4. Select **Review > Lock > Enable Locks**.

The paragraphs marked for locking are now locked, and you cannot edit the text within them.

5. Click  to save your work.

 **NOTE** Annotations, which are used in the file review process, cannot be added to areas of a file that have been locked.

 **NOTE** This feature is to be used for locking areas of a file, not the file itself.


# I Unlocking Elements

After locking elements of a paragraph, you can unlock them when you are ready to edit the text again. See "Locking Elements" on page 10.

## How to Unlock Elements

1. Open the content file.
2. Select **Review > Lock > Enable Locks**.to remove the check mark.

The elements are now unlocked and you can edit them. However, the paragraphs continue to be "marked for locking," meaning they can be easily be locked again by selecting this option again.


3. (Optional) If you want to remove the "marks" on paragraphs that prepare them for locking, place your cursor on the paragraph or highlight multiple paragraphs. Then select the **Review** ribbon. Select **Lock > Lock** to remove the check mark.
4. Click  to save your work.

# Sending Files for Review in Contributor or Flare

Following are steps for sending files to others for review using Flare or Contributor (i.e., the review package process).

## How to Send Files for Review


1. Do one of the following:
  - Open a file (topic or snippet).
  - In the Content Explorer, select a file (topic or snippet).
  - In the File List window pane (**View > File List**), select one or more files (topic or snippet). You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
  - Open a table of contents (TOC) or browse sequence and select one or more entries within it. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

 **NOTE** If you use the TOC option, individuals who receive the review package can view that package as a TOC using the TOC view option in the Review Packages window pane. This allows them to see the context and organization of the material that you send.

2. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon** Select **Review > Send for Review**.
  - **Right-Click** If you have a TOC or browse sequence open, right-click the entry and from the context menu, select **Send for Review**.

The Send Files for Review Wizard opens.

**Send Files for Review Wizard** ? X





**Send Files for Review...** 

Select files to send for review...

Review Package Name:

Review Package Description:



Files:







	Name	Folder	
	Procedures.htm	Content/C-Procedure-Topics/	<input checked="" type="checkbox"/>
	Procedure1.htm	Content/C-Procedure-Topics/	<input type="checkbox"/>
	Procedure2.htm	Content/C-Procedure-Topics/	<input type="checkbox"/>
	Procedure3.htm	Content/C-Procedure-Topics/	<input type="checkbox"/>

All snippets that are part of a topic will initially be included in the review. However, in the Files grid you can remove any snippets to exclude them from the review. Excluded snippets will still be visible (but read-only) in the topic.

TOC:

3. In the **Review Package Name** field, enter a name, and optionally add a description for the package.
4. (Optional) If you want to add more files to the package file, do the following:

- a. Click .
- b. Use the multi-view buttons to find the file(s) you want to add. If you want to add multiple files, make sure  is selected.

Option	Description
	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the Show Folders button  is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	Shows or hides hidden files and folders.
	If the Show Files button  is the only one selected, you can click this button to move up one folder level.

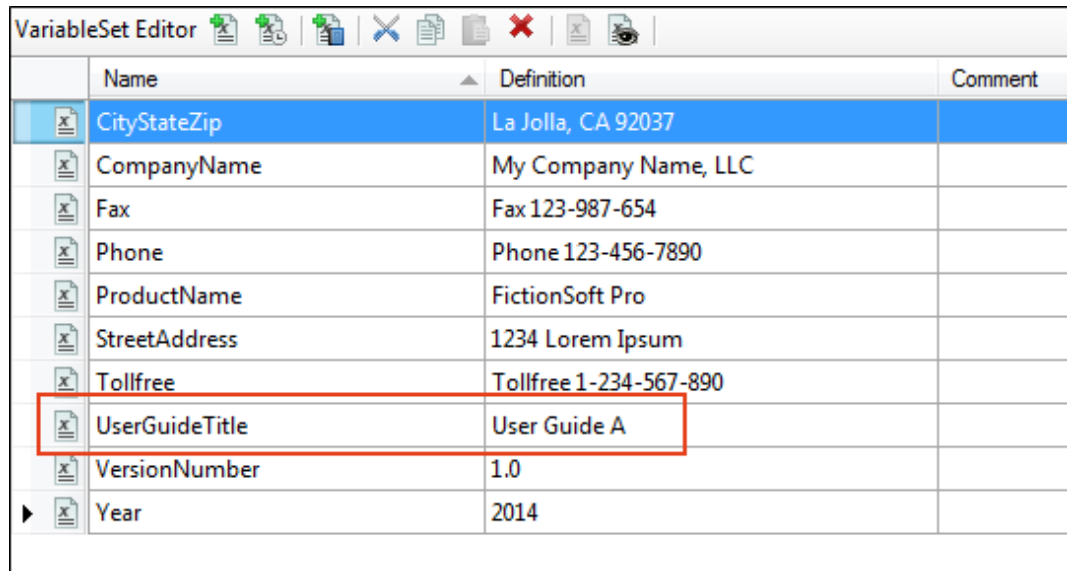
- c. Find and select the file(s) you want to add to the package file. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items. When you are finished click **Open** in the dialog.

If you selected a topic that contains snippets, those snippets are also automatically added to the package.











5. (Optional) The **TOC** drop-down defaults to (none). To associate files within a review package to a TOC in the project, select a TOC.
6. Click **Next**.
7. Select **Send to MadCap Contributor**.

8. (Optional) If you have overridden any default variable definitions for a particular target, and you want the reviewer to see that definition rather than the default one, click in the drop-down field and select it.

☆ **EXAMPLE** You have a variable called "UserGuideTitle," and your default definition for it in the Variable Set Editor is "User Guide A."



The screenshot shows the 'VariableSet Editor' window with a table of variables. The table has three columns: 'Name', 'Definition', and 'Comment'. The 'UserGuideTitle' row is highlighted with a red box.

	Name	Definition	Comment
	CityStateZip	La Jolla, CA 92037	
	CompanyName	My Company Name, LLC	
	Fax	Fax 123-987-654	
	Phone	Phone 123-456-7890	
	ProductName	FictionSoft Pro	
	StreetAddress	1234 Lorem Ipsum	
	Tollfree	Tollfree 1-234-567-890	
	UserGuideTitle	User Guide A	
	VersionNumber	1.0	
	Year	2014	

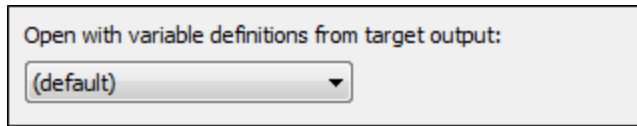


- ☆ However, for some targets, you override that definition in the Target Editor so that it becomes "User Guide B."

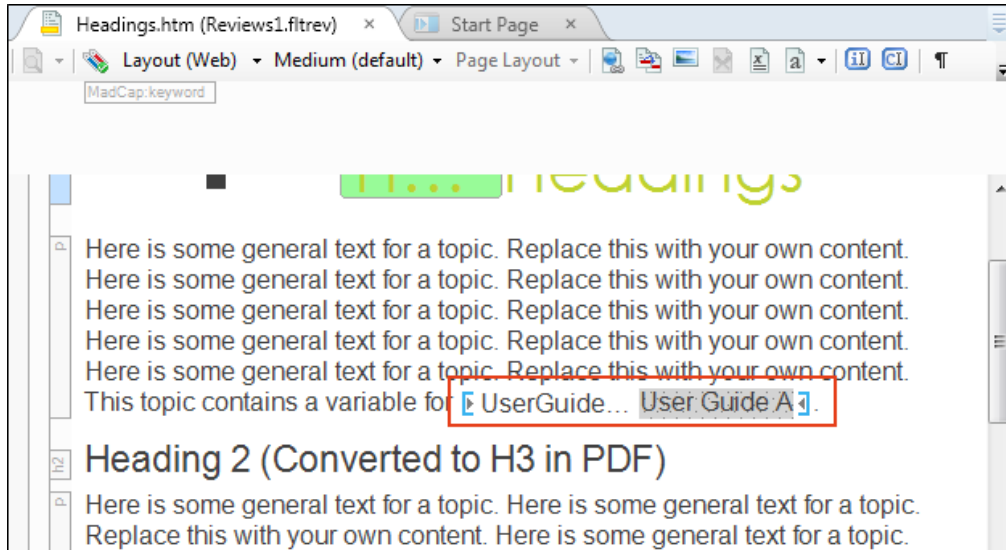
The screenshot shows the Target Editor interface for 'UserGuideB7X9'. The 'Variables' section is active, displaying a table of variables. The 'UserGuideTitle' variable is highlighted with a red box, indicating its definition is 'User Guide B'.

Name	Definition	Comment
CityStateZip	La Jolla, CA 92037	
CompanyName	My Company Name, LLC	
Fax	Fax 123-987-654	
Phone	Phone 123-456-7890	
ProductName	FictionSoft Pro	
StreetAddress	1234 Lorem Ipsum	
Tollfree	Tollfree 1-234-567-890	
UserGuideTitle	User Guide B	
VersionNumber	1.0	
Year	YYYY	

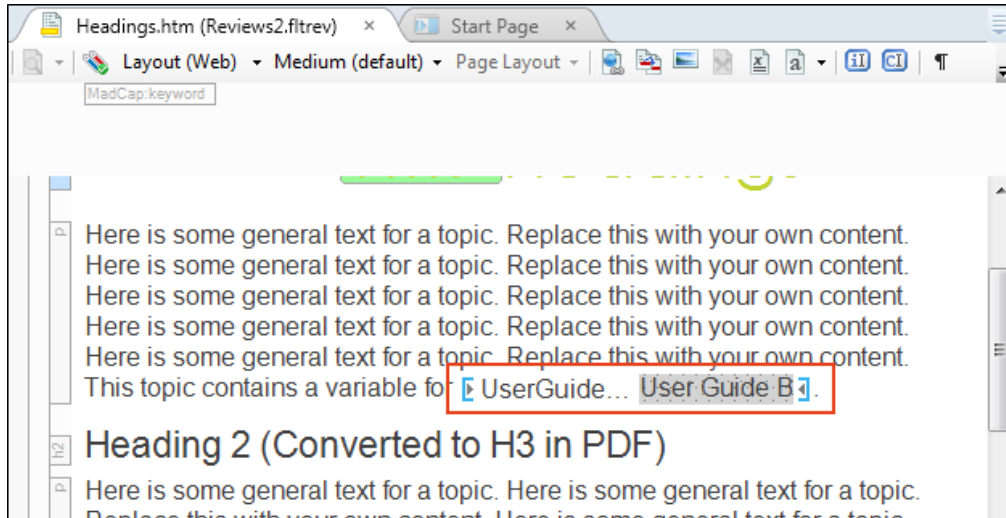
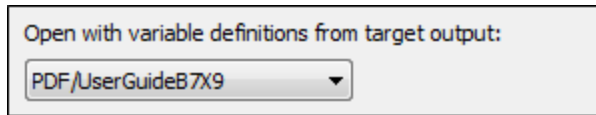
- ☆ Suppose you send a topic for review that has the variable inserted into it, and you keep the default variable selection in the Send Files for Review Wizard.




In that case, the reviewer sees the "User Guide A" variable definition.



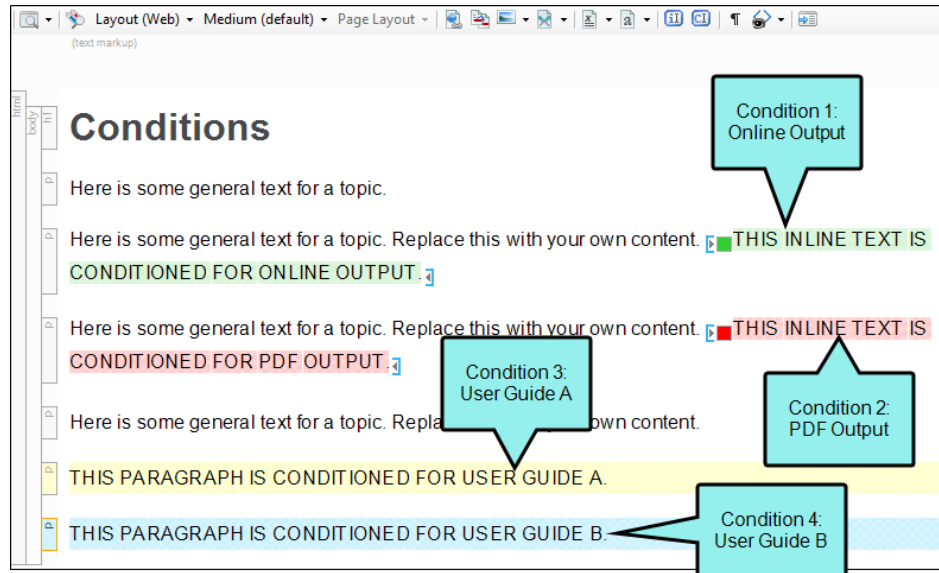
- ☆ On the other hand, in the Send Files for Review Wizard if you select a target that uses the alternate definition, the reviewer sees the "User Guide B" variable definition.



