madcap software

USER GUIDE

MADCAP FLARE DESKTOP 2025

Project Creation

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CHAPTER 1

Starting Projects

The first step in developing a project after you launch Flare Desktop is to start a project.

This chapter discusses the following:

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Creating a Project

Following are the steps for creating a new Flare project using the Start New Project Wizard.

How to Create a Project

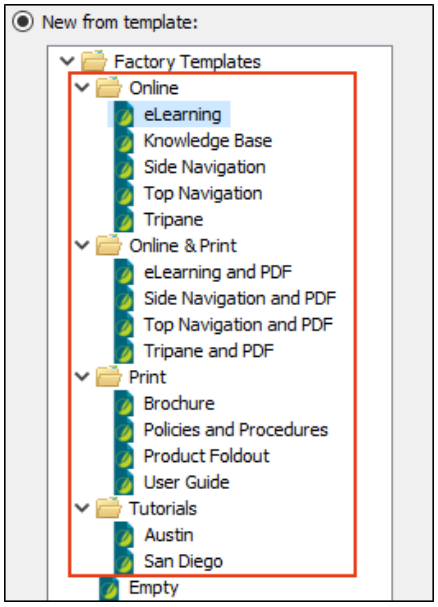
1. On the Start Page click **New Project**. Alternatively, you can select **File > New Project**.
2. Complete the fields on the first page of the wizard and click **Next**.
    - **Project name** Enter a name for the project.
    - **Project folder** Keep the default location for the project, or click to select another.
    - **Language** Select the primary language for the project.
    - (Optional) **Bind to Source Control** Select this if you want to integrate the new Flare project with a source control application (such as Microsoft Team Foundation Server).
3. (Optional) If you selected the "Bind to Source Control" option, click **Bind Project**. In the Bind Project dialog, complete the fields, depending on the source control application being used. When you are finished, click **Next**.
4. Select a template using one of the three options—(1) new from template, (2) new from existing, (3) new from import—and click **Next**.

NEW FROM TEMPLATE

Choose either a factory template file or one of your own custom template files as a starting point. The new file will take on all of the settings contained in the template. If you want to use the factory template provided by Flare Desktop, expand the **Factory Templates** folder and click on a template file. If you want to use your own custom template file, expand the appropriate folder and click on a file. For more information about templates, see the Help system.

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

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



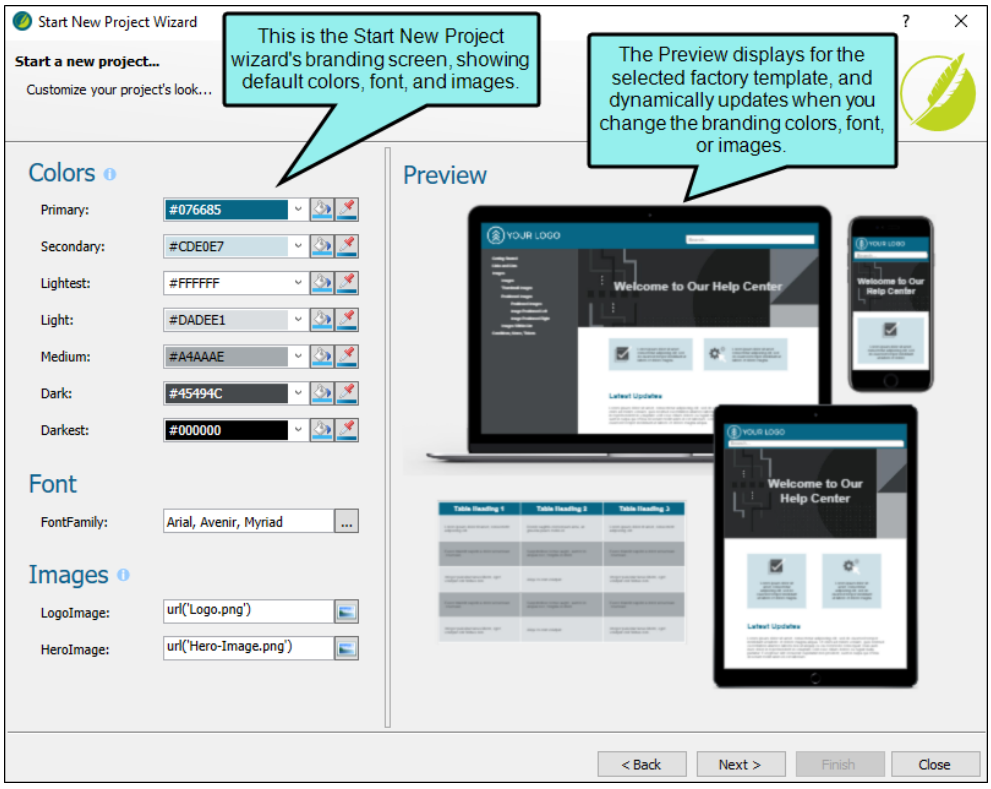
NEW FROM EXISTING

You can use this option if you already have a Flare project that you want to use as the basis for your new project. Click ..., use the Open File dialog to find a Flare project file (FLPRJ), and double-click it.

NEW FROM IMPORT

You can choose legacy files (e.g., Word, Excel, FrameMaker, HTML, DITA, HTML Help, RoboHelp) to import. If you select this option and click **Next**, a list of import options is displayed. You can select the file type, click **Next** again, and complete the options in the new wizard that opens, instead of completing the rest of the Start New Project Wizard.

5. (Optional) Depending on the template selected, choose branding colors, a font family, logo, and hero image to apply to your project. This will give your project a custom look and feel from the start. These options can be changed later in the Branding Editor. Click **Next**.



> NOTE If you use a factory template or a custom preview project template, the branding page displays. If you select files from a New from existing or a New from import source, the branding screen will be bypassed.

> NOTE The field selection for the branding screen in the wizard might change slightly depending on the factory template chosen.

6. Select the primary target for your project and click Finish. The targets listed in the drop-down are limited to the those found in the template you selected.

Importing a Project From Source Control

One way to start a project is to import an existing Flare project from source control. You might use this method, for example, if you are working on a multi-author project and another member of the team has placed the Flare project in source control. For more information and steps, see the Help system.

Importing Word Files

You can import Microsoft Word files into a new project or an existing one.

How to Import Word Documents

The following steps describe how to import Word files using the Import Word Wizard. However, you also have the option of adding a Word import file and then using the Word Import Editor.

1. Select **Project > Import > MS Word Documents**.
2. In the wizard, choose either **Import into a new project** (and complete the fields below) or **Import into this project**. However, if you do not have a project currently open, the file(s) will automatically be imported into a new project.
    - **Project name** Type a name for the new Flare project that will be created after you perform the import.
    - **Project folder** Accept the default location for the new project or click ... to find and select a folder.
    - **Output type** Select the primary target for your project.
3. Click **Add file** to choose Word documents. You can also select other options as necessary.

Option	Description
Remove file	This removes the selected file(s) from the list.
	This moves the selected file or folder lower in the list (if you have more than one to import).

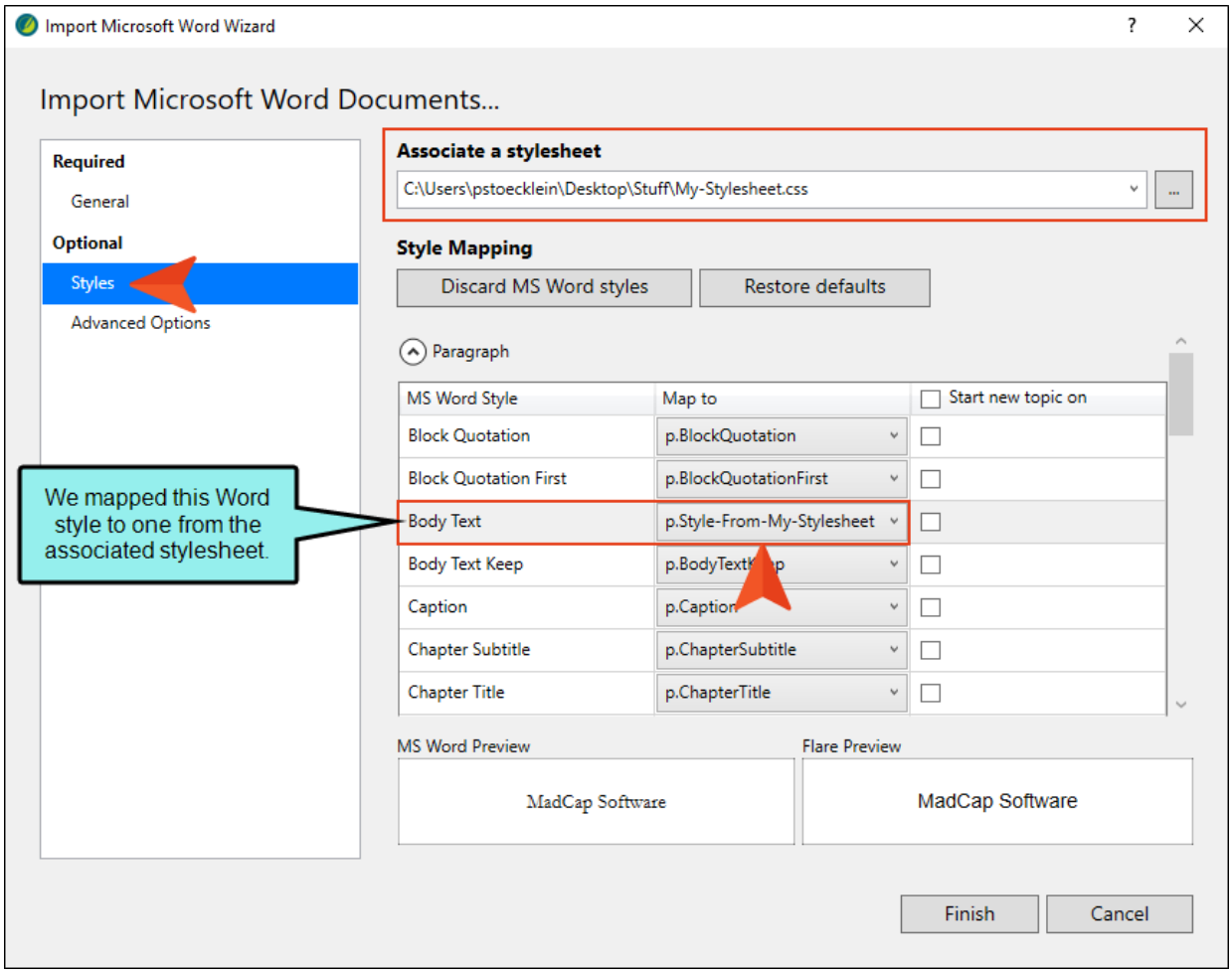
Option	Description
	This moves the selected file or folder higher in the list (if you have more than one to import). The file at the top is used for the name of the Flare TOC that is created as a result of the import. Also, the order determines how the imported files are arranged in the TOC as topics.
	This opens the file that is selected in the list.

NOTE DOCX is Microsoft Word's platform-independent, open XML format. You must have Microsoft Word 2007 or later installed in order to import this file type. You also must have Word installed on your computer, as opposed to using the feature on the Options dialog (**File > Options**) to import without Microsoft Office.

4. (Optional) On the left, select **Styles**. You can use this page for various style settings.

ASSOCIATE A STYLESHEET

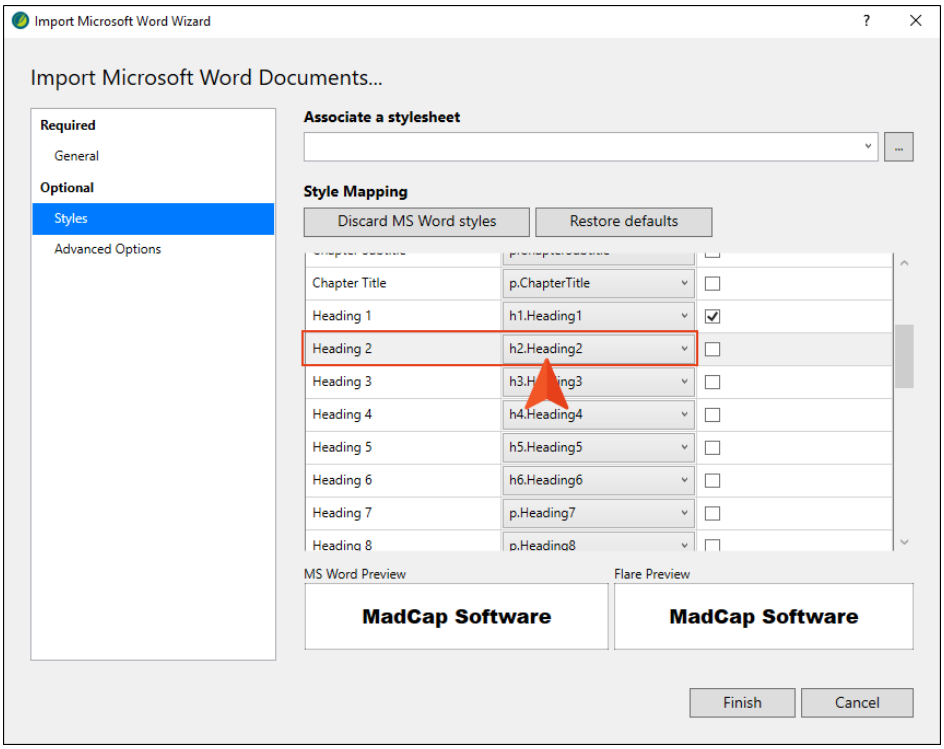
This is purely optional. You can choose an existing stylesheet by clicking ... . After doing this, styles from that stylesheet become available in the mapping drop-down fields below, so that you can map Word styles to those from the stylesheet you chose.



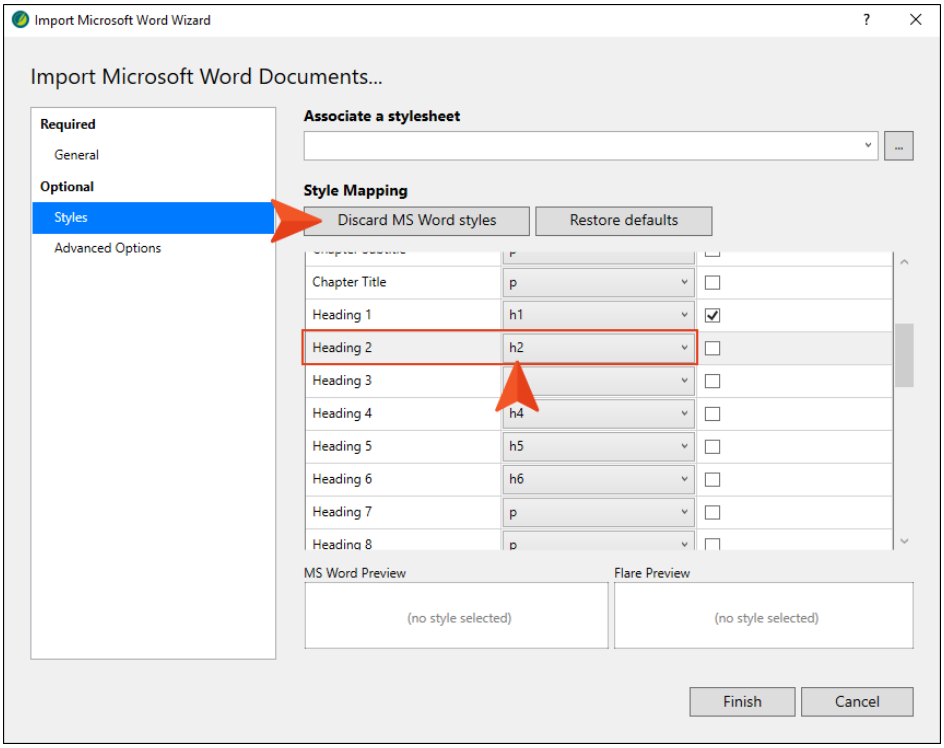
STYLE MAPPING

- **Discard MS Word styles** By default, styles from the Word documents are mapped in such a way that their names are retained and appended to Flare styles. However, you can click this button, which will map to the Flare style but not keep the Word style name or its formatting.
- **Restore defaults** If you change your mind, you can click this button, which will once again retain the Word style names.

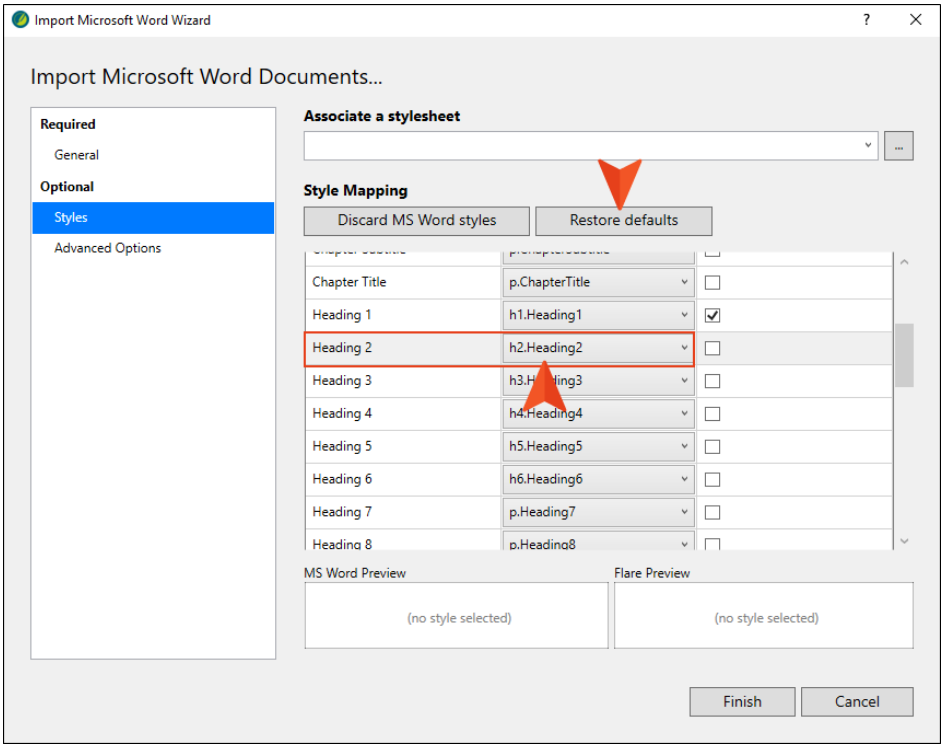
☆ EXAMPLE In your Word document, second-level headings use the "Heading 2" style. But in Flare Desktop, it is named "h2." So when the Word style is mapped to the Flare style, the resulting name will be "h2.Heading2."



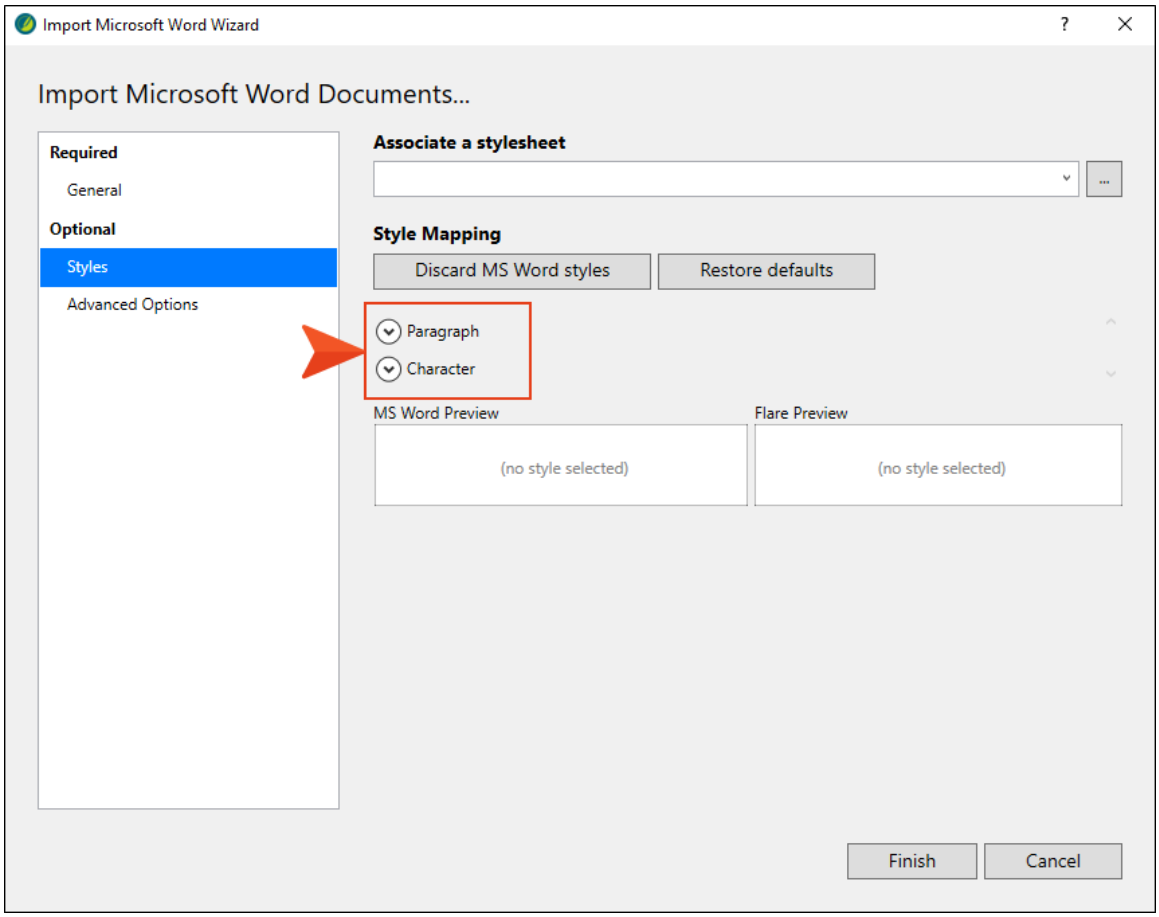
If you click **Discard MS Word styles**, the mapping remains in place, but now the resulting name will be “h2” and any formatting from Word for that style is not retained.



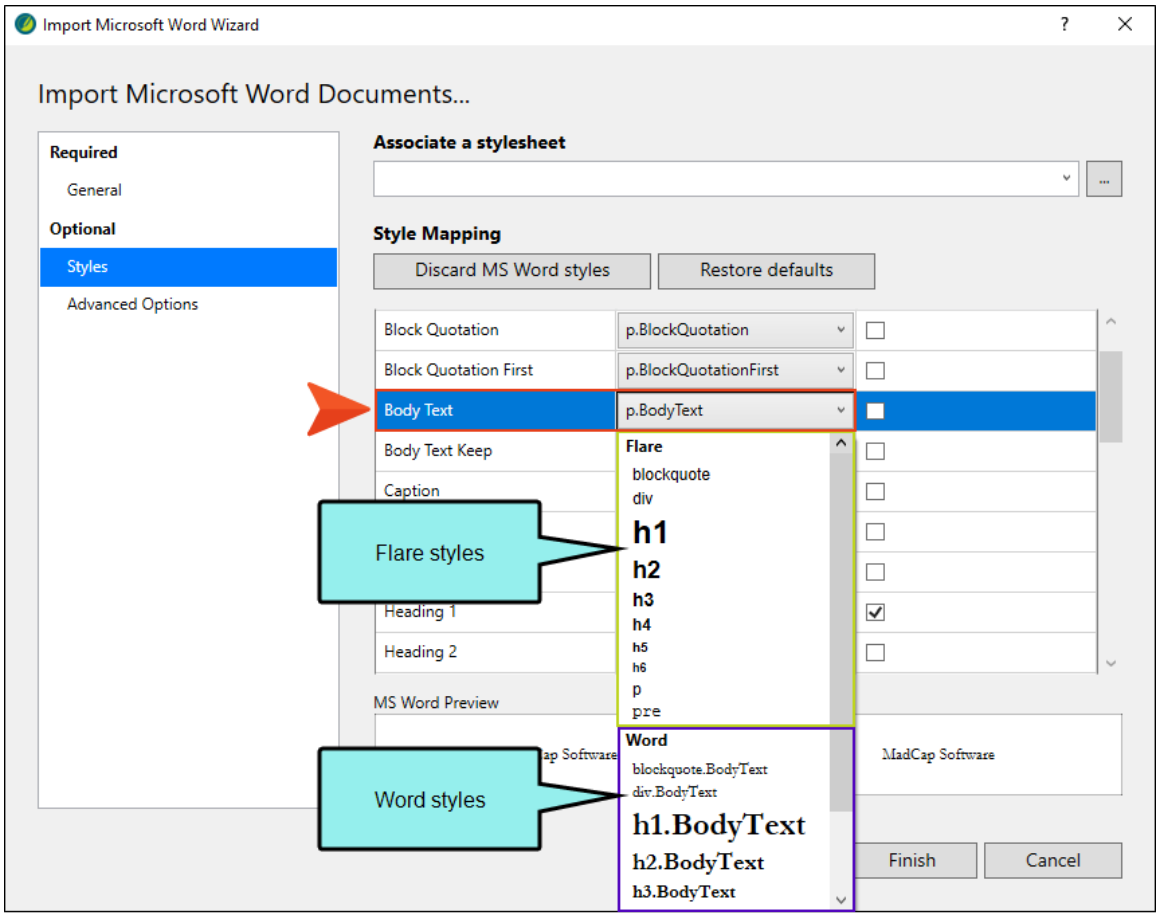
If you click **Restore defaults**, the mapping will once again result in the name "h2.Heading2" and its formatting will be retained.



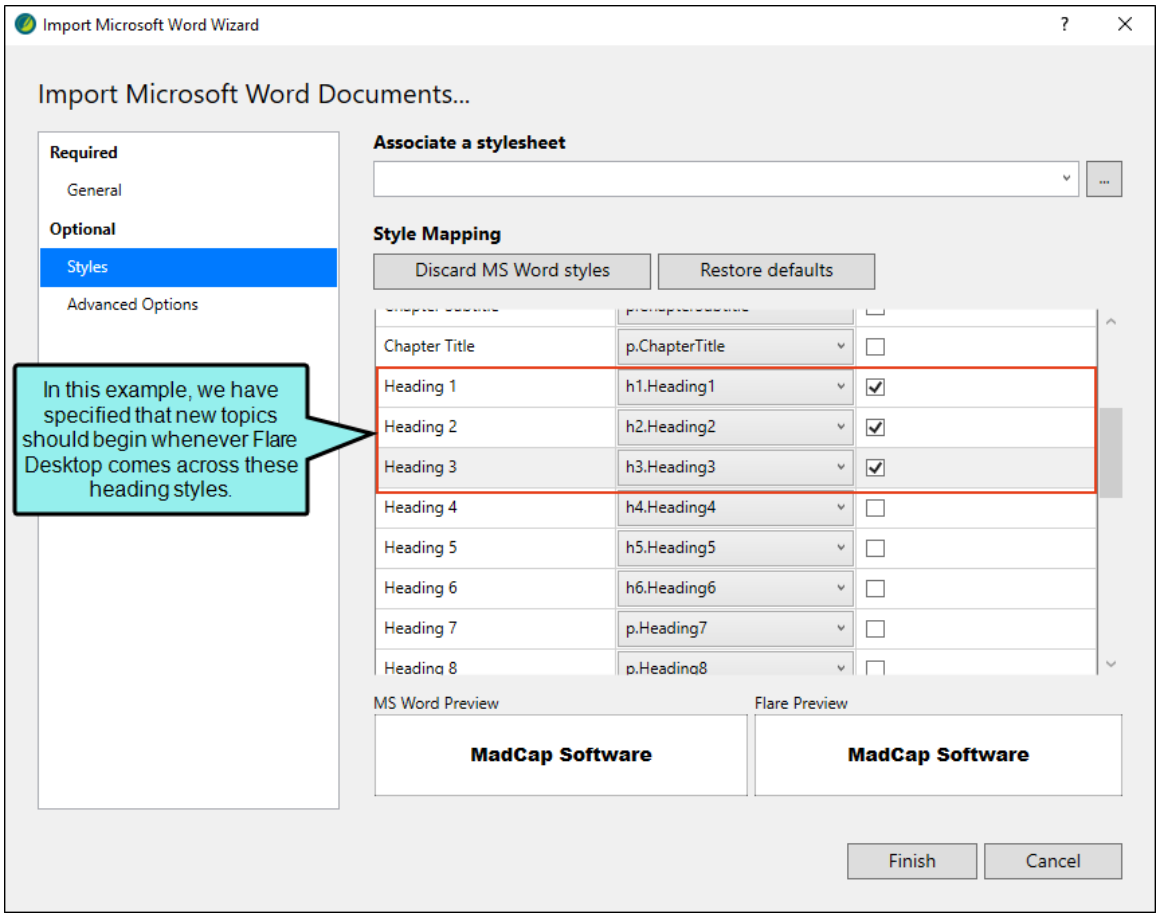
- **Paragraph/Character** You can expand these sections to see the styles found in the Word document(s).



In these sections, you can map a paragraph or character style from the Word document (s) to another style. Click the drop-down in a cell to select a style. Flare styles are listed in the top part of the drop-down menu, while Word styles are listed on the bottom.

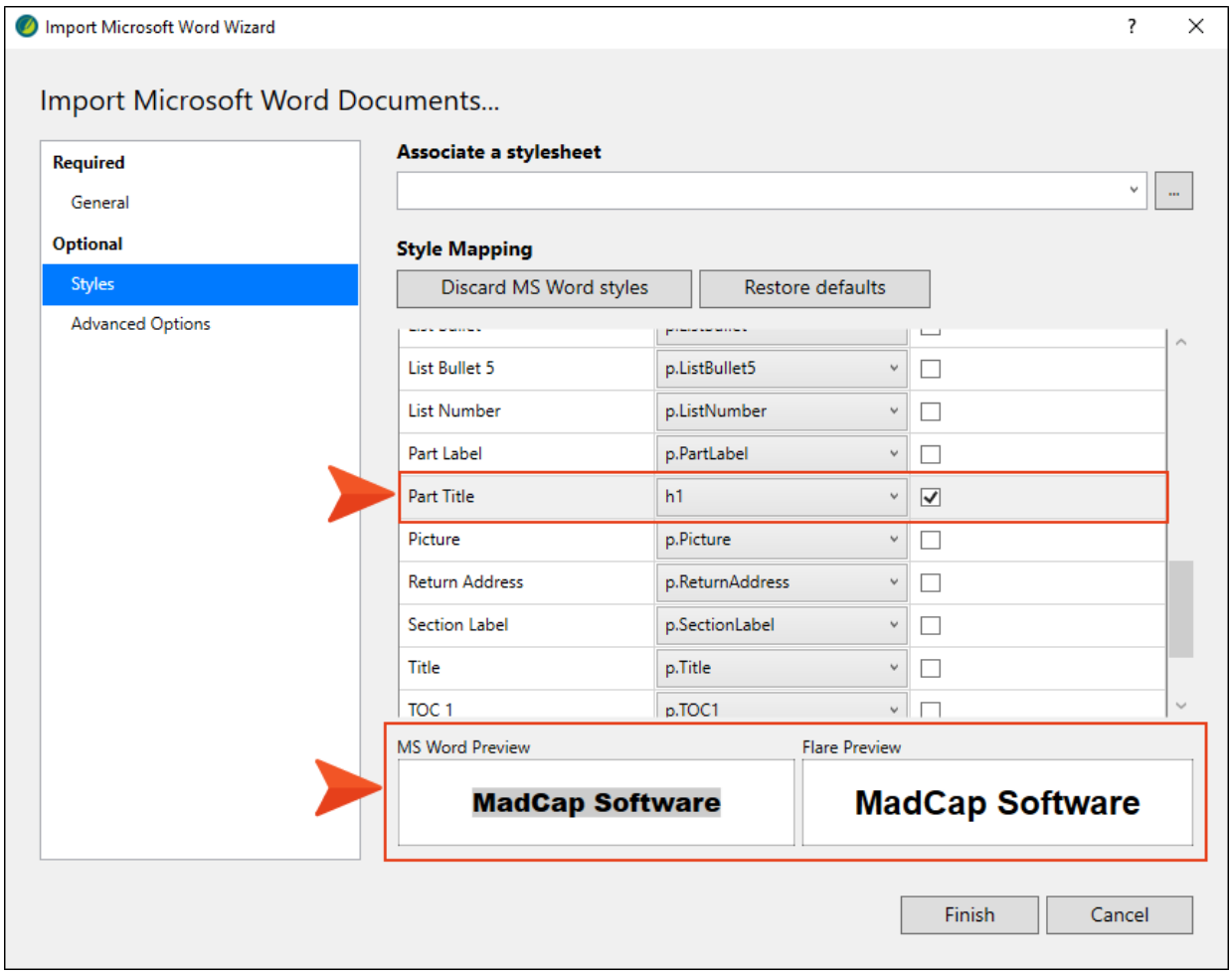


If you want to specify that new topics should start with certain paragraph styles, simply click the check box next to that style. The h1 style is selected by default (most authors start new topics on heading styles), but you can choose any paragraph-level styles that you like.



