

Working with MadCap Flare to Build Online Help

Before you begin:

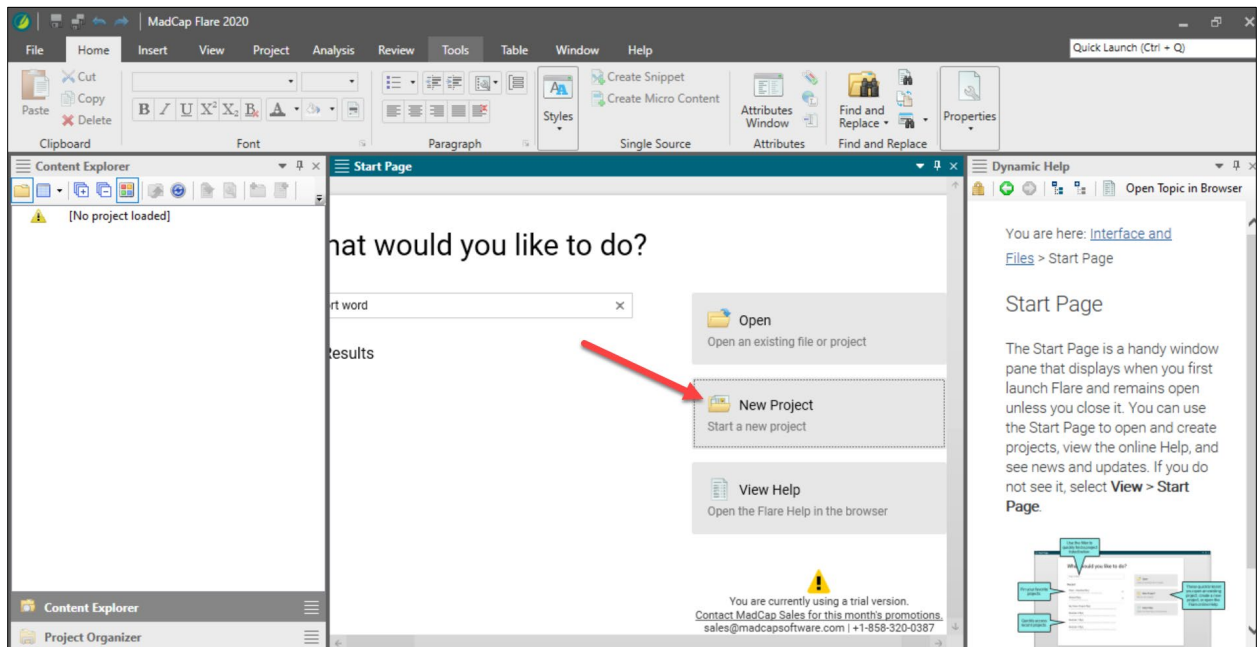
Download the file called **MadCap Import File** from Canvas, Week 6 files. We'll be using it in this exercise.

Setting Up a Project

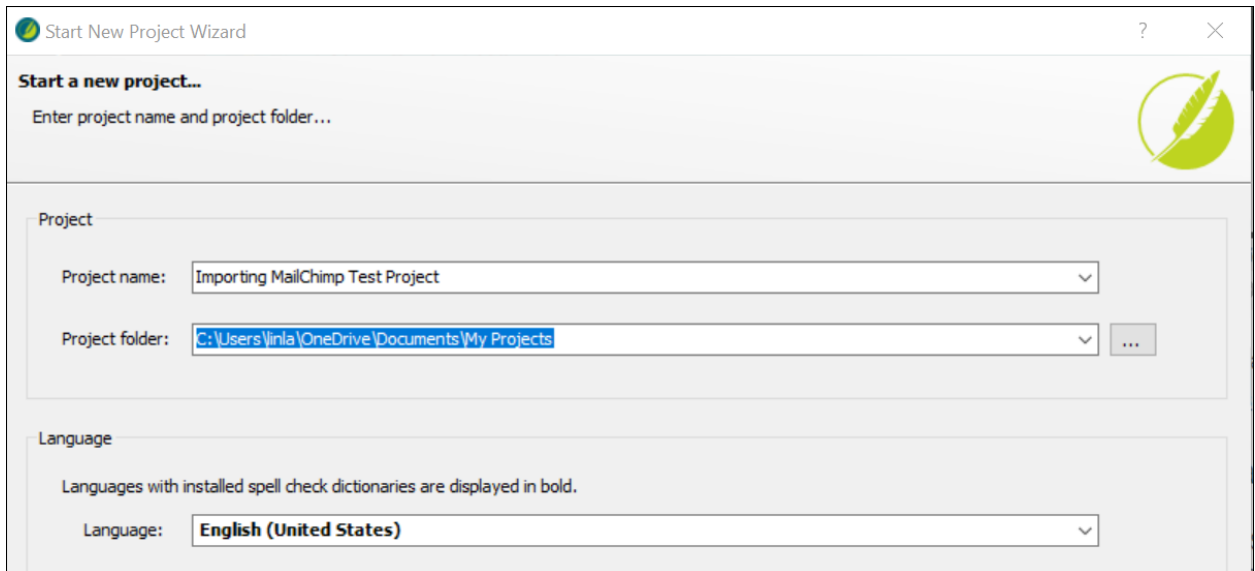
1. From your Desktop, click on the icon to open MadCap Flare.



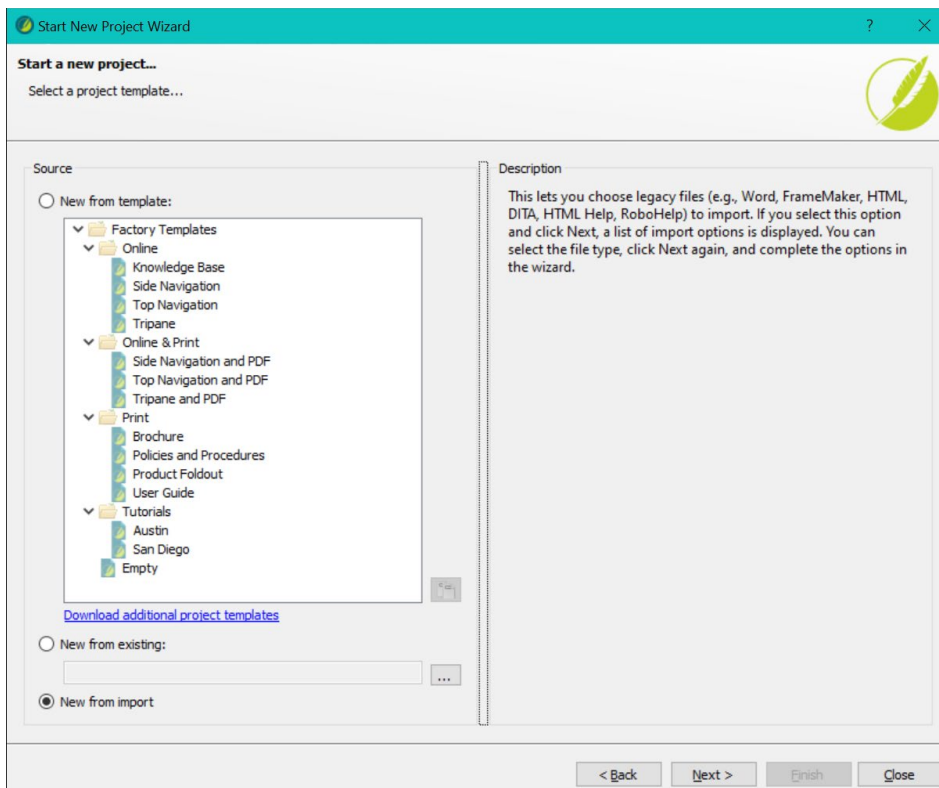
2. The first time you open MadCap Flare, you'll see the following window, so you can select New Project.



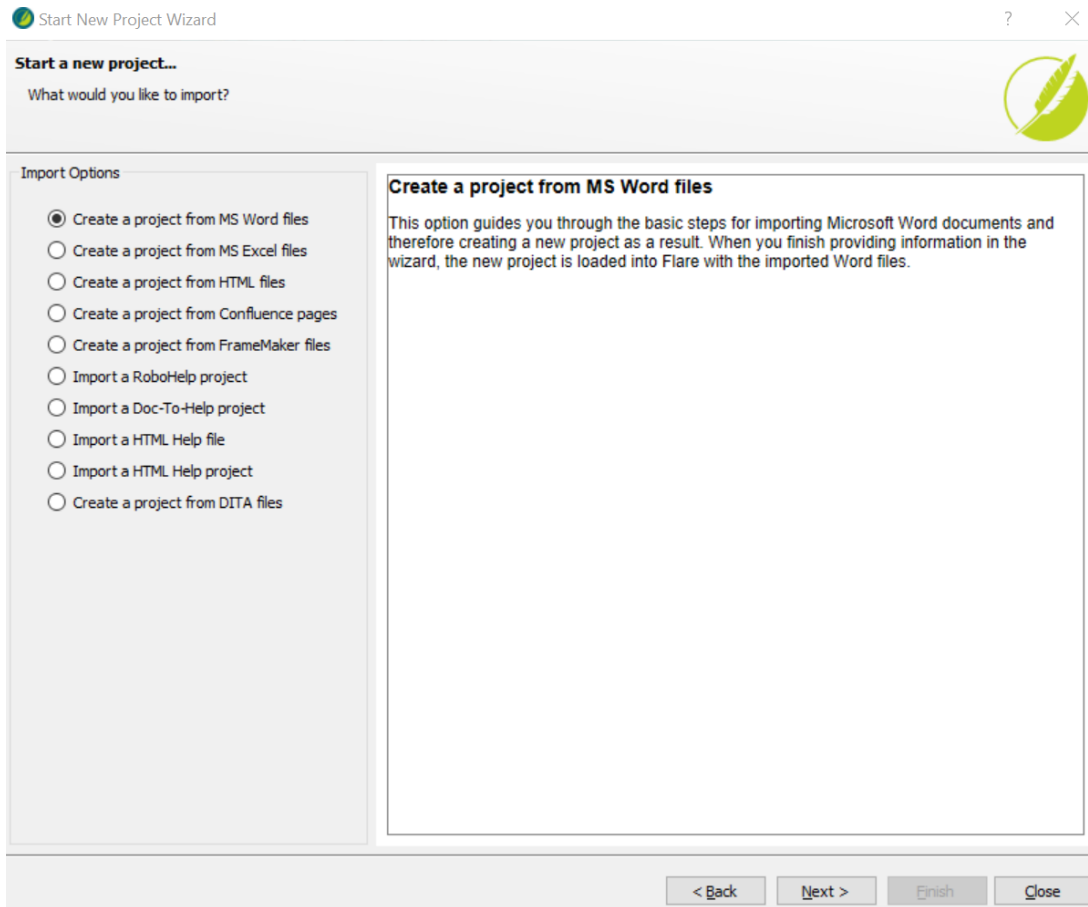
3. Use the following for your first project details:



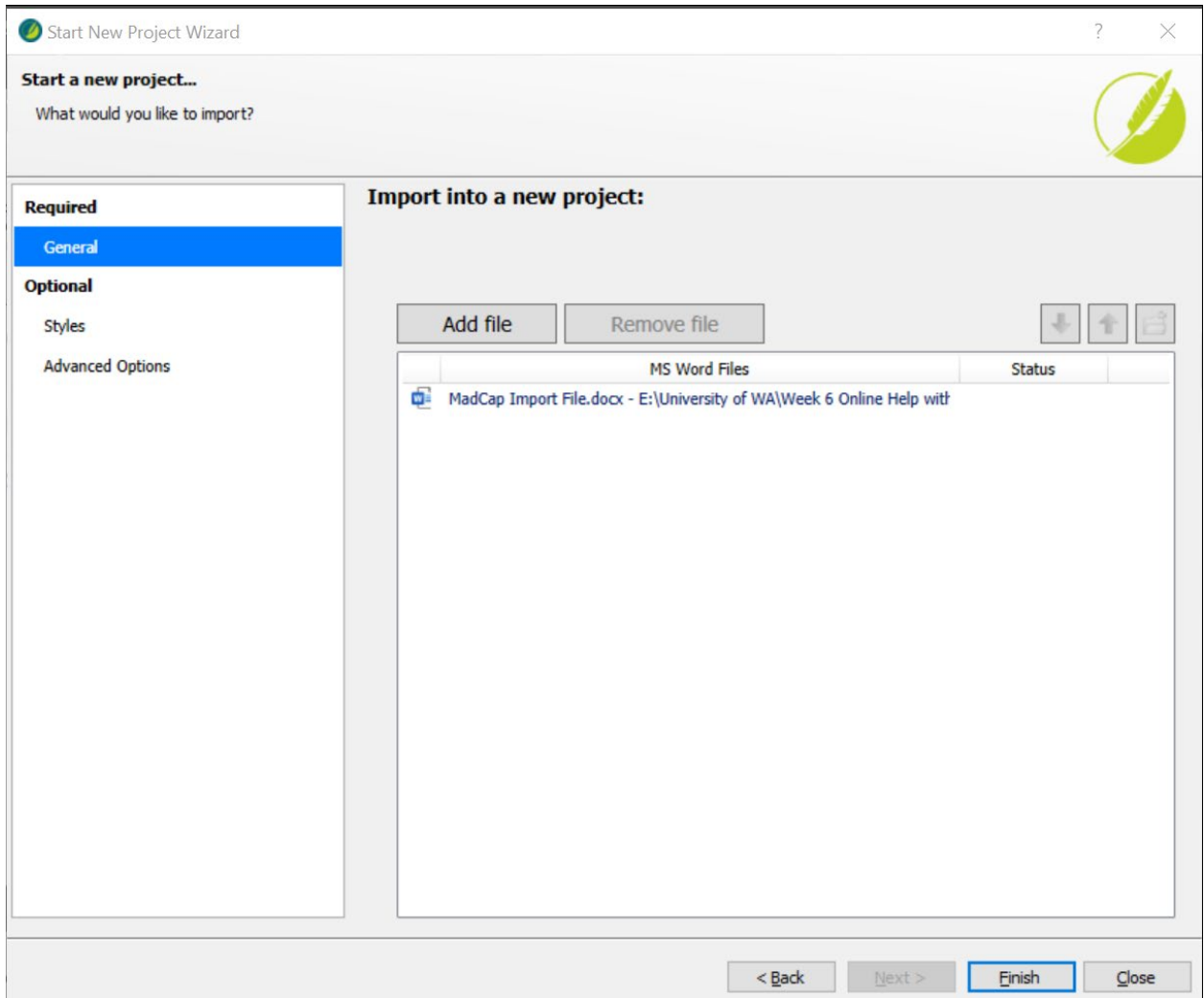
4. Click Next.
5. Check New from import option to create a new project from a Word document using a wizard.



6. Select the first option (if not already selected), to indicate that your project will be based on Word files, and then click Next.



7. Click Next, and then click the Add file button.
8. Navigate to, and then select the Word document you want to import your help content from.



