MadCap Software

Print-based Output Guide

Flare 10

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CHAPTER 1

Introduction

You can create print-based output in Flare by generating a target based on one of the following formats: Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML.

You can also follow many of the same steps to create EPUB output that you use to create print-based output types. EPUB is sort of a hybrid format. The output is designed to be viewed electronically; in that way, it is like an online format. On the other hand, its structure is like a book or manual; in that way, it is like a print-based format.

Following are the general steps (some required, most optional) for producing a printed version of your project.

How to Create Print-based Output from Flare

STEP 1

Create/Edit

1. Create Topics
2. Add Optional Elements
   (cross-references, images, text boxes, and more)
3. Make it Look Cool
   (styles, paragraph formatting, lists, and more)
4. Create Page Layouts
   (or master pages)
5. Include Print Topics in Outline TOC
   (specify chapter breaks)

STEP 2

Develop Outputs

- PDF
- XPS
- XHTML
- Word
- FrameMaker
- EPUB*

* Though not technically a print-based format, many of the steps are the same for EPUB

STEP 3

Build Output

- Primary Target
- Single Target
- Batch Targets
- Batches from Command Line

STEP 4

Distribute Output

- Create Destinations
- Send to Printer

The purpose of this guide is not to cover every single aspect of Flare, but rather to focus on the primary features and procedures revolving around the development of print-based output. For information not covered in this guide, please refer to the online Help or one of the other PDF guides (see "PDF Guides" on page 651).

Step 1 — Create and Edit Content

Creating and editing content for print-based output typically consists of the following tasks.

1. **Create Regular Topics** Create topics as you normally would. Some of the content in your topics might be used for both print-based and online output, some might be used only for print output, and some might be used only for online output. In a later step in this process, you'll use condition tags to separate which content is used for which type of output. In this step, create your normal topics and enter content in them, regardless of whether they are to be used for print, online, or both. See "Creating Topics" on page 15.

   In addition to the regular topics that make up your chapter content, you can create special topics with a proxy (placeholder) for displaying generated content. These special topics are often used for your manual's front matter and back matter. The most common type of generated content is a table of contents. Other kinds of output for which you can create topics include indexes, glossaries, endnotes, lists of elements, and lists of concepts.

   - **(Optional) Topic for a Print TOC** If you want your print-based output to include a table of contents (TOC), create a topic specifically for this purpose and insert a TOC proxy into it. Please note that you do not create the TOC itself in your project. Instead, the TOC is automatically generated in the output based on the heading styles that you apply to the content in your topics, or it can be based on the structure or your outline. See "Creating a TOC Manually for Print" on page 200.
   - **(Optional) Topic for a Print Index** If you want your print-based output to include the index from your Flare project, create a topic specifically for this purpose and insert an index proxy into it. See "Creating an Index Manually for Print" on page 143.
   - **(Optional) Topic for a Print Glossary** If you want your print-based output to include the glossary from your Flare project, create a topic specifically for this purpose and insert a glossary proxy into it. See "Creating a Glossary Manually for Print" on page 85.
   - **(Optional) Topic for Collection of Endnotes** If you have inserted footnotes throughout your project and want the print-based output to display all of them in one location (as opposed to, say, the bottom of each page), create a topic specifically for this purpose and insert an endnotes proxy into it. See "Creating an Endnotes Proxy" on page 62.
   - **(Optional) Topic for a List of Elements** If you want your print-based output to include a list of certain elements that you have inserted in the project (e.g., images, tables), create a topic specifically for this purpose and insert a list-of proxy into it. See "Creating a List of Elements" on page 165.
   - **(Optional) Topic for a List of Concepts** If you want your print-based output to include a list of the concepts that you have inserted in the project, create a topic specifically for this purpose and insert a concepts proxy into it. See "Creating a List of Concepts" on page 163.

> **Note:** Options in the Advanced tab of print-based targets let you automatically inject glossary, index, and TOC proxies into output. This means you do not need to create unique topics and insert proxies into them manually. The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method. See "Tables of Contents" on page 185, "Auto-generating Glossaries for Print" on page 71, and "Auto-generating Indexes for Print" on page 129.

