

MADCAP FLARE DESKTOP 2025 r2

Meta Tags

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CHAPTER 1

Introduction

Supported In:



A meta tag is a type of metadata that you can use in MadCap Flare files to make it easier to find, identify, and control information, whether it is in the source files or the output.

- **Search engine optimization (SEO)** The process of improving search results (quality and quantity) for web pages by search engines.
- **Content management** The use of processes and systems to help gather, handle, and distribute information.
- **Micro content integration** The generation of short, concise information that stands alone and is easily consumable. Meta tags can help display micro content in search results, and they are also helpful in controlling where micro content is shown in regular topic output.

General Information

- "Meta Tags Tutorial and Examples" on page 9
- "Industry Standard vs. Unique Meta Tags" on page 10
- "Meta Tags and Search Engine Optimization" on page 11
- "Meta Tags and Content Management" on page 13
- "Meta Tags and Micro Content" on page 21
- "Meta Tags in the Code" on page 22
- "Where Meta Tags Can Be Added" on page 24
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Main Activities

- "Creating Meta Tag Sets" on page 45
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General Information for Meta Tags

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

This chapter discusses the following:

- Meta Tags Tutorial and Examples 9
- Industry Standard vs. Unique Meta Tags 10
- Meta Tags and Search Engine Optimization 11
- Meta Tags and Content Management13
- Meta Tags and Micro Content21
- Meta Tags in the Code 22
- Where Meta Tags Can Be Added24
- Meta Tag Inheritance and More 25
- Meta Tags in PDF, Word, and PPTX Outputs37

I Meta Tags Tutorial and Examples

In addition to the other information in this section, we recommend you also walk through the Meta Tags Tutorial and read various detailed examples to gain a better understanding of meta tags and how they work.

Tutorial

- Meta Tags Tutorial (see the Help system)

Approximate Time: 35 minutes

Welcome to the Meta Tags Tutorial.

- **Tutorial Goal** Learning how to create and manage meta tags.
- **Key Concepts** Creating meta tag sets; adding text, list, and file meta tags; setting meta tag values; finding files using meta tags.

Examples

- "Example—Adding Description Meta Tags" on page 61
- "Example—Linking Meta Tags to File Tags" on page 63
- "Example—Adding Meta Tags Using List Values" on page 67
- "Example—Adding Text Meta Tags With Variables" on page 69

I Industry Standard vs. Unique Meta Tags

Some meta tags are industry standards. For example, search engines such as Google recognize several meta tags that you can add to your files. In some cases, Flare Desktop might even automatically add an industry standard meta tag to your output for you (e.g., the viewport meta tag).

You can also create your own unique meta tags for whatever purposes you want. For example, you might use a meta tag as part of some JavaScript that you include in topics, or you might create some unique meta tags for content management purposes or to display certain kinds of micro content in your output.

Meta Tags and Search Engine Optimization

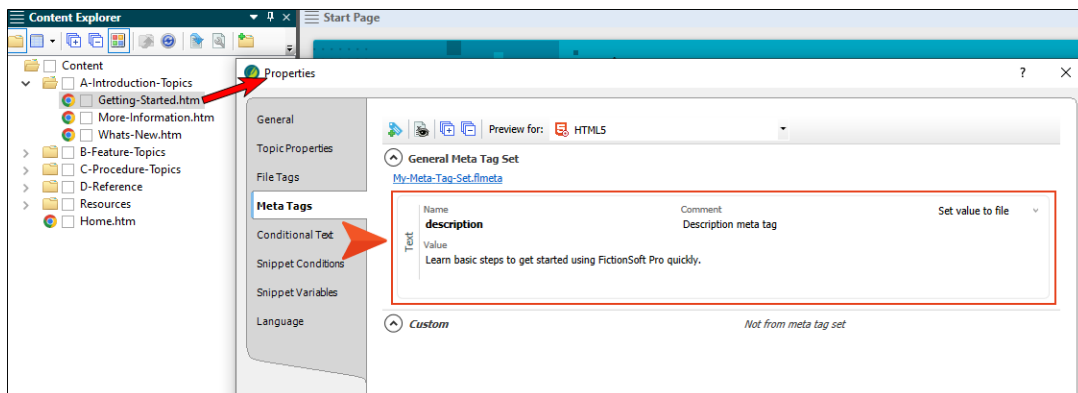
Supported In:



Certain meta tags can help with search engine optimization (SEO), the process of improving search results (quality and quantity) for web pages by search engines.

A <title> tag is certainly important for search results, although it's not technically a <meta> tag. As far as meta tags are concerned, different search engines might recognize certain ones (e.g., robots, description, geo) when displaying search results. We recommend you research the meta tags that different search engines support and use the ones that make the most sense for your output.

☆ **EXAMPLE** The "description" meta tag is currently used by all major search engines. It might not be used for search rankings by all search engines (e.g., Google does not use it for rankings), but it is still beneficial because it displays in search results and can be useful in driving users to a particular page. Therefore, it's a good idea to add this meta tag with concise, clear text for each topic that you want to be found by web crawlers.



On the other hand, the "keywords" meta tag has fallen out of favor and is not really used by search engines anymore.



NOTE Flare Desktop displays the content from the description meta tag in a search results abstract. However, this is supported only when using the MadCap Search engine. It is not currently supported with Elasticsearch.

I Meta Tags and Content Management

Content management is the use of processes and systems to help gather, handle, and distribute information. After adding meta tags to your files, there are various ways that you can find and manage that information.

 **NOTE** Analysis data for the window panes described below can also be accessed when running a report (located in the Project Organizer > Reports folder).

Viewing Used Meta Tags

1. In the **Analysis** ribbon, select **Used Items > Used Meta Tags**.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
 - **Meta Tag** Displays the name of the meta tag.
 - **Meta Tag Set** Displays the name of the meta tag set file (if any) where the meta tag was found.
 - **Content** Displays the value for the meta tag.
 - **File** Displays the name of the file.
 - **Title** Displays the properties title of the file (if any).
 - **Folder** Displays the folder where the file is found.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
4. You can click a column heading to reorganize the grid according to that value. For example, if you want to see the meta tag values grouped together, click the Content column heading.

 **NOTE** You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

Viewing Unused Meta Tags

You can view a list of all meta tags that have been created in your project but have not yet been used in any files. By "unused," we mean that the meta tag was created but no values were set for it in any file.

You can quickly delete any of the meta tags that you do not plan to use.

1. Select **Analysis > More Reports > Unused Items**.

The Unused Items window pane opens, which lets you view various unused elements in the project (such as bookmarks, condition tags, content files, CSH IDs, images, variables, styles, file tags, meta tags, and topics not linked).

2. Click the drop-down field at the top of the window pane and select **Unused Meta Tags**. The unused meta tags in the project are listed.
3. To see more of the information in the window pane, drag the divider bar to make the pane wider.
4. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
5. If you want to remove any unused meta tags from the project being analyzed, select the meta tag in the list and click  in the local toolbar.

Viewing Undefined Meta Tags

You can view a list of all files with meta tags applied to them, but those meta tags have not been defined. This might occur, for example, if you have applied a meta tag to a file and then later change the name of the tag or meta tag set in the Text Editor.

1. Do one of the following, depending on the part of the user interface you are using:
 - **Ribbon** Select **Analysis > Undefined Items > Undefined Meta Tags**.
 - **Summary Window Pane** Double-click the row that mentions undefined meta tags.

The Undefined Meta Tags window pane opens.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.

Viewing Invalid Meta Values

You can view a list of all files containing meta tags that have invalid values. For example, an invalid meta tag might occur if you remove a meta tag's list item from the meta tag set file. In a case such as this, you can resolve the issue by adding the list item back to the meta tag set, or re-associating the files with a different value.

1. Do one of the following, depending on the part of the user interface you are using:
 - **Ribbon Select Analysis > More Reports > Invalid Meta Values.**
 - **Summary Window Pane** Double-click the row that mentions invalid meta values.

The Invalid Meta Values window pane opens.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.



NOTE You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

Viewing Duplicate Meta Tags

You can view a list of all meta tags that have been applied to files throughout your project and whose values are defined two or more times in the same file. However, the same meta tag name *is allowed* in different meta tag sets.

1. Select **Analysis > More Reports > Duplicate Meta Tags**. The Duplicate Meta Tags window pane opens.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
4. You can quickly remove multiple meta tag occurrences in a single batch. Select the rows you want to affect, and click the "Delete" button.



NOTE You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

Finding Meta Tag Elements

You can use the Find Elements window pane to search for meta tag names and values to discover which files are using them.

1. Select **Home > Find and Replace**. Then in the Find and Replace in Files window pane, click the **Find Elements** tab. Alternatively, you can press **CTRL+N** on your keyboard.
2. In the **Find** field, click the first drop-down and choose  **Tag** if it is not already selected.
3. In the next field(s) to the right, enter or select **meta**.
4. Click **Add Row** and select **Attribute**.
5. In the **Name** field, enter or select **name** or **content**, depending on whether you want to find files containing the meta tag's name or a particular value.
6. In the **Value** field, enter the name of the meta tag or a specific value that you want to include in the results. (You might need to refer to the meta tag set or file properties to retrieve the precise name or value.)
7. If you want to include another set of criteria in the search, click **Add Row**, select **Attribute**, and complete the **Name** and **Value** fields for that row as well.
8. Look at the **Preview** field to make sure the selected options will do what you expect.
9. Click in the **Find in** field and select one of the options.
10. Click in the **File types** field and select one of the options.
11. (Optional) You can expand **Options** and choose additional features.
12. Click **Find All**. Flare Desktop finds and lists all occurrences of the element in the Find Results window pane at the bottom of the user interface.

Finding Meta Tag Text

You can use the Find Text window pane to search for files containing specific meta tag markup.

1. Select **Home > Find and Replace**. In the Find and Replace in Files window pane, make sure the **Find Text** tab is selected.
2. In the **Find** field, enter the meta tag markup you want to search (e.g., meta name="Video Links" content="Overview Video,Procedure Video"). (You might need to open one of your files containing meta tags to see exactly how the markup is written.)
3. Click in the **Find in** field and select one of the options.
4. Click in the **File types** field and select one of the options.
5. Expand **Options** and select **Find in source code**. You can select any of the other options that you want as well.
6. Click **Find All**. Flare Desktop finds and lists all occurrences of the text in the Find Results window pane at the bottom of the user interface.



NOTE If you want to perform an advanced search for meta tags, you can use wildcards or regular expressions as well.

Viewing Description Meta Tag Text in the File List Window Pane

If you add "description" meta tags to topics, you can use the File List window pane to see the text for each file.

1. Select **View > File List**.
2. From the **Filter** drop-down in the local toolbar, select **Topic Files (*.htm;*.html)**.
3. Notice the text in the **Description** column. (If this column is not shown, click  in the local toolbar to add it.)



Filter: *.htm;*.html											
	Name	Path	Size	Date Modified	Status	User	Title	Description	Class	S	
	☐ AKC-Canine-Good-Citiz...	Content\C-Trainin...	504 b...	5/11/2022 11:30:40 AM							
	☐ Australian-Shepherds.htm	Content\B-Breeds\	1.78 KB	5/11/2022 11:39:47 AM				The Australian Shepherd is a breed...			
	☐ Beagles.htm	Content\B-Breeds\	1.9 KB	5/11/2022 11:39:47 AM				The beagle is a breed of small sce...			
	☐ Boxers.htm	Content\B-Breeds\	1.61 KB	5/11/2022 11:30:40 AM				The Boxer is a medium to large, sh...			
	☐ Bulldogs.htm	Content\B-Breeds\	1.65 KB	5/3/2022 12:35:14 PM							
	☐ Company.htm	Content\D-Referen...	669 b...	5/3/2022 12:35:14 PM							
	☐ Competition-Training.htm	Content\C-Trainin...	702 b...	5/11/2022 11:30:40 AM							

I Meta Tags and Micro Content

Supported In:



Micro content is short, concise information that stands alone and is easily consumable. In Flare Desktop, it begins with the creation of a collection of brief *phrases* and corresponding *responses*, such as questions and answers. After generating HTML5 output, these phrase/response combinations can be used in different ways as users interact with your output. For example, it can greatly improve the user experience when people search in your HTML5 output. It can also be used to create field-level context-sensitive Help.

One of the most powerful ways to use micro content is to integrate it with your meta tags. This gives you more flexibility and control over what micro content displays in the output and where.

For example, when you implement any of the micro content containers in your output (featured snippets, Knowledge Panel, micro content proxies), you will see options that let you select meta tag names and values that you've set up.

To gain a better understanding of micro content and how it might be used with your meta tags , we recommend you walk through the following tutorials (see the Help system):

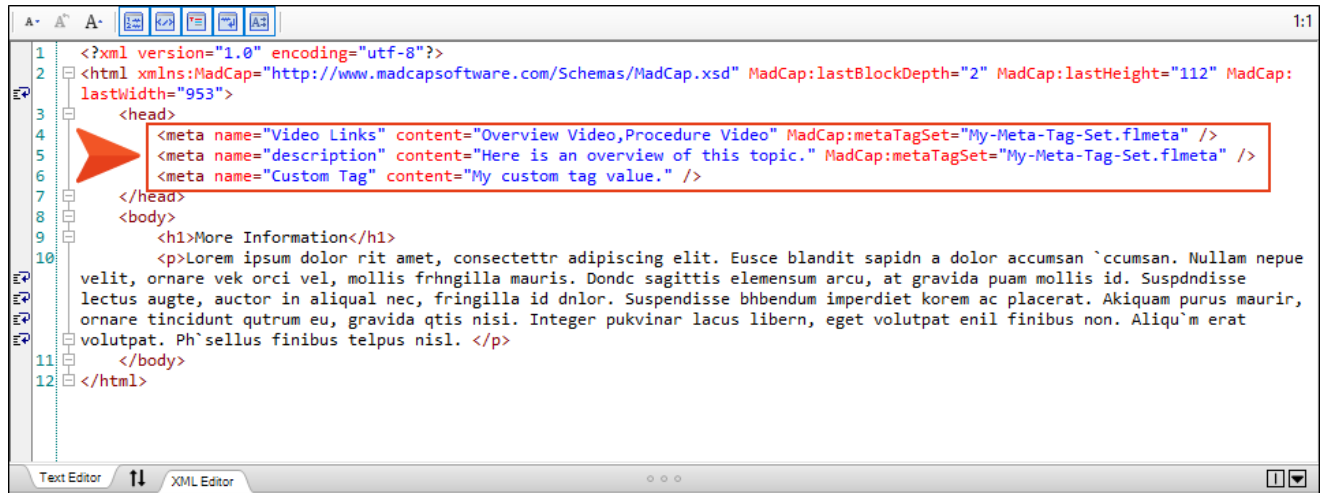
- Micro Content Tutorial—Basic
- Micro Content Tutorial—Advanced

Meta Tags in the Code

When a value has been explicitly added to a file, you can view the meta tag in the Internal Text Editor. It is contained within the <head> tag and always has the following structure.

```
<meta name="[Meta Tag Name]" content="[Meta Tag Value(s)]">
```

If multiple values are associated with the meta tag, they will be separated by commas. Also, if the meta tag originates from a meta tag set, that information will be included in the markup as well.