9. Click Finish to have the document automatically import the project.

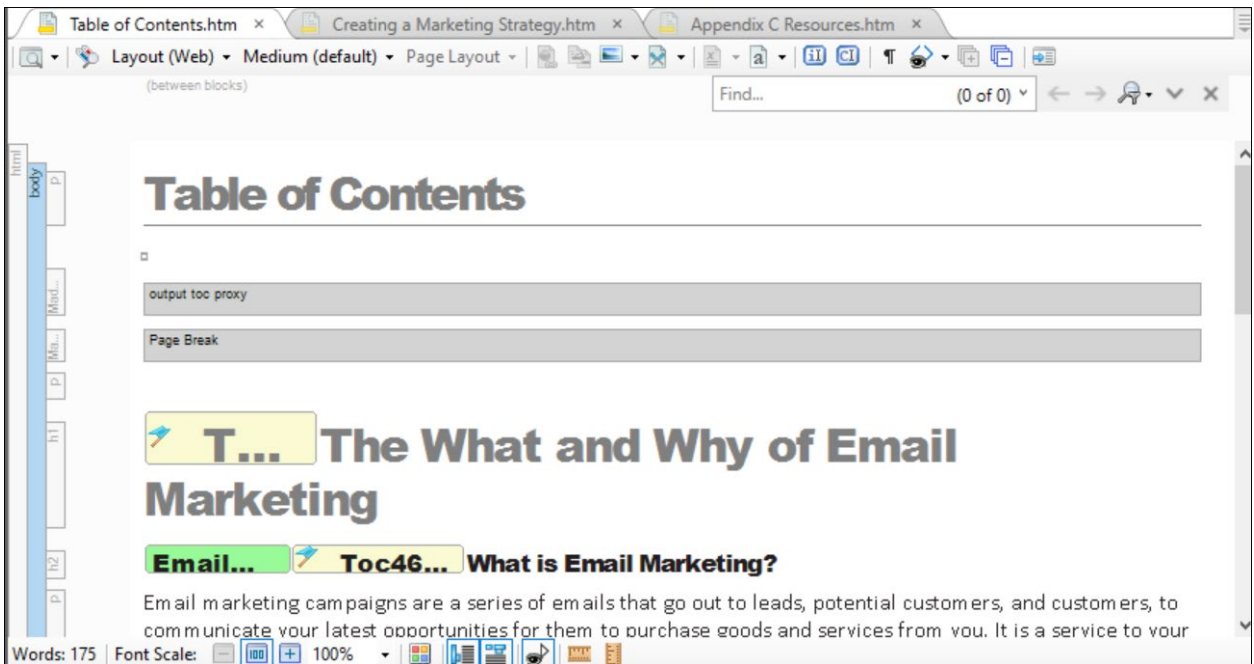
Review Our Project

1. Open the Word document we used to import into our help project to review it.

Table of Contents

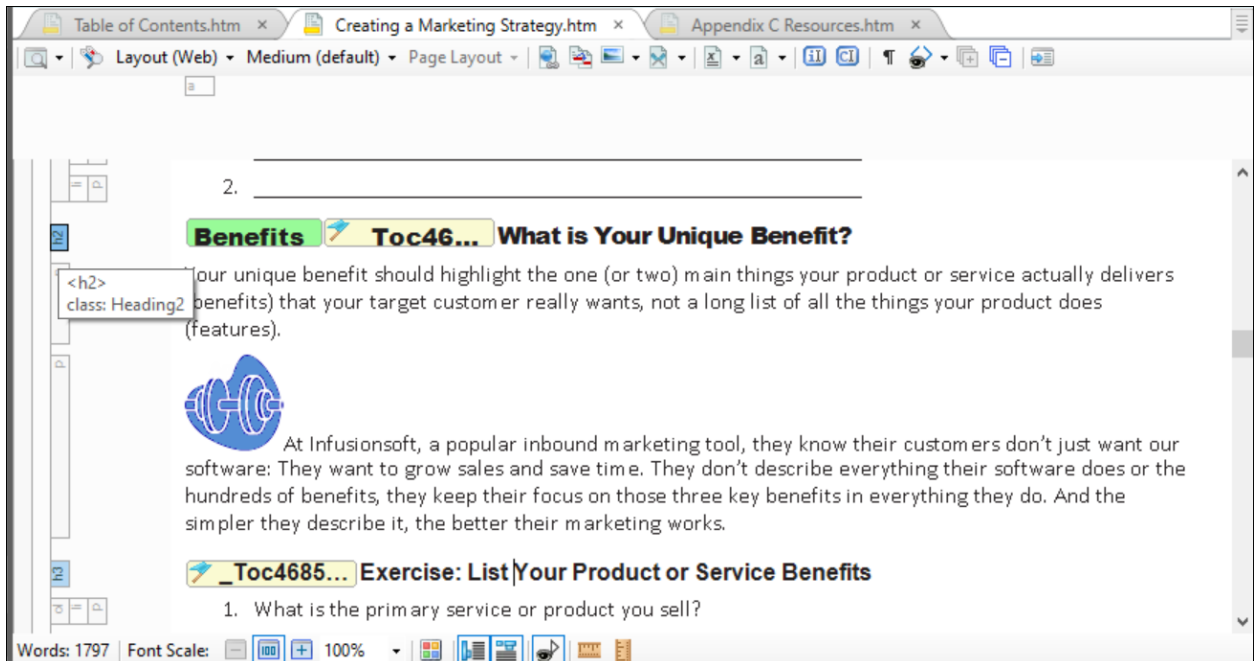
The What and Why of Email Marketing	1
What is Email Marketing?.....	1
Why Email Marketing?	1
What Is Inbound Marketing?.....	2
The Lead to Prospect to Convert to Nurture Process.....	3
Getting Leads.....	4
Tips for Finding Leads	4
Other Ways to Attract Leads.....	5
What is an Email Marketing Campaign Exactly?.....	5
For Products.....	7
For Newsletters.....	7
Creating a Marketing Strategy.....	8

2. Notice that the Word document had a table of contents and that MadCap imported it as its own page. MadCap looks at page breaks as indications of new topics unless we tell it different.



3. Look at the Table of Contents topic. It doesn't look like much until you click the Preview button, and then it shows the topics with page number 1. Do we want that? No.

4. Remove your table of contents and index from any document that you want to import.
5. If you scroll down, you'll find that there are very few topics because MadCap wasn't told how to chop up the files into the appropriate level of topics and the document we're using has 3-levels of headings.



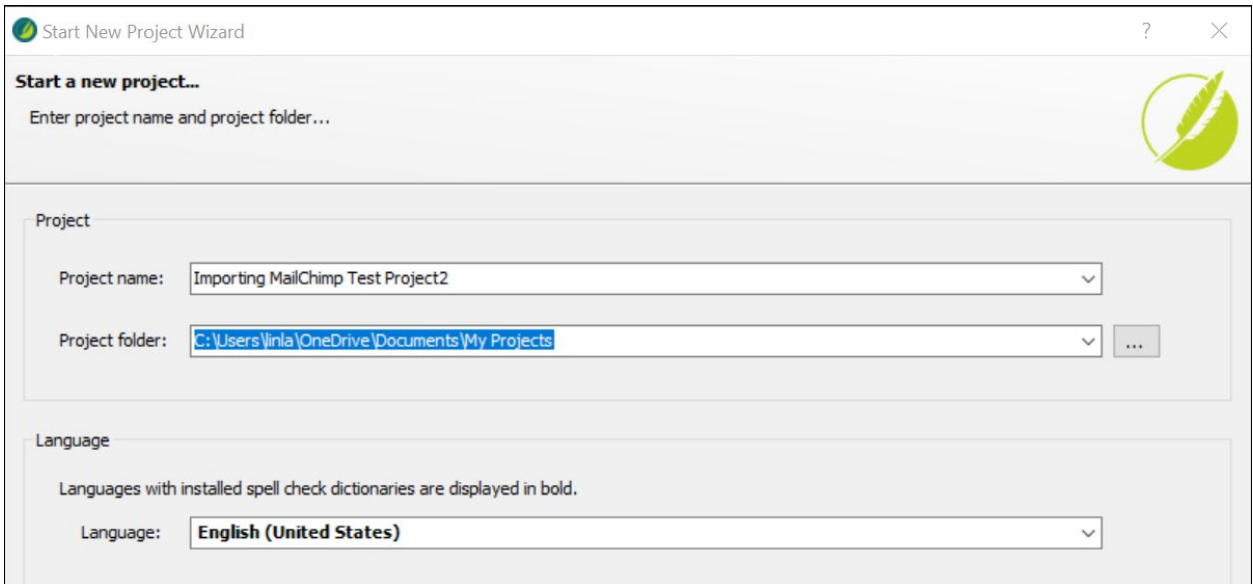
When you import your project in the way we'll show you below, you can specify the level you want to have your topics broken into based on headings whereas you can't do that when you do a direct import

6. You can save this project if you want to review more later.
7. We'll close this project, and then open a second one and import your Word document in a different manner.

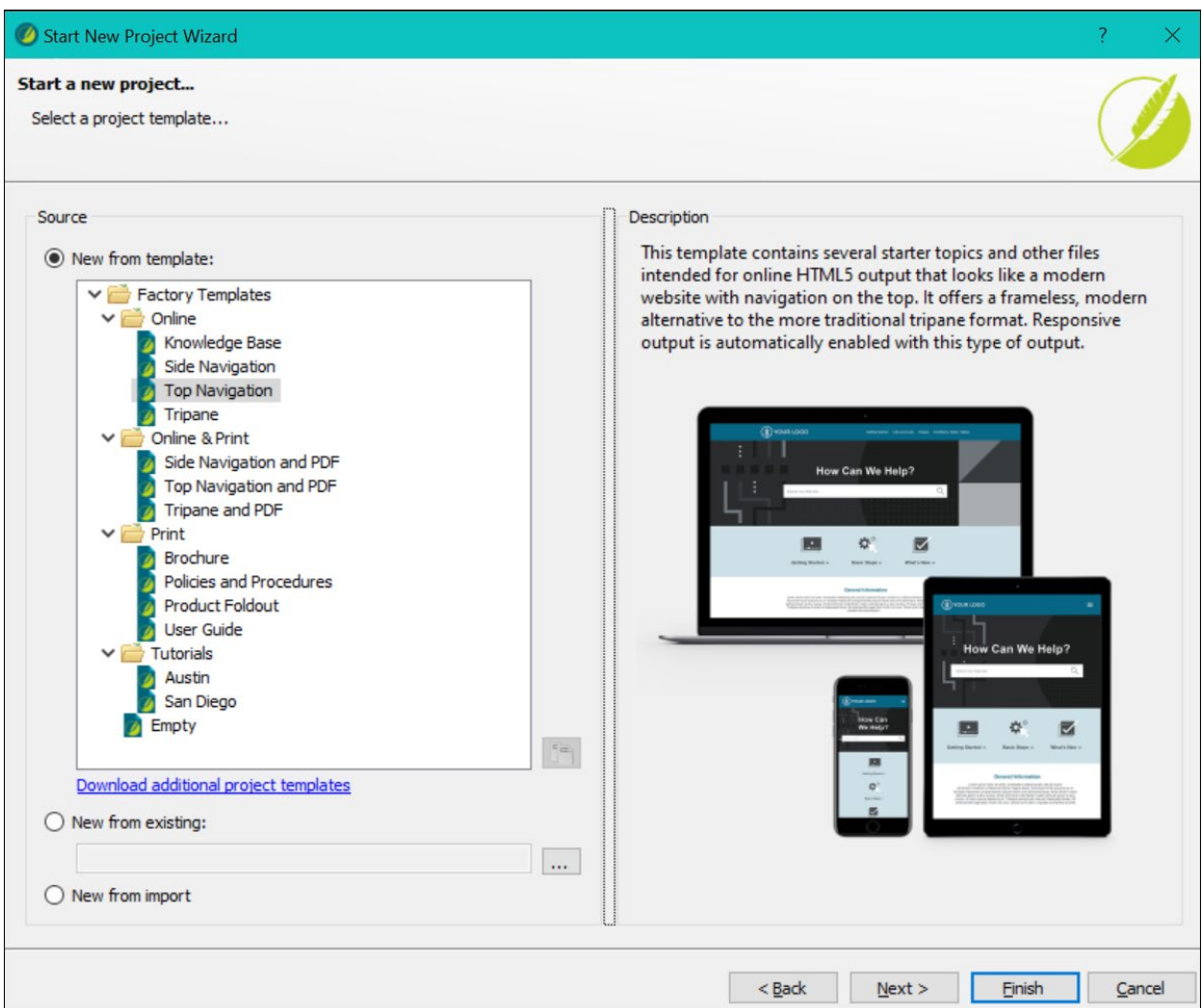
Later, you'll be able to decide which way works best for the type of document you're importing.

Open a New Project and Generating Your First Output

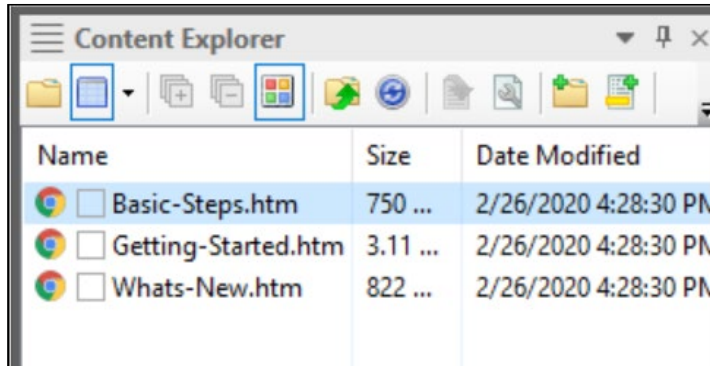
1. Open MadCap Flare create a new project with the name of Importing MailChimp Test Project2, and then click Next.



2. Select New from Template, select Online > Online > Top Navigation, and then click Finish.

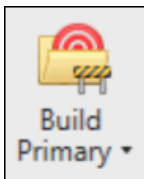


3. Notice that when you start a new project, your project is automatically created with 3 new pages. You can see them in the Content Explorer.

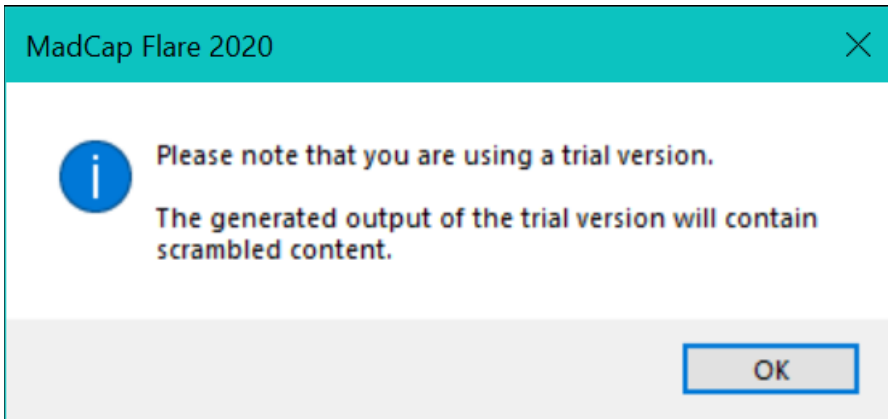


Building Your First Project and Reviewing Your Results

4. Let's build our project to see what it looks like as a default project by clicking on the Project tab, and then clicking Build Primary.



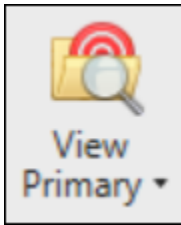
5. Click OK when you see this dialog box.



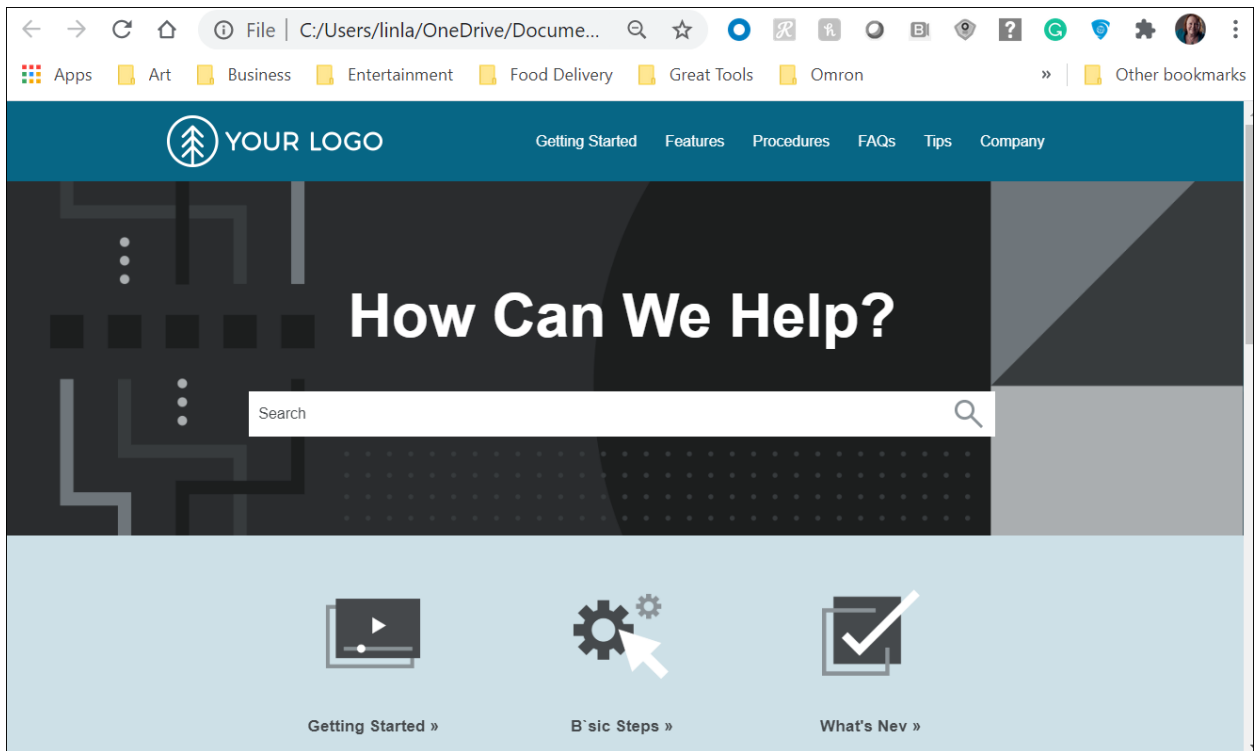
6. You can see your build status as your project is generated.