PREVIEW

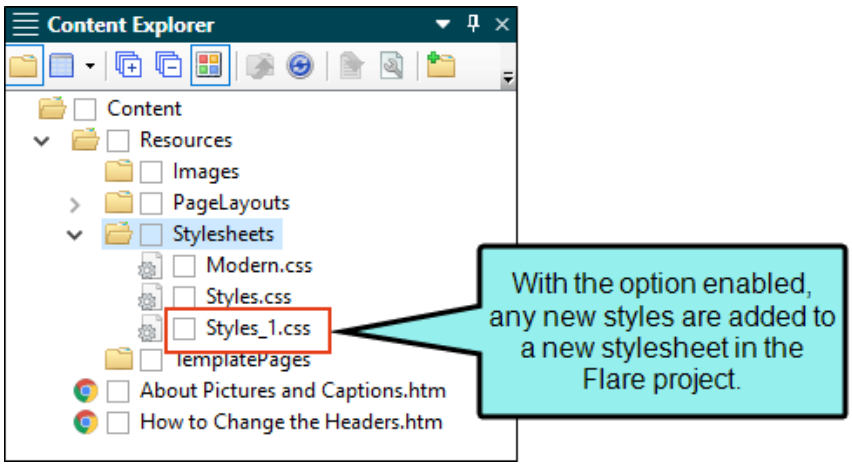
When you select a style row in either the Paragraph or Character section, a preview is shown at the bottom so you can see how it looks. The design of the original Word style is shown on the left, and the look of the mapped style is shown on the right.



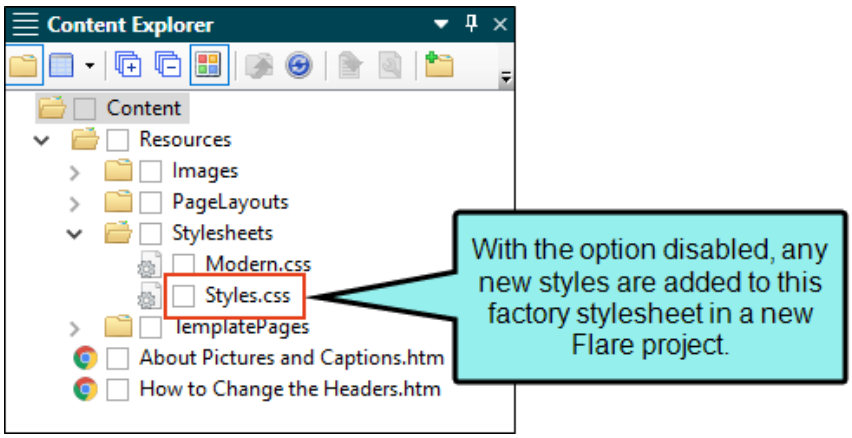
5. (Optional) On the left, select **Advanced Options**. You can use this page to set various options.

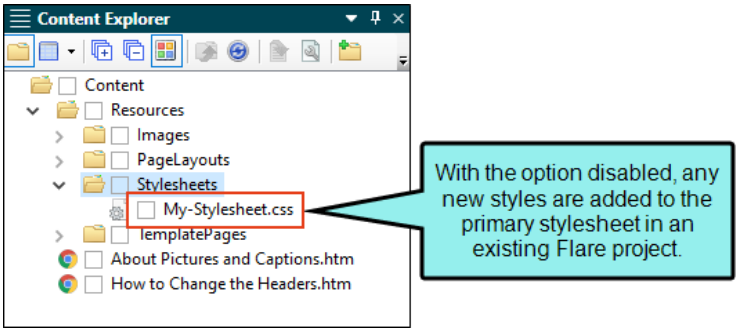
STYLES

- **Create new stylesheet** This creates a new stylesheet based on the settings you choose.



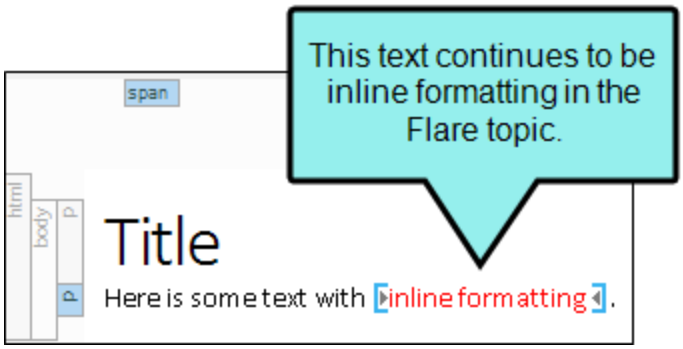
If you disable this option, the styles resulting from the import will be added to the project's primary stylesheet.

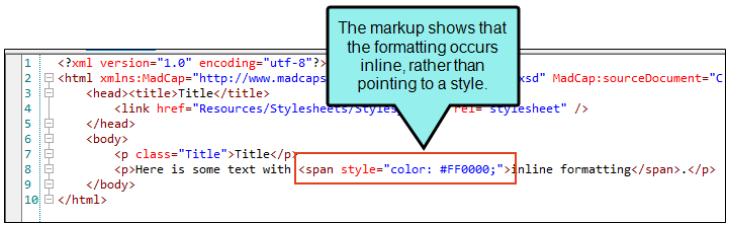




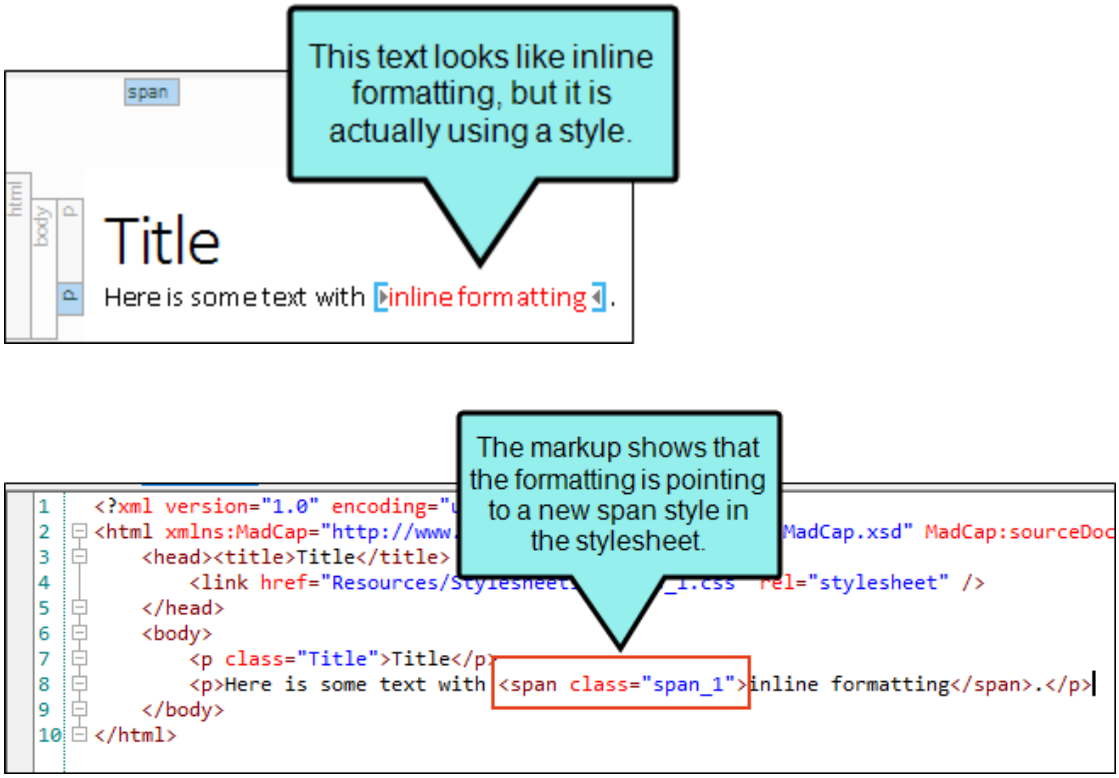
NOTE If you choose to create a stylesheet when importing Word documents into a new project, that stylesheet will be automatically selected in the project properties. If you then open the Word Import Editor, deselect the option to create a new stylesheet, and reimport the documents, that stylesheet will continue to exist in the project.

- [Inline formatting]
  - Keep inline formatting This retains inline formatting found in the Word documents.





- **Convert inline formatting to CSS styles** This converts inline styles found in the Word documents to styles in the Flare project.



- **Remove inline formatting** This removes any inline formatting found in the Word documents, displaying it as regular text instead.

TOPICS

- Automatically set topic title If this option is enabled, the properties setting for the topic title automatically uses the first heading in the topic. Therefore, if you change the heading text in the future, the topic title changes automatically as well. If this option is disabled, the properties setting for the topic title explicitly uses the first topic heading text found during the import, and it remains so unless you manually change it later.
- Avoid empty topics threshold Select this option if you want to ensure that new topics are not created when large sections are found in the Word documents without any content. Enter the maximum number of empty character spaces allowed in a topic. If this number is exceeded, Flare Desktop will not create a new topic from that empty space.
- Split long topics threshold Select this option if you have long sections in your source documents and want to make sure that they are converted to multiple topics (rather than one very long topic). Enter the maximum number of characters to be converted to a topic before a new topic is created. Flare Desktop will break the topic at the nearest paragraph to the threshold value. That way, a new topic will not start in the middle of a sentence or word, but at the beginning of a paragraph.
- Add continued links Select this option to place a "Topic Continued" link at the bottom of pages when a long topic has been split into multiple ones.
- Add continued from links Select this option to place a "Topic Continued From" link at the top of continued pages when a long topic has been split into multiple ones.
    - (continued in/from {title}) Use these fields to specify the format for the "(continued in)" and "(continued from)" links. Flare Desktop provides a cross-reference format for you—(continued in {title}) or (continued from {title}). With this cross-reference format, the link contains the words "continued in" or "continued from" within parentheses, followed by the text of the first paragraph in the connected topic. If you do not want the link to use that particular text, you have a couple of options. First, in Flare Desktop, you could manually enter a heading in each topic that is connected to another topic included in the split. That text will be used in the link instead (after you update the cross-references in Flare Desktop). Another option is to modify the format by clicking the Edit button.
- Approximate filename length Enter the maximum number of characters to use for naming topic files. The default is 24.

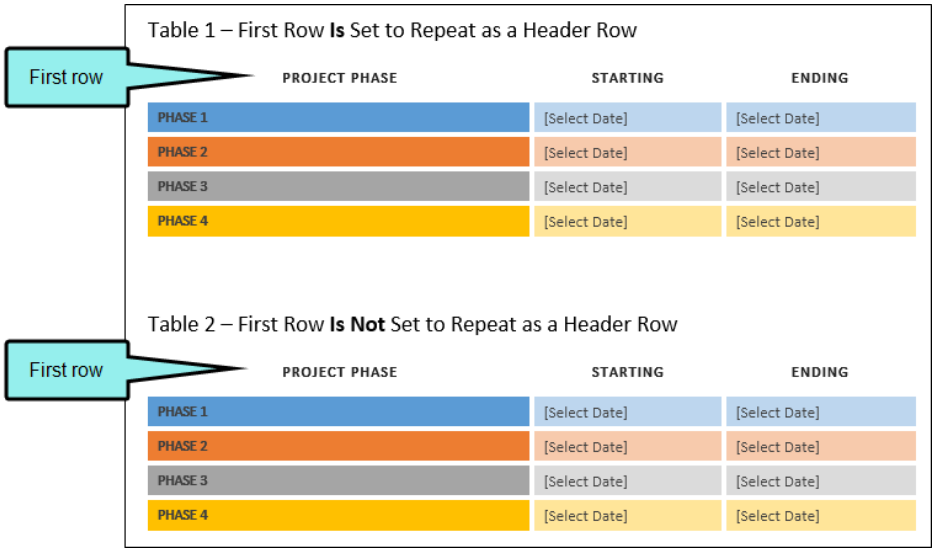
TABLES

- **Convert all tables to "auto-fit to contents"** Select this option if you want to automatically set tables to "Auto-Fit to Contents" when they are imported into Flare Desktop. This ensures that column widths are not specified on the imported tables.
- **Set first row of each table as a header row** Select this option if you want Flare Desktop to convert the first row of every table into a header row. This makes styling tables more efficient. If you do not select this option, only tables that already have header rows in the Word document will become header rows in Flare Desktop. Tables without header rows will be imported just as they are.

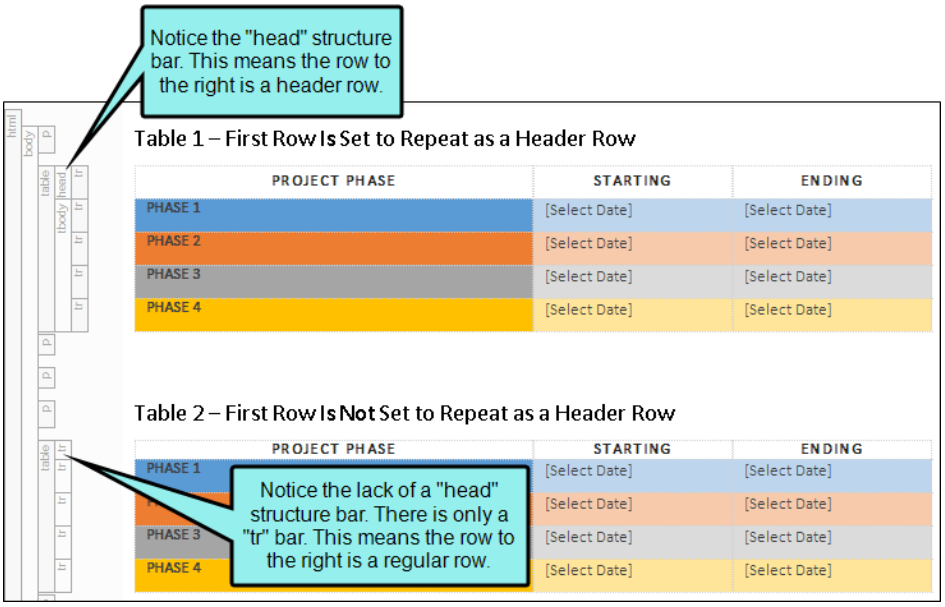
☆ EXAMPLE You have a Word document with two tables.

In the first table, the first row has been set to repeat as a header row.

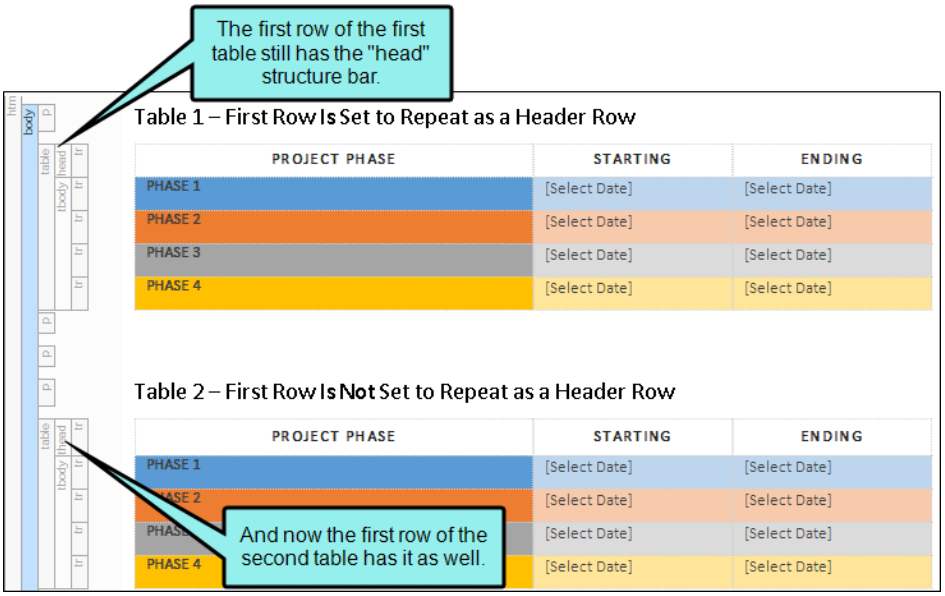
In the second table, the first row has not been set to repeat as a header row.



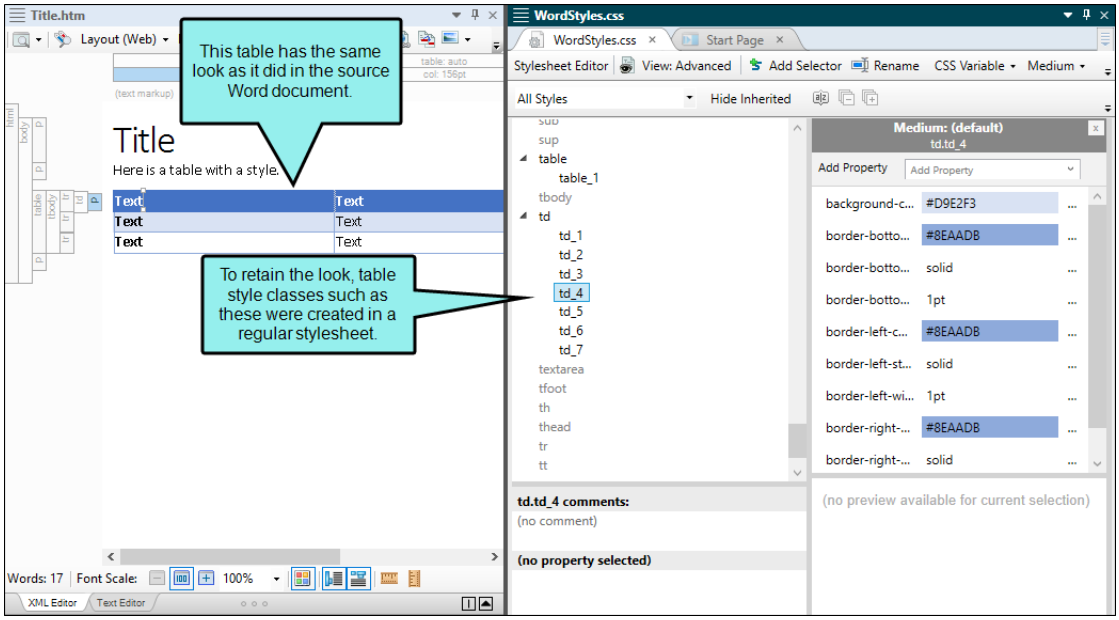
First, you import the Word document but you *do not enable* the option to set the first row of each table as a header row. As a result, the first row in the first table continues to be a header row, just as it was in the Word document. And the first row in the second table continues to be a regular row, just as it was in the Word document.



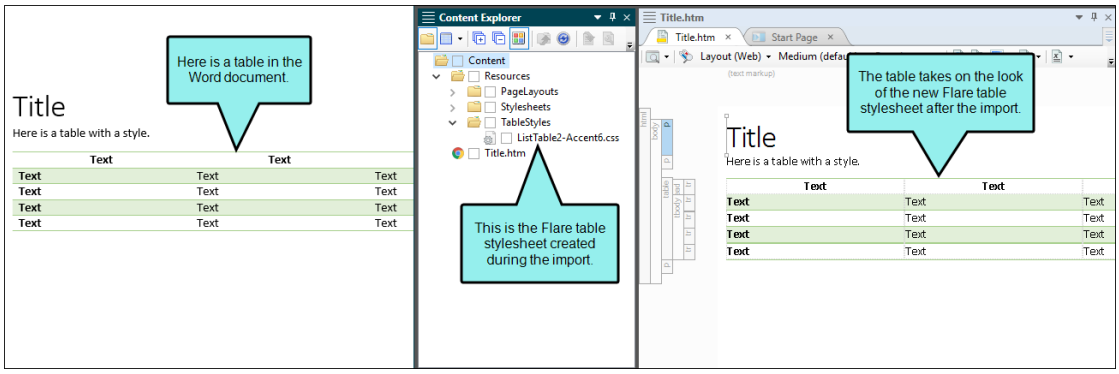
☆ Next, you import the Word document but you *do enable* the option to set the first row of each table as a header row. As a result, the first row of each table is now a header row.



- [Table styles]
  - **Create CSS table styles as regular stylesheet** This finds table formatting in the Word documents and creates styles accordingly in the regular stylesheet in Flare Desktop.

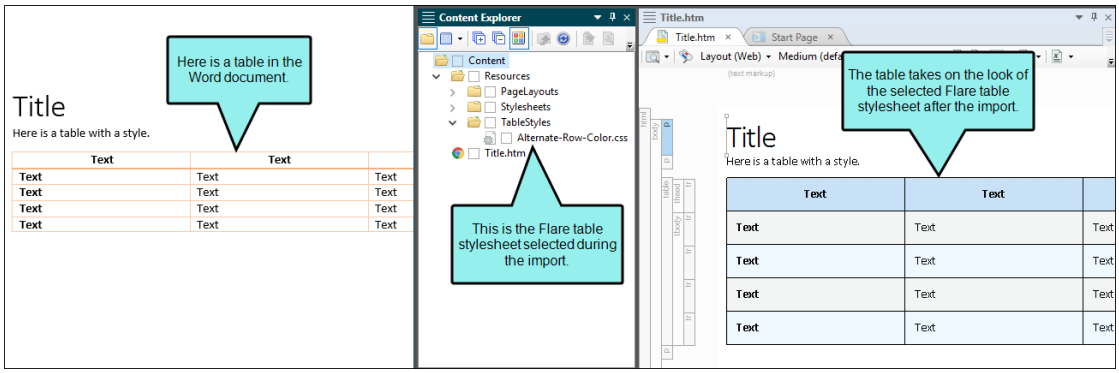


  - **Convert table styles to Flare table styles** This finds table formatting in the Word documents and creates a special table stylesheets accordingly in Flare Desktop.



> NOTE To use this feature, the table must have been created in Microsoft Word 2007 or later. Also, open the Options dialog (**File > Options**), select the **General** tab, and make sure that **Import/Export Word Files without MS Office** is *disabled*.

- **Apply a selected table stylesheet to all imported tables** This lets you select an existing Flare table stylesheet and apply it to all imported tables.



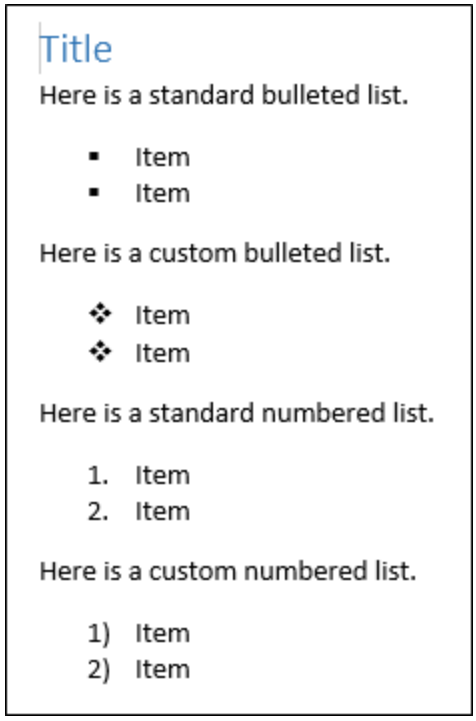
- **Remove all table styles** This removes styling from all tables found in the Word documents. You can keep them as plain tables in Flare Desktop or apply styles to them later.

LISTS

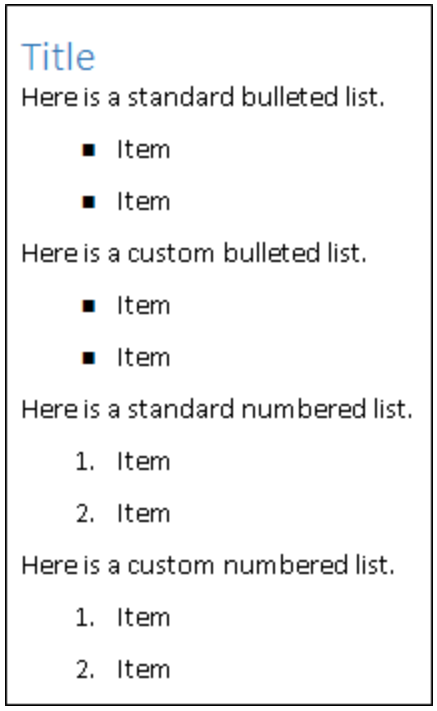
Use standard list style type This will use standard bullets (e.g., square, disc) and numbering (e.g., decimal), whether they were used in the Word documents or not.

If this is not enabled, lists are imported with the characters or symbols used for the lists in the Word documents. However, these are contained within span tags in the Flare topics. This allows you to keep special elements, (e.g., Wingdings) that you might have used in Word for custom lists.

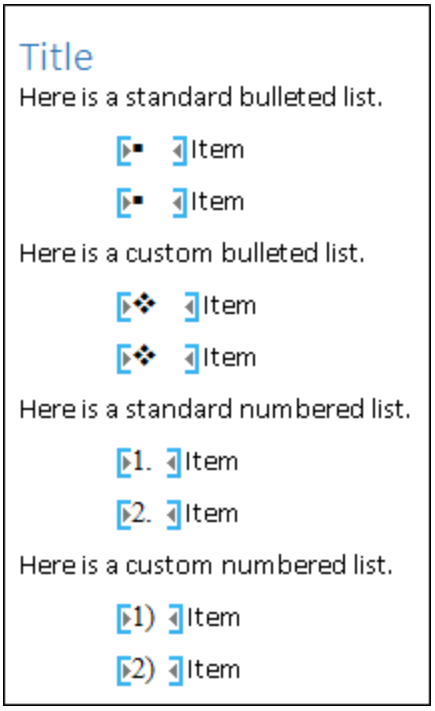
☆ EXAMPLE You have a Word document with lists, and it looks like this:



If the option to use standard list style types is enabled, the topic in Flare Desktop will look like this:



If the option is disabled, the topic will look like this:



EQUATIONS

Convert equations to MathML When importing Microsoft Word files that contain equations, you can convert them from Office Math Markup Language (the format used in Word) to MathML (the web standard and Flare format). If you disable this option, equations from Word are converted to images.

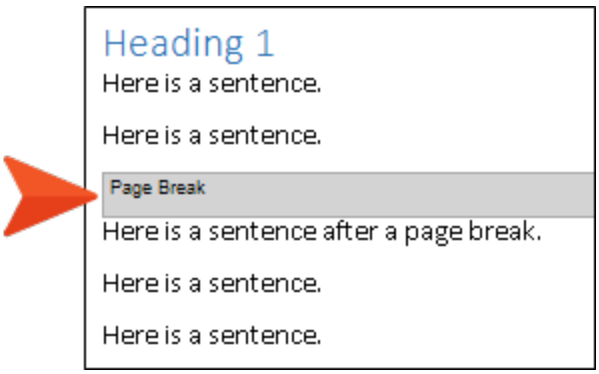
NOTE To use this feature, the equation must have been created in Microsoft Word 2007 or later. Also, open the Options dialog (**File > Options**), select the **General** tab, and make sure that **Import/Export Word Files without MS Office** is *disabled*.

PAGE LAYOUTS

Create a page layout for each section header/footer Select this option if you want Flare Desktop to create new page layouts when you import Word documents that have section breaks, along with headers or footers. For each new section in the Word document that has a different header or footer than the previous section, Flare Desktop creates a unique page layout. After the import is finished, you can open and edit the page layouts if necessary. You can then create chapter breaks for your print-based output and assign these page layouts to the different topics in the output.

PAGE BREAKS

- Preserve and create new topics on page breaks This keeps any page breaks found in the Word documents.
- Preserve and convert to MadCap page breaks This keeps any page breaks found in the Word documents, but it will convert them to the special page break tags (MadCap|pageBreak) used by Flare Desktop. This page break element displays as a gray bar in the XML Editor, but it is not shown in the output; a page break simply occurs at that spot.



- Ignore page breaks This will not keep any page breaks found in the Word documents.

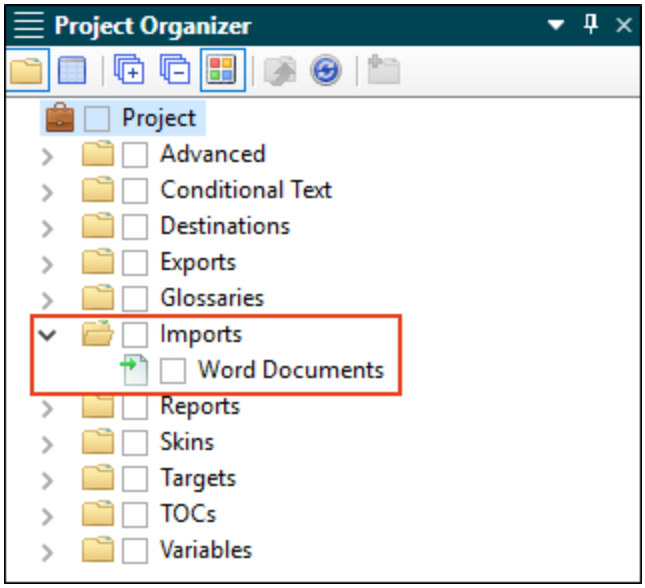
REIMPORT

- Link generated files to source files Enable this if you want to continue editing in Word and reimport as needed. Deselect it if you want to edit the imported files in Flare Desktop going forward, severing the connection to the source files.
- Auto-reimport before generate output If you selected "Link generated files to source files," you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can use this option instead and let Flare Desktop reimport the files automatically when you attempt to build output.