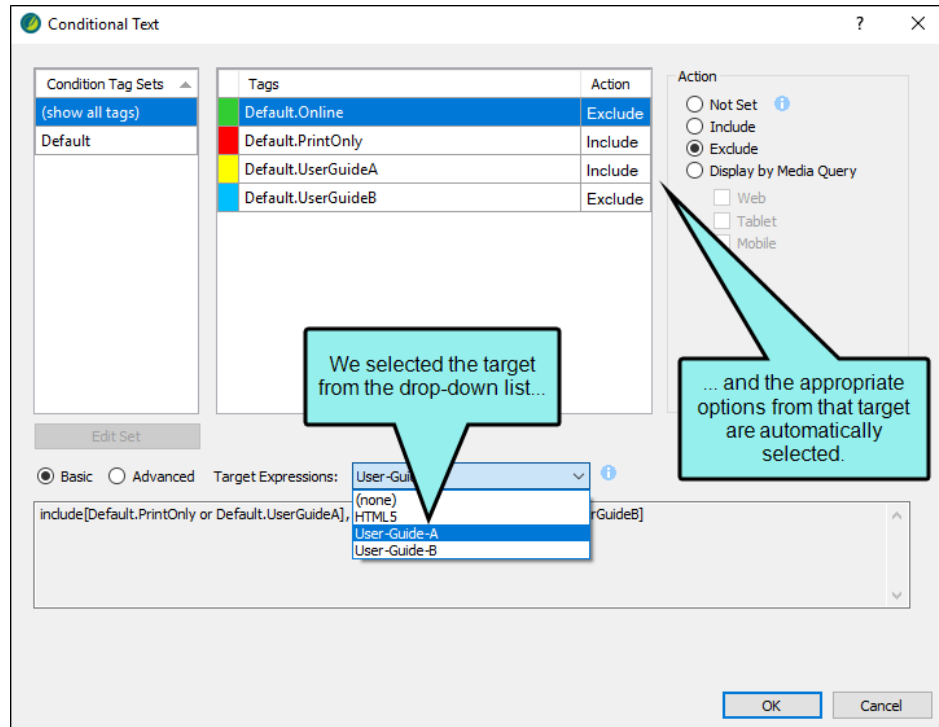
9. (Optional) If you want to include or exclude content in the review files based on condition tags, do the following:
  - a. Click . The Conditional Text dialog opens.
  - b. You can include or exclude conditions in a couple of different ways, or even use both:
    - **Target Settings** The easiest method is to click the **Target Expressions** drop-down and select a target in your project. The dialog is automatically populated based on the included and excluded conditions in that target.
    - **Manual** You can also complete this dialog manually. You can use the same steps that are used in the target for including and excluding certain condition tags.

c. When you are finished, click **OK**.

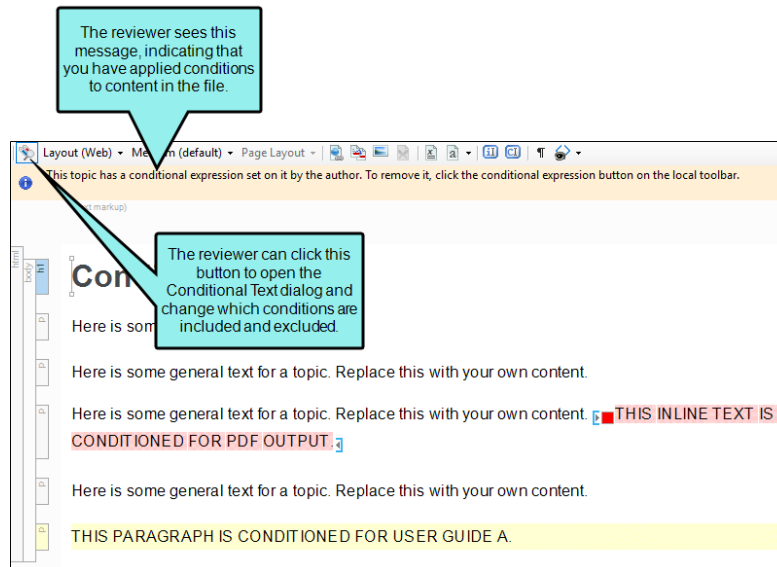
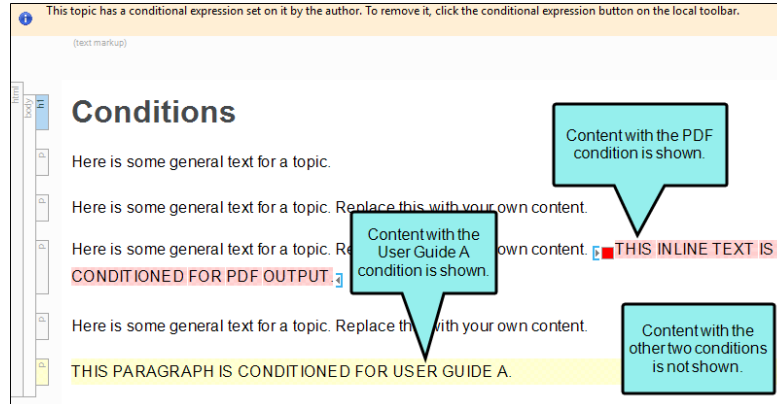
☆ **EXAMPLE** You have a topic that looks like this, with four different conditions applied to content:



- ☆ In the Conditional Text dialog accessed from the Send Files For Review Wizard, you select **Target Expressions** and choose **User-Guide-A**.



☆ When the reviewer opens the file, this is what is shown:





10. (Optional) If you want to save a copy of the review package, click **Save**. Then find and select a folder to store it in and click **Save** again. You might use this option, for example, if you want to place the package in a network, SharePoint, or external resources folder where others can access it, instead of using the built-in email method. If you use this feature, you do not need to complete the rest of the steps. However, you do need to let the reviewer(s) know about the review package, and the reviewers will need to let you know when they are finished making changes to it.
11. (Optional) Click **Next**.

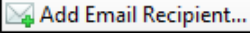
12. (Optional) On the next page of the wizard, you can click in the **Subject** field and edit the default text that will be shown in the Subject field of the email sent to the reviewers.
13. (Optional) Enter or select a message that will be shown in the main body of the email sent to the reviewers.


- You can click in the **Message** area and edit or replace the default text.


OR


- You can select a saved message from the drop-down list above the Message field.

**About the Saved Message Option** The save option is useful if you repeatedly use the same email message text when sending files for review. Instead of retyping the same message each time you go through the wizard, you can click  to type a new message, and then you can save it. After the message is saved, you can select it from the drop-down list above the Message field. If you want to rename an email message, click .

14. (Optional) If you do not have an email address in the list, click . Complete the fields in the New Address Book Entry dialog and click **Add**. Do this for each email recipient.
15. (Optional) Once email addresses have been added to the list, click the **Send** check box next to the addresses that you want to include in the email.
16. (Optional) Click **Send**. A message in Microsoft Outlook opens with the package file attached.
17. (Optional) Send the email.

 **NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Flare and Outlook. If you are using 64-bit Flare, you need 64-bit Outlook. Likewise, if you are using 32-bit Flare, you need 32-bit Outlook.

 **NOTE** If Microsoft Outlook is not installed or an Exchange server cannot be found, you will be prompted to save the review file and send it manually.

 **NOTE** If you send out review packages and then move or rename the project, you will receive an error stating that the package does not belong to the project when you attempt to import those review packages. That's because Flare looks for the path of the project. Therefore, in order for it to function correctly, you need to return the project to the original path and name.



# I Viewing Files Sent for Review

You can view a list of all files that you have sent to others for review. If you double-click a file from the list in the File Reviews window pane, it opens in the XML Editor.

## How to View Files Sent for Review

1. Select **Review > File Reviews**.

The File Reviews window pane opens.

2. From the drop-down at the top of the window pane, select **Sent Files**.

## What's Next?

From the File Reviews window pane, you can select a file in the list and click one of the buttons in the local toolbar to take action on it. The options that you can use depend on whether you are using central reviews or Contributor reviews.

# I Importing Reviewed Files

You can import reviewed files (topics and snippets) into the inbox of the File Reviews window pane. After that, you can view and/or accept the file. You might use this feature, for example, if you have received a file from a reviewer, but rather than immediately sending the file to your inbox from the email message, you saved it to a folder on your computer or a network drive.

## How to Import Reviewed Files

1. Select **Review > Import Review Package**.
2. Navigate to the reviewed package (FLTREV file) and double-click it.
3. In the message that opens, click **Yes** if you want to immediately view the file, or click **No** if you do not want to open it. The file is added to your inbox.



**NOTE** If you send out review packages and then move or rename the project, you will receive an error stating that the package does not belong to the project when you attempt to import those review packages. That's because Flare looks for the path of the project. Therefore, in order for it to function correctly, you need to return the project to the original path and name.

## What's Next?

After you import a reviewed file, you can accept it, making the file part of your project. See "Accepting Reviewed Files" on page 30.

# I Viewing Reviewed Files in the Inbox

After an individual returns files that you have sent for review, you can bring those files into your Flare project. Once a reviewed file is inside your project, you can view and accept it. If you do not see any topics in the window pane, it might be because you did not use the built-in email feature, but rather saved the review package manually. In that case, you need to import the review package.

## How to View Reviewed Files

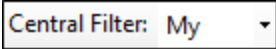





1. Select **Review > File Reviews**.



The File Reviews window pane opens.

2. From the drop-down at the top of the window pane, select **Inbox**. All reviewed files that you have brought into your project, but have not yet been accepted, are listed in the pane.

## What's Next?

From the File Reviews window pane, you can select a file in the list and click any of the following buttons in the local toolbar to take action on it. This window pane can be used for either Central reviews or for Contributor reviews. Some of the options are available for only one process or the other.

Item	Description	View	Process
	Lets you switch from viewing “My” files to “All” files. In other words, you can choose to see only the files that you have added to the review, or you can see all files that you and other Flare authors have selected for review. This filter is applicable only to Central reviews; it is not relevant to Contributor reviews.	Both	Central Reviews
	Refreshes the window pane so that the latest information is shown.	Both	Both
	Deletes the selection.	Both	Both
	Opens a dialog asking if you want to move the files to a closed state. Select yes to close the file. Select no to preview the file as a read only file; edits can still occur until it is accepted.	Both	Both
	Opens the source topic in the XML Editor.	Inbox	Both
	Lets you accept the reviewed file. After accepting the file, it overwrites the source file in your project. Any edits or annotations (i.e., comments) in the reviewed file therefore become part of the original file.	Inbox	Both


Item	Description	View	Process
	<p>Closes the review process for the selected files. This action pertains only to Central reviews, not to Contributor reviews. After a file is closed for review, it means the file can no longer be edited on Central. You can then accept or reject any changes to the file in the editor, then accept the file back into the Flare project.</p>	Both	Central Reviews
	<p>Opens a dialog that lets you import reviewed files into the Inbox of the File Reviews window pane. This option pertains to Contributor reviews, not to Central reviews.</p>	Inbox	Contributor Reviews

# Accepting Reviewed Files

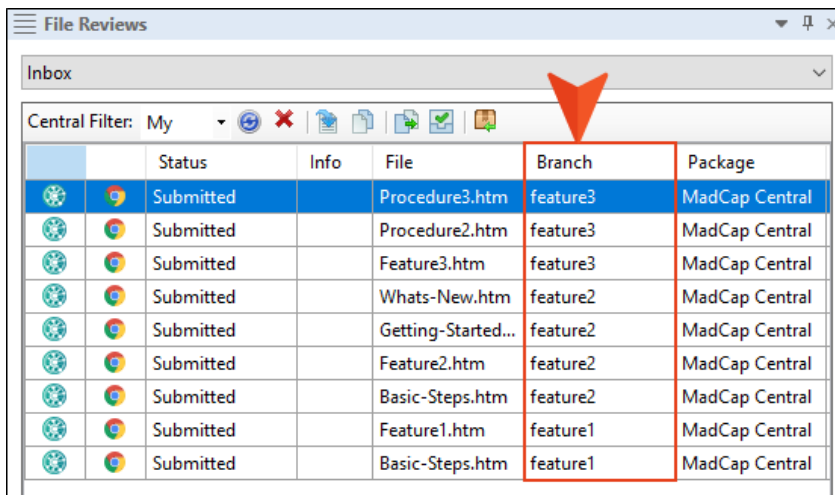
After an individual submits files that you have sent for review, those files populate the File Reviews Inbox of your Flare project. You can close files, and then view and accept the files into the project. Once all the assigned reviewers submit all the files for a review package, and those files are accepted by the owner, the review package closes automatically. After accepting a file, it overwrites the original source file in your project. Any edits or annotations in the reviewed file become part of the source file.



