2. **Add Optional Elements** In addition to topics (which are required), there are many optional elements that you can add to your project to suit your needs, such as condition tags, images, tables, snippets, variables, index markers, cross-references, text boxes, and footnotes. For a thorough list, see "Adding Stuff to Projects" on page 29.
3. **Make It Look Good** For a thorough list of formatting tasks and features, see "Making It Look Good" on page 227.
4. **Create Page Layouts (or Master Pages)** You can use page layouts and master pages to configure pages for print output (e.g., page size, orientation, headers, footers, page numbers). Page layouts allow for easy configuration through the use of content frames, a snap-to grid, dragging and dropping, alignment features, and more. Although they are similar to master pages, page layouts are more flexible and easier to use. Master pages, however, will continue to be available in Flare for users who have implemented them into past projects; plus, master pages are still useful for online output. The general rule is that page layouts are best for *print-based output* (when possible), and master pages are best for automatically adding headers and footers in multiple topics for *online output*. Neither master pages nor page layouts are used in EPUB targets. See "Page Layouts or Master Pages" on page 335.
5. **Include Print Topics in "Outline Table of Contents"** You need to make sure that all of the topics for your print-based output are added to an "outline table of contents" (TOC). The outline TOC is used to determine which topics from the project are to be included in a particular manual (i.e., target), as well as their sequence in the output. See "Creating an Outline TOC" on page 533 and "Including Print Topics in an Outline TOC" on page 539.

   In addition, an outline TOC is also used for specifying chapter breaks, section breaks, and autonumbering flow in output.

Step 2 — Develop Outputs

Before generating your output, you need to develop a target and associate it with the format that you want to use. See "Determining the Output Type" on page 571 and "Editing Target Settings" on page 579.

Step 3 — Build Output

Now you need to generate the appropriate print target. See "Building Output" on page 617.

Step 4 — Distribute Output

The final step is to distribute the output. See "Distributing Output" on page 637.

CHAPTER 2

Creating Topics

After you create a Flare project, topics are generally the best place to start developing print-based output.

This chapter discusses the following:

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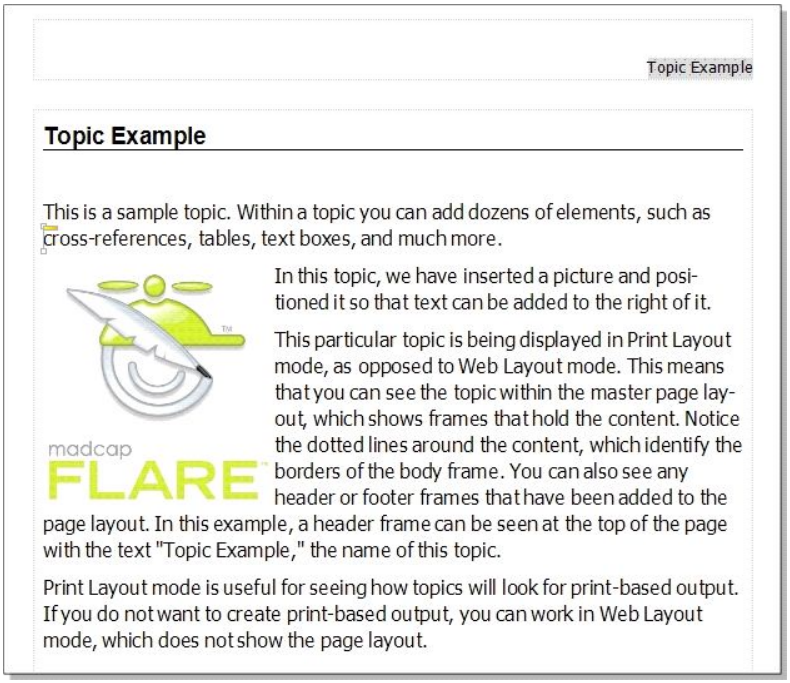
About Topics

A topic is simply a chunk of information about a particular subject. Topics are the most important part of a Flare project. Everything else is contained within topics (e.g., cross-references, text, images) or points toward topics (e.g., tables of contents, indexes, browse sequences). The very reason end users open a Help system or manual is to find information, a little direction. They find that help within individual topics. At this moment, you are reading a topic (called "Topics") that was created in Flare and converted to PDF output.



