MADCAP FLARE DESKTOP 2025

Templates

CONTENTS

Introduction

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

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

General Information

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

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

Welcome

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

How It Works

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

[Insert Process Image]

Steps

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

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

☆ Now you need to make sure that you have a template folder ready to hold the new template file. Therefore, you select the **Tools** ribbon. In the **Templates** section you click **Manage Templates**. This opens the Template Manager.
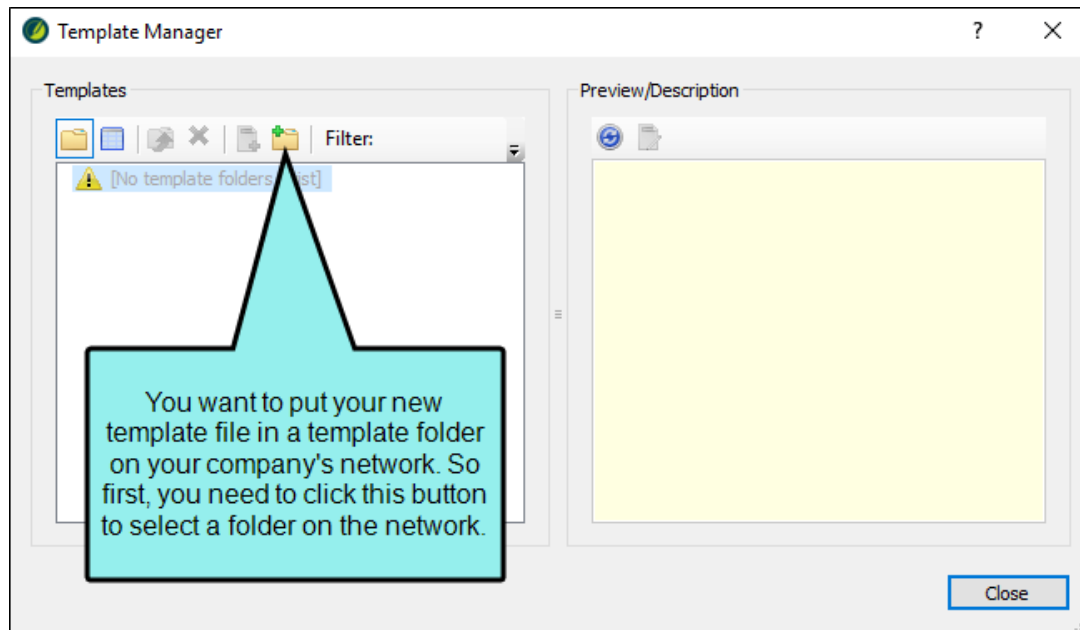
☆ In the dialog that opens, you find and select the folder where you want to store the template file.
