

MADCAP FLARE 2024 r2

Word Import

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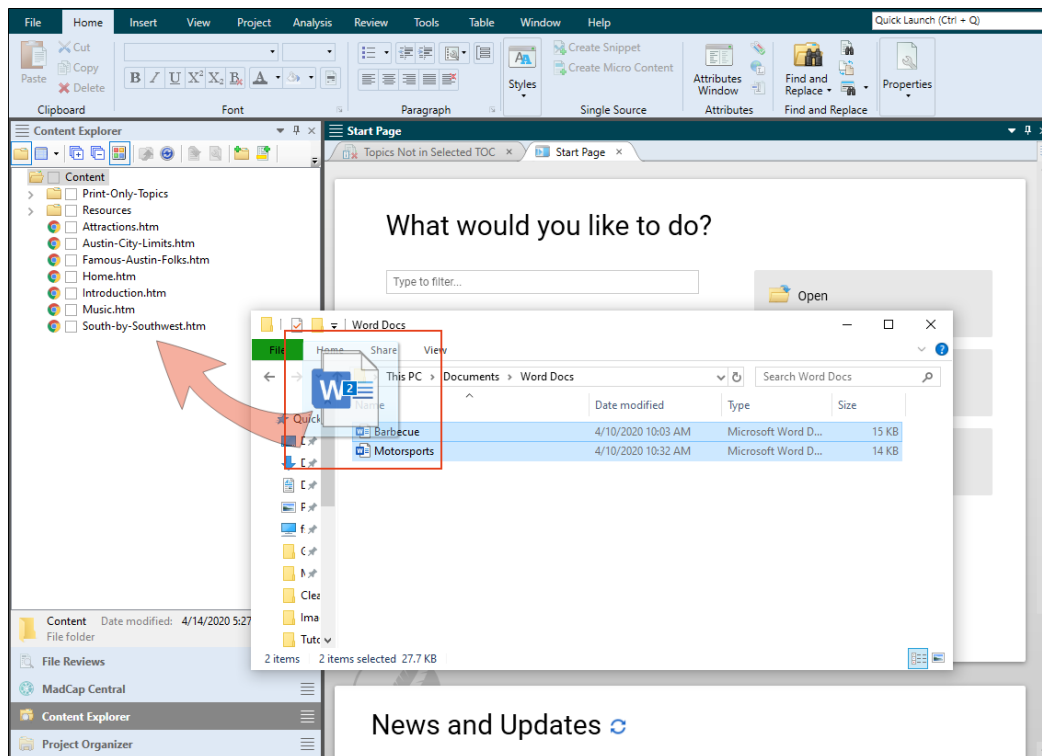
CHAPTER 1

Welcome

Approximate Time: 15 minutes

Welcome to the Flare Word Import Tutorial.

- **Tutorial Goal** Learning how to import Microsoft Word documents into a Flare project.
- **Key Concepts** Dragging Word files into the Content Explorer, starting with a clean Word document, using the Import Microsoft Word Wizard, and mapping styles.



CHAPTER 2

Before We Begin

Before we begin this tutorial, there are just a few things you should know.

This chapter discusses the following:

Word Files for This Tutorial	7
Installation of Word	7
Importing Methods	8
Using Clean Word Documents	9

I Word Files for This Tutorial


The steps for this tutorial involve importing Word files into Flare's Austin template project. The files have been prepared and are ready for you to download to your local device. Download the zip file from:

<https://docs.madcapsoftware.com/tutorial-assets/flare/Word-Import-Files.zip>

Extract and save the two documents to any location you want. Go ahead and open the documents to see what they look like. The documents include some content, paragraph styles, an embedded image, and a list for importing.

I Installation of Word

For the best performance Microsoft Word should be installed on your computer. However, this is not an absolute requirement.

 **NOTE** You might be aware of an option in **File > Options > General** regarding importing Word files. If MS Word is installed on your computer, do not select the **Import/Export Word Files without MS Office** box. This option should only be selected if you do not have Word installed.

I Importing Methods

There are several different ways you can add Word documents into Flare, and during the import process you can specify through options how you want those files to handle the conversion.

Since we are basing this tutorial on Flare's Austin template, we are focusing on dragging and dropping files into the existing project and then going over some importing options.

The topics in the online Help about importing Word provide details on all import methods and options. The approach you ultimately adopt really depends on your project and workflow.


But regardless of method, importing Word documents encompasses a basic two-step process: 1) creating an import file (stored in the Project Organizer Import folder), and 2) populating and using file settings to perform the import into Flare.

I Using Clean Word Documents

The intention of this tutorial is not to show you how to prepare your Word documents for import, but rather to step you through a common scenario for importing your document files into Flare. It is important to keep in mind that the cleaner a Word document is before import, the cleaner the documentation is after the import process. A clean document means:

- Using an error-free Word document.
- Removing any inline formatting.
- Using paragraph and/or character styles in Word.

For more information, see the online Help.

 **NOTE** It is recommended to create a style-formatted document in MS Word. If members of your team resort to direct formatting, teach them how to apply formatted styles to a document. This avoids or at least reduces the odds of having to reformat after the imported content gets into Flare.