Separate Files for Topic-based Authoring

Each topic is a separate XHTML file with an .htm extension. This enables you to take advantage of topic-based authoring. In other words, rather than creating a few very long documents (as you might do when working in a program such as Adobe FrameMaker or Microsoft Word), you create many small documents and then piece those separate files together to produce various outputs.

Individual topic files are stored in the Content Explorer, either at the root level or in custom folders that you create.

In your Flare project folder (you specified the location for the folder on your computer when you created the project), the topic files are stored in a subfolder called "Content."

Size of topics

How big should a topic be?

For online output, topics are like pages on a well-designed website. They should not be too long, but should be long enough to provide useful information. There is no specific rule for determining how long to make your topics. It is mostly a matter of common sense. When you are developing a topic, ask yourself if it is something that you would find useful and easy to read.

If you have a topic that seems to be getting a little long, you can break the topic into smaller topics and provide hyperlinks from one topic to another. Another solution is to use Flare's DHTML features (drop-down text and expanding text) to collapse areas of text until end users click a hotspot to open the hidden text.

When it comes to creating print-based output from Flare, these small topics can be strung together in the output to form larger chapters. It is recommended that you try to use small topics when working in Flare—usually no more than a few pages in output. Although you can certainly create a very long topic that holds all of the content for an entire chapter or manual, smaller topics allow you to take full advantage of Flare's many powerful single-sourcing features. For example, with small topics, you can reuse them when generating many different outputs, all from the same project. You might want to use some topics in some outputs, but not in others. With large documents, that is very difficult, if not impossible to do. In addition, small topics are much easier to send out to others for review.

Topic Content

After you create a topic, you can add to it almost anything you want—text, tables, formatting styles, cross-references, images, multimedia, etc. It all depends on the needs of your audience. A topic can contain simple text, or it can contain a combination of many elements. A topic does not even need to contain much text at all; for example, you could simply use a topic to hold a Flash-based movie or a few lines of text for the title page in print-based output. You are only limited by what you can do with XML.

If you are not familiar with XML, that's okay. You can use the easy XML Editor interface to edit topics in Flare, working much like you would in a program such as Microsoft Word. Flare creates the XML tags behind the scenes for you.

Getting Behind the Scenes

Although Flare provides you with a user interface to work on topics (i.e., the XML Editor), you can get behind the scenes to see and edit the code for the topic. The easiest way to do this is to open the topic in the Internal Text Editor in Flare. To do this, open the topic as usual, then at the bottom of the XML Editor, click the **Text Editor** tab. You can also use split the editor between the XML Editor and the Internal Text Editor.

You can also open topics in other third-party tools. One way to do this is to open the topic in Flare. Then click the **Send To** button in the Standard toolbar and select another editor.

Special Topics

In addition to the regular topics that make up your chapter content, you can create special topics with a proxy (placeholder) for displaying generated content. These special topics are often used for your manual's front matter and back matter. The most common type of generated content is a table of contents. Other kinds of output for which you can create topics include indexes, glossaries, endnotes, lists of elements, and lists of concepts.

Creating Topics

Use the following steps to create a new topic using the Add File dialog.

HOW TO CREATE A NEW TOPIC

1. Do one of the following, depending on the part of the user interface you are using:
   - **(Recommended) Right-Click** In the Content Explorer, right-click on a folder and from the context menu select **Add Topic**.

     > **Tip:** When adding a new file to the Content Explorer, the recommended method is to right-click on the folder in the Content Explorer and use the New menu option. This is the most efficient way to direct the new file to the folder where you want to store it. That's because the Add File dialog opens when you add a new content file, and this method ensures that the folder you want is already selected in that dialog.