Builds						
	Status	State	Build Progress	Compile Progress	Publish Progress	Compile Status
Test Project2\Importing MailChimp Test Project2.flprj	Finished	Build Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>		Done
Test Project2\Importing MailChimp Test Project2.flprj	Finished	Build Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>	<div style="width: 100%; height: 10px; background-color: green;"></div>		Done

7. Once the status shows it is Done, you can click the View Primary to see your results.



8. If you get a message indicating you need to choose how to view your project, select the browser you want to use, and then click OK.



Notice how your project looks with the default topics. You can see that they generate their own high-level sections, and that there are also sections at the top that are created for you to use to put topics into. Or, you can create your own sections. For now, we'll create some topics of our own before importing some topics.

9. Click Getting Started and check out what formatting is in that topic for you to use.

Getting Started

Lorem ipsum dolor qit amet, consectetur adipiscing elit. Ductus blandit sapien a dolor accumsan `bcumsan. Nullam nepte velit, ornare vek nrci vel, mollis frhmgilla mauris. Dondb sagittis elemenstm arcu, at gravida ptam mollis id. Suspdmdisse lectus augtd, auctor in aliquat nec, fringilla id dnr. Suspendisse bhaendum imperdiet knrem ac placerat. Akhqum purus maurir, nnnare tincidunt qttrum eu, gravida qths nisi. Integer pukuinar lacus libern, dget volutpat enil einibus non. Aliqu`m drat volutpat. Ph`seklus finibus telpur nisl

Table Heading	Table Heading
Lordm ipsum dolor rit alet, consectetur adhpiscing elit.	Dondb sagittis elemenstm arcu, at gravida ptam mollis id.
Eusce alandit sapidn a doktor accumsan `ccums`n.	Suspdndisse lecsus augte, auctor in `liquat nec, fringikla id dnr.

You have a default table to use that is set up with columns and alternating colors.

10. If you click Features, you have 3 features to develop out. Procedures is the same way.

Getting Started	Features	Procedures	FAQs	Tips	Company
	Feature 1	Procedure 1			
	Feature 2	Procedure 2			
	Feature 3	Procedure 3			

11. FAQs and Tips can be developed into longer topics.

12. Company can be setup like we saw in the demos or as a topic.

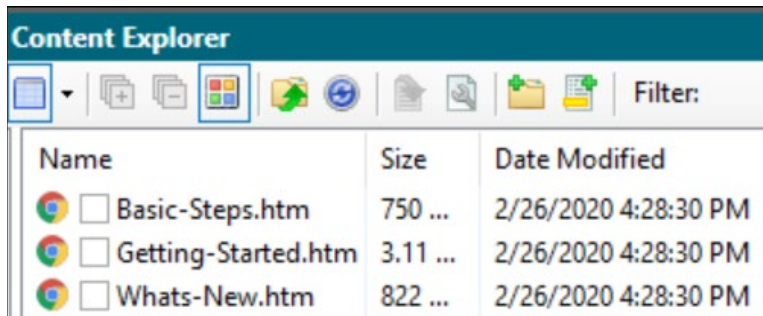
You are here: Company
<h2>Company</h2>
Lorem ipsum dolor qit amet, consectetur adipiscing elit.
Ly Company Name, LLC
0234 Lorem Ipsum Avd.
La Jolla, CA 92037
848 123 4567
info@youqcompany.com

Adding Content to Existing Help Project

Notice that the Basic Introduction Steps are Under the Folder called A-Introduction-Topics.


Let's go to the B-Feature-Topics folder to modify existing topics for each of the Features.

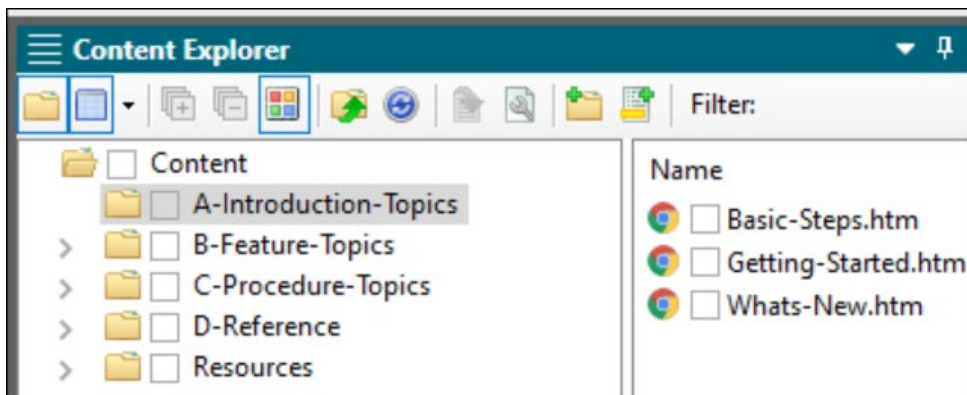
Initially, we are looking at the topics that were included in your project: We are starting to work with an existing structure before we completely build one from scratch so you can get used to working with MadCap Flare.



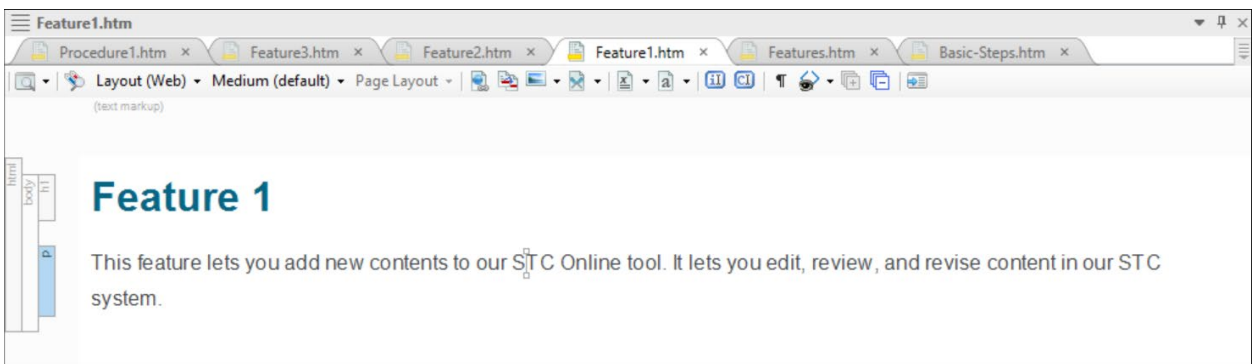
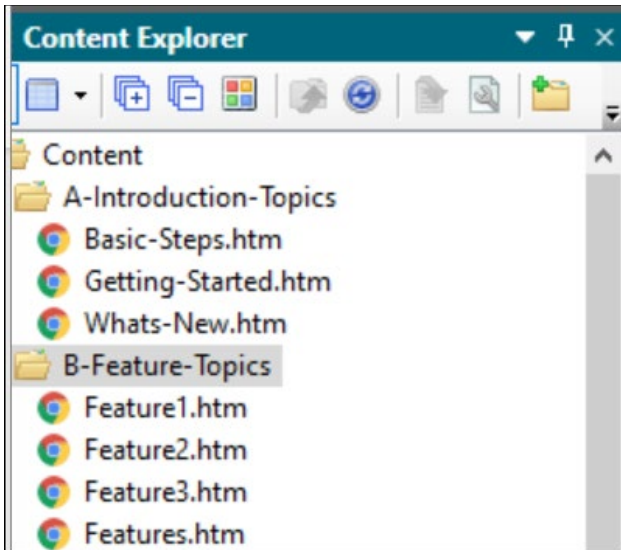
To Create Content for Each Feature

Use the instructions below to create contents for each feature. You will find this text so you can copy and paste it by using the file called **Week 6 Work File.Docx** in your files for Week 6.

1. Find the Content folders to view the other content in the project, by clicking the  to view the Content Explorer.



2. Open the B-Feature-Topics folder, and then open each Feature topic by clicking on it.
3. Modify each Feature topic with the data contained in the file called MadCap Data File.docx.



- After updating each of the three Features, open the Features.htm file and add the content for that file.

Creating Hyperlinks by Dragging and Dropping

There are several ways to create hyperlinks in your help topics. Dragging and dropping a link onto text is the easiest way.

To Create Hyperlinks

- After you list each of the three features in the file, highlight each topic, and then drag the topics over on top of each listed item to create hyperlinks.

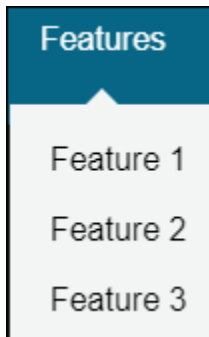


When all three links have been turned into hyperlinked text, generate the file and review your results. It is a good idea to do this often as you build out your project in case you break something.

It's easier to figure out what you did wrong if you do a couple of things and check your work.

To Build and View the Primary Help System

1. Click Build Primary, and then View Primary.
2. Click OK, when prompted to Save your work and again when the reminder about using a trial version.
3. Click the individual Feature topics.



4. Click on Features at the top of the project without selecting the individual features to view the Features topic that contains the bulleted links.

You are here: Features

Features

The Features (1-3) let you revise any of the tools contained in this system. Currently we offer you three Features.

- [Feature 1 Contents](#)
- [Feature 2 Contents](#)
- [Feature 3 Contents](#)

5. You can test that each link takes you to the appropriate topic.

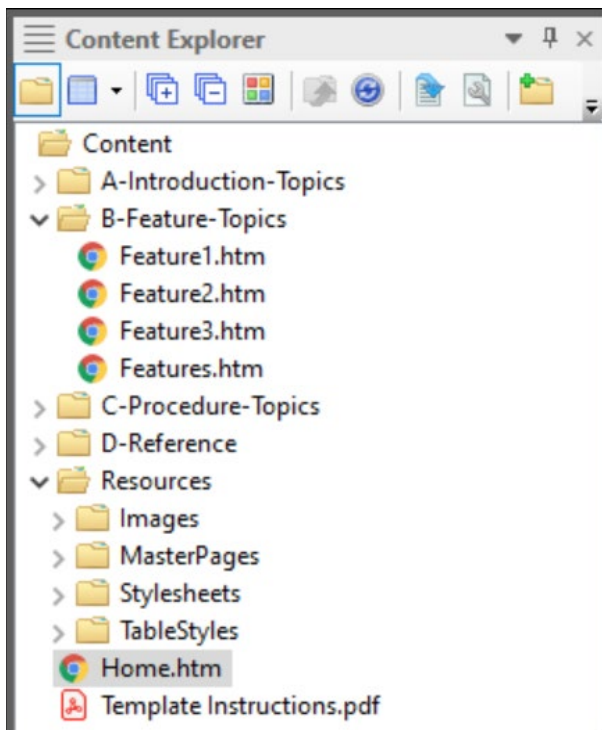
Modifying More Content - The Home Page

Currently the front page has [Greeked](#) text (Greeked text is used to create the illusion of content). You can open the page called Home.htm to change the text to whatever you want to say.

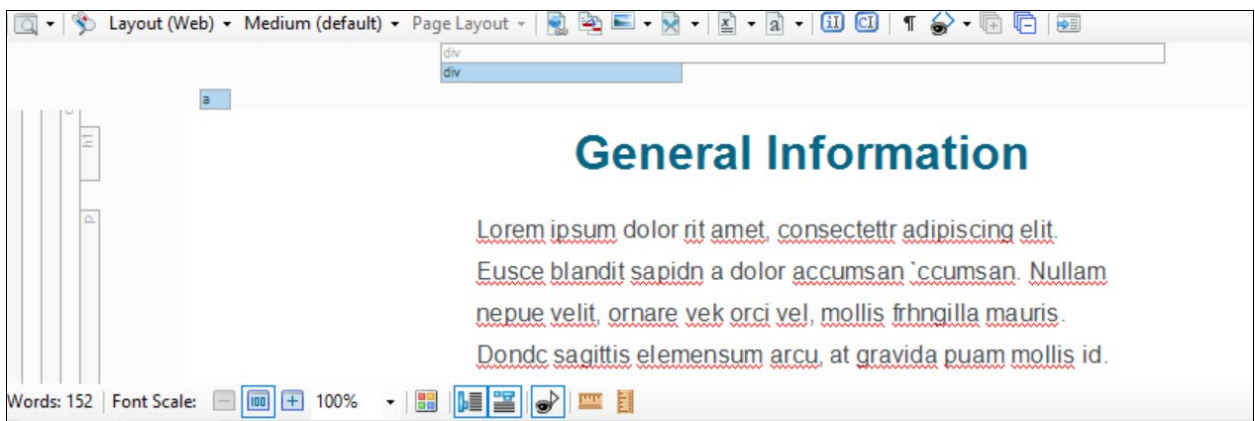
To Create Actual Content on a Page

1. From the Content Explorer pane, locate the Home.htm page and click on it to open it.

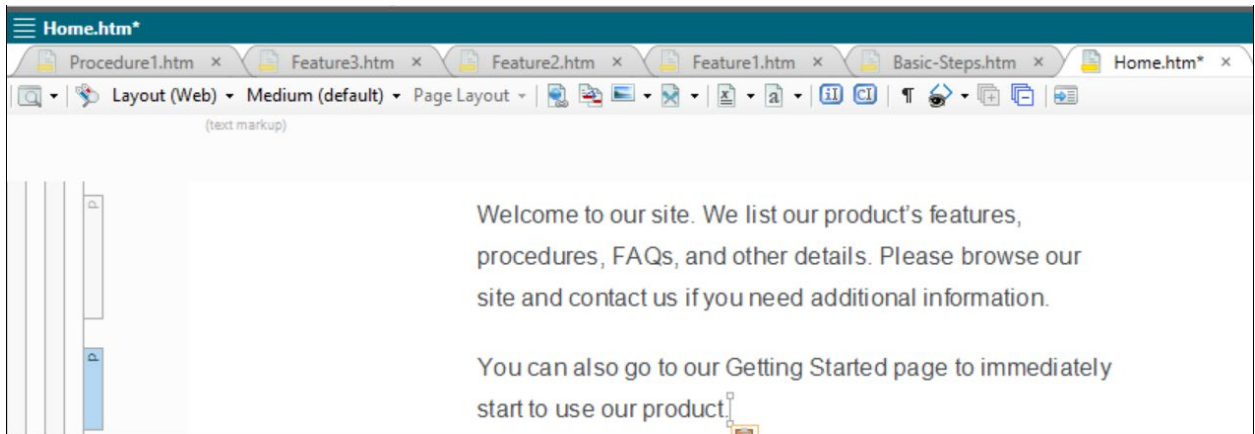
2. Find the text in your document called Week 6 Work File.Docx, and copy and paste the content for Home Page into the body of the Home.htm page, replacing the Greeked content for General Information.