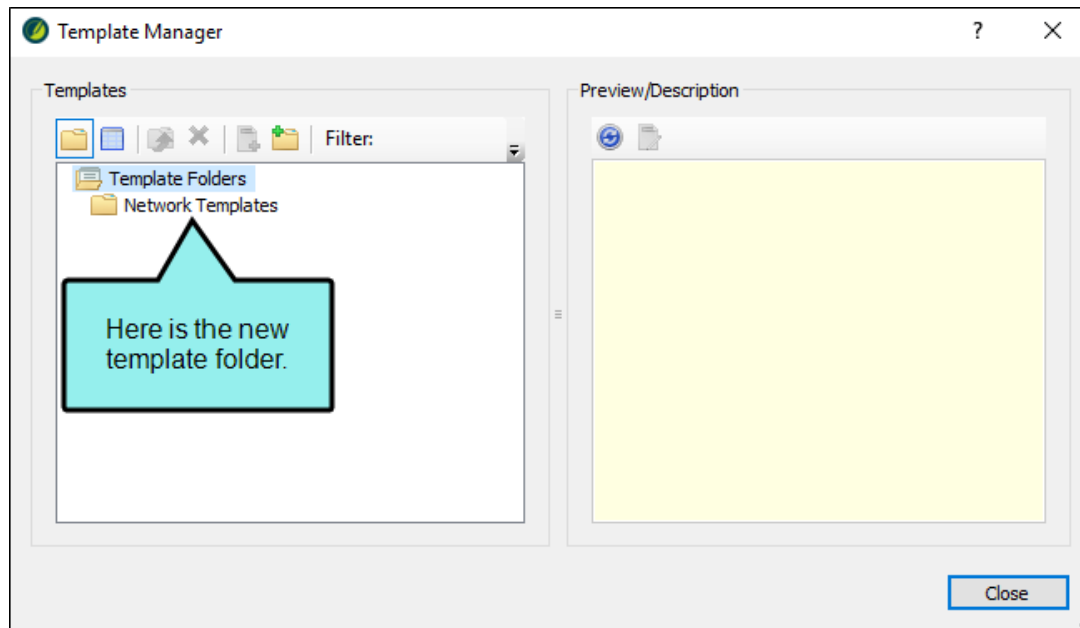
☆ After closing the Template Manager, you make sure your new topic is still open. Then you select **File > Save > Save As Template**. In the dialog that opens, you select the new template folder and click **OK**.
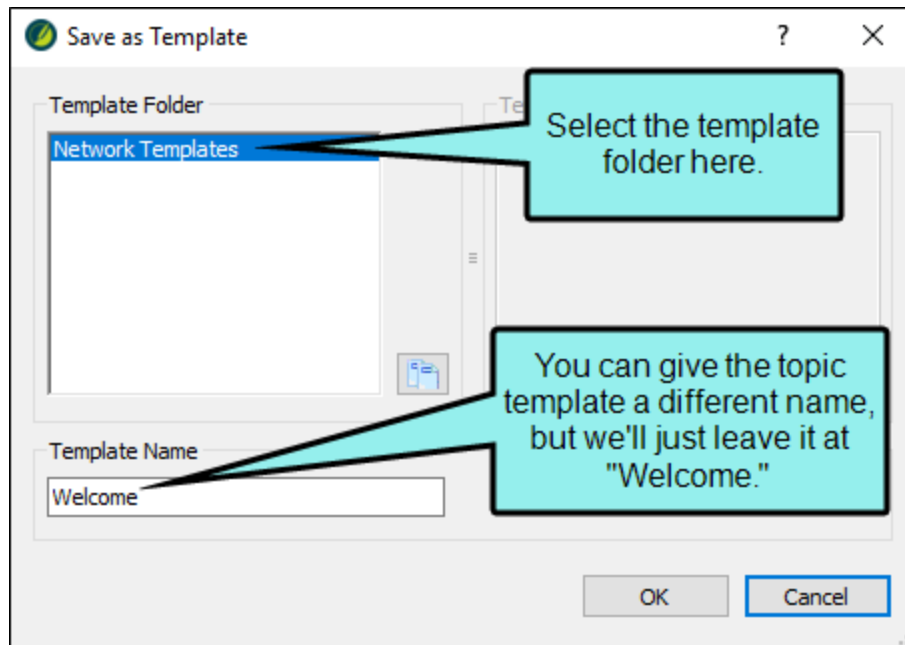
☆ Now let's say that Karen, one of the other authors, wants to create a "Welcome" topic for a new project she is working on. In her Flare project, she selects **Project > New > Topic**. In the dialog that opens, she selects the template file you created, chooses a location (in the following example, the root folder), and provides a name for the new file. Then she clicks **Add**.
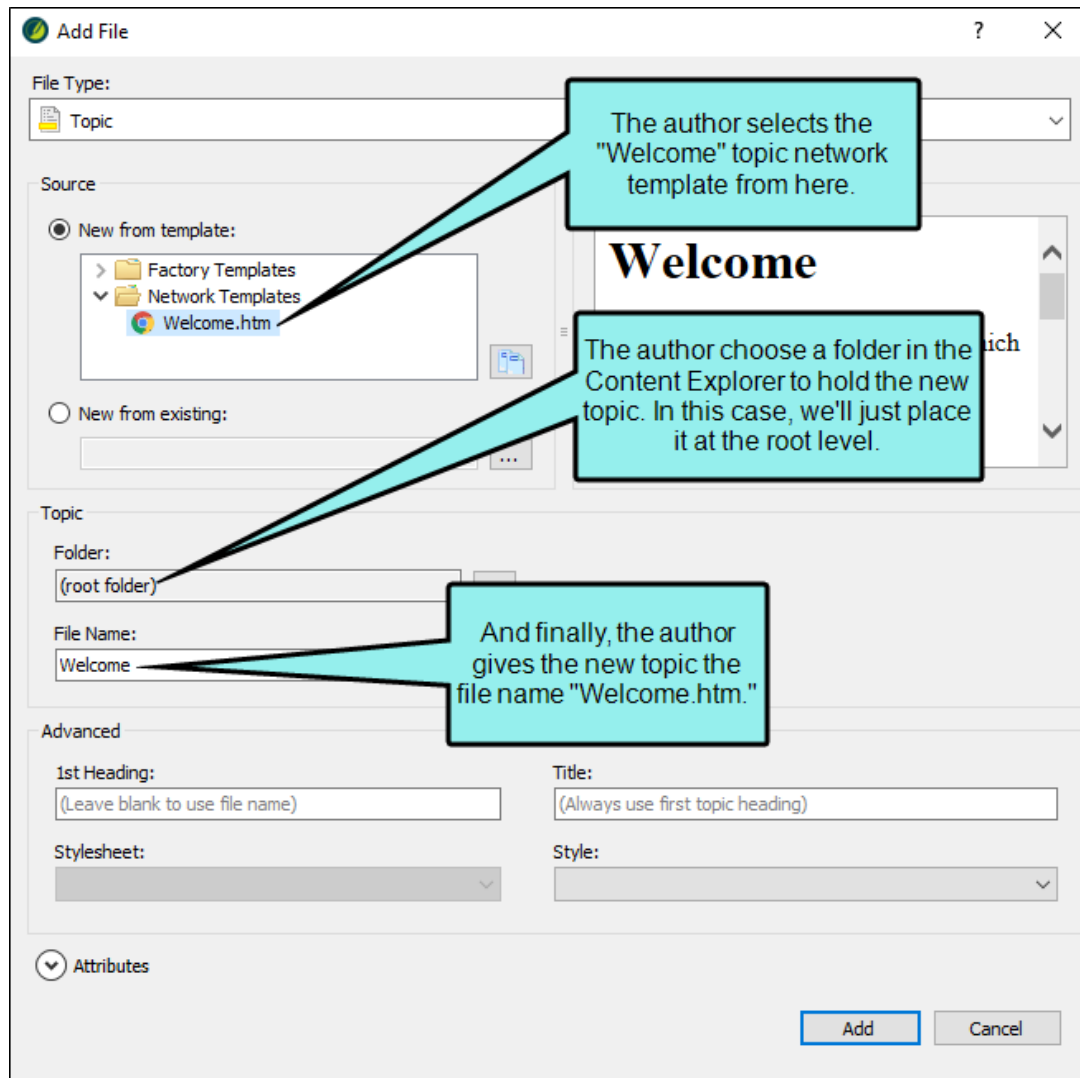
☆ The new topic is added to the Karen's project. In order for her topic to look just like your topic, she needs to add the same stylesheet file to her project. This can be done by simply importing that file or maybe through Global Project Linking.