When you generate web-based output, you can view the page source and see the meta tags applied to the relevant content files (e.g., template pages, topics, snippets). You will see meta tags that were explicitly set in the file, any that were inherited or derived from other files (e.g., a topic contains multiple snippets and therefore shows the meta tags originally applied to those files), and any added automatically by Flare Desktop (e.g., viewport).

```

<!DOCTYPE html>
<html xmlns:MadCap="http://www.madcapsoftware.com/Schemas/MadCap.xsd" lang="en-us" xml:lang="en-us" class="_Skins_Side_Navigation" data-mc-
  <head>
    <meta name="viewport" content="width=device-width, initial-scale=1.0" />
    <meta charset="utf-8" />
    <meta http-equiv="X-UA-Compatible" content="IE=edge" />
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <meta name="Video Links" content="Getting Started Video,Overview Video,Procedure Video" />
    <meta name="description" content="This is an overview for this topic." />
    <meta name="My Meta Tag" content="This tag was created in the meta tag set file." />
    <meta name="Cool Meta Tag" content="Value for snippet 1.,Value for snippet 2." />
    <meta name="Custom Tag" content="Here is my custom tag value." /><title>Getting Started</title>
    <link href=".../Skins/Default/Stylesheets/Slideshow.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/TextEffects.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/Topic.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/Components/Styles.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/Components/Tablet.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/Components/Mobile.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Default/Stylesheets/Components/Print.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Fluid/Stylesheets/foundation.6.2.3.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Fluid/Stylesheets/Styles.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Fluid/Stylesheets/Tablet.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Fluid/Stylesheets/Mobile.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Skins/Fluid/Stylesheets/Print.css" rel="stylesheet" type="text/css" data-mc-generated="True" />
    <link href=".../Resources/Stylesheets/Styles.css" rel="stylesheet" type="text/css" />
    <script src=".../Resources/Scripts/jquery.min.js" type="text/javascript">
    </script>
    <script src=".../Resources/Scripts/purify.min.js" type="text/javascript" defer="defer">
    </script>
    <script src=".../Resources/Scripts/require.min.js" type="text/javascript" defer="defer">
    </script>
    <script src=".../Resources/Scripts/require.config.js" type="text/javascript" defer="defer">
    </script>
    <script src=".../Resources/Scripts/foundation.6.2.3_custom.js" type="text/javascript" defer="defer">
    </script>
    <script src=".../Resources/Scripts/plugins.min.js" type="text/javascript" defer="defer">
    </script>
    <script src=".../Resources/Scripts/MadCapAll.js" type="text/javascript" defer="defer">
    </script>
  </head>
  <body>
    <div class="foundation-wrap off-canvas-wrapper">
      <div class="off-canvas-wrapper-inner" data-off-canvas-wrapper="">
        <aside class="off-canvas position-right" role="navigation" id="offCanvas" data-off-canvas="" data-position="right" data-mc-
          <ul class="off-canvas-accordion vertical menu off-canvas-list" data-accordion-menu="" data-mc-back-link="Back" data-mc-

```

I Where Meta Tags Can Be Added

You can set meta tags at any of the following levels in a Flare project:

- Meta Tag Set
- Project
- Target
- Template page
- Snippet
- Topic
- Micro content file
- Micro content phrase
- Image
- Multimedia



NOTE Placing meta tags on most of these files can be useful for both content management and the output. However, the benefit of placing meta tags on image and multimedia files is really limited to just content management.

I Meta Tag Inheritance and More

One of the things that makes meta tags so powerful and versatile is that there is a system of inheritance when you create meta tags. It's important to understand the basics of this when working with meta tags in your project.

Meta Tag Inheritance Chain

Meta tag settings can start in a meta tag set file (if you create one) and work their way down to lower level content, with files inheriting the tags and values along the way. This allows you to single-source content as much as possible, rather than having to set the same meta tags and values manually in many locations.

If you override the meta tag value at a certain file level, that new value might then be inherited by other file types below it in the hierarchy. However, this is not always the case. Also, some types of files might inherit meta tag values but not pass them on to other files. And then there are snippets, which are somewhat unique due to their nature.

The basic inheritance chain for web-based outputs is as follows.

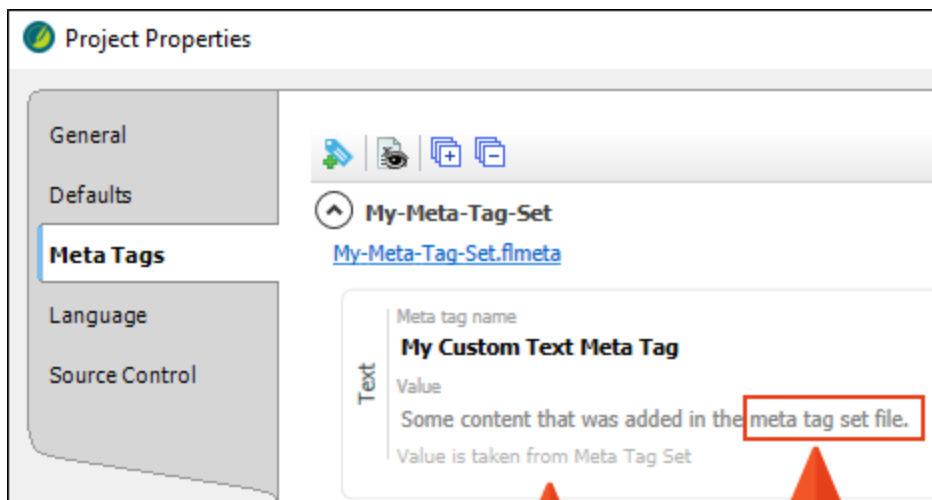
Meta Tag Set > Project > Target > Template Page > Snippet > Topic > Micro Content File > Micro Content Phrase

☆ **EXAMPLE** In the meta tag set file, you have created a text meta tag as follows.



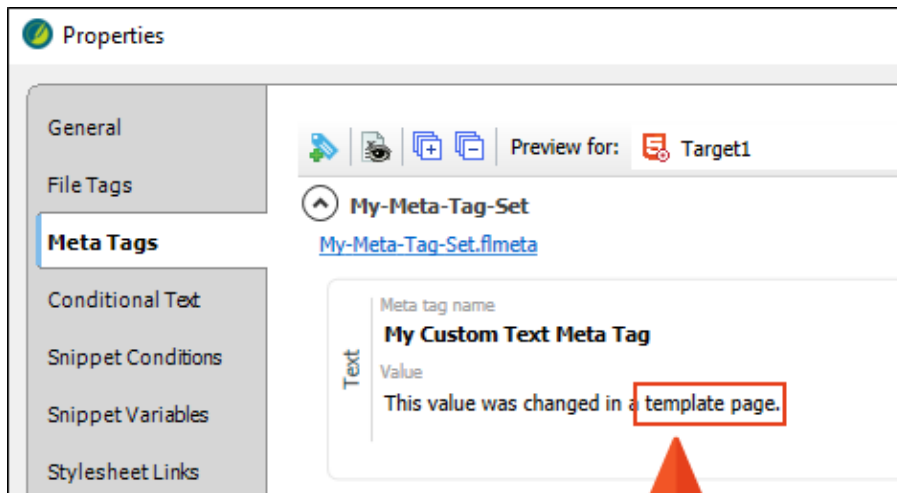
A screenshot of a meta tag set file. It shows a table with two columns: 'Meta tag name' and 'Value'. The 'Meta tag name' column contains the text 'My Custom Text Meta Tag'. The 'Value' column contains the text 'Some content that was added in the meta tag set file.' A red arrow points to the bottom of the table.

If you open the properties for any of the file types mentioned above, you'll see this same meta tag and its value, along with text indicating it is coming from the meta tag set file.

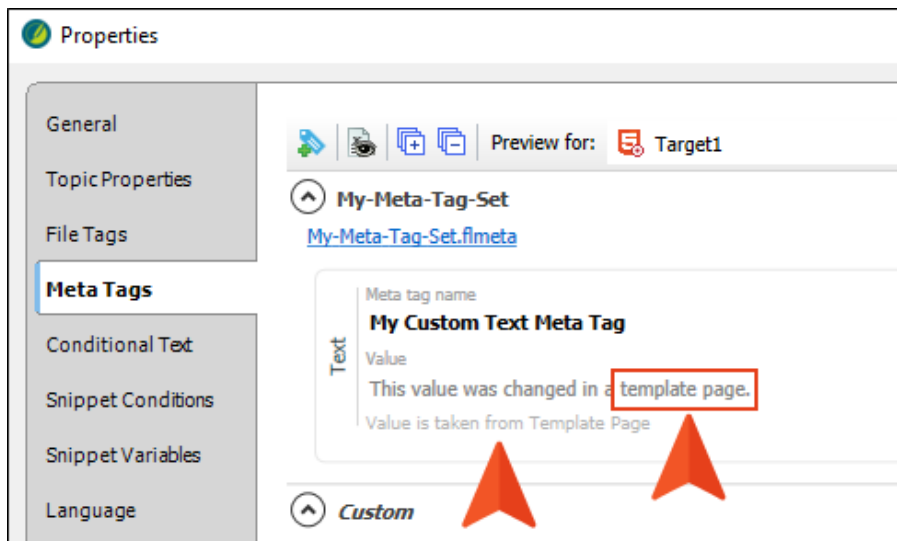


A screenshot of the 'Project Properties' dialog box. The 'Meta Tags' tab is selected. It shows a section for 'My-Meta-Tag-Set' with a link to 'My-Meta-Tag-Set.flmeta'. Below this, a table displays the meta tag information. The 'Meta tag name' is 'My Custom Text Meta Tag'. The 'Value' is 'Some content that was added in the meta tag set file.' A red box highlights the text 'meta tag set file.' in the value. Below the table, it says 'Value is taken from Meta Tag Set'. Two red arrows point to the bottom of the dialog box.

- ☆ You might decide to open the properties for a template page and override the value for that meta tag.



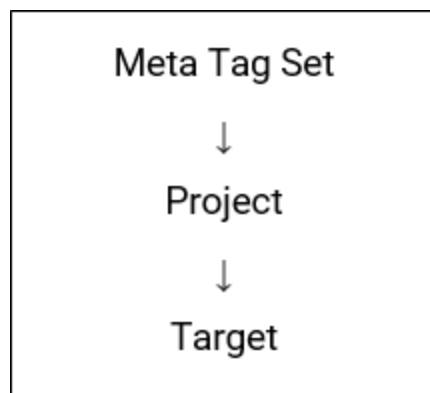
If you look at the properties for a topic that is associated with that template page, you will see that the value is now inherited from the template page instead of the meta tag set file, along with a message indicating this.



 **NOTE** Inheritance is useful when output is generated. For example, if certain meta tag values are set on a template page, all topics using that template page will automatically show that meta tag value in the output (e.g., when viewing the page source).

However, inheritance does not really come into play with content management in source files. If you wanted to find all of the files using a particular meta tag, only files where the meta tag was explicitly set would be part of that collection of information. Say you set a meta tag value on a template page but not explicitly on any topics. If you were to open the Used Meta Tags window pane (via the Analysis ribbon), you would see the template page listed but not the topics that are associated with that template page.

