

Moving from FrameMaker to Flare

Best Practices

Moving from FrameMaker to Flare

Moving from Adobe® FrameMaker® to MadCap Flare™ is easy, although to get the best results you need to do some planning before you start. The first part of this document discusses suggestions and issues to make the result as clean as possible.

When using Flare, you may want to do some complex layout or other advanced tasks. The second part of this document describes how to do some of these.

In this document, we talk about plug-ins and other tools from other vendors to help you clean up your FrameMaker files. MadCap Software is not associated with the companies or individuals who make these tools. We do not provide support or other information about these tools.

You don't need to purchase any of these tools to clean up your Frame files; they can just make it easier and faster. Many of the listed tools run in a Shareware mode or are free.

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About Flare and FrameMaker

Flare is different than FrameMaker, not just because it is a different product, but because Flare “thinks” about content differently than Frame.

In FrameMaker, you use a book with files to define your content. The smallest chunk of info is typically the file, or chapter. You assemble a group of files into a book, which is your deliverable. You can use Flare the same way, in that you can open a topic and write a 50 page chapter 4, but the real power of Flare will be missed.

Best practice: Analyze the information in your Frame files before you start importing into Flare

In Flare, you don’t work initially with chapters; rather, you work with topics. Similar to Frame, you assemble the topics into the deliverable but you will have many more topics than you had chapters in FrameMaker.

Topics are the unit of content that you should be working with in Flare. Topics are usually 2 to 4 pages of text, including any graphics. Topics probably map to the headings (Heading 1, Heading2, and so on) in your FrameMaker files.

Not all the information in every heading section should be a topic, though. For example, the information in your heading level 4s may not be able to stand on their own – this information may need the context of the information in the heading level 3 above it to make sense to the reader.

There are no hard and fast rules about size of the chunks of information and how to break it up. In general, a topic should be able to stand on its own. This is where knowing the structure of your Frame files is going to help you a lot.

If you’re working with legacy files you didn’t write, it’s worth spending an afternoon going over the structure of the files to understand what you’re dealing with.

Before you start converting

The Flare import process requires less work overall if you prep your files before you start. Make sure you make a backup of all Frame files first. We've identified no issues and your FrameMaker files should be untouched, but it's always better to be safe.

Best practice: Cleanly formatted Frame files with no style overrides

The more your FrameMaker files consistently use defined styles, the more smoothly the import process will be for you.

Make sure you use paragraph, character, and table formats consistently and with no manual overrides. For example, if you hand bolded text throughout your book, but the bold isn't a character style, it may be worth your while to create a Bold character style and apply it to all instances of hand bolded text.

To easily find overrides in your FrameMaker files, you can use the free tool Hunt Overrides available at <http://www.freeframers.org/freeware/cud/>.

You can always use MadCap Analyzer to clean up your files when you get into Flare as well.

Best practice: Logically structured FrameMaker files

The more logically you structure the information in your Frame files, the easier the information will be to work with in Flare. For example, the information tagged Heading 1 should be all the same kind of information.

If you have:

H1: Opening Files

H3: Editing Files

H2: Saving Files

H4: Printing Files

H3: Archiving Files

These are probably all H1 level headings and should be moved to be at the same level. You can do this in FrameMaker or you can use an outlining FrameMaker tool called Enhance, available at <http://www.sandybrook.com> for about US \$100.00. If you have many files that need to be logically structured, Enhance is probably the way to go.

Best practice: Consistently use and apply paragraph, character, and table formats

Over time, it's easy for FrameMaker files to include many formats, some used and some not. It's also easy to have several formats that look identical and serve the same purpose. This can cause confusion after importing into Flare.

You should delete the unused formats in your Frame files. You can do this manually, or use tools like the following to help.

To delete	Use this tool	Available from	\$
Unused Character formats	Character Tools	www.siliconprairiesoftware.com	\$10.00
Unused Paragraph formats	Paragraph tools	www.siliconprairiesoftware.com	\$10.00
Unused Table formats	Table tools	www.siliconprairiesoftware.com	\$10.00

Make sure you understand how your files were designed. It's possible that you or someone else tagged different kinds of information with tags that look identical. You may not want to undo this.

If you have many identical formats in your Frame files and they serve no purpose, you should consolidate these.

To help you identify identical tags, it might be useful to list all tag settings. Table Tools, Character Tools and Paragraph Tools, listed above, will create these lists.

To help you after you identify the formats you want to change, go to www.frameexpert.com/plugins/findchangespecial/index.htm and get FindChangeSpecial. It's about US \$30. You don't need this tool because you can find and change format names in FrameMaker, but this tool makes the process faster.

After import, you may still need to clean up the formats in Flare. If so, it's probably worth purchasing MadCap Analyzer. It can show you unused styles, identical styles and other issues in your style sheets. You can delete, rename, and so on right in Analyzer.

Best practice: All cross references and referenced files need targets

To import your files into Flare, Flare (and FrameMaker) should be able to find all the files used. In FrameMaker, this is pretty easy – generate/update your book so it finds all the files the book. Even if you're only going to import one file from a book, this lets FrameMaker make sure it knows where everything is and how to find it.

If FrameMaker reports it can't find files or cross references, sort this out before you start your Flare import.

Best practice: Update the standard TOCs

If you are importing a book file that has a book-level TOC, the TOC is used to create a Flare TOC. This can save you a lot of time and effort in recreating your FrameMaker TOC. (However, see the next topic for a special case.)

Before you start the Flare import, make sure the FrameMaker book level TOC includes the headings you want in the eventual Flare outline. After you import into Flare, you can add topics to the outline but making sure the FrameMaker TOC is correct saves you work after the import.

If you used cross references in Frame to imitate a chapter-level TOC, these come through as standard cross references.

Best practice: Importing Frame TOC Files to get properly formatted Flare TOCs

When you import your Frame TOC, you might get a flat Flare TOC in that you may see no books or nested files. (From this point on in this section I'm calling all MadCap TOCs Outlines).

If your resulting Outline has all topics at the same level, this is a Frame issue. Flare imports and organizes the Outline based on the indent in your Frame TOC. So, if your Frame TOC looks like this, with no indents:

Creating Reports	Heading 1
Printing Reports	Heading 2
Number of Reports	Heading 3
Saving Reports	Heading 2
Working with Objects	Heading 1

Your Outline in Flare will not include nested headings in the Outline. Everything will be at the same level. You won't have any books or other positioning.

So how do you make your topics nest correctly in the resulting Outline? Make sure your headings are indented, according to level.

For example:

Creating Reports	Heading 1
Printing Reports	Heading 2
Number of Reports	Heading 3
Saving Reports	Heading 2

Working with Objects

Heading 1

To find out how to format a TOC in Frame, See the FrameMaker documentation.

As you import

All your file prep is going to pay off in the import process. This section assumes you've followed the best practices listed above. You have clean FrameMaker files that can locate all linked files. Your TOC has headings indented in the structure you want the topics nested in the resulting Outline.

When your files are the way you want them, you're ready to start importing.

Best practice: Overall Workflow

There are several ways you can import your Frame files into Flare the first time. We recommend the following workflow for the first time you import:



This workflow is best if this is the first time you're importing Frame files into Flare. Spend the time to make the CSS style sheet look the way you want it to look.

After you have a customized CSS, go back to your Import rules and start over. Create a new project, specify the Frame files to import, select the customized style sheet and map the styles the way you want them to come thru.

This sounds like a lot more work than it really is. The time you spend up front, defining the styles and making it all look the way you want is more than made up for in the future. In essence, you're creating templates that you (and others) can reuse in the future. See the next section for more about importing.

Best practice: The Import process creates “rules” that can be reused later

When you import and convert files, you are creating “rules” for importing and converting the selected files. What's not obvious is that these rules are saved and can be reused if you want to import more files in the future. You can also copy these Import rule sets and make small modifications to reuse them with slightly different files.

You can remove selected files from the Source Files list and add others. The rules you originally created are used to import and convert the newly selected files.

It pays off in saved time down the line because you make sure the Import is as clean as possible. The rest of the Best Practices in this section will help you do that.

Best practice: Pay attention and be patient

If you start the Import, specify a FrameMaker file, and click Finish, you're just going to hate the results.

The import process requires that you make decisions about what you want, based on what you have. Because the structure of the information in FrameMaker files can vary wildly, pay attention to the decisions you're being asked to make and take the time to make them.

Best practice: Try it several ways

Because we offer you many options on import, you may be uncertain what you need to select and why. At the end of the import process, we show you a preview of what your files look like. Take the time to scroll through the results and look at what happened.