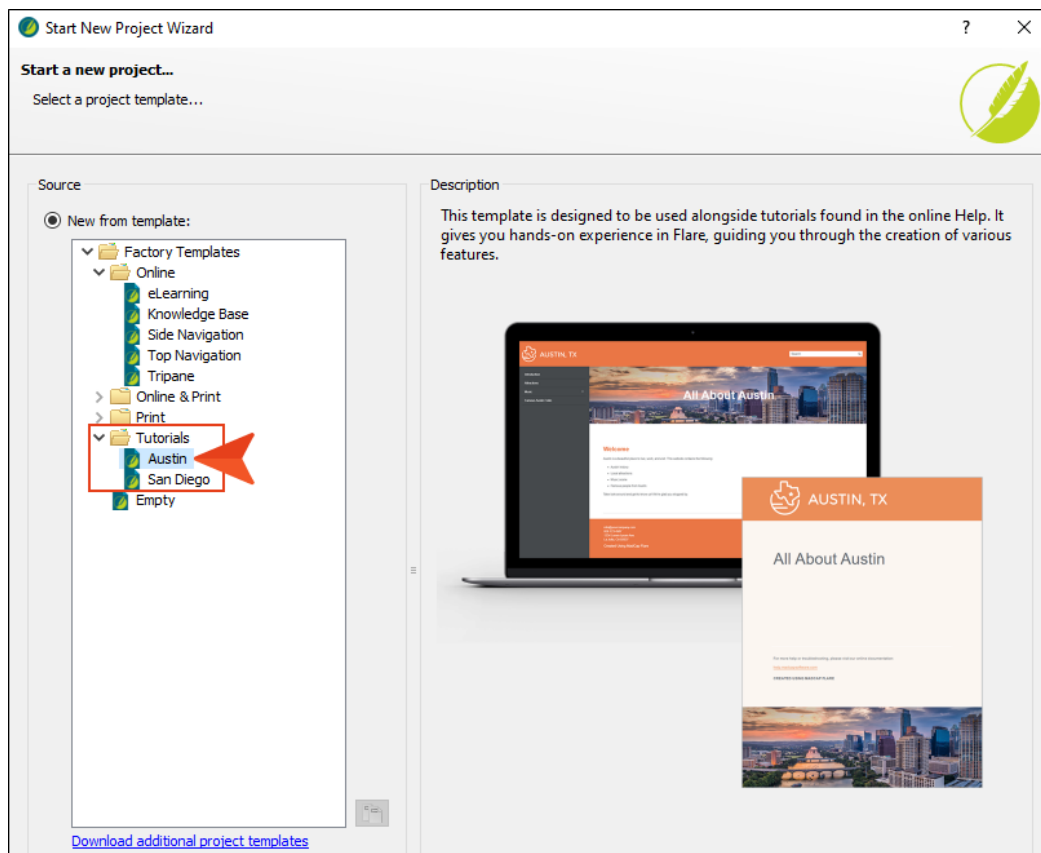
CHAPTER 3

Creating a Project From a Template

To start, let's create a new project based on Flare's Austin template.

I How to Create a New Project From a Template

1. Select **File > New Project**. The Start New Project Wizard opens.
2. In the **Project name** field, give your project any name you want.
3. (Optional) In the **Project folder** field, you can enter a location where you want to save your project. By default, projects are saved in your Documents > My Projects folder.
4. Click **Next**.
5. Under **Factory Templates**, expand the **Tutorials** folder. Select the **Austin** template.



6. Click **Next**.
7. For branding, keep the default settings. (This is where you could customize your project's look with branding, such as colors and logo.) Click **Next**.
8. Click **Finish**. The project is created and loaded into Flare.

Dragging and Dropping Word Files Into Flare

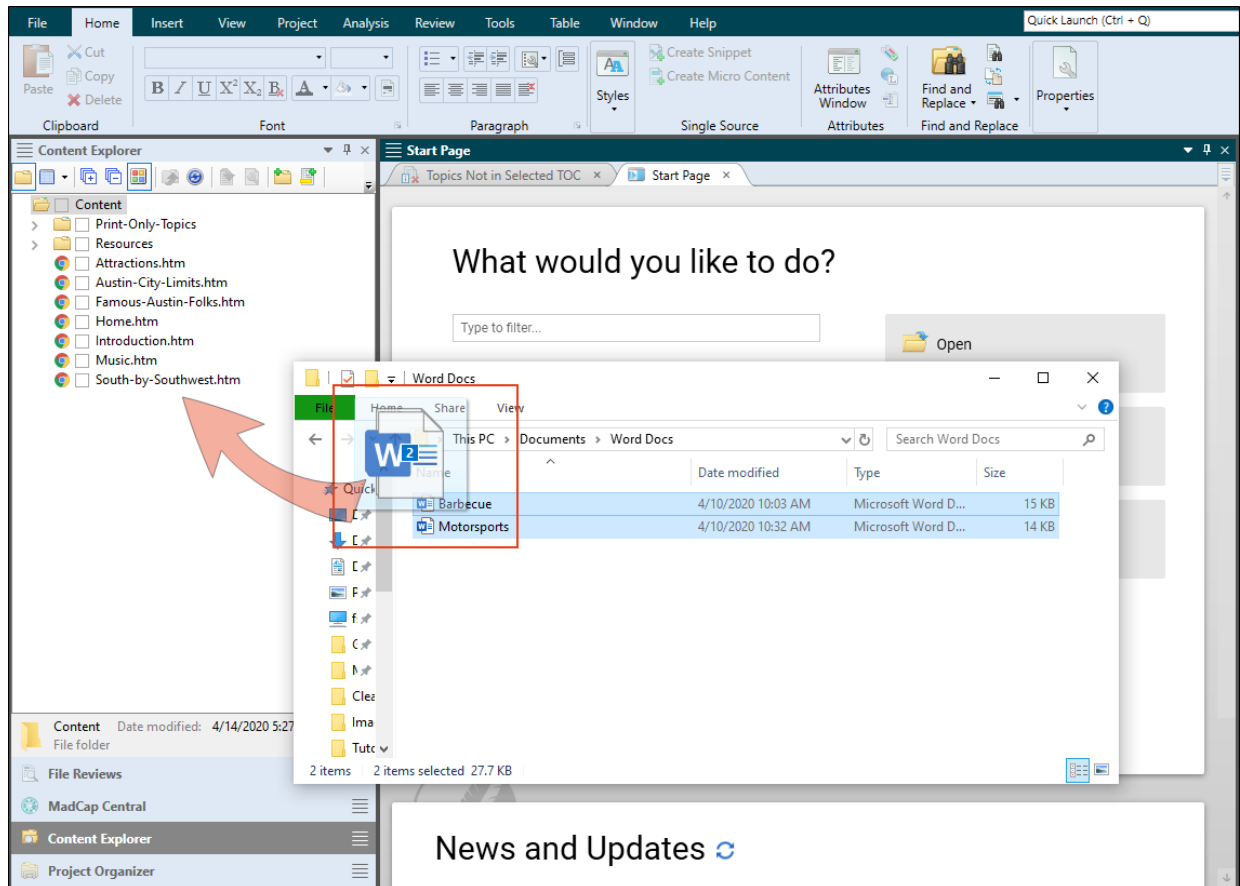
Dragging and dropping Word files into your Flare project is easy to do and fast. Single or multiple docs can be selected at once, and you can quickly customize how files are imported through the user-friendly wizard.