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

CHAPTER 2

General Information for Templates

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

This chapter discusses the following:

Contribution Templates

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

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

Flare's Factory Project Templates

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

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

- **Online** These templates were designed for online output only (although you can always add print-based outputs later).

- **Online & Print** These templates were designed to generate both online and print-based outputs from the same content.

- **Print** These templates were designed for print-based output only (although you can always add online outputs later).

- **Tutorials** This folder contains templates intended to be used with various Flare Tutorials.
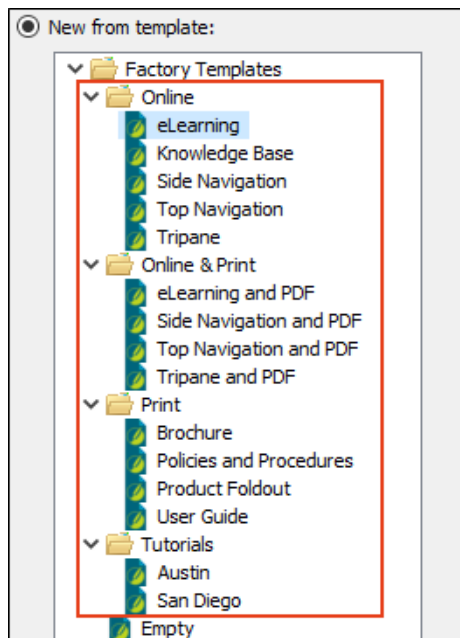
Online Templates

Template	Characteristics
eLearning	- Contains starter topics and other files designed for an **eLearning course** in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination. - Lets you integrate course output with an external **learning management system (LMS)** for tracking results; supports **SCORM and xAPI**. - Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Knowledge Base	- Contains starter topics and other files designed for an **online knowledge base** in HTML5 format. If you intend to use Flare Desktop to generate an online knowledge base, this project demonstrates one approach you may consider. - Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Side Navigation	- Contains starter topics and other files intended for online HTML5 output that looks like a **modern website with navigation on the side (left or right)**. - Offers a **frameless**, modern alternative to the more traditional tripane format. - Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Template	Characteristics
Top Navigation	▪ Contains starter topics and other files intended for online HTML5 output that looks like a **modern website with navigation on the top**. ▪ Offers a **frameless**, modern alternative to the more traditional tripane format. ▪ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Tripane	▪ Contains starter topics and other files intended for online HTML5 output in a traditional **tripane format (navigation pane, toolbar pane, content pane)**. ▪ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Online and Print Templates

Template	Characteristics
eLearning and PDF	▪ Contains starter topics and other files designed for an **eLearning course** in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination. ▪ Lets you integrate course output with an external **learning management system (LMS)** for tracking results; supports **SCORM and xAPI**. ▪ Online HTML5 output allows for **interactivity in learning blocks** (e.g., selecting answers, viewing feedback and test results). Includes **responsive output**, which means the content display changes automatically depending on the width of the screen. ▪ PDF output allows for distribution of a print version of the course, with a one-click option to **show or hide answers** in the output.