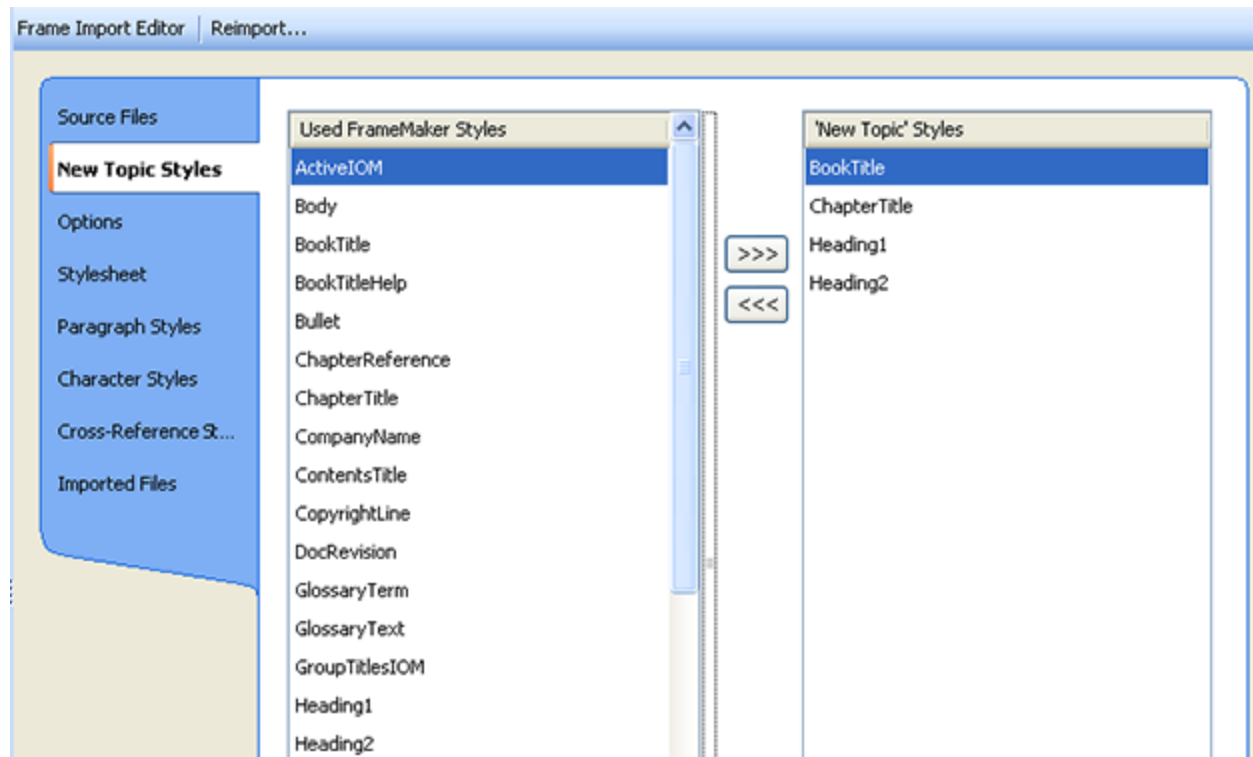
If what you see is not what you wanted, click Cancel and try other options. Rinse and repeat until what you see in the preview looks like what you want. We provide the preview so you can make an informed decision about your content before you commit to it in Flare. Use that option and don't be afraid to cancel many times, if needed, to get what you want.

Best practice: Slice your information into reasonable chunks

The New Topics Styles tab is one of the most important places to stop and think when you are importing FrameMaker files into Flare.

What you're doing is telling Flare that you want your FrameMaker files chopped into topics, based on the paragraph formats you move to the right side of the screen. This is where the logically structured documents that you prepped, using the guidelines detailed earlier, will pay off.

In the example below, Flare will make topics out of sections that start with BookTitle, ChapterTitle, Heading1 and Heading2. No other formats will be used to create topics.



At the end of the Import process, carefully review the topics to see if the formats you selected are the information chunks you want. If they are too large or too small, cancel and select other formats to see if you like those better.

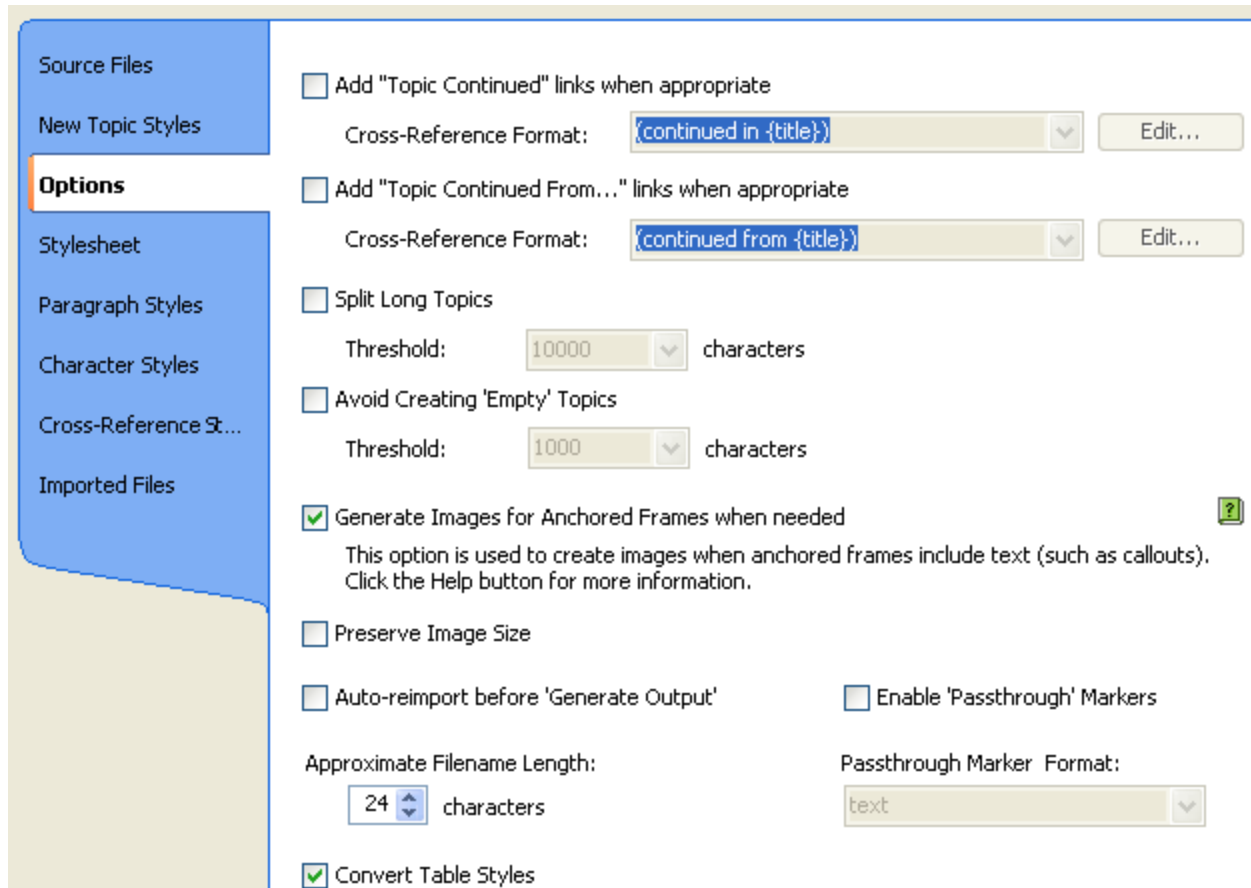
Best practice: Importing graphics

Technical manuals typically use many graphics. It's important these come through the conversion process as clean as possible. You specify these settings on the Options tab.

When you import, you have a few options for graphics. What you select depends on what you want to do and how your Frame files are set up. The result also depends on settings in Distiller. Distiller settings are covered in Distiller settings at the end of this section.

- If your graphics have callouts (arrows, text, or other elements) that you created in FrameMaker, or if you have anchored frames with 2 or more graphics in the frame, select Generate Images for Anchored Frames when needed. This creates a flattened graphic with the callouts as part of the graphic or the multiple images as one graphic.
- If your graphics don't have callouts or all anchored frames have only one image and no callouts, you can clear the Generate Images for Anchored Frames when needed check box. If you are uncertain about the graphics in your Frame files, the best practice is to select the check box, just in case.
- To get the best resolution in the graphics after import, clear the Preserve Image Size check box. Your graphics import into Flare at the actual size of the graphic, which

may mean you must manually resize them in Flare. But this will give you the cleanest looking graphic because it wasn't reduced in size in the import process.

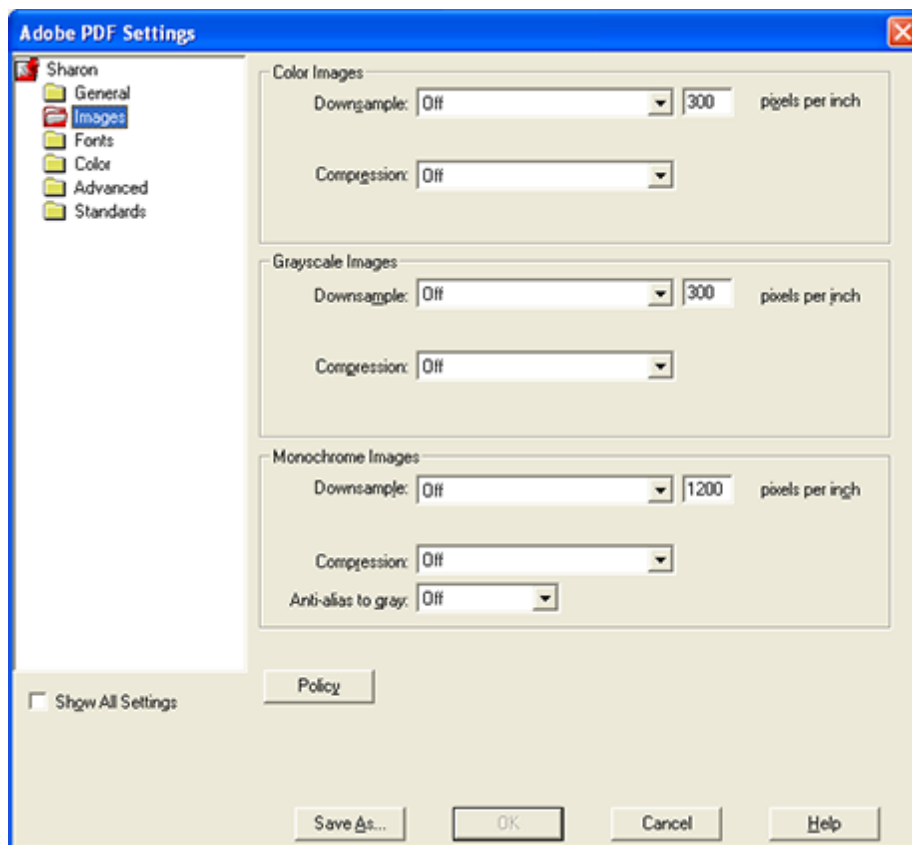


DISTILLER SETTINGS

Selecting the right import options in Flare is half the process in getting good-looking graphics. The other half is selecting the correct Distiller options.