This chapter discusses the following:

How to Drag and Drop Word Files	13
How to Work With the Wizard	15
How to Map Styles	17
How to Set Advanced Options	20
How to Open Imported Topics in the XML Editor	23

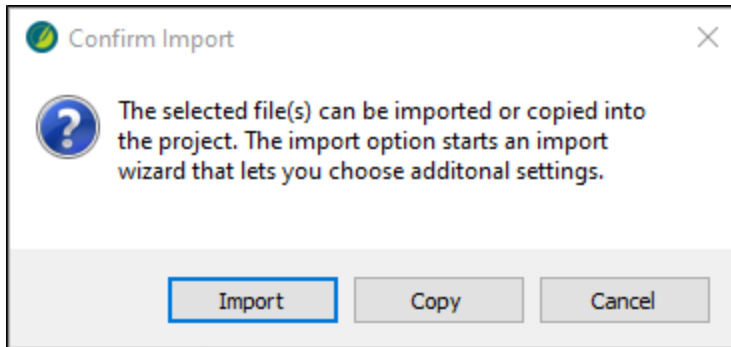
How to Drag and Drop Word Files


1. With your new project open in Flare, launch your operating system's File Explorer.
2. From the File Explorer, navigate to the recently downloaded files for this tutorial. See "Word Files for This Tutorial" on page 7.
3. Select the two Word files, and drag and drop them into the root Content folder in Flare's Content Explorer. Placing the files at the root level adds them next to the other existing files about Austin.



✓ **TIP** When creating your own project, you can organize your files however you want. With larger projects it is logical to create subfolders under the root Content folder.

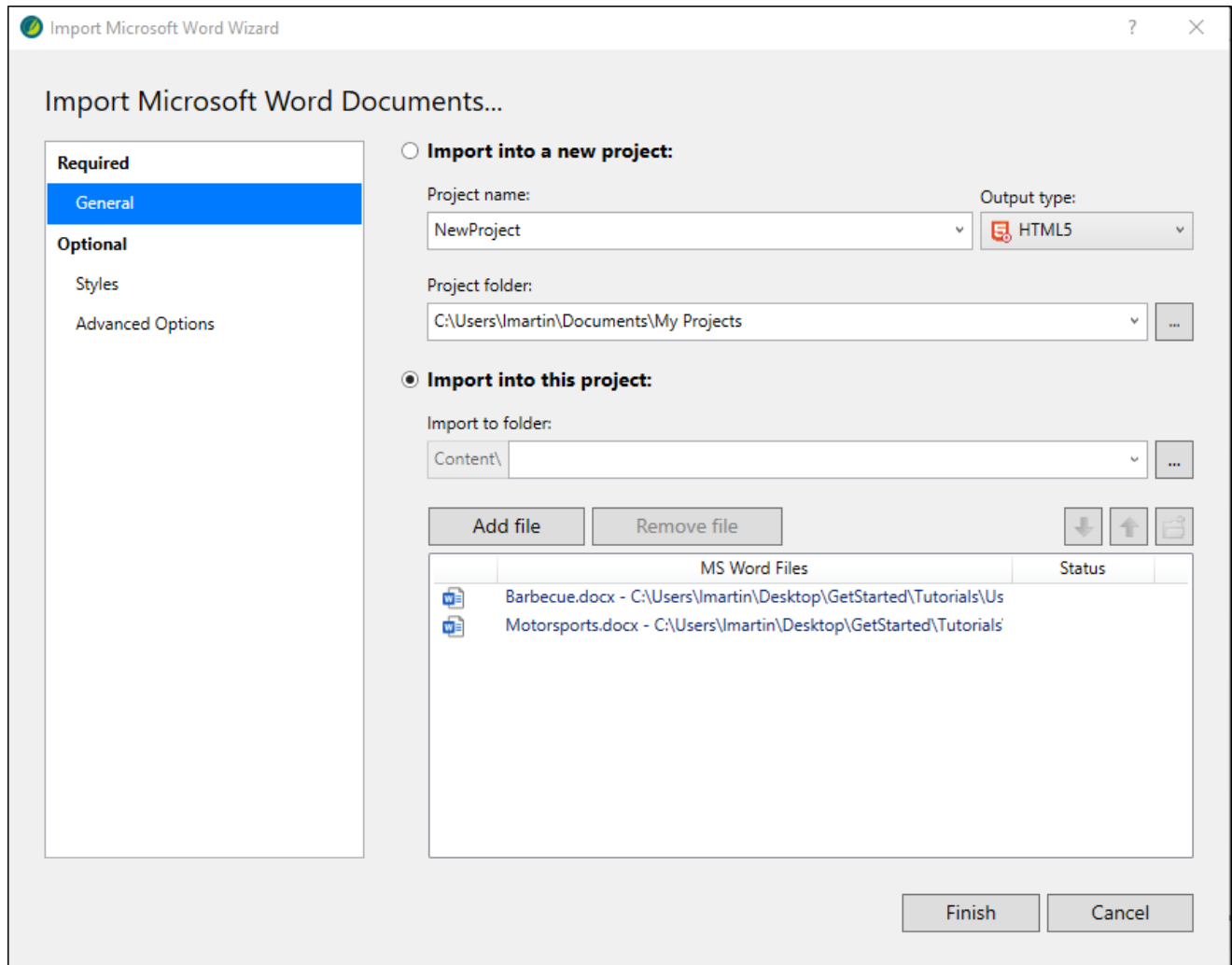
4. Since dragging and dropping Word files includes an import process in Flare, a Confirm Import dialog opens. Select the **Import** button.