Template	Characteristics
Side Navigation and PDF	▪ Contains starter topics and other files intended for both online and print-based output. ▪ Online HTML5 output looks like a **modern website with navigation on the side (left or right)**. Offers a **frameless**, modern alternative to the more traditional tripane format. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen. ▪ PDF output is a **user guide** that includes **auto-generation of a TOC, glossary, and index**.
Top Navigation and PDF	▪ Contains starter topics and other files intended for both online and print-based output. ▪ Online HTML5 output looks like a **modern website with navigation on the top**. Offers a **frameless**, modern alternative to the more traditional tripane format. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen. ▪ PDF output is a **user guide** that includes **auto-generation of a TOC, glossary, and index**.
Tripane and PDF	▪ Contains starter topics and other files intended for both online and print-based output. ▪ Online HTML5 output uses a traditional **tripane format (navigation pane, toolbar pane, content pane)**. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen. ▪ PDF output is a **user guide** that includes **auto-generation of a TOC, glossary, and index**.

Print Templates

| Template	Characteristics
Brochure	■ Contains two topics and two page layouts **designed to create a brochure with three panes**.
Policies and Procedures	■ Contains starter topics and other files **designed to produce a policies and procedures manual in PDF format**. ■ Includes **content and variables** that you can re-use. ■ Includes **auto-generation of a TOC and index**.
Product Foldout	■ Contains two topics and two page layouts **designed to create a four-pane PDF product foldout**. ■ Ideal for **brief product instructions**.
User Guide	■ Contains starter topics and other files **designed to produce a user guide in PDF format**. ■ Includes **auto-generation of a TOC, glossary, and index**.

Tutorial Templates

| Template	Characteristics
Austin	■ Designed to be used alongside various feature tutorials. ■ Tutorials help you in the **creation of Flare Desktop features**, such as micro content, context-sensitive Help, snippet conditions, and more.

Template	Characteristics
San Diego	■ Designed to be used alongside self-paced **Getting Started tutorial**. ■ This tutorial gives you **hands-on experience in Flare Desktop**, guiding you in the basic steps for creating, developing, and building output. ■ End result is a PDF guide and online HTML5 output with **top navigation like a modern website**, instead of the more traditional tripane format.

Downloading Additional Project Templates

If you want to use one of the many other templates available from the MadCap Software website (including older ones that once were available in this wizard), you can click a new link to browse the templates and download them.
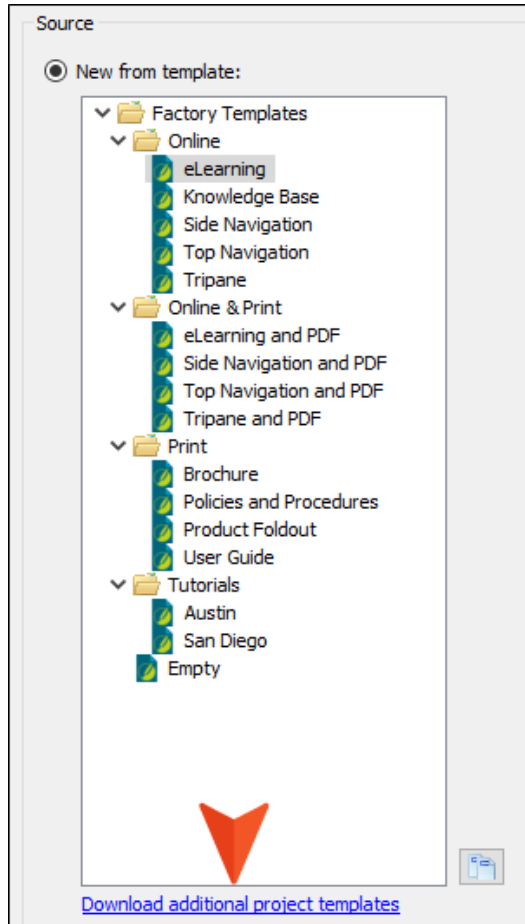
After downloading a project template, you can unzip it and save it to a location on your computer. Then, next to **New from existing**, click ⬚ and select that project's main .flprj file.
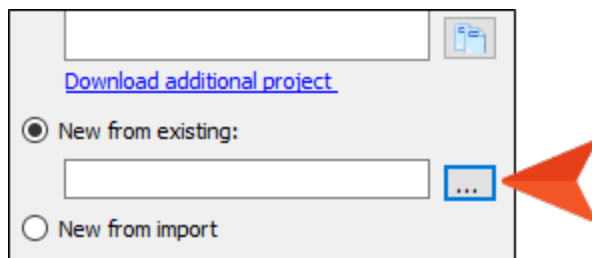
Process for Templates

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

This chapter discusses the following:

❙ Creating Template Folders

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

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

How to Create a Template Folder

1. Select **Tools > Manage Templates**. The Template Manager opens.

2. Click .

3. In the Select dialog, find and select the folder where you want to store template files.

4. After you have selected the folder, click **OK**.

5. In the Template Manager, click **Close**.

▎Creating Templates

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

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

How to Create a Template of an Entire Project

1. Create a project, adding all of the content, elements, and settings that you want to be part of the project.

2. Select **Project > Save Project As Template**.

3. In the **Template Folder** section, select the folder where you want to store the template files.

4. The **Template Name** field, enter a name for the new template.
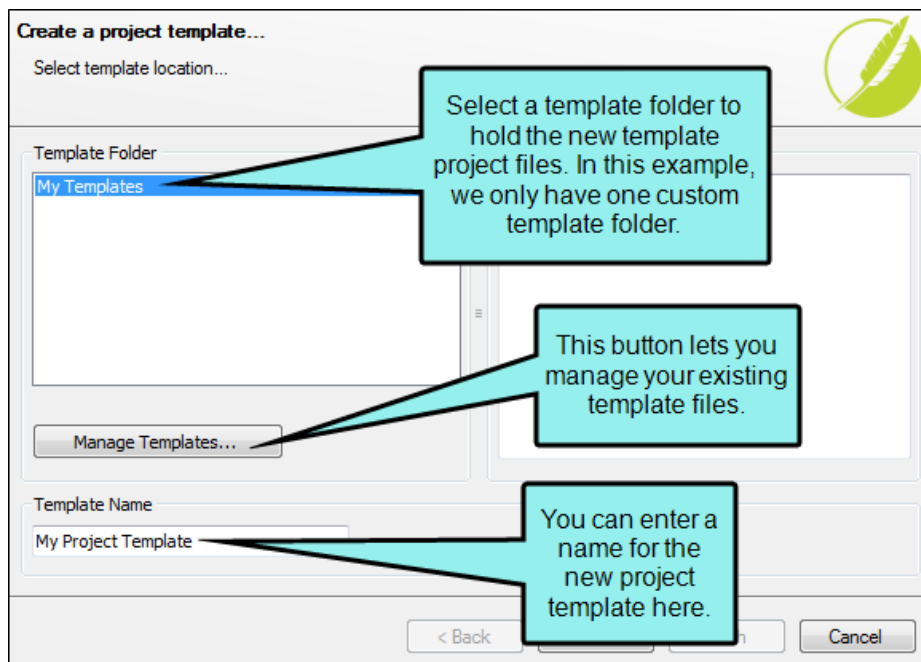
5. Click **Next**.

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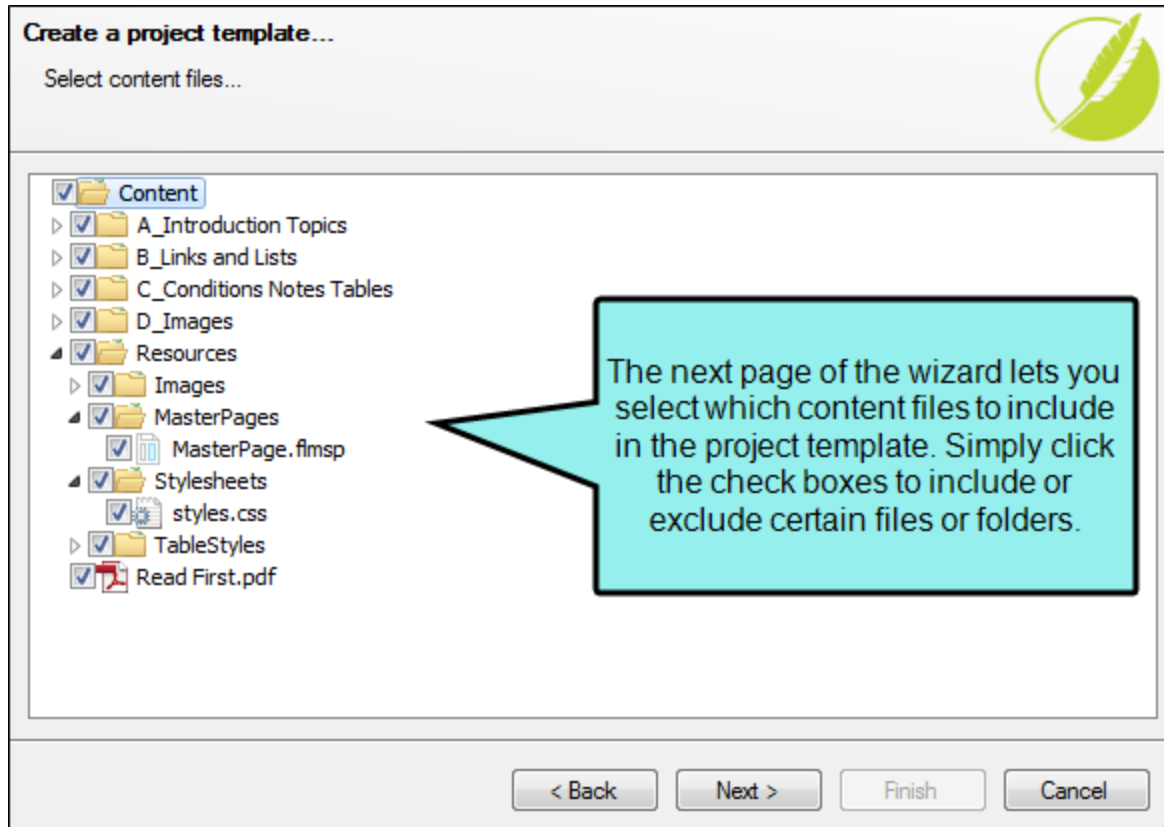