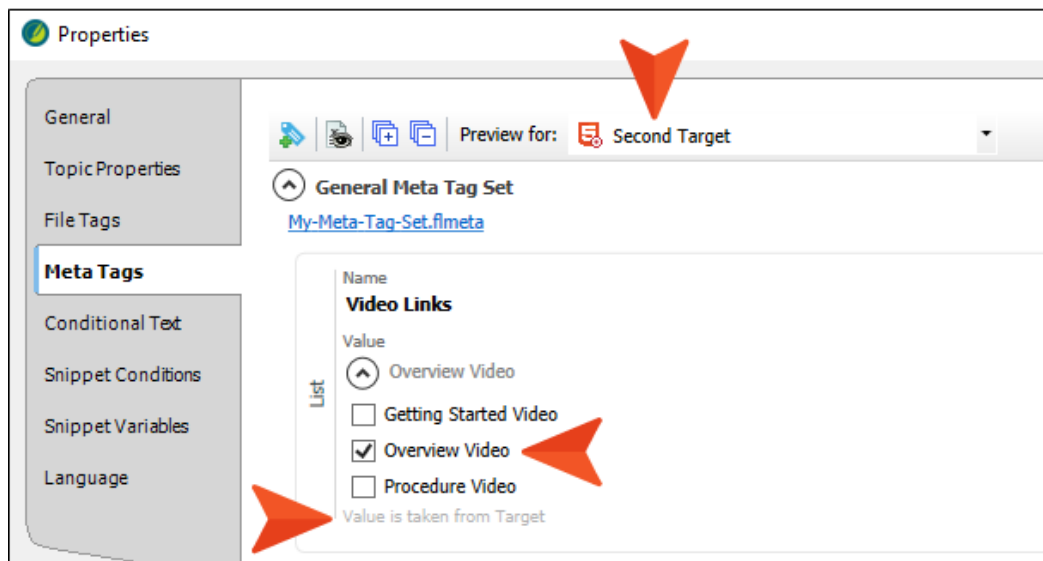
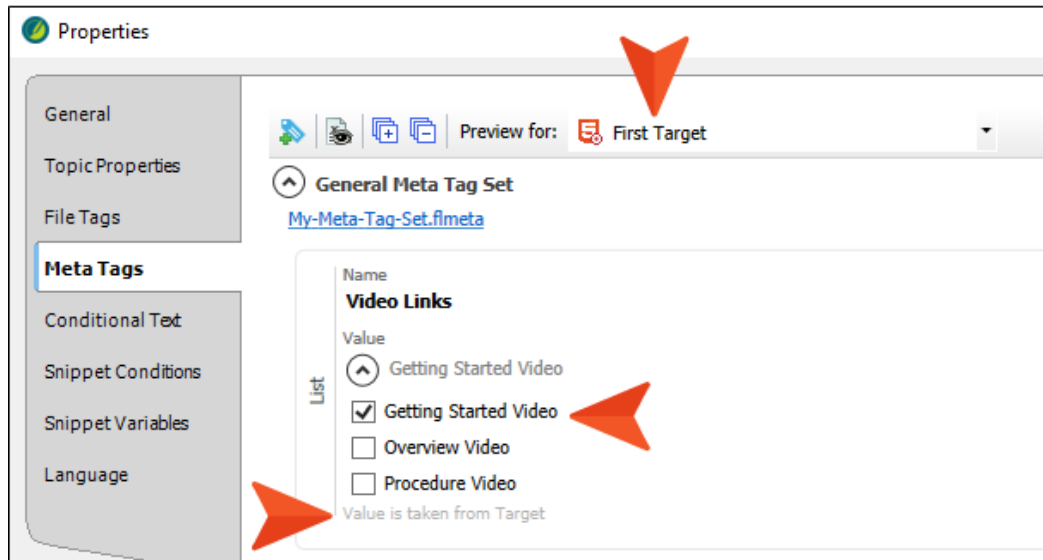
 **NOTE** PDF and Word outputs do not use meta tags from content files, so the chain of inheritance in that case is as follows.



 **NOTE** Although you can add meta tags to images and multimedia files, they do not inherit values from other files.

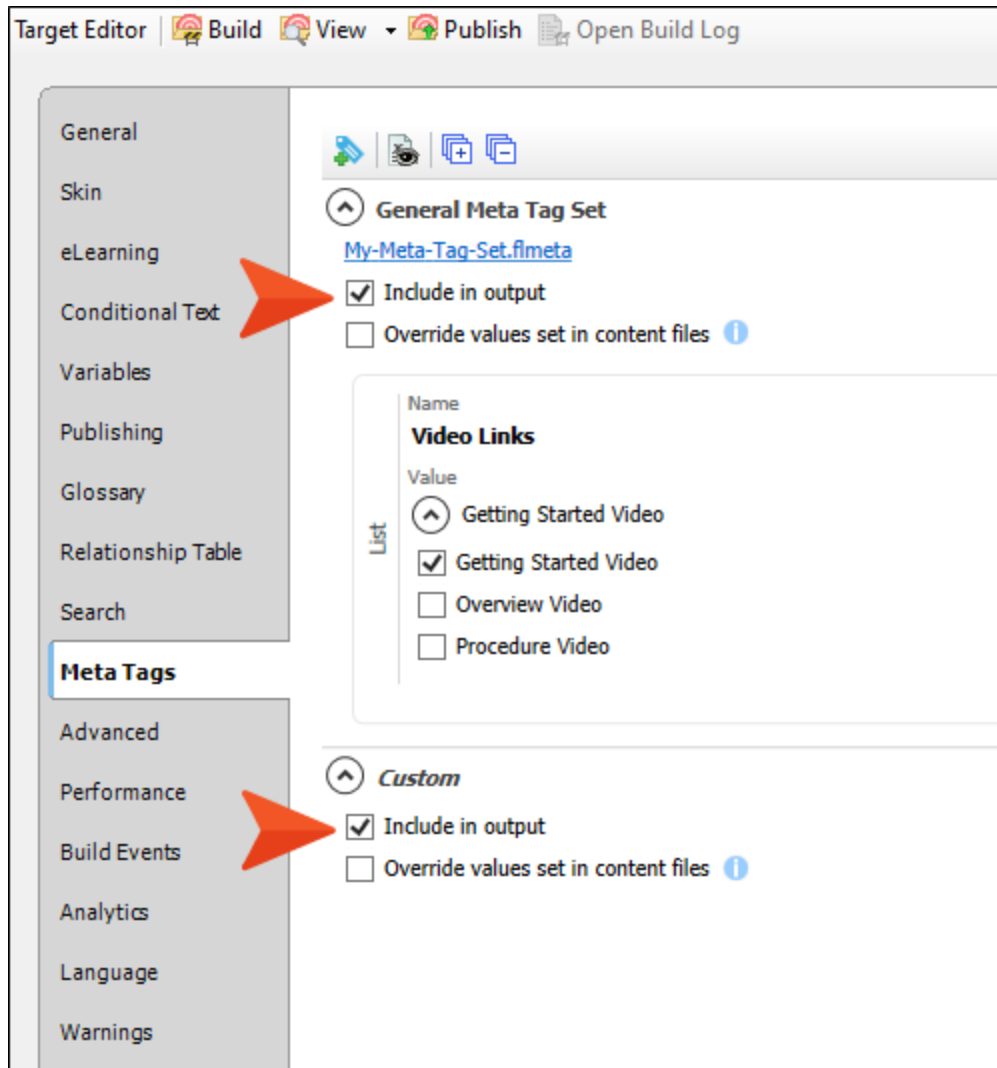
Meta Tags and Targets

It's possible to set different values for the same meta tag in multiple targets. That is why, once you open the properties for a file below the target level, you will see a drop-down letting you choose a target. This lets you see the value that will be used for a specific target.



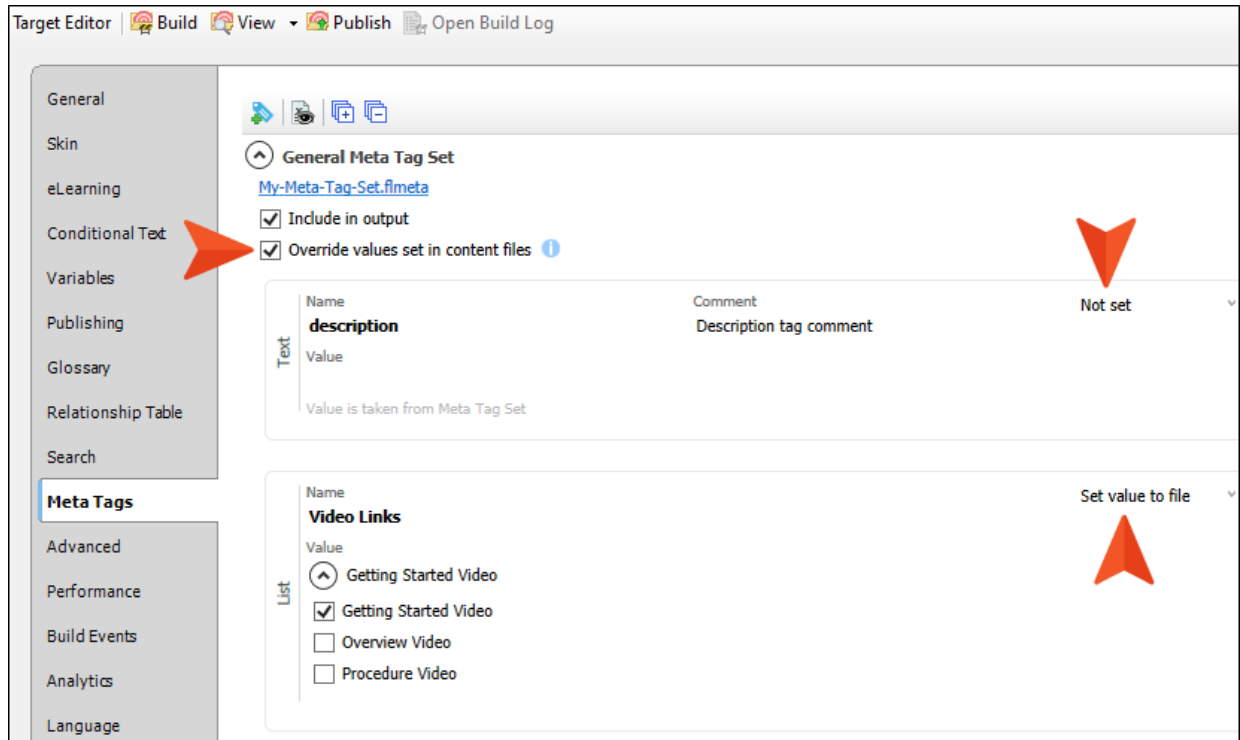
In addition, when you look at the Meta Tags tab in the Target Editor, you will see a couple of options unique to targets:

- **Include in output** This simply lets you control whether you want meta tags to be part of the generated output. Usually, you will want this enabled, but just in case you want to exclude meta tags from the output, you can disable this option.



■ **Override values set in content files** When this option is enabled:

- If "Set to value" is selected, the explicit value in the target will be used, regardless of what value might be set on content files.
- If "Not set" is selected, the explicit value in content files will be used.



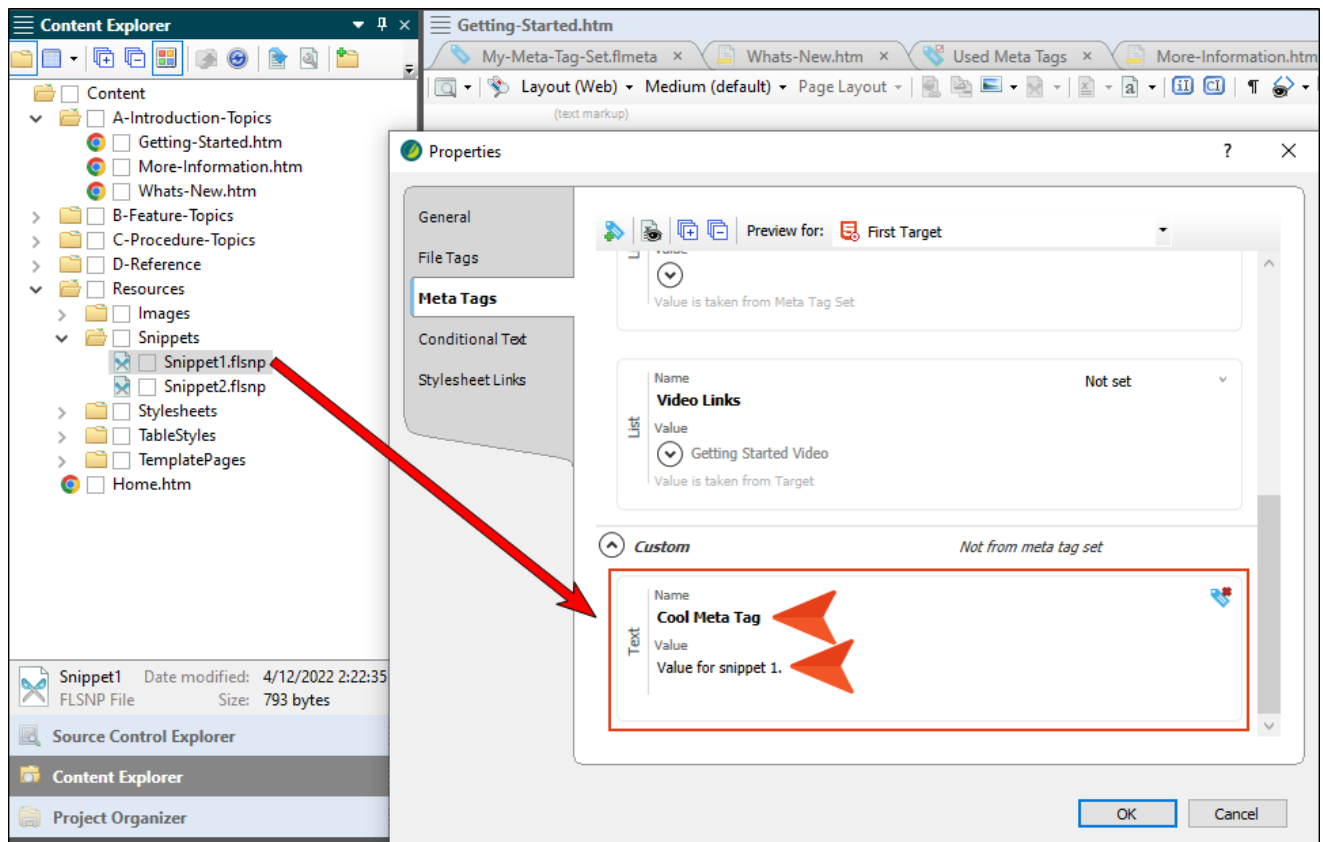
Meta Tags for Micro Content Files and Phrases