 **NOTE** The Confirm Import dialog includes a Copy button. Selecting this option would just make a copy of the Word document and paste it into the Content Explorer as a Word doc rather than converting the file(s) to HTML format.

I How to Work With the Wizard

Flare scans the import and automatically opens the Import Microsoft Word Wizard. If you're in a hurry, you could just select the Finish button at the bottom of the wizard (Flare would break the documents up into HTML files based on the Word style headings). But wait! Let's see what the wizard has to offer to customize the import.




1. In the left pane, select **General** (if it is not selected already). For this exercise, we want to import the Word docs into the open Austin project, not into a new project. On the right, ensure that **Import into this project** is selected, and that the two documents have been added and display under the MS Word Files column.
2. In the left pane, select **Styles**. On the right, Flare lets you associate another stylesheet to the import process which would introduce more styles to the style mapping table from that new stylesheet. In this tutorial we are using the factory stylesheet (the Word styles get appended to the Flare stylesheet), so let's ignore the "Associate a stylesheet" field.

I How to Map Styles

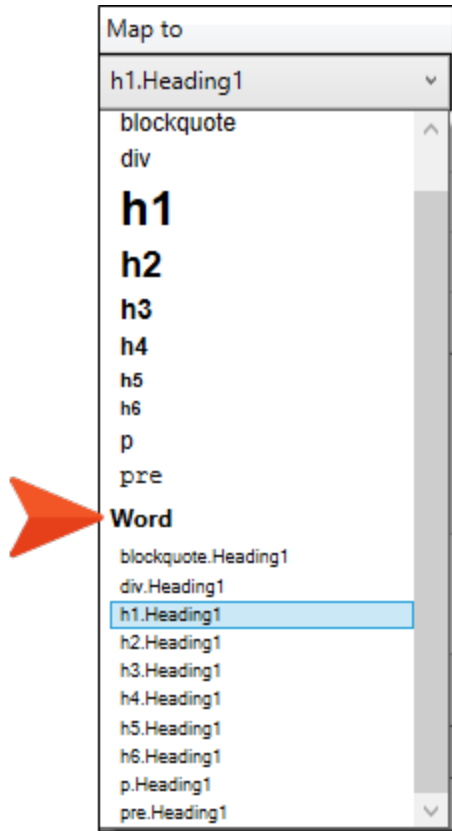
Being able to map styles in Flare is useful and time-saving for getting content into a project, but it works best if the document for import is created using styles. With the Style Mapping feature, topic breaks logically happen at heading styles, but you can create topic breaks anywhere by selecting other styles.

1. Let's take a look at the Style Mapping Paragraph options. In the left column you see the styles from the Word documents, and in the middle column you see how those Word styles mapped to the Flare style.

Paragraph		
MS Word Style	Map to	<input type="checkbox"/> Start new topic on
Heading 1	<input type="text" value="h1.Heading1"/>	<input checked="" type="checkbox"/>
Heading 2	<input type="text" value="h2.Heading2"/>	<input type="checkbox"/>
Heading 3	<input type="text" value="h3.Heading3"/>	<input type="checkbox"/>
List Paragraph	<input type="text" value="p.ListParagraph"/>	<input type="checkbox"/>

 **NOTE** This tutorial does not include any character styles, but note that the Style Mapping Character options work in the same way as the Paragraph options. When working with your own Word documents, be sure to remove any inline formatting and use Word character styles instead.

- In the **Map to** column, click the down-arrow next to **h1.Heading1**. Notice how the Word styles are appended to the Flare styles in the list.



- For this import, we want the Word headings to mimic the Flare heading styles. Select **h1** to replace the h1.Heading1 style, and select **h1** to replace the h2.Heading2 style.

Paragraph		
MS Word Style	Map to	<input type="checkbox"/> Start new topic on
Heading 1	h1	<input checked="" type="checkbox"/>
Heading 2	h1	<input checked="" type="checkbox"/>
Heading 3	h3.Heading3	<input type="checkbox"/>
List Paragraph	p.ListParagraph	<input type="checkbox"/>

4. For Heading 1 and Heading 2, select the **Start new topic on** box in the right column. When the files get imported, the mapped styles display in Flare as multiple topics and each topic shows as its own HTML file.

Paragraph		
MS Word Style	Map to	<input type="checkbox"/> Start new topic on
Heading 1	h1	<input checked="" type="checkbox"/>
Heading 2	h1	<input checked="" type="checkbox"/>
Heading 3	h3.Heading3	<input type="checkbox"/>
List Paragraph	p.ListParagraph	<input type="checkbox"/>

I How to Set Advanced Options

1. In the left pane of the wizard, select **Advanced Options**. The options you choose for your project depends on the needs of your project, but many times using the default settings is a good place to start.
2. For this tutorial, do the following to make your settings match the image below:
 - In **Styles**, deselect **Create new stylesheet**. In this example, let's use Flare's factory stylesheet. The imported Word styles get added to the project's primary stylesheet.
 - In **Topics**, select **Automatically set topic title** and **Avoid empty topics threshold**.
 - In **Lists**, select **Use standard list style type**.