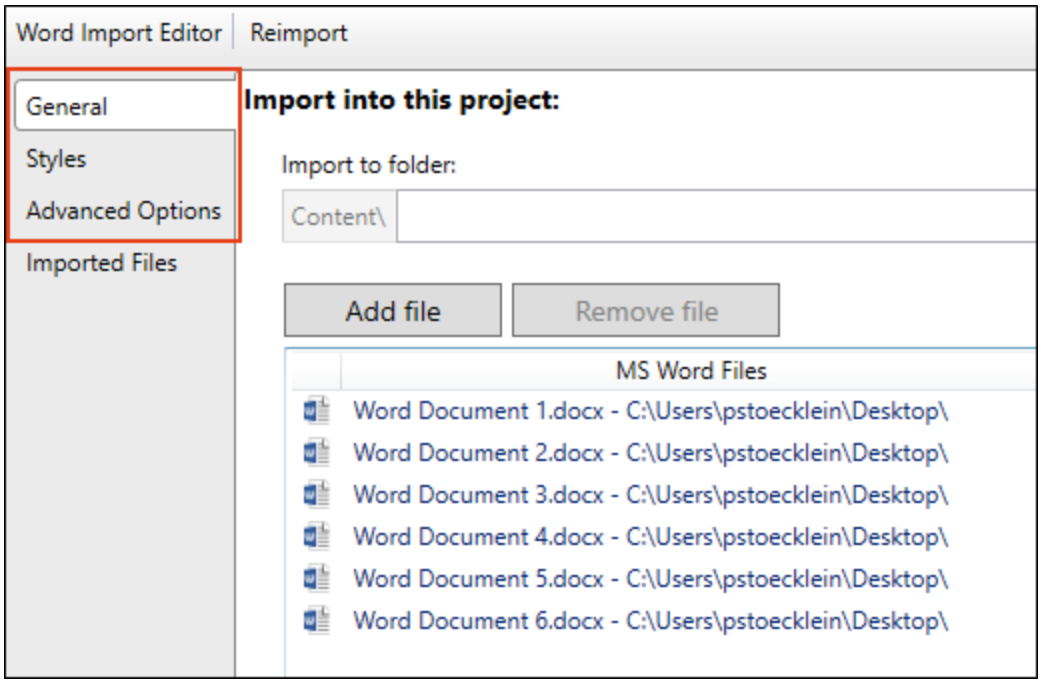
6. Click Finish, then Accept.

Word Import Editor—Import and Re-Import

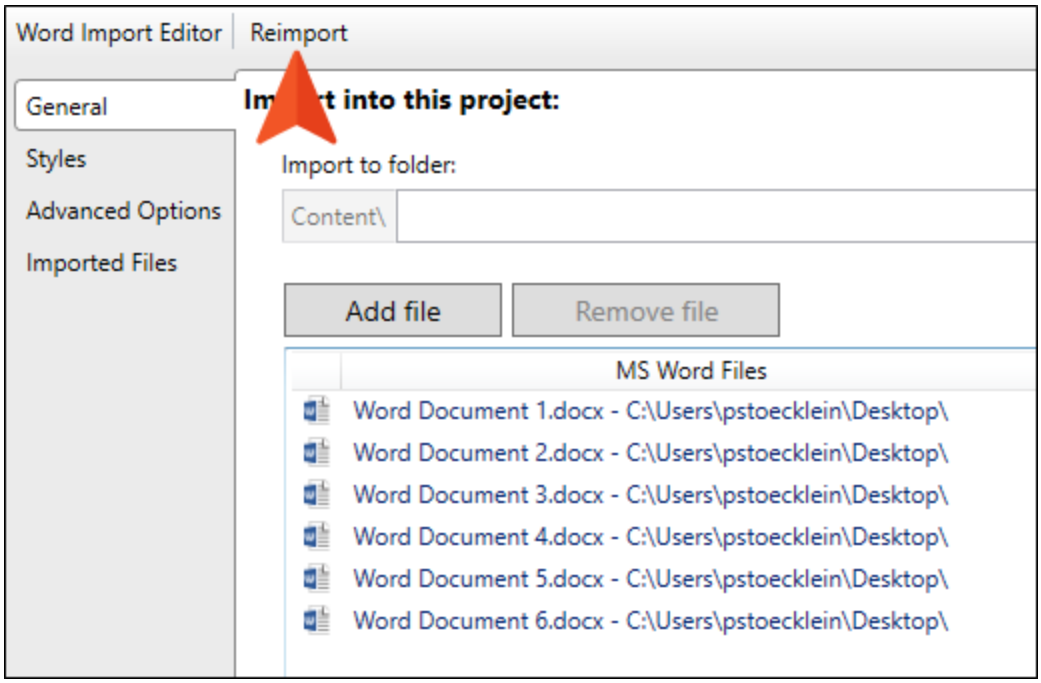
If you add a Word import file or if you have previously imported Word files using the wizard, a file is added to the Imports folder in the Project Organizer.



When you double-click this file, it opens in the Word Import Editor. This editor contains most of the same fields and options as the Import Word Wizard.



After completing or changing any of these fields, you can click **Reimport** in the toolbar.



How Word Features are Treated When Imported

The following table shows some Word features how what happens to them when you import documents into Flare Desktop.

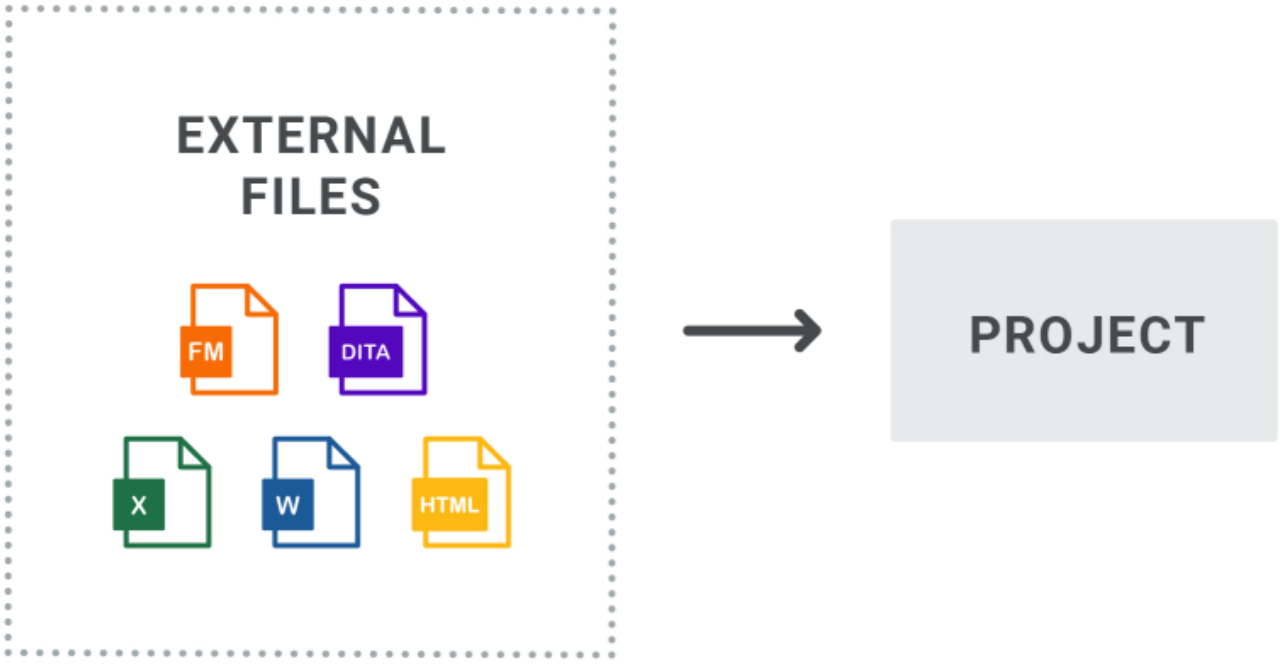
Word Feature	Result After Import
Artwork and Special Effects	If you apply certain special effects or artwork (e.g., arrows) to images in Word and then import them into Flare Desktop, those effects will not be retained. For example, a rotated image will return to its straight, original state. However, there are some workarounds that may allow you to keep the effects or artwork. One solution is to apply another effect such as a shadow or 3-D to the image in Word (e.g., add a shadow to a rotated image that you want to keep). This forces Word to save the image as an entirely new image with the effects. Another possible solution is to save the Word document as a web page, manually copy that HTM file into the Flare folder, and then open it within Flare Desktop. As for text floating around images, this effect is not supported in Flare Desktop. When you import from Word, the text is added below the image.
File Names	Image file names are treated in the following ways for linked and embedded images: ■ Linked Images If you have inserted a picture as a *linked* image in a Word document, the file name for the image is *preserved* when imported into Flare Desktop. The image file is stored by default at the root of the Resources > Images subfolder in the Content Explorer. ■ Embedded Images If you have inserted a picture as an *embedded* image in a Word document, the file name for the image is *based on the topic name* when imported into Flare Desktop. The image file is stored by default in the Resources > Images > [Word Document Name] subfolder in the Content Explorer.

Word Feature	Result After Import
Image Alt Text and Description	If you have an image in a Word document that contains alt text or a description, both are brought in to Flare Desktop. After the Word document is imported, you can open the topic containing the image, right-click on the image, and select **Image Properties**. In the Image Properties dialog, the description for the image is shown in the Screen Tip field, and the alt text is shown in the Alternate Text field.
Linked Images	When you insert an image in Word, one of the options is to insert it as a linked image. NOTE If you received a Word document with linked images from another person—rather than creating the document yourself—you need to also get the images themselves from that individual. Then you need to re-link the images in the document. Otherwise, Word (and therefore also Flare Desktop) will not be able to find them.
Videos	If you import a Word document that contains a direct link to a video, it is brought into the Flare project. This only works for direct video links. For example, if you have Word 2013, you can look for and insert videos from Bing or YouTube. These are direct link videos that are supported. But those from video embed codes are not supported.

NOTE Flare Desktop supports Microsoft Word 2003 and newer versions.

Importing Excel Files

You can import Microsoft Excel files into Flare projects. They can be imported into existing projects or when creating a new project. The spreadsheet content will be added to tables in Flare Desktop when the import is finished.



How to Import Excel Files

1. Select Project > Import > MS Excel Workbooks.
2. In the wizard, choose either Import into a new project (and complete the fields below) or Import into this project. However, if you do not have a project currently open, the file(s) will automatically be imported into a new project.
    - Project name Type a name for the new Flare project that will be created after you perform the import.
    - Project folder Accept the default location for the new project or click ... to find and select a folder.
    - Output type Select the primary target for your project.
3. Click Next.
4. Click to choose Excel files. You can select XLS, XLSX, or CSV files. When finished, click Next. (You can also select other options as necessary.)

Option	Description
	This opens the file that is selected in the list.
Link Generated Files to Source Files	This creates a connection between the original files and the files that are created as a result of the import. This is useful if you want to continue editing the content outside of Flare Desktop, instead of editing in the Flare project. Flare Desktop recognizes when changes have been made to the source documents and reminds you to reimport the documents to ensure the Flare project also reflects the changes. If you use this option, a link icon is added to the top of a linked file in the Flare Desktop interface. This lets you know that you need to edit the source file, rather than editing this file. If you remove the connection to the source file, this icon no longer displays on the file. Please note that if you have bound the project to source control, the icons used for source control take precedence over the link icon.
	This removes the selected file(s) from the list.
	This moves the selected file higher in the list (if you have more than one file to import). The file at the top is used for the name of the content folder holding the imported topics in Flare Desktop. Also, the order determines how the imported files are arranged in the Flare TOC that is created as a result.
	This moves the selected file lower in the list (if you have more than one file to import).

5. Select from various options as necessary, then click Next.

   - Import Worksheets as Select the type of Flare file where you want your spreadsheets to be imported.

     - Topics Flare Desktop will convert your content and place worksheets into topics. Title text on a worksheet tab will become a heading in the Flare topic.
     - Snippets Flare Desktop will convert your content and place each worksheet into a separate snippet.

     If you selected "Snippets" above, you can also choose from the following options:

     - Include tab titles as headings Any title text on your worksheet tabs will become headings in the Flare snippets.
     - Create a topic with snippets Flare Desktop will create a topic and place the snippets within it. Otherwise, only the snippets will be created.

   - Organize worksheets into different folders per workbook Select this option if you are importing multiple workbooks and want the resulting files to be stored in separate folders in Flare Desktop. If you do not select this option when importing multiple workbooks, the files will all be placed in the same folder in Flare Desktop.
   - Import hidden rows/columns This includes any hidden rows and columns in the import. Otherwise, they will not be part of the imported content.
   - Use first row as column header Select this option if you want Flare Desktop to convert the first row of every spreadsheet into column headers in the Flare tables. If you do not select this option, the first row will be treated like all the other rows.

- Import equations based on settings When importing Excel files that contain equations, you can select this option to convert them to MathML (the web standard) or images. If you disable this option, equations from Excel are not converted to Flare Desktop.

  NOTE The conversion of equations to MathML versus images depends on whether you have Excel installed:

  - If Excel is Installed Equations will be imported as MathML.
  - If Excel is not Installed Equations will be imported as PNG images.

  NOTE There is an option in Excel that must be enabled in order for equations to be imported into Flare Desktop. In Excel, select an equation that you've inserted, open the Design ribbon, and in the Tools section, click the small option in the lower-right. Then in the dialog, select Copy MathML to the clipboard as plain text.

  NOTE If you choose to convert equations to MathML, they are automatically stored in snippets in Flare Desktop. Otherwise, equations will be converted to images. A snippet or image displaying an equation is automatically placed below the worksheet (in the topic or snippet where the worksheet was converted to a table).

  NOTE To use this feature, the equation must have been created in Microsoft Excel 2010 or newer.

- Import charts as Any charts in your spreadsheets will be imported as images. Use this field to select the type of image format to be used.

  NOTE An image displaying an imported chart is automatically placed below the worksheet (in the topic or snippet where the worksheet was converted to a

table).

- Split topics or snippets by maximum rows You can select this option if you have spreadsheets with a lot of rows and want to divide them into multiple topics or snippets (rather than one very long topic or snippet). After enabling this option, enter the number of rows that you want to allow in each topic or snippet before a new topic or snippet is created.
- Auto-reimport before 'Generate Output' If you selected “Link Generated Files to Source Files” earlier in the wizard, you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can also tell Flare Desktop to do this for you automatically, so that you do not have to. Select this option if you want Flare Desktop to automatically reimport files when you attempt to build output.

6. Use the next page to specify how you want the formatting of the Excel files to be treated upon import. Choose whether the imported files should retain their look and feel from Excel, or if you want to associate them with a table stylesheet that you’ve already created in Flare Desktop. When finished, click Next.
   - Preserve MS Excel Styles This retains any formatting from your spreadsheets so that you can continue to use that look and feel in Flare Desktop.

     If you have Excel installed, all styles (factory and custom) and local formatting are retained in Flare Desktop. If you do not have Excel installed, only custom styles and local formatting are preserved; factory styles are not retained. Also, if you are using more than one table style in a worksheet, only one of them will be retained in Flare Desktop.
   - Don't Preserve MS Excel Styles This does not keep the formatting used in the Excel spreadsheets. You can click in the field below this if you want to associate the imported spreadsheets with a table stylesheet that you’ve already created in Flare Desktop. If you do not choose a table stylesheet, the files will be imported with plain text.
7. You can use this page to exclude certain worksheets, or even specific rows and columns, from the import. By default, all workbooks, worksheets, rows, and columns are selected for import. You can click the corresponding check boxes to remove check marks, which excludes items from the import. If you click on a particular worksheet, the area to the right displays the

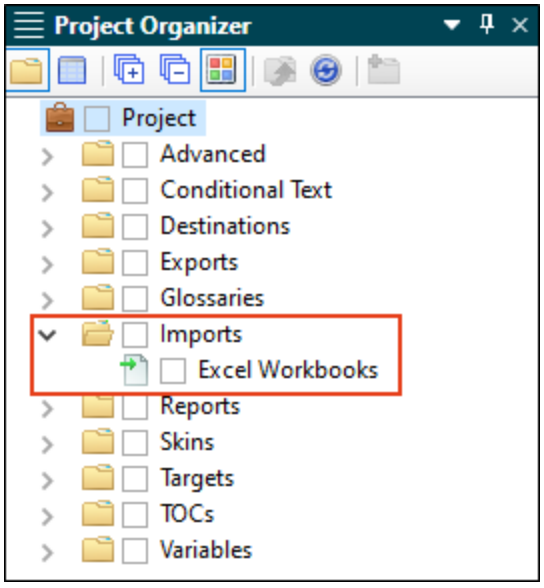
rows and columns within it. You can then remove check marks for any rows or columns that you want to exclude.

> NOTE If your worksheets have any hidden rows or columns that you did not include in the import, you may see that those rows or columns are skipped on this page. For example, you might see columns A, B, C, and E (where D is hidden).

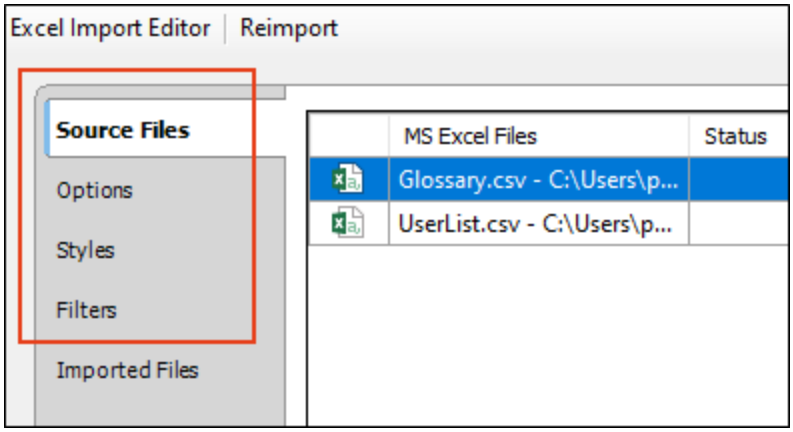
8. Click Finish. The Accept Imported Documents dialog opens. The files that will be created as a result of the import are listed on the left. A preview of each file can be seen to the right when you click the file.
9. When you are finished previewing the files to be created, click Accept.

Excel Import Editor—Import and Re-Import

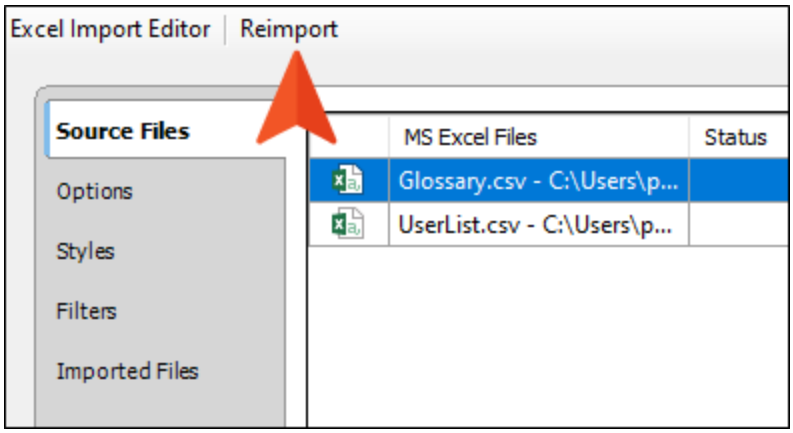
If you add an Excel import file or if you have previously imported Excel files using the wizard, a file is added to the Imports folder in the Project Organizer.



When you double-click this file, it opens in the Excel Import Editor. This editor contains most of the same fields and options as the Import Microsoft Excel Wizard.



After completing or changing any of these fields, you can click **Reimport** in the toolbar.



What's Noteworthy?

NOTE There is a limit of 256 columns per worksheet that can be imported from Excel into Flare Desktop.

NOTE Flare Desktop supports Microsoft Excel 2010 and newer versions. However, if you have an older version of Excel, you can open the Options dialog (**File > Options**), select the **General** tab, and choose **Import Excel Files Without MS Office**.

NOTE A link icon displays on tabs in the XML Editor next to file names that are imported from and linked to another file or Flare project. However, if you are also using the built-in source control technology, the source control icons have a higher precedence and will therefore be displayed instead.

Importing HTML Files

You can import XHTML and HTML files (automatically converting them to XHTML).

How to Import HTML Files

1. Select **Project > Import > HTML File Set**.
2. In the wizard, choose either **Import into a new project** (and complete the fields below) or **Import into this project**. However, if you do not have a project currently open, the file(s) will automatically be imported into a new project.
    - **Project name** Type a name for the new Flare project that will be created after you perform the import.
    - **Project folder** Accept the default location for the new project or click to find and select a folder.
    - **Output type** Select the primary target for your project.
3. Click **Next**.
4. Click to choose HTML files. You can also click to find and select a folder containing HTML files you want to import. When you select a folder to import, the wizard imports all files within that folder that have an .htm, .html, or .xhtml extension. If you later reimport HTML files into the project, Flare Desktop checks to see if any of the files in the source folder have changed. It also determines whether files have been deleted or added, and it updates the source files list accordingly. When you are finished, click Open.

5. (Optional) You can use the other options on the page if necessary.

Option	Description
	This opens the file that is selected in the list.
	This opens the HTML to XHTML Conversion dialog, which lets you see how the selected file looks in HTML and how it will look after its conversion to XHTML.
Link Generated Files to Source Files	This creates a connection between the original files and the files that are created as a result of the import. This is useful if you want to continue editing the content outside of Flare Desktop, instead of editing in the Flare project. Flare Desktop recognizes when changes have been made to the source documents and reminds you to reimport the documents to ensure the Flare project also reflects the changes. If you use this option, a link icon is added to the top of a linked file in the Flare Desktop interface. This lets you know that you need to edit the source file, rather than editing this file. If you remove the connection to the source file, this icon no longer displays on the file. Please note that if you have bound the project to source control, the icons used for source control take precedence over the link icon.
	This removes the selected file(s) from the list.
	This moves the selected file higher in the list (if you have more than one file to import). The file at the top is used for the name of the content folder holding the imported topics in Flare Desktop. Also, the order determines how the imported files are arranged in the Flare TOC that is created as a result.
	This moves the selected file lower in the list (if you have more than one file to import).

6. Click **Next**.

7. (Optional) You can use more import options as necessary.
    - Import linked HTML files Select this option if you want to automatically bring in other files that are linked to those you selected on the previous page. For example, if you import Doc1.htm, which contains a hyperlink to Doc2.htm, this option imports Doc2.htm as well.
    - Import resources Select this option if you want to include any supporting resource files (e.g., stylesheets, images, multimedia files) in the import. Then select one of the following:
        - Keep existing structure The supporting resources files will be copied into folders with the same names and hierarchy as those used in the source.
        - To project resources folder The supporting files will be placed in the Resources folder in your Flare project.
    - Auto-reimport before 'Generate Output' If you selected “Link Generated Files to Source Files” earlier in the wizard, you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can also tell Flare Desktop to do this for you automatically, so that you do not have to. Select this option if you want Flare Desktop to automatically reimport files when you attempt to build output.
8. Click Finish. The Accept Imported Documents dialog opens. The files that will be created as a result of the import are listed on the left. A preview of each file can be seen to the right when you click the file.
9. When you are finished previewing the files to be created, click Accept.

Import Editor—Import and Re-Import

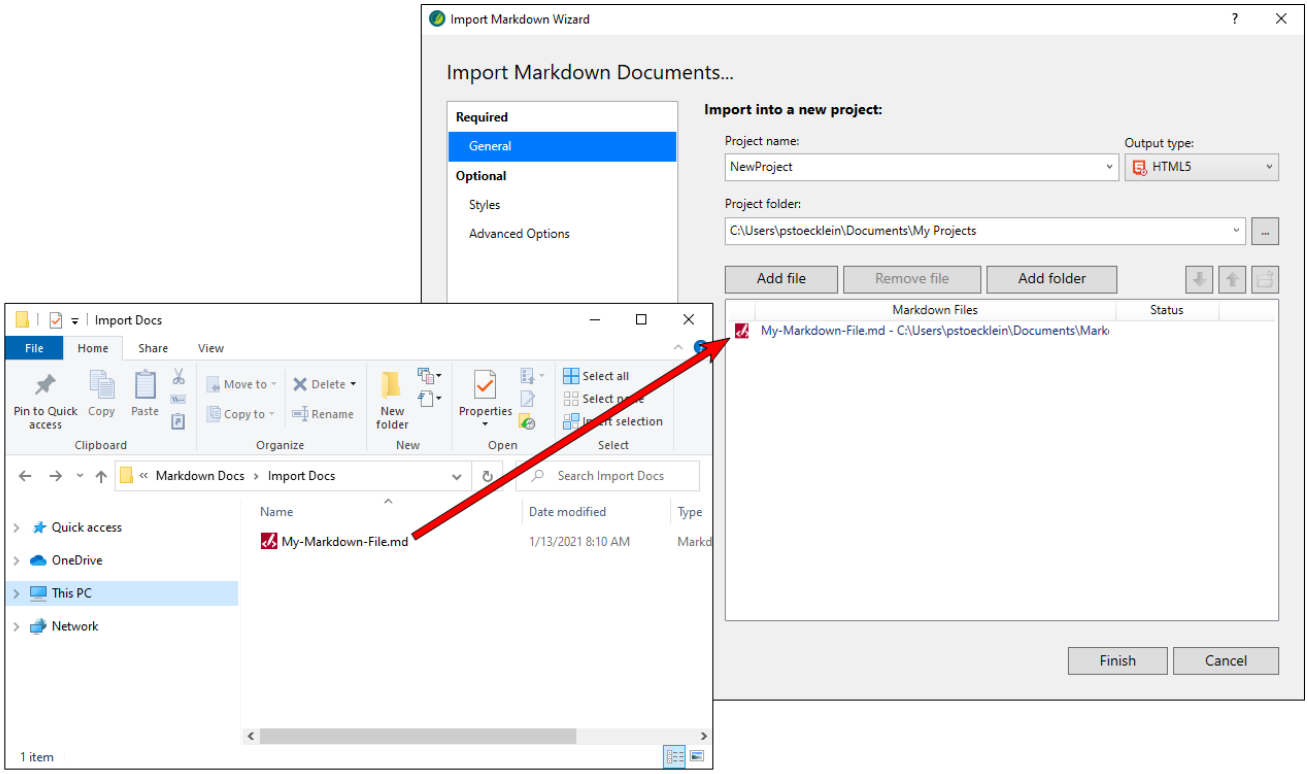
If you add an HTML import file or if you have previously imported HTML files using the wizard, a file is added to the Imports folder in the Project Organizer.

When you double-click this file, it opens in the Import Editor. This editor contains most of the same fields and options as the Import HTML Files Wizard.

After completing or changing any of these fields, you can click Reimport in the toolbar.

Importing Markdown Files

Markdown is a markup language using plain formatting syntax. You can import Markdown (.md) files into Flare projects. This might be necessary, for example, if software developers or subject matter experts write content in Markdown and you want to include that information in your Flare project.



Flavors

There are multiple variations, or "flavors," of Markdown.

- CommonMark This is a standardized syntax of Markdown, and Flare Desktop supports this flavor entirely.
- Other Flavors A variety of other Markdown implementations have been created over the years to support additional features beyond the most common HTML elements. Flare Desktop may import extra markup from those flavors, but some might not be fully supported.

Markdown Syntax and Flare Results

Depending on the Markdown flavor, various syntax and tags will be converted in Flare in different ways. The following resources are helpful to understand Markdown's basic and extended syntax:

- Basic Syntax

  `https://www.markdownguide.org/basic-syntax/`

- Extended Syntax

  `https://www.markdownguide.org/extended-syntax/`

Usually the conversion is straightforward because there is an obvious HTML counterpart.

☆ EXAMPLES

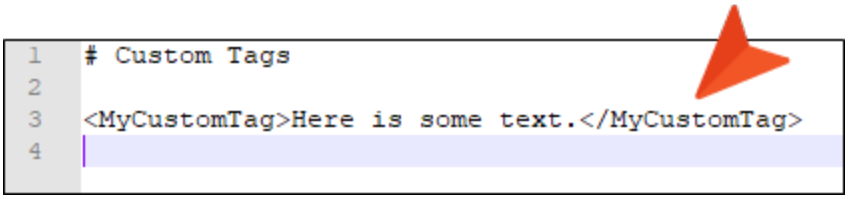
Markdown Syntax	HTML Result in Flare
## My Second-Level Heading	My Second-Level Heading
I am **really** serious!	I am really serious!
- First thing - Second thing - Third thing	 - First thing - Second thing - Third thing

NOTE If you add regular HTML into Markdown files, it will be imported properly into Flare Desktop as HTML.

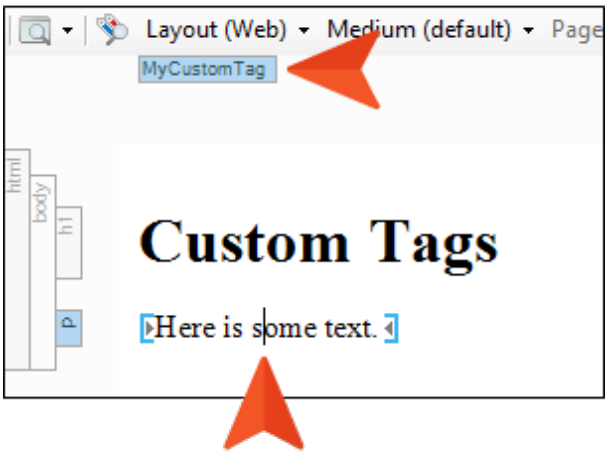
Custom Tags

Flare Desktop is able to import custom tags that you add to Markdown files.

EXAMPLE A person writes the following in a Markdown document.



After this document is imported into Flare Desktop, it will look as follows. Notice the structure bar at the top indicates the custom code tag name when you click inside the content below.



NOTE At this time, MadCap-specific tags (e.g., markup for a drop-down effect) cannot be imported from Markdown into Flare Desktop.

How to Import Markdown Documents

The following steps describe how to import Markdown files using the Import Markdown Wizard. However, you also have the option of adding a Markdown import file and then using the Markdown Import Editor (see "Markdown Import Editor—Import and Re-Import" on page 65).

1. Select **Project > Import > Markdown Documents**.
2. In the wizard, choose either **Import into a new project** (and complete the fields below) or **Import into this project**. However, if you do not have a project currently open, the file(s) will automatically be imported into a new project.
   - **Project name** Type a name for the new Flare project that will be created after you perform the import.
   - **Project folder** Click to find and select a folder.
   - **Output type** Select the primary target for your project.
3. Click **Add file** to choose Markdown documents. You can also select other options as necessary.