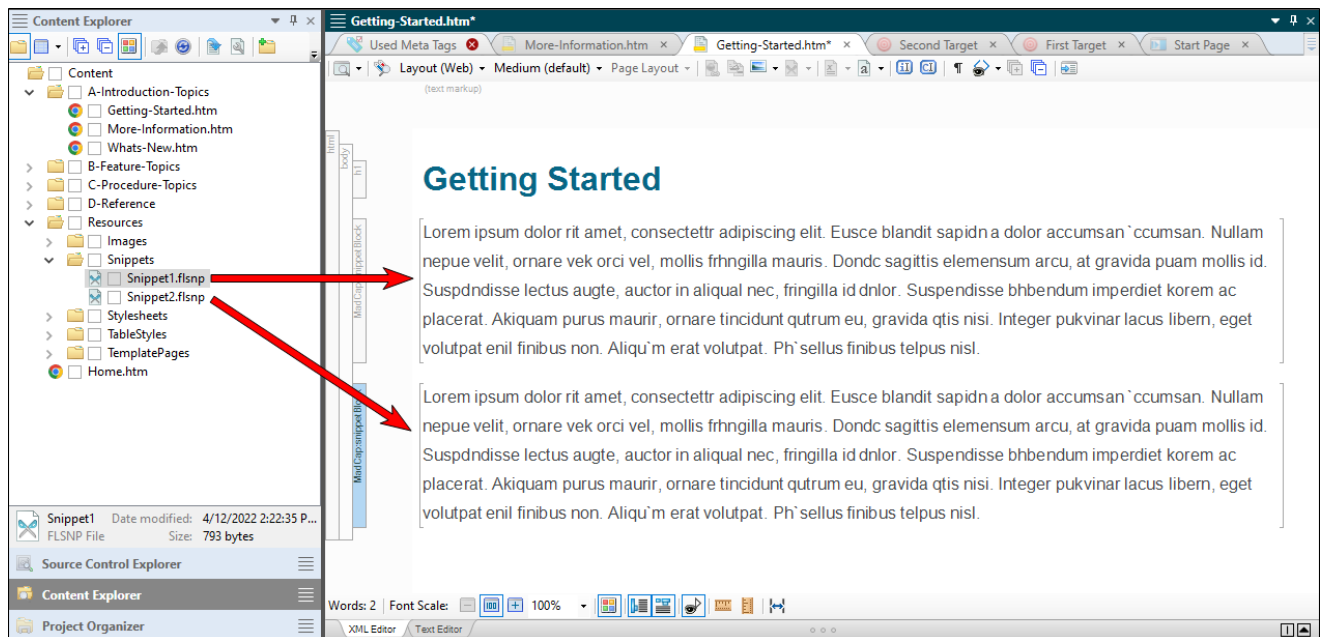
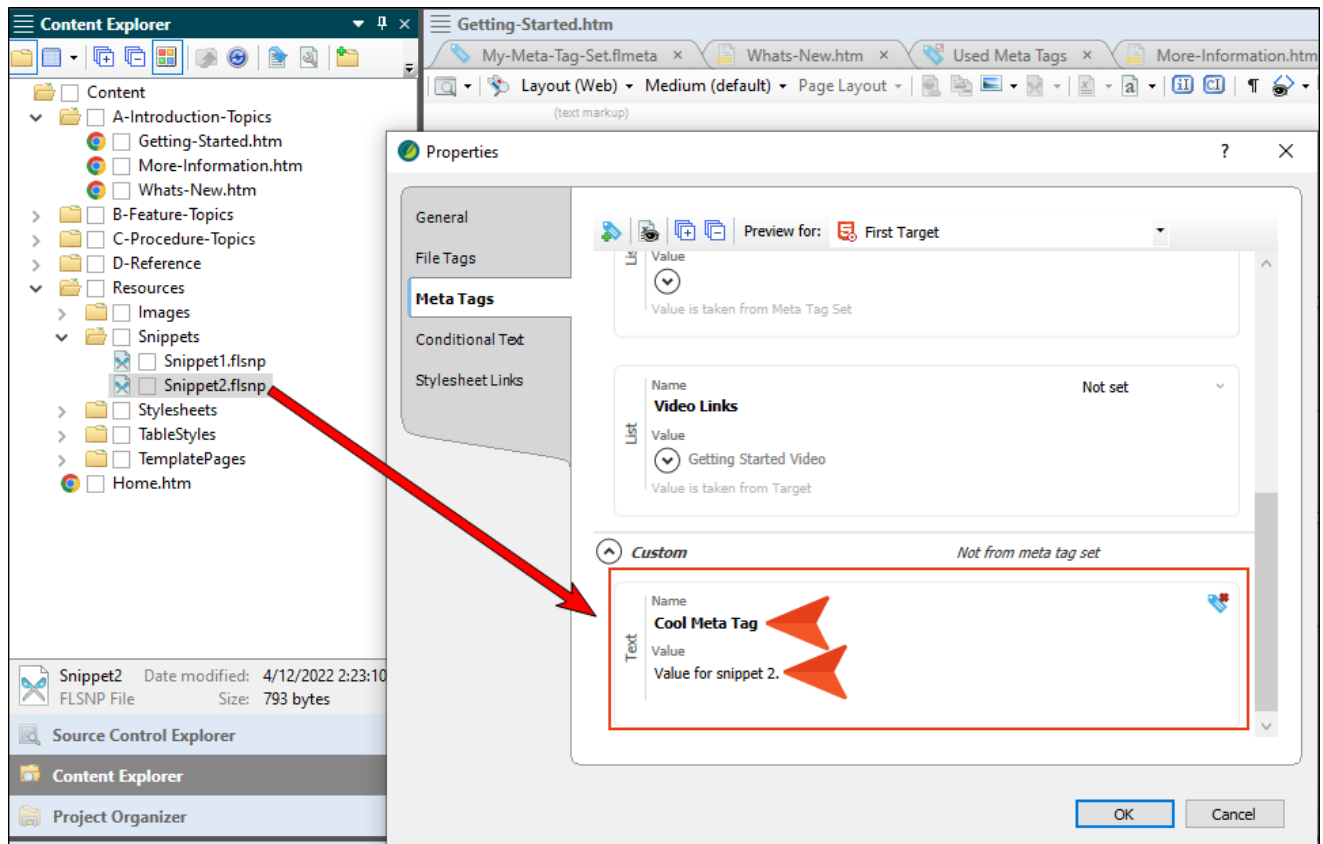
A micro content file and its phrases can inherit a meta tag value from a meta tag set, project, or target. It does not inherit values from template pages or topics. If you set a meta tag value in the properties for a micro content file, the micro content phrases will inherit that value.

Meta Tags and Snippets

You can also set meta tags on snippet files. A snippet can inherit a meta tag value from a meta tag set, project, or target.

If you set the value for a meta tag in a snippet's properties, it is possible that a related topic could derive that value, which is different than inheritance. A topic could contain multiple snippets that have different values for the same meta tag.

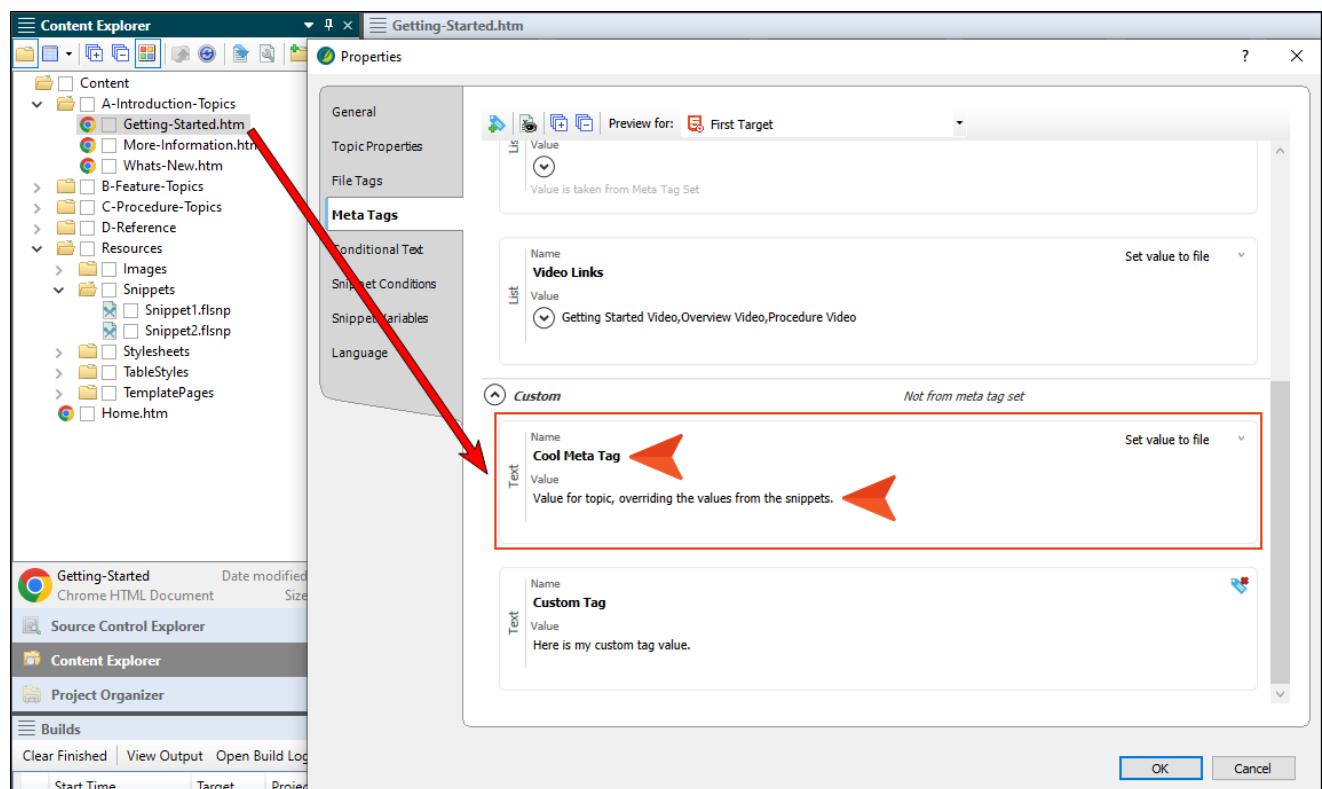




In a case such as this, when you look at the page source in the output, the topic will include each of those values.

```
<!DOCTYPE html>
<html xmlns:MadCap="http://www.madcapsoftware.com/Schemas/MadCap.xsd" lang="en-us" xml:lang="en-us" class="
  <head>
    <meta name="viewport" content="width=device-width, initial-scale=1.0" />
    <meta charset="utf-8" />
    <meta http-equiv="X-UA-Compatible" content="IE=edge" />
    <meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
    <meta name="Video Links" content="Getting Started Video,Overview Video,Procedure Video" />
    <meta name="description" content="This is an overview for this topic." />
    <meta name="My Meta Tag" content="This tag was created in the meta tag set file." />
    <meta name="Cool Meta Tag" content="Value for snippet 1.,Value for snippet 2." />
    <meta name="Custom Tag" content="Here is my custom tag value." /><title>Getting Started</title>
    <link href="../../Skins/Default/Stylesheets/Slideshow.css" rel="stylesheet" type="text/css" data-m
    <link href="../../Skins/Default/Stylesheets/TextEffects.css" rel="stylesheet" type="text/css" data-
```

However, if you manually set the value for the meta tag in the topic's properties, it will use that instead.



Meta Tags for Images and Multimedia

Unlike the other file types, there is no inheritance with meta tags on images and multimedia files, such as videos.

Also, meta tags on these types of files are not used in the output. Instead, they are used only for content management purposes (see "Meta Tags and Content Management" on page 13).

Meta Tag Inheritance Table

This illustrates which files inherit meta tag values from other files.

Meta Tag Value Added To...						
	Meta Tag Set File	Project	Target	Template Page	Topic	Micro Content File
Inherited by Project?	Yes					
Inherited by Target?	Yes	Yes				
Inherited by Template Page?	Yes	Yes	Yes			
Inherited by Topic?	Yes	Yes	Yes	Yes		
Inherited by Micro Content File?	Yes	Yes	Yes	No	No	

Meta Tag Value Added To...						
	Meta Tag Set File	Project	Target	Template Page	Topic	Micro Content File
Inherited by Micro Content Phrase?	Yes	Yes	Yes	No	Maybe ¹	Yes
Inherited by Snippet?	Yes	Yes	Yes	No	No	No
Inherited by Image?	No	No	No	No	No	No
Inherited by Multimedia File?	No	No	No	No	No	No

¹If a micro content phrase is linked to a topic, the phrase will inherit meta tag values from that topic. Otherwise, it will not inherit those meta tag values.

Meta Tags in PDF, Word, and PPTX Outputs

PDF, Word, and PowerPoint (PPTX) outputs are not HTML web pages, so meta tags are treated a bit differently. In PDF, Word, and PPTX targets, there are tabs devoted to their options. On those tabs, you will see document property fields for the PDF, Word, or PPTX file.

Target Editor | Build | View | Publish | Open Build Log

General

Skin

Conditional Text

Variables

Publishing

Glossary

Relationship Table

Meta Tags

Advanced

Build Events

Language

PDF Options

Warnings

Image Compression

☐ Downsample images above: 300 pixels per inch

Compression: Automatic

Quality: Maximum

Document Properties

Title: My PDF Title

Author: Jane Doe

Subject: My PDF Subject

Keywords: my keywords

☒ Include non-TOC bookmarks in the bookmarks pane

☐ Create named destinations for bookmarks

☐ Include Crop and Registration Marks

☐ Convert RGB Colors to CMYK

☐ Convert spot colors to black and white

Target Editor | Build View Publish Open Build Log

General

Skin

Conditional Text

Variables

Publishing

Glossary

Relationship Table

Meta Tags

Advanced

Build Events

Language

MS Word Options

Warnings

Document Properties

Title: My Word Title

Author: John Doe

Subject: My Word Subject

Keywords: my keywords

Category: My category

Comments: Here are some misc comments.

Company: FictionSoft

Manager: Jane Doe

Hyperlink base:

Output Options

☐ Embed images in output

☐ Enable review mode in output

☐ Generate PDF for MS Word output ⓘ

☐ Generate XPS for MS Word output ⓘ

Target Editor | Build View Publish Open Build Log

General

Skin

Conditional Text

Variables

Publishing

Glossary

Relationship Table

Meta Tags

Advanced

Build Events

Language

PowerPoint Opti...

Warnings

Document Properties

Title: My PowerPoint Title

Author: John Doe

Subject: My PowerPoint Subject

Keywords: My keywords

Category: My category

Comments: Here are some comments.

Company: XYZ Industries

Manager: Jane Doe

Hyperlink base:

If your output includes meta tags, these can be found along with your other properties in the final PDF, Word, or PowerPoint document.