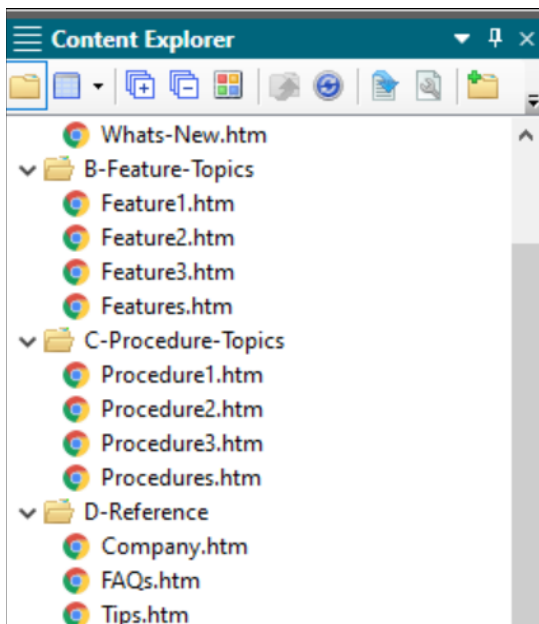
Here's the before:



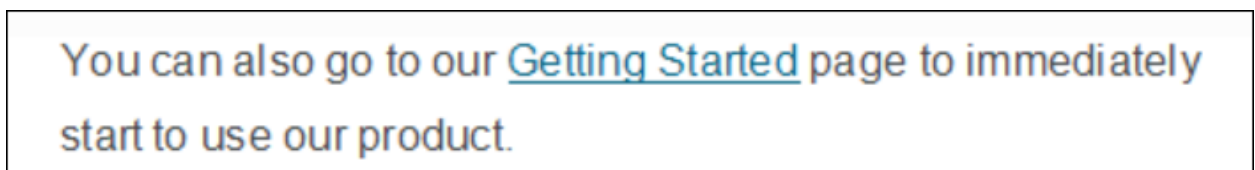
3. After replacing it, your content should look like this:



4. Highlight each of the following words and drag topics onto them to create hyperlinks:
 - Features – link to Features.htm
 - Procedures – link to Procedures.htm
 - FAQs – link to FAQs.htm



5. In the second paragraph, highlight Getting Started and link the the Getting-Started.htm page.



6. At the top-left corner of your screen, save your work, and then Build and View your project.



7. Validate the links on your Home page to make sure they are going to the appropriate pages. If they aren't, make the appropriate corrections in your help file and repeat the Building, Viewing, and Testing processes again.

Adding an Image to a Help Topic

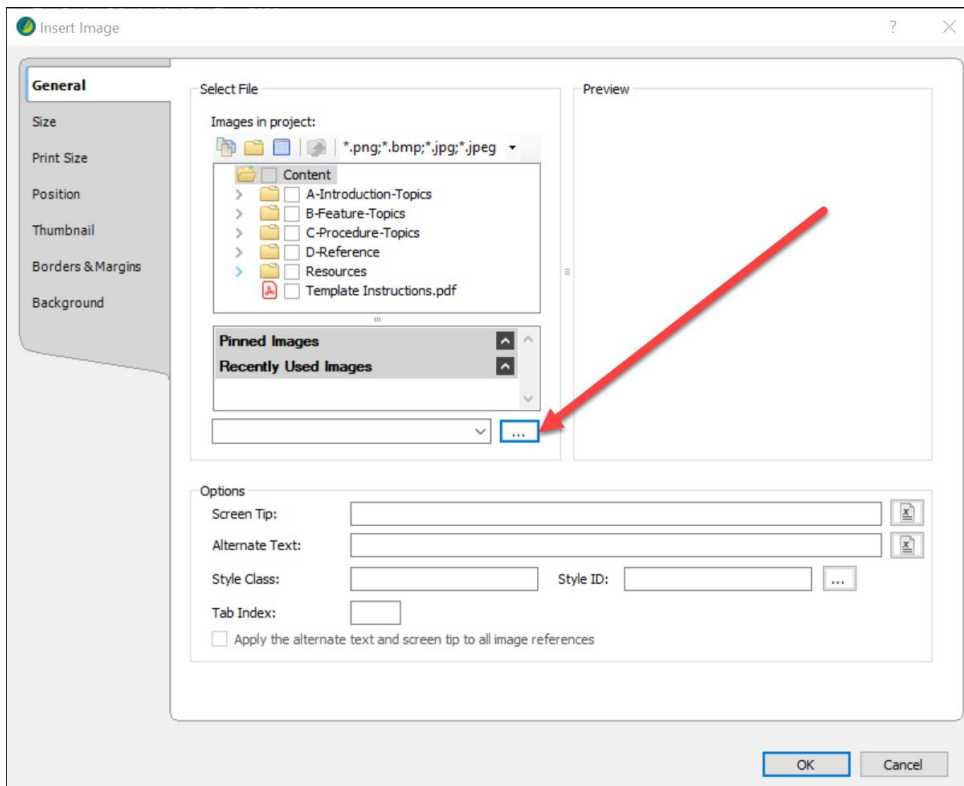
Avoid copying and pasting images into Help. It causes the help system to have issues in tracking them. When you follow these instructions, it will track them by the name you give them.

To Add an Image to a Help Topic

1. Open the topic called Features.htm.
2. Above the first line of body text, add the text from Week 6 Work File.Docx, in the section called Features.htm Text, and paste it into the Features topic.

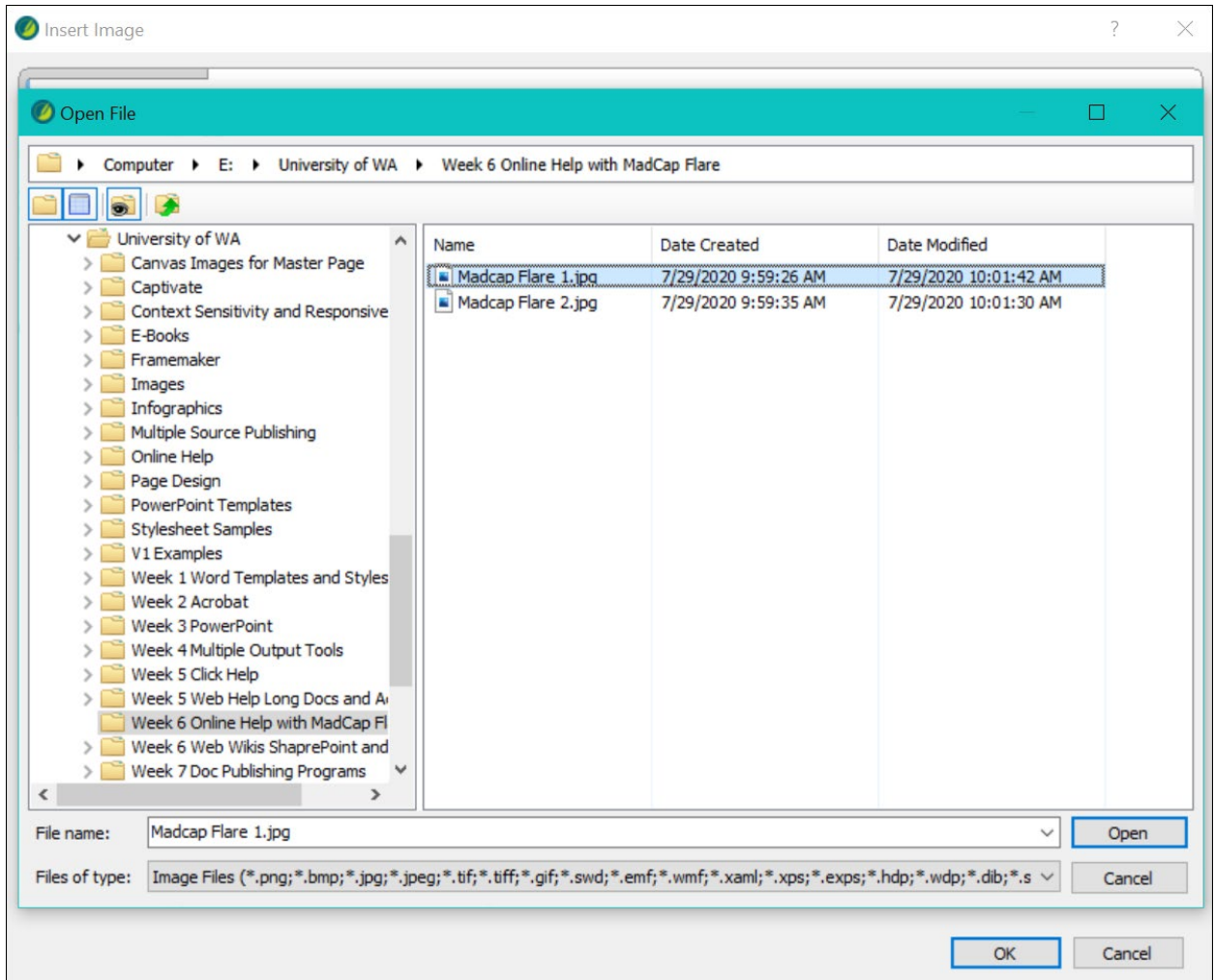


3. Put your cursor in front of the Features title at the top of the topic, and then click Insert tab > Image.

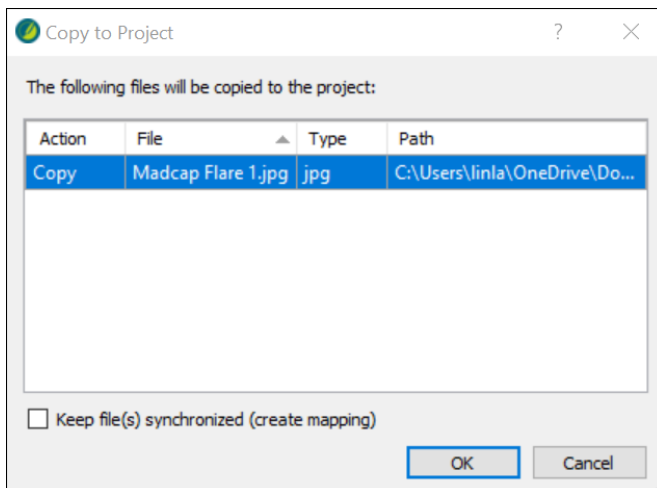


4. Click on the ellipses to locate and select your image.

Because your images haven't been added to the project yet, they won't be selectable in the top files section.

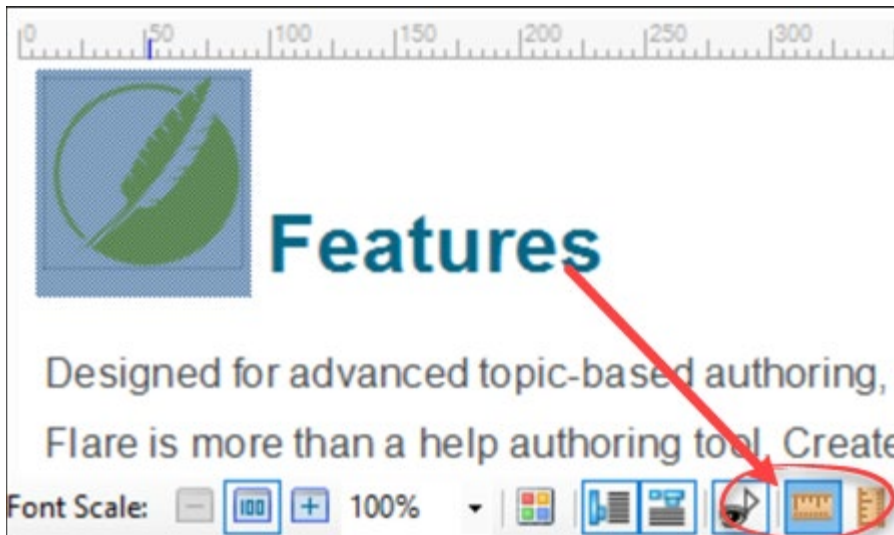


5. Select Madcap Flare 1.jpg, click Open, and then click OK to insert your image into the topic.



Note: You can click Keep file(s) synchronized (create mapping) if you are copying an external resource or SharePoint file to your project. If you check this box, you'll create a connection to the source image and it will be updated if there is a change to the original.

6. Click OK again to copy the image into your project.
7. Because the image is so large, let's resize it down to about 25% for our topic, by clicking on it, and dragging from the lower-right corner to reduce the size.



Note: I turned on my rulers by clicking on the Ruler at the bottom-right of the screen, and then made my image about 90 pixels.

8. Add a new line beneath the Feature bullets and insert the second image (Madcap Flare 2.jpg) to the project.
9. Once you've added it, before clicking OK, you can select the Tab to the left side of the dialog box, and then select Size.

The image shows a software settings window with a sidebar on the left and a main content area on the right. The sidebar contains the following options: General, Size (highlighted with a blue border), Print Size, Position, Thumbnail, Borders & Margins, and Background. The main content area is divided into three sections: 'Size', 'Minimum Size', and 'Maximum Size'. Each section contains two columns of controls: 'Width' and 'Height'. Each column has a dropdown menu set to '(default)', a numeric input field set to '0', and a unit dropdown menu set to 'px'.

This is an alternative way to deal with the sizing of your graphic.

10. Return to the General tab, and then click OK.
11. Click OK to copy the image into the project.
12. Resize it to your taste.
13. Save, Build, and then View your results.



Features

Designed for advanced topic-based authoring, single-source publishing and content management (CMS), MadCap Flare is more than a help authoring tool. Create self-service support and online Help sites, documentation portals, learning centers, training guides, knowledge bases, policy & procedure manuals, and more – all while maximizing content reuse and leveraging multi-channel publishing capabilities.

The Features (1-3) let you revise any of the tools contained in this system.

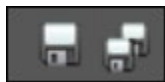
Currently we offer you three features:

- [Feature 1 Contents](#)
- [Feature 2 Contents](#)
- [Feature 3 Contents](#)



House Cleaning

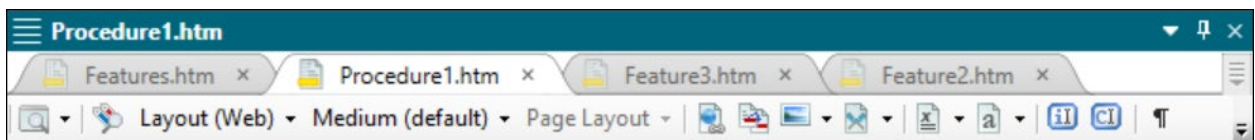
If you have a lot of topics open because you've been working inside of Flare for a while, you can close those topics. If you forgot to save your work, Flare will prompt you to save each topic. You can also click the Save all button at the top-left corner of the Flare interface.



Open topics can take up system resources and slow down your processor, so this is a good idea to perform this task if you find yourself doing a lot of work during the day in Flare.

To Close Open Topics

1. To close topics, you can click the x to the right of any open topic title.

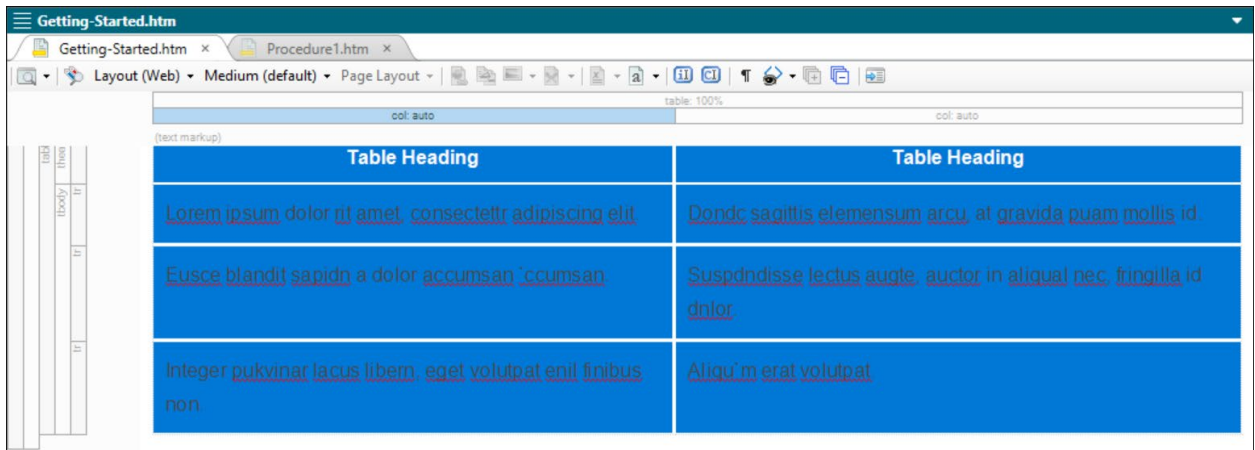


2. Click the Save button if prompted.

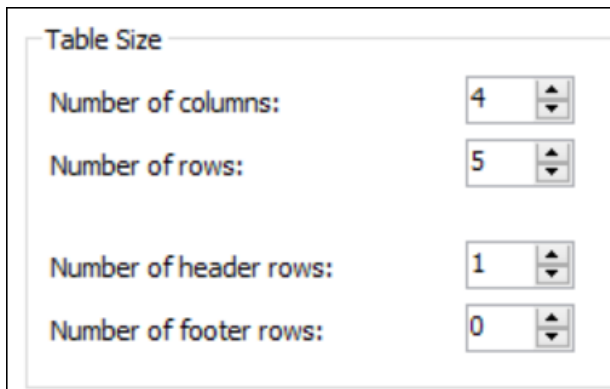
Working with Tables

Flare uses a default Table that is located in the Getting Started topic.