   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Topic**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.

   - **Menu** Select **Project>Add Topic**.
   - **Standard Toolbar** Click Add Topic...
   - **Local Toolbar** In the local toolbar of the Content Explorer click .
   - **Keyboard Shortcut** Press **CTRL+T**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Topic** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a

template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

> **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

- **New from existing** This lets you 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 the browse button ..., use the Open File dialog to find a file, and double-click it.

About the factory templates available:

- **NewTopic.htm** This creates a regular topic with default text that you can replace. This is the template that you will select most of the time.
- **TopicForEndnotes.htm** This creates a topic with an endnotes proxy, which can be used to generate a list of all your end notes (footnotes) when you build print-based output.
- **TopicForGlossary.htm** This creates a topic with a glossary proxy, which can be used to generate a list of all your glossary terms and definitions when you build print-based output.
- **TopicForIndex.htm** This creates a topic with an index proxy, which can be used to generate an index when you build print-based output.
- **TopicForListOfConcepts.htm** This creates a topic with a concepts proxy, which can be used to generate a list of all your concept keywords when you build print-based output.
- **TopicForListOfElements.htm** This creates a topic with a list-of proxy, which can be used to generate a list of any kind of element you want when you build print-based output.
- **TopicForListOfImages.htm** This creates a topic with a list-of proxy, which can be used to generate a list of all of your images when you build print-based output.
- **TopicForListOfTables.htm** This creates a topic with a list-of proxy, which can be used to generate a list of all of your tables when you build print-based output.
- **TopicForMiniTOC.htm** This creates a topic with a mini-toc proxy, which can be used to generate a small table of contents when you build online or print-based output.
- **TopicForTOC.htm** This creates a topic with a toc proxy, which can be used to generate a full table of contents when you build print-based output.

4. (Optional) The Folder field is automatically populated with the folder that has focus in the Content Explorer. If you want to place the file into a folder that you previously created in the Content Explorer, 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 topic.

> **Note:** Spaces are allowed in the file name. However, if you are publishing output to a UNIX system, avoiding spaces in the file name is recommended. You can use underscores in place of spaces.

6. (Optional) If you want the heading for the topic to use the same text that you provide for the file name, leave the **1st Heading** field blank. Otherwise, enter the text that you want to use for the heading in the topic.
7. (Optional) In the **Title** field you can give the topic a title for the file. This does not refer to the visual title (or heading) at the top of the topic. Rather, it refers to the properties title for the topic.

   If you leave this field blank, the text from the "1st Heading" field will automatically be used for the title.
8. (Optional) If you want the heading for the topic to use the default <h1> style, leave the **Style** field blank. Otherwise, select a style to apply to the heading in the topic.
9. (Optional) In the **Stylesheet** field select a stylesheet to associate with the new topic. If you do not have a stylesheet in your project, this field remains blank. This field is disabled if you have applied a master stylesheet.
10. Click **Add**. The topic is added to the Content Explorer and opens in its own page in the XML Editor.
11. For regular topics, simply click inside the topic page and start typing text or adding any other elements (e.g., tables, images, cross-references, multimedia) appropriate for the topic. For topics that contain proxies, you should remove any default text so that the topic contains only the header and the proxy (or any additional text that you want to include).