PDF Document Main Properties

▼

Document Properties

Description

Security

Fonts

Custom

Advanced

Description

File: PDF.pdf

Title: My PDF Title

Author: Jane Doe

Subject: My PDF Subject

Keywords: my keywords

Created: 4/13/2022 9:44:47 AM

Modified: 4/13/2022 9:44:47 AM

PDF Document Custom Properties (i.e., those from meta tags in your project)

Document Properties

Description Security Fonts Custom Advanced

Custom Properties

Name: Add

Value: Delete

Name	Value
My Meta Tag	Here is a description of this text meta tag.

Word Document Main Properties

Properties ▾

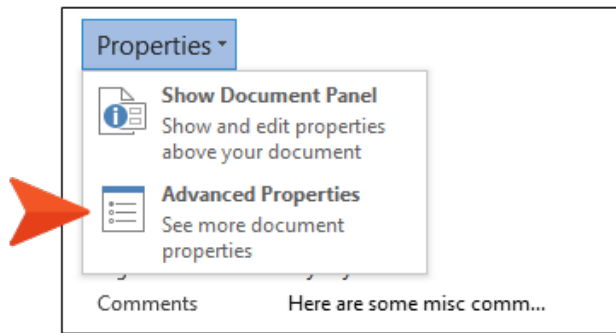
Size 12.3KB

Pages 15

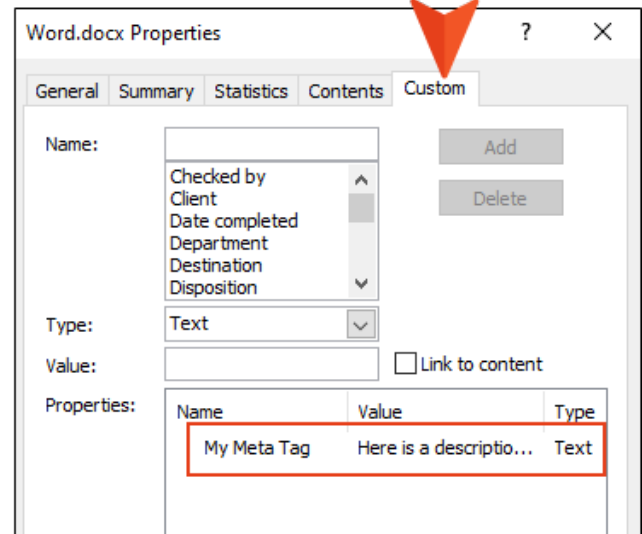
Words 1079

Total Editing Time 0 Minutes

Title	My Word Title
Tags	my keywords
Comments	Here are some misc comm...



Word Document Custom Properties (i.e., those from meta tags in your project)



PowerPoint Document Main Info Properties

Properties ▾

Size	1.78MB
Slides	12
Hidden slides	0
Title	My PowerPoint Title
Tags	My keywords
Categories	My category

Related Dates

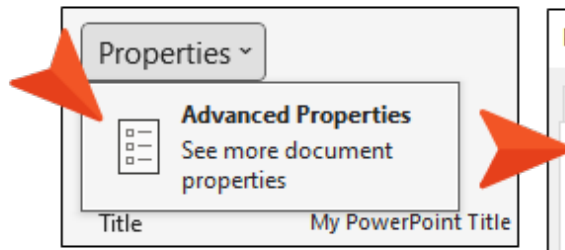
Last Modified	Today, 2:40 PM
Created	Today, 2:40 PM
Last Printed	Today, 7:40 AM

Related People

Author	 John Doe
	Add an author

Last Modified By	Not saved yet
------------------	---------------

PowerPoint Document Advanced Properties



Properties ▾

Advanced Properties
See more document properties

Title: My PowerPoint Title

PowerPoint.pptx Properties ? ×

General Summary Statistics Contents Custom

Title: My PowerPoint Title

Subject: My PowerPoint Subject

Author: John Doe

Manager: Jane Doe

Company: XYZ Industries

Category: My category

Keywords: My keywords

Comments: Here are some comments.

Hyperlink base:

Template:

☒ Save preview picture

Main Activities for Meta Tags

Some activities are particularly common and important when it comes to this feature.

This chapter discusses the following:

- Creating Meta Tag Sets45
- Adding Copyright Metadata to Online Topics52
- Meta Descriptions for Topics54
- Setting and Overriding Meta Tag Values57
- Creating Custom Meta Tags58

I Creating Meta Tag Sets

You can add meta tag sets to your project to set up a schema of meta tags to be used at various file levels.

There are three categories of meta tags that are available: text, list, and file tags.

A meta tag set isn't absolutely necessary to add text meta tags, because you can add those at any file level that supports meta tags. However, if you want to use lists or file tags, you need to set them up first in a meta tag set. The values associated with them will then become available at the various file levels. Also, it's a good idea to add a meta tag set simply to make the default "description" meta tag available in each topic; it serves as a good reminder to provide description text in each topic for SEO purposes.

You might decide you only need one meta tag set, or you might want to create multiple meta tag sets to help organize your content.

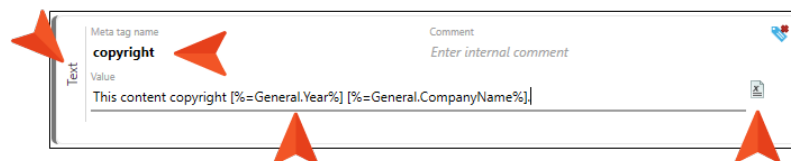
How to Add a Meta Tag Set File

1. In the Project Organizer, right-click on the **Advanced** folder and from the context menu select **Add Meta Tag Set**.
2. In the **File Type** field at the top, make sure **Meta Tag Set** 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. (Optional) If you want to place the file into a subfolder previously created in the Content Explorer or Project Organizer, in the **Folder** field click  and select the subfolder. Otherwise, keep the default location.
5. In the **File Name** field, type a new name for the meta tag set.
6. (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**.
7. (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**.
8. Click **Add**. The meta tag set is added to the Advanced folder in the Project Organizer. The Meta Tag Set Editor opens to the right.

How to Complete a Meta Tag Set

1. (Optional) At the top of the Meta Tag Set Editor, you can complete the **Meta Tag Set Name** field. This helps to distinguish the meta tag set from others later when you open a file's properties to make selections. If you do not provide a name here, Flare Desktop will use the meta tag set file name in the file properties.
2. (Optional) You can also complete the **Meta Tag Set Description** field. This is used only for internal purposes (i.e., to explain the purpose of the meta tag set to all authors on your team).
3. (Optional) Flare Desktop provides an initial text meta tag named "description" (which is a standard meta tag used by search engines). It's a good idea to include a description meta tag value for each of your topics, so you might want to leave this initial meta tag just as it is and then set the specific value later in the properties of each topic. Alternatively, you can click  to delete the meta tag.
4. In the local toolbar of the editor, click , select one of the types of tags, and complete the fields.
 - **Text** This is a simple text string. Give the tag a name, an optional internal comment, and a value. You can use the value that is set in the meta tag set or you can override the value at a lower file level. As mentioned above, "description" is one the most commonly used types of text meta tags, but you can add many other kinds of text meta tags as well.

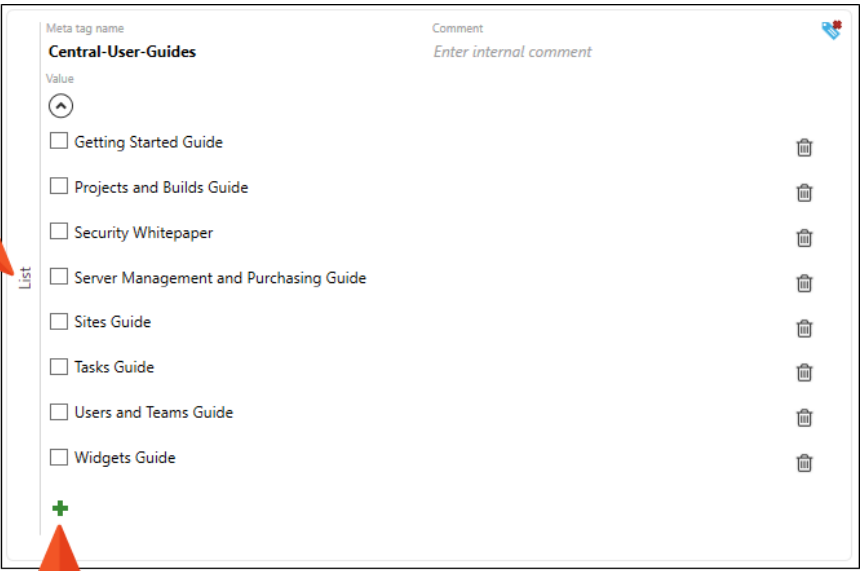
☆ **EXAMPLE** You want to add a copyright to each file. So in the meta tag set file, you create a new text meta tag, naming it copyright. You add a value, such as the following, using the variable button to add a date variable which automatically updates the year, as well as another variable for your company name.



The screenshot shows the Meta Tag Set Editor interface. It has a 'Text' tab selected. The 'Meta tag name' field contains 'copyright'. The 'Comment' field contains 'Enter internal comment'. The 'Value' field contains 'This content copyright [%=General.Year%] [%=General.CompanyName%]'. There are four red arrows pointing to the 'Meta tag name' field, the 'Comment' field, the 'Value' field, and the 'Add variable' button (a small icon with a plus sign and a variable name) in the bottom right corner of the editor.

- **List** This is a meta tag containing a set of available values from which to choose at the file properties level. Give the meta tag a name and optional internal comment. Click  at the bottom of the area to add a new item in the list.

☆ **EXAMPLE** You have a list of PDFs that you've created, and you want to integrate meta tags with micro content to easily display links to the appropriate PDF(s) on the side of each online topic. Rather than adding a separate text meta tag for each PDF, you create a list of your PDFs in a meta tag.



The screenshot shows a configuration window for a meta tag. At the top, there are fields for 'Meta tag name' (containing 'Central-User-Guides') and 'Comment' (containing 'Enter internal comment'). Below these is a 'Value' section containing a list of items. Each item has a checkbox on the left and a trash icon on the right. The items are: 'Getting Started Guide', 'Projects and Builds Guide', 'Security Whitepaper', 'Server Management and Purchasing Guide', 'Sites Guide', 'Tasks Guide', 'Users and Teams Guide', and 'Widgets Guide'. At the bottom of the list is a green plus icon. Two red arrows point to the plus icon and the word 'List' on the left side of the list area.

Meta tag name	Comment
Central-User-Guides	Enter internal comment

Value

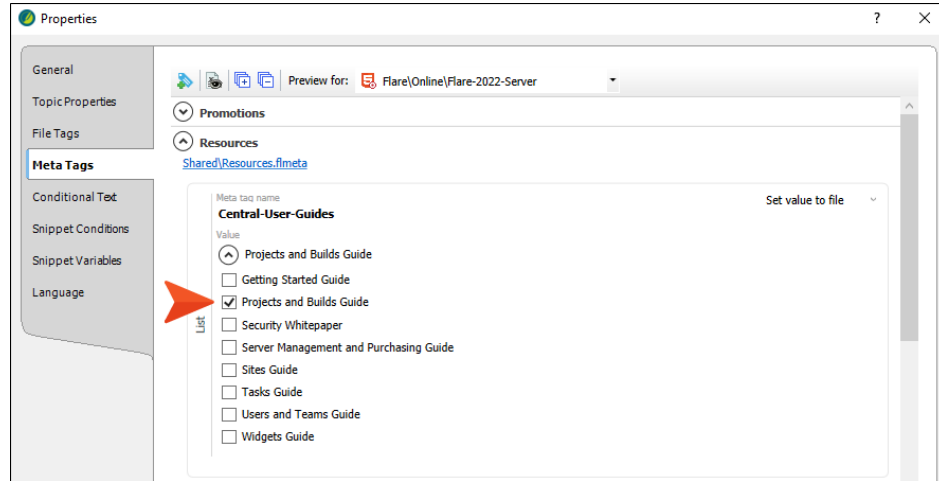
⬆

- ☐ Getting Started Guide
- ☐ Projects and Builds Guide
- ☐ Security Whitepaper
- ☐ Server Management and Purchasing Guide
- ☐ Sites Guide
- ☐ Tasks Guide
- ☐ Users and Teams Guide
- ☐ Widgets Guide

+

List

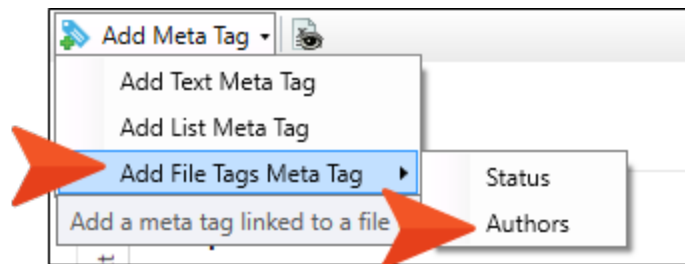
☆ Later, in the properties you associate the correct PDF value with each topic.



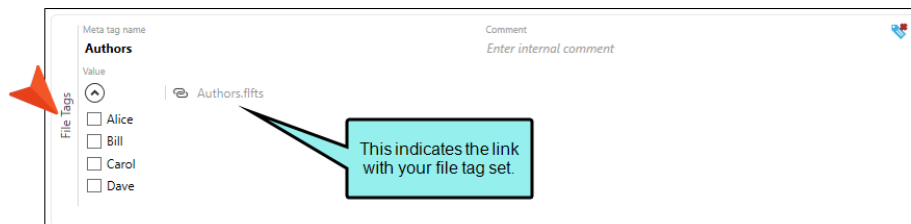
- **File Tags** This is a meta tag that is synchronized with any file tags that you might have added to your project previously. Meta tagging is the newer feature, and is recommended over file tagging. However, if you have already done significant work with file tags in the past, you can simply create a new meta tag and link it to the appropriate file tag. That way, you can leverage all of that previous work. If you need to make any modifications to a file tag, the changes will automatically be made to the meta tag as well.