## How to Accept Reviewed Files

1. Select **Review > File Reviews**. The File Reviews window pane opens.
2. From the drop-down at the top of the window pane, select **Inbox**. It lists all the submitted files from the review package, but the files have not yet been accepted.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When closing the review process for files, dealing with tracked changes, and accepting the file back into the project, you want to be working in the correct branch so that the file changes are not applied in the incorrect branch.

In the File Reviews window pane, you can see which branch a file originates from.




	Status	Info	File	Branch	Package
	 Submitted		Procedure3.htm	feature3	MadCap Central
	 Submitted		Procedure2.htm	feature3	MadCap Central
	 Submitted		Feature3.htm	feature3	MadCap Central
	 Submitted		Whats-New.htm	feature2	MadCap Central
	 Submitted		Getting-Started...	feature2	MadCap Central
	 Submitted		Feature2.htm	feature2	MadCap Central
	 Submitted		Basic-Steps.htm	feature2	MadCap Central
	 Submitted		Feature1.htm	feature1	MadCap Central
	 Submitted		Basic-Steps.htm	feature1	MadCap Central

For Central reviews, a file status should be Closed before it is accepted into the project.

Also, regardless of the process you use (Central or Contributor), make sure you have accepted or rejected the changes as necessary in the files.

3. In the grid, select the file(s) that you want to accept. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

4. In the local toolbar, click .

A message opens (if there are unresolved changes), indicating that the unresolved changes will be accepted if the file is accepted. However, if a conflict exists (e.g., the original file in your project changed since the time you sent it out for review), a dialog opens to let you know of the issue. You can then take the appropriate action; you can merge the changes from the files, keep the edits from the reviewer (undoing your changes), or keep your edits (discarding those from the reviewer).

5. Click **OK**. The reviewed file replaces the source file in the project.

Also, the file is removed from the File Reviews window pane.

# I Merging Reviewed Files

If you attempt to accept a reviewed file and Flare detects a conflict, a dialog opens so that you can take the appropriate action.

☆ **EXAMPLE** You send a file to a reviewer. Before the reviewer returns the file, you make changes to the original file in your project. Then you receive the reviewed file and attempt to accept it so that it becomes part of your project. Flare detects a conflict because the original has changed, so you are given a few options. You can merge the changes from the files, keep the edits from the reviewer (undoing your changes), or keep your edits (discarding those from the reviewer).



# How to Merge Reviewed Files

1. Go through the process of accepting a reviewed file (see "Accepting Reviewed Files" on page 30). If a conflict exists, a dialog opens.
2. In this dialog, you can choose from the following options and click **OK**.
  - **Merge changes in merge tool** Opens a merging interface, which lets you see exactly what changes were made and choose which to keep.
  - **Undo my local changes** Removes your changes and keeps changes from the reviewer.
  - **Discard reviewer changes** Removes changes from the reviewer and keeps your changes.





If you selected the first option, the Merge Changes dialog opens, showing the original (local) file on one side and the reviewed file on the other side, with changes shown in different colors.

3. (Optional) If you want to change the colors associated with the changes, you can click **Options**.
4. (Optional) By default the files are shown in a WYSIWYG (What You See Is What You Get) view. But you can click **Merge as Text** to work in the markup instead; you can left-click to resolve conflicts (accept changes) when merging as text.
5. You can use the Merge Changes dialog to view and select changes. You can take actions in the following ways.
  - **Right-Click Icon** You can right-click on the icon next to a change on either the local or reviewed side. This displays a context menu, which lets you keep or ignore a particular change.
  - **Left-Click Icon** You can left-click on the icon next to a change on either the local or reviewed side. When you do this, the change from one side is kept and the change from the other side is ignored. If you left-click the icon again, the results are toggled; the first change is ignored and the other is kept.
  - **Type Content** If you want to use your changes as well as those from the reviewer, and even tweak the paragraph a bit more, you can click in the area at the bottom of the dialog and simply type content.
  - **Previous/Next Conflict** When you are finished resolving the first conflict, you can use the "Previous Conflict" and "Next Conflict" buttons at the bottom of the dialog to work on other conflicts in the topic.
6. After all conflicts have been resolved, click **OK**.













A backup of the original file is added to the Backups window pane. This lets you restore that file if you do not want to keep the merged version.

## Icons for File Differences

Following are descriptions of the various icons you might see in the Merge Changes dialog when merging files.

Icon	Description
	<b>Changed Content</b> This indicates that the content has changed but there is no conflict. Therefore, no action is needed.
	<b>Changed Tag</b> This is the same as the "Changed Content" icon, except the content has not changed, just a tag, such as a style or span.
	<b>New Content</b> This indicates that there is new content, but there is no conflict with your changes. Therefore, no action is needed.
	<b>Deleted</b> This indicates that content was deleted, but there is no conflict with your changes. Therefore, no action is needed.

Following are descriptions of conflict icons.

Icon	Description
	<b>Changed Content—Conflict</b> This indicates that the content has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.
	<b>Conflict Change—Accepted</b> This indicates that a change with a conflict has been accepted after clicking on  . The bottom pane of the Merge Changes dialog updates to show the accepted content.
	<b>Conflict Change—Not Accepted</b> This indicates that a change with a conflict will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays  , the opposite pane where the conflict exists will display  .
	<b>Changed Tag—Conflict</b> This indicates that the tag has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.
	<b>Conflict Tag—Accepted</b> This indicates that a change with a conflict in a tag has been accepted after clicking on  . The bottom pane of the Merge Changes dialog updates to show the accepted content.
	<b>Conflict Tag—Not Accepted</b> This indicates that a change with a conflict in a tag will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays  , the opposite pane where the conflict exists will display  .

# Review Workflow—Receiving From Others

Using Flare, you can review documents sent to you by others.

### Workflow

1. Open the review package file, and in the dialog that opens, select **Open the package in Flare for review**. Then click **OK**.
2. In the Review Packages window pane, double-click a row to review and edit a particular file.  
If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Snippet File**.
3. Edit the content in Flare. You can also insert annotations (i.e., comments). Your changes are tracked automatically.
4. Return the review package to the author.

This is a typical document sent for review by another Flare author.

The screenshot shows the Flare XML Editor interface. The main window displays a document titled "Welcome.htm" with the following text: "FictionSoft, the very best fictional software ever! (place your product tag line here)". Below this, it says "Most online help systems have a welcome page. The Welcome page provide overview information, links, company or product logos, or any other information that you think will help your users. Typical information includes:" followed by a numbered list starting with "1. All of the topics in the review package are listed in this window pane. You can double-click any row to open a particular topic file." The interface includes a "Project Organizer" and "Content Explorer" on the left, and a "Review Packages" pane at the bottom. The "Review Packages" pane shows a table of files for review.

File	Folder	Author: Abu	g Set
Whats new.htm	Content		
Welcome.htm	Content		
Procedure 2a.ht...	Content/Using		Ready for Review
Procedure 2.htm	Content/Gettin...		Complete


Annotations in the image include:

- "Your changes are tracked automatically so the other author can see what you've done and accept or reject the edits" pointing to the document content.
- "This topic is one of several sent for review in the same package." pointing to the "Welcome.htm" file in the Review Packages pane.
- "You can also insert annotations." pointing to a blue box containing "Annotation [PS] Add step 5".
- "When you are finished reviewing all topics in the package, click this button to return the package to the author." pointing to the "Return to Sender..." button in the Review Packages pane.

**NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Flare and Outlook. If you are using 64-bit Flare, you need 64-bit Outlook. Likewise, if you are using 32-bit Flare, you need 32-bit Outlook.

# I How to Return Documents to Authors

The following steps include the integrated Outlook email method. If your systems are not set up for this feature, you can use one another method (e.g., SharePoint, or save to your computer and manually email).

1. Open the review package containing the documents you reviewed. If you do not see the Review Packages window pane, select **Review > Review Packages**.
2. In the local toolbar of the Review Packages window pane, click . The button is a rectangular box with a green arrow pointing left and the text "Return to Sender...".
3. In the email message, click **Send**.

## CHAPTER 4

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# Contribution Workflow

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

This chapter discusses the following:

Workflow .....	40
Creating and Sending Contribution Templates .....	41
Sending Contribution Templates .....	44
Viewing Contribution Templates .....	46
Importing Contribution Files .....	47
Viewing Contribution Files .....	48
Accepting Contribution Files .....	50

# I Workflow

1. (Optional) **Author**—Create and send a contribution template to the contributor.

✔ **TIP** If you want to ensure that the contributor does not make changes to certain portions of the file, you can apply locks to specific elements within it.


2. (Optional) **Contributor**—Save the template.
3. **Contributor**—Create a new document (MCCO file) in Contributor (with or without using the author's template).
4. **Contributor**—Send the completed file to the author (via email, or by using SharePoint integration or the external resources feature).
5. **Author**—Open the contribution file. A message indicates that the file is added to the Documents\My Incoming Contributions folder. You can then access the file from the Contributions window pane in your project.
6. **Author**—From the Contributions window pane you can view and accept the topic.



# I Creating and Sending Contribution Templates

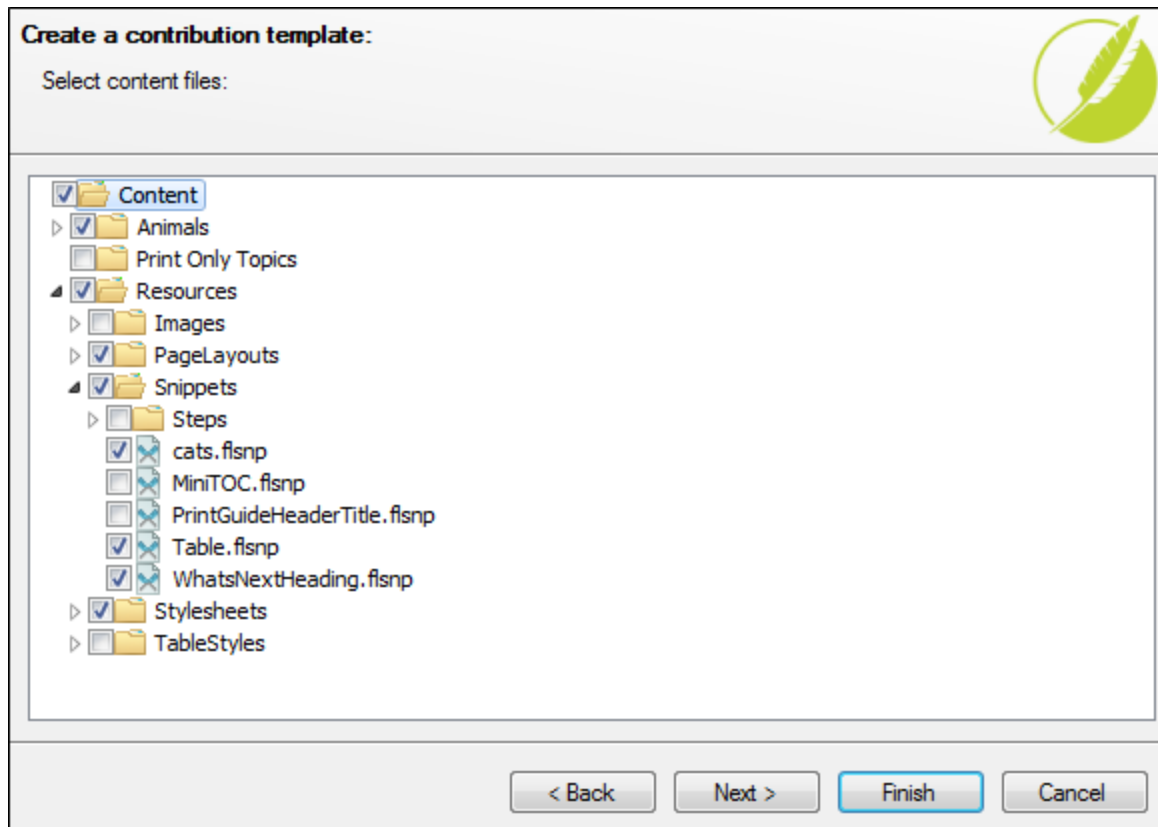
Following are steps for creating and sending a contribution template.