7. Click **Next**.

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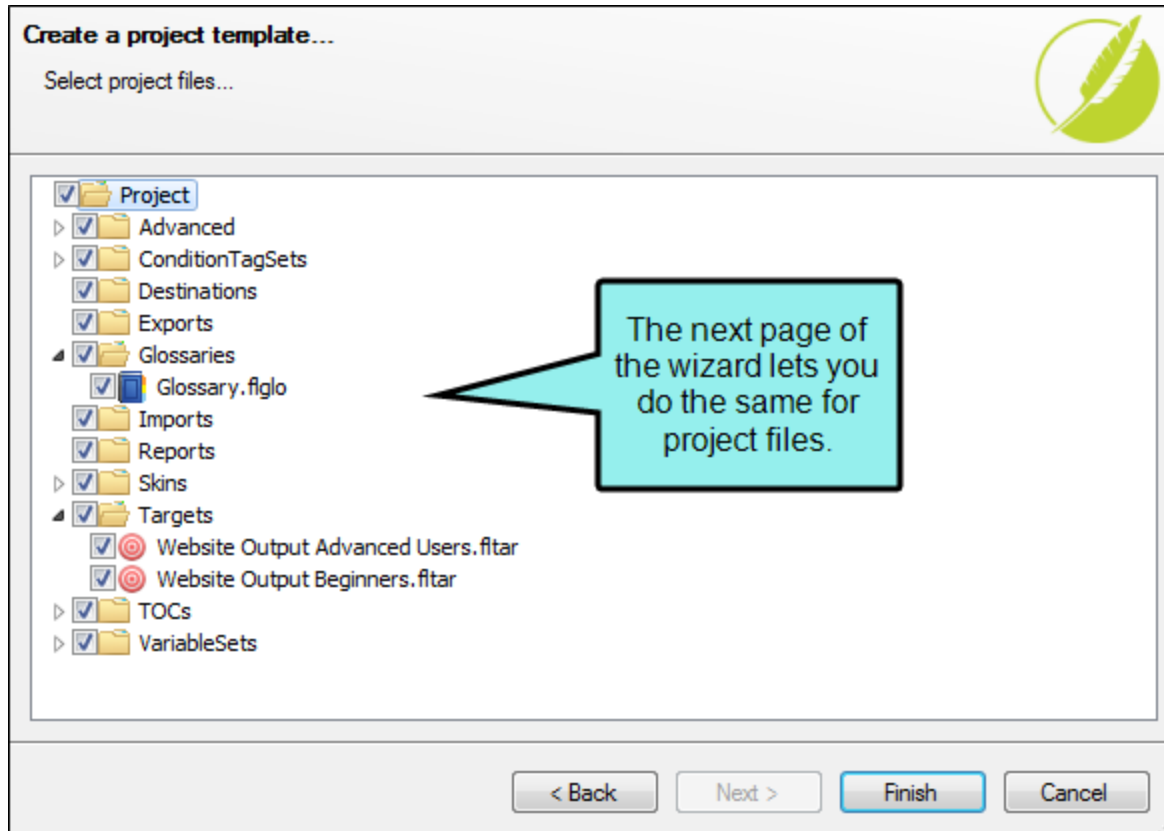
9. Click **Finish**.

How to Create a File Template—File Open

1. In Flare Desktop create the element (e.g., topic, target, skin, template page) that you want to use as a template.

2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.