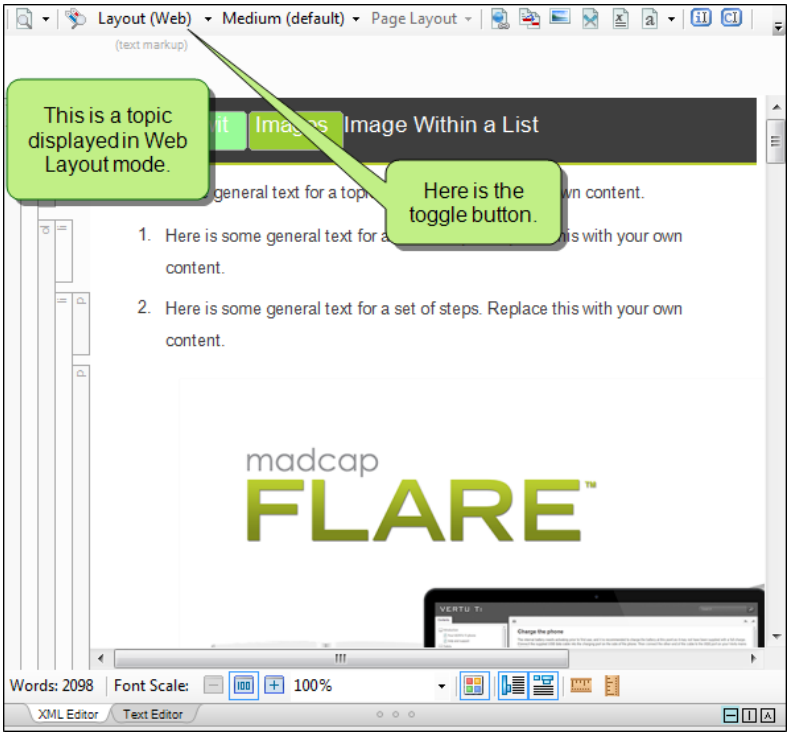
About Layout Modes

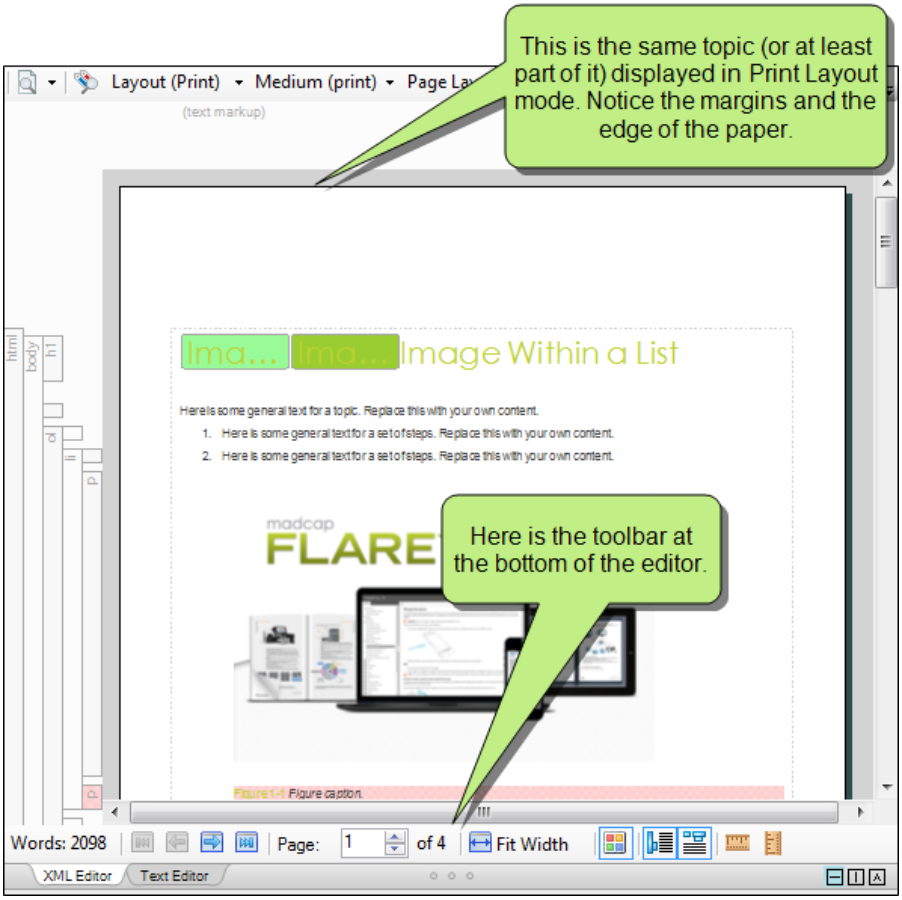
There are two views to choose from in the XML Editor when you edit topics and snippets:

- **Web Layout Mode** This mode is useful for seeing how the topic will look online. It displays your content without showing any headers or footers from a page layout.
- **Print Layout Mode** This mode lets you see how the pages will look with a page layout applied to it. In other words, it lets you see how the page will look when you generate print-based output. This means that you will be able to view the actual page size and orientation, as well as the margins and any header or footer content.