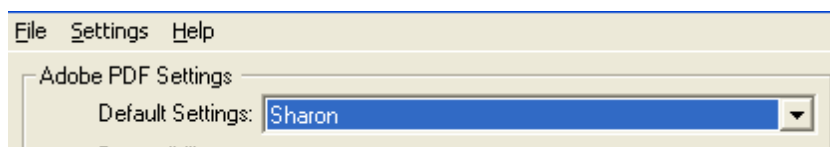
Why the correct Distiller options? Because we use Distiller to convert graphics from Frame to Flare. This lets us get the best quality graphics when you import into Flare. So it's important to get the settings right in Distiller before you start the import process.

The screen capture below shows Distiller 8 but the same settings can be found in other versions of Distiller.



Find the Images settings and set all Downsampling to Off or None. This prevents the Distiller from reducing the number of pixels in your graphics, making the resulting graphic look much cleaner.

When you're done, save the Distiller settings with a named job options. When you return to the Distiller interface, make sure you select the job option you just created.



When you close Distiller, it automatically uses the settings last selected when it was closed. So make sure you select the joboption you created before you close it.

TEST, TEST, TEST

Like so many options when you import, review the graphics in the Preview before you commit to the Import. Make sure the graphics look the way you want. If not, cancel and change options. Also understand that some clean up may be required so factor that into your time estimates.

Best practice: Preserve FrameMaker styles

If you have a robustly styled FrameMaker file that you like, and this is your first FrameMaker import, you probably want to Preserve FrameMaker styles on import.

This serves 2 functions: It makes your Flare documents look very similar to your FrameMaker documents and creates a template that you can easily reuse in future projects. While it may be some work up front, it results in less work down the line - always a good thing.

A note here: if you select this import option, you can get many “child” formats in your eventual style sheet. The names look like H1.Heading1 or H2.Heading2, where the part after the period comes from the style names in your FrameMaker files. These formats inherit some or all of their formatting from the parent (H1, H2, and so on) CSS style.

For more information in child/parent relationships and inheritance, look up Object Oriented Programming on Wikipedia. After you get thru the definitions of child/parent relationships and inheritance, you can ignore the rest of the article.

While we are not using object-oriented programming in Flare, child/parent relationships and inheritance are concepts that will help you in Flare and styles.

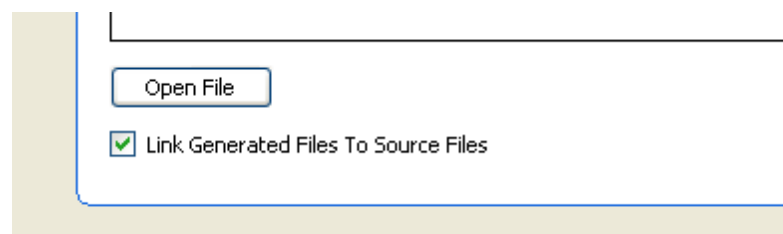
Best Practice: Selecting Frame files to import

When you import, you can select one of more fm files and/or an entire book. Which you select is going to be determined by what you’re doing.

AUTHORING IN FRAME, FLARE FOR HELP OUTPUT

If you are authoring in Frame and you’re really happy to continue doing that, you may be using Flare to create online outputs. In that case, you set up your Flare project select your Frame files to import and you should be done. But selecting the right files is going to make a difference.

If you want to continue authoring in Frame, make sure you select the Link Generated files to Source Files option on the Source files tab in the Import Editor.



This tells Flare to go look at the dates of the selected files and see if they have changed since the last import before you build an output.

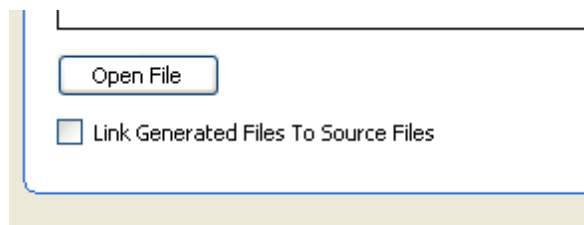
However, if you select a Frame book file, you may not see the updated content you know you added when you build the target. So what happened? The date on the Frame book file didn't change, even though the dates for the files in the book did change.

The best practice here is to select the files in the book, not the actual book itself. That makes Flare look at the dates for each file in the book and see if they changed since the last import before you build a target. If the date changed, Flare will automatically re-import the changed Frame file and then build the target.

IMPORTING FRAME FILES, AUTHORIZING IN FLARE

If you are importing Frame files into Flare and plan on staying in the Flare world when you're done, you can select the Frame book file. You are not making changes in the Frame files and then building targets in Flare, so Flare doesn't need to worry about file date changes.

If this is your workflow, make sure you clear the Link Generated files to Source Files option when you create the import rules.



Best Practice: Getting all the formats you want from your FrameMaker files

If you have Frame files with many paragraph/character/table formats and you want to import many or all of them, there are a few things to know.

When Flare shows you the Frame formats to map to Flare styles in the Import wizard, you're only seeing the formats that are actually used in the selected Frame files. If your Frame files include a lot more formats but you don't use them in the selected files, you can't map them nor do they get added to your style sheet.

So what to do? Pretty simple. In a Frame file, just add text to the end of the file and tag it with the formats you want to import but are not actually using. Add a few tables, if needed, and apply the table formats to them. You can always delete these after the import.

Best practice: How to exclude text from certain FrameMaker paragraph formats in Flare

In general, if the text is in FrameMaker, it's importing into Flare. That said, there are ways to manage text you don't want to appear in Flare outputs.

Why would you want to do this? For example, if you have a paragraph format called ChapNum that autonumbers your chapters and you are using Flare for online help. It doesn't make sense for that chapter number text to appear in the help system.

This is easy to do. In your FrameMaker files, create a condition called PrintOnly, for example. Mark the ChapNum paragraphs with the PrintOnly condition.

Now, before you import into Flare, at the book level, Exclude the PrintOnly condition. Generate and update your book/TOC/Index and you're good to go.

The text and the condition will come thru into Flare, but it's a simple matter to hide that condition when you create your targets. And you get online help files without Chapter numbers!

Best practice: Define your Flare styles if you aren't using an existing CSS style sheet

If you opted to preserve Frame styles, edit the styles to look as you want them before you finish the import. Click the Conversion Styles button and start changing the formats.

You don't have to make the changes to the formats here – you can always do it after you import using the Style Sheet Editor, but it will seem easier to do it now. Your content will come through looking more like you expect.

You can also map cross references and create new cross reference formats. See "Best Practice: Mapping and creating cross reference formats" on page 20 for details.

Best Practice: Creating auto-numbering styles on import

When you're importing, you can specify how you want bullets and numbering to look in Flare. If you are a strong FrameMaker user, you probably don't want to use the Numbering and Lists feature in Flare, as that doesn't give you quite enough control over the style of the bullet or autonumber. You can customize these when you import.

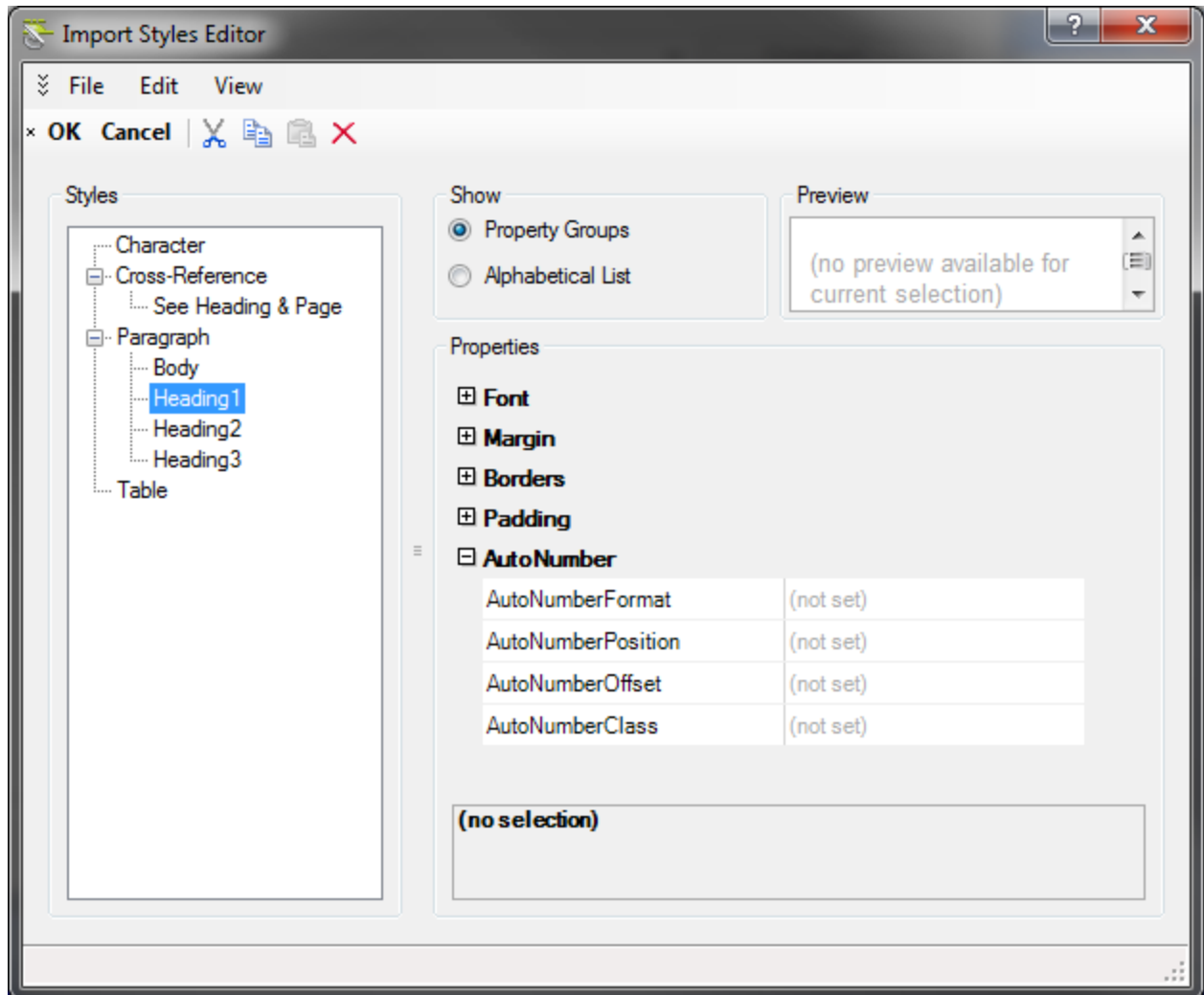
In the Import Styles Editor, expand Paragraph and click the name of the format you want to add bullets or numbering to. Use the table below for the formats.