## How to Create and Send Contribution Templates

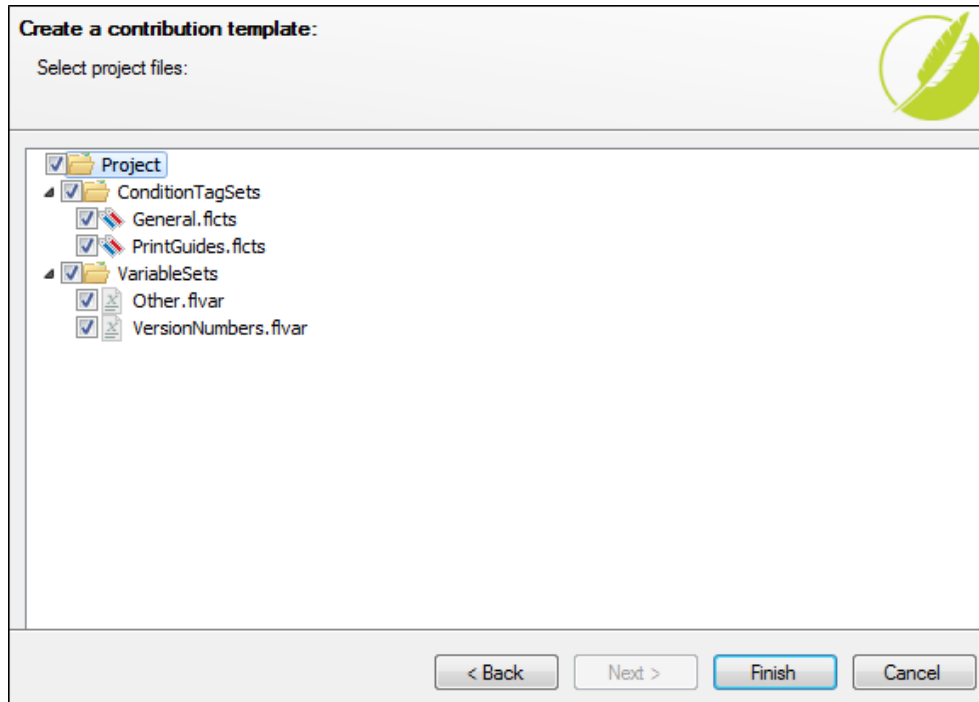
1. Create a topic or open an existing one, and add any content that you want to be part of the ready-made template for contributors (e.g., text, images).
2. (Optional) If there are parts of the topic that you do not want contributors to modify, apply locks to those areas. See "Locking Elements" on page 10.
3. Select **File > Save > Save As Contribution Template**.
4. In the **Template Name** field, enter a name for the new template.
5. (Optional) Click  and select a location to store a copy of the new template file, which uses an .mccot extension.

The default location is Documents/My Contribution Templates. This is the location used if you do not select one.


6. Click **Next**. All of the content support folders and files are shown, and those that are relevant to the topic are already selected. For example, if the topic has an image and a table using a special table stylesheet, those files are selected in the wizard so that they can be included in the template package. If those support files were not included, the contributor would not be able to see the topic in the same way that you are able to. You can also click other check boxes to include additional files if you like. However, you cannot add other topic files.



7. Click **Next**. This is just like the previous page, except it shows project folders and files, with relevant ones already selected. You can click other check boxes to include additional files if you like.



8. Click **Finish**. The Template Created dialog opens.
9. If you want to immediately send the new template to a contributor, click **Yes**. A new email message is automatically created with the template file attached.
10. Send the email.

 **NOTE** You can also email contribution templates that you have already created. See "Sending Contribution Templates" on the next page.


## What's Next?

After contributors make changes to the file and return it, you can double-click on the MCCO file that they send, bring it into your project, and accept it, thus making it part of your project. See "Viewing Contribution Files" on page 48 and "Accepting Contribution Files" on page 50.

# I Sending 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.

Use the following steps to send a contribution template that you have already created. If you have not yet created the template, see "Creating and Sending Contribution Templates" on page 41.


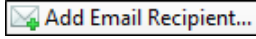
 **NOTE** There is more than one way to transfer files between individuals using Flare and Contributor. For example, you can: (1) use the integrated email feature with Microsoft Outlook, (2) add files to SharePoint or External Resources where others can access them, or (3) save files to your computer (**File > Save**, then **Save As** or **Save To**) and then manually transfer them using some method (e.g., email). If you want to use the integrated email feature, you must have matching versions of Flare and Outlook. If you are using 64-bit Flare, you need 64-bit Outlook. Likewise, if you are using 32-bit Flare, you need 32-bit Outlook.

# How to Send Contribution Templates

The following steps include the integrated Outlook email method. If your systems are not set up for this feature, you can use one another method (e.g., SharePoint, or save to your computer and manually email).

1. Select **View > Contributions**.

The Contributions window pane opens.

2. Click in the drop-down field at the top of the window pane, select **Templates**. All contribution templates that you have created are listed in the pane.
3. Click on the template that you want to send.
4. In the local toolbar click . The Send Contribution Template dialog opens.
5. (Optional) You can click in the **Message** area and edit the default text that will be shown in the main body of the email sent to the contributors.
6. If you do not have an email address in the list, click . Complete the fields in the New Address Book Entry dialog and click **Add**.
7. Once an email address is added to the list, click the **Send** check box next to the addresses that you want to include in the email.
8. Click **Send**.
9. Send the email.

## What's Next?

After contributors make changes to the file and return it, you can double-click on the MCCO file that they send, bring it into your project, and accept it, thus making it part of your project. See "Viewing Contribution Files" on page 48 and "Accepting Contribution Files" on page 50.

# Viewing Contribution Templates

You can quickly see a list of all contribution templates that you have created. From the list, you can open any of the templates or send them to contributors so that they can use them when creating documents in Contributor.

## How to View Contribution Templates




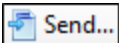
1. Select **View > Contributions**.

The Contributions window pane opens.

2. Click in the drop-down field at the top of the window pane, select **Templates**. All contribution templates that you have created and saved in the Contribution Templates folder are listed in the pane. See "Creating and Sending Contribution Templates" on page 41.

## What's Next?


From the Contributions window pane, you can select a template in the list and click any of the following buttons in the local toolbar to take action on it

Option	Description
	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens the contribution template (MCCOT file) in the Topic Template Editor.
	Opens the Send Contribution Template dialog, which lets you send the template to your contributors. See "Sending Contribution Templates" on page 44.

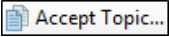
# I Importing Contribution Files

Normally, an individual will email you an MCCO contribution topic. You can then open the file directly in the email message, bringing it into your Flare project, where you can view and accept it. Another option is to import a contribution file. You might use this option if an individual has simply placed the file somewhere on your network, instead of emailing it to you. Of you might use it if you simply saved a contribution file to your local drive instead of immediately bringing it into your project.

## How to Import Contribution Files

1. Select **View > Contributions**. Then in the local toolbar of the Contributions window pane, click . The Import Contribution File dialog opens.
2. Navigate to the MCCO file and double-click it. The file opens in the interface in the Incoming Topic Editor.

## What's Next?

From the Incoming Topic Editor, you can make the imported file a part of your project by clicking  in the local toolbar. After you complete this step, the file is added to your Content Explorer. See "Accepting Contribution Files" on page 50.

# Viewing Contribution Files

After an individual emails you an MCCO contribution topic (or places it in a SharePoint or external resources folder), you can bring it into your Flare project (see "Importing Contribution Files" on the previous page), where you can view and accept it. After accepting the topic, it is converted to an HTM file (XML-based, just like your regular topics) and added to your project.

## How to View Contribution Files





1. Select **View > Contributions**.

The Contributions window pane opens.

2. Click in the drop-down field at the top of the window pane, select **Contributions**. All contributed topics that you have brought into your project, but have not yet been accepted, are listed in the pane.

## What's Next?

From the Contributions window pane, you can select a document in the list and click any of the following buttons in the local toolbar to take action on it.

Option	Description
	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens the contribution topic (MCCO file) in the Incoming Topic Editor.
	Imports a contribution template.



Option	Description
--------	-------------

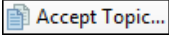


Lets you accept the contribution topic. See "Accepting Contribution Files" on the next page.

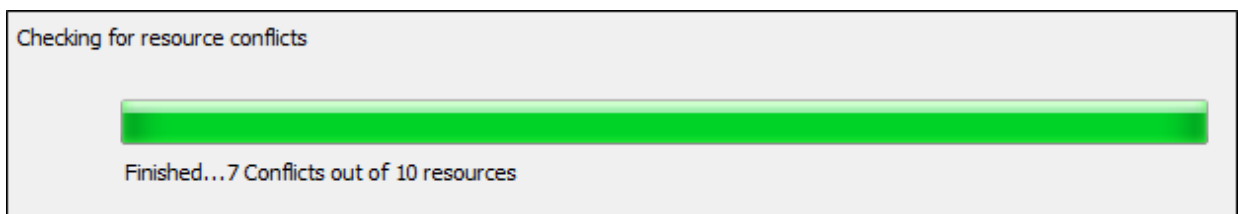
# I Accepting Contribution Files

After an individual emails you an MCCO contribution topic (or places it in a SharePoint or external resources folder), you can bring it into your Flare project (see "Importing Contribution Files" on page 47), where you can view and accept it. After accepting the topic, it is converted to an HTM file (XML-based, just like your regular topics) and added to your project.

## How to Accept Contribution Files

1. Select **View > Contributions**. The Contributions window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Contributions**. All contributed topics that you have brought into your project, but have not yet been accepted, are listed in the pane.
3. In the list, select the topic that you want to accept.
4. In the local toolbar, click . The Accept Contribution Wizard opens.
5. (Optional) In the **File Name** field, you can use the name that the contributor provided, or you can rename it.
6. In the **Select Folder** section, find and select a folder in the Content Explorer where you want to place the new topic.
7. Click **Next**.

Flare checks for conflicts between the contribution resource files and the project's resource files (e.g., images, videos, stylesheets). If conflicts are found, a message indicates the number.



8. Click **Next**.

9. If conflicts were found, the next page lists them in a grid. By default, check marks appear in the Project column for all files. If you leave the check marks in this column, the files that are already in the project will be used while the contribution files will be ignored.

**Accept Contribution**  
Resolve conflicts...

Choose a version to keep. If you select Project, the contribution version is not imported. If you select Contribution, it overwrites the project version. You can keep both if you rename the contribution file or change its path.

Name	Project Path	Project <input checked="" type="checkbox"/>	Contribution <input type="checkbox"/>	Rename Contribution	Contribution Path
Image2.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image3.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image4.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image5.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
QuotationMark.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

In this example, conflicts have been found in five files.

Initially, check marks appear in the Project column for all of the files.

You can accomplish the following on this page of the wizard:

## SORT COLUMNS

You can sort the columns by clicking on the heading. Also, you can readjust the width of a column to display all of its content by double-clicking the header.

## SELECT PROJECT OR CONTRIBUTION FILE IN GRID

For any contribution files that you prefer to keep over the existing project file, you can click the appropriate check box in the **Contribution** column. The contribution file will then overwrite the project file.

**Accept Contribution**  
Resolve conflicts...

Choose a version to keep. If you select Project, the contribution version is not imported. If you select Contribution, it overwrites the project version. You can keep both if you rename the contribution file or change its path.

Name	Project Path	Project <input type="checkbox"/>	Contribution <input type="checkbox"/>	Rename Contribution	Contribution Path
Image2.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image2	/Resources/Images/
Image3.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image4.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image4	/Resources/Images/
Image5.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image5	/Resources/Images/
QuotationMark.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

In this example, we've chosen to use three of the contribution files, overwriting their counterparts in the project.


If you want to use all of the files in the Project or Contribution column, you can click the check box in the appropriate column heading.

**Accept Contribution**  
Resolve conflicts...

Choose a version to keep. If you select Project, the contribution version is not imported. If you select Contribution, it overwrites the project version. You can keep both if you rename the contribution file or change its path.