LAYOUT MODES AND STYLE MEDIUMS

You can toggle between the two views in the XML Editor by clicking the **Layout Mode** button:





In addition, you can switch to different style mediums to show the content with the correct styles applied.

The layout mode and the medium that you should use when editing in the XML Editor depends on what you are trying to accomplish. Do you have web output in mind while you are editing, or are you thinking more about print output? Following are some general guidelines, but they may vary depending on the mediums that you might have created and will be using for your different targets.

- **If Editing With Online Output in Mind** For best results, in the local toolbar of the XML Editor, select the **Web Layout** mode and the **default** medium: Layout (Web) Medium (default).
- **If Editing With Print Output in Mind** For best results, in the local toolbar of the XML Editor, select the **Print Layout** mode and the **print** medium: Layout (Print) Medium (print). Also, you can choose a specific page layout and page type within it to better see how a topic might look in print output: Page Layout. For example, if you know you are looking at a topic that will end up being the first page of a new chapter, you can select the Page Layout drop-down, choose the appropriate page layout, and then select **First Right**. Or if you know it will be on a subsequent page of the chapter, you might select **Left** or **Right**.

So if the topic looks kind of crazy when you first open it, that is probably due to the fact that the proper layout mode, page type, and/or medium is not selected in the local toolbar.

When using the Web Layout mode and default medium, the topics should look pretty close in the XML Editor to how they will be displayed in the online output. For the Print Layout mode and print medium, it's a bit of a different story. The main reason is that online output is designed to have many independent pages, whereas print output is intended to be read one page after the other in one long document. Flare has no way of knowing exactly where a particular topic will land in a PDF until you actually generate it. However, by selecting the appropriate layout mode, page layout, and page type, you can get relatively close.