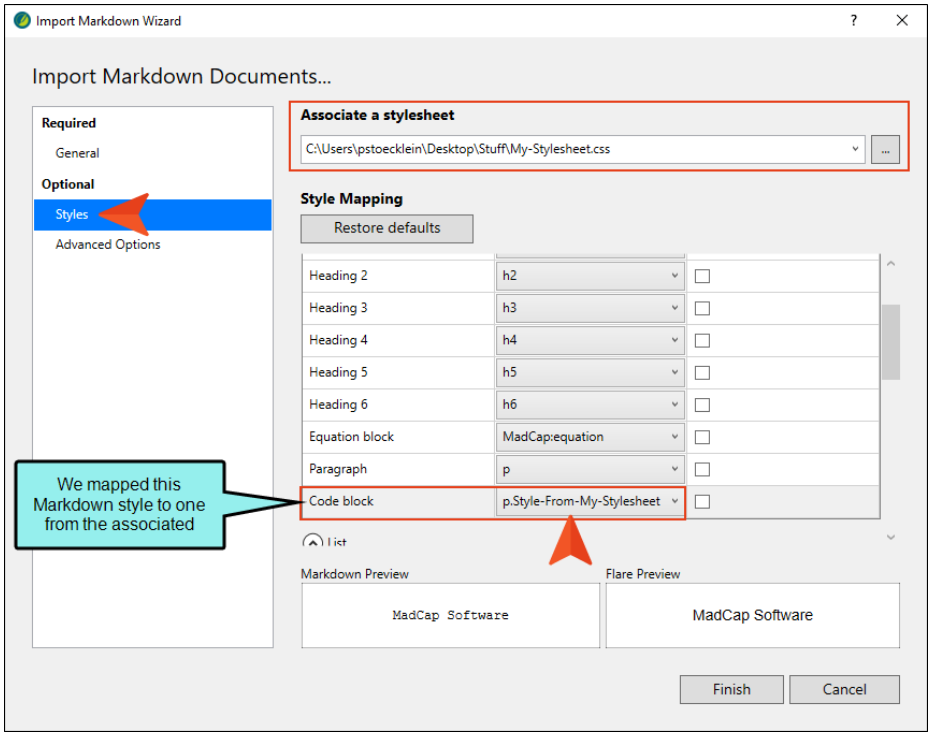
Option	Description
	This removes the selected file(s) from the list.
	This lets you choose a folder, so that all files in that folder are added for the import.
	This moves the selected file or folder lower in the list (if you have more than one to import).

Option	Description
	This moves the selected file or folder higher in the list (if you have more than one to import). The file at the top is used for the name of the Flare TOC that is created as a result of the import. Also, the order determines how the imported files are arranged in the TOC as topics.
	This opens the file that is selected in the list.

4. (Optional) On the left, select **Styles**. You can use this page for various style settings.

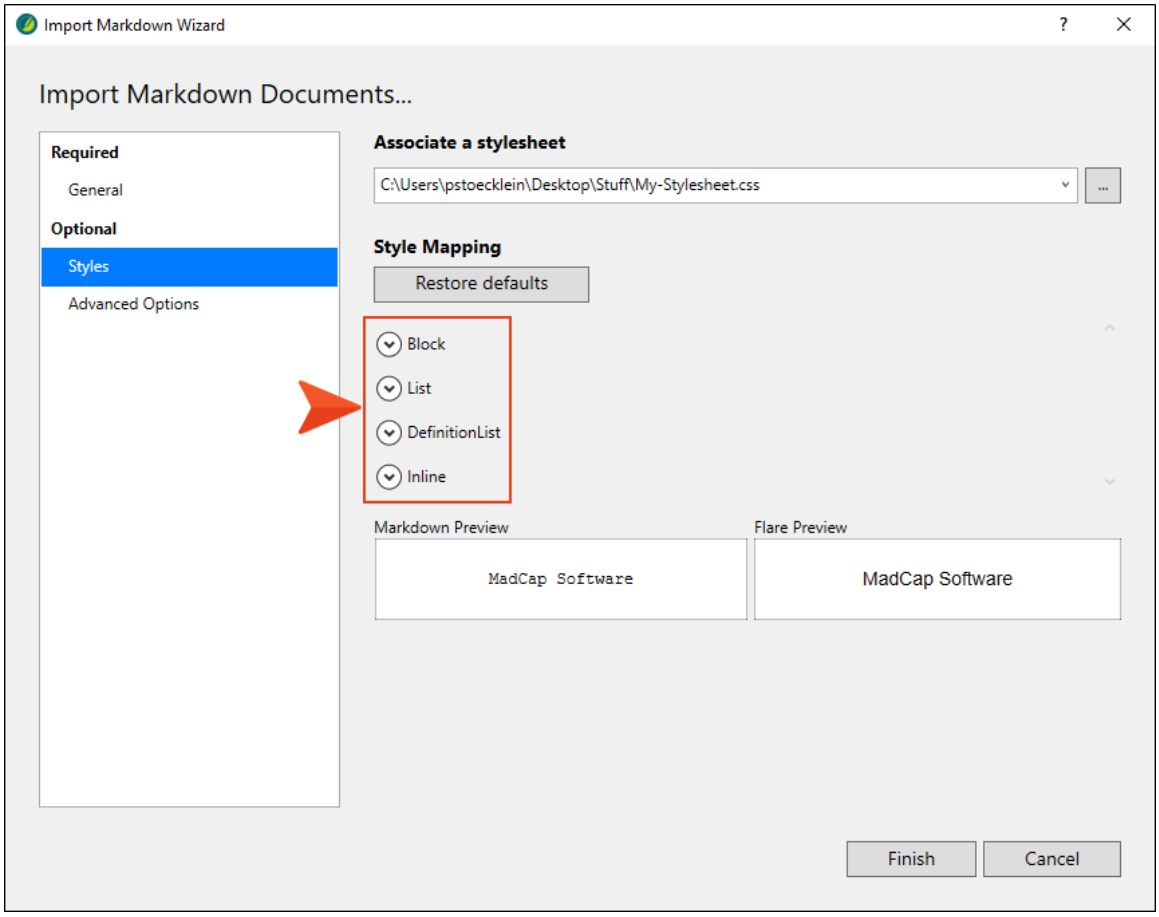
ASSOCIATE A STYLESHEET

This is purely optional. You can choose an existing stylesheet (such as one in the Flare project you are importing files into) by clicking . After doing this, styles from that stylesheet become available in the mapping drop-down fields below, so that you can map Markdown tags to those from the stylesheet you chose.


Import Markdown Wizard
Import Markdown Documents...
Required
General
Optional
Styles
Advanced Options
Associate a stylesheet
C:\Users\pstoecklein\Desktop\Stuff\My-Stylesheet.css
Style Mapping
Restore defaults
Heading 2
h2
Heading 3
h3
Heading 4
h4
Heading 5
h5
Heading 6
h6
Equation block
MadCap:equation
Paragraph
p
Code block
p.Style-From-My-Stylesheet
We mapped this Markdown style to one from the associated
Markdown Preview
MadCap Software
Flare Preview
MadCap Software
Finish
Cancel

STYLE MAPPING

- **Restore defaults** If you make mapping selections in the fields below but then change your mind, you can click this button, which will return the default settings.
- **[Drop-Downs]** You can expand these sections to see the styles found in the Markdown document(s).
  - **Block** These are styles that take up the entire space in a line (e.g., paragraphs, headings)
  - **List** These are styles that are used to create bulleted and numbered lists.
  - **Definition List** These are styles that are used to create definition lists, which are typically groups of terms and definitions.
  - **Inline** These are character-level styles that are applied only to certain words within a block (e.g., hyperlinks, bold text).



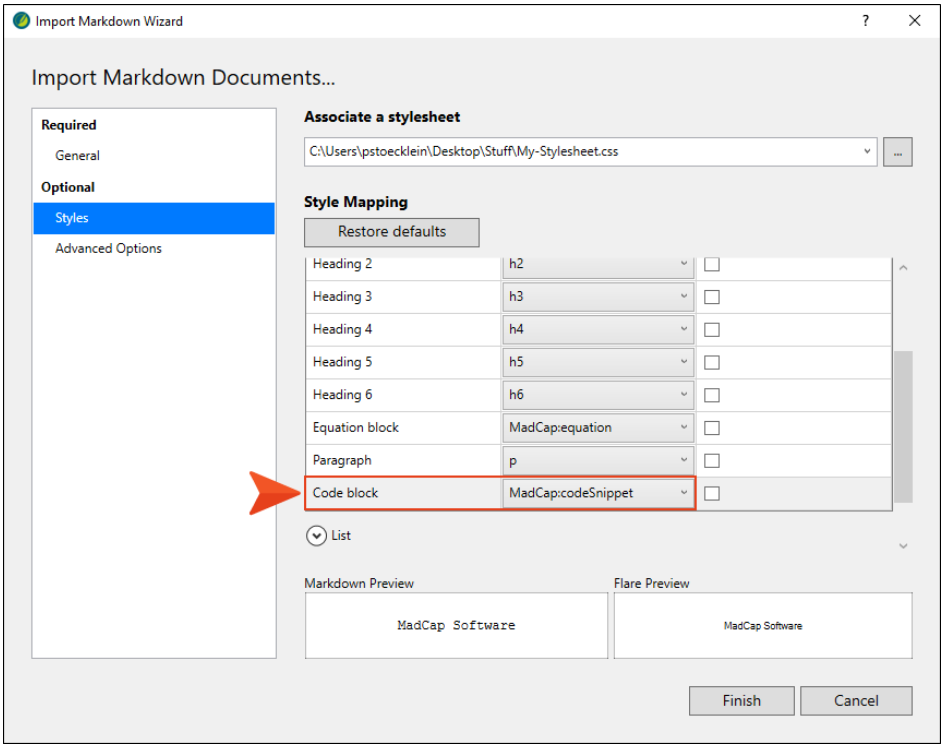
SELECTING STYLES

In these drop-down sections, you can map a style from the Markdown document(s) to another style.

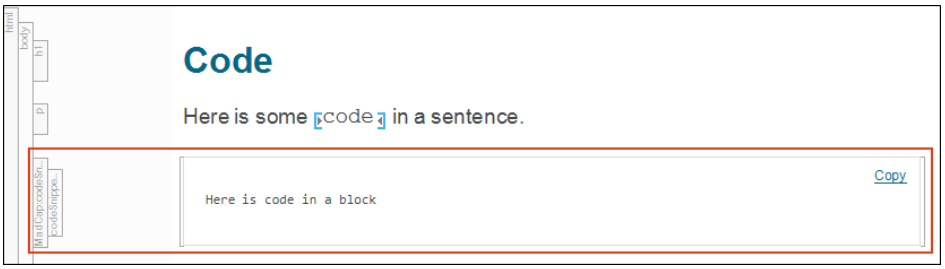
Flare Desktop automatically populates the "Map to" column with the recommended style. For example, if Heading 1 is found in the Markdown document, the recommended style to map to is h1 in Flare Desktop. Therefore, you often don't need to choose a different style. However, sometimes you might want something different. If you want to map the style to something other than what is recommended, click the drop-down in a cell to select a style.

EXAMPLE — Code Blocks

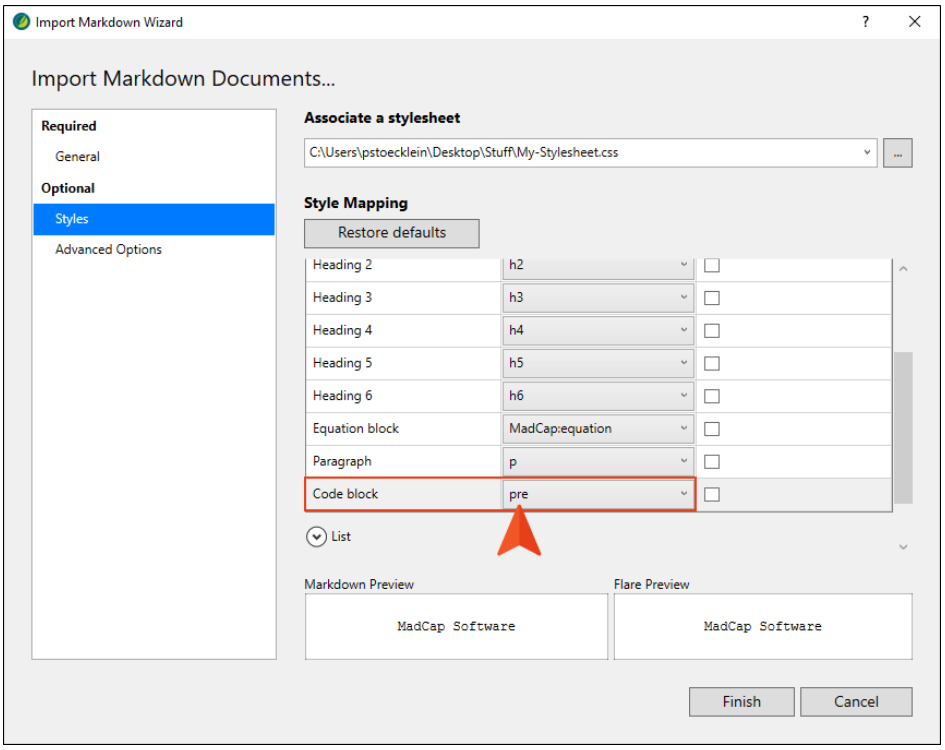
You have a code block in the Markdown document, Flare Desktop initially maps it to the MadCap:codeSnippet style.



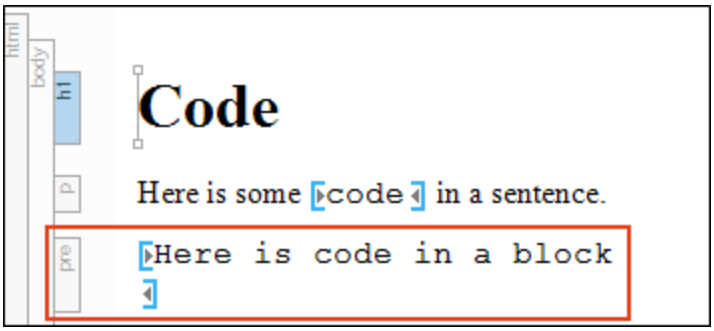
If you leave this setting, the content will be brought in to Flare Desktop like this:



However, you might want to map code blocks to the "pre" style instead.

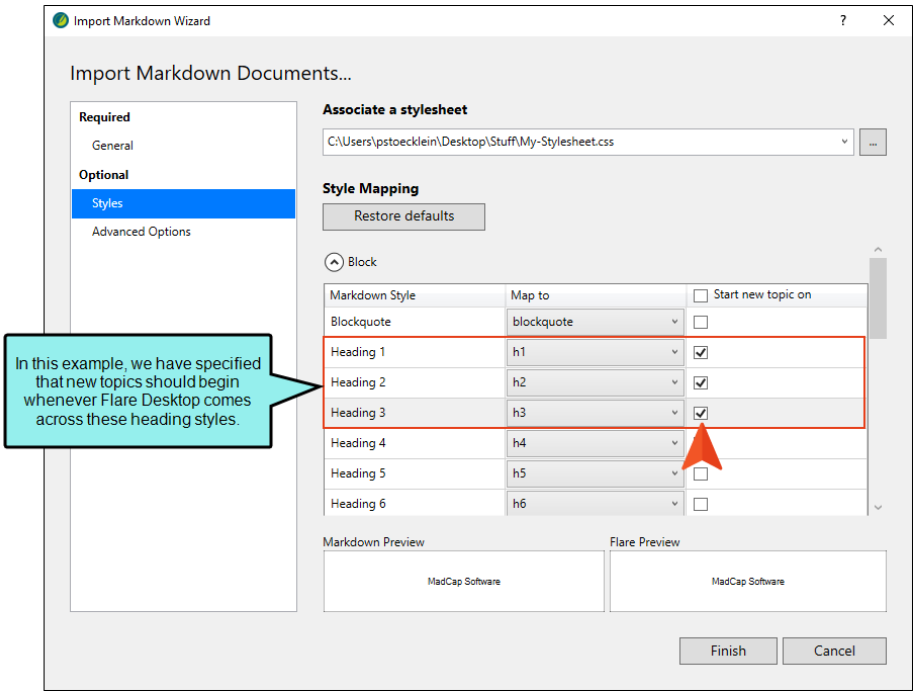


In that case, the content will be imported like this:



SPECIFYING NEW TOPICS

If you want to specify that new topics should start with certain styles, expand the **Block** section and click the check box next to that style. The h1 style is selected by default (most authors start new topics on heading styles), but you can choose any block styles that you like.



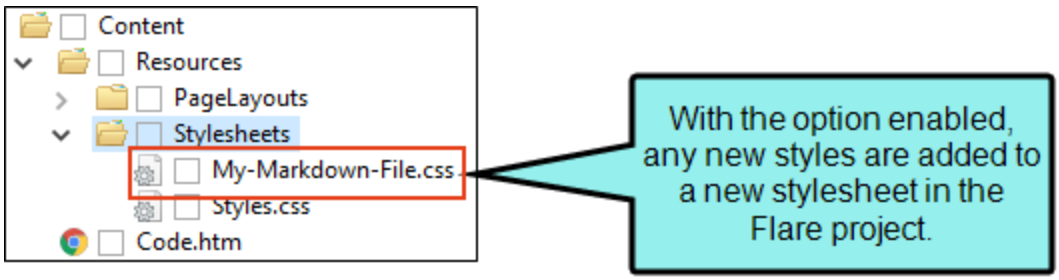
PREVIEW

When you select a style row, a preview is shown at the bottom so you can see how it looks.

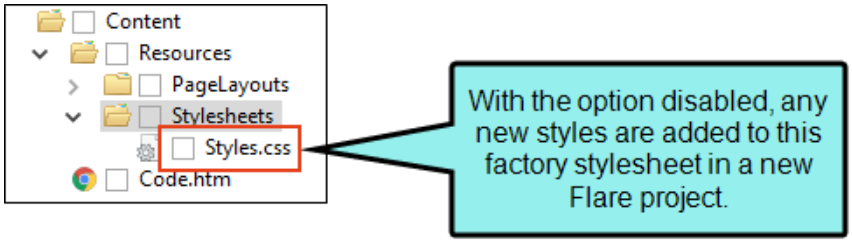
5. (Optional) On the left, select **Advanced Options**. You can use this page to set various options.

STYLES

- **Create new stylesheet** This creates a new stylesheet based on the settings you choose.



If you disable this option, the styles resulting from the import will be added to the project's primary stylesheet.



> **NOTE** If you choose to create a stylesheet when importing Markdown documents into a new project, that stylesheet will be automatically selected in the project properties. If you then open the Markdown Import Editor, deselect the option to create a new stylesheet, and reimport the documents, that stylesheet will continue to exist in the project.

TOPICS

- Convert all simple lists to paragraph lists If you leave this option disabled, bulleted and numbered lists will be imported so that each item in the list just has an <li> tag. If you enable this option, <p> tags will be added within each <li> tag. However, you can add <p> tags later manually for list items where you want them. The benefit of having <p> tags within list items is that you can easily add paragraphs or other content within that item before the next bullet or number is shown.

  > NOTE Markdown supports both simple and paragraph lists. Although you can import simple lists as paragraph lists using this option, the reverse is not true. If you have paragraph lists in Markdown, they will not be converted to simple lists if you deselect the option. Those will just be imported as paragraph lists regardless of the option setting.

- Convert all definition lists to definition paragraph lists If you leave this option disabled, definition lists will be imported so that each item in the list just has a <dd> or <dt> tag. If you enable this option, <p> tags will be added within each <dd> or <dt> tag. However, you can add <p> tags later manually for definition or term items where you want them. Most authors tend to create definition lists without <p> tags, but you can add them if you want.
- Approximate filename length Enter the maximum number of characters to use for naming topic files. The default is 24.

RESOURCES

- Resources If the Markdown files have links to other files, such as images, you can select this option to include those files in the import. However, the files need to be located on your computer in order to be imported.
  - To project resources folder Select this to automatically import any extra files to the Resources folder in your project.
  - To folder Select this if you want to import the extra files into a specific folder, such as a subfolder under Resources, or even in a different folder in the Content Explorer. Then use the field below to choose the folder.

TABLES

- Leave table styles as is This imports tables in a plain format with no styling.
- Apply a selected table stylesheet to all imported tables This lets you select an existing Flare table stylesheet and apply it to all imported tables. That way, the imported tables will automatically have the look and feel associated with that table stylesheet.

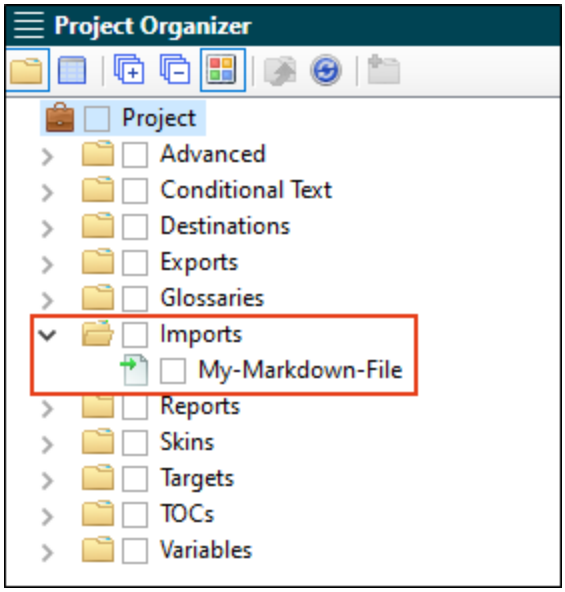
REIMPORT

- Link generated files to source files Enable this if you want to continue editing in Markdown and reimport as needed. Deselect it if you want to edit the imported files in Flare Desktop going forward, severing the connection to the source files.
- Auto-reimport before generate output If you selected "Link generated files to source files," you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can use this option instead and let Flare Desktop reimport the files automatically when you attempt to build output.

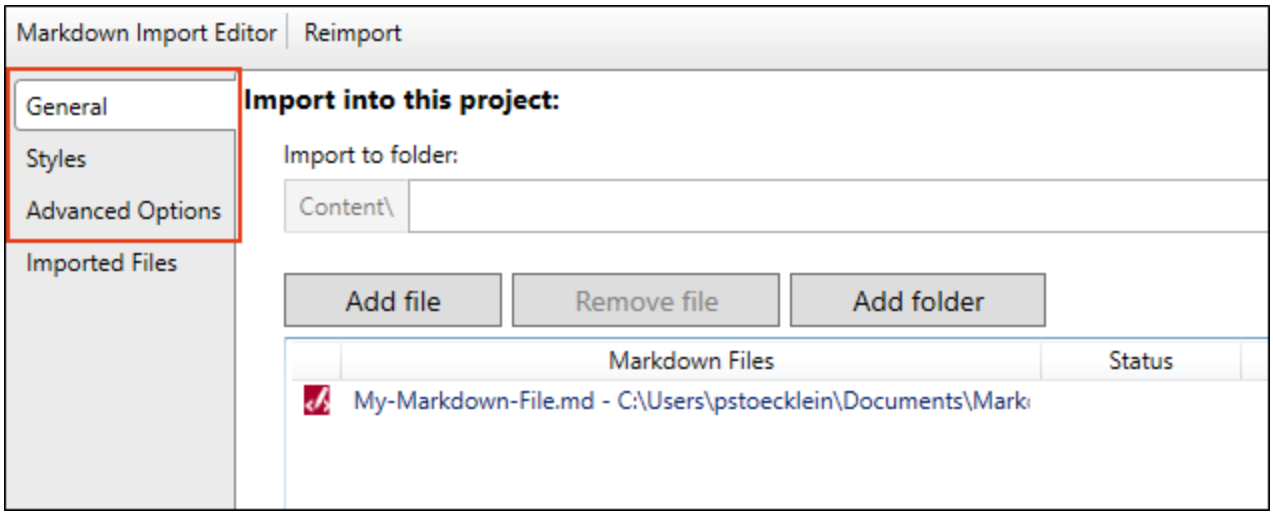
6. Click Finish, then Accept.

Markdown Import Editor—Import and Re-Import

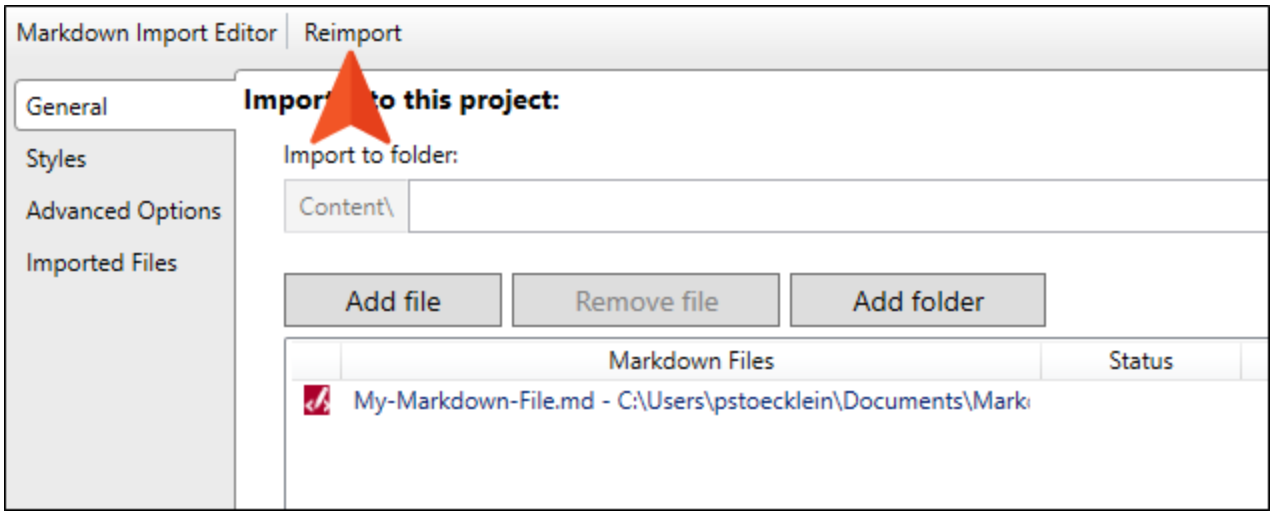
If you add a Markdown import file or if you have previously imported Markdown files using the wizard, a file is added to the Imports folder in the Project Organizer.



When you double-click this file, it opens in the Markdown Import Editor. This editor contains most of the same fields and options as the Import Markdown Wizard.



After completing or changing any of these fields, you can click **Reimport** in the toolbar.



Importing Confluence Files

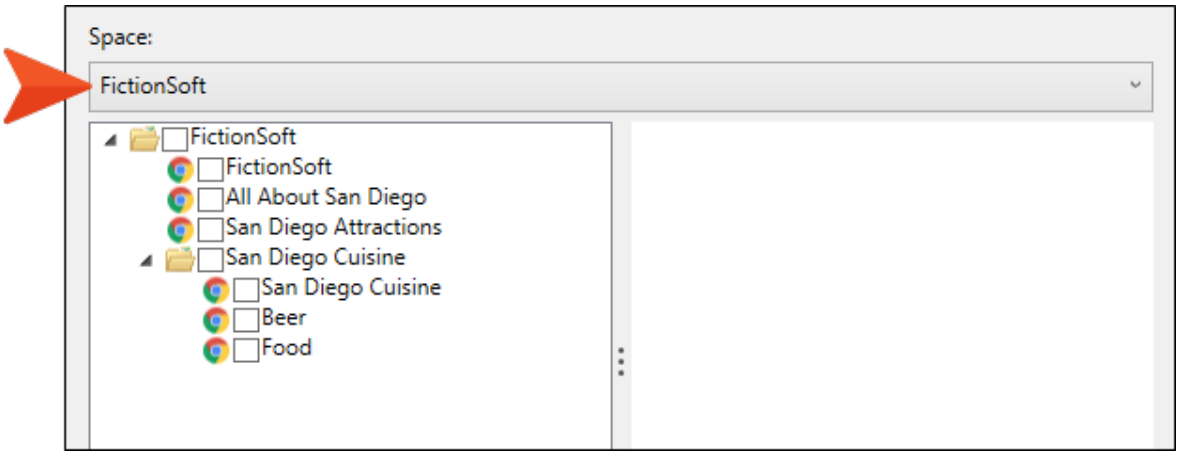
If you have an Atlassian Confluence account, you can import pages (HTM and resource files) into Flare projects. You can import these files into a new Flare project or an existing one. Flare Desktop supports both the cloud and local versions of Confluence.

How to Import Confluence Pages

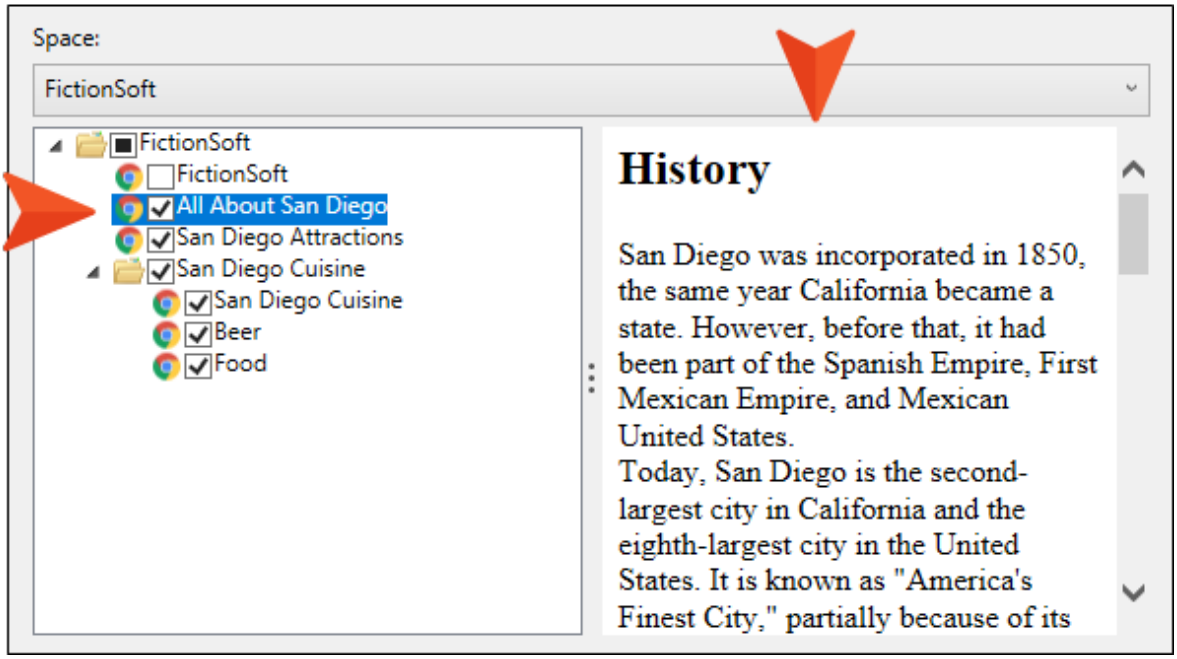
1. Select **Project > Import > Confluence Pages**.
2. In the wizard, choose either **Import into a new project** (and complete the fields below) or **Import into this project**. However, if you do not have a project currently open, the file(s) will automatically be imported into a new project.

   PROJECT FIELDS

   - **Project name** Type a name for the new Flare project that will be created after you perform the import.
   - **Project folder** Accept the default location for the new project or click ... to find and select a folder.
   - **Output type** Select the primary target for your project.
3. Complete the **Confluence Server**, **Username**, and **Password** fields. Then click **Submit**. The Workspace Selection page should open automatically.
4. From the drop-down, select the space from which you want to import.



5. In the tree, select the pages to be imported. If you click on an item, a preview for it displays to the right.



6. (Optional) On the left, select **Advanced Options** and choose options as necessary.