Tip: To get the exact bullet you want, use Character Map to find the font and character you want. Paste it in the Autonumber Format field and use the {family} command to

specify the font you want for the bullet. Combine other formats in that field to change the color and so on. Use the other fields to specify where you want the number or bullet.

For example: {family Times New Roman} {/family Times New Roman}

The bullet character is Alt+0183.



AUTO-NUMBERING FORMATS

{n}	Retains the current counter value and shows it.
{n=1}	Resets the counter value to 1 and shows it. You can replace the number 1 with any other number that you want to use.
{=0}	Resets the counter value to 0 but does not show it. You can replace the number 0 with any other number that you want to use.
{n+}	Increments the counter value and shows it.
{}	Retains the current value and does not show it.
{secnum}	Shows the current section number. You can use this command if you are creating Word, XPS, PDF, or XHTML output. This command does not apply to FrameMaker output.
{chapnum}	Shows the current chapter number.
{volnum}	Shows the current volume number.
{r}	Shows the counter as a lowercase Roman numeral.
{R}	Shows the counter as an uppercase Roman numeral.
{a}	Shows the counter as a lowercase alpha letter.
{A}	Shows the counter as an uppercase alpha letter.
{Sn}	Use over the course of an entire section. This specific command retains the current counter value and shows it.
{Cn}	Use over the course of an entire chapter. This specific command retains the current counter value and shows it.
{Gn}	Use globally in your content. This specific command retains the current counter value and shows it.
H:	Specifies a numbering series labeled H. However, you can use any letter of the alphabet for a series label, and you can use several different series labels throughout your content.
SH:	Specifies a section-wide numbering series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H).
CH:	Specifies a chapter-wide numbering series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H).
GH:	Specifies a global numbering series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H).

FILE COMMANDS

{ext}	Shows the file extension.
{file}	Shows the file name, including the extension.
{filename}	Shows the file name, without the extension.
{path}	Shows the path of the file.
{url}	Shows the path of the file, URL syntax.

FORMAT COMMANDS

{b}	Starts bold text.
{/b}	Ends bold text.
{bg red}	Starts new background color. You can replace "red" with another color.
{/bg}	Ends the background color.
{color red}	Starts new text color. You can replace "red" with another color.
{/color}	Ends the text color.
{default}	Resets all font changes.
{family Courier New}	Starts a new font family. You can replace "Courier New" with another exact font family name.
{/family}	Ends font family.
{i}	Starts italic text.
{/i}	Ends italic text.
{size 12pt}	Starts font size. You can replace "12pt" with another font size.
{/size}	Ends font size.
{sub}	Starts subscript text.
{/sub}	Ends subscript text.
{sup}	Starts superscript text.
{/sup}	Ends superscript text.
{u}	Starts underline text.
{/u}	Ends underline text.

PAGE COMMANDS

{page}	Shows the page number.
{pagecount}	Shows the page count.

TEXT COMMANDS

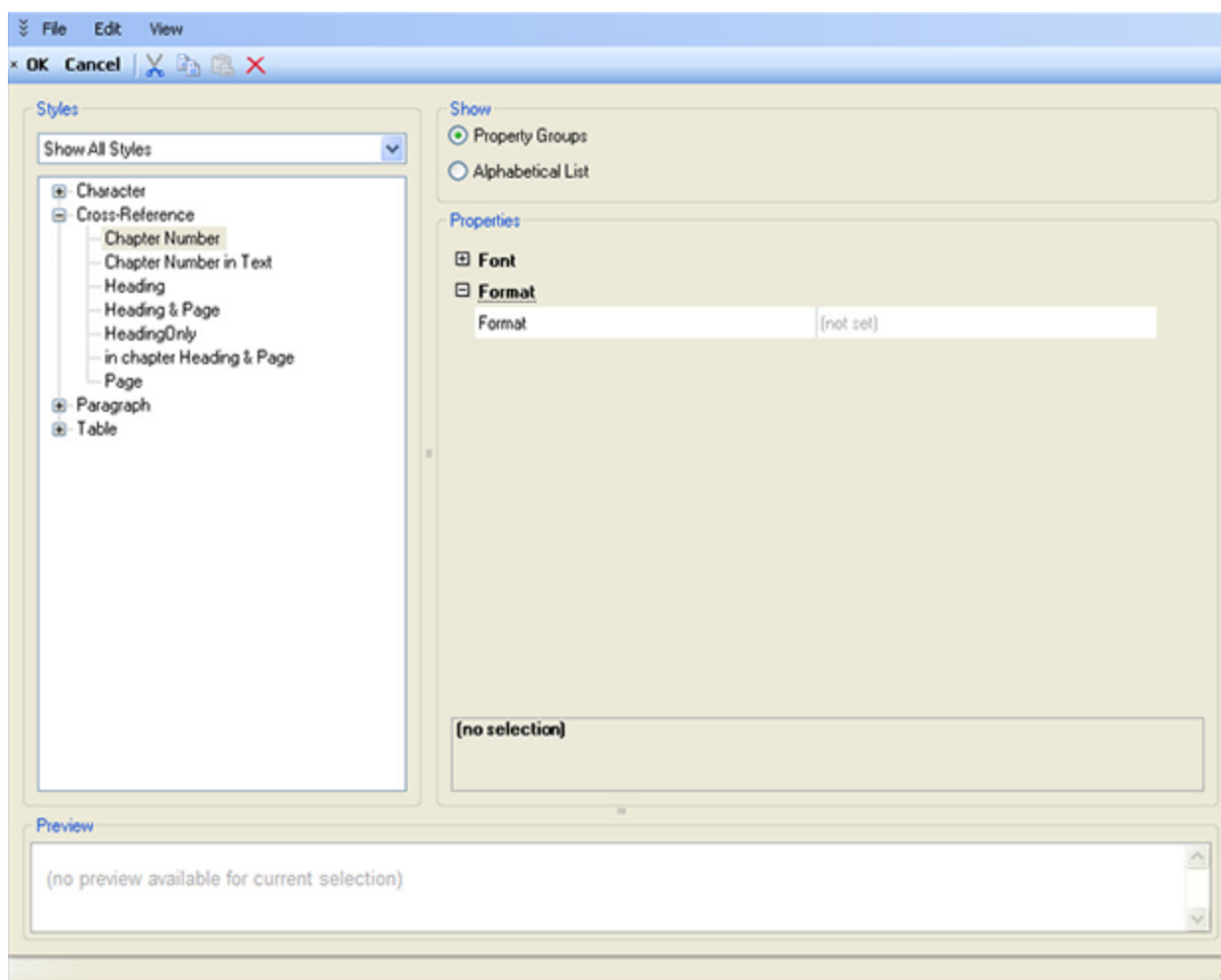
{title}	Shows the title of the document (from the Properties dialog).
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Best Practice: Mapping and creating cross reference formats

Most technical material has lots of cross references. This is a great practice because it helps the reader know where related information is in the manual. Flare has a robust cross reference feature set.

You have 2 ways of managing cross references.

1. Using the standard mapping during import. This is in the Import Wizard, on the Cross References tab. This setting overrides any other settings you may use. The downside to using this area is that you have little control over the exact cross reference structure. It's best if your cross references are Heading and page style references. You can always change them later.
2. Using the Preserve Frame Styles Conversion settings. In the Import Styles Editor, you can change the cross reference formats in your Frame files to map to exactly what you want in Flare. This is a better method if you have a lot of 'unique' cross reference formats, such as Step # or other references.



When you expand Cross Reference, you see the cross reference formats in your FrameMaker document(s). You can specify how these look when they come thru the conversion.

The following table will help you understand how and what you are converting.