Styles ⓘ

Create new stylesheet

Convert inline formatting to CSS styles ▾

Topics ⓘ

Automatically set topic title

Avoid empty topics threshold: 50 ▾ characters

Split long topics threshold: 10000 ▾ characters

Add continued links

(continued in {title}) ▾ Edit...

Add continued from links

(continued from {title}) ▾ Edit...

Approximate filename length: 24 ▲▼ characters

Tables ⓘ

Convert all tables to "auto-fit to contents"

Set first row of each table as a header row

Create CSS table styles in regular stylesheet ▾

Lists ⓘ

Use standard list style type

Equations ⓘ

Convert equations to MathML

Page Layouts ⓘ

Create a page layout for each section header/footer


Page Breaks ⓘ

Preserve and convert to MadCap page breaks ▾

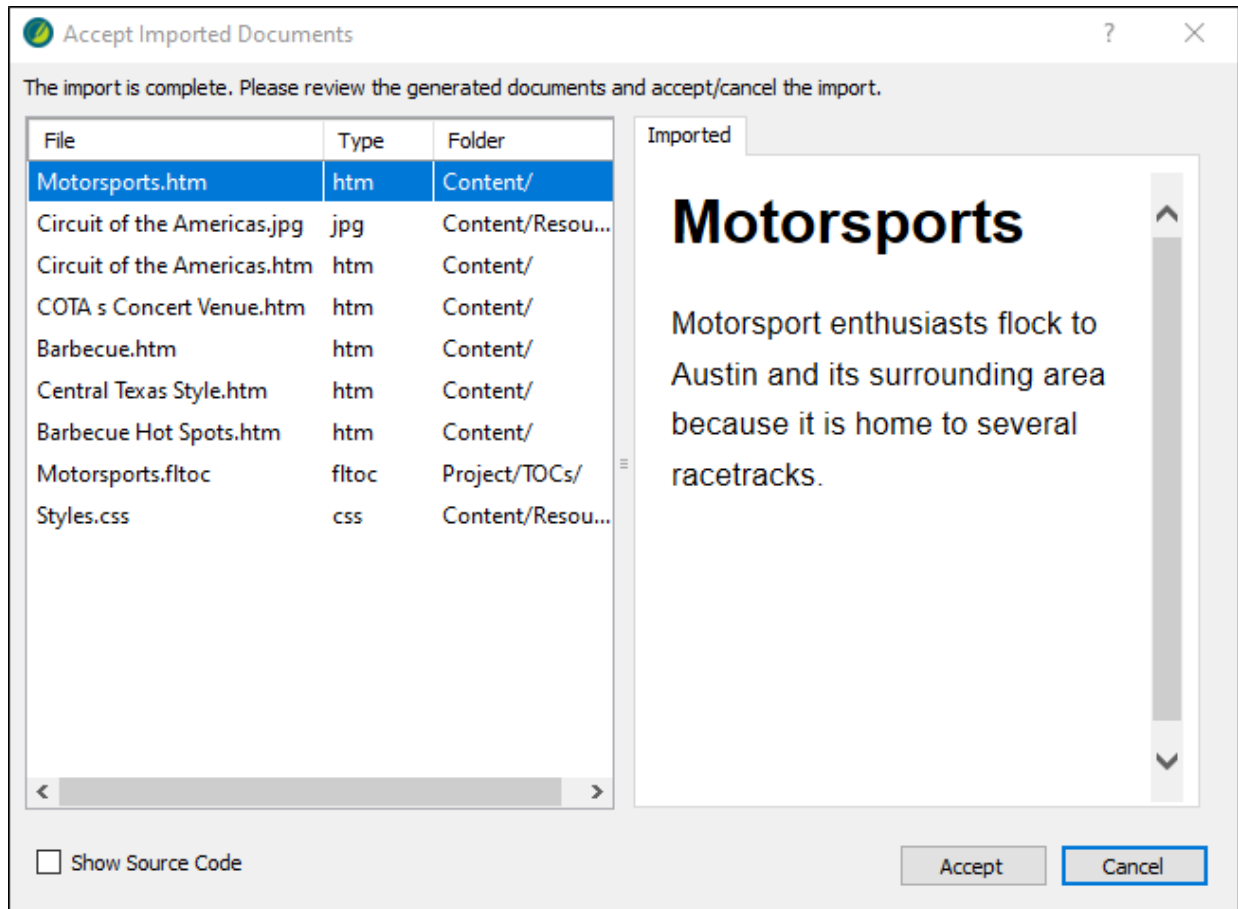
Reimport ⓘ

Link generated files to source files

Auto-reimport before generate output

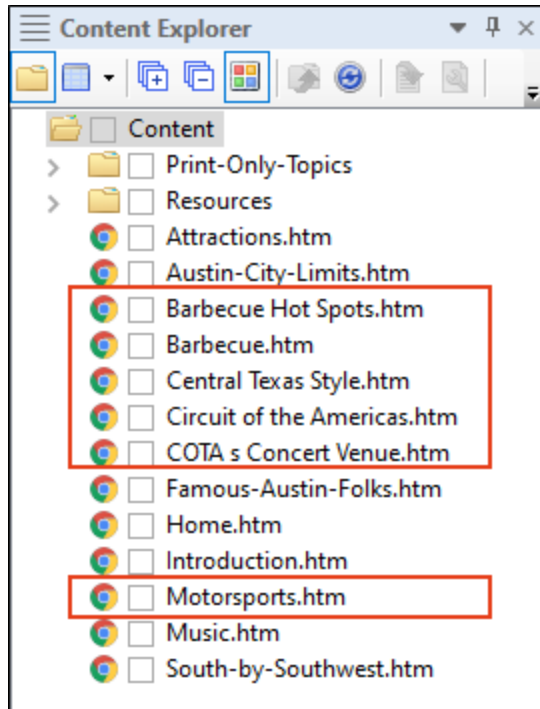
 **NOTE** When importing a Word document, the wizard provides many advanced options for styles, topics, tables, lists, equations, page layouts, page breaks, and reimport. All of the options are explained in the online Help.