CONDITIONS WHILE EDITING

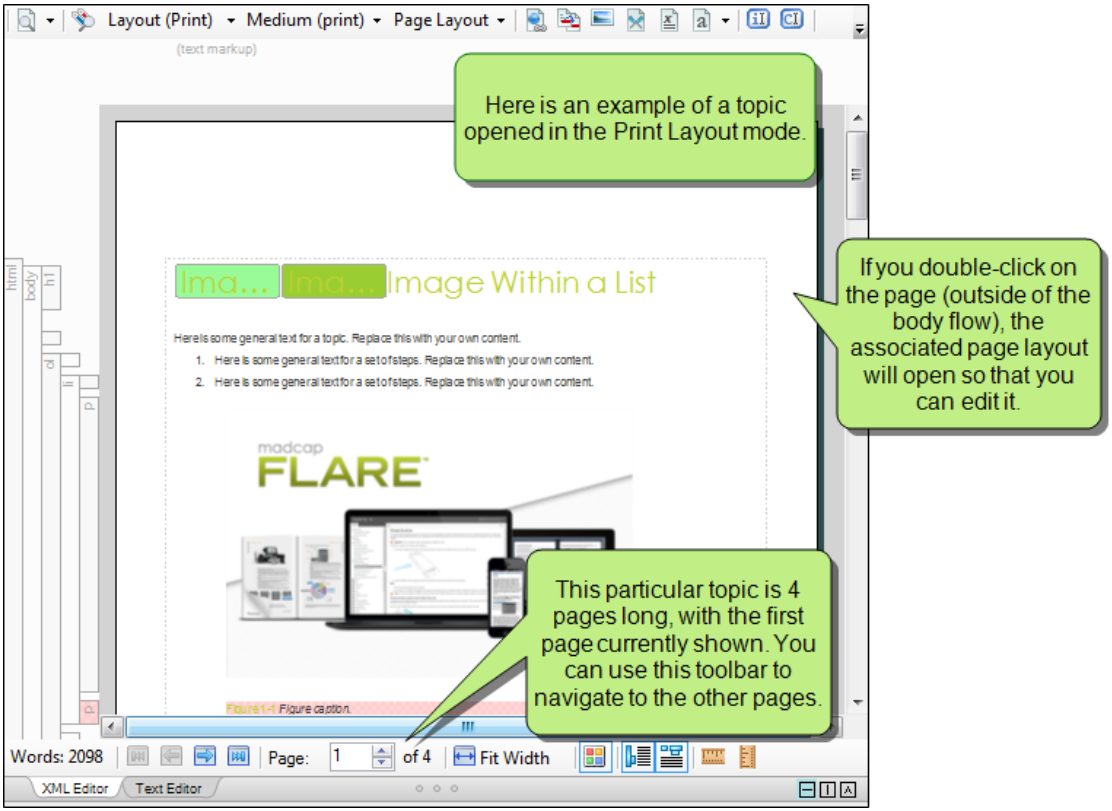
Another way to get closer to how a topic will actually look in the output is to associate condition tags in the topic when you are editing it. This allows you to see only the content that is intended for a particular output that you want to produce. To do this, in the local toolbar of the XML Editor click and in the **Target Expressions** drop-down field, choose one of your targets. The content in the XML Editor changes to include only the conditions for that target. Doing this doesn't affect the output at all. It's simply a way to see how a particular topic will look in a specific output without building or previewing it. You can always repeat these steps to return the topic to its previous state in the XML Editor or to see how it looks with a different target selected. See "Associating Condition Tags to a File While Editing" on page 331.

OPENING PAGE LAYOUTS

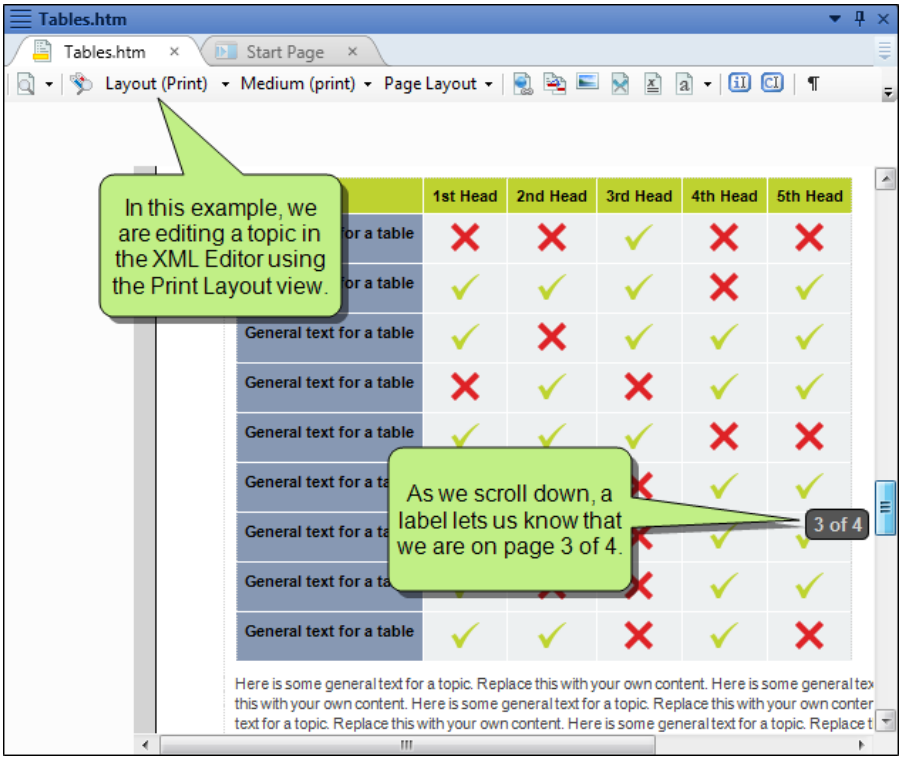
If you double-click on a topic page in Print Layout mode (outside the flow of the main body text), the associated page layout will open in the Page Layout Editor.