From the local toolbar submenu, select the name of your file tag set. Give the resulting meta tag a name and optional internal comment.

☆ **EXAMPLE** In the past, you created a file tag set (named "Authors") to hold all the names of writers on your team. You've associated the various names from this file tag set to different topics over time. Because meta tags are more powerful and can be associated with more file types, you create a new meta tag, selecting your "Authors" file tag set.



You also name the new meta tag "Authors," just to prevent confusion.



5. Click  to save your work.

What's Noteworthy?



NOTE You cannot have more than one meta tag in a set with the same name.



NOTE If a meta tag with the same name is added to multiple tag sets—or if it appears in a meta tag set and also as a custom value in a file—each meta tag will be included in the output.

Adding Copyright Metadata to Online Topics

Supported In:



You can add copyright metadata to your topics in online output. After opening a topic in a browser, users can view the source to see the copyright information (e.g., in Chrome, right-click and select **View page source**).

How to Add Copyright Metadata to Online Topics

1. Add a meta tag set file. See "Creating Meta Tag Sets" on page 45.
2. In the local toolbar of the Meta Tag Set Editor, click , and select **Text**.
3. In the new meta tag area, provide a **Name** (e.g., copyright).
4. In the **Value** field, enter your copyright information. If you want to insert a variable in a field, you can click . The variable will appear as syntax in the field, but in the output the variable definition will be shown.

Title
Enter meta tag set title

Comment
Enter a comment describing this meta tag set

Meta tags:

Name	Comment
description	Description meta tag
copyright	<i>Enter internal comment</i>

Value
Copyright [%=General.Year%] [%=General.CompanyName%]

5. Click  to save your work.

I Meta Descriptions for Topics

Supported In:

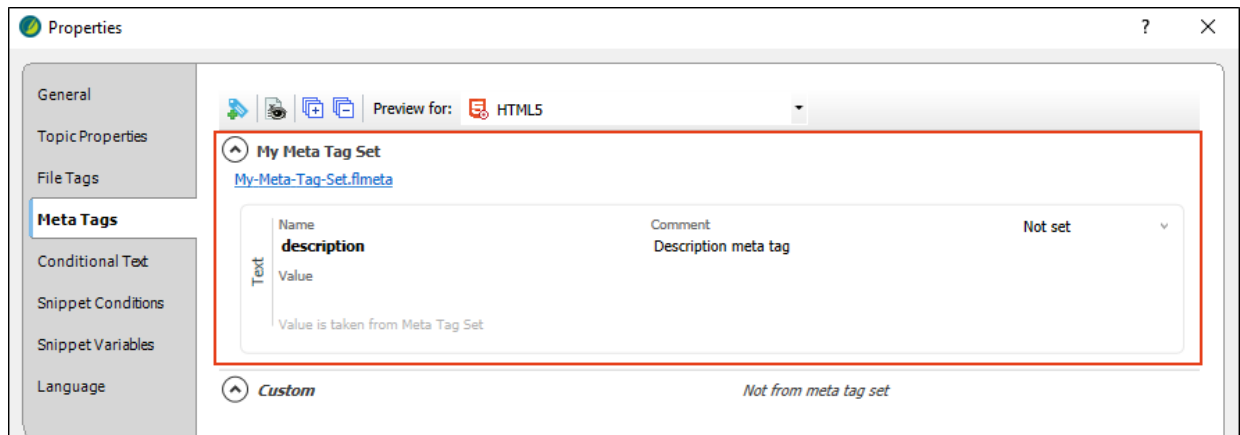


Description meta tags contain brief summaries of web pages and are recognized by all major search engines. These tags might not factor into the search rankings by all search engines, but they are still useful for search engine optimization in web-based outputs, because they can help with the click-through rate in HTML5 output. We recommend that you create a meta tag set file, which adds an empty description meta tag by default. This is faster than adding it separately to each topic. This meta tag then becomes available at lower file levels (including topics), and you can then provide the value in the topic properties.

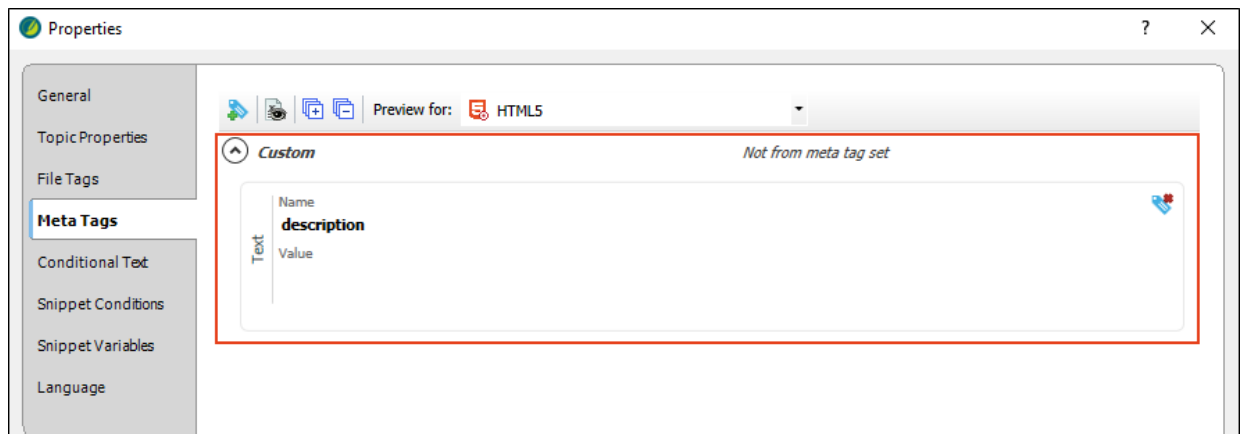
How to Add a Description Meta Tag Value for a Topic

1. (Recommended) In the Project Organizer, expand the **Advanced** folder and add a new meta tag set.
2. In the Content Explorer, right-click the topic file and select **Properties**.
3. Select the **Meta Tags** tab.

4. If you are using a meta tag set (recommended), expand it.



If you are not using a meta tag set, click  to add a new text meta tag, which is added under the Custom section. Then, enter `description` as the name.



5. In the **Value** field, enter a description for the topic.

- ✔ **TIP** When adding a value for a description meta tag, it is a good idea to ensure the following:
- It should not be too long (fewer than 155 characters if possible) or too short.
 - It should accurately reflect the contents of the page.
 - It should contain relevant keywords, although you should never "stack" keywords by simply repeating them.
 - It should be unique (i.e., not the same description as you have in lots of other topics).

6. Click **OK**.

This description is stored as metadata in the <head> tag of the topic file. The markup looks like this:

```
<meta name="description" content="This topic provides a general introduction to MadCap  
Flare, its benefits, and basic steps for getting started." />
```

📄 **NOTE** If you do not provide a meta description, Flare Desktop will use the abstract character limit to create an abstract from the text in your topic.

I Setting and Overriding Meta Tag Values

In the properties for a file or element (e.g., micro content phrase), you can set meta tag values. If a meta tag value is inherited from a file higher in the hierarchy, you can override that value.

How to Set or Override Meta Tag Values

1. Open the properties for the file or element where you want to set or override the inherited meta tag value. Usually this can be done by selecting the file or element and pressing **F4**, or by right-clicking the file or element name and choosing **Properties**. In the case of targets, just open the Target Editor. Once the properties dialog or editor is open, select the **Meta Tags** tab.
2. Locate the meta tag. You might need to expand the name of the meta tag set to find it.
3. From the **Value** field, you can make a selection (if it is a list of values), or you can type new content (if it is a text meta tag). Alternatively, you can click the **Not set** drop-down, select **Set value to file**, then change the value. For text meta tags, you can also use the variable button  to the right of the Value field if you want to insert a variable into the field.
4. If you changed the value in a properties dialog, click **OK**. If you changed it in the Target Editor, click  to save your work.

Creating Custom Meta Tags

In addition to using meta tag sets, you can add custom text meta tags to any of the files that support them in a project.

 **NOTE** List and file tag meta tags can be created only in a meta tag set; they cannot be created in other files. However, all files that support meta tags (e.g., topics, template pages) will display list and file tag meta tags originating from the meta tag set. You can then select values for them in any of the files.

How to Create a Custom Meta Tag in a File

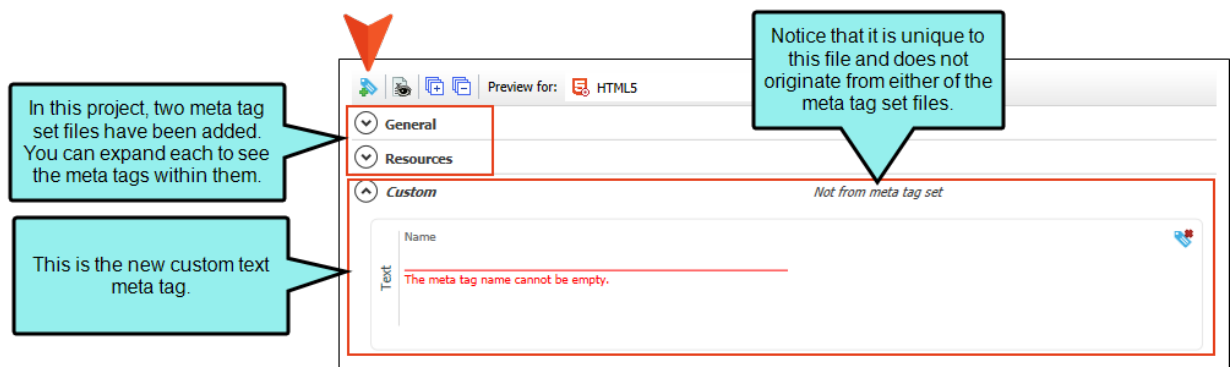
1. For most files (e.g., template pages, snippets, topics, micro content files, images, multimedia files), right-click the file in the Content Explorer and select **Properties**.

For the main project file, select the **Project** ribbon and click **Properties**.

For a target, open the Target Editor and select the **Meta Tags** tab.

For a micro content phrase, open the micro content file. Then, right-click the micro content phrase and select **Properties**.

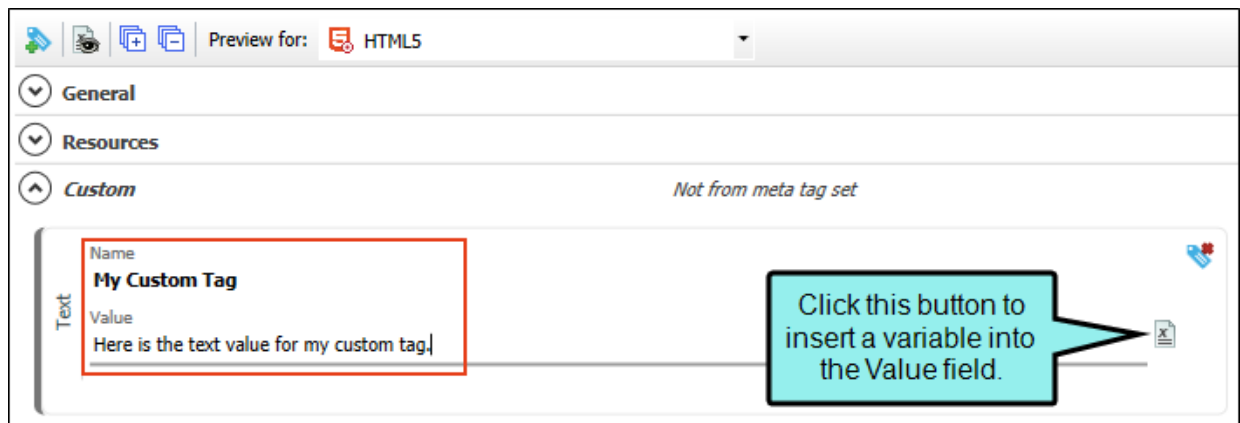
2. In the local toolbar, click . This adds an empty text meta tag in the Custom section, below any meta tags originating from meta tag sets.



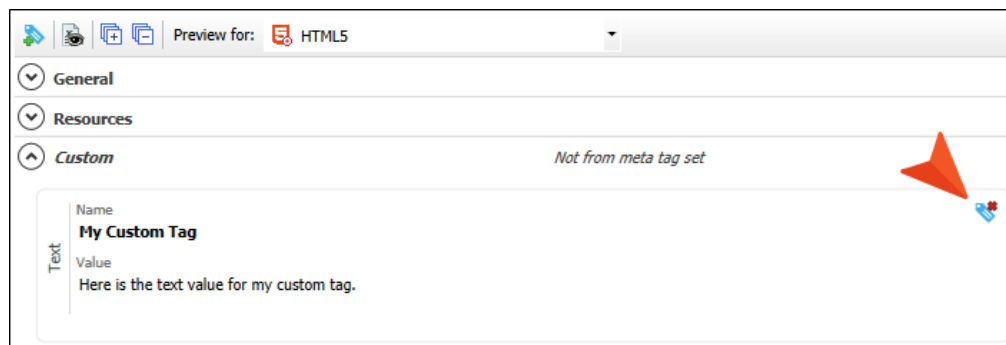
 **NOTE** In the local toolbar, you can also use buttons to show or hide any variable definitions (if any of the meta tags contain variables), as well as to expand and collapse the meta tag sections.

For files below the target level, you will also see a drop-down field for targets. This lets you see different meta tag values that might have been applied to each target.

3. Complete the **Name** field, and then the **Value** field. You can also use the variable button  to the right of the Value field if you want to insert a variable into the field.



 **NOTE** If you decide you no longer need a meta tag, you can click  to the right of it to delete it.



4. Depending on the type of file and area of the user interface, click **OK** in the dialog or click  to save your work.

Meta Tag Examples

There are so many different ways you can use meta tags. Following are a few examples that illustrate what you can accomplish with this feature, for both content management and search engine optimization. Keep in mind, the examples are a starting point and show one path for completing a task, but there are a variety of methods to implement and use meta tags.