3. Select **File > Save > Save As Template**.

4. In the **Template Folder** section, select the folder where you want to store the template file.

5. The **Template Name** field, enter a name for the new template.
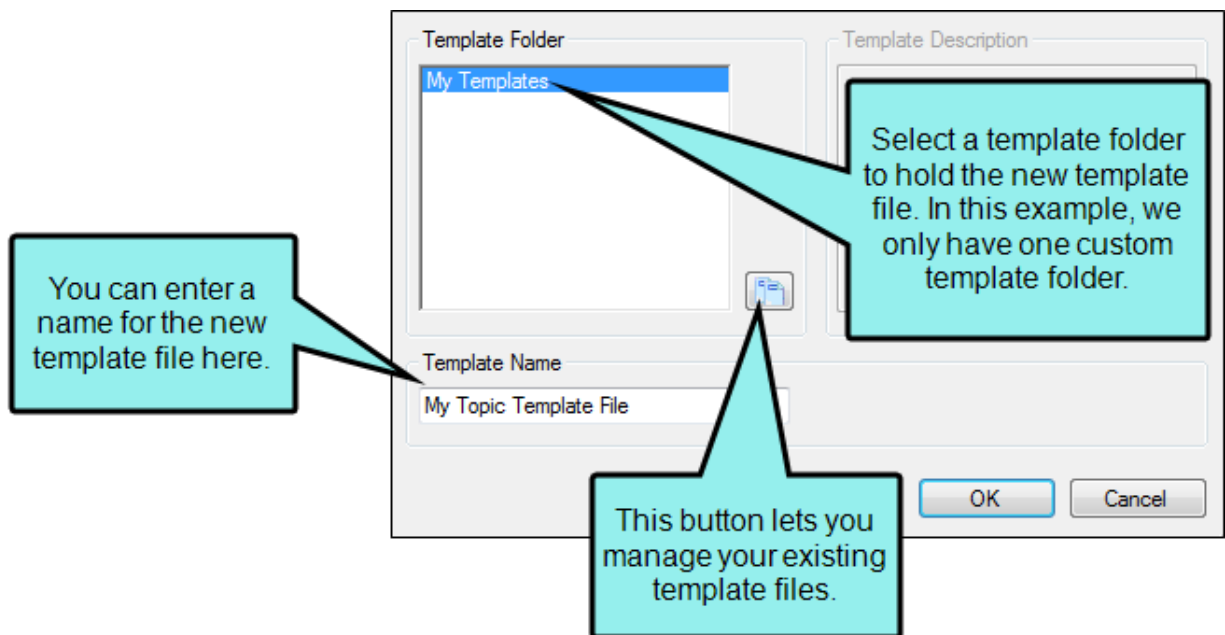
6. Click **OK**.

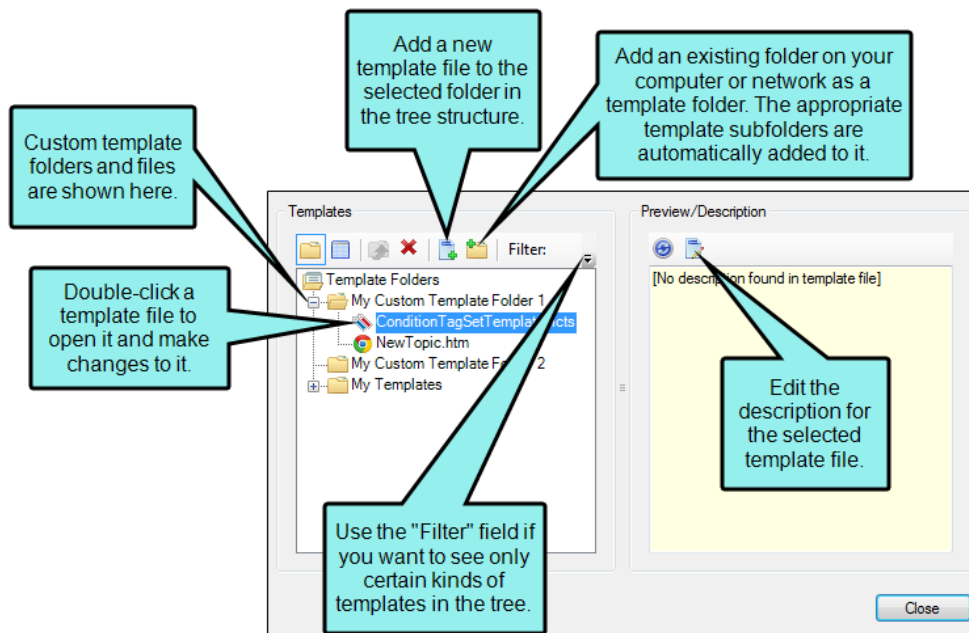# How to Create a File Template—Template Manager

1. In Flare Desktop create the element (e.g., topic, target, skin, template page) that you want to use as a template.

2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.

3. Click ⊞ to save your work.

4. Select **Tools > Manage Templates**.

5. In the built-in tree, find and select the folder where you want to store the template file.

6. Click ⊞.

7. In the dialog that opens, find and double-click the file that you want to add as a template.

8. In the Save As Template dialog click **OK**.

9. In the Template Manager dialog click **Close**.

What's Next?