Command	Description	Similar to FrameMaker's format
{b}	Start bold text	Managed in Character formats
{/b}	End bold text	Managed in Character formats
{bg}	Start new background color	None
{/bg}	End background color	None
{color}	Start new text color	Managed in Character formats
{/color}	End text color	Managed in Character formats
{default}	Reset all font changes	[default]
{ext}	File extension	None
{family}	Start new font family	None
{/family}	End font family	None
{file}	File name, including extension	[fullfilename]
{filename}	File name, without extension	[filename]
{h1}	Text of first heading 1 paragraph in topic	None, although the running header/footer system variable comes close
{h2}	Text of first heading 2 paragraph in topic	None, although the running header/footer system variable comes close
{h3}	Text of first heading 3 paragraph in topic	None, although the running header/footer system variable comes close
{h4}	Text of first heading 4 paragraph in topic	None, although the running header/footer system variable comes close
{h5}	Text of first heading 5 paragraph in topic	None, although the running header/footer system variable comes close
{h6}	Text of first heading 6 paragraph in topic	None, although the running header/footer system variable comes close
{I}	Start italic text	Managed in Character formats
{/i}	End italic text	Managed in Character formats
{page}	Page number	[pagenumonly]
{pagecount}	Page count	
{pageref}	Context-sensitive page reference Automatically adjusts from a page	None

Command	Description	Similar to FrameMaker's format
	number to “above”, “below”, “next”, or “previous”.	
{para}	Text of bookmarked paragraph. The bookmark is automatically added to the heading when you insert the cross reference.	[paratext]
{paranum}	The auto-number text of bookmarked paragraph The bookmark is automatically added to the heading when you insert the cross reference.	[paranum]
{paranumonly}	The auto-number only of bookmarked paragraph The bookmark is automatically added to the heading when you insert the cross reference.	[paranumonly]
{paratext}	Text of bookmarked paragraph The bookmark is automatically added to the heading when you insert the cross reference.	[paratext]
{paraxml}	Text and markup of bookmarked paragraph The bookmark is automatically added to the heading when you insert the cross reference.	None
{path}	File path	None
{size}	Start new font size	Managed in Character formats
{/size}	End font size	Managed in Character formats
{sub}	Start subscript text	Managed in Character formats
{/sub}	End subscript text	Managed in Character formats
{sup}	Start superscript text	Managed in Character formats
{/sup}	End superscript text	Managed in Character formats
{title}	Title of document	None
{u}	Start underlined text	Managed in Character formats
{/u}	End underlined text	Managed in Character formats
{url}	File path, URL syntax	None, but HTML marker is close

Remember when you import cross references, they show the page number from Frame. Until you put the topics together into an Outline and create a target, the topics know nothing about pages and page numbering, except within a single topic.

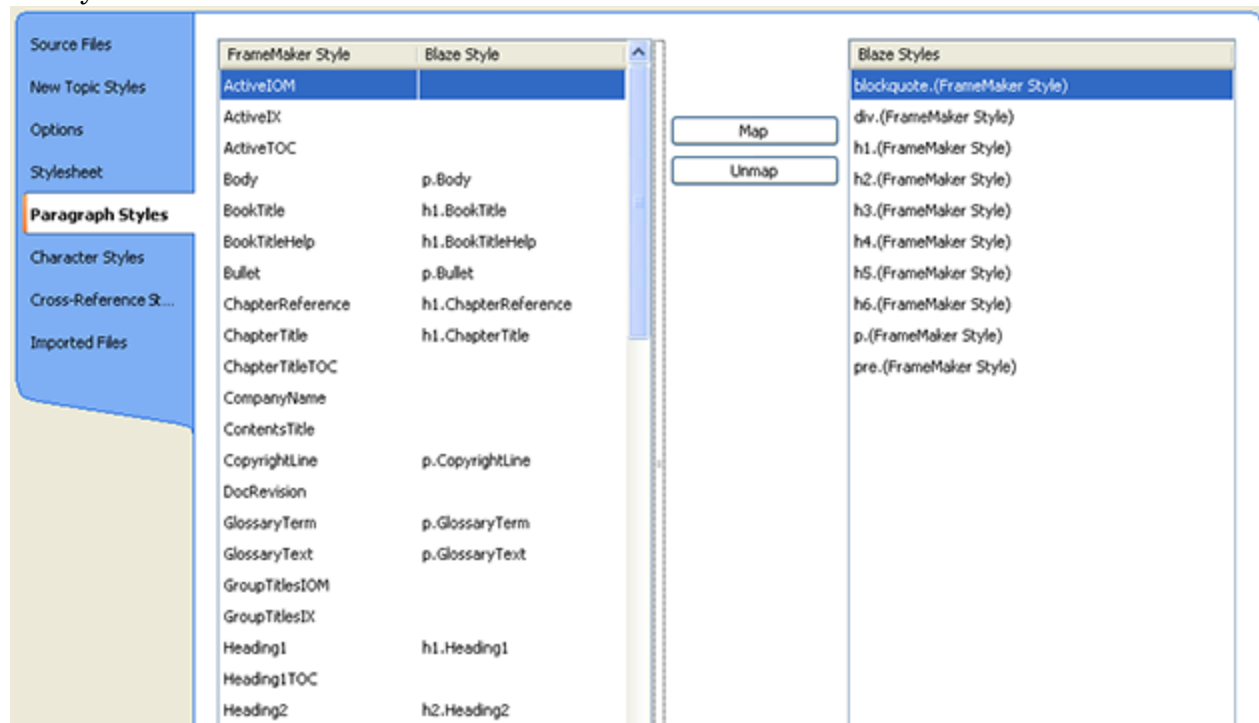
BEST PRACTICE: MAP ALL YOUR FRAMEMAKER STYLES TO THE STYLES IN YOUR CSS STYLE SHEET

When you reach the Import tabs for mapping your existing Frame styles to Flare styles, make sure you map all of them. You can map Paragraph styles, Character styles, and cross-reference styles.

Unmapped text styles (paragraph and character) come through as `p.whateverthestylewas` (paragraph) or `span.whateverthestylewas` (character). This may result in lots of formats you didn't actually want in the style sheet and can take a lot to clean up. Better to control the mapping upfront and reduce the clean up afterwards.

Cross reference formats should also be mapped. If you don't, you could wind up with lots of `xref.whateverthenamewas`, which is probably not what you wanted and may also result in a lot of clean up.

Remember, because you can preview what the import looks like before you commit, make sure you review items like cross-references.



Recreating and cleaning up after you import

After you clean up your source files and import into Flare, you will need to clean up or recreate certain things.

Best practice: Set up your master pages

Master pages from FrameMaker don't come through into Flare. You need to recreate them as Page Layouts. The good news is that Page Layouts are more flexible than FrameMaker Master pages. For example, Frame won't easily allow different sized pages in the same file.

Flare lets you have many pages defined in Page Layouts and they can be different sizes. This allows you to have a 8"x11" Page Layout that includes a 11"x14" page, for example, to allow for the fold out schematic you need in the middle of a chapter.

You can also have multiple sets of Page Layouts, something FrameMaker doesn't allow. This lets you define one set of Page Layouts for the 8"x11" PDF book you put on your website for customers to download. You can also define 7"x9" Page Layouts for the printed book you will send to the printer that needs to fit in the product box.

You will associate the Page Layout when you define your Target. See the Flare online Help for more details.

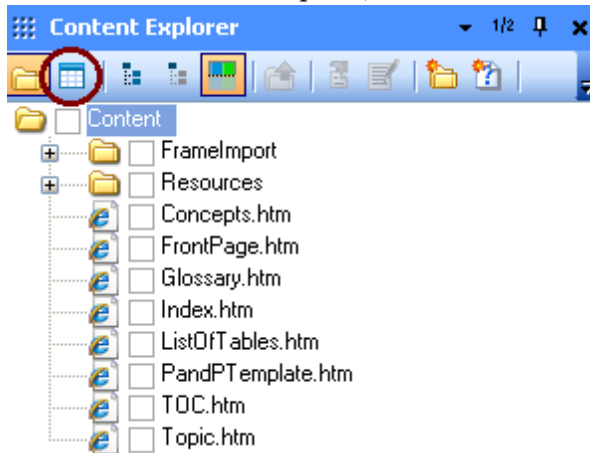
REFERENCE PAGES

There are no equivalents to Reference pages in Flare. The formatting and other tasks you are used to performing are done either in the Style Sheet Editor or in the Page Layouts or both. See the Flare online Help for specific details about what you want to do.

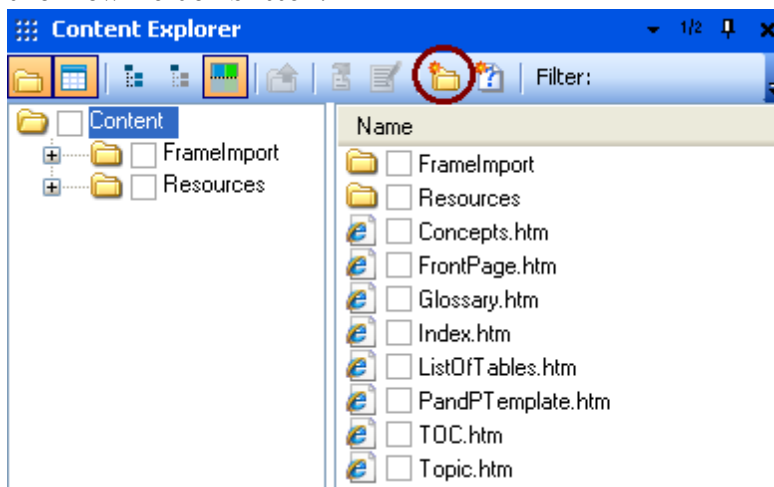
Best practice: Organize your files, such as creating a graphics folder

After you import, any graphics in your FrameMaker files are put in the same folder as your converted FrameMaker files. This looks messy and probably isn't what you wanted. You can easily fix this.