Name	Project Path	Project <input type="checkbox"/>	Contribution <input checked="" type="checkbox"/>	Rename Contribution	Contribution Path
Image2.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image2	/Resources/Images/
Image3.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image3	/Resources/Images/
Image4.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image4	/Resources/Images/
Image5.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Image5	/Resources/Images/
QuotationMark.png	/Resources/Images/	<input type="checkbox"/>	<input checked="" type="checkbox"/>	QuotationMark	/Resources/Images/

## COMPARE PROJECT AND CONTRIBUTION FILES

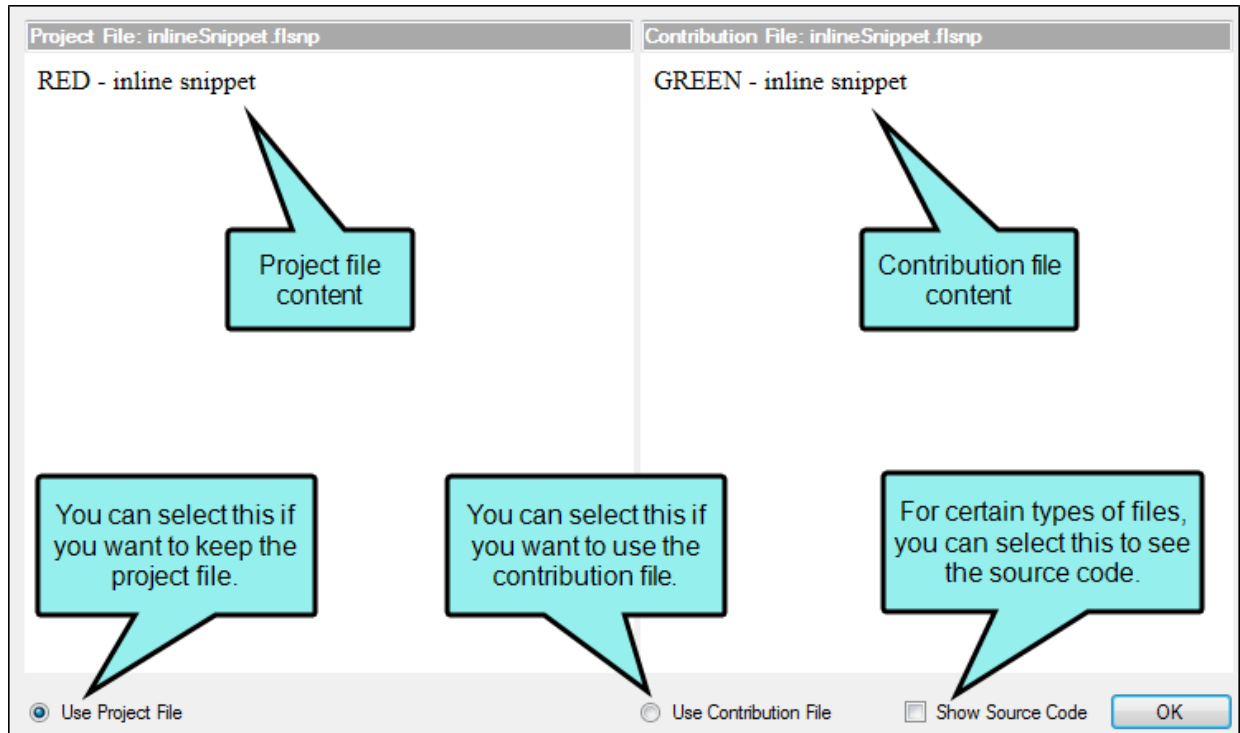
If you're not sure which file you want to use, you can compare the project and contribution files. To do this, either double-click the row in the grid or select the row and click .

**Accept Contribution**  
Resolve conflicts...

Choose a version to keep. If you select Project, the contribution version is not imported. If you select Contribution, it overwrites the project version. You can keep both if you rename the contribution file or change its path.

Name	Project Path	Project <input checked="" type="checkbox"/>	Contribution <input type="checkbox"/>	Rename Contribution	Contribution Path
Image2.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image3.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image4.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Image5.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
QuotationMark.png	/Resources/Images/	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

When you do this, a comparison dialog opens, showing the existing project file on the left and the new contribution file on the right. Within this dialog, you can select options to choose which file to keep. You can also select an option to view the source code.

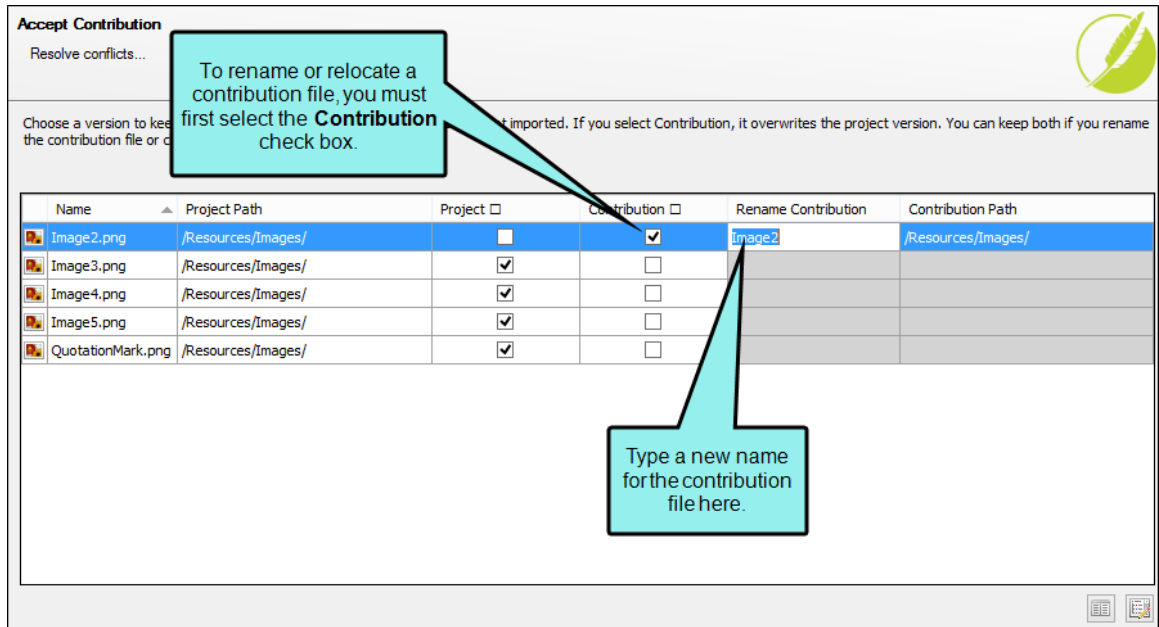


## RENAME AND RELOCATE CONTRIBUTION FILES

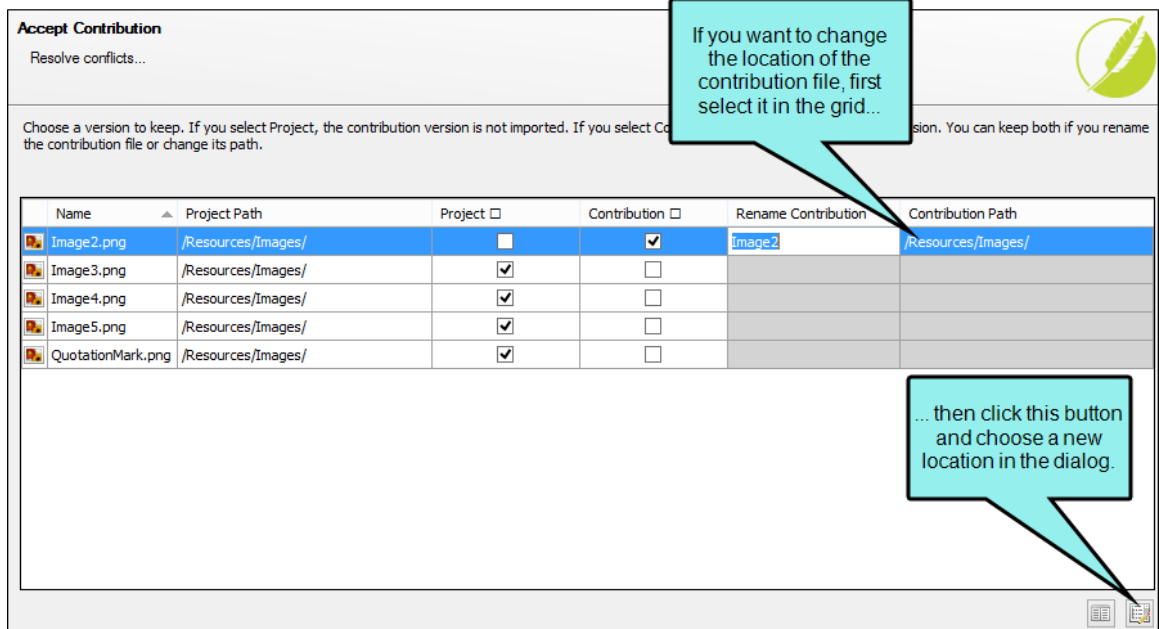
You can accept a contribution file but give it a new name and/or location. This brings the contribution file into your project but does not overwrite the project file that it conflicts with.

### HOW TO RENAME OR RELOCATE A CONTRIBUTION FILE


- In the grid, select the check box in the **Contribution** column for the file you want to rename. The final two columns in the grid become populated.
- If you want to give the file a new name, click in the **Rename Contribution** cell and type a new name.



- c. If you want to change the location of the contribution file so that it does not conflict with the project file, click . Then in the dialog that opens, select a new location in the project and click **OK**.



10. When you are finished dealing with any conflicts, click **Next**.

11. (Optional) The resource files associated with the contribution file are listed. If you want to change the name or location of a particular resource file, select it in the list. Then change the text in the **File Name** field and/or click  to select a new path in the project. It is recommended that you leave the default path.
12. (Optional) If you want to see a preview of the imported file, click **Next**.
13. Click **Finish**.
14. Click **OK**.
15. You will be asked if you want to recycle the contribution file. Click **Yes** if you do not want to keep a copy of the contribution document; the file will be deleted from your project. Click **No** if you want to keep a copy of that document.

# Track Changes

By selecting **Review > Track Changes**, you can see edits made to content files in the XML Editor (topics, snippets, template pages) and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar.

The sidebar indicates what has changed and who did it, by displaying each user's initials.

The screenshot shows a document editor with tracked changes. The main text area contains the following content:

This ~~topic~~ is a ~~very~~ good place to explain the high level concepts that allow a user to be successful with FictionSoft. ~~You might include~~ the following:

- Overall work-flow for FictionSoft
- Important concepts necessary to be successful
- ~~Links to video tutorials~~
- Special language or jargon ~~that a user~~ need to understand

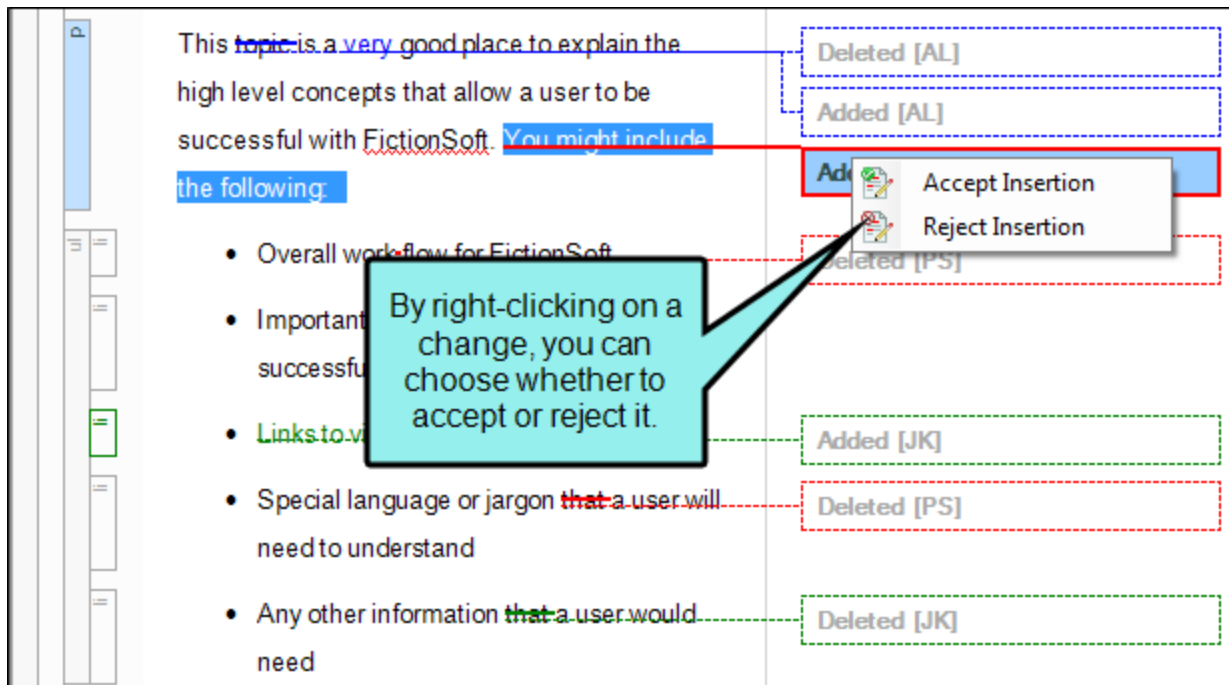
The sidebar on the right shows the following changes:

- Deleted [AL] (blue dashed box)
- Added [AL] (blue dashed box)
- Added [PS] (red solid box)
- Deleted [PS] (red dashed box)
- Added [JK] (green dashed box)

Callouts explain the changes:

- A blue callout points to the sidebar entries for user [AL], stating: "The sidebar indicates what has changed and who did it, by displaying each user's initials."
- A red callout points to the "Added [PS]" entry, stating: "In this example there are changes in three colors (blue, red, and green), which means three different users have made changes."
- A green callout points to the "Added [JK]" entry, also stating: "In this example there are changes in three colors (blue, red, and green), which means three different users have made changes."