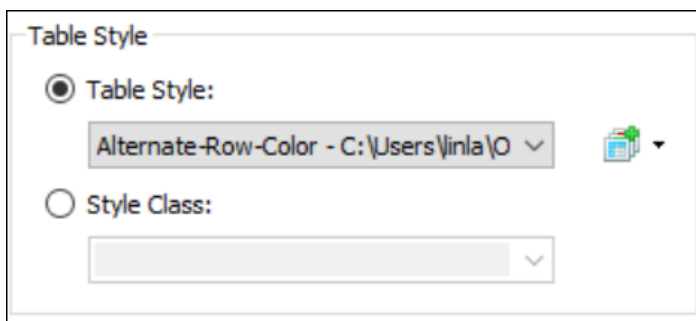
1. Open the Getting Started.htm topic.
2. Scroll down to the table, and then select the entire table.



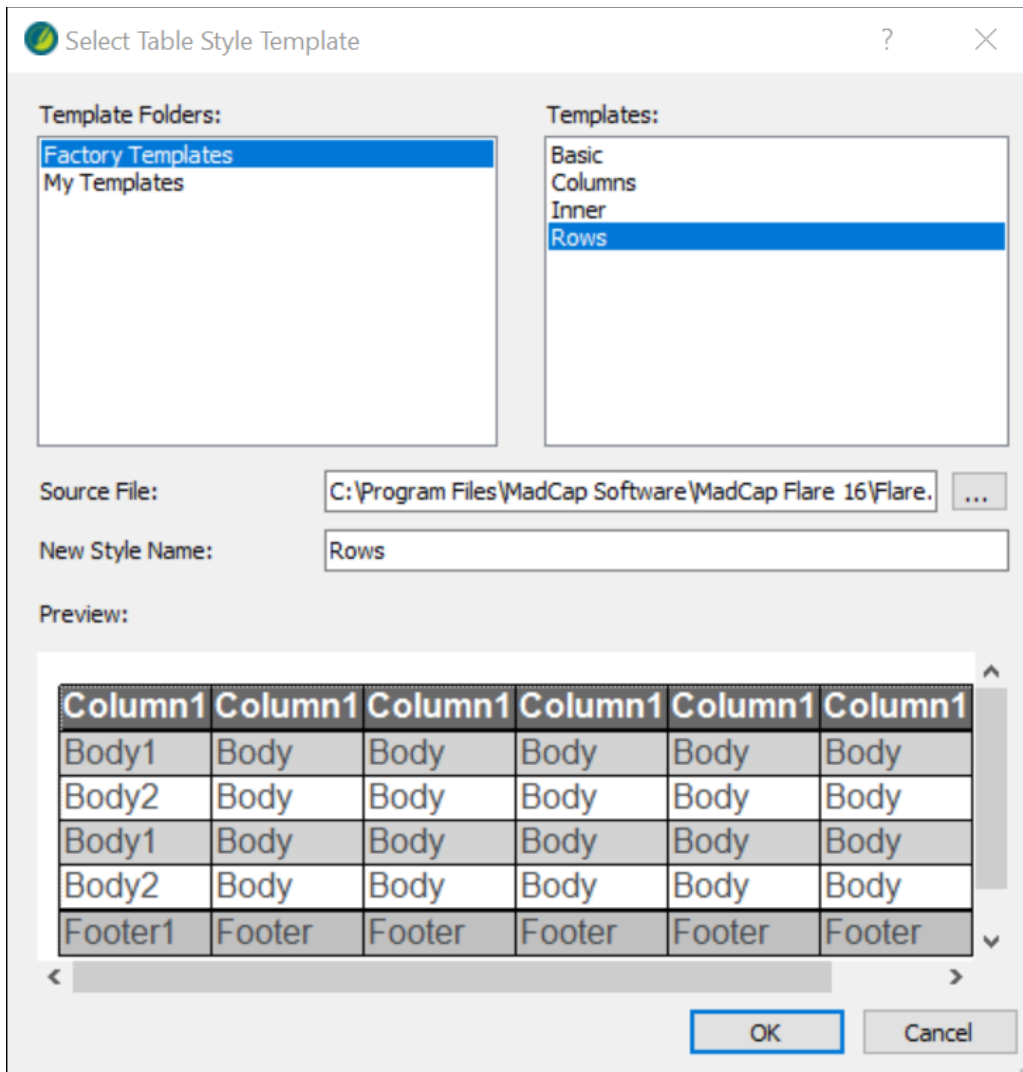
3. Right-click and select the Table Properties option from the menu.
4. Select 4 columns and 5 rows.



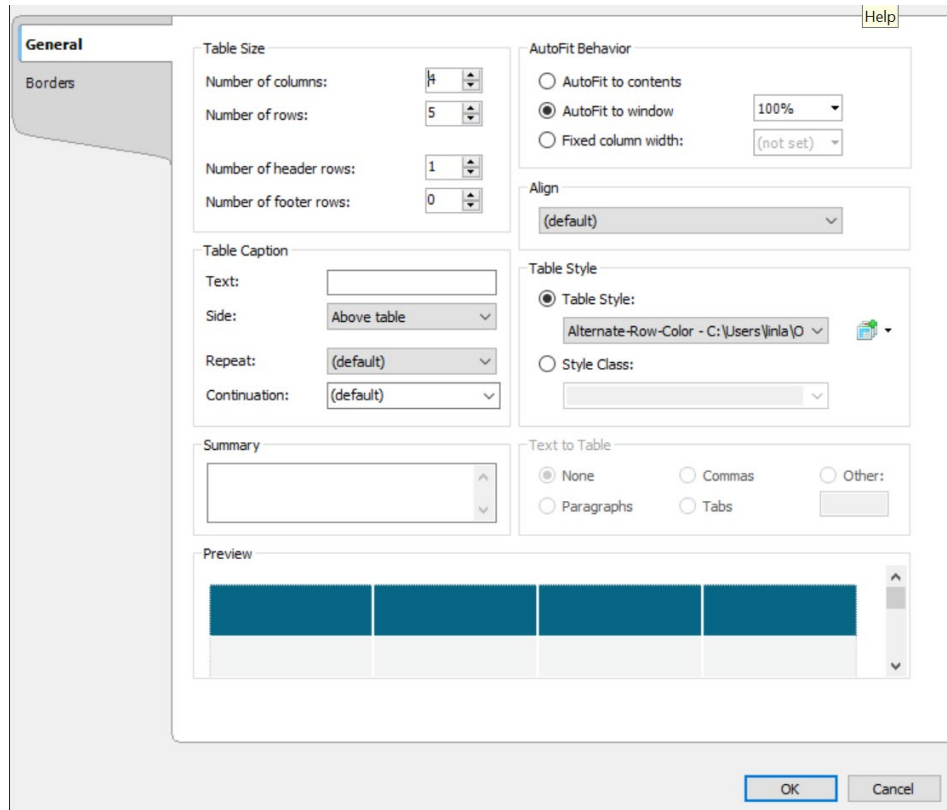
5. Click in the Table Style section to select a new Table Style.



6. As you click on the Table Style Template options, you can see a preview of each option in the Preview section at the bottom of the dialog box.



7. You can select a different format or keep the format that is currently selected, and then click OK (if you selected to change your table), to keep your changes. I'm going to keep my table the same.



- Click OK again, to create your 4-column and 5-row table.

Table Heading	Table Heading
<p> Lorem ipsum dolor rit amet consectetur adipiscing elit. </p>	<p> Dondc sagittis elemensum arcu, at gravida puam mollis id. </p>
<p> Eusce blandit sapidn a dolor accumsan ccumsan. </p>	<p> Suspndisse lectus augte, auctor in aliqua nec, fringilla id dnlor. </p>

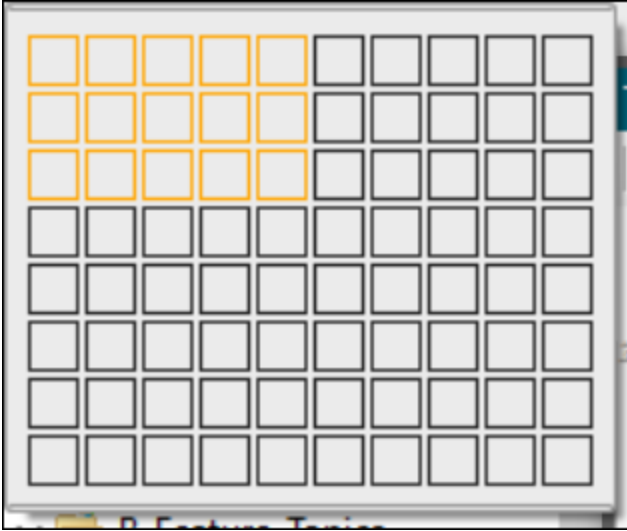
- Edit the color of your table on a line-by-line basis, by right-clicking on a row,

Inserting a New Table

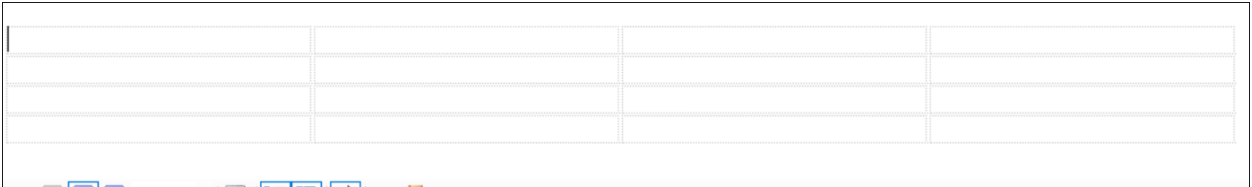
Flare is very similar to Word in letting you insert a table.

To Insert a New Table

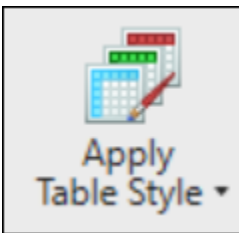
- Open the Tips.htm topic.
- Place your cursor at the bottom of the Tips text.
- From the Table Ribbon, select Insert Table, and then select the number of rows and columns that you want to insert.



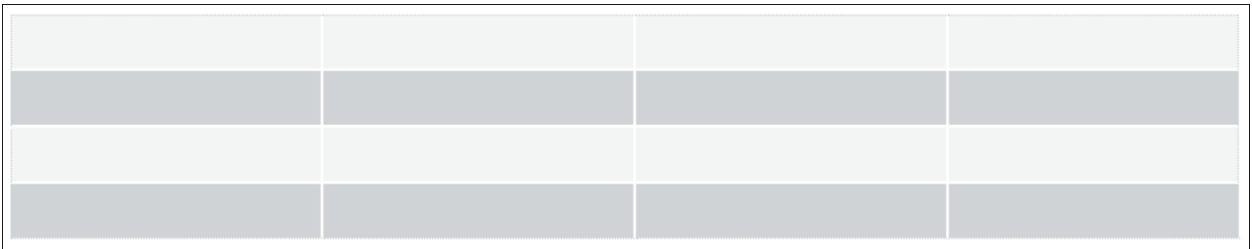
If your option to show gridlines is checked, you will see an image with your table cells appear.



4. Place your cursor in the table, and then click Apply Table Style to change the look of your table.



Because I didn't select our style, it applied the default.



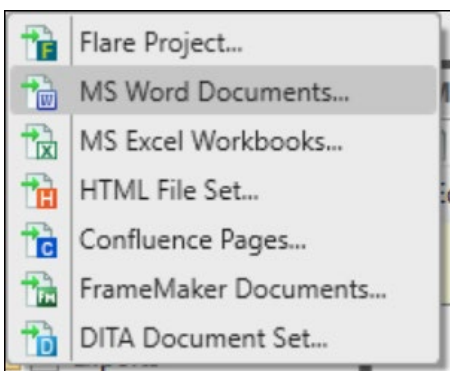
Inserting a Word Document

Here is a copy of the table of contents for the document we're going to import into our help project. We can use this to create our Table of Contents after importing our document into the Flare project.

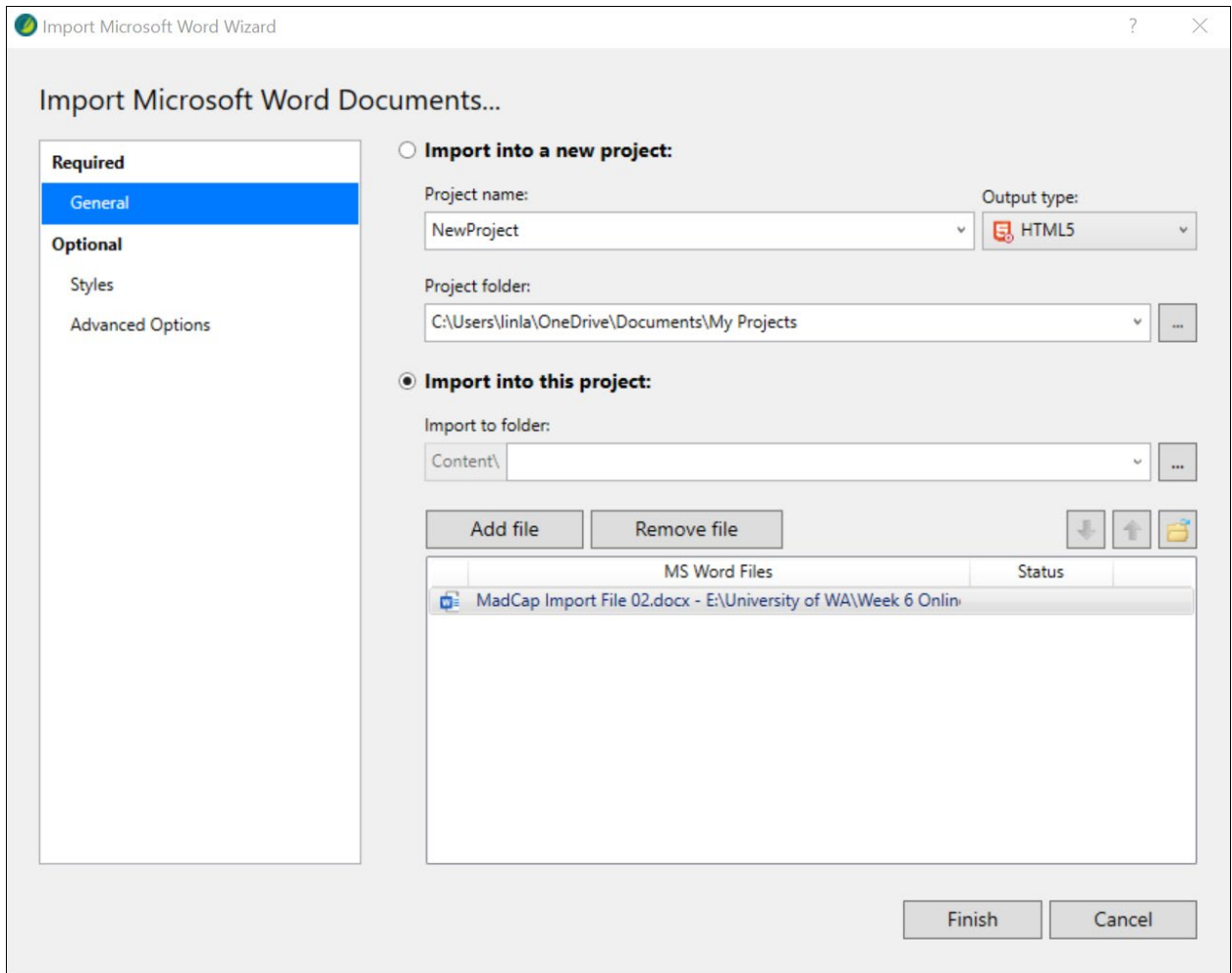
Table of Contents

The What and Why of Email Marketing.....	2
What is Email Marketing?	2
Why Email Marketing?.....	2
What Is Inbound Marketing?	3
The Lead to Prospect to Convert to Nurture Process	4
Getting Leads	5
Tips for Finding Leads.....	5
Other Ways to Attract Leads.....	6
What is an Email Marketing Campaign Exactly?	6
For Products	7
For Newsletters	8
Creating a Marketing Strategy	8
From Problem to Opportunity	9
Exercise: What Problem Does One Product Create That You Can Solve?	10
Generating a Landing Page	10
Exercise: Who is Your Biggest Competitor?	11
Why Are You Different and Better for Your Target Customer?	11
Exercise: What Makes You the Better or Different Choice?.....	12
What Does Your Marketing Strategy Statement Look Like?	12
Open Rates.....	12