TOPICS

- **Import linked pages** Select this if you want to automatically bring in other files that are linked to those you selected from the tree. For example, if you choose to import a page called “Beer,” which contains a link to a page called “Food,” this option imports both pages.
- **Remove inline formatting** Select this if you do not want to keep any inline formatting in the pages. If you do not select this option, the formatting will be retained. However, keep in mind that styles, rather than inline (local) formatting, is recommended in Flare projects.
- **Remove style classes** Select this if you want to remove any style classes that Confluence might have added to elements (such as tables and images). Otherwise, you might have some undefined styles after the pages are imported into Flare Desktop.

RESOURCES

- Import resources Select this option if you want to include any supporting resource files (e.g., images, multimedia) in the import. In Flare Desktop, these will be added to the Resources folder in the Content Explorer, and they will link to the appropriate topics.

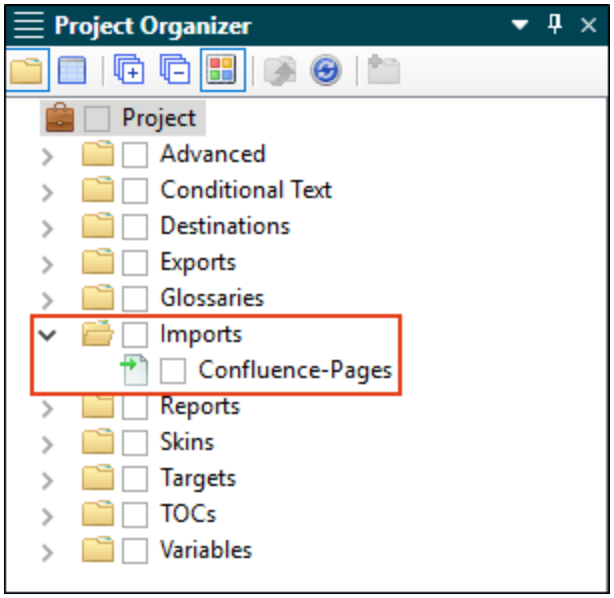
REIMPORT

- Link generated files to source files Select this option if you want to continue editing in Confluence and reimport as needed. Deselect it if you want to edit the imported files in Flare Desktop going forward.

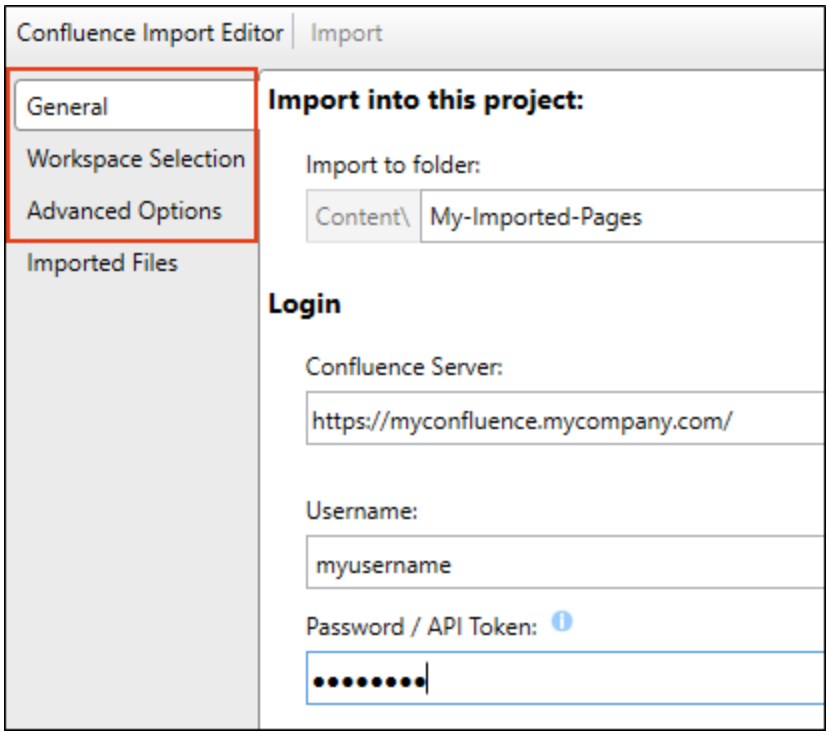
7. Click Finish and Accept.

Confluence Import Editor—Import and Re-Import

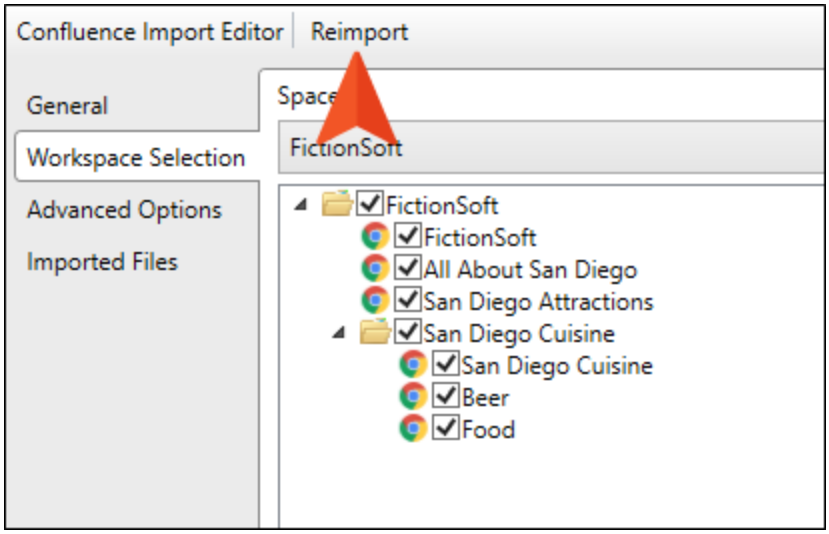
If you add a Confluence import file or if you have previously imported Confluence files using the wizard, a file is added to the Imports folder in the Project Organizer.



When you double-click this file, it opens in the Confluence Import Editor. This editor contains most of the same fields and options as the Import Confluence Wizard.



After completing or changing any of these fields, you can click Import or Reimport in the toolbar.



How Elements are Converted From Confluence to Flare

Certain elements from Confluence are converted to their closest counterparts in Flare. The following table describes this.

Confluence	Flare Desktop
Paragraph Styles	
Article title	H1
Heading 1 through Heading 6	H1 through H6
Preformatted	Text surrounded by <pre> tags
Quote	Text surrounded by <blockquote> tags
Character Styles	
Bold	Text surrounded by tags
Font color	Text surrounded by tags
Italic	Text surrounded by tags
Monospace	Text surrounded by <code> tags
Strikethrough	Text surrounded by <s> tags
Subscript	Text surrounded by <sub> tags

Confluence	Flare Desktop
Superscript	Text surrounded by <sup> tags
Underline	Text surrounded by <u> tags
Lists	
Bulleted list	Bullet list
Numbered list	Numbered list
Task list	Bullet list
Alignment	
Center	Center
Left	Left
Indent	Indent
Outdent	Outdent
Right	Right
Content	
Date	Text

Confluence	Flare Desktop
Emoticon	SVG image
Gallery	Table containing images
Horizontal rule	Horizontal rule
Info	Text surrounded by tags
Link	Link
Markup	Text
Status	Text surrounded by tags
Symbol	Symbol
Table of contents	Links in bulleted list
Task list	Bulleted list
User mention	Link
Other Macros	
Blog post	Text surrounded by tags
Change history	Links in table

Confluence	Flare Desktop
Content by label	Text surrounded by tags
Content by user	Links in table
Content report table	Text in table
Contributor	Link
Contributor summary	Text and links in table
Create from template	Link
Except include	Text
Favorite pages	Text and links
Include pages	Text
Labels list	Links
Microsoft Office Excel	File added to Content Explorer
Microsoft Office PowerPoint	File added to Content Explorer
Microsoft Office Word	File added to Content Explorer
Multimedia	Multimedia file with image as placeholder

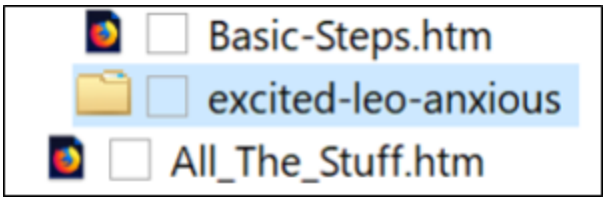
Confluence	Flare Desktop
PDF	File added to Content Explorer
Popular labels	Links in bulleted list
Recently updated	Links and text
Recently updated dashboard	Links
Related labels	Text
Space attachments	Links and text in table
Space details	Text
Spaces list	Links in table
Status	Text
Task report	Text and links in table
User profile	Links
Formatting	
Code block	Text surrounded by tags
Column	Text surrounded by tags

Confluence	Flare Desktop
Expand	Text surrounded by tags
Info	Text surrounded by tags
No format	Text surrounded by tags
Note	Text surrounded by tags
Panel	Text surrounded by tags
Section	Text surrounded by tags
Tip	Text surrounded by tags
Warning	Text surrounded by tags
Navigation	
Children display	Link
Livesearch	Search bar in output
Page index	Link in table
Search results	Text and links
Table of content zone	Text

Confluence	Flare Desktop
Table of contents	Links
Reporting	
Global reports	Links and text in table
Page properties	Text
Page properties report	Text in table
Popular labels	Links

What's Noteworthy?

NOTE If you import a GIF image using the GIPHY integration in Confluence, the file will be imported without an extension and will resemble a folder in the Content Explorer.



Importing FrameMaker Files

You can import Adobe FrameMaker files into a Flare project.

TIP Before diving in to the import process, it is recommended that you first download and review the *Transition from FrameMaker Guide*. This guide provides tips for making sure the FrameMaker import process goes as smoothly as possible. See "PDFs" on page 166.

NOTE You must have FrameMaker installed on your computer in order to import FrameMaker files.

How to Import FrameMaker Files

1. Select **Project > Import > FrameMaker Documents**.
2. Select **Import into a new project** or **Import into this project** (if you already have a project open). If it is a new project, enter a project name, and select a folder location (if different from the default) and primary output type. Then click **Next**.
3. Click .
4. Find and select the files you want to import. 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.

   You can select BOOK, FM, or MIF files.

   > **TIP** When possible, it is recommended that you select a Adobe FrameMaker BOOK file for import and let Flare Desktop locate and import all the associated document files within the Adobe FrameMaker book.

5. (Optional) Use other options on the page as necessary. Then click **Next**.

Option	Description
	This opens the file that is selected in the list.

Option	Description
Link Generated Files to Source Files	This creates a connection between the original files and the files that are created as a result of the import. This is useful if you want to continue editing the content outside of Flare Desktop, instead of editing in the Flare project. Flare Desktop recognizes when changes have been made to the source documents and reminds you to reimport the documents to ensure the Flare project also reflects the changes. If you use this option, a link icon is added to the top of a linked file in the Flare Desktop interface. This lets you know that you need to edit the source file, rather than editing this file. If you remove the connection to the source file, this icon no longer displays on the file. Please note that if you have bound the project to source control, the icons used for source control take precedence over the link icon.
	This removes the selected file(s) from the list.
	This moves the selected file higher in the list (if you have more than one file to import). The file at the top is used for the name of the content folder holding the imported topics in Flare Desktop. Also, the order determines how the imported files are arranged in the Flare TOC that is created as a result.
	This moves the selected file lower in the list (if you have more than one file to import).

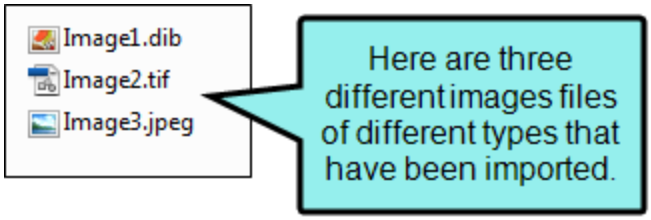
6. (Optional) Split the FrameMaker documents into smaller topics during the import based on styles. Double-click any of the styles on the left, moving them to the right. Then Click **Next**.

> ☆ EXAMPLE If you have a style called "Heading 2" in your FrameMaker documents, you might want new topics to be created whenever Flare Desktop finds a Heading 2 style in a document. So you would double-click Heading 2 and move it to the right side of the page.

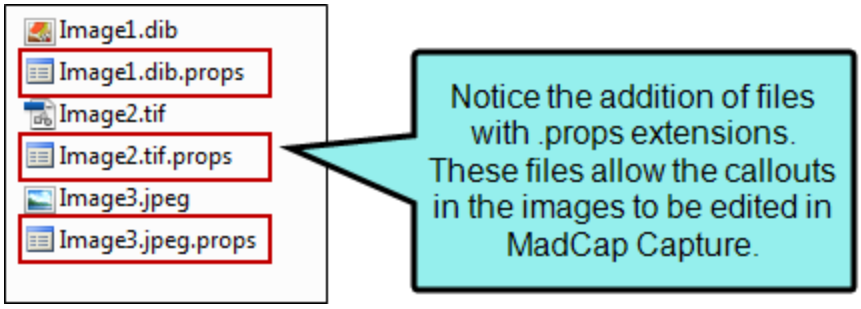
7. (Optional) Use any options to further customize the import. Then click **Next**.
    - Add "Topic Continued" links when appropriate Select this option to place a "Topic Continued" link at the bottom of pages when a long topic has been split into multiple ones.
    - Add "Topic Continued From" links when appropriate Select this option to place a "Topic Continued From" link at the top of continued pages when a long topic has been split into multiple ones.
    - Cross-Reference Format Use this field to specify the format for the "Topic Continued" and "Topic Continued From" links. Flare Desktop provides a cross-reference format for you—(continued in {title}) or (continued from {title}). With this cross-reference format, the link contains the words "continued in" or "continued from" within parentheses, followed by the text of the first paragraph in the connected topic. If you do not want the link to use that particular text, you have a couple of options. First, in Flare Desktop, you could manually enter a heading in each topic that is connected to another topic included in the split. That text will be used in the link instead (after you update the cross-references in Flare Desktop). Another option is to modify the format by clicking the Edit button.
        - Edit If you want to modify the cross-reference format provided, click this button, which opens the Cross-Reference Format dialog.
    - Split Long Topics Select this option if you have long sections in your source documents and want to make sure that they are converted to multiple topics (rather than one very long topic).
        - Threshold Enter the maximum number of characters to be converted to a topic before a new topic is created. Flare Desktop will break the topic at the nearest paragraph to the threshold value. That way, a new topic will not start in the middle of a sentence or word, but at the beginning of a paragraph.
    - Avoid Creating 'Empty' Topics Select this option if you want to ensure that new topics are not created when large sections are found in the FrameMaker documents without any content.
        - Threshold Enter the maximum number of empty character spaces allowed in a topic. If this number is exceeded, Flare Desktop will not create a new topic from that empty space.

- Anchored Frames With Images You can use this area to specify how Flare Desktop should handle anchored frames that contain images as well as other content (e.g., text callouts).
  - Generate Images Without Callouts If the anchored frame contains an image along with callout text, the original image is imported *without* the callout text. You might select this option if you have resized the image in FrameMaker. With this option, the imported image is likely to be of a higher quality than it would be otherwise. You can then add a callout to the image once it is inside Flare Desktop.
  - Generate Images With Callouts If the anchored frame contains an image along with callout text, Flare Desktop creates a PROPS (i.e., properties) file along with the image file when that document is imported. This means that you can open those image files in MadCap Capture to edit those callouts after the import process is completed.

EXAMPLE If you import anchored frame images and tell Flare Desktop not to include the callouts, your imported image files will look something like this in Windows Explorer.



On the other hand, if you import the same images and tell Flare Desktop to include the callouts, it will look something like this in Windows Explorer.



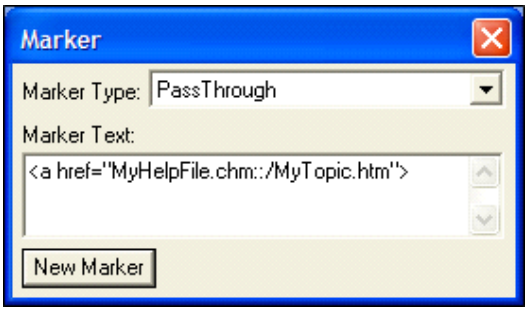
NOTE Some FrameMaker elements—such as arcs and nested frames—are not supported with this option.

- Generate Flattened Images If the anchored frame contains an image along with callout text, a new flattened image will be created as a result. The callout is included, but you cannot edit it.

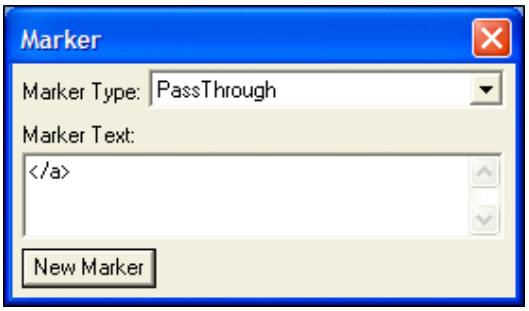
- Preserve Image Size This option affects how the size of imported images are handled.
  - Option Selected The original image is imported. However, the <img> tag is modified in the imported file to closely reflect the height and width of the image in the FrameMaker document. This is done regardless of whether you are importing linked or embedded images from FrameMaker documents.
  - Option NOT Selected The <img> tag is not modified in the imported file. Instead, the image is referenced at 100% of its original value.
- Auto-reimport before 'Generate Output' If you selected “Link Generated Files to Source Files” earlier in the wizard, you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can also tell Flare Desktop to do this for you automatically, so that you do not have to. Select this option if you want Flare Desktop to automatically reimport files when you attempt to build output.
- Approximate Filename Length Enter the maximum number of characters to use for naming new topic files that are automatically created after splitting a long topic. The default is 24.
- Enable 'Passthrough' Markers Select this check box to include a check mark if you have created passthrough markers in your FrameMaker source documents.A passthrough marker is a special marker that you can insert into your FrameMaker source content when you have information or code that you plan to import to Flare Desktop and want left alone (or "passed through," leaving it exactly as you have authored it, rather than processing it). A passthrough marker can be just about anything, as long as supports it in the XHTML code.You can specify how the marker content should be treated when the FrameMaker document is imported. The first option is that you can import the marker content as regular text (which is the default setting). The second option is that you can import the marker content as an XML fragment (e.g., the first part of a bold tag—<b>—but not the second part). The third option is that you can import the marker content as a complete XML tag. You might use a passthrough marker for various reasons, such as for importing a marker as XHTML or JavaScript code.

☆ EXAMPLE You plan to import some FrameMaker documents to Flare Desktop and you have locations in those documents where you want to link to CHM files. The problem is that FrameMaker does not allow you to create links to CHM files in such a way that those links can then be imported into another software application.

Therefore, you create a passthrough marker in the FrameMaker document, providing the beginning "href" tag and path to the CHM file. Like this:



Then you create a second passthrough marker, providing the end tag for the link. Like this:



When you import the FrameMaker document(s), you can specify that the passthrough markers should be imported as XML fragments. In Flare Desktop, the link to the CHM file will look and work as it should.

- Passthrough Marker Format After you enable passthrough markers, click the down arrow in this field and select the type of format that you want to use for the import.
  - text The marker content will be imported as regular text (default setting).
  - fragment The marker content is imported as an XML fragment (e.g., the first part of a bold tag—<b>—but not the second part). If you select this option, you will probably need a second marker in the FrameMaker document to complete the XML tag.
  - xml The marker content is imported as a complete XML tag.
- Convert equations to MathML Select this option to convert MathFullForm equations (the FrameMaker-specific format) to MathML (the web standard and Flare format). If you disable this option, equations from FrameMaker are converted to images.
- Convert Table Styles If you have tables in your FrameMaker documents that you have formatted in a certain way, select this check box if you want to create matching table styles as a result of the import. In the Flare project, the new table styles will be named after the format named applied to the table in FrameMaker (e.g., "Format_A.css," "Format_B.css," and so on). You can rename these table stylesheets in Flare Desktop after the import finishes. Even if you do not use this mapping feature, the table formatting still comes across when you import the documents. The only difference is that table stylesheets make it easier to maintain the formatting of your tables within Flare Desktop.
- Reimport Table Styles This option displays only if you are working in the Import Editor, rather than the wizard. This option is useful after you have already imported FrameMaker documents and converted the formatting in your tables into at least one table stylesheet in Flare Desktop. You can use this option to determine whether tables should be imported again as table styles when you reimport. You might want to keep this check box selected for some reimports, but other times you might want to deselect it when reimporting.

☆ EXAMPLE You want the formatted tables in your FrameMaker documents to be converted to table styles when you perform the initial import into a Flare project. Therefore, in the import wizard, you turn on the "Convert Table Styles" option. As a result, let's say that Flare Desktop creates a new table style and calls it "FormatA.css."

After the initial import, you realize you want the tables to look a little different. Therefore, in the Flare project, you modify the properties of the FormatA.css table stylesheet.

Awhile later, let's say you want to reimport the FrameMaker documents. The problem is that you've already changed the table stylesheet in Flare Desktop. You probably want to keep the tweaked table style so that you don’t have to modify it again after the import.

This is where the new "reimport" option comes into play. It determines whether or not a second new table stylesheet will be created, based on the old look from the tables in the FrameMaker documents.

Here's one scenario. Let's say that before you reimported the FrameMaker documents, you selected the "Reimport Table Styles" option in the Frame Import Editor. And during the import when you were prompted, you selected not to overwrite the existing FormatA.css table stylesheet. In that case, Flare Desktop keeps your tweaked stylesheet in the project, but it also creates another table stylesheet called "FormatA1.css" that has the old look and feel. All of the reimported content now links to the FormatA1.css stylesheet instead of FormatA.css.

Here's a different scenario. Let's say that you perform the same steps described above, except this time you deselected the "Reimport Table Styles" option in the Frame Import Editor. In that case, the second FormatA1.css file is not created. The imported content is linked to the FormatA.css table stylesheet that you previously modified, since it already exists in the project.

8. (Optional) Specify whether the imported topics should be associated with a stylesheet and/or styles from your FrameMaker files. Then click **Next**.
    - **Stylesheet** If you already have a CSS file that you want to associate with the imported files, click the **Stylesheet** button. Then navigate to the stylesheet and select it.
    - **Preserve FrameMaker Styles** This retains any style formatting from your FrameMaker documents so that you can continue to use that look and feel in Flare Desktop. For example, if you use a style called "Heading 1" in your source documents and that style is blue, it remains blue after you finish the import to Flare Desktop and the new style is created. Also, selecting this option affects which mapping styles are available as you continue to make your import selections. If you select this option, you can map the FrameMaker styles to new Flare styles that keep the name of the FrameMaker style (e.g., *Heading 1* becomes *h1.Heading 1* in Flare Desktop).
    - **Don't Preserve FrameMaker Styles** This does not keep the style formatting used in the FrameMaker documents. For example, if you use a style called "Heading 1" in your source documents and that style is blue, that color (and any other settings for that style) are not kept after you finish the import to Flare Desktop. You will still have styles associated with your content, but it will not look like it did in the source documents. Also, selecting this option affects which mapping styles are available as you continue to make your import selections. If you select this option, you can map the FrameMaker styles to new Flare styles that either keep the name of the FrameMaker style (e.g., *Heading 1* becomes *h1.Heading 1* in Flare Desktop) or do not (e.g., *Heading 1* becomes *h1* in Flare Desktop).

- Conversion Styles This opens the Import Styles Editor, which lets you specify how to convert each property of the FrameMaker styles. If you do not enter a property value, the value from the FrameMaker document is used. If you enter a property value, it overrides the value from the FrameMaker document. This button is used only if you have selected "Preserve FrameMaker Styles."

  ☆ EXAMPLE You might use this button, for example, if you need to change a cross-reference format coming from FrameMaker into something more meaningful in Flare Desktop. There are some cross-reference building blocks in FrameMaker that do not have an equivalent in Flare Desktop. In cases such as these, the formats are preserved after conversion to Flare Desktop. However, the formats may therefore appear to be broken, but they are preserved to let you know that there was some formatting in a cross-reference style that Flare Desktop did not understand; you can then make changes to the cross-reference style in the stylesheet. Therefore, if you already know ahead of time that you have a cross-reference style that will need to be modified for use in Flare Desktop, you can use the Conversion Styles button and change the cross-reference format to something that Flare Desktop understands.

9. (Optional) Map paragraph styles from the FrameMaker documents to Flare's paragraph styles. Then click Next.

   Your FrameMaker style will adopt the name of that style. To map a style, click the style in the FrameMaker Styles column on the left, click a style in the Flare Styles section on the far right, and then click the Map button. If you previously elected not to preserve the FrameMaker styles, it is recommended that you map to a standard CSS parent style—e.g., map your first-level heading style to h1, not to h1.(FrameMaker Style).

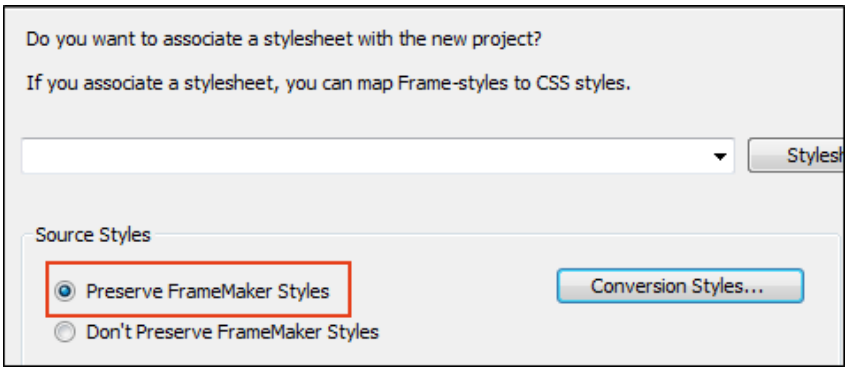
   The style is added to the Flare Styles column. When you are finished importing the documents and the new Flare project is loaded, the content that had been associated with the style in the FrameMaker document will now be associated with a new style that you mapped it to.

EXAMPLE — Preserve Styles

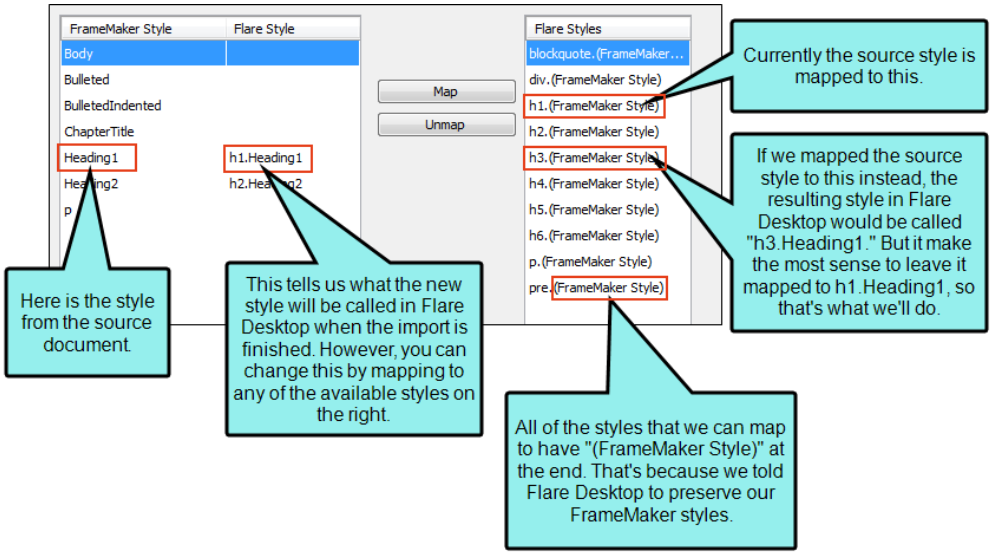
Let's say you have a style in your FrameMaker source document called "Heading1" that is using Arial 14 pt and is red, like this.

Hello

During the process of importing your FrameMaker document using the Import FrameMaker Wizard, you select the option to *preserve* your FrameMaker styles.



The next page of the wizard looks something like this:



When you finish importing, the content that was associated with Heading1 in the source document is still using Arial 14 pt and is red, just like it was before in FrameMaker. However, the style is now called "h1.Heading1." In the world of cascading style sheets (CSS)—which is what Flare Desktop uses for controlling the look of content—you've created a class of the h1 style (h1 is the standard style for first-level headings). But because you wanted to keep the look of the FrameMaker style, Flare Desktop added it as a child under its parent, h1.

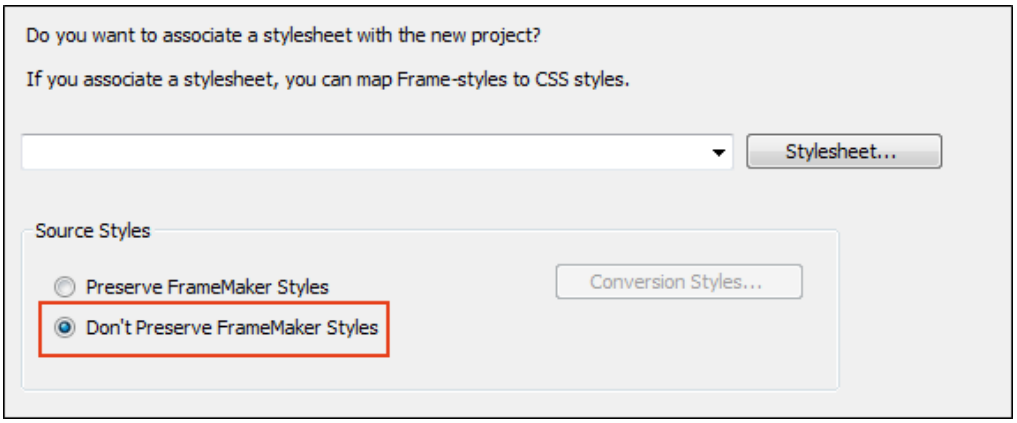
If you make any future changes in Flare Desktop to the h1 style, they will trickle down to the h1.Heading1 child (unless the child style has explicit settings that conflict with the parent). You can also apply style properties directly to the h1.Heading1 child. So while it is generally a good idea to use standard CSS parent styles (such as h1) when possible in Flare Desktop, the mapping performed in this import process—and the subsequent creation of a child style—lets you keep the Arial 14 pt red look.

☆ EXAMPLE — Do Not Preserve Styles

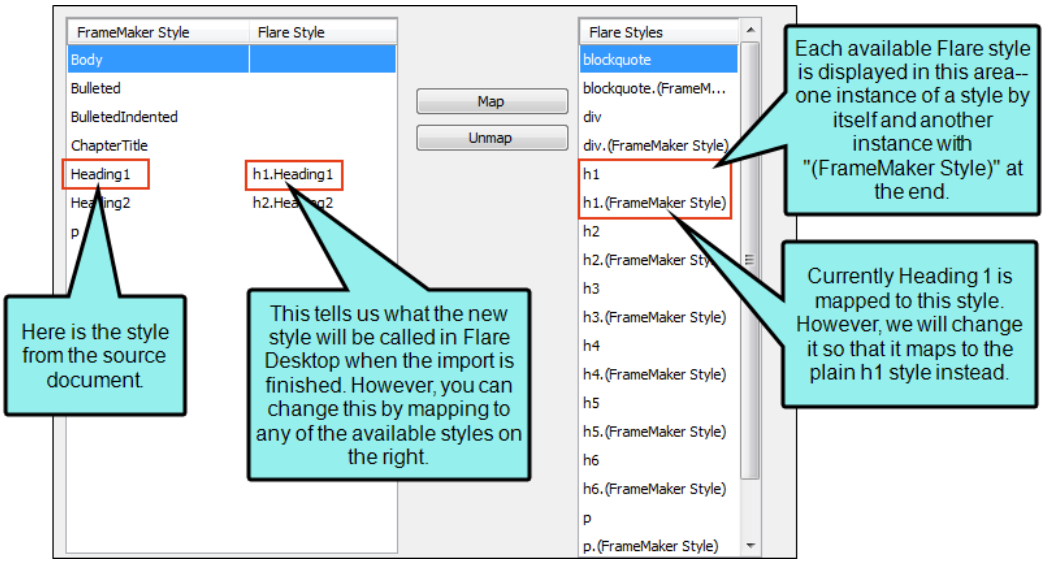
Let's say you have a style in your FrameMaker source document called "Heading1" that is using Arial 14 pt and is red, like this.