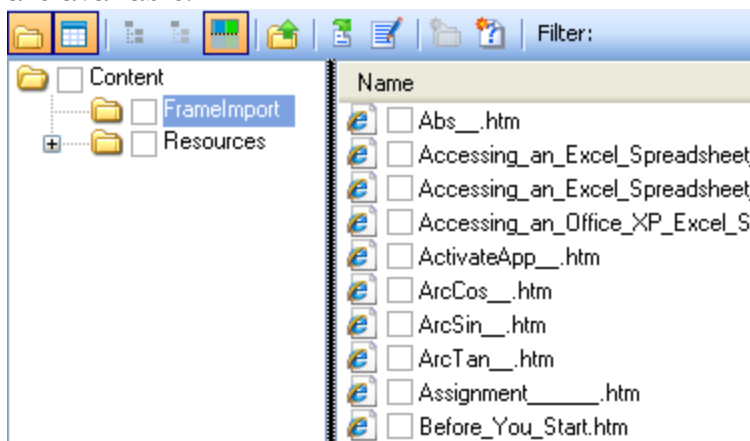
1. In the Content View pane, click the Show Files button.



2. A two pane view opens. You can expand your folders or create a new folder by clicking the New Folder button.



3. On the right side, select one or more files you want to move. Drag them to the folder on the left you want them to move to. All the standard Windows multi-select options are available.



4. You are prompted to update links when the files are moved. Make sure you click Update so that Flare knows where these files have been moved to and how to update all references to the files in the content.

Best practice: Move around and resize your graphics

Your graphics came through but, as with any conversion, there will be some tweaking to get them placed exactly where you want them, especially if your graphics were in the left margins in FrameMaker.

There are no anchored frames in Flare. To select a graphic, right-click and click Select. Now you can right-click and click Properties to format and position the graphic the way you want it. See the Flare online Help for specific details about what you want to do.

Reuse what you did before

After you get through one import and you like the way your content looks, you can reuse what you did in several useful ways.

Best practice: Reuse your style sheet in the next project

The next time you need to import another FrameMaker project, all the time and work you put into perfecting your style sheet will pay off.

During your next import process, browse and select the style sheet you already like because you created it and modified it in the previous import. This reduces all the effort in defining and mapping styles. All you have to do is map styles and account for any new FrameMaker formats not mapped or created in your style sheet.

Best practice: Use Global project linking to link projects and content

In Flare, all the project parts you created, such as style sheets, variables, Page Layouts, and so on, can be saved into a project. This project can be “imported” into another project using Global projects.

For example, create a project that has all the standards you want; such as style sheets, variables, conditional text, Page Layouts, Master pages, and so on. Save this project to a network location that everyone can get to.

When you open a Flare project, you can “link” the project to the parent project by creating a Flare Parent import file. When you define the import, select the parts of the parent project you want to use in the child project. You can use some or all of the items you defined in the parent.

These items can be linked so that before the target is build, the Parent project is checked for any updates. The child project is automatically updated and then the target is built.

Now what?

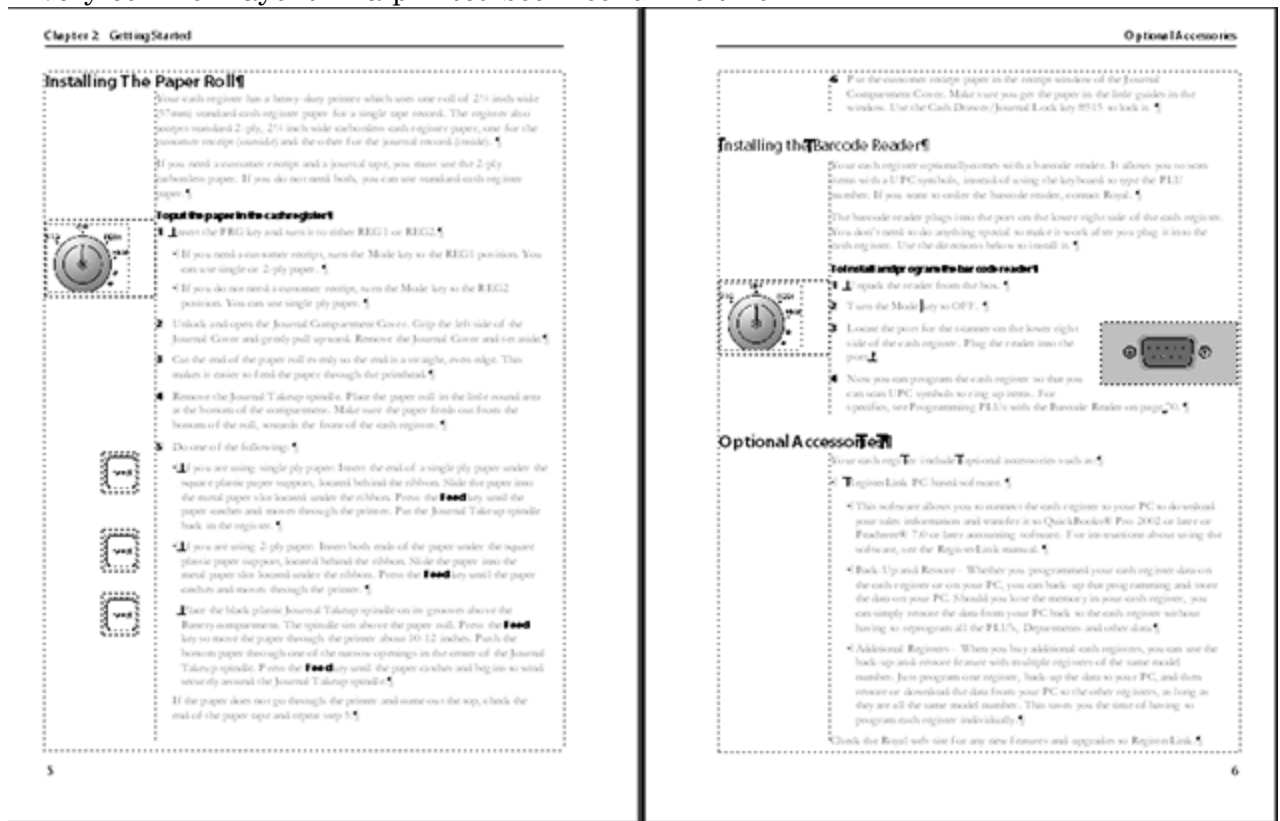
Now you can start:

- Adding more topics
- Working with conditional text
- Defining targets
- Creating snippets
- Creating outlines

And so much more. See the next sections or Flare online Help for specific details about what you want to do. And don't forget to ask questions of other Flare experts in the Support Forums, available at <http://forums.madcapsoftware.com>.

Creating and using complex layouts

A very common layout in a printed book looks like this:



Let's look at the pieces and see how to do this in Flare.

Best practice: Creating room for side-heads

A common layout for technical manuals looks like the graphic on the right. The right side of the page is where the body text goes and the left side includes note, cautions and warnings. Headings span both "columns" or side-heads. This is an effective layout for many reasons: it has an open feel, information is easy to scan, and the page looks balanced. This section and the next explain how to replicate this layout in Flare.

In Flare, you add some styles to your style sheet and then use text boxes. The text boxes "follow" the body paragraph. You can also put graphics in the text box to show, for example, icons or other useful visual reminders. You can also put headings in the left area and have them wrap and stay next to the text on the right.



Set up the style sheet for the styles that you want to appear to the right. This may be many styles, so if you are using “inherited” styles, this will help. This example will show only very simple styles but you can adapt this method to your styles.

1. In Flare, open your style sheet in the Style Sheet Editor. Change or add the following tags:

P tag Set the Margin-Left to 2.5" so the main body of the topic moves over 2.5" from the left side of the page.

p.Note tag Create a new class for the text in the left “margin”. Set the Margin to 0.

Don't forget to use Style Sheet Mediums to allow for different page sizes, if you have different sizes in different Page Layouts. If you have different sized pages, you will also want to change the space from the left for the body tags. For more details about creating and using mediums, see the Flare online Help.

2. Save the styles. Continue changing all the right styles that you want. You probably won't change the headings.

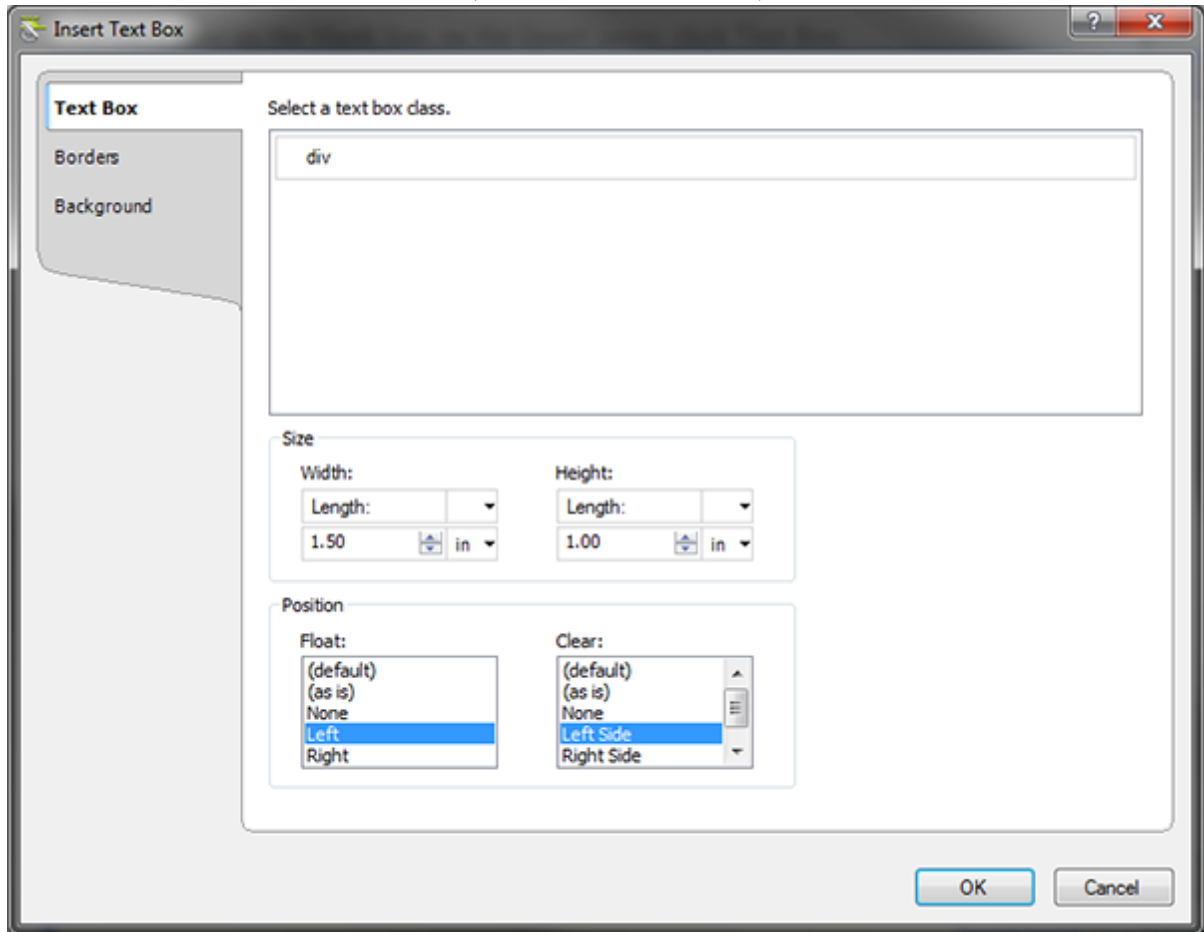
When you're done, you're ready to put text in the side-head. See the next section for more details.