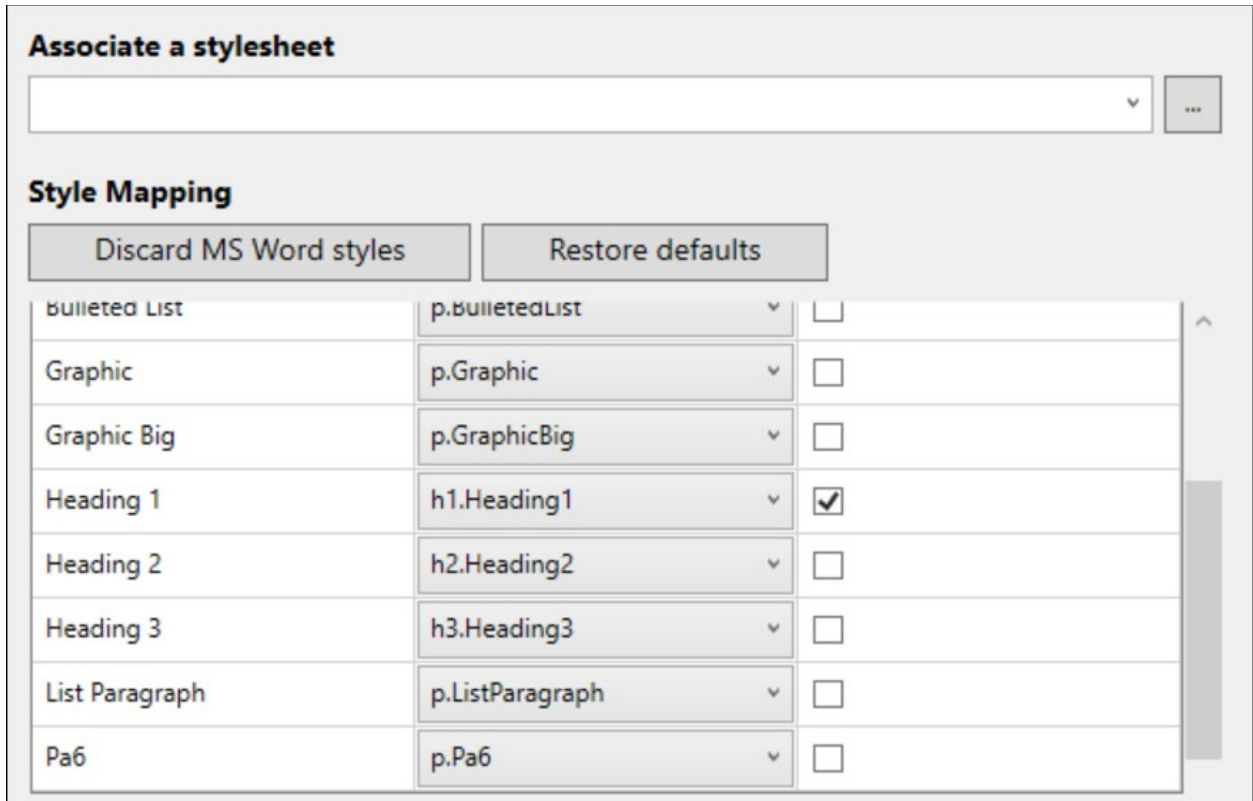
1. From the Project ribbon, select Import > MS Word Documents.



2. Select the Import into this project option, and then with the General option selected, click Add to locate the file you want to import (MadCap Import File 02.docx)



3. Under Optional settings in the left pane, select Styles.

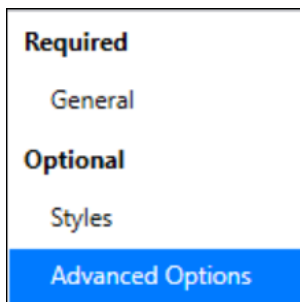


In this section, you can decide how many levels you want to use (Word Heading Styles) to break your content into topics. In this content, there are exercises that are Heading 2s. These probably should be associated with their nearest Heading 2s so I will select Heading 1 and Heading 2 Word Styles for my slicing and dicing as I like to call it.

By default, all the Word styles will be changed to Madcap styles once they are imported unless you don't want that to happen.

Notice that you can also associate a .css style sheet here if you had one to use. We don't have one for this project.

4. Select any Word style and it will show how it will appear in MadCap Flare.
5. Select the Advanced Options from the left pane.



6. Make sure your options are selected as shown below:

Styles ⓘ

Create new stylesheet

Convert inline formatting to CSS styles ▾

Topics ⓘ

Automatically set topic title

Avoid empty topics threshold: 50 ▾ characters

Split long topics threshold: 10000 ▾ characters

Add continued links

(continued in {title}) ▾ Edit...

Add continued from links

(continued from {title}) ▾ Edit...

Approximate filename length: 50 ▲▼ characters

Tables ⓘ

Convert all tables to "auto-fit to contents"

Set first row of each table as a header row

Create CSS table styles in regular stylesheet ▾

Lists ⓘ

Use standard list style type

Equations ⓘ

Convert equations to MathML

Page Layouts ⓘ

Create a page layout for each section header/footer

Page Breaks ⓘ

Preserve and create new topics on page breaks

Reimport ⓘ

Link generated files to source files

Auto-reimport before generate output

7. Click Finish to import your Word document.
8. You can review the imported files, and then click OK.

Reviewing Your Results from the Import

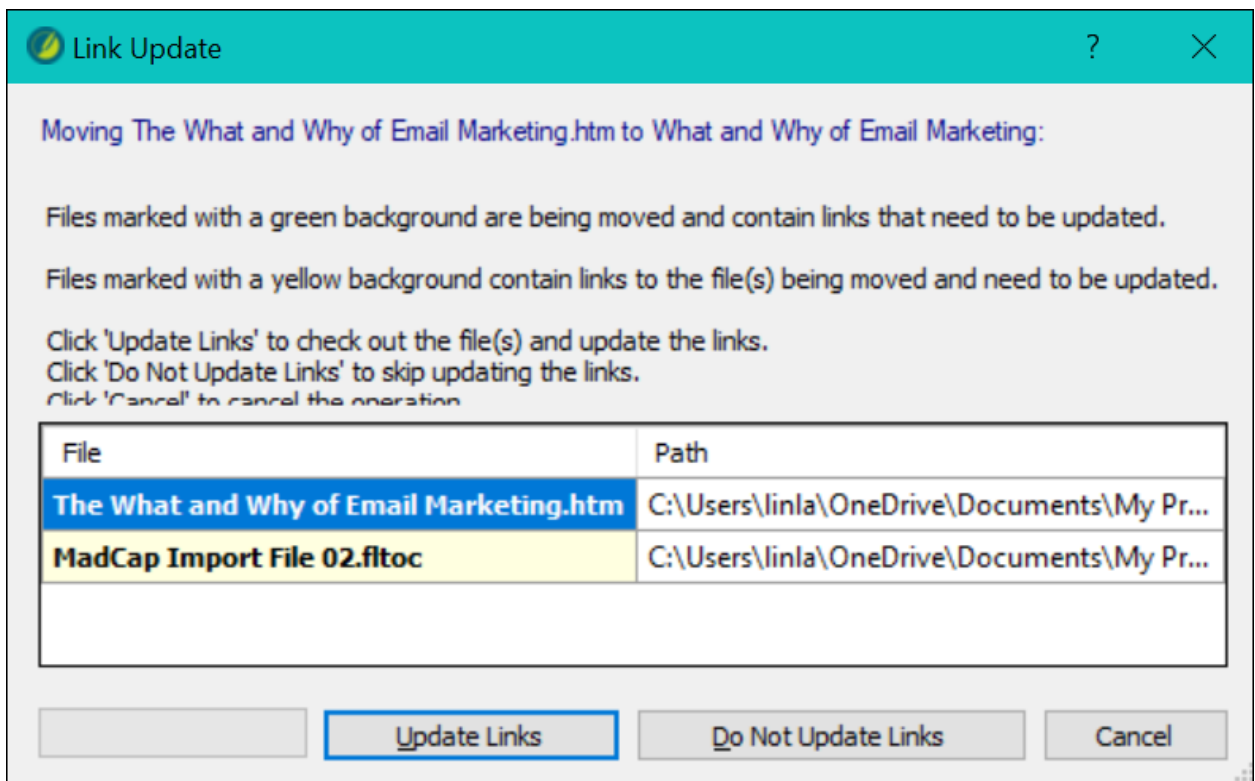
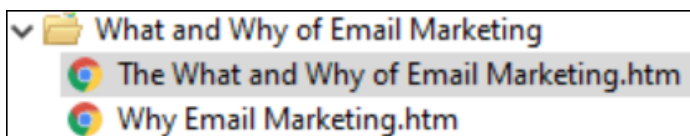
After you import your topic, you should review your results. You might find you need to import it several times before you like the results. The objective should be to do more on the front end of the import so that you don't have to fix individual topics after importing.

To View Import Results

1. Open the Contents Explorer pane and notice that the files appear without being part of a folder.
2. Create folders for each of the sections to match the Table of Contents image at the beginning of this section, and as you drag and drop each htm page, click Update Links.

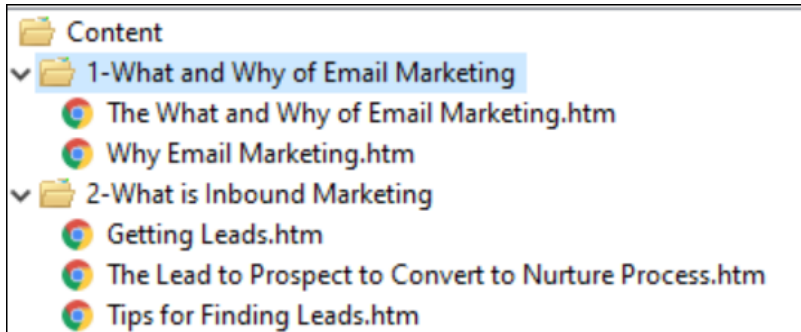
The What and Why of Email Marketing.....
What is Email Marketing?
Why Email Marketing?

This is the first section. Match this to the Content Explorer as shown below:



3. Do that for each section of the Table of Contents above until they all match it. To control the order of the folders as they display in Flare, you can use the system they used with their

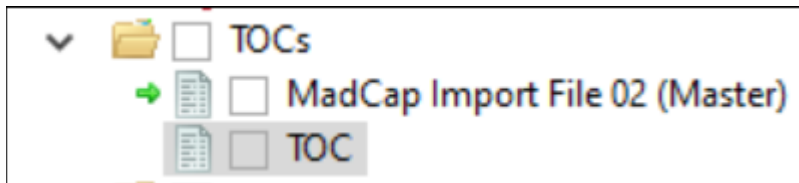
default content, by prefacing the names of each folder with A, B, C, etc. Or you can use numbers.



Why would you do this? Because it helps you locate your topics easily and they will resemble the order of your table of contents.

Creating a Table of Contents

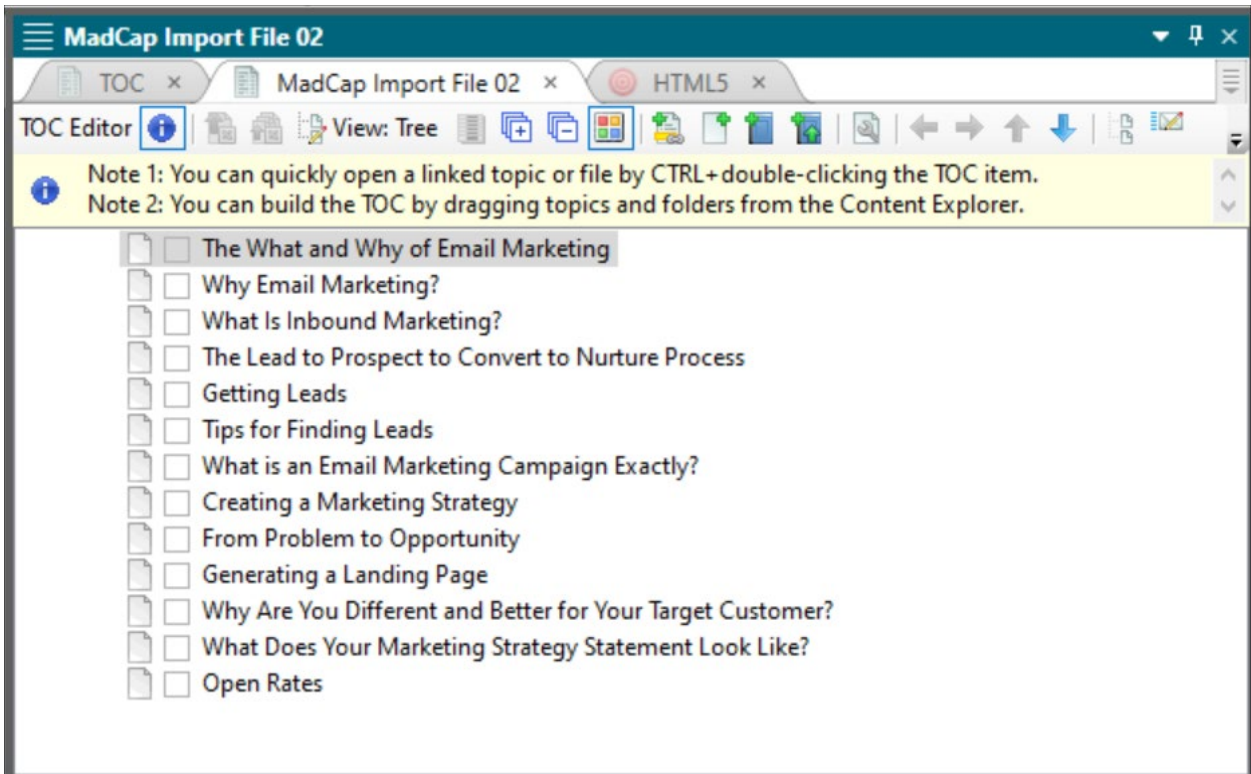
When you import your Word document into Flare, it automatically sets it up with a default table of contents and gives it the name of your imported file.



The default TOC contains the FAQs, Features, and other topics that we worked on earlier. You can combine them into one if you like using both. For now, we'll work on the MadCap Import... file's table of contents.

To Create a Table of Contents

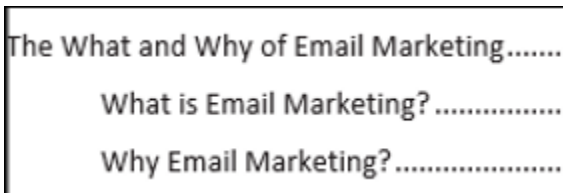
1. Select the MadCap TOC file to open it from the Project Organizer.
2. Using the Table of Contents image in an earlier topic, drag and drop topics in the TOC Editor to resemble your paper version.