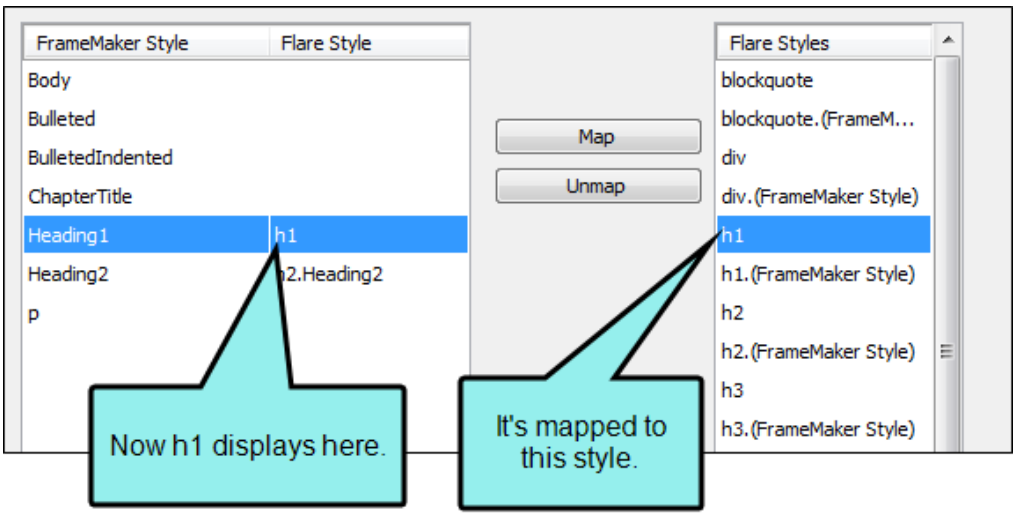
Hello

During the process of importing your FrameMaker document using the Import FrameMaker Wizard, you select the option to *not preserve* your FrameMaker styles.



The next page of the wizard looks something like this.





When you finish importing, the content that was associated with Heading1 in the source document is no longer using Arial 14 pt, red. Instead, it looks something like this.

Hello

Also, the style is now called "h1." (Keep in mind that, even if you had mapped the style to "h1.(FrameMaker Style) in this case, the formatting would still be removed.)

So although the formatting was not retained, you were able to map to the standard CSS style for first-level headings—h1 .

10. (Optional) Map character styles from the source documents to Flare's character styles. Then click **Next**.

    Your FrameMaker style will adopt the name of that style. This works the same as the feature for mapping paragraph styles, except it has to do with character-level styles. To map a style, click the style in the **Framemaker Style** column, click a style in the **Flare Styles** section, and then click the **Map** button.

    The style is added to the Flare Styles column. When you are finished importing the documents and the new Flare project is loaded, the content that had been associated with the style in the FrameMaker document will now be associated with a new style that you mapped it to.

11. (Optional) Map cross-reference (x-ref) styles from the FrameMaker documents to Flare's cross-reference styles. Then click **Finish**.

    In this way, you can have your FrameMaker style take on the appearance of the Flare style that you map it to. To map a style, click the style in the **FrameMaker Style** column on the left, click a style in the **Flare Styles** section on the far right, and then click the **Map** button.

    The style is added to the Flare Style column. When you are finished importing the documents and the new Flare project is loaded, the content that had been associated with the FrameMaker style in the FrameMaker document will now be associated with a new style that has the appearance of the style that you mapped it to.

    What happens if you do not map a style? In the case of cross-reference styles, they are automatically added as style classes under the MadCap|xref style. For example, let's say you import a style called "PageOnly" from your source document and do not map it to anything. In that case, it will be called "MadCap|xref.PageOnly" in the resulting project.

12. When you are finished previewing the files to be created, click **Accept**.

NOTE For each template page used in your FrameMaker documents, a corresponding page layout is automatically created in your Flare project. You can use the page layouts to configure pages for print-based output. You can then create chapter breaks for your print-based output and assign these page layouts to the different topics in the output.

NOTE Flare Desktop supports FrameMaker 7.0 and newer versions.

NOTE A link icon displays on tabs in the XML Editor next to file names that are imported from and linked to another file or Flare project. However, if you are also using the built-in source control technology, the source control icons have a higher precedence and will therefore be displayed instead.

Importing a RoboHelp Project

You can create a project by importing a RoboHelp project.

How to Import a RoboHelp Project

1. Select **File > New Project > RoboHelp Project**.
2. In the dialog that opens, browse for and double-click the RoboHelp project file (MPJ or XPJ file) to be imported. The Import Project Wizard opens.
3. In the **Project name** field, type a name for the new Flare project that will be created after you import the RoboHelp project.
4. In the **Project folder** field, either accept the default location for the new project or click to browse for and select a folder.
5. Click **Next**.
6. (Optional) Select **Convert all topics at once** if you want Flare Desktop to immediately convert all of your topic files to XHTML.

   If you remove the check mark from the box, Flare Desktop imports the topic files as they are. When you try to open an imported topic in Flare Desktop, a message asks if you want to convert it to XML. Also, if this option is not selected, Flare Desktop will not import index keywords from the source files.
7. (Optional) Select **Convert inline formatting to CSS styles** if you want Flare Desktop to create new styles based on any "local" formatting that exists in the RoboHelp project files.

   > ☆ EXAMPLE If you have applied bold and italic formatting to some text (without using a style), Flare Desktop will create a new style based on that formatting.
8. Click **Next**.
9. Select a language for the project.
10. Click **Finish**. A message tells you that the project was converted successfully and will be opened.
11. Click **OK**.

Importing a Doc-To-Help Project

You can create a project by importing a Doc-To-Help project.

Before You Begin

Here are some important things to keep in mind when importing Doc-To-Help projects:

- You will need to build a target in your Doc-To-Help project before importing to Flare Desktop to ensure that all links have been updated. Flare Desktop's import process uses the Doc-To-Help database, which only updates links when Doc-To-Help projects are built.
- Flare Desktop will only convert HTML5 source documents from Doc-To-Help. Therefore, you will need to use the Doc-To-Help converter to convert all Word source documents. This includes any rich content variables authored in Word. See the online documentation for Doc-To-Help.

  > NOTE Keep in mind that once all documents in the project have been converted to HTML5, the project has to be managed directly within the Doc-To-Help application (C:\Program Files (x86)\MadCap Software\DocToHelp\DocToHelp.exe).

- If a Doc-To-Help source document is a multiple topic type, upon import it will be split into Flare topics by heading levels h1 through h5. All documents converted from Word to HTML5 are multiple topic types. The splitting is used to preserve the look of the online output with each heading level showing as a new page in the online TOC. To avoid this behavior, you can convert your multiple topics into single topics in Doc-To-Help before importing into Flare Desktop.
- Auto-generated TOCs are not in the database when they are imported. The TOC must be modified in order to be imported from Doc-To-Help to Flare Desktop. Even a simple change (e.g. moving a TOC topic up and then down to the same position) is considered a customization. This customization of the TOC will ensure that is imported from Doc-To-Help to Flare Desktop.

How to Import a Doc-To-Help Project

1. Select File > New Project > Doc-To-Help Project.
2. In the dialog that opens, browse for and double-click the Doc-To-Help project file (D2H file) to be imported. The Import Project Wizard opens.
3. Click Next.

   > NOTE If you want to import Doc-To-Help projects to a 64-bit version of Flare Desktop, you will need to download Microsoft Access Database Engine 2010 x64 edition. If you do not already have this add-in, Flare Desktop will prompt you to install it from the Microsoft Download Center.

4. In the Project name field, type a name for the new Flare project that will be created after you import the Doc-To-Help project.
5. In the Project folder field, either accept the default location for the new project or click to browse for and select a folder.
6. Click Next.
7. If you convert Word source documents to HTML5 source files in Doc-To-Help, and then build a target, stylesheets are created as a result and saved in the output folder. You can save those stylesheets in a different folder and then use this page of the wizard to point to them, bringing them into Flare Desktop in one merged CSS file.

   ### TO SAVE DOC-TO-HELP STYLESHEETS AND SELECT THEM WHEN IMPORTING TO FLARE DESKTOP

   a. Make a backup copy of your Doc-To-Help project.
   b. Open your Doc-To-Help project that contains Word source files.
   c. Select or create a NetHelp target and build the output.

d. Open the project output folder and browse to **[Project Name]\NetHelp\LinksExt**.

> **NOTE** The LinksExt folder might contain several stylesheets (separate ones for each topic), because each time a Word topic uses a style not already used in a previous topic, Doc-To-Help creates a new stylesheet to account for it. It might look something like this:
>
>
>

e. Move the LinksExt folder to a new location outside of the NetHelp parent folder, because this folder will be overwritten when you generate output again. Then rename the folder to whatever you want your imported stylesheet to be named.

f. In your Doc-To-Help project, click **Convert Multiple Documents to HTML5** and proceed with the wizard to convert all files.

g. Word closes the project when there are no DOC or DOCX files in the project. Therefore, in Windows navigate to your **Program Files\MadCap Software\DocToHelp** folder and double-click the **DocToHelp** EXE file. Then build a target to update links.

h. In Flare Desktop, import your Doc-To-Help project, and on the "Select CSS folders…" page of the wizard, click .

i. In the dialog that opens, locate and select the folder that you moved and renamed earlier in this process. Then finish importing the project. If the folder contains multiple stylesheets, Flare Desktop merges them into one CSS file.

8. Click **Next**.
9. Select an option for how to import links. You can import links as cross-references or as hyperlinks.
10. Select a language for the project.
11. Click **Finish**.

Doc-To-Help Features and Flare Equivalents

The following table shows many of the Doc-To-Help features and their equivalents in Flare. For a few of these features, the settings are not imported from Doc-To-Help to Flare Desktop.

Doc-To-Help Feature	Flare Feature	Notes/Limitations
Attributes	Conditions	Doc-To-Help allows conditions on platforms (e.g., all Word targets). However, Flare Desktop does not support that feature; therefore conditions on platforms are not imported.
Bookmarks	Bookmarks	
Carousel Widgets	Slideshows	
CodeHighlighter Widgets	Div Tags	
Collapsible Sections	Togglers	
Comments	Annotations	
CSS	Stylesheet	
Gallery Widgets	Slideshows	

Doc-To-Help Feature	Flare Feature	Notes/Limitations
Glossaries	Glossaries and Proxies	Glossary terms are added to a Flare glossary file. Glossary topics are changed to include Flare Desktop's Glossary proxy. Flare Desktop does not support images and text formatting in glossaries, so those elements are not included in the import.
Groups	Concepts and Concept Links (A-links)	Groups are similar to Flare's concepts, which can be used for a couple of things, including the creation of concept links (also called "See Also links" or "A-links"). When you import a Doc-To-Help project, groups are converted to concepts in a couple of different ways, depending on how they are created in Doc-To-Help: ■ If you insert a group in Doc-To-Help by dragging the topic from the Topics pane to the Groups pane, Flare Desktop converts the group to a concept and adds it at the very top of the topic. ■ If you insert a group in Doc-To-Help from the ribbon, you are adding it inline, as well as adding it to the Groups pane. Flare Desktop converts the group to a concept and adds it inline as well as at the very top of the topic. This means that when you have an A-link, that group might be listed twice in the output. Therefore, you may need to clean up your topics, removing the excess concepts. If you already have a group link in Doc-To-Help, it is imported as a concept link in Flare Desktop.

Doc-To-Help Feature	Flare Feature	Notes/Limitations
Inline Text: Expanded, Drop down, Pop Up	Expanding Text Drop-Down Text Text Popups	
Keywords	Index Keywords	Keywords are similar to Flare's index keywords, which can be used for a couple of things, including the creation of keyword links (also called "K-links"). When you import a Doc-To-Help project, keywords are converted to index keywords in a couple of different ways, depending on how they are created in Doc-To-Help: ■ If you insert a keyword in Doc-To-Help by dragging the topic from the Topics pane to the Index pane, Flare Desktop converts the keyword to an index keyword and adds it at the very top of the topic. ■ If you insert a keyword in Doc-To-Help from the ribbon, you are adding it inline, as well as adding it to the Index pane. Flare Desktop converts the keyword to an index keyword and adds it inline as well as at the very top of the topic. This means that when you have a K-link, that index keyword might be listed twice in the output. Therefore, you may need to clean up your topics, removing the excess index keywords. If you already have an index link in Doc-To-Help, it is imported as a keyword link in Flare Desktop.
Lightbox Widgets	Slideshows	

Doc-To-Help Feature	Flare Feature	Notes/Limitations
Link Tags	Bookmarks	
Note Widgets	Div Tags	
Plain Text Variables	Variables	Flare Desktop does not support conditioned multiple variable definitions. Those definitions are imported as multiple variable definitions.
Related Topics	Related Topics Links	
Rich Content Variables	Snippets	
Tabs Widgets	Div Tags	
Targets	Targets	Flare Desktop does not import any target settings.
Themes	Skins	Flare Desktop does not import any theme settings to skins.
TOCs	TOCs	If a TOC is not customized, it is not imported. An auto-generated TOC is not in the database when you import, so it is not considered customized. However, you can make a simple change in a TOC (e.g., move a TOC topic up and then down, not actually changing it). The TOC will then be considered customized and will import correctly.

Doc-To-Help Feature	Flare Feature	Notes/Limitations
Topic Contents Widgets	Mini-TOC Proxies	Although topic contents widgets in Doc-To-Help are similar to Flare Desktop's mini-TOC proxies, they are not identical. Therefore, you may see some discrepancies after the import conversion.

Importing CHM Files

You can create a project by importing an HTML Help (CHM) file.

How to Import an HTML Help (CHM) File

1. Select **File > New Project > HTML Help File (CHM)**.
2. In the dialog that opens, browse for and double-click the CHM file to be imported, then click **Next**.
3. In the **Project name** field, type a name for the new Flare project that will be created after you import the CHM file.
4. In the **Project folder** field, either accept the default location for the new project or click to find and select a folder. Then click **Next**.
5. (Optional) Select **Convert all topics at once** if you want Flare Desktop to immediately convert all of your topic files to XHTML.

   If you remove the check mark from the box, Flare Desktop imports the topic files as they are. When you try to open an imported topic in Flare Desktop, a message asks if you want to convert it to XHTML. Also, if this option is not selected, Flare Desktop will not import index keywords from the source files.
6. (Optional) Select **Convert inline formatting to CSS styles** if you want Flare Desktop to create new styles based on any "local" formatting that exists in the HTML Help file. Then click **Next**.

   > EXAMPLE If you have applied bold and italic formatting to some text (without using a style), Flare Desktop will create a new style based on that formatting.

   > NOTE This may result in dozens of new style classes being generated in your project.
7. Select a language for the project.
8. Click **Finish**.
9. Click **OK**.

Importing an HTML Help Project

You can create a project by importing an HTML Help project (HHP file).

How to Import an HTML Help Project

1. Select **File > New Project > HTML Help Project (HHP)**.
2. In the dialog that opens, browse for and double-click the HTML Help file (HHP file) to be imported. The Import Project Wizard opens.
3. In the **Project name** field, type a name for the new Flare project that will be created after you import the HTML Help project.
4. In the **Project folder** field, either accept the default location for the new project or click to browse for and select a folder.
5. Click **Next**.
6. (Optional) Select **Convert all topics at once** if you want Flare Desktop to immediately convert all of your topic files to XHTML.

   If you remove the check mark from the box, Flare Desktop imports the topic files as they are. When you try to open an imported topic in Flare Desktop, a message asks if you want to convert it to XHTML. Also, if this option is not selected, Flare Desktop will not import index keywords from the source files.
7. (Optional) Select **Convert inline formatting to CSS styles** if you want Flare Desktop to create new styles based on any "local" formatting that exists in the HTML Help project files.

   > ☆ EXAMPLE If you have applied bold and italic formatting to some text (without using a style), Flare Desktop will create a new style based on that formatting.
8. Click **Next**.
9. Select a language for the project.
10. Click **Finish**. A message tells you that the project was converted successfully and will be opened.
11. Click **OK**.

Importing DITA Files

Darwin Information Typing Architecture (DITA) file content is supported in Flare Desktop. DITA is an XML-based markup language with its own schema for authoring, producing, and delivering technical information. It is a standard of the Organization for the Advancement of Structured Information Standards (OASIS), and it consists of a set of design principles for creating "information-typed" modules at a topic level and for using that content in various delivery modes.

You can import DITA files in the a few ways.

How to Import DITA Files

1. Do the following, depending on how you are importing your files:

TO IMPORT INTO A NEW PROJECT

a. Select **Project > Import > DITA Document Set**.

   The Import DITA Wizard opens.

b. Select **Import into a new project**.

c. In the **Project name** field, type a name for the new Flare project that will be created after you perform the import.

d. In the **Project folder** field, either accept the default location for the new project or click ... to find and select a folder.

e. From the **Output Type** field, select the primary target for your project.

TO IMPORT INTO AN EXISTING PROJECT (WIZARD)

a. Select **Project > Import > DITA Document Set**.

   The Import DITA Wizard opens.

b. Select **Import into this project**.

TO IMPORT INTO AN EXISTING PROJECT (IMPORT EDITOR)

Do one of the following:

IF YOU DO NOT YET HAVE A DITA IMPORT FILE

a. Complete the steps for adding an import file.

b. Open the file in the DITA Import Editor.

IF YOU ALREADY HAVE A DITA IMPORT FILE

a. In the Project Organizer, expand the **Imports** subfolder.

b. Double-click the appropriate import file. The file opens in the DITA Import Editor to the right.

2. Do one of the following, depending on the part of the interface you are using:

   - **Wizard** Click **Next**.
   - **Import Editor** Select the **Source Files** tab.

3. Click .

4. Find and select the files you want to import. 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.

   You can select DITA or DITAMAP files.

> **NOTE** You cannot select multiple DITAMAP files from different folders during the same import process. You must first import the DITAMAP file(s) from one folder. Then in the project that is created as a result, you can import the DITAMAP file(s) from a second folder.

5. You can use the following options as necessary.

Option	Description
	This opens the file that is selected in the list.
Link Generated Files to Source Files	This creates a connection between the original files and the files that are created as a result of the import. This is useful if you want to continue editing the content outside of Flare Desktop, instead of editing in the Flare project. Flare Desktop recognizes when changes have been made to the source documents and reminds you to reimport the documents to ensure the Flare project also reflects the changes. If you use this option, a link icon is added to the top of a linked file in the Flare Desktop interface. This lets you know that you need to edit the source file, rather than editing this file. If you remove the connection to the source file, this icon no longer displays on the file. Please note that if you have bound the project to source control, the icons used for source control take precedence over the link icon.
	This removes the selected file(s) from the list.
	This moves the selected file higher in the list (if you have more than one file to import). The file at the top is used for the name of the content folder holding the imported topics in Flare Desktop. Also, the order determines how the imported files are arranged in the Flare TOC that is created as a result.
	This moves the selected file lower in the list (if you have more than one file to import).

6. Do one of the following, depending on the part of the interface you are using:
   - Wizard Click **Next**.
   - Import Editor Select the **Options** tab.

7. You can use the following options as necessary.
    - Import all Content files to one folder Select this option if you want all of the imported DITA file content to be placed in just one folder in the Content Explorer.
    - Auto-reimport before 'Generate Output' If you selected “Link Generated Files to Source Files” earlier in the wizard, you will likely make future content changes in the source files. When you make such changes, the source files need to be reimported into the project so that they can be included in the output. You have the option of reimporting the files manually. However, you can also tell Flare Desktop to do this for you automatically, so that you do not have to. Select this option if you want Flare Desktop to automatically reimport files when you attempt to build output.
    - Preserve ID attributes for elements Every element inside a DITA file has an ID. This ID is not needed in Flare Desktop. However, if you intend to send your output back out to DITA at any point, you can select this option to make sure the ID is preserved.
8. Do one of the following, depending on the part of the interface you are using:
    - Wizard Click Next.
    - Import Editor Select the Stylesheet tab.
9. Use this page to specify whether the imported topics should be associated with a stylesheet and/or styles from your DITA files.
    - Conversion Styles This opens the DITA Import Styles Editor, which lets you specify how to convert each property of the DITA elements. If you do not enter a property value, the value from the DITA file is used. If you enter a property value, it overrides the value from the DITA file. You can also use the dialog to import and export styles.

> NOTE When you import content from DITA files, there is a one-to-one conversion that occurs. For each DITA element in your file, a style class is created in Flare Desktop. For example, let's say you have a paragraph-level DITA element called "topictitle," after you import the file, a style class called "h1.topictitle" might be created in Flare Desktop. Or if you have a character-level DITA element called "cmdname," after you import the file, a style class called "span.cmdname" might be created as a result in Flare Desktop. If necessary, you can later edit those style classes in Flare Desktop. If you generate DITA output from your project, the style classes are converted back to DITA elements.

- Stylesheet If you already have a CSS file that you want to associate with the imported files, click the Stylesheet button. Then navigate to the stylesheet and select it.

10. Do one of the following, depending on the part of the interface you are using:
    - Wizard Click Finish. The Accept Imported Documents dialog opens. The files that will be created as a result of the import are listed on the left. A preview of each file can be seen to the right when you click the file.
    - Import Editor In the local toolbar click Import (if this is the first time importing files) or Reimport (if files have been imported previously). The Accept Imported Documents dialog opens. The files that will be created as a result of the import are listed on the left. A preview of each file can be seen to the right when you click the file.
11. When you are finished previewing the files to be created, click Accept.

Converting Author-it Files

MadCap Software has an Author-it® Converter, which lets you create a new Flare project based on Author-it Files. This utility uses the published XML output from Author-it and converts it to a Flare project, while maintaining all project and source files.

System Requirements

- MadCap Flare Desktop 10 or newer
- Microsoft .Net 4.5.1 (installed with the software if needed)
- Microsoft Visual C++ Redistributables (installed with the software if needed)
- Minimum 2048 MB memory (RAM)
- Minimum 150 MB available hard drive space (additional space depending on size of XML files to be converted)
- Microsoft Windows 7 or newer, 32- or 64-bit, including all required updates

How to Download and Install the Author-it Converter

1. Click the following to download and save the installation file locally:

   Download Author-it Converter Utility

2. Unzip the archive:
   a. Right-click **AuthorItConverterSetup.exe** and choose **Properties**.
   b. Verify the EXE file is not being blocked (located on the **General** tab). This often happens with network and Windows security.
      - If the option to unblock the EXE is available, check the option and click **OK**.
      - If no option to unblock exists, the above steps are not needed.
3. Run **AuthorItConverterSetup.exe** with elevated privileges (Run as Administrator).
4. Follow the prompts to install the utility.

How to Use the Author-it Converter

1. From the MadCap Software program group, launch **Author-it to Flare Converter**.
2. Select the location and the Author-it XML file by clicking the browse button […].
3. Select a location where the Flare project should be saved by clicking the browse button […].
4. Select **Content Path Options** and choose one of the following:
    - **Author-it** Keeps the existing folder structure outlined in the XML
    - **Flat** Puts all topics at the root level under the Content folder
    - **Condensed** Removes all empty folders from the XML structure; maintains only folders with topics in the Content Explorer
5. Click **Convert**. The utility begins. A log report will be sent to the Flare project folder for troubleshooting purposes.
6. When the conversion process is complete, click **Yes** to open the folder.
7. Double-click the **project.flprj** file to open the project in Flare Desktop.

How Elements are Converted From Author-it to Flare

Certain elements from Author-it are converted to their closest counterparts in Flare. The following table describes this.

Author-it Element	Flare Element	Notes
Context IDs	Context IDs	Context IDs and values are converted to alias and header files.
Embedded topics	Converted to snippets	These are placed in Resources folder in Flare Desktop.

Author-it Element	Flare Element	Notes
Glossaries	Glossaries	
Images	Images	These are placed in Resources folder in Flare Desktop.
Index keywords	Index keywords	
Styles	Styles	Stylesheets are placed in Resources folder in Flare Desktop.
Table of contents of Author-it books	Converted to topics	
Variables	Variables	Variables and all permutations are converted. Variables embedded in variables are not supported in Flare Desktop at this time. In this case, each definition is added as a permutation of the variable.

What's Noteworthy?

NOTE The XML files from Author-it are from the Publish option in the Author-it software.

NOTE Topics without headings will be named "Topic####.htm" where the # is the Object ID of the topic in the XML.

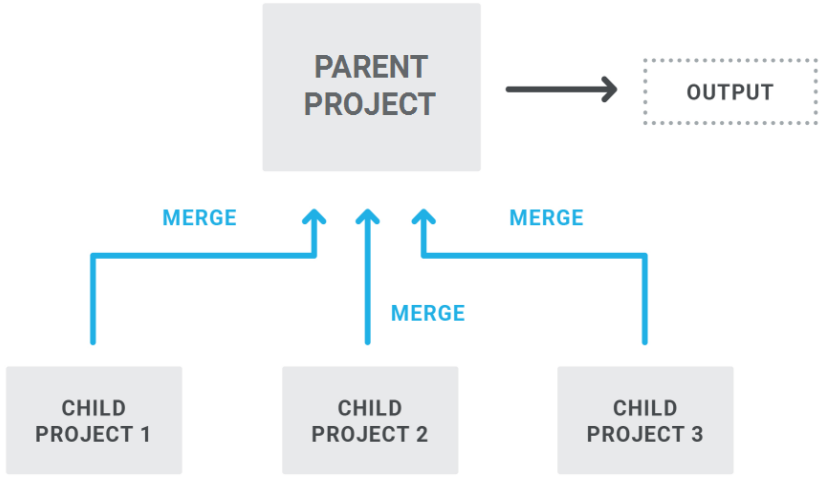
CHAPTER 2

Merging Projects

Supported In:

NOTE This is supported in HTML5 Tripane output, but not in HTML5 Side Navigation, Top Navigation, or skinless output.

To merge output means to connect multiple projects in such a way that the source files are combined into a single online output. The merging is based on the table of contents (or browse sequence) in one parent project, where links point to one or more child projects.



This chapter discusses the following:

Runtime Merging Flare Projects Using Targets 118
Runtime Merging Output From HTML Help Projects (CHM Files) ... 122
Runtime Merging Server-Based HTML5 Output 129

Runtime Merging Flare Projects Using Targets

Use this merging method if you have access to all of the Flare project files to be merged. You can merge projects together by linking targets with the same output type (e.g., linking Microsoft HTML Help to Microsoft HTML Help, linking WebHelp to WebHelp).

How to Use Targets to Merge Multiple Flare Projects at Runtime

1. Open the TOC in the Flare project that will serve as the parent project.

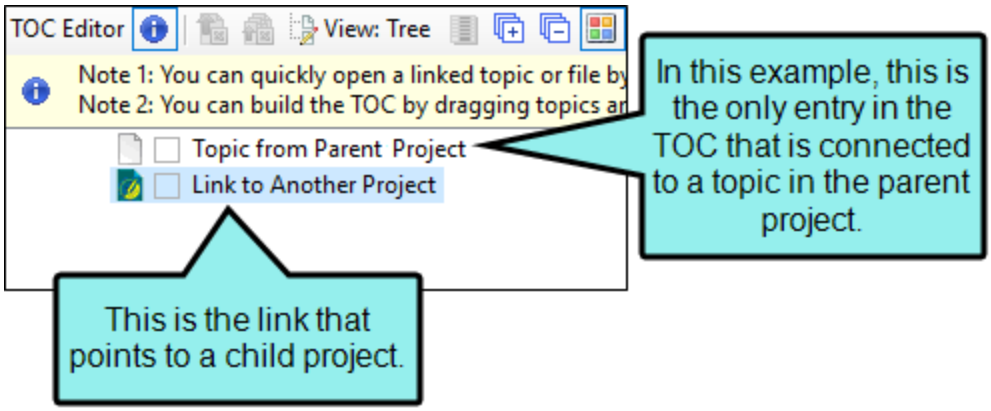
   > NOTE You can also merge projects by linking them from a browse sequence, as well as from a TOC. If you want to do this, simply follow these same steps after opening your browse sequence.

2. In the TOC Editor, select the TOC entry or book where you want to link the output from another Flare project. (The TOC of the linked project will be inserted at that spot in the parent TOC.)
3. In the local toolbar of the TOC Editor, click . The Properties dialog opens.
4. Select the **General** tab.
5. Click **Select Flare Project and Target**. The Link to Flare Project and Target dialog opens.
6. Do one of the following:
   - Click **Browse for Project**. Then click **Project File** and find/select a Flare project to which you want to link.

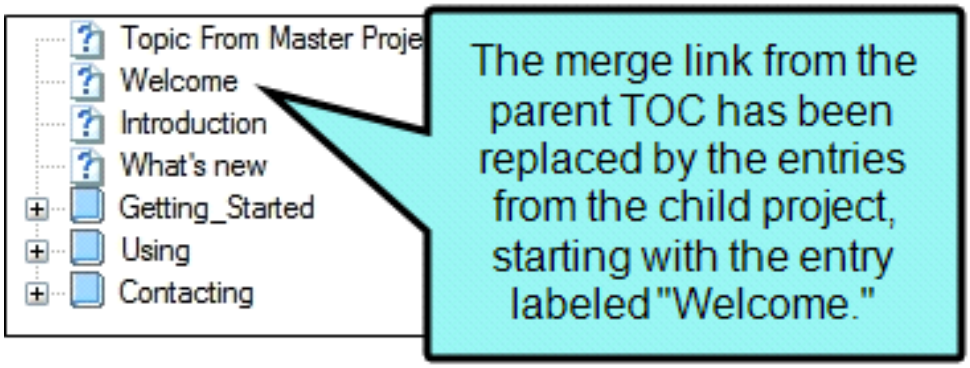
     OR
   - Click **Select Recent Project**. Then select a recently opened Flare project from the list on the right.
7. From the **Select Target** field, choose a specific target in the Flare project. Make sure you select a target that uses the same output type (e.g., Microsoft HTML Help or WebHelp) as the target that you will build in the current project.

8. Click **OK**.
9. (Optional) If you want the merged TOC to replace the entry that you selected, do the following.
    a. Select the **Advanced** tab.
    b. Click the check box labeled **When merging, replace node with merged TOC**.