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

▎Managing Templates

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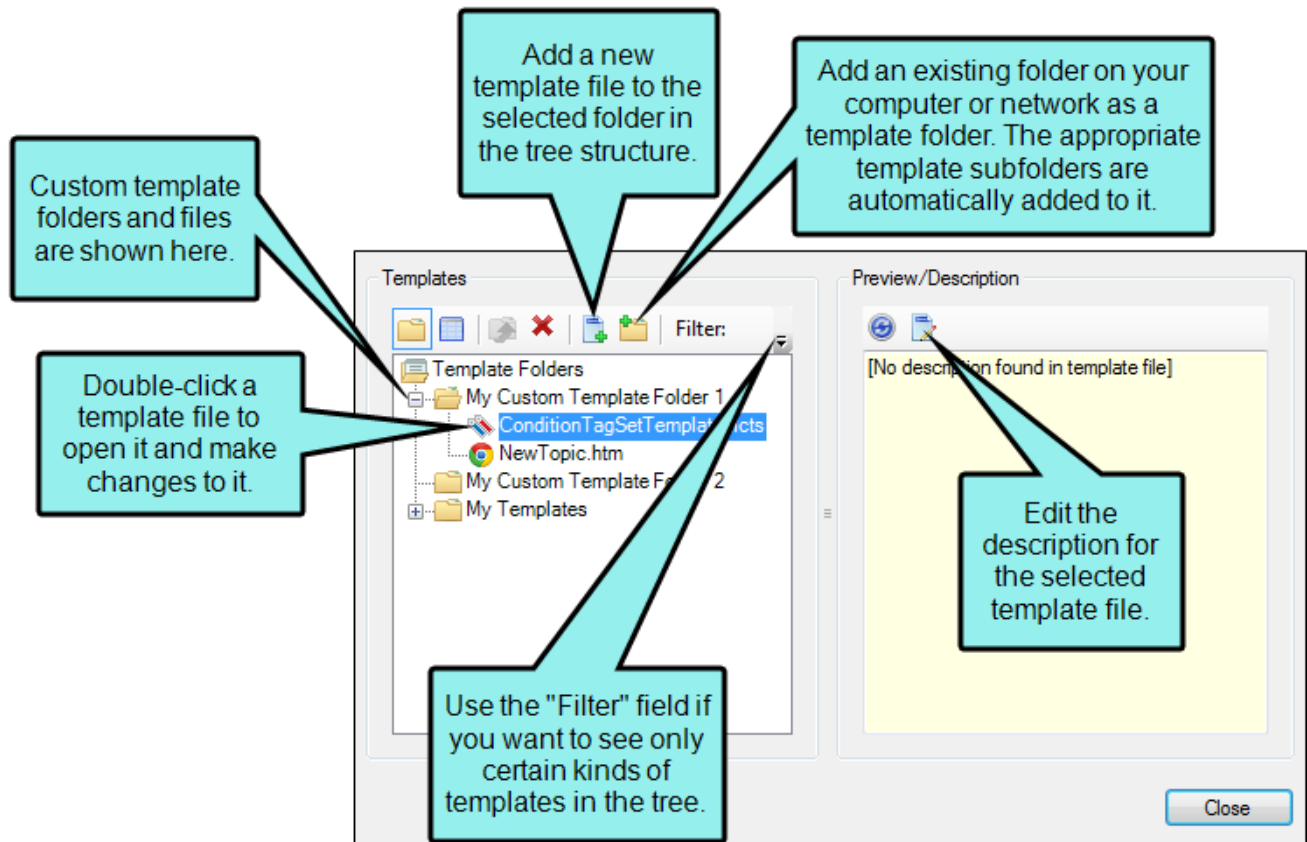
Adding Template Files

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

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

Creating Template Folders

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

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

Opening and Editing Template Files

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

Editing Template Descriptions

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

Changing Project Templates

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

How to Change Project Templates

1. Download the template you want to use, or create a new, small project based on a template.

2. Open that new project in Flare Desktop (if you downloaded a project template, you can double-click the Flare zip file to unpack and open it), and add a Flare project import file (**Project > New > Import File > Add Flare Project Import File**).

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

3. In the Project Import Editor, select the source project and use the fields to choose the files you want to import. If you are importing from the original project into the new template project, you probably want to limit your selections to non-design files (e.g., choose files such as topics, snippets, images, and variables), although in some cases you might decide to keep some design files (e.g., stylesheet, page layouts). When finished, save your work, click **Import**, then **Accept**.

4. Delete any of the topics and other files that were part of the template project and you do not plan on using (e.g., topics, images, TOC). Also, in the Project Organizer, expand the **Imports** folder and delete the import file (unless you plan on re-importing some more files).

5. Generate and view output and see what kinds of manual changes you might need to make. For example, if you imported your original stylesheet, you might need to link it to the one(s) in the new project, or you might need to re-apply some styles to some content.

6. You probably want to rename the new project. An easy way to do this is to select **Project > Export Project**, which gives you an opportunity to rename the project and select a location for it.

APPENDIX

PDFs

The following PDFs are available for download from the 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

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