3. Select the **Finish** button.
4. The Accept Imported Documents dialog opens to view the generated documents for import. Select **Accept**.



I How to Open Imported Topics in the XML Editor

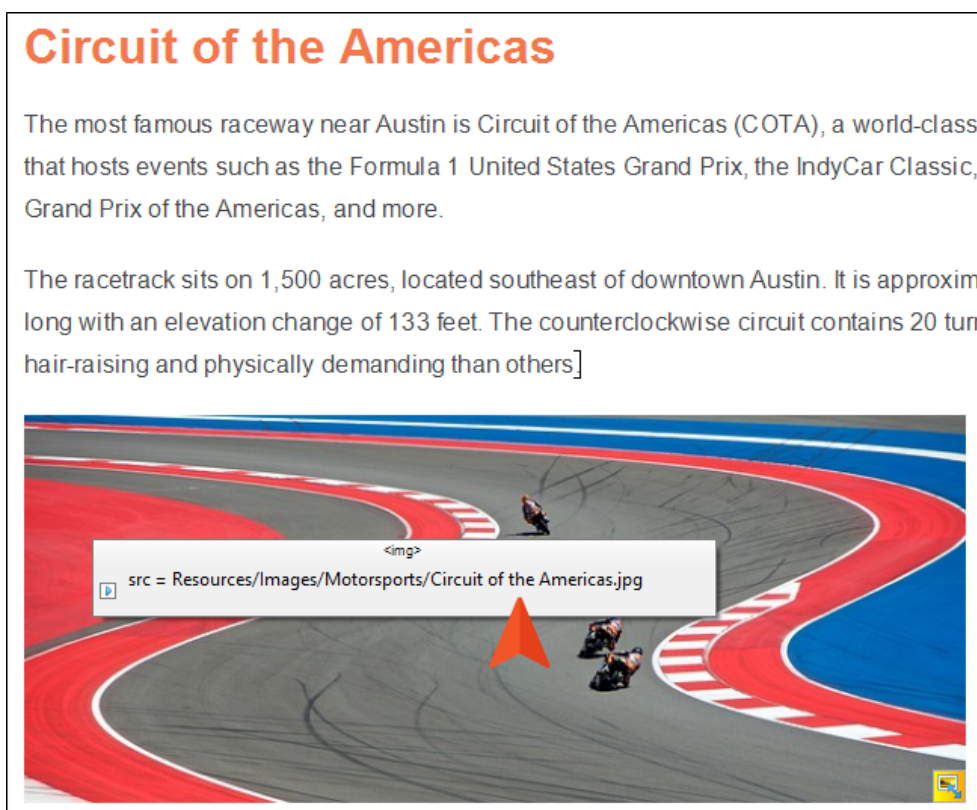
The new topics from the Word import display in the Content Explorer. Even though we started with two Word documents, more topics exist in the Content Explorer because Flare split them up where we told it to. Let's take a look.



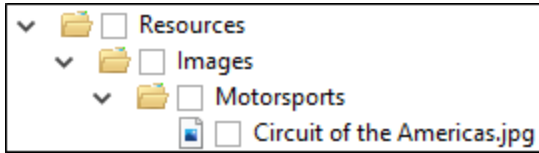
1. Double-click the **Barbecue Hot Spots** topic to open it in the XML Editor. In the original Word doc the heading text had the style of Heading 2. In this tutorial we style mapped it to Flare's h1 style. Also, the custom bulleted list from the Word doc displays as standard bullets.



2. Double-click the **Circuit of the Americas** topic to open it in the XML Editor. Hover over the image and note its name (Circuit of the Americas.jpg).



In the original Word document, the image was embedded rather than inserted as a linked image. Flare automatically named the image based on the topic name and stored it in its own subfolder under Resources > Images. If the image had been linked, its name would have been preserved during the import.



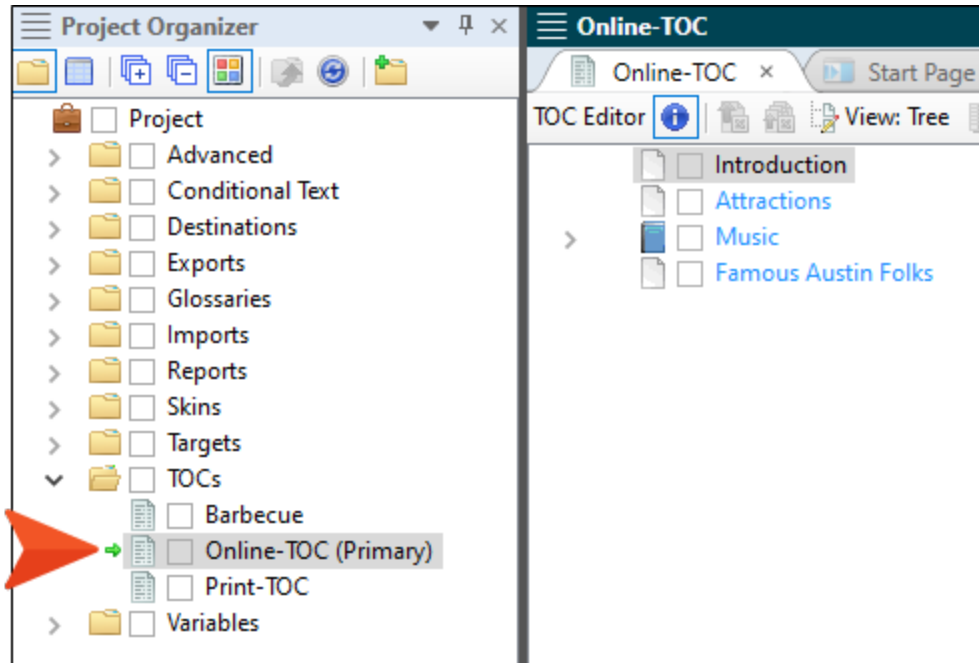
Adding Imported Word Files to a Table of Contents

Up to this point in the tutorial, we have imported the Word files into the project. By way of the Import Microsoft Word Wizard, the Word documents have been converted into topic-based HTML files.