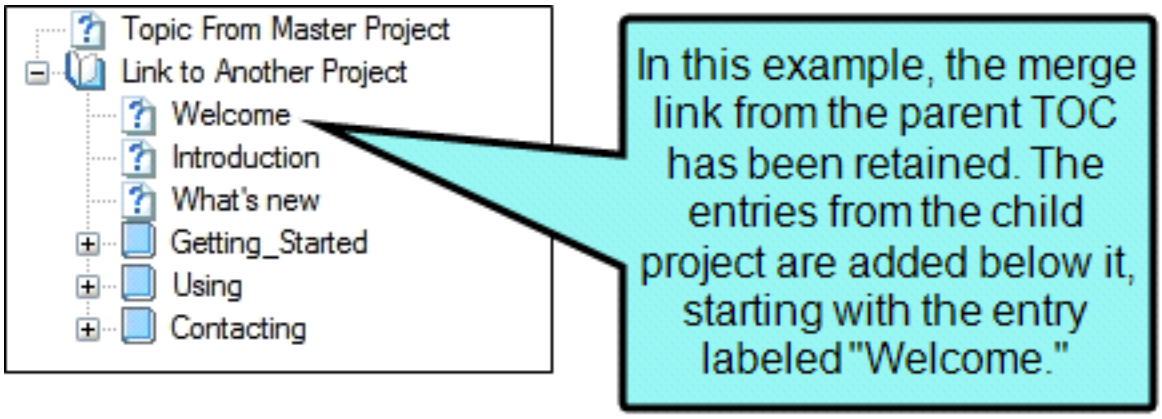
For example, you might have a TOC in your parent project that looks like this:



If you select the option in this step to replace the node, the merged TOC would look like this in the output:



And if you do not select this option, your merged TOC would look like this:



10. In the Properties dialog, click **OK**.
11. Build the output for the target in your parent project. The output files for the projects are merged. When you open the TOC in the output, you will see the integrated TOC from the linked project.

NOTE There are occasions when projects cannot be merged because the file name is the same in two or more of the linked projects (e.g., multiple WebHelp projects all named "MyWebProject.mcwebhelp" or multiple Microsoft HTML Help projects all named "MyHtmlHelp.chm"). The way to solve this dilemma is to make sure each linked project has a different output file name. To do this: (1) open the target, (2) select the **General** tab in the Target Editor, and (3) enter a unique name in the **Output File** field.

NOTE If you are working with HTML Help and import a RoboHelp project that has been merged with other CHM files, the linked CHM files are placed in a special subfolder in the Content Explorer (Resources > CHMSupport).

NOTE If you have previously merged Flare projects with WebHelp outputs and then decide to generate WebHelp Plus output from the parent project instead, you must make sure that the child projects linked to the parent contain at least one WebHelp Plus target each. Even if you keep the link from the parent project to a WebHelp target in the child, the child project must also have a WebHelp Plus target.

NOTE If you merge projects, synonym files will remain separate in each project. For example, if you create synonyms in Project A but not in project B, only the topics from Project A will use the synonyms when users perform searches in the output.

NOTE You can merge HTML Help so that the navigation (table of contents, index, search) for each CHM file is displayed, regardless of which CHM file you open (parent or child). This can be done in a couple of ways, depending on whether you have access to all of the Flare projects or to the CHM files only. See "Displaying Merged Navigation in HTML Help Child Outputs" on page 127.

Runtime Merging Output From HTML Help Projects (CHM Files)

Use this merging method if you are developing Microsoft HTML Help (a CHM file) and you want to merge your output with another CHM file. This method is useful, for example, if another author is working on the external Microsoft HTML Help project to which you are linking and you only have access to the other CHM file (not the project files).

You can merge your output with another CHM file that you have already brought into your project (perhaps via the external resources feature), or you can select a CHM file located elsewhere, in which case a copy of it is added to your project.

How to Merge Output From HTML Help Projects

1. Open the TOC in the Flare project that will serve as the parent project.

   > NOTE You can also merge projects by linking them from a browse sequence, as well as from a TOC. If you want to do this, simply follow these same steps after opening your browse sequence.

2. Do one of the following:

   - In the TOC Editor, select the TOC entry or book where you want to link the output from the child HTML Help project. (The TOC of the linked CHM file will be inserted at that spot in the parent TOC.)

     OR

   - If the CHM file already exists somewhere in your project, you can open the Content Explorer and drag the CHM file to the location in the parent TOC where you want to place it. If you use this method, the link will not point to any particular topic in the CHM file. Also, if you use this method, you do not need to complete the rest of the steps below.

3. In the local toolbar of the TOC Editor, click . The Properties dialog opens.
4. On the **General** tab, click **Select HTML Help**. The Link to HTML Help dialog opens.

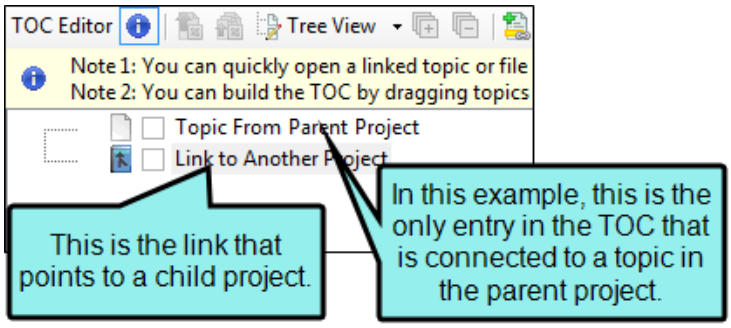
5. Do one of the following:
   - **If the child CHM file is already in your project** Select **Project Files** and then use the area below to navigate to the file that you want to link to and select it. By using the buttons in the local toolbar, you can view all files in a list, view files in their folder structure, and use other options.

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. The folder is shown on the left side, and the files and subfolders within it are shown on the right.

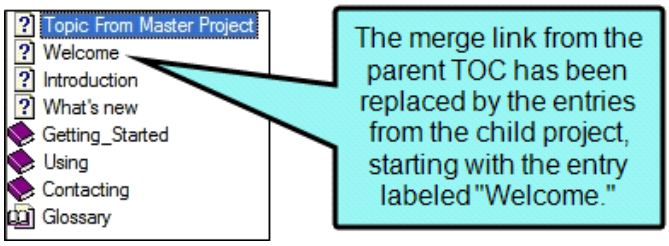
   - **If the child CHM file is not yet in your project** Select **Import Existing**. In the dialog that opens, find and double-click the child CHM file. Then from the drop-down—which displays "(root folder)" by default, you can select a specific content folder in your project to place the child CHM file.
6. (Optional) If you want to point to a specific topic in the child CHM file, in the **Topic** field click . In the dialog that opens, find and double-click the topic that you want to link to.

   If you use this option, only the specified topic will be included in the TOC, as opposed to the entire TOC of the child CHM. However, even though just one topic will be included in the merged TOC, the other topics in it will still be included in the output and you can get to them through other means (e.g., clicking hyperlinks).
7. Click **OK** in the Link to HTML Help dialog.
8. If you imported a child CHM file, the Copy to Project dialog opens. You can select **Keep file synchronized (create mapping)**. This creates a link (map) between the original file and the copy being added to your project. Then click **OK** in the Copy to Project dialog.
9. (Optional) If you want the merged TOC to replace the entry that you selected, do the following.
   a. Select the **Advanced** tab.
   b. Click the check box labeled **When merging, replace node with merged TOC**.

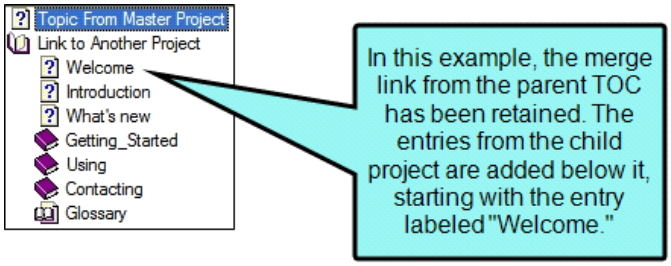
For example, you might have a TOC in your parent project that looks like this:



If you select the option in this step to replace the node, the merged TOC would look like this in the output:



And if you do not select this option, your merged TOC would look like this:



10. In the Properties dialog, click **OK**.

> NOTE There are occasions when projects cannot be merged because the file name is the same in two or more of the linked projects (e.g., multiple WebHelp projects all named "MyWebProject.mcwebhelp" or multiple Microsoft HTML Help projects all named "MyHtmlHelp.chm"). The way to solve this dilemma is to make sure each linked project has a different output file name. To do this: (1) open the target, (2) select the **General** tab in the Target Editor, and (3) enter a unique name in the **Output File** field.

NOTE If you are working with HTML Help and import a RoboHelp project that has been merged with other CHM files, the linked CHM files are placed in a special subfolder in the Content Explorer (Resources > CHMSupport).

NOTE You can also link to CHM files from the TOC in all web-based outputs (HTML5, WebHelp, WebHelp Plus). However, linking to a *specific topic* within the CHM is not supported in these outputs. See "Linking to CHM Files" on the next page.

NOTE You can merge HTML Help so that the navigation (table of contents, index, search) for each CHM file is displayed, regardless of which CHM file you open (parent or child). This can be done in a couple of ways, depending on whether you have access to all of the Flare projects or to the CHM files only. See "Displaying Merged Navigation in HTML Help Child Outputs" on page 127.

Linking to CHM Files

You can include a CHM file in the TOC in your project so that it can be opened in your output.

If you do this when generating Microsoft HTML Help, the linked CHM will be merged with the TOC in the project.

If you do this when generating one of the web-based outputs (HTML5, WebHelp, WebHelp Plus), the user will be able to download the CHM.

Regardless of the type of online output you are generating, you can find the steps for linking to a CHM file in the following topic: "Runtime Merging Output From HTML Help Projects (CHM Files)" on page 122.

NOTE Links to CHM files can be configured in two ways. First, links can point to the CHM file in general. Second, they can point to a *specific topic* within the CHM. The first method is supported in all of the online outputs mentioned above. The second method is supported only in Microsoft HTML Help output.

Displaying Merged Navigation in HTML Help Child Outputs

You can merge HTML Help so that the navigation (table of contents, index, search) for each CHM file is displayed, regardless of which CHM file you open (parent or child). This can be done in a couple of ways, depending on whether you have access to all of the Flare projects or to the CHM files only.

How to Display Merged Navigation in HTML Help—Access to All Flare Projects

1. Open the target to be used as the parent CHM.
2. On the Advanced tab of the Target Editor, select Display merged navigation in HTML Help.
3. Click to save your work.
4. Follow the steps for merging based on HTML Help targets. See "Runtime Merging Flare Projects Using Targets" on page 118.
5. Generate the parent HTML Help target.

   The parent CHM file and all child CHM files are located in the same output folder, and when you open any of those CHM files, you can see the navigation for any of the other outputs.

How to Display Merged Navigation in HTML Help—Access to CHM Files Only

Use this method if you *do not* have access to all of the Flare projects, but you *do* know the names of the other CHM files that will be created. This method is more of a manual setup and is useful if you are part of a team where different authors have access to different Flare projects that need to be merged. This method also lets you add or remove child CHM files without needing to recompile the parent project.

1. The author for each project (parent *and* child) places a simple TXT file named *merge.txt* in the same folder where the Flare project file (.flprj) is located. This TXT file can be created with Notepad and should simply list the names of all CHM files to be included in the merged output (one on each line), with the name of the parent CHM appearing first.

   ☆ EXAMPLE

   MyParent.chm

   MyFirstChild.chm

   MySecondChild.chm

   MyThirdChild.chm

2. The author for each child project generates his output and provides the author of the parent project with the CHM file(s).
3. The author for the parent project brings the child CHM files into the parent project and follows the steps for merging based on CHM files. See "Runtime Merging Output From HTML Help Projects (CHM Files)" on page 122.
4. The author for the parent project generates the main HTML Help target.

   The parent CHM file and all child CHM files are located in the same output folder, and when you open any of those CHM files, you can see the navigation for any of the other outputs.

Runtime Merging Server-Based HTML5 Output

This is an easy way to merge the output from multiple HTML5 Flare targets into one Help system. These targets can be originated from the same Flare project or from different Flare projects. You simply place the output files in the correct location on the server (i.e., within your parent project's AutoMerge folder). Flare Desktop then automatically merges the output from all of the targets when users access the Help. From the end user's perspective, the results are seamless, appearing as one large Help system. All of the TOCs, browse sequences, indexes, glossaries, and search capabilities for the projects are merged.

> NOTE Flare's HTML5 Side and Top Navigation skins do not support runtime project merging.

The following information is necessary only for server-based output. If you do not require server-based HTML5 output, see "Runtime Merging Flare Projects Using Targets" on page 118 instead.

Process

1. Enable HTML5 Server-Based Output If you want to take advantage of the advanced server-side features of HTML5 (i.e., automatic runtime project merging, server-side search, searching of non-XHTML files), you must enable HTML5 server-based output. This includes performing the following tasks: (1) installing Microsoft Internet Information Services (IIS) and ASP.NET, (2) setting up the HTML5 target and generating/publishing, (3) configuring IIS on the production server, (4) starting Microsoft Indexing Service or Microsoft Windows Search (depending on the operating system), and (5) enabling HTML5 search.For more information see the Help system.
2. Determine Parent Output Decide which of your project outputs will serve as the parent. This is the main output that users will open. All other outputs will be accessed from that output, although it will appear as one large Help system to end users.
3. (Optional) Specify TOC and/or Browse Sequence Locations for Automerge By default, the TOCs and browse sequences from the child outputs will be appended at the end of the parent output's TOC and browse sequence. However, if you want them to be appended somewhere within the parent output's TOC or browse sequence, you can specify the exact location.See "Specifying the Automerge Location in a TOC for HTML5" on page 134 and "Specifying the Automerge Location in a Browse Sequence for HTML5" on page 132.
4. (Optional) Specify Order of Merged Outputs When you automerge HTML5 outputs, the secondary outputs are merged to the parent project's table of contents (TOC) and/or browse sequence in alphabetical order. However, you can override this default configuration and merge the secondary outputs in any order that you like.See "Specifying the Order of Automerged HTML5 Outputs" on page 136.
5. Generate Outputs Build the output for each of the targets to be included in the automerge. You must use HTML5 for all of the targets.

NOTE If you are testing HTML5 server-based output on your local machine, you need view the output at least one time. When you view HTML5 output on your local computer, you need to create a special folder called "MCPreview" within your "C:\Inetpub\wwwroot" folder. Place a copy of your HTML5 output files in it. This enables you to test the advanced features of HTML5 on your local machine. When testing the automerge feature on your computer, you need to place the secondary ("child") outputs in the AutoMerge subfolder at this location (as opposed to the output folder that was generated where your Flare project is located).

NOTE If you are testing HTML5 server-based output on your local machine, you may need to wait a few minutes after viewing the output for the Indexing Service to fully scan your files. Otherwise, you may not immediately see the effects of the scan (e.g., searches of non-XHTML files, incorporation of merged output files) in the output. If you avoid performing other tasks during this period, the scanning of the files will be completed more quickly.

NOTE If you want to test HTML5 server-based output on your local computer, the advanced search features of HTML5 are not operable.

Specifying the Automerge Location in a Browse Sequence for HTML5

You can determine where other Flare project outputs are merged relative to your parent project's browse sequence if you are generating HTML5 server-based output and you are publishing the files to a web server running Microsoft IIS.

By default, the other HTML5 server-based outputs will be merged at the end of your parent project's browse sequence. However, you can use the following steps to select one of the available options to override this placement.

How to Specify the Automerge Location in a Browse Sequence

1. Open the browse sequence in the Flare project that will serve as the parent project.
2. Do one of the following:
    - If you want to merge the other outputs in relation to one of the existing entries in the browse sequence (e.g., before it, after it), select that entry (whether it is an individual item or a book).

      OR

    - If you want to merge the other outputs at the location of an entry that is not linked to any other file, and you want to provide a label to indicate the location of the merge, create a new browse sequence item. To do this:
        a. Place your cursor in the browse sequence where you want to add the new item.
        b. Click .
        c. Press F2.
        d. Replace the default text with new text.
        e. Press ENTER.
        f. If necessary, use the arrow buttons in the local toolbar to position the new entry in the browse sequence.
3. In the local toolbar of the Browse Sequence Editor, click . The Properties dialog opens.
4. Select the Advanced tab.

5. In the Server-based Automerge field, select one of the following:
    - Before The automerge will occur immediately before the selected browse sequence entry.
    - After The automerge will occur immediately after the selected browse sequence entry.
    - First Child The automerge will occur at the first location directly after the selected browse sequence book (i.e., before any other entries within the book). If you use this option on a simple browse sequence entry instead of a book, the entry will automatically become a book once the outputs are automerged.
    - Last Child The automerge will occur at the last location after the selected browse sequence book (after the last entry within the book). If you use this option on a simple browse sequence entry instead of a book, the entry will automatically become a book once the outputs are automerged.
    - Replace The automerge will occur at the location of the browse sequence entry where you have specified this option. It would replace any links that might otherwise be applied to that entry. You might use this option, for example, if you want to create a new entry in the parent browse sequence so that you can add a label at the point where the automerge occurs.
6. In the Properties dialog, click OK.
7. Click to save your work.

Specifying the Automerge Location in a TOC for HTML5

You can determine where other Flare project outputs are merged relative to your parent project's TOC if you are generating HTML5 server-based output and you are publishing the files to a web server running Microsoft IIS.

By default, the other HTML5 server-based outputs will be merged at the end of your parent project's TOC. However, you can use the following steps to select one of the available options to override this placement.

How to Specify the Automerge Location in a TOC

1. Open the TOC in the Flare project that will serve as the parent project.
2. Do one of the following:
   - If you want to merge the other outputs in relation to one of the existing entries in the TOC (e.g., before it, after it), select that entry (whether it is an individual item or a book).

     OR
   - If you want to merge the other outputs at the location of an entry that is not linked to any other file, and you want to provide a label to indicate the location of the merge, create a new TOC item. To do this:
     a. Place your cursor in the TOC where you want to add the new item.
     b. Click .
     c. Press F2.
     d. Replace the default text with new text.
     e. Press ENTER.
     f. If necessary, use the arrow buttons in the local toolbar to position the new entry in the TOC.
3. In the local toolbar of the TOC Editor, click . The Properties dialog opens.
4. Select the Advanced tab.

5. In the Server-based Automerge field, select one of the following:
    - Before The automerge will occur immediately before the selected TOC entry.
    - After The automerge will occur immediately after the selected TOC entry.
    - First Child The automerge will occur at the first location directly after the selected TOC book (i.e., before any other entries within the book). If you use this option on a simple TOC entry instead of a book, the entry will automatically become a book once the outputs are automerged.
    - Last Child The automerge will occur at the last location after the selected TOC book (after the last entry within the book). If you use this option on a simple TOC entry instead of a book, the entry will automatically become a book once the outputs are automerged.
    - Replace The automerge will occur at the location of the TOC entry where you have specified this option. It would replace any links that might otherwise be applied to that entry. You might use this option, for example, if you want to create a new entry in the parent TOC so that you can add a label at the point where the automerge occurs.
6. In the Properties dialog, click OK.
7. Click to save your work.

Specifying the Order of Automerged HTML5 Outputs

When you automerge HTML5 outputs, the secondary outputs are merged to the parent project's table of contents (TOC) and/or browse sequence in alphabetical order. However, you can override this default configuration and merge the secondary outputs in any order that you like. See "Runtime Merging Server-Based HTML5 Output" on page 129.

☆ EXAMPLE You have a parent project with a target named "Main" and three smaller projects with targets named "First Child," "Second Child," and "Third Child," respectively. If you place the three smaller project outputs in the AutoMerge subfolder where "Main" is published, their TOCs will be appended to the parent project's TOC in the following order:

1. First Child
2. Second Child
3. Third Child

But what if you want "Third Child" to be appended first? You can use the steps in this topic to position it above the other targets. Therefore, the result would be:

1. Third Child
2. First Child
3. Second Child

Now let's say that you add two more targets (called "Final Child" and "Another Child") to the AutoMerge folder. If you do not adjust your custom order, Flare Desktop will automerge these outputs in alphabetical order at the end of your custom order. Therefore, the final result would be:

1. Third Child
2. First Child
3. Second Child
4. Another Child
5. Final Child

How to Specify the Order of Automerged Outputs

1. Create an XML file and name it SortOrder.xml. You can do this by opening an editor such as Notepad. When you save the file, type the xml file extension at the end of the name.
2. Enter the following code into the blank file.

   ```
   <?xml version="1.0" encoding="utf-8"?>

   <SortOrder>

   <Item>ProjectA</Item>

   <Item>ProjectB</Item>

   <Item>ProjectC</Item>

   </SortOrder>
   ```

3. Replace "ProjectA," "ProjectB," and "ProjectC" with the names of your own child targets. You can add or remove line items as necessary.

   If you were to use the example at the top of this topic, you would enter the following.

   ```
   <?xml version="1.0" encoding="utf-8"?>

   <SortOrder>

   <Item>Third Child</Item>

   <Item>First Child</Item>

   <Item>Second Child</Item>

   </SortOrder>
   ```

4. Save the file.
5. Copy and paste the SortOrder.xml file into the AutoMerge directory of your published HTML5 output. This file sits beside the child output folders that you are using for the automerge.

CHAPTER 3

Exporting Projects

You can export projects, thus creating copies of them.

This chapter discusses the following:

Adding an Export Project File 139

Exporting Projects 140

Exporting Projects Using the Command Line 156

Adding an Export Project File

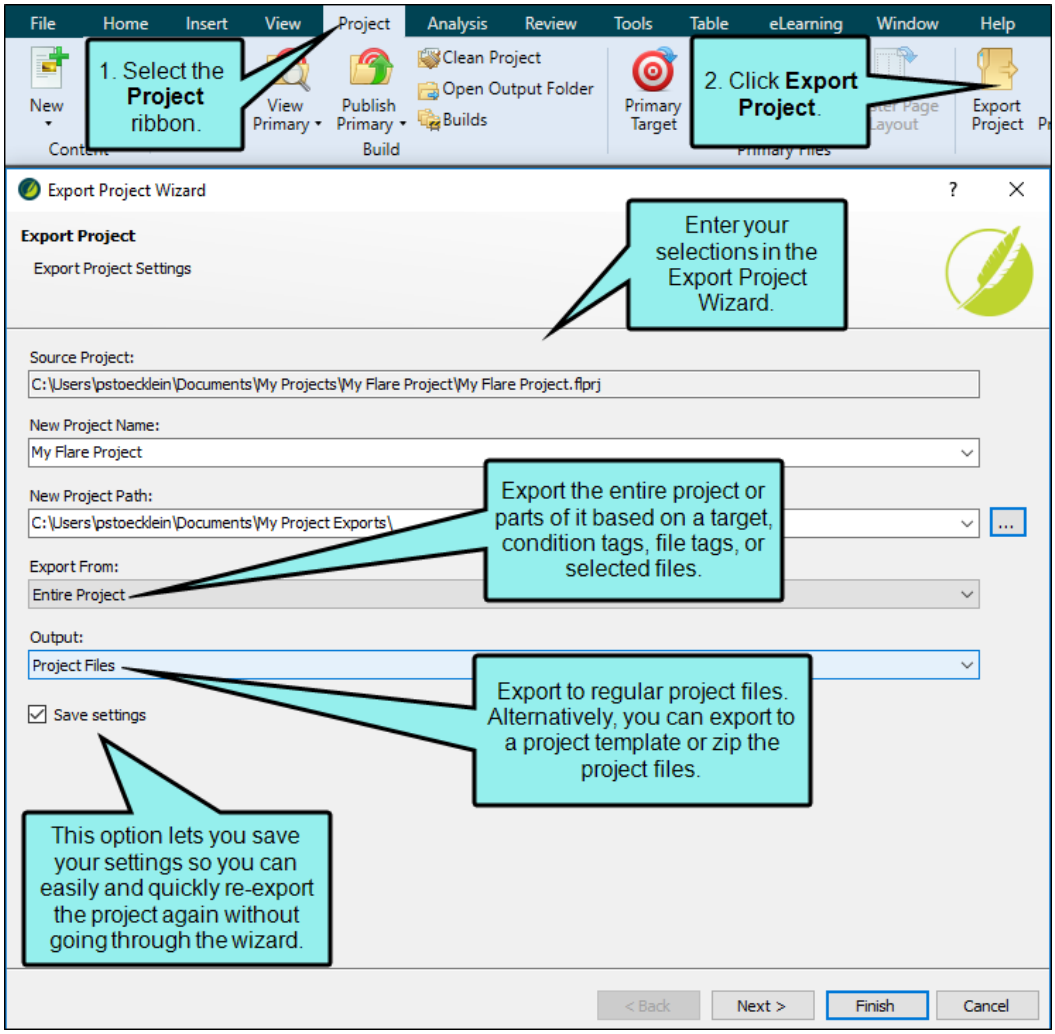
The following steps show you how to add an export project file, which is used to export projects.

How to Add an Export Project File

1. Select **Project > New > Add Export Project File**. The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Export Project File** is selected.
3. In the **Source** area, choose to create the new file based on a template or an existing file.
    - **New From Template** Choose either a factory template file or one of your own custom template files as a starting point. The new file will take on all of the settings contained in the template. If you want to use the factory template provided by Flare Desktop, expand the **Factory Templates** folder and click on a template file. If you want to use your own custom template file, expand the appropriate folder and click on a file. For more information about templates, see the Help system.
    - **New From Existing** Choose an existing file of the same type as a starting point for your new file. As with template files, your new file will take on all of the settings contained in the file you select. To use this option, click ..., use the Open File dialog to find a file, and double-click it.
4. In the **File Name** field, type a new name for the export file.
5. (Optional) If you want to apply condition tags to the file, expand the **Attributes** section at the bottom of the dialog. Next to the **Condition Tags** field, click ... and select the conditions you want to apply. Click **OK**.
6. (Optional) If you want to apply file tags, expand the **Attributes** section at the bottom of the dialog. Next to the **File Tags** field, click ... and select the file tags you want to apply. Click **OK**.
7. Click **Add**. The export file is added to the Exports folder in the Project Organizer. The Export Project File Editor opens to the right.

Exporting Projects

You can export an entire Flare project, or parts of one, to another location. One reason you might want to use this feature is to quickly and easily make a copy of projects and archive them, especially if you have an extremely large Flare project and need to archive only parts of it. Another use for this feature is translation. If you only need a portion of a parent project to be translated, you don't want to send the translator all of the files, but rather a smaller version of the project containing only the files requiring translation.



You can export a project using the Export Project Wizard to guide you. Alternatively, you can add an export file to your project and use the Export Project File Editor (see the Help system).

How to Export a Project via the Export Project Wizard

1. Open a project.
2. Select **Project > Export Project**. The Export Project Wizard opens.
3. In the **New Project Name** field, enter a name for the exported project.
4. (Optional) The New Project Path field is automatically populated with the default location (Documents\My Project Exports). If you want to export the project to a different location, click and select the folder you want.

   > NOTE If you select Project Template below in step 6, this area is grayed out because the project files will automatically be placed in your templates folder.

5. In the **Export From** drop-down, select one of the options.
   - **Entire Project** This option makes a copy of the entire project, including all folders, subfolders, and files.
   - **Using Target** This option uses the same workflow as that used for generating a target. When you select a particular target, the same files and content that would be included in generated output are included in the exported project.
   - **Using Conditions** This option exports only files and content affected by condition tags that you tell Flare Desktop to include or exclude.
   - **Using File Tags** This option exports only files affected by file tags that you tell Flare Desktop to include or exclude. This method can be especially useful for translation purposes, exporting only files that are marked with a certain file tag status (e.g., Ready for Translation).
   - **Select Files** This option exports only specific files that you select. You can choose any files stored in the source project's Content Explorer and Project Organizer.

If you have a primary TOC, page layout, or stylesheet set in the Project Properties dialog and include those files in an export, the settings in the Project Properties dialog will be preserved. If you do not include those files in an export, default files are added to the exported project to allow it to work, and the settings in the Project Properties dialog are set to default.

> NOTE If Flare Desktop detects any missing files (e.g., stylesheet, template page, target) that are necessary in order to properly open the exported project, default files are added. For example, if no target file is added directly as a result of your selection, an HTML5 target is added by default.

6. In the **Output** drop-down, select one of the options.
    - **Zip File** This option packages the project files into a single zip file with an .flprjzip extension and places it in a location that you select. The default location is Documents\My Project Exports.
    - **Project Files** This option simply exports the project files to a location that you select. The default location is Documents\My Project Exports.
    - **Project Template** This option exports the project files to your templates folder (e.g., Documents\My Templates\Projects). By being placed in this location, the project files become available as a template selection when you create a new project.

7. (Optional) Select **Save settings** if you want to retain your settings for future re-exports. The export project file (.flexp) is stored in the Exports folder in the Project Organizer. When you open this export file, the Export Project File Editor opens. This editor lets you change any of your settings (if necessary) and export the project again (see the set of steps below for exporting a project using the Export Project File Editor).
8. Click **Next**.
9. If you are exporting based on a target, click in the **Target** drop-down field and select the appropriate target from the source project.
10. (Optional) You can select one or both of the following:
    - **Convert variables to text** Select this option if you want all relevant variables to be converted to text.
    - **Convert snippets to text** Select this option if you want all relevant snippets to be converted to text.
11. If you are exporting an entire project or using a target, you can skip to step 12. Otherwise, if you made another selection in step 5, click **Next** and complete the options as necessary.

IF USING CONDITIONS

Use either the Basic or Advanced section to tell Flare Desktop which condition tags to include and which to exclude from the export.

By default when you open this page, the **Basic** option is selected. You can click **Advanced** to switch to that mode if you are experienced at writing expressions by hand. While the Basic section is easier for most people to use, it is also more limited in the type of expressions it can create.

With the Basic method, all of your work is done in the top half of the user interface, by just selecting options. On the other hand, with the Advanced method, most of your work is done in the bottom portion of the user interface by manually entering text.

For details and examples on using each of these methods, see the Help system.

> NOTE In order for this method to work, make sure you have already applied the appropriate condition tags to files and content in the project.

TIP If you are an experienced user and want to use the Advanced mode, you might find it helpful to begin with the Basic mode to create the initial expression and then switch to Advanced when you are ready.

NOTE The Finish button is not enabled until you create at least one condition expression on this page.

IF USING FILE TAGS

a. In the **Tag Type** field, you can select a specific file tag set or choose to display all file tags to the right.

b. Use either the **Basic** or **Advanced** section to tell Flare Desktop which file tags to include (e.g., Ready for Translation) and which to exclude from the export.

   By default when you open this page, the **Basic** option is selected. You can click **Advanced** to switch to that mode if you are experienced at writing expressions by hand. While the Basic section is easier for most people to use, it is also more limited in the type of expressions it can create.

   With the Basic method, all of your work is done in the top half of the user interface, by just selecting options. On the other hand, with the Advanced method, most of your work is done in the bottom portion of the user interface by manually entering text.

   The process for creating file tag expressions is essentially the same as that for condition tag expressions.