 **NOTE** For ways to use meta tags with micro content see the Help system.

This chapter discusses the following:

- Example—Adding Description Meta Tags 61
- Example—Linking Meta Tags to File Tags63
- Example—Adding Meta Tags Using List Values67
- Example—Adding Text Meta Tags With Variables 69

Example—Adding Description Meta Tags

The description tag is one of the most impactful meta tags for search engine optimization (SEO). Although the description meta tag is not considered for result rankings by all search engines, it can influence user click-through behavior.

☆ **EXAMPLE** A documentation team wants to enhance the overall experience for users to find available information in their Help system. They establish in-house guidelines for how these meta tags should be constructed, and create brief descriptions of each web page. The team sets out to increase content discoverability (which in turn should build user trust, and increase brand awareness). They work to optimize text in search results for HTML5 output—with the goal of increasing clicks and traffic.

LEVEL

They create a meta tag set, which automatically includes a description meta tag. They leave the value empty, and add text at the topic level in the Properties dialog.

1. In the Project Organizer, right-click the **Advanced** folder and select **Add Meta Tag Set**.
2. Complete the **File Name** field and click **Add**.
3. When you want to provide the actual description text for a topic, open the Content Explorer, right-click the topic, and select **Properties**.
4. In the **Value** field, enter a description for the topic.

The screenshot shows the 'Topic Properties' dialog box with the 'Meta Tags' tab selected. On the left, there are three sub-tabs: 'File Tags', 'Meta Tags' (which is active), and 'Conditional Text'. The main area is divided into two sections: 'Meta tag name' and 'Value'. Under 'Meta tag name', the text 'description' is entered. Under 'Value', the text 'Introduction to a variety of bird groups, and how these groupings offer key differentiators for bird identification.' is entered. A red rectangular box highlights the 'Value' field. At the top right, there is a 'Comment' field with the text 'Description meta tag' and a 'Set value to file' dropdown menu.

5. Click **OK**.



This is an example of a description meta tag value shown in search results output.

Your search for "groups" returned 7 result(s).

Logical Groups of North American Birds

Introduction to a variety of bird groups, and how these groupings offer key differentiators for bird identification.
[B-identification/Bird-Groups.htm](#)

FINDABILITY

- **SEO** Description meta tags help to increase discoverability on the web. It is better to add this tag for topics rather than leaving it blank or relying on a search engine to auto-generate a description.
- **Content Management** In Flare Desktop, you might rely on the Used Meta Tags analysis report or the File List window pane to view a list of files that show the description tags used and their definitions.

Meta Tag	Meta Tag Set	Content	File	Title	Folder
description	Desc.flmeta	Introduction to topics for the xyz product.	Getting-Started.htm		Content\A-Introduction-Topics\
description	Desc.flmeta	Resources to explore regarding xyz product functionality.	More-Information.htm		Content\A-Introduction-Topics\
description	Desc.flmeta	Overview of new features for the latest xyz product release.	Whats-New.htm		Content\A-Introduction-Topics\
template		Flare.htm	Procedure1.htm		Content\C-Procedure-Topics\

Used Meta Tags dynamic report shows description meta tags.

	☐	Company.htm	Content\D-Reference\	630 b...	12/16/2021 11:5...			
	☐	FAQs.htm	Content\D-Reference\	743 b...	12/16/2021 11:5...			
	☐	Feature1.htm	Content\B-Feature-Topics\	821 b...	12/16/2021 11:5...			
	☐	Feature2.htm	Content\B-Feature-Topics\	821 b...	12/16/2021 11:5...			
	☐	Feature3.htm	Content\B-Feature-Topics\	821 b...	12/16/2021 11:5...			
	☐	Features.htm	Content\B-Feature-Topics\	820 b...	12/16/2021 11:5...			
	☐	Getting-Started.htm	Content\A-Introduction-Topics\	954 b...	4/22/2022 11:41...		Introduction to topics for the xyz product.	htm
	☐	Home.htm	Content\	6.35 KB	12/16/2021 11:5...			
	☐	More-Information.htm	Content\A-Introduction-Topics\	968 b...	4/22/2022 11:42...		Resources to explore regarding xyz product fun...	
	☐	Procedure1.htm	Content\C-Procedure-Topics\	892 b...	12/16/2021 11:5...			
	☐	Procedure2.htm	Content\C-Procedure-Topics\	837 b...	12/16/2021 11:5...			
	☐	Procedure3.htm	Content\C-Procedure-Topics\	823 b...	12/16/2021 11:5...			
	☐	Procedures.htm	Content\C-Procedure-Topics\	822 b...	12/16/2021 11:5...			
	☐	Tips.htm	Content\D-Reference\	743 b...	12/16/2021 11:5...			
	☐	Whats-New.htm	Content\A-Introduction-Topics\	965 b...	4/22/2022 11:43...		Overview of new features for the latest xyz pro...	

File List window pane indicating files that have values defined for the description meta tag.

Example—Linking Meta Tags to File Tags

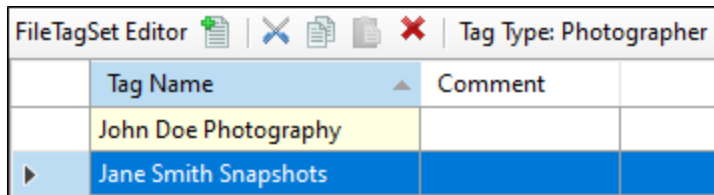
Being able to link meta tag sets to existing file tag set values supports legacy functionality. Authors who already use file tags can leverage their older files and use them with meta tag sets. The meta tags allow for a lot more capability.

☆ **EXAMPLE** Prior to meta tags in Flare Desktop, an author has created a file tag set to flag photo attribution on files that contain pictures. The project contains images from multiple professional photographers. The author works to integrate legacy file tags with meta tags.

LEVEL

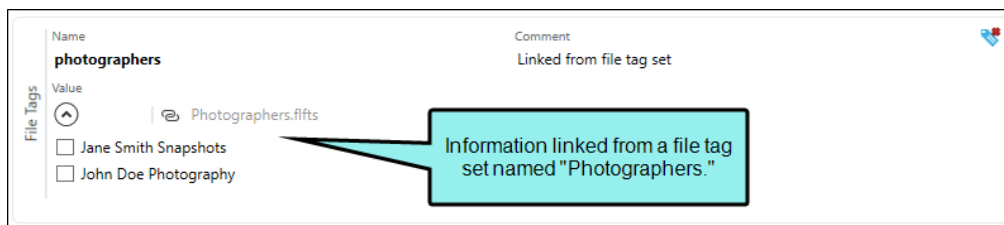
The author creates a meta tag set and adds a new file tag link within it. Then, the author assigns the applicable value in topics.

1. Identify the file tag set to use. This example assumes that a file tag set is already created.



Tag Name	Comment
John Doe Photography	
Jane Smith Snapshots	

2. In the Meta Tag Set Editor, from the **Add Meta Tag** drop-down, hover over **File Tags** and select the file tag set. This adds a meta tag linked to the file tag set.
3. For the new tag, complete the **Name** field (using the same name as the file tag set might be a good idea for consistency), and optionally add a **Comment**. The values are predefined from the link with the existing file tag set.



Name: **photographers**

Comment: Linked from file tag set

Value:

☐ Jane Smith Snapshots

☐ John Doe Photography

Information linked from a file tag set named "Photographers."



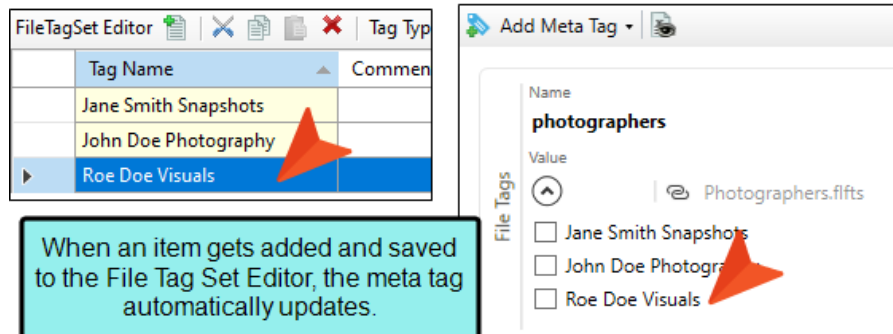
4. Click  to save your work.

The new meta tags still need to be associated with the topics. As long as the file tags exist and are associated with topics, reports can be run using file tags.

5. For each topic, open the Topic Properties dialog. In the **Meta Tags** tab, select the applicable value for photo attribution. (Select multiple values by selecting the check box for each applicable item.)
6. Click **OK**.



NOTE If the original file tags are edited (and the file is linked to meta tags), the changes automatically update to the meta tag set.

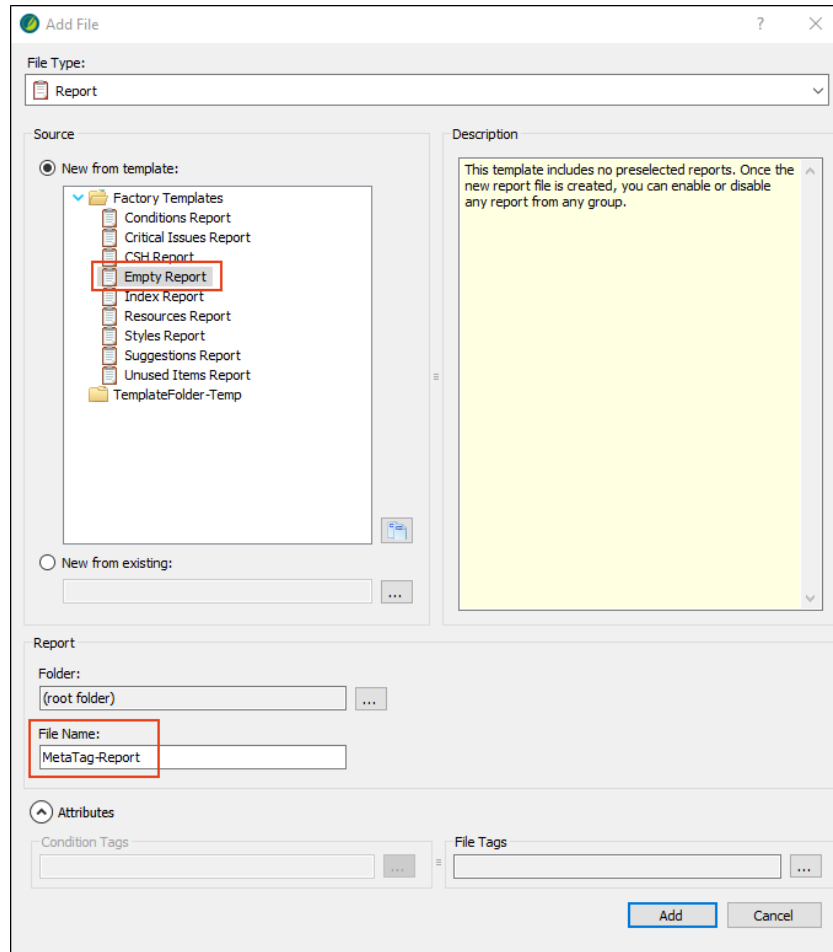


FINDABILITY

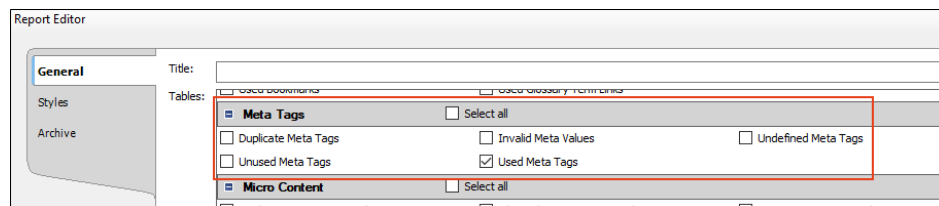
- **Content Management** Once the meta tags are associated with content, you might use the Analysis ribbon to analyze meta tags. Or, you can generate a report, as described below.
 1. From the Project Organizer, right-click the **Report** folder, and select **Add Report File**.



2. In the Add File dialog, select to add an **Empty Report**, give the report a **File Name**, and click **Add**.



3. In the Report Editor, scroll to the **Meta Tags** section, select items to report, and click **Generate**.





The report might look something like this. (It consists of the same information that would be seen in a report from Analysis ribbon, just formatted in a different way.)

Used Meta Tags	
Count: 67	
File: Content/Home.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description=""	A report can identify metadata gaps.
File: Content/A-About-Birds/About-Birds.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description="Overview of what birds are and where they originate."	
Meta Tag: status="complete"	
File: Content/A-About-Birds/Flight-Feathers.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description="Why feathers are important"	A report can reveal project progress (if a meta tag indicates status types).
Meta Tag: status="working"	
File: Content/B-Identification/Bird-Groups.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description="Introduction to a variety of bird groups, and how these groups are identified"	
Meta Tag: status="complete"	
File: Content/B-Identification/Identifying-Birds.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description="A table with characteristics and identification tips"	A report can display information about metadata, at-a-glance.
Meta Tag: status="complete"	
File: Content/B-Identification/Bird-Groups/Birds-of-prey.htm	
Meta Definition File: Generic.flmeta	
Meta Tag: description="Brief description about the birds of prey group."	
Meta Tag: photographers="John Doe Photography"	
Meta Tag: status="working"	

Example—Adding Meta Tags Using List Values

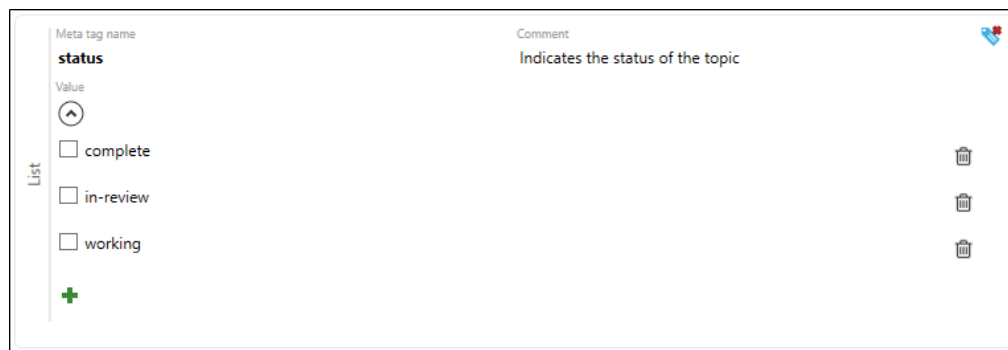
In the following example, the meta tags help to track the overall "status" of a project. This is useful for determining the progress of topics or identifying trouble spots. Meta tags that pinpoint the standing of topics can take on many different labels based on your needs (e.g., pending, approved, rejected, archived, or draft, review, rework, ready for translation, publish).