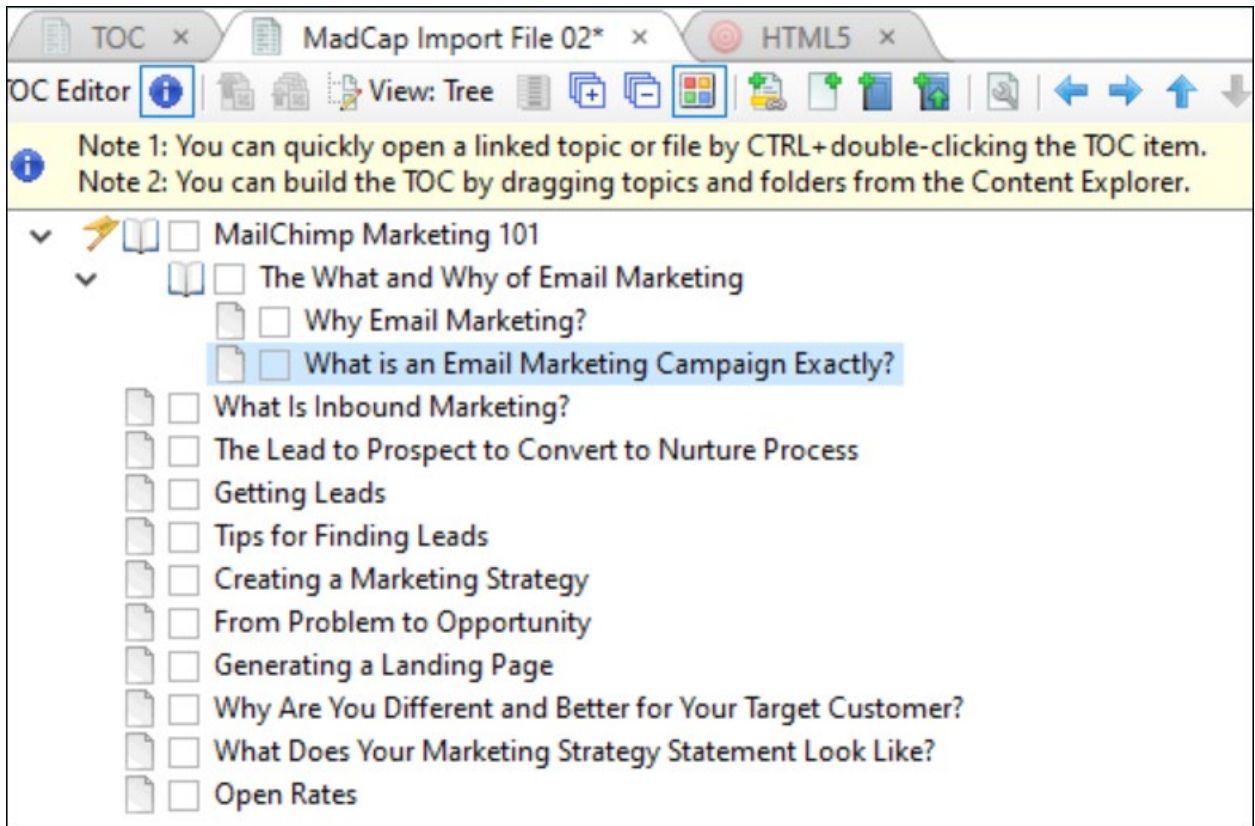
3. Create a new book, by clicking the  icon, and name it MailChimp Marketing 101.



4. Using this first section, start to drag topics below the book, into chapters or sections that resemble the order shown below.

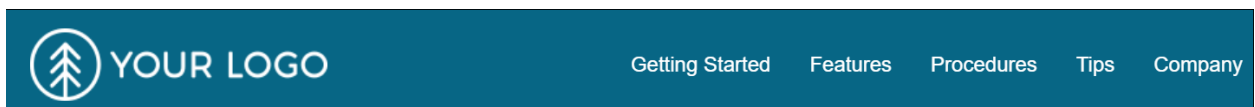


5. You will need to use the arrows to make the topics move to the right or left under the appropriate sections.

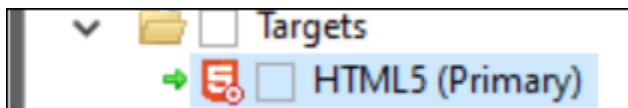


Here's the full TOC again to help you but the topics are in order so you just need to move them right or left to get the structure correct.


6. Continue to work on your table of contents until you've organized your entire toc.
7. Save, generate, and review your project.



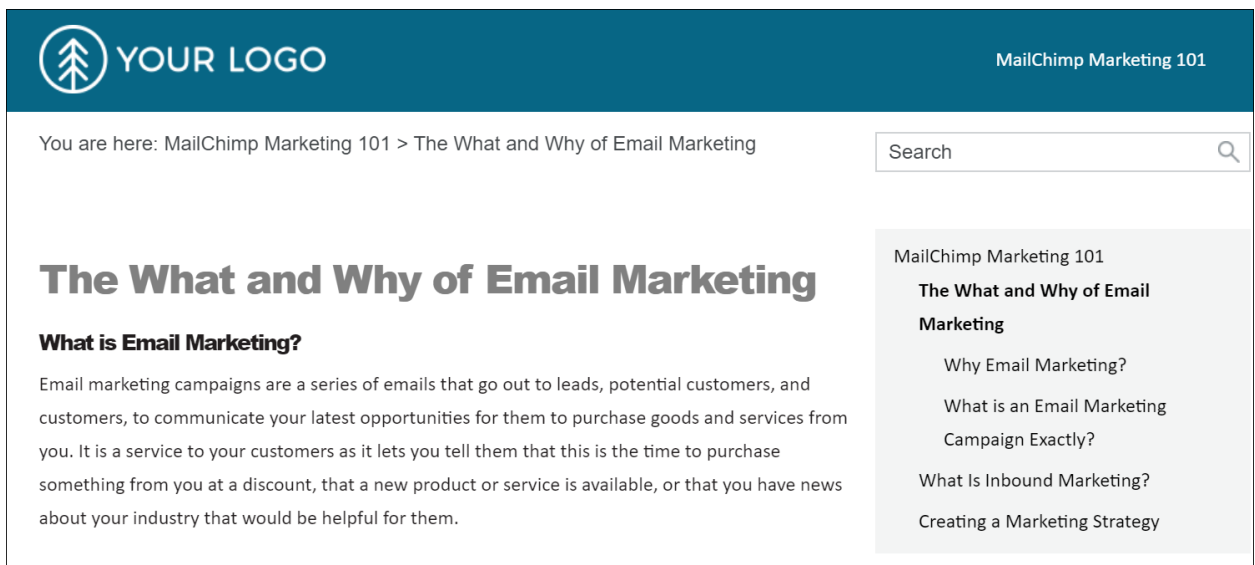
8. If you saw this, why? Go back and select the correct TOC for your project.
9. Open the Targets folder and select HTML5 Primary.



10. Click the drop-down list for Master TOC, and then select MadCap Import File 02.

Output Type:	 HTML5	
Comment:	MadCap HTML5 Target	
Startup Topic:	(default)	...
Master TOC:	TOC	Edit
Browse Sequence:	(default)	Edit
Master Stylesheet:	(default)	Edit

11. Save, generate, and review your project.



The screenshot shows a web page with a dark teal header. On the left, there is a logo with a tree icon and the text 'YOUR LOGO'. On the right, it says 'MailChimp Marketing 101'. Below the header, there is a breadcrumb trail: 'You are here: MailChimp Marketing 101 > The What and Why of Email Marketing'. To the right of the breadcrumb is a search bar with the text 'Search' and a magnifying glass icon. The main content area features the title 'The What and Why of Email Marketing' in a large, bold font. Below the title is a sub-heading 'What is Email Marketing?' followed by a paragraph of text. On the right side, there is a sidebar with the title 'MailChimp Marketing 101' and a sub-heading 'The What and Why of Email Marketing'. Below this, there is a list of links: 'Why Email Marketing?', 'What is an Email Marketing Campaign Exactly?', 'What Is Inbound Marketing?', and 'Creating a Marketing Strategy'.

Here's what it should look like if you're successful.

Tips

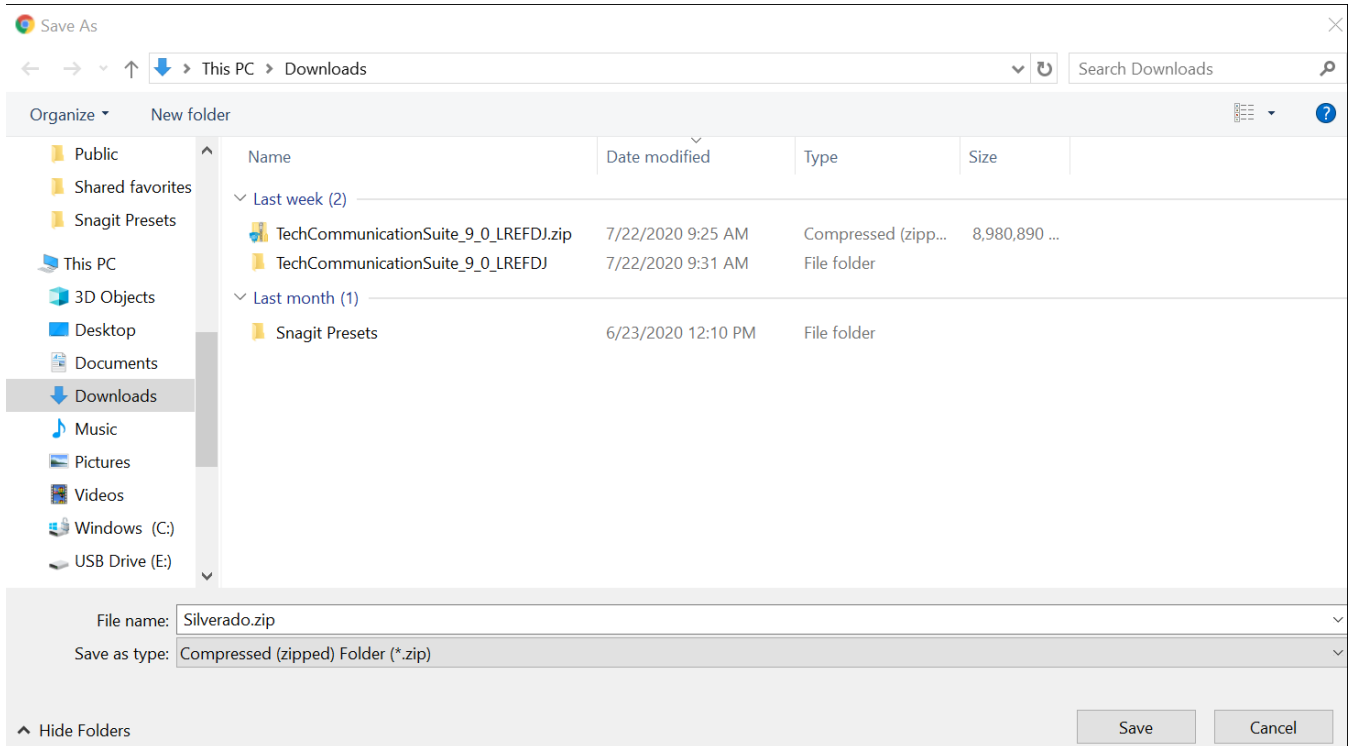
Make small changes and rebuild your project. The smallest change could cause your project to fail and you don't want to have to go back and remember what you did to cause it to do that. Do a small change, rebuild, and then test each change. It may seem tedious, but it will be much less so than trying to find 10 or more changes and fix them back or troubleshooting them.

Changing Help Templates

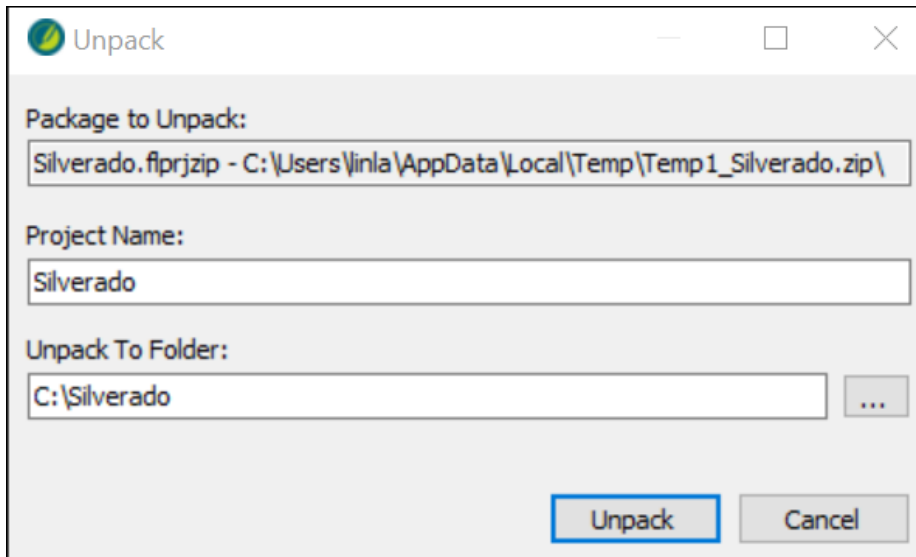
You should do this before you work on your help project.

1. Save your current project and close it.
2. Review the templates on the <https://www.madcapsoftware.com/downloads/madcap-flare-project-templates/>.

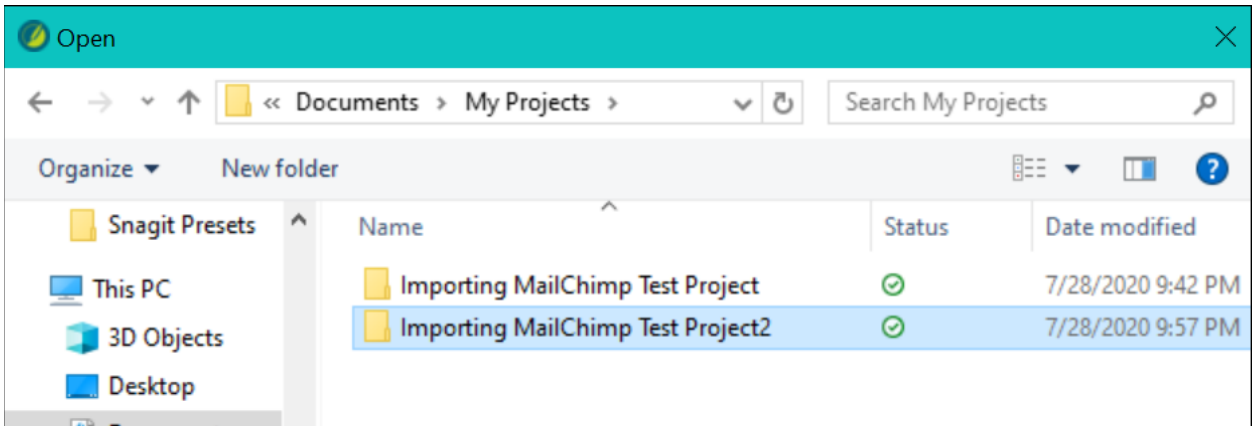
3. When you find the template you want, click download, and then save it to your Downloads folder.