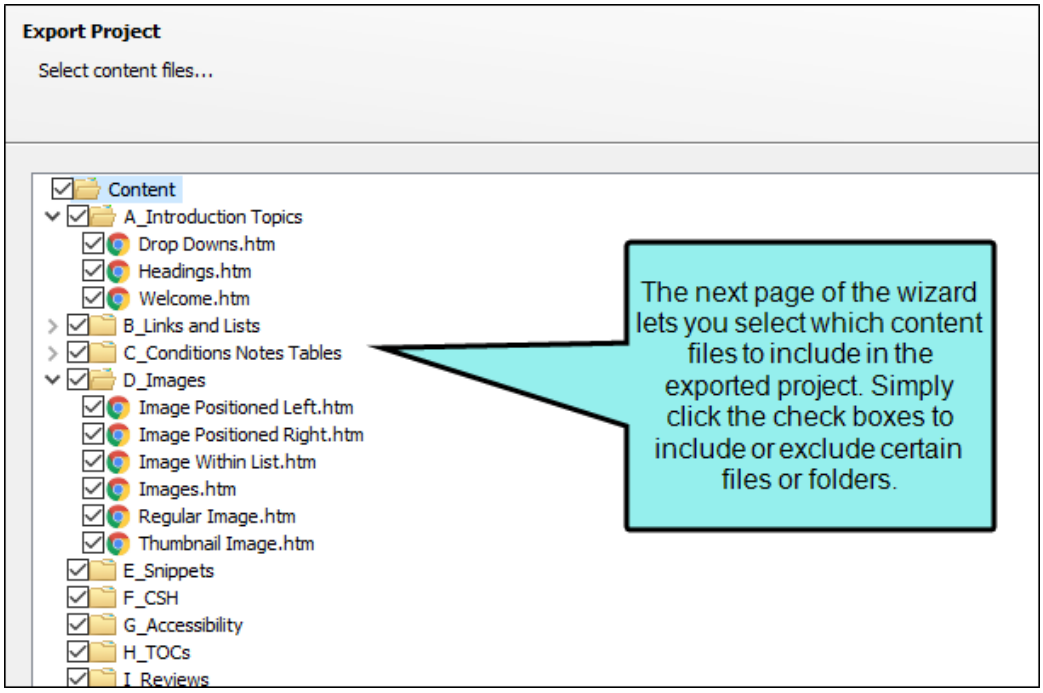
   NOTE In order for this method to work, make sure you have already associated the appropriate file tags with files in the project.

   TIP If you are an experienced user and want to use the Advanced mode, you might find it helpful to begin with the Basic mode to create the initial expression and then switch to Advanced when you are ready.

NOTE The Finish button is not enabled until you create at least one file tag expression on this page.

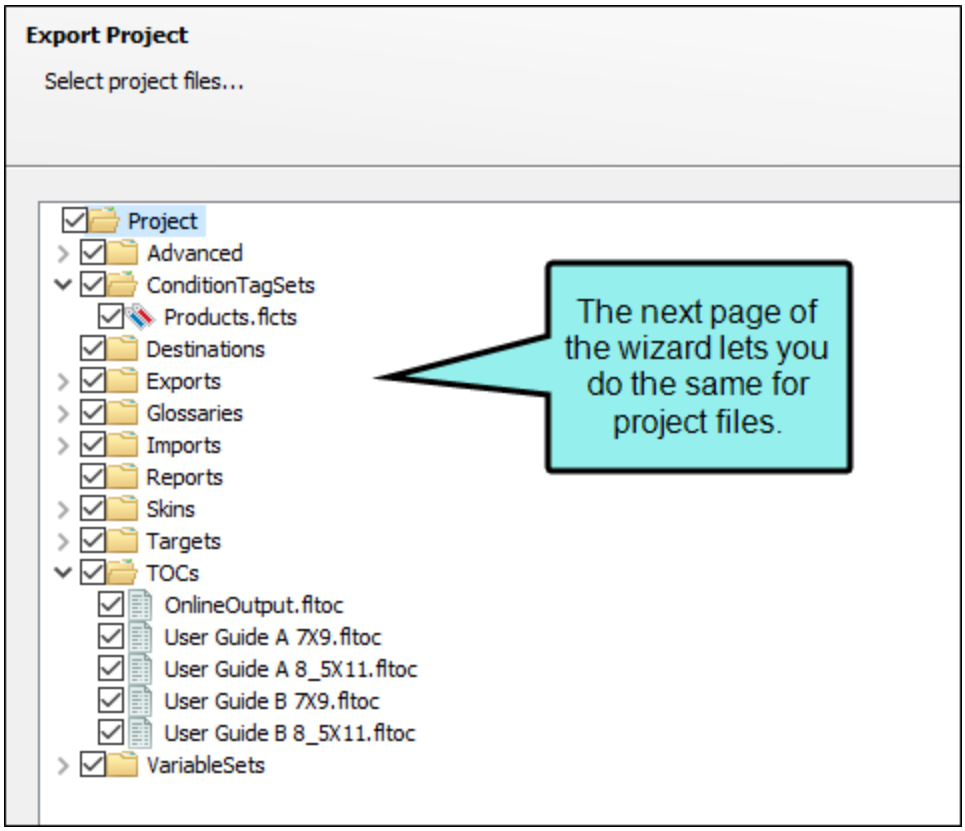
IF SELECT FILES

a. Make sure a check mark is next to each content folder or file that you want to include in the exported project. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary. You can expand folders and subfolders to see files within them.



b. Click **Next**.

c. Make sure a check mark is next to each project folder or file that you want to include in the exported project. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary. You can expand folders and subfolders to see files within them.



12. If you are exporting project files or zip files (step 6), click **Finish**. The project is exported, and Windows opens to the location, showing you the project or zip files. However, if you are exporting to a template, continue with the wizard and complete the remaining options.

IF PROJECT TEMPLATE

a. Click **Next**.

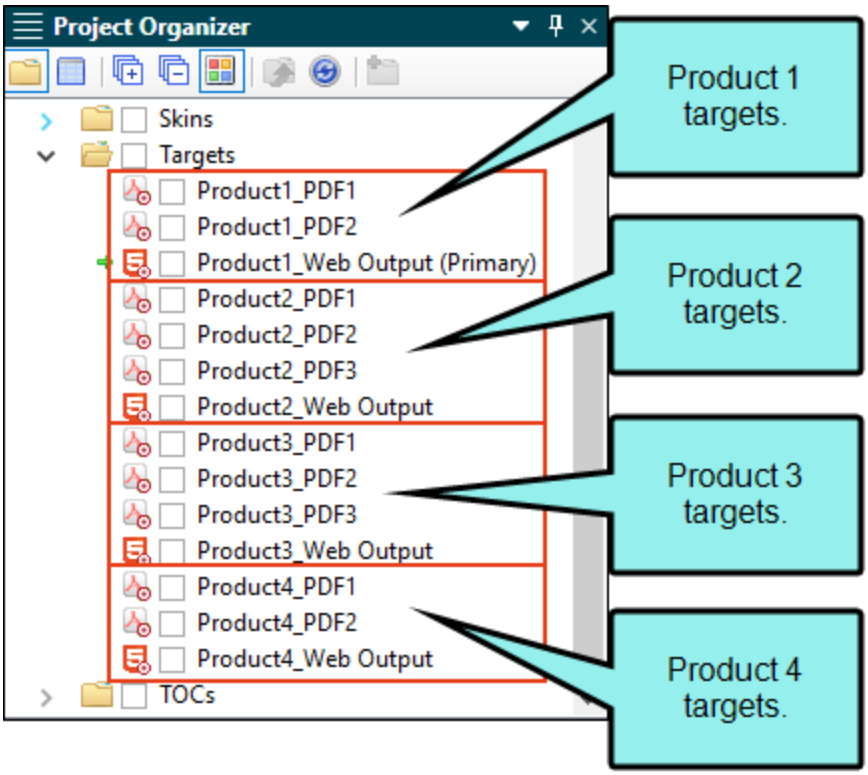
b. On the next page of the template, select the template folder where you want to export the files. You can click **Manage Templates** if you need to add or change template folders.

c. In the **Template Name** field, enter a new name for the template.

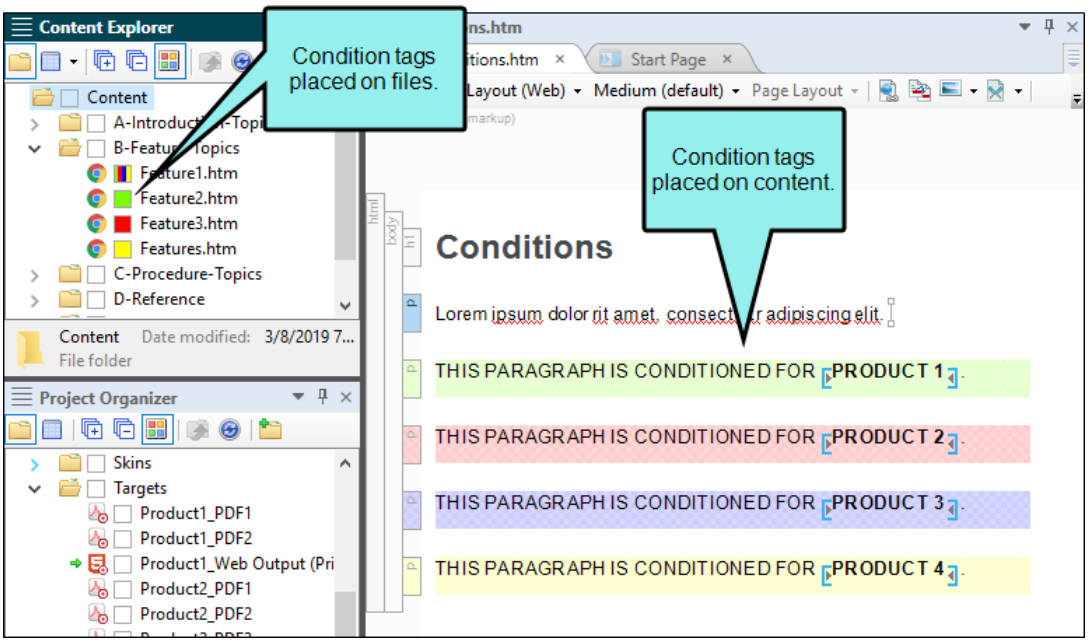
d. Click **Finish**. The project is exported, and Windows opens to the location, showing you the files.

☆ EXAMPLE — Archive Using Conditions

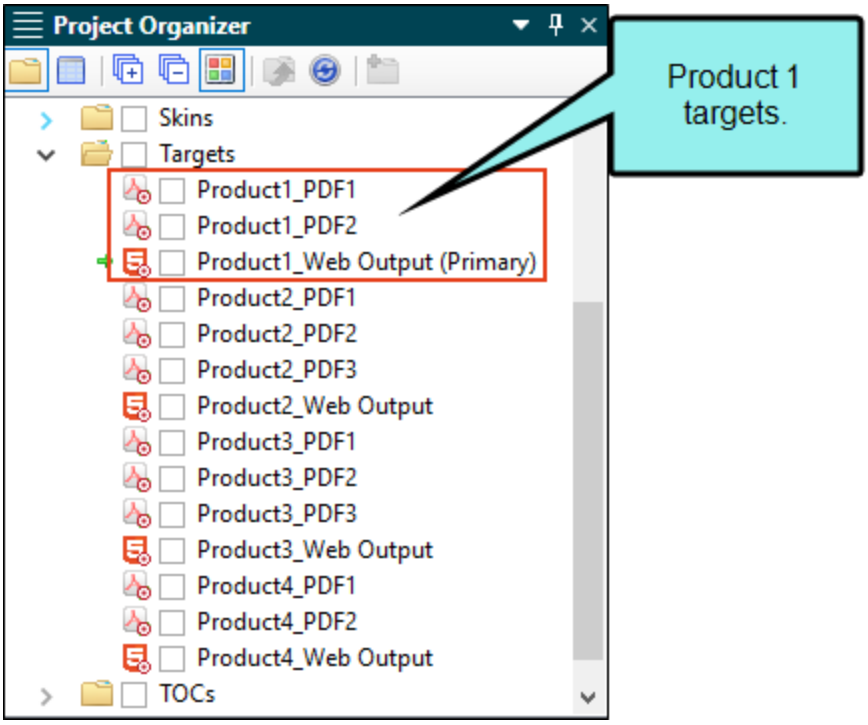
You have a large Flare project, from which you create single-sourced output for four products. Furthermore, let's say that the documentation for each of those products consists of several targets in the Flare project (e.g., some online, some print-based outputs).



In order to keep the output separate and organized throughout the Flare project, you use condition tags, both on content and on the files themselves (e.g., topics, images, stylesheet).



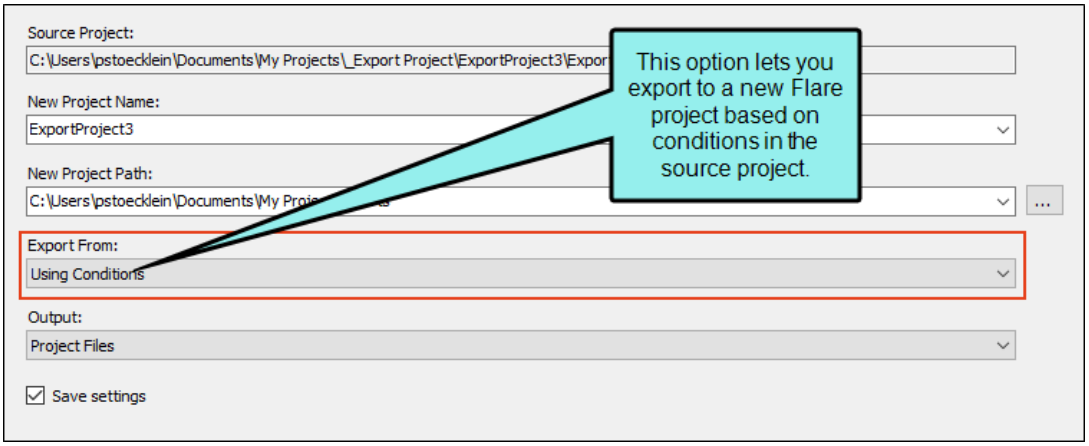
Your manager says that each time you finish documentation for a particular product, you must save just those files in a repository. So let's say one day you finish the documentation for Product 1, which you've designed to produce output from three targets (one output for the Web, and two outputs for PDFs).



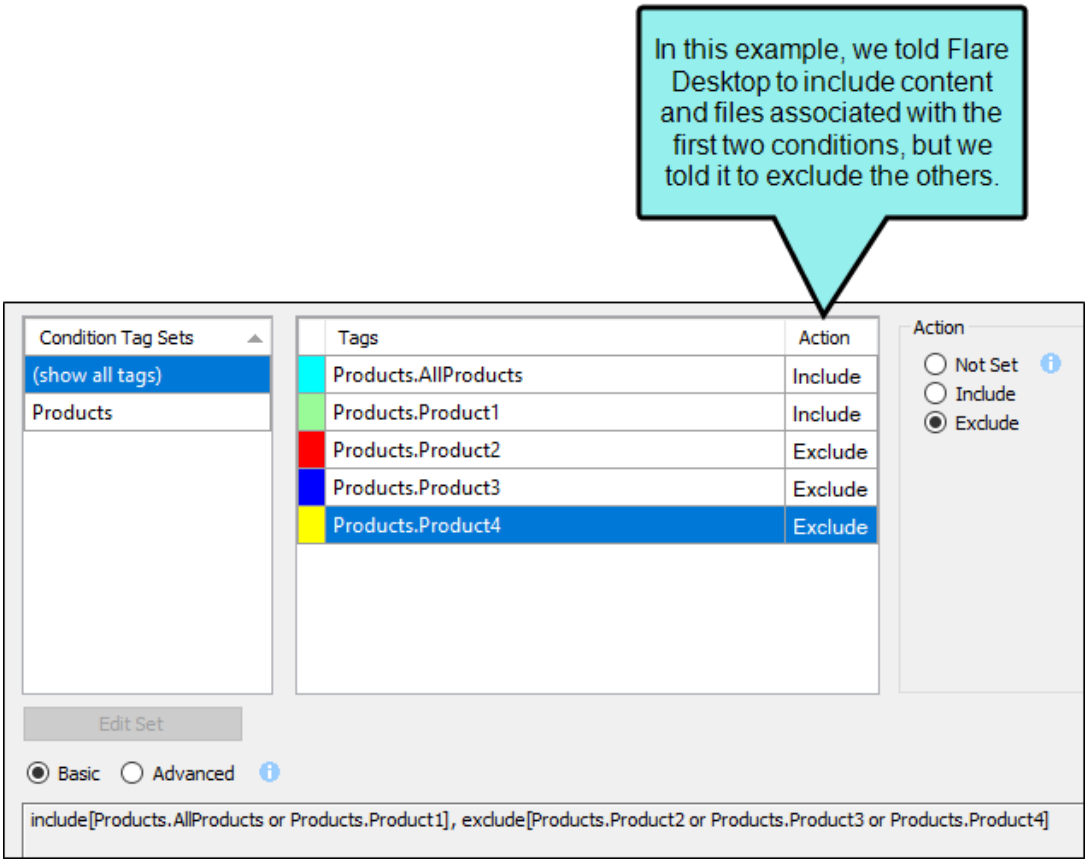
Your large Flare project holds the finished documentation for Product 1, but it also holds the documentation for Products 2, 3, and 4, which are in different stages of progress. You want to archive only the documentation that is specific to Product 1, so you decide to export the relevant files from the large Flare project to a smaller one.

But how do you do this? One option is to export to a smaller project based on condition tags, which you have used to organize all of the content and files in the project.

So from the **Project** ribbon you click **Export Project**. On the first page of the wizard, you click in the **Export From** drop-down and select **Using Conditions**.



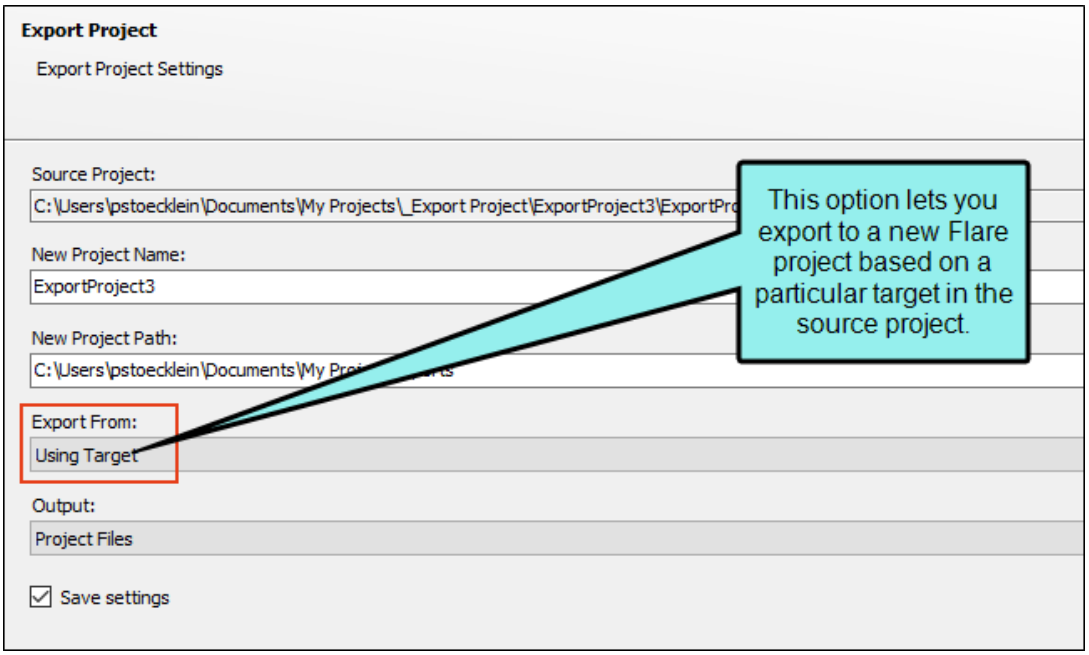
You can then tell Flare Desktop which conditions to include and which to exclude. In this case, you tell Flare Desktop to include all of the condition tags that have to do with Product 1 and its targets, and you exclude all of the condition tags that have to do exclusively with the other products and their targets.



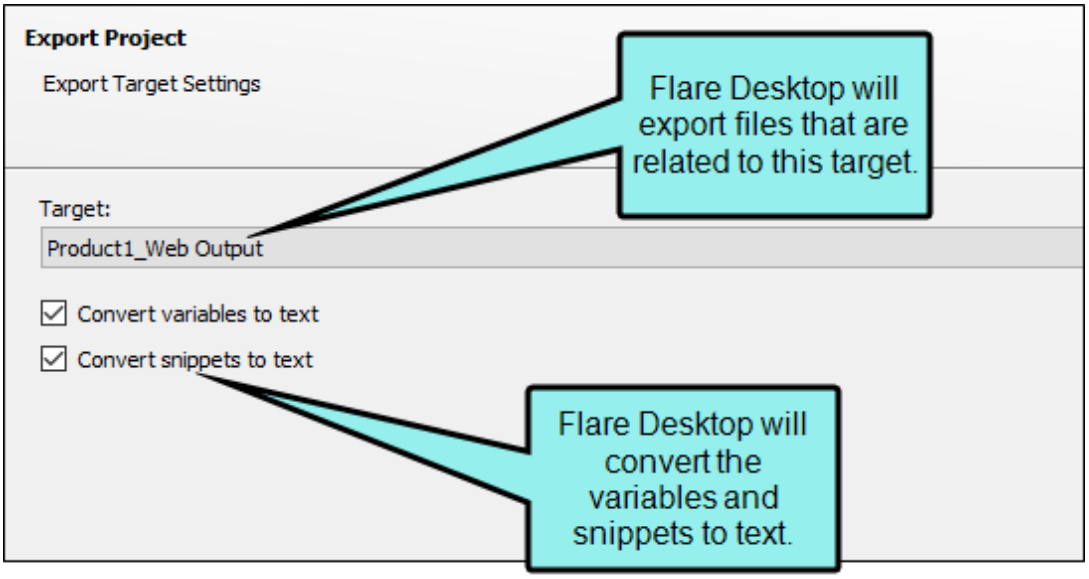
After clicking **Finish**, the relevant files and content are exported to a new, smaller Flare project.

☆ EXAMPLE You have a Flare project with seven targets, and you need to translate the content associated one of those targets from English to French. You could send the entire Flare project to the translator, but that would mean the translator would be getting files associated with all seven targets, not just the one requiring translation. So you decide to export only the portion of the Flare project that needs to be translated.

First, from the **Project** ribbon you click **Export Project**. On the first page of the wizard, you click in the **Export From** drop-down and select **Using Target**.



☆ On the next page of the wizard, you select the target whose files you want to export. In this case, let's say the target in question is named "Product1_Web Output." In addition, you tell Flare Desktop to convert variables and snippets to text so that they become part of the topics, rather than separate files.



After clicking **Finish**, the relevant files and content are exported to a new, smaller Flare project, which you send to the translator. Only the files and content necessary to produce the Product1_Web Output target are included in the export. Therefore, the translator receives only the files requiring translation.

What’s Noteworthy?

NOTE As an alternative to exporting projects in the Flare Desktop user interface, you can use madbuild to export projects from the command line. Using this method, you do not need to have Flare Desktop open, and you can schedule exports for specific days and times. See "Exporting Projects Using the Command Line" on the next page.

NOTE There is also a less robust, but quicker feature for zipping projects. See "Zipping Projects" on page 165.

Exporting Projects Using the Command Line

As an alternative to exporting projects in the Flare Desktop user interface, you can use madbuild to export projects from the command line. Using this method, you do not need to have Flare Desktop open, and you can schedule exports for specific days and times.

How to Use the Command Line to Export a Project

1. Add an export project file in the Project Organizer. It will be placed in an Exports folder. See "Adding an Export Project File" on page 139.
2. Complete the fields in the Export Project File Editor. You need to do this so that Flare Desktop knows where to export the project, which parts of it to export, and so on. These fields need to be completed only once. After that, you can export the project anytime you want and these same rules will be used. For more information on each field and option in the Export Project File Editor, see "Exporting Projects" on page 140.
3. Do one of the following, depending on whether you want to create a batch file for later use or to export immediately using the command line.
    - To Create a Batch File (Recommended) Open Notepad. For example, in Windows 7, you can open it by clicking the Start button and selecting All Programs > Accessories > Notepad.

      OR
    - To Generate Immediately From the Command Line Open your command prompt. For example, in Windows 7, you can open it by clicking the Start button and then selecting All Programs > Accessories > Command Prompt.

4. Type the path to the Flare.app folder where you installed Flare Desktop, and press **ENTER**.

> **EXAMPLE** If you installed Flare Desktop at C:\Program Files (this is just an example; your files might be installed in a different folder, such as Program Files x86), you might type the following and press **ENTER** on your keyboard:
>
> ```
> cd\Program Files\MadCap Software\MadCap Flare 21\Flare.app
> ```

> **NOTE** Alternatively, you can use **cd c:\Program Files\[rest of the path]** instead of **cd\Program Files\[rest of the path]**.

5. Type the following and press **ENTER** on your keyboard (entering the path to your project, and the export file within it, in place of the section in angle brackets):

   ```
   madbuild -export [project path] -settings [export project file name]
   ```

   Make sure you add the .flexp file extension at the end of the export project file name.

> **TIP** If you are using the command prompt (as opposed to a Notepad file) and you have an operating system that supports dragging, you can drag a file from the Windows location to the Command Prompt window. This will add the path of the file within quotation marks for you.

> **NOTE** If there are spaces anywhere in your path or project name, you need to use quotation marks around it.

> **EXAMPLE** — No Spaces
>
> You have a Flare project called "FictionSoftPro" that you have stored in a folder of the same name at the root level of the C: drive. Within that project you've created an export file named "MyExportFile." In that case, you can type this:
>
> ```
> madbuild -export c:\FictionSoftPro\FictionSoftPro.flprj -
> settings MyExportFile.flexp
> ```

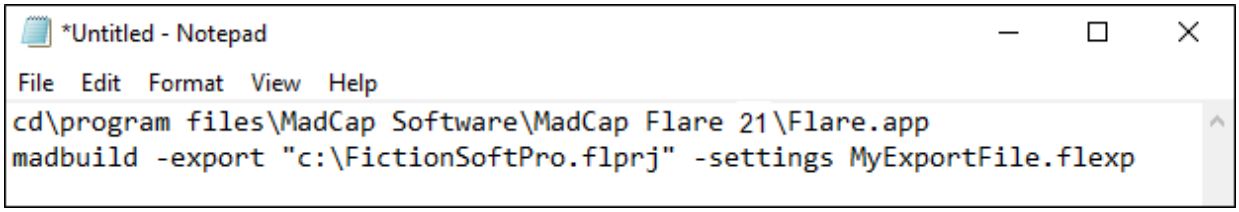
☆ EXAMPLE — Spaces

You have a project called "FictionSoftPro" that you have stored in a folder named "My Projects" (with a space) at the root level of the C: drive. Within that project you've created an export file named "My Export File" (with spaces). In that case, you can type this:

```
madbuild -export "c:\My
Projects\FictionSoftPro\FictionSoftPro.flprj" -settings "My
Export File.flexp"
```

If you are using the command prompt window, the project is exported immediately.

If you are creating a batch file in Notepad, it might look something like this:



Batch Files and Task Scheduler

If you are creating a batch file, save the Notepad file to any location you like on your computer. When you do this, type `.bat` as the extension at the end of the file name (e.g., MyBatchFile.bat). At any time you like, you can export the project simply by double-clicking the batch file. You can also use a tool to schedule the batch file to run.

For example, complete the following steps if using the Windows 10 Task Scheduler utility.

1. In the Windows search field, type `Task Scheduler` and press ENTER.
2. Click Action > Create Basic Task.
3. In the Create Basic Task Wizard, give the task a name and click Next.
4. Using the next couple of pages of the wizard, choose when you wan the batch to run (e.g., daily, starting at 2 a.m.). Click Next until you get to the Action page.
5. Click Start a program, and click Next.
6. Click Browse. Then find and double-click the batch file you created.
7. Click Next.
8. Click Finish.

Error Codes

If you export a project using the command line, the following error codes may be seen if problems occur during an export process:

- 3001 The entered export project file does not exist.
- 3002 There was an error parsing the entered export project file.
- 3003 Export failed.
- 3004 Export destination name not set in the export file
- 3005 Export destination path not set in the export file
- 3006 Template name not set in the export file
- 3007 Template path not set in the export file
- 3008 Target path not set in export file (when exporting using target)
- 3009 Target path not found (when exporting using target)
- 3010 Conditional expression not set (when exporting using conditional expression)
- 3011 File Tag expression not set (when exporting using file tag expression)
- 3012 No files selected (when exporting using manual selection)

CHAPTER 4

Other Activities for Projects

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

This chapter discusses the following:

Opening a Project 162
Closing Projects 163
Deleting Projects 163
Zipping Projects 165

Opening a Project

You can open an existing project by using interface options or dragging files from Windows Explorer.

How to Open a Project Using Interface Options

Do one of the following, depending on the part of the user interface you are using:

- Start Page On the right side of the Start Page, click Open. You can also click a recently opened project on the left side. If you do not see the Start Page, select View > Start Page.
- Ribbon Select File > Open.
- Keyboard Shortcut Press CTRL+O.

How to Open a Project by Dragging

1. Launch Flare Desktop.
2. Open Windows and navigate to a folder containing a project (FLPRJ) file.
3. Drag the project file from Windows to the application window and drop it on the title bar in Flare Desktop.

Closing Projects

When you are finished working on a project, you can either close the project or close Flare Desktop altogether. If you close just the project, Flare Desktop remains open, which lets you start another project if you want. Select **File > Close > Close Project**.

Deleting Projects

To delete a project completely, you must use Windows Explorer. This operation cannot be done from Flare Desktop.

You can also remove projects from displaying as recent projects in Flare Desktop. This does not delete the project, but simply removes it from those shortcut locations.

How to Delete a Project Through Windows

1. In Windows Explorer, browse to the location where you have stored the project (e.g., C:\Users\[username]\Documents\My Projects).
2. Delete the folder holding the project files.

How to Remove a Project From Recent Projects in Flare Desktop

1. Select **File > Manage Recent Projects**. The Recent Projects dialog opens.
2. Highlight the project and click **Remove**.
3. Click **OK**.

What's Noteworthy?

NOTE Projects that you have pinned in the Start Page are not removed from it when you manage your recent projects, removing them all. If you want to remove a pinned project from the Start Page, you need to unpin it in order for it to be removed. Just click the pin button to the right of the project.

Zipping Projects

If you want to send your project to another location or person, you can package (zip) the project into a single file that is much smaller than the entire project in its normal state. The zipped project can then be easily unzipped by anyone who also uses Flare Desktop, retuning the project to its normal state so that it can be edited. Zipping a project is also a great way to create and store a backup of your project.

There are two methods you can use—(1) zipping only or (2) zipping and emailing. The first method lets you zip the project and place the compressed file where you want on your computer. The second method lets you zip the project and immediately attach it to an email so that you can send it to someone. This topic deals with the first method.

How to Zip a Project

1. Open a project.
2. Select Project > Zip Project. The Create Package dialog opens.
3. (Optional) You can click in the Package File field and rename the zipped file at the end of the path. By default, the zipped file is named after your project.
4. (Optional) You can click the Browse button and navigate to another folder to store the zipped file. By default, Flare Desktop specifies that the zipped file should be placed in your "Documents" folder, but you can use the Browse button to change that.
5. Click Create. Flare Desktop compresses the project and places it into a single file with an .flprjzip extension.

PDFs

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

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

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 Flare Online 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