Let's add the new topics about Austin to the project's primary table of contents (TOC).

I How to Add Imported Word Files to a TOC


1. From Flare's Project Organizer, expand the TOCs folder and double-click **Online-TOC (Primary)**.



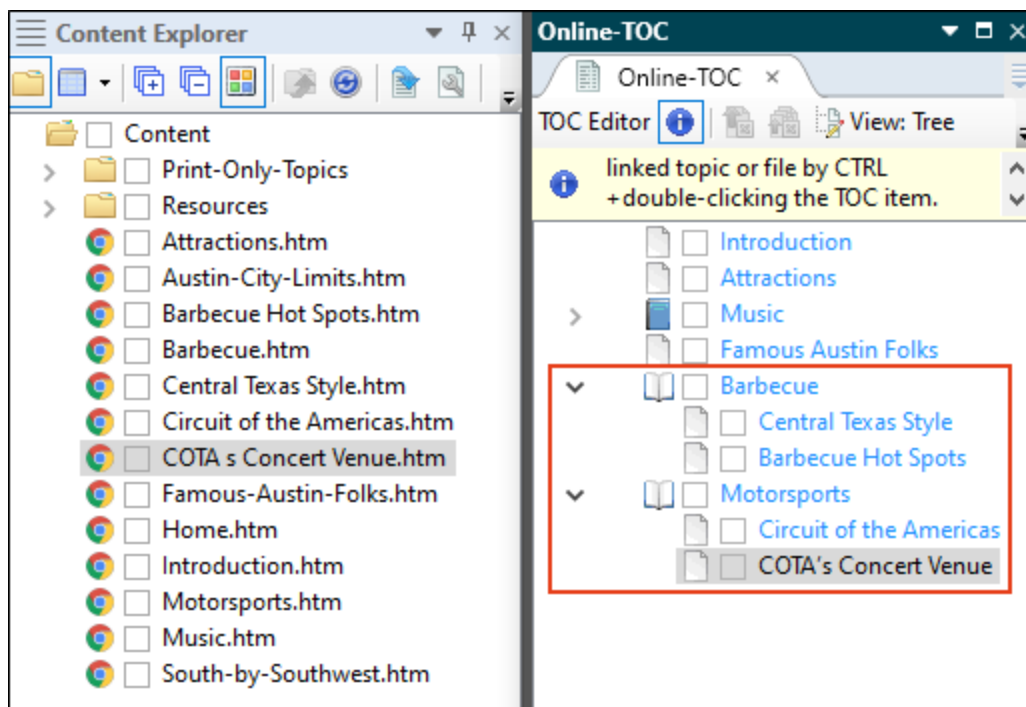
NOTE Primary TOC aside, during a Word import Flare automatically creates a TOC. The name of it is based on the top Word file listed for import in the wizard, but all the HTML files generated are included in the TOC. Notice in the example image above, Flare generated a TOC named "Barbecue." (The TOC name you see might be Motorsports, that's okay. It depends on the order the files were listed at import.) You can double-click the generated TOC file to view its contents.

2. From Flare's Content Explorer, let's drag the newly imported topics and drop them logically into the Online-TOC.
 - Select **Barbecue.htm**, and drop it in the TOC as a new book after the Famous Austin Folks book.
 - Select **Central Texas Style.htm**, and drop it under the Barbecue book.

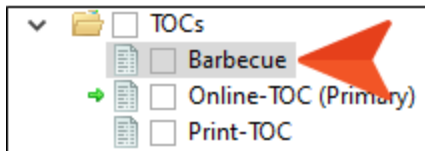
- Select **Barbecue Hot Spots.htm**, and drop it under the Barbecue book at the end.
- Select **Motorsports.htm**, and drop it in the TOC as a new book after Barbecue.
- Select **Circuit of the Americas.htm**, and drop it under the Motorsports book.
- Select **COTA's Concert Venue.htm**, and drop it under the Motorsports book at the end.


 **NOTE** In order to align TOC items correctly you might have to use the TOC arrow keys in the toolbar to move items up, down, to the right, or to the left in the TOC structure.

The Online-TOC should look like this when you are done:



- (Optional) From Flare's Project Organizer, expand the **TOCs** folder. Since this tutorial uses the Online-TOC, you can right-click the auto-generated TOC that Flare created during the import process, and then select **Delete** to remove it from the project. (Your TOC might say "Motorsports" instead of "Barbecue.")



- Click  to save all files.