By default, tracked changes are visible only in the editor in MadCap Flare, as well as in Central or Contributor (depending on the review method you are using). Tracked changes that have not yet been accepted are not visible when previewing the topic in Flare or when viewing any output generated from it. You can preserve tracked changes in PDF and Word output so unaccepted changes will appear in these outputs.

When this feature is enabled, every change to the document—along with the user who performed the change—will be stored in the document’s markup. For example, deleted text won’t actually be removed from the document, but will instead be marked as deleted in the code. However, if the change is accepted, the text will be removed from the document.

This chapter discusses the following:


Review Workflows .....	58
Enabling Track Changes .....	59
Accepting or Rejecting Tracked Changes .....	60
Changing the Display of Tracked Changes .....	62
Preserving Tracked Changes in PDF or Word Output .....	67
Viewing Files With Changes .....	77


# I Review Workflows

The track changes feature is especially useful as part of the file review processes (when you send topics and snippets out for review to individuals who make changes to them).

- **Central Reviews (Recommended)** Flare supports review packages (i.e., bundling files such as topics and snippets) and lets you send those packages to Central to be reviewed by others. After editing and annotating the files in Central's Review Editor, the reviewers submit the finished files, sending them back to your inbox in Flare. You can then accept or reject their changes and accept the file, replacing the original source file. Because this system uses the cloud, reviewers do not need to download any software to review your files. Also, multiple reviewers can edit the same file at the same time.
- **Contributor Reviews** The review process lets you send Flare files for review and receive file contributions from SMEs and other Flare authors. Non-Flare users can download a separate application called MadCap Contributor when collaborating with you and your Flare project. You can also use the same features to send files for review to other Flare authors using Flare only.

When reviewers open files in Central or Contributor to review them, the track changes feature is automatically enabled. Therefore, you can see exactly what the reviewer modified in the returned document. You can then pick and choose which edits to accept or reject.

 **NOTE** The track changes feature is intended only for self-contained operations within the XML Editor. For example, if you make changes to index keywords or concepts in the Index and Concept window panes (e.g., renaming, assigning them to topics), those modifications are not indicated as tracked changes because they are considered project-wide "link updating" processes.

 **NOTE** The track changes setting is global in a project. For example, let's say you have two topics open. With focus on topic A, you enable the track changes feature. If you bring focus to topic B, the track changes option is now also enabled for that topic. If you then open other topics after that point, the track changes feature will be enabled in those topics as well.

# I Enabling Track Changes

If you want Flare to track your own edits as you make them, you must first enable the feature. When this feature is set, Track Changes is enabled globally throughout your Flare project. When reviewers open topics in Central or Contributor to review them, the track changes feature is automatically enabled. Therefore, you can see exactly what the reviewer modified in the returned document. You can then pick and choose which edits to accept or reject.

## How to Enable the Track Changes Feature

1. Open the content file.
2. Do one of the following, depending on the part of the user interface you are using:
  - **Ribbon Select Review > Track Changes.**
  - **Keyboard Shortcut Press CTRL+SHIFT+E.**

# I Accepting or Rejecting Tracked Changes

You can right-click on tracked changes and use a context menu to accept or reject them individually. You can also use options in the interface to accept or reject each tracked change or all tracked changes in a file. The reject option also removes annotations.

## How to Accept or Reject Tracked Changes

1. Open the content file.
2. Make sure you have changes set to be displayed.
3. You can perform any of the following tasks.

### TO ACCEPT ALL CHANGES IN THE DOCUMENT

Select **Review > Accept Change > Accept All Changes**.

### TO ACCEPT SINGLE CHANGE

- **Ribbon** Click the change you want to accept, and select **Review > Accept Change**.
- OR
- **Right-Click** Right-click the change you want to accept, and from the context menu, select **Accept [Type of Change]**.


### TO REJECT ALL CHANGES IN THE DOCUMENT


Select **Review > Reject Change > Reject All Changes**.


### TO REJECT SINGLE CHANGE

- **Ribbon** Click the change you want to reject, and select **Review > Reject Change**.
- OR
- **Right-Click** Right-click the change you want to reject, and from the context menu, select **Reject [Type of Change]**.

4. Click  to save your work.

 **NOTE** After reviewing annotations in a file, you can delete them if they are no longer needed. See "Deleting Annotations" on page 82.

 **NOTE** When you track changes, every change to the document—along with the user who performed the change—will be stored in the document's markup. When a change is accepted or rejected, all markup designating it as a change is removed. When all changes in the document are resolved, they will not contain any history of changes made and can be considered ready for output.

 **NOTE** By default, tracked changes are visible only in the editor in MadCap Flare, as well as in Central or Contributor (depending on the review method you are using). Tracked changes that have not yet been accepted are not visible when previewing the topic in Flare or when viewing any output generated from it. You can preserve tracked changes in PDF and Word output so unaccepted changes will appear in these outputs.

# Changing the Display of Tracked Changes

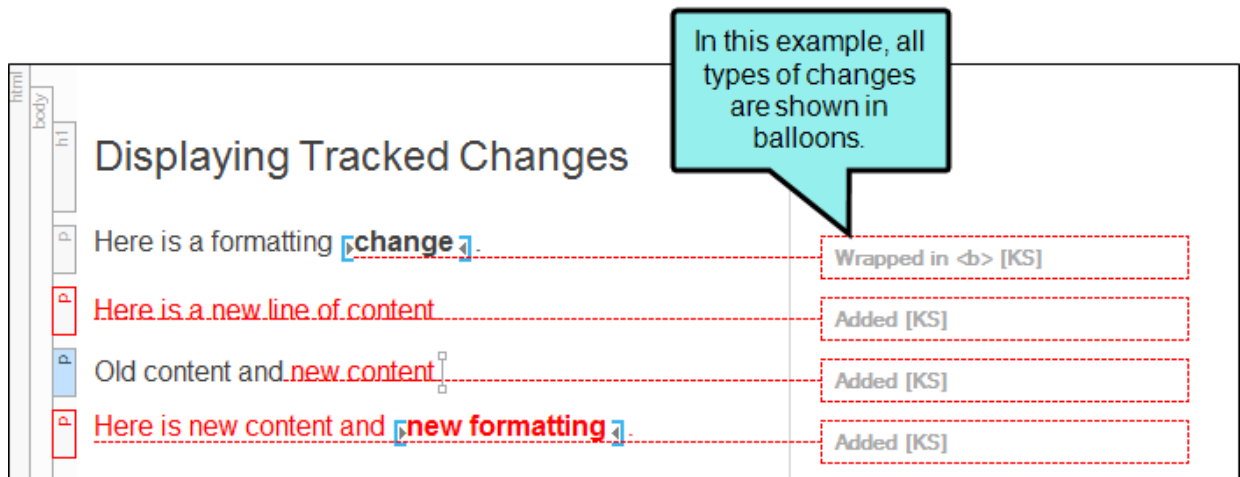
You can change the way tracked changes are displayed in the interface (e.g., in balloons, inline). You can also enable or disable change bars.

## How to Change the Display of Tracked Changes

1. Select **Review > Review Options**.
2. In the **Tracked Change Display** section, choose any of the following.

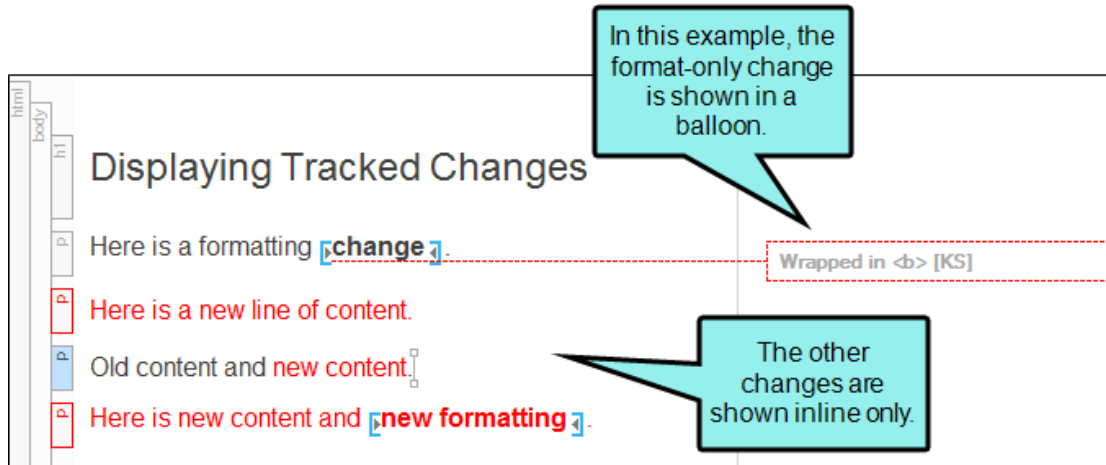
### DISPLAY ALL CHANGES IN BALLOONS

If you select this option, all changes—text and formatting—will be shown in balloons in the sidebar.



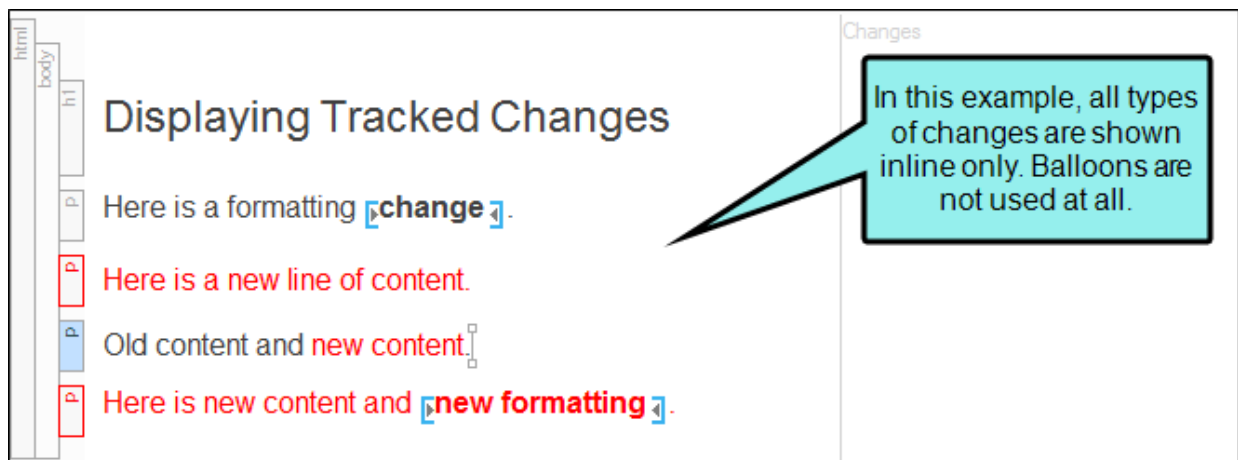
## DISPLAY ONLY FORMAT CHANGES IN BALLOONS

If you select this option, changes that include content only (or content plus formatting) will be shown inline. But changes that contain formatting modifications only will be shown in balloons in the sidebar.

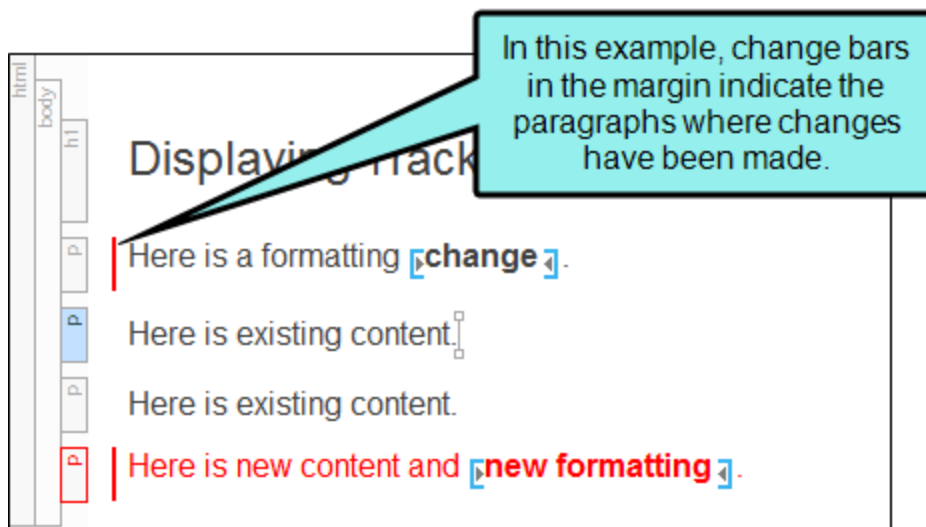


## DISPLAY ALL NON-FORMAT CHANGES INLINE

If you select this option, all text changes will be shown inline. Balloons are not used.