☆ **EXAMPLE** A manager wants to keep track of progress as his team develops topics for the next software release. The manager decides to create a list meta tag, which he populates with values: working, in-review, complete.

LEVEL

He creates this list at the meta tag set level. Then, in the topic he selects the applicable value for topic progress.

1. In the Meta Tag Set Editor, select **Add Meta Tag > List**.
2. For the new tag, complete the **Name** field, and optionally add a **Comment**.
3. In the **Value** field, enter a list item and value (e.g., working, in-review, complete).



The screenshot shows the Meta Tag Set Editor interface. At the top, there are two fields: "Meta tag name" with the value "status" and "Comment" with the value "Indicates the status of the topic". Below these fields is a section labeled "List" on the left. Inside this section, there is a "Value" field with a dropdown arrow. Below the dropdown, there are three list items: "complete", "in-review", and "working", each with a checkbox. At the bottom of the list, there is a green plus sign icon. To the right of each list item is a trash can icon.

Click  at the bottom of the area to add each status to the list.

4. Click  to save your work.
5. In the Topic Properties dialog, in the **Meta Tags** tab, find the meta tag name and select the value for the topic status.
6. Click **OK**.

☆ FINDABILITY

- **Content Management** In Flare Desktop, you can use the Used Meta Tags analysis report. Sort the **Meta Tag** column to view all the files containing the status meta tag. The Content column populates with the applicable status value for the topic. You can sort on that column as well by clicking the heading.

Meta Tag	Meta Tag Set	Content	File
status	Generic.flmeta	in-review	Famous-Birds.htm
status	Generic.flmeta	complete	Passerine-Birds.htm
status	Generic.flmeta	complete	About-Birds.htm
status	Generic.flmeta	complete	Road-Runner.htm
status	Generic.flmeta	working	Spy-Birds.htm
status	Generic.flmeta	complete	Wading-Birds.htm

Example—Adding Text Meta Tags With Variables

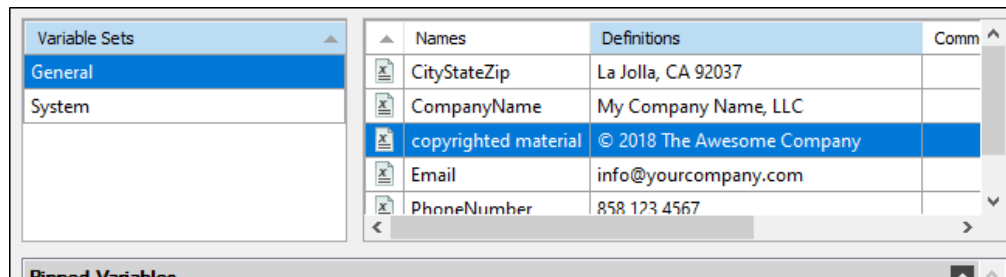
When you create a text meta tag you can insert variables into the value. If updates are made to the variable, it propagates to all applied instances of it.

☆ **EXAMPLE** A company wants its online technical documentation to include a copyright tag in the metadata. They simply want to add a layer of protection and record the fact that all the text, images, and other content are owned by the company.

LEVEL

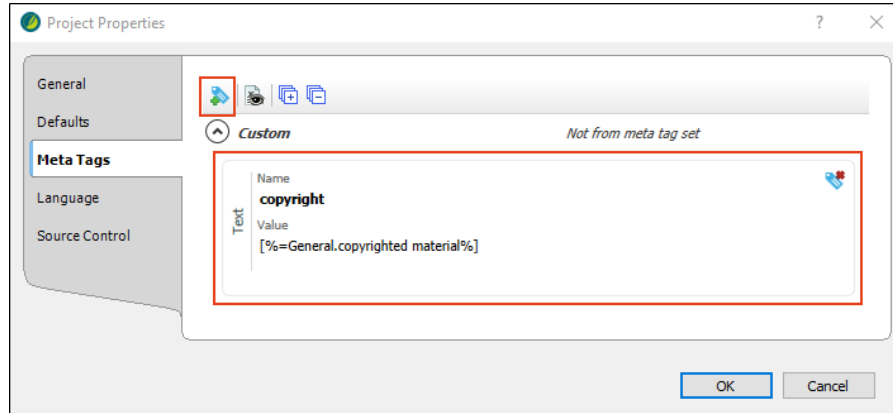
They create a text meta tag with a variable at the project level.

1. From the **Project** ribbon, select **Project Properties**.
2. In the Project Properties dialog, select the **Meta Tags** tab, and click .
3. In the **Name** field, enter `copyright`.
4. In the **Value** field, select  (**Insert Variable**). (This example assumes a variable is already defined.)
5. In the Variables dialog, from the **General** variable set, select a variable to link to the meta tag, and click **OK**.

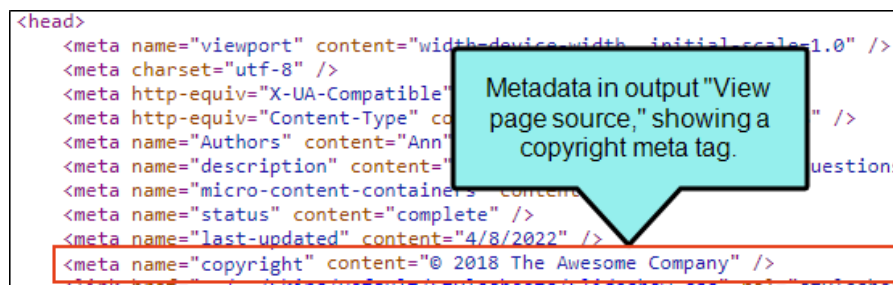




6. In Project Properties, click **OK**.



When metadata is set at the project level, the meta tags do not display in the source markup for topics (unless the value is overridden at the topic level), but they do show in output source pages.



FINDABILITY

- **Content Management** In Flare Desktop's dynamic reports (in the Analysis ribbon), you can open the Used Meta Tags or Used Variables window panes to see copyright metadata display in each, indicating that the metadata is applied at the project level.



NOTE You can also add system variables. A common use might be to stamp a date and time in the metadata for a web page.

Other Activities for Meta Tags

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

This chapter discusses the following:

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- Viewing Invalid Meta Values73
- Viewing and Renaming Used Meta Tags74
- Viewing Undefined Meta Tags76
- Viewing Unused Meta Tags79

I Viewing Duplicate Meta Tags

You can view a list of all meta tags that have been applied to files throughout your project and whose values are defined two or more times in the same file. However, the same meta tag name *is allowed* in different meta tag sets.

How to View Duplicate Meta Tags

1. Select **Analysis > More Reports > Duplicate Meta Tags**. The Duplicate Meta Tags window pane opens.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
4. You can quickly remove multiple meta tag occurrences in a single batch. Select the rows you want to affect, and click the "Delete" button.



NOTE You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

I Viewing Invalid Meta Values

You can view a list of all files containing meta tags that have invalid values. For example, an invalid meta tag might occur if you remove a meta tag's list item from the meta tag set file. In a case such as this, you can resolve the issue by adding the list item back to the meta tag set, or re-associating the files with a different value.

How to View Invalid Meta Values

1. Do one of the following, depending on the part of the user interface you are using:
 - **Ribbon Select Analysis > More Reports > Invalid Meta Values.**
 - **Summary Window Pane** Double-click the row that mentions invalid meta values.

The Invalid Meta Values window pane opens.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.



NOTE You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

I Viewing and Renaming Used Meta Tags

You can view a list of all meta tags that have been applied to files throughout your project. The list shows not only the meta tags, but each file where they have been used, and the values (i.e., content) of each. You can also quickly rename or remove multiple meta tag occurrences in a single batch.

How to View Used Meta Tags

1. In the **Analysis** ribbon, select **Used Items > Used Meta Tags**.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
 - **Meta Tag** Displays the name of the meta tag.
 - **Meta Tag Set** Displays the name of the meta tag set file (if any) where the meta tag was found.
 - **Content** Displays the value for the meta tag.
 - **File** Displays the name of the file.
 - **Title** Displays the properties title of the file (if any).
 - **Folder** Displays the folder where the file is found.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
4. You can click a column heading to reorganize the grid according to that value. For example, if you want to see the meta tag values grouped together, click the Content column heading.



NOTE You can open any file in the list to view or modify it in an editor. You can either double-click on the specific row, or right-click on the row and select **Open**.

How to Rename Meta Tag Occurrences

1. In the window pane, select all file tag occurrences that you want to rename. If you want to select all rows click . You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

 **NOTE** All meta tag occurrences that you select will be renamed to the same meta tag that you provide in the following steps.

2. In the local toolbar, click the **Rename** button.
3. In the **New meta tag name** field, enter a meta tag name that already exists in the meta tag set.
4. Click **OK**.
5. A message lets you know how many files were changed. Click **OK**. All of the selected meta tag occurrences are renamed.

 **NOTE** If you want to undo the conversions, you can use the Backups window pane (**View > Backups**).

I Viewing Undefined Meta Tags

You can view a list of all files with meta tags applied to them, but those meta tags have not been defined. This might occur, for example, if you have applied a meta tag to a file and then later change the name of the tag or meta tag set in the Text Editor.

How to View Undefined Meta Tags

1. Do one of the following, depending on the part of the user interface you are using:
 - **Ribbon Select Analysis > Undefined Items > Undefined Meta Tags.**
 - **Summary Window Pane** Double-click the row that mentions undefined meta tags.

The Undefined Meta Tags window pane opens.

2. To see more of the information in the window pane, drag the divider bar to make the pane wider.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.

How to Fix Undefined File Tags

There are a couple of basic ways to fix an undefined meta tag. First, you can rename the meta tag so that it matches what you have associated with the file. Otherwise, you can re-associate the meta tag with the file so that it uses an existing meta tag or meta tag set.

To Rename Meta Tags

1. In the window pane, select all file tag occurrences that you want to rename. If you want to select all rows click . You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.



NOTE All meta tag occurrences that you select will be renamed to the same meta tag that you provide in the following steps.

2. In the local toolbar, click the **Rename** button.
3. In the **New meta tag name** field, enter a meta tag name that already exists in the meta tag set.
4. Click **OK**.
5. A message lets you know how many files were changed. Click **OK**. All of the selected meta tag occurrences are renamed.



NOTE If you want to undo the conversions, you can use the Backups window pane (**View > Backups**).

To Re-associate Meta Tags

1. In the Content Explorer, right-click the file and select **Properties**.
2. Select the **Meta Tags** tab.
3. Select the appropriate meta tag set and meta tag.
4. Click **OK**.

What's Noteworthy?



NOTE Another way to associate a different meta tag to many places throughout a project is to use the Find and Replace in Files feature in Flare Desktop. For example, let's say that you originally associated values from a meta tag named "Authors" with a lot of files in your project. Later, you renamed the meta tag "Writers." If this results in undefined meta tags for some reason, you can perform a find and replace in your entire project. In the "Find" field, you can enter `<meta name="Authors">`, and in the "Replace with" field, you can enter `<meta name="Writers">`. Also, make sure you select the "Find in source code" option in the Find and Replace in Files window pane. After replacing this text throughout your project, that meta tag will no longer be considered "undefined" in Flare Desktop. See the Help system for more information.

I Viewing Unused Meta Tags

You can view a list of all meta tags that have been created in your project but have not yet been used in any files. By "unused," we mean that the meta tag was created but no values were set for it in any file.

You can quickly delete any of the meta tags that you do not plan to use.

How to View Unused Meta Tags

1. Select **Analysis > More Reports > Unused Items**.

The Unused Items window pane opens, which lets you view various unused elements in the project (such as bookmarks, condition tags, content files, CSH IDs, images, variables, styles, file tags, meta tags, and topics not linked).

2. Click the drop-down field at the top of the window pane and select **Unused Meta Tags**. The unused meta tags in the project are listed.
3. To see more of the information in the window pane, drag the divider bar to make the pane wider.
4. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items. You can also click **View All** in the local toolbar to see all results on a single page. Keep in mind that the more items you have in the project, the longer it will take to load this view.
5. If you want to remove any unused meta tags from the project being analyzed, select the meta tag in the list and click  in the local toolbar.

APPENDIX

PDFs

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

I Tutorials

Autonumbers Tutorial

Back-to-Top Button Tutorial

Context-Sensitive Help Tutorial

Custom Toolbar Tutorial

eLearning Tutorial—Basic

eLearning Tutorial—Advanced

Getting Started Tutorial

Image Tooltips Tutorial

Lists Tutorial

Meta Tags Tutorial

Micro Content Tutorial—Basic

Micro Content Tutorial—Advanced

Responsive Output Tutorial

Single-Sourcing Tutorial

Snippet Conditions Tutorial

Styles Tutorials

Tables Tutorial

Word Import Tutorial

Cheat Sheets

Context-Sensitive Help Cheat Sheet

Folders and Files Cheat Sheet

Learning & Development Cheat Sheet

Lists Cheat Sheet

Micro Content Cheat Sheet

Print-Based Output Cheat Sheet

Search Cheat Sheet

Shortcuts Cheat Sheet

Structure Bars Cheat Sheet

Styles Cheat Sheet

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

*Flare Online Integration
Guide*

Getting Started Guide

Global Project Linking Guide

HTML5 Guide

Images Guide

Import Guide

Indexing Guide

Key Features Guide

Lists 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