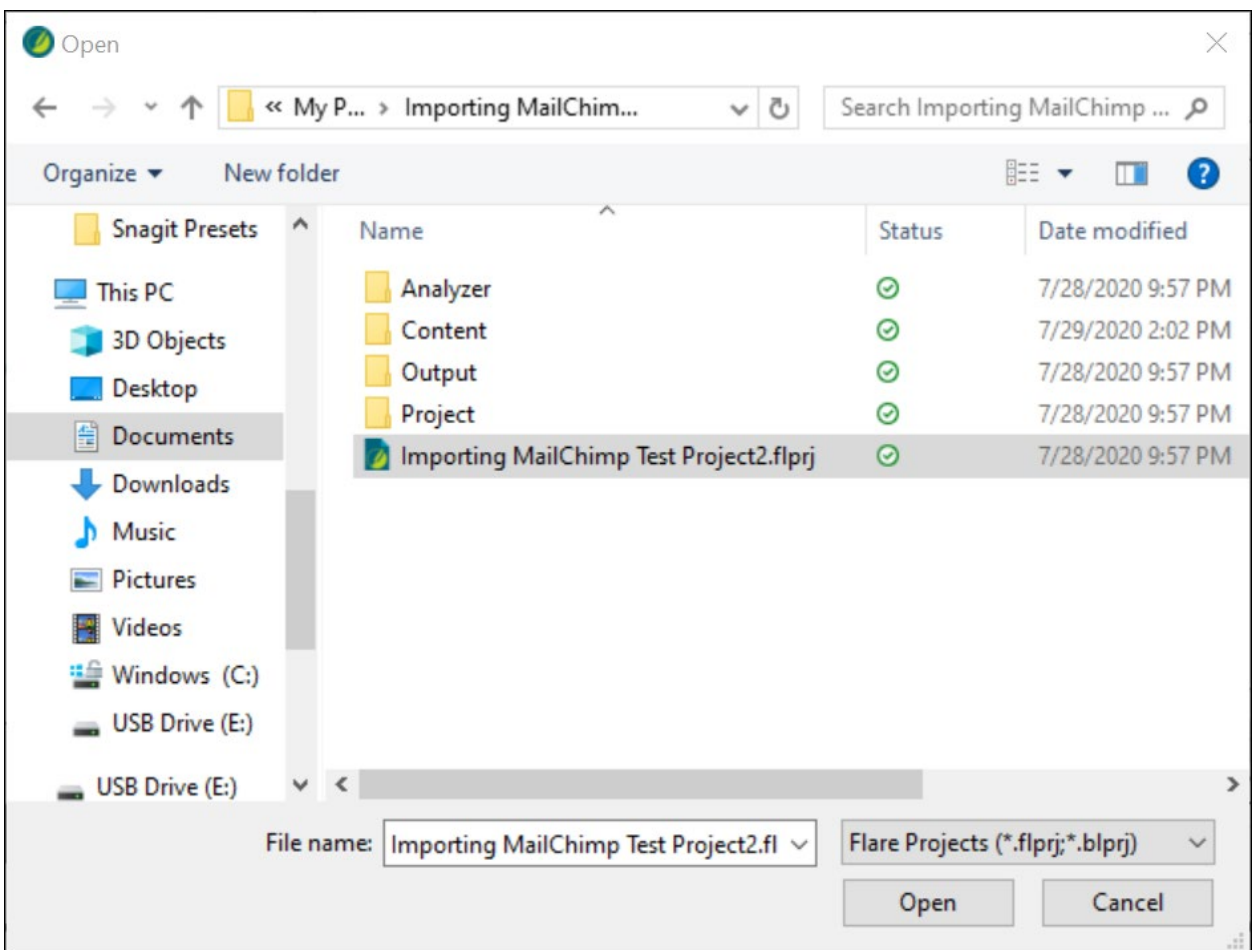
4. Unzip it, and when prompted, enter a location for the files to be unpacked to.



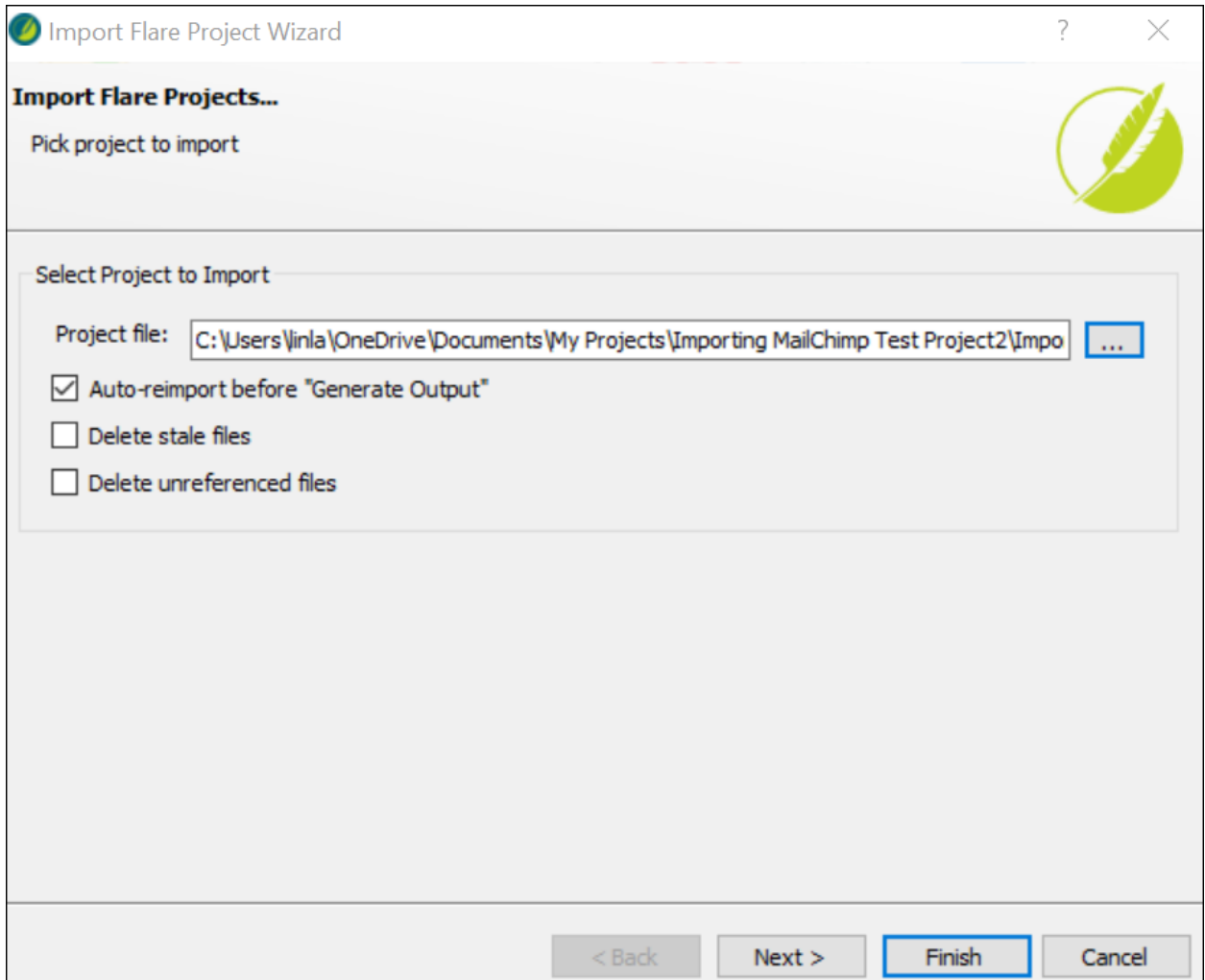
5. Select the Project ribbon and Import > Flare Project, and then locate your project folder.



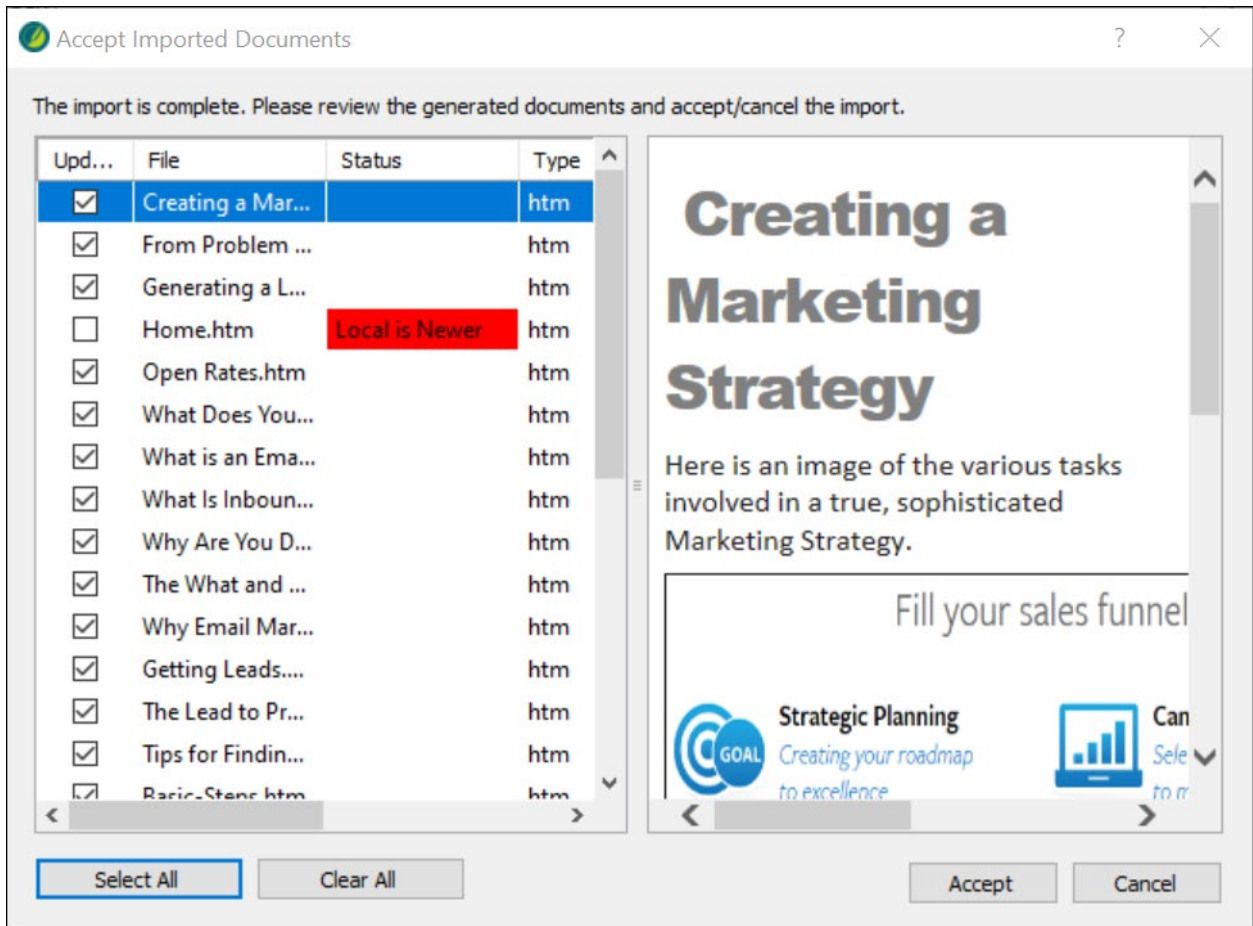
6. Select the .flprj file, and then click Open.



7. Click Finish.

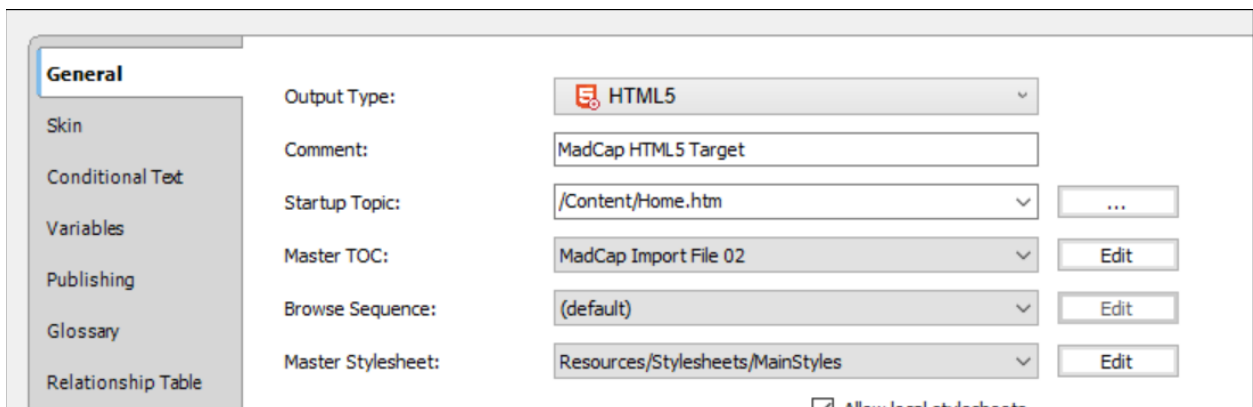


8. When you see the Accepted Imported Documents dialog, accept all.



- Notice that you will need to rebuild your table of contents.

I found my original TOC in C:\Users\linla\OneDrive\Documents\My Projects\Importing MailChimp Test Project2\Project\TOCs and I moved it to my new project folder but this could be tricky. Here's where I moved it to: C:\Silverado\Silverado\Project\TOCs and then I went into the Target > HTML5 – Top Navigation (Primary) options and changed the Master TOC file to the one I created in my earlier project.



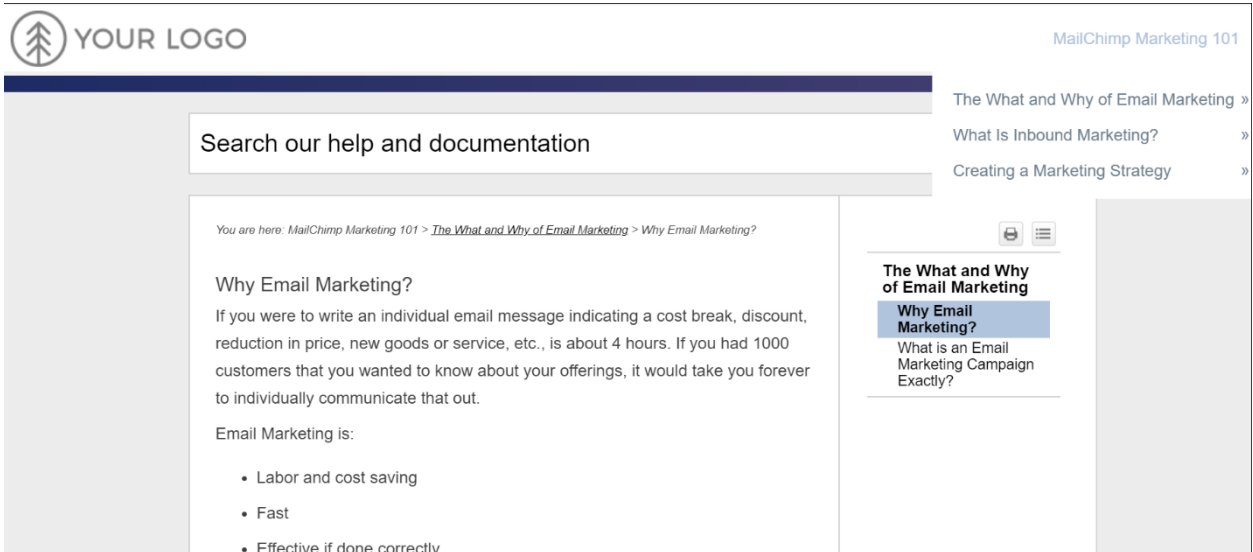
- Save, Generate, and Review your project with the new template attached.

NEED HELP?

Browse our **Most Popular** topics:

- [FAQs](#)
- [PDF DOWNLOADS](#)
- [TIPS](#)

I know it worked because I can see MailChimp Marketing 101 in the upper-right corner of the screen. Here is more evidence that the project was imported correctly.



The screenshot shows a help page layout. At the top left is the logo 'YOUR LOGO'. At the top right is the page title 'MailChimp Marketing 101'. Below the logo is a search bar with the text 'Search our help and documentation'. To the right of the search bar is a list of navigation links: 'The What and Why of Email Marketing »', 'What is Inbound Marketing? »', and 'Creating a Marketing Strategy »'. The main content area is titled 'Why Email Marketing?' and contains a paragraph of text and a bulleted list. The bulleted list includes: 'Labor and cost saving', 'Fast', and 'Effective if done correctly.'. On the right side of the main content area, there is a sidebar with a title 'The What and Why of Email Marketing' and a sub-section 'Why Email Marketing?' which is highlighted in blue. Below this sub-section is the text 'What is an Email Marketing Campaign Exactly?'. There are also print and menu icons in the top right of the sidebar area.