3. In the **Change Bar** section, select whether or not you want to turn on change bars. If you turn on change bars, a bar appears on the left side of the paragraph where a change has been made. Change bars appear in PDF output and the XML Editor.



☆ **EXAMPLE** You are editing a document with track changes turned on. Some of your changes are very large (e.g., removed or added words), and others are small (e.g., fixed typos, changes to single words).

Because all of the changes are important, you decide to turn on change bars. By enabling change bars, a red bar appears next to the paragraph whenever there is a change, regardless of whether it is a large change or a small change.



- ☆ When you publish the PDF output with the changes preserved, readers can scan the document for change bars. When they see a change bar, they know to look in that paragraph for the change. This is easier and faster than skimming the entire document searching for additions or deletions, at the risk of missing an important change.

Four score and seven years ago our fathers brought forth on this continent, a new nation, conceived in Liberty, and dedicated to the proposition that all men are created equal.

Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. ~~We are met on a great battle-field of that war.~~ We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this.

~~Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this.~~

But, in a larger sense, we can not dedicate -- we can not consecrate -- we can not hallow -- this ground. The brave men, living and dead, who struggled here, have consecrated it, far above our poor power to add or detract. The world will little note, nor long remember what we say here, but it can never forget what they did here. It is for us the living, rather than the dead, that we should dedicate this ground to the great task remaining before us -- that we here highly resolve that these dead shall not have died in vain -- that this nation, under God, shall have a new birth of freedom -- and that government of the people, by the people, for the people, shall not perish from the earth.

Abraham Lincoln  
November 19, 1863

When change bars are turned off, it's easy to see the large changes, but the small edits are harder to find.



Four score and seven years ago our fathers brought forth on this continent, a new nation, conceived in Liberty, and dedicated to the proposition that all men are created equal.

Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. ~~We are met on a great battle-field of that war.~~ We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this.

~~Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation might live. It is altogether fitting and proper that we should do this.~~

But, in a larger sense, we can not dedicate -- we can not consecrate -- we can not hallow -- this ground. The brave men, living and dead, who struggled here, have consecrated it, far above our poor power to add or detract. The world will little note, nor long remember what we

do here, but we can dedicate

to the great task remaining

before us -- that we here highly

resolv

that this nation, under God, shall have a new birth of freedom -- and that government of

the people, by the people, for the people, shall not perish from the earth.

Abraham Lincoln

November 19, 1863

Change bars make it easier to spot all of the edits, even the small changes in the first and last line.

4. Click OK.

# I Preserving Tracked Changes in PDF or Word Output

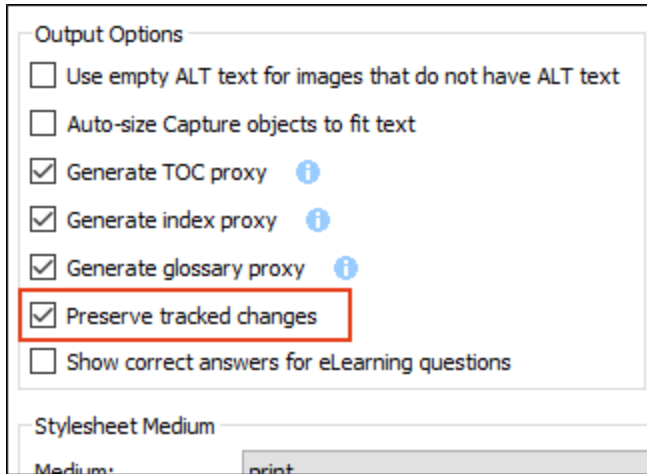
If you have tracked changes in Flare, you can preserve the changes so they are visible when you generate PDF or Word output.

You may want to use tracked changes in a PDF or Word document for a number of reasons. The most common reason to use tracked changes is for internal review processes. For example, if you have many reviewers who only review content occasionally, you may want to use tracked changes in PDF or Word so the reviewers can use familiar software. This may help to speed up the review process.

Another reason to preserve tracked changes in PDF or Word is if you need the reader to see changes in a document. By preserving changes in PDF or Word output (and by using change bars, if necessary), the reader can easily locate new material.

# How to Preserve Tracked Changes

1. Open the target being used for Word or PDF output.
2. Select the **Advanced** tab.
3. In the Output Options section, click the check box next to **Preserve tracked changes**.



4. Click  to save your work.

# Preserving Changes in PDF Output

When you produce PDF output from Flare, the following changes are preserved.

- Annotations
- Concepts proxy
- Conditions
- Cross-references
- Endnotes proxy
- Equations
- Footnotes
- Glossary proxy
- Glossary terms
- Groups/divs
- Images
- Index proxy
- Inline styles
- Links
- List-of proxy
- Lists
- Mini-TOC proxy
- Page headers/footers for template pages
- QR codes
- Relationships proxy
- Snippet conditions
- Snippet variables

- Snippets (insertion/deletion)



**NOTE** Inserting or deleting a snippet tracks the entire snippet. Changes within a snippet are not reflected in the output.

- Style classes
- Style IDs
- Tables
- Text effects
- TOC proxy
- Variables



**NOTE** Some changes are tracked using change bars. You can enable change bars in the Options dialog (**Review > Review Options**).



**NOTE** Tracked changes may not be visible in all PDF readers.


☆ EXAMPLE You tracked changes in Flare.

San Diego Attractions

There are many places to visit in San Diego. Three of these are [Balboa Park](#), the [San Diego Zoo](#), and [Petco Park](#).

### BALBOA PARK

Balboa Park is a 1200 acre park in ~~the middle of downtown San Diego~~. ~~Inside the park are gardens, walking paths, and more than a dozen museums.~~ Every year the park hosts hundreds of events, including concerts, marathons and races, festivals and parades, ~~food and beer tastings,~~ and guest ~~speakers~~.



SAN DIEGO ZOO

The San Diego Zoo was founded in 1916 and is located inside of Balboa Park. It is home to more than 3700 rare and endangered animals, and more than 700,000 exotic plants. Among the animals at the zoo are giant pandas, gorillas, koalas, and jaguars.

XML Editor changes shown in the right sidebar:

- <MadCap:dropDownHotspot> style added [KS] New value: "font-size: 14pt;"
- Deleted [KS]
- Added [KS]
- Annotation [KS] Add a link to the Balboa Park website.
- Added [KS]
- <MadCap:dropDownHotspot> style added [KS] New value: "font-size: 14pt;"
- <p> MadCap:conditions changed Old value: "Default: ScreenOnly" New value: "Default: PrintOnly"

Callout 1: Your changes in Flare appear in the sidebar and throughout the document

Callout 2: Change bars have been enabled in the Options dialog, so a red line in the margin of the XML Editor indicates where your changes are.


☆ If you preserve the tracked changes when you build your output in PDF, the changes will appear like this:

**San Diego Attractions**

There are many places to visit in San Diego. Three of these are **Diego Zoo**, and **Petco Park**.

**BALBOA PARK**

Balboa Park is a 1200 acre park in ~~the middle of~~ downtown San Diego. Inside the park are gardens, walking paths, and more than a dozen museums. Every year the park hosts hundreds of events, including concerts, marathons and races, festivals and parades, **food and beer tastings**, and guest speakers.



**SAN DIEGO ZOO**

The San Diego Zoo was founded in 1916 and is located inside of Balboa Park. It is home to more than 3700 rare and endangered animals, and more than 700,000 exotic plants. Among the animals at the zoo are giant pandas, gorillas, koalas, and jaguars.

**Comments Pane:**

- 8 Comments
- <MadCap:dropDownHotspot> style added [KS] New value: "font-size: 14pt;" 1/14/2016 3:17:06 PM ----- Page 7
- Deleted [KS] 1/14/2016 3:16:05 PM ----- Page 7
- Added [KS] 1/14/2016 3:16:33 PM ----- Page 7
- Annotation [KS] Add a link to the Balboa Park website. Page 7
- Added [KS] 2/4/2016 4:26:42 PM ----- Page 7
- <p> MadCap:conditions changed [KS] Old value: "Default.ScreenOnly" New value: "Default.PrintOnly"

**Callout 1:** You can hover over any change in the document to see details about that change.

**Callout 2:** If you enable change bars in the Options dialog, you can easily see where all of the changes are.

**Callout 3:** Details about each change appear in the comments pane.





# Preserving Changes in Word Output


When you produce Word output from Flare, the following changes are preserved:

- Annotations
- Concepts proxy
- Conditions
- Cross-references
- Endnotes proxy
- Equations
- Footnotes
- Glossary proxy
- Glossary terms
- Groups/divs
- Image formatting
- Images
- Index proxy
- Inline styles
- Links
- List-of proxy
- Lists
- Mini-TOC proxy
- Page headers/footers for template pages
- QR codes
- Relationships proxy
- Snippet conditions
- Snippet variables
- Snippets (insertion/deletion)
- Style classes

- Style IDs
- Tables, including insertion/deletion of rows and columns
- Text effects
- TOC proxy
- Variables


 **NOTE** Several items are tracked in the margin (using Word's built-in change bars), including proxies, images, equations, keywords, QR codes, and variables.

 **NOTE** If a change consists of multiple attribute changes, only the final attribute change is shown. Likewise, if you have multiple endnote or TOC proxies in your document, only the final one is shown.

 **NOTE** Divs are added to Word as tables.

 **NOTE** Page numbers in relationship proxies are not tracked.

 **NOTE** Running Head variables (Running HFs) are not tracked as changes.

 **NOTE** Inserting or deleting a snippet tracks the entire snippet. Changes within a snippet are not reflected in the output.


☆ EXAMPLE You tracked changes in Flare.

San Diego Attractions

There are many places to visit in San Diego. Three of these are [Balboa Park](#), the [San Diego Zoo](#), and [Petco Park](#).

### BALBOA PARK

Balboa Park is a 1200 acre park in ~~the middle of downtown San Diego~~. ~~Inside the park are gardens, walking paths, and more than a dozen museums.~~ Every year the park hosts hundreds of events, including concerts, marathons and races, festivals and parades, ~~food and beer tastings, and guest speakers~~.



### SAN DIEGO ZOO

The San Diego Zoo was founded in 1916 and is located inside of Balboa Park. It is home to more than 3700 rare and endangered animals, and more than 700,000 exotic plants. Among the animals at the zoo are giant pandas, gorillas, koalas, and jaguars.

Annotations in the right sidebar:

- <MacCap:dropDownHotspot> style added [KS]  
New value: "font-size: 14pt;"
- Deleted [KS]
- Added [KS]
- Annotation [KS]  
Add a link to the Balboa Park website.
- Added [KS]
- <MacCap:dropDownHotspot> style added [KS]  
New value: "font-size: 14pt;"
- <p> MadCap:conditions changed  
Old value: "Default: ScreenOnly"  
New value: "Default: PrintOnly"

Callout boxes:

- Your changes in Flare appear in the sidebar and throughout the document
- Change bars have been enabled in the Options dialog, so a red line in the margin of the XML Editor indicates where your changes are.

☆ If you preserve the tracked changes when you build your output in Word, the changes will appear like this:

**San Diego Attractions**

There are many places to visit in San Diego. Three of these are **Balboa Park**, the **San Diego Zoo**, and **Petco Park**.

**BALBOA PARK**

Balboa Park is a 1200 acre park in ~~the middle of~~ downtown San Diego. Inside the park are gardens, walking paths, and more than a dozen museums. Every year the park hosts hundreds of events, including concerts, marathons and races, festivals and parades, food and beer tastings, and guest speakers.

**SAN DIEGO ZOO**

The San Diego Zoo was founded in 1916 and is located inside of Balboa Park. It is home to more than 3700 rare and endangered animals, and more than 700,000 exotic plants. Among the animals at the zoo are giant pandas, gorillas, koalas, and jaguars.