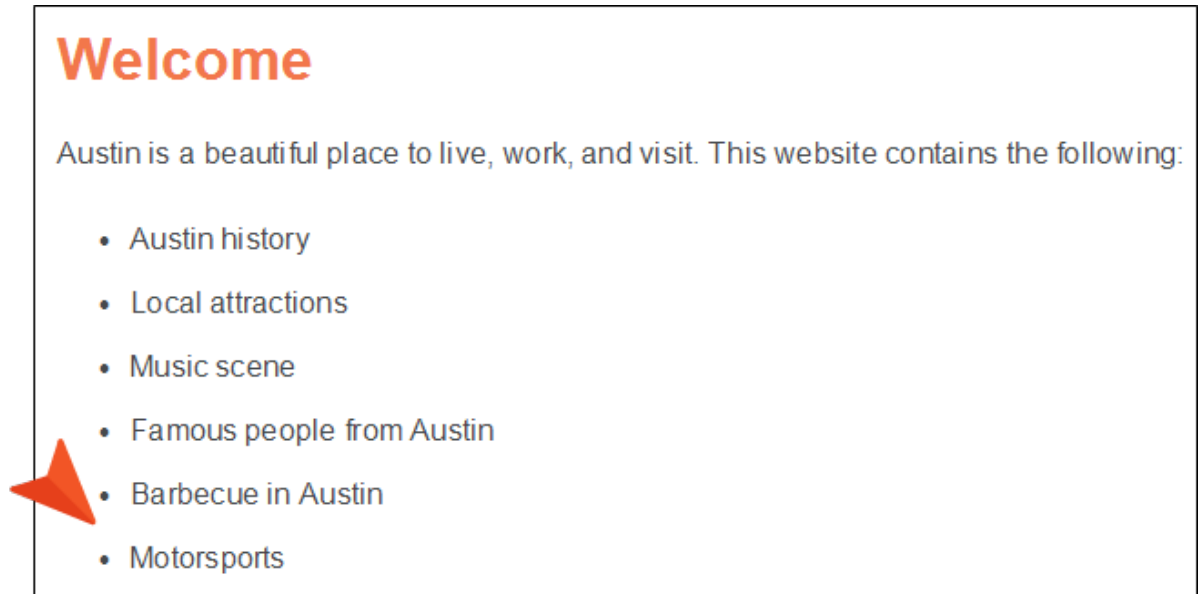
CHAPTER 6


Building HTML5 Output

We are almost ready to build the HTML5 output, but first let's add the new subject matter to the Welcome page.

I How to Build Output

1. From the Content Explorer, double-click the **Home.htm** topic to open it in the XML Editor.
2. Under the Welcome heading, add the new topics to the bulleted list. Under the bulleted item "Famous people from Austin," type `Barbecue in Austin`, and under that item type `Motorsports`.

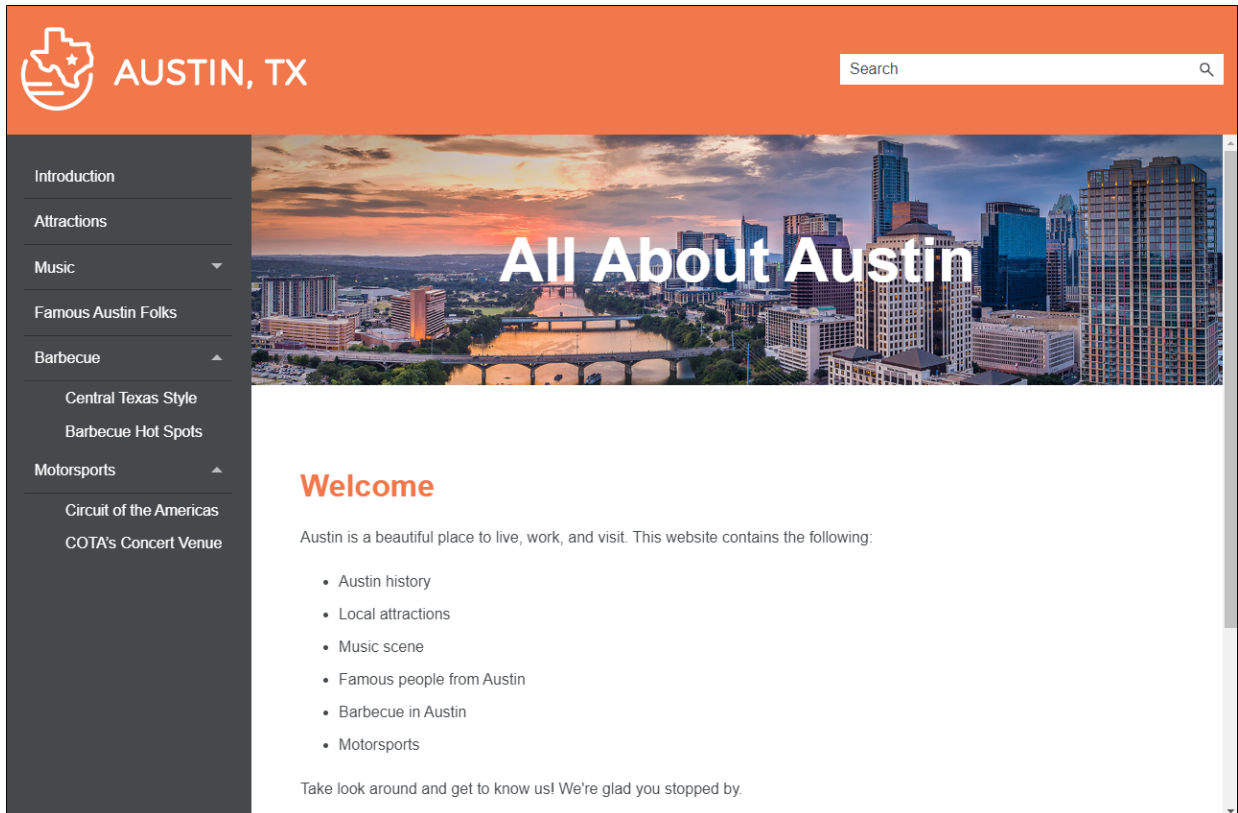


3. Click  to save your work.
4. Now, let's build the project and see how it looks. Select the **Project** ribbon. Then from the **Build Primary** drop-down, select **Build All-About-Austin-HTML5**.

The Builds window pane opens at the bottom of the Flare interface, and the target begins to generate.

When the build finishes successfully, the Build Progress cell turns dark green.

5. Double-click the row to open the HTML5 output and review everything you've done.



APPENDIX

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

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Micro Content Cheat Sheet

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Shortcuts Cheat Sheet

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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*

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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