Best practice: Using text side-heads

In this example, we're going to put the p.Note created above in the side-head but the process is the same for notes/cautions/warnings formats.

1. Open the topic.
2. Click at the beginning of the paragraph you want to place the Note. Press Enter.

- With the cursor on the blank line, on the Insert menu, click Text Box.



- Select the width of the text box. In this above example, we specify 1.5” and 1”.
- Set the Float to Left and Clear to Left Side.
- Click OK.
- Click in the text box. Apply the Note format you created in the section above.

Now you can resize the text box or add text or a graphic.

You’re done!

Using this method, you can customize and create complicated layout with sideheads on the right or left side of the page.



Complex numbering

Flare offers many ways to number in your documents. This section discusses some of the most common.

Best practice: Controlling auto-number formatting in lists

You can use complex auto-numbering in Flare. If you are familiar with auto-numbering formats in other products, you will see similarities in format and structure in Flare.

In Flare, you can click the Lists button and get simple lists, whether it's a bulleted list or a numbered list. There are not a lot of formatting options available to you in these lists. These may not meet your needs. They're not wrong to use, but you may want more control than is available in these lists.

If you need custom lists, with specific number fonts, for example, you should create paragraph formats with auto-numbering. Do it this way lets you use character formats to customize the bullet or number you want for the list.

If you're creating a numbered steps list format, there are 2 ways to do this. Neither is a better practice than the other, it depends on what you need.

NUMBERED LIST METHOD 1

Assign a numbering series to a paragraph style that introduces a numbered list. This method uses 2 styles but results in only 1 style for numbered lists.

For example

To print a file

1

2 and so on.

If your document style guide specifies to always use an imperative fragment (sometimes called a Stem) to introduce a set of steps, you can assign a numbering series to the imperative fragment style and set the style to restart numbering.

For example, if your imperative fragment format is called Procedure, you can assign the following numbering format and series to the Procedure style:

Enter format (preview below):

n:{=0}

The big red dog.

Then the numbering for the Numbered list would be:

Enter format (preview below):

n:{n+}

2 The big red dog.

The advantage of this method is that you have 1 numbered style to remember to use and, because the imperative fragment always appears before a numbered list, the list always resets itself to start at 1.

NUMBERED LIST METHOD 2

The second method also uses 2 formats but they are both numbered.

For example

To print a file

1

2 and so on.

Create two styles named, for example, Step 1 and Step 2+.

For Step 1, define the number format like this to reset the number back to 1:

Enter format (preview below):

n:{n=1}

1 The big red dog.

Then in Step 2+, define the number as to increment the numbers from Step 1 forward:

Enter format (preview below):

n:{n+}

3 The big red dog.

There is no right or wrong way to restart the numbering. Use the method that works best for you and your information.

Best practice: Military numbering in a project

Military numbering here is defined as:

1.0

1.2

1.2.1

And so on. You can easily do this numbering in Flare. Here's how.

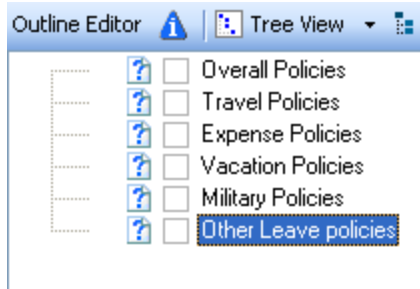
Note about using this numbering format with Tables: your table style cannot use captions. When you use the Caption option in the Table Properties or the Tables styles, the format for Caption does not allow auto-numbering. You must manually type the table caption before or after the table and then assign the text a paragraph style.

Create and assign styles that look like this:

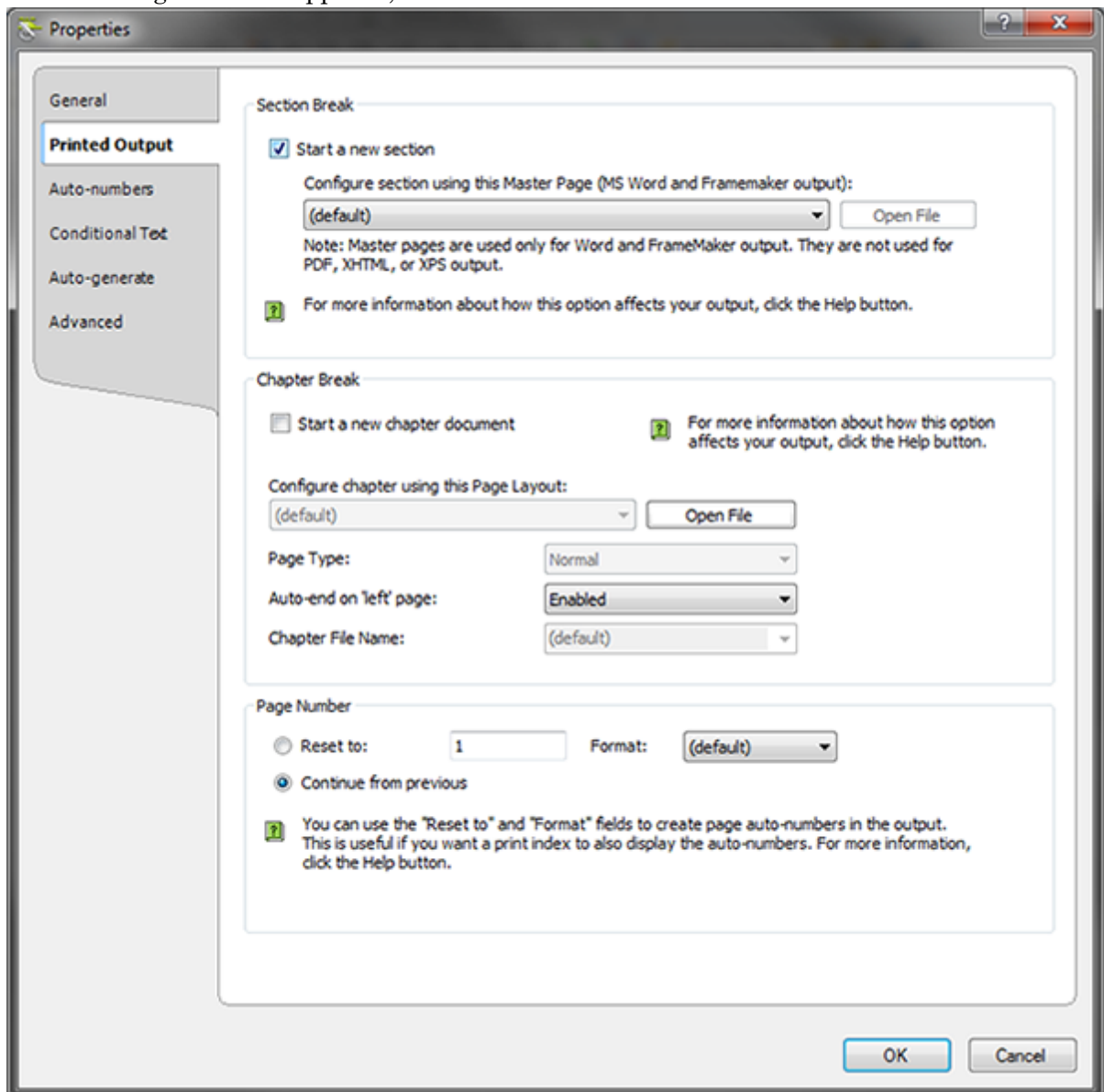
h1	h:{secnum}.\{n=0\}{ =0}{ =0}
h2	h:{secnum}.\{n+\}{ =0}{ =0}
h3	h:{secnum}.\{n}.\{n+\}{ =0}{ =0}
h4	h:{secnum}.\{n}.\{n}.\{n+\}{ =0}
h5	h:{secnum}.\{n}.\{n}.\{n}.\{n+\}
h6	h:{secnum}.\{n}.\{n}.\{n}.\{n}.\{n+\}
TableTitle	t:Table {secnum}-{n+}
FigureTitle	f:Figure {secnum}-{n+}

These styles will auto-number your headings, tables and figure captions. But you won't see the auto-numbering across topics yet. There's three more things to do.