**kschneider**  
Formatted: Font: 14 pt

**kschneider**  
Formatted: dropDownHead

**kschneider**  
Add a link to the Balboa Park website.

**kschneider**  
Formatted: Font: 14 pt

**kschneider**  
Formatted: dropDownHead

**KSchneider**  
New condition value: Default.PrintOnly. Old condition value: Default.ScreenOnly.

If you enable review mode in the output, Word will automatically track any additional changes you make in the output.

**REVIEW** | VIEW | ACROBAT

New Comment | Delete Comment | Previous | Next | Show Comments | Track Changes | Reviewing Pane | All Markup

**San Diego Attractions**

There are many places to visit in San Diego. Three of these are **Balboa Park**, the **San Diego Zoo**, and **Petco Park**.

**BALBOA PARK**

Balboa Park is a 1200 acre park in ~~the middle of~~ downtown San Diego. Inside the park are gardens, walking paths, and more than a dozen museums. Every year the park hosts hundreds of events, including concerts, marathons and races, festivals and parades, food and beer tastings, and guest speakers.

**Kate Schneider**  
Formatted: Font: Cooper Black, Font color: Red

**kschneider**  
Formatted: dropDownHead

**kschneider**  
Add a link to the Balboa Park website.

# I Viewing Files With Changes

You can view a list of files with tracked changes (and annotations). You can then open the file where the changes are located and deal with them appropriately (e.g., accept or reject changes).

## How to View Files With Changes

1. elect **Analysis > More Reports > Files With Changes**.

The Files With Changes window pane opens. The area at the bottom of the window pane displays all topics in your project where tracked changes have been made.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
  - **File** Displays the name of the file.
  - **Title** Displays the properties title of the file (if any).
  - **Folder** Displays the folder where the file is found.
  - **Change** Displays the type of change that was made.
  - **Initials** Displays the initials of the individual who made the change.
  - **Creator** Displays the user name of the individual who made the change.
  - **Timestamp** Displays the date and time when the change was made.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
4. You can double-click any file in the list to accept or reject the changes.

## CHAPTER 6

---

# Annotations

You can work with annotations (document comments) in many ways.

This chapter discusses the following:

Inserting Annotations .....	79
Editing Annotations .....	81
Deleting Annotations .....	82
Viewing Files With Annotations .....	83
Finding Changes .....	84
Hiding and Showing Changes and Annotations .....	85
Changing the User Color for Reviews .....	86
Changing Your User Name and Initials .....	88

# I Inserting Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use.

Annotations are especially useful as part of the document review process. The following steps show how to insert an annotation in Flare. If you have sent a file for review on MadCap Central, annotations can also be inserted in the Central interface. For more, see the Central online Help.

## How to Insert an Annotation

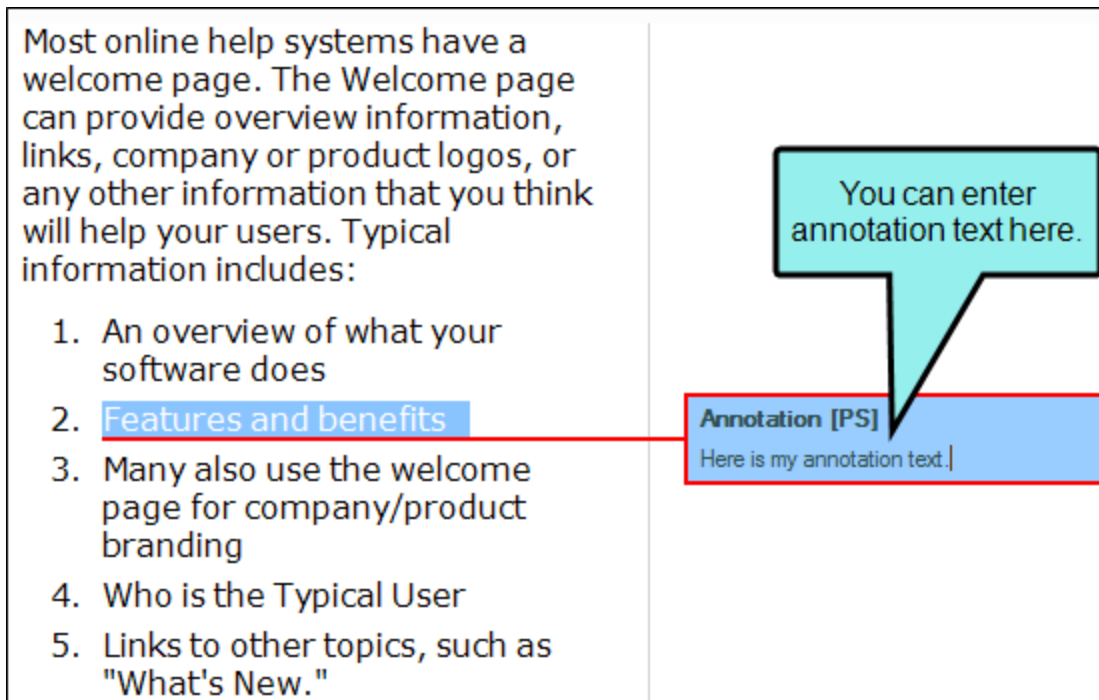
1. Open the content file.
2. Highlight the content that you want to associate with the annotation, or place your cursor on it.

 **NOTE** Do not highlight more than one paragraph.

3. Select **Review > Insert Annotation**. Alternatively, if the track changes feature is enabled, you can right-click and select **Insert Annotation**.

A rectangle extends to a sidebar on the right, with a line pointing to the selected content. Also, the selected content is shaded, indicating that the annotation refers to that text. However, the shading will not be displayed in the output; it is for internal use only.

4. Type your comment in the annotation rectangle.



The screenshot shows a help system interface. On the left, there is a text block: "Most online help systems have a welcome page. The Welcome page can provide overview information, links, company or product logos, or any other information that you think will help your users. Typical information includes:" followed by a numbered list. The second list item, "Features and benefits", is highlighted in blue. A red line connects this item to a blue annotation box on the right. The annotation box contains the text "Annotation [PS]" and "Here is my annotation text." A light blue speech bubble points to the annotation box with the text "You can enter annotation text here."


Most online help systems have a welcome page. The Welcome page can provide overview information, links, company or product logos, or any other information that you think will help your users. Typical information includes:

1. An overview of what your software does
2. Features and benefits
3. Many also use the welcome page for company/product branding
4. Who is the Typical User
5. Links to other topics, such as "What's New."

You can enter annotation text here.

Annotation [PS]  
Here is my annotation text.]

5. Click  to save your work.

 **NOTE** When you insert an annotation, your initials are displayed next to it. The initials are the first two letters of your login user name. However, you can change the user name and initials (for use in Flare) to something else. For more information see the online Help.




# I Editing Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use.

You can easily make changes to an annotation. The following steps show how to edit an annotation in Flare. If you have sent a file for review on MadCap Central, annotations can also be edited in the Central interface. For more, see the Central online Help.

## How to Edit Annotations

1. Select **Review > Show Changes**.
2. Click in the rectangle containing the annotation text and make your changes.
3. Click  to save your work.

# I Deleting Annotations

You can delete annotations that have been inserted into a content file (e.g., topic, snippet).

## How to Delete Annotations

1. Open the content file.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 85.
3. Do one of the following, depending on the part of the user interface you are using:

### TO DELETE ALL ANNOTATIONS IN THE DOCUMENT

- a. Select **Review > Delete Annotation > Delete All Annotations**.
- b. Click **Yes**.

### TO DELETE A SINGLE ANNOTATION

#### ■ Ribbon

- a. Select **Review > Delete Annotation**.
- b. Click **Yes**.

#### ■ Right-Click

- Right-click on the annotation you want to delete, and from the context menu, select **Delete Annotation**.

4. Click  to save your work.

# I Viewing Files With Annotations

You can view a list of all files where annotations (internal comments) have been inserted. You can also double-click a row to open the topic in question.

## How to View Files With Annotations

1. elect **Analysis > More Reports > Files With Annotations**.

The Files With Annotations window pane opens. The area at the bottom of the window pane displays all topics in your project where annotations have been inserted.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
  - **File** Displays the name of the file.
  - **Title** Displays the properties title of the file (if any).
  - **Folder** Displays the folder where the file is found.
  - **Text** Displays the annotation text.
  - **Initials** Displays the initials of the individual who inserted the annotation.
  - **Creator** Displays the user name of the individual who create the annotation.
  - **Editor** Displays the user name of the individual who last edited the annotation.
  - **Create Date** Displays the date and time when the annotation was created.
  - **Edit Date** Displays the date and time when the annotation was last edited.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.

# I Finding Changes

You can use navigation buttons in the Review ribbon to quickly navigate to the previous or next tracked change or annotation in the file.

## How to Find Changes

1. Open the content file.
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on the next page.
3. Select **Review > Next Change** or **Review > Previous Change**.

# I Hiding and Showing Changes and Annotations

You can hide or show tracked changes and annotations in the active document.

1. Open the content file.
2. Select **Review > Show Changes**.

# Changing the User Color for Reviews

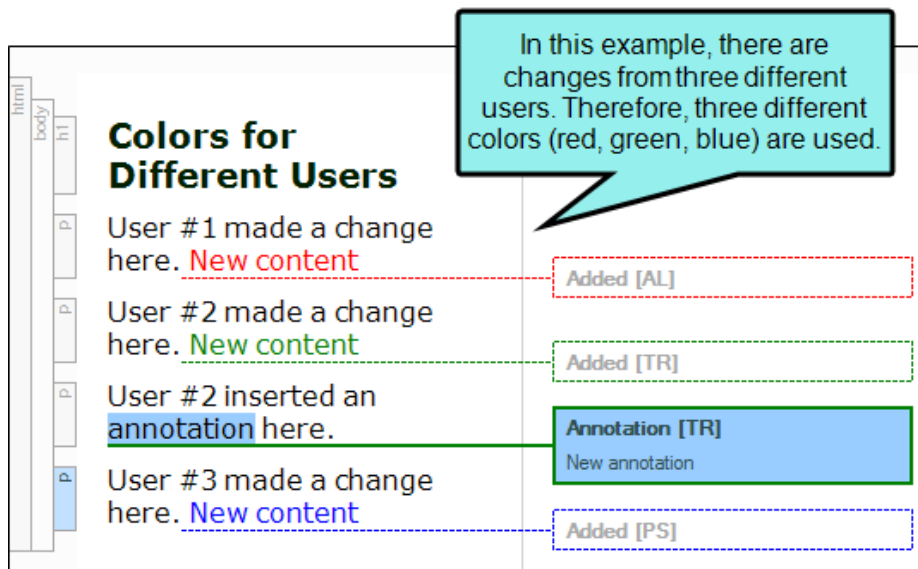
The tracked changes and annotations for each user can be shown in a separate color. You also have the option of choosing a specific color for all users.

## How to Change the User Color for Reviews

1. Select **Review > Review Options**.
2. In the **User Colors** section, choose one of the following.

### USE A DIFFERENT COLOR FOR EACH USER

Select this option if you want Flare to automatically assign a different color for each user.



## USE THE SAME COLOR FOR ALL USERS

Select this option if you want all changes, regardless of the user, to display in the same color. After you choose this option, click the down arrow below to select a color.

In this example, there are changes from three different users. But the same color (in this case, red) is used to display all of the changes, regardless of the user.

**Colors for Different Users**

User #1 made a change here. **New content**

User #2 made a change here. **New content**

User #2 inserted an **annotation** here.

User #3 made a change here. **New content**

Added [AL]

Added [TR]

Annotation [TR]  
New annotation

Added [PS]

3. Click OK.

# Changing Your User Name and Initials

When you first install and launch Flare, your login user name is captured and stored in the Review tab of the Options dialog (**File > Options**). The first two letters of the user name are also stored as your initials. This information is employed whenever you use the track changes and annotations features.

For example, if you insert an annotation in a topic, your initials are displayed at the beginning of the comment so that other users know where the annotation came from.

You can always change your Flare user name or initials to something else.

☆ **EXAMPLE** Your login user name is "johndoe." In that case, your initials are stored automatically as "jo." Although you want to keep your user name as is, you want to change the initials to "jd," which other users will more readily associate with you. Therefore, you open the Options dialog (**File > Options**) and use the Review tab to change only your initials.

## How to Change the User Name and Initials for Reviews

1. Select **Review > Review Options**.
2. Change the text in either the **User Name** or **Initials** fields.
3. Click **OK**.



## APPENDIX

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# PDFs

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

## I Tutorials

*Autonumbers Tutorial*

*Back-to-Top Button Tutorial*

*Context-Sensitive Help Tutorial*

*Custom Toolbar Tutorial*

*eLearning Tutorial—Basic*

*eLearning Tutorial—Advanced*

*Getting Started Tutorial*

*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*