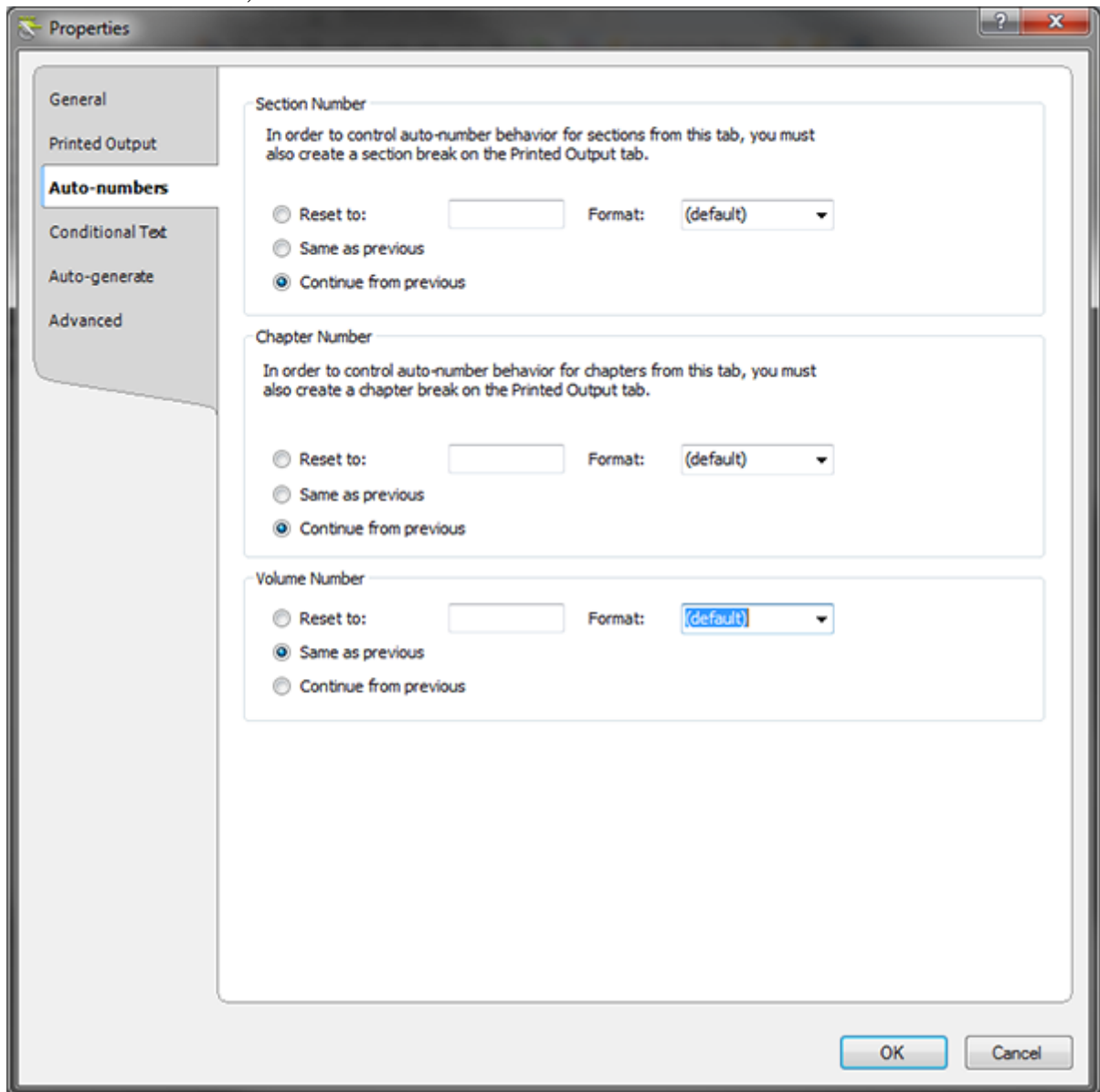
1. Go to the Project Organizer view and make an outline. Drag and drop the topics into the outline you want. For this example, let's assume a flat outline structure that looks like this:



2. After you have your outline the way you want it, click the first topic that should be a section. A section here is where you want the H1 to autoincrement. For example, it needs to change from 1.0 to 2.0. After you select that first topic, press F4.
3. In the dialog box that appears, click the Breaks tab.



- In the Breaks area, select Start New Section. Now click the Auto-Numbers tab.



- In the Section Number area, select Continue from Previous. This tells the topic that it should look at the last section that was numbered and increment by 1. If you want to change the numbering format, select what you want from the Format list. When you're done, click OK.
- The last thing to do now is create a Target. For detailed instructions on doing this, see the online Help.

When you create your target, you'll see the numbering across sections. Review it to make sure the numbering is behaving the way you want. You should be done!

Best practice: Including graphics on the Page Layout

You can put graphics on the master pages to customize your page layout design. For example, you may have a page layout where you want a custom graphic on the first page of the chapter or section. Or perhaps you want the company logo in the upper corner of the right and left pages. Because you can have multiple Header text frames on a single page, you have many options in page design.

These sorts of layouts are easy to do in Flare. Use the examples in this section to guide you.

Adding a graphic to the header on your page

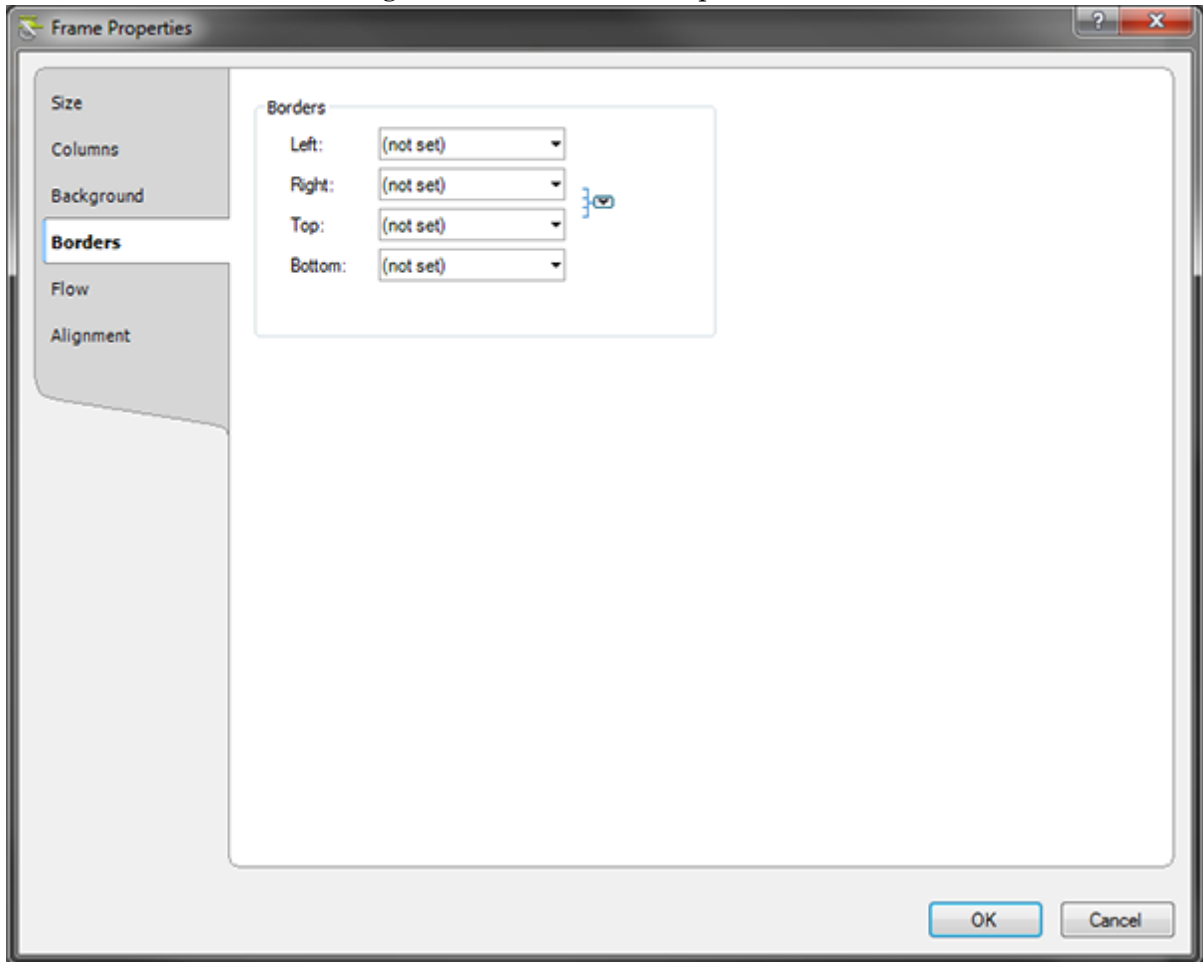
1. Open the page Layout that you want to add a graphics to. For example, you want a custom graphic on the First page.
2. Create a new page called First. Assign it to be a Page Type of First. Place a Header and a Body text box on the page. Drag the Body text box where you want it to be on the page. Drag the Header text box where you want it.



For details on how to do these things, see the online Help.

1. When you're done, you're ready to put the graphic on the page. For this example, we want the First page to look like the one on the left.
2. Still in the Page Layout, click the Header text box and press F2. Click No. The Frame Contents view opens. Click in that area.
3. On the Insert menu, click Picture. Browse and select the picture you want to place. Click OK until you return to the Frame Contents view. Now resize the graphic, align it, and do other placement tasks.

4. If you want a line under or over the graphic, you can do that in the Page Layout view. Click the Header frame. Right-click and click Properties.



5. Now select the border that you want to add and make your changes. When you're done, click OK.



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