PAGES

As you add more and more content to the topic, pages are added below. A navigation toolbar at the bottom of the editor lets you see how many pages are in the topic and quickly navigate to any of them as necessary.



If you are using the Print Layout view in the XML Editor and the topic contains more than one page of content, a label appears beside the scroll bar indicating the current page.



Note: Different operating systems render text differently in the XML Editor. For example, if you are using Microsoft Vista, the text may look a bit smaller than it does in other operating systems. Therefore, if you and another author are looking at the same topic from the same project, but you have different operating systems, the topic may look differently for you than it does for the other person.

Note: If you set a table to a specific height, that height may not be represented accurately if you are viewing the topic in Print Layout mode.

CHAPTER 3

Adding Stuff to Projects

As soon as you start a project, you can do any number of things with it. Technically, you could build the final output immediately. However, if it is a new project, building the output right away would not do your end users much good, since the output does not yet have any real substance. The project needs topics, content, cross-references, navigation, and all of the other "stuff" necessary to help your end users.

This chapter discusses the following:

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What You Can Add to a Project

Following is a list of features that you can create and insert into your Flare project. Creating topics is essential for any project, but otherwise you can pick and choose which of the following to include and which to leave out. Also, it is not necessary that you add these items and features in any particular order.

This guide focuses only on the elements that are particularly important for creating print-based output. Page references are provided next to those features in the following list. For more information about the features not discussed in this guide (i.e., those without page references after them), please refer to the online Help or one of the other PDF guides.

- **Characters and Symbols** You can insert special characters or symbols into content.
- **Condition Tags** Condition tags can be used to tell Flare which content is to be used for online output only and which is to be used for print-based output only. If you need more condition tags than the ones provided by Flare, you can create as many as necessary (see "Condition Tags" on page 326). By applying condition tags to content, you can separate what is intended for print-based output and what is not. That way, content intended for online output does not show up in your printed manuals, and content intended for print is left out of the online Help systems (see "Applying Condition Tags for Printed Output" on page 329). After you apply the condition tags to the appropriate content for print-based output, you'll need to specify in a target (based on one of the print output types) which condition tags to include in the print-based output and which to exclude. See "Associating Condition Tags with Your Print Target" on page 333.
- **Cross-References (and Other Navigation Links)** A navigation link is a feature that points to additional information from a specific area in a topic. The link may open information in the same topic, a different topic, or even a file outside of the project altogether. With print-based output the link can electronically open the destination if the user is viewing the manual online, depending on the type of output you create (e.g., XPS, PDF, XHTML, Word). In addition, cross-reference links can be customized to refer to specific content and page numbers in the printed manual (e.g., See "My Topic" on page 32). In Flare, you can create links such as cross-references, text hyperlinks, text popups, topic popups, image hyperlinks, togglers, and bookmarks. For print-based output, cross-references are especially important and are therefore discussed in this guide. See "Cross-References" on page 34. For information about the other types of navigation links, see the online Help.
- **Equations** Flare supports Mathematical Markup Language (MathML), which is a way to describe mathematical notations in XML. Recommended by the Word Wide Web Consortium (W3C), MathML in Flare allows you to embed virtually any kind of mathematical equation in the XML Editor.
- **External Resource Files** The External Resources window pane lets you select and maintain groups of external files that you want to share among Flare projects. The paths of these files are written to the registry so they will be available for all your Flare projects. External resources can be virtually any local or network files that you have access to (e.g., images, PDF files, Flare project files). From the External Resources window pane, you can easily bring external files into a project (i.e., a copy of the file is added to your Flare project) and keep them synchronized with the source files through mappings. The external resources feature is ideal for shared files that you expect to change over time (e.g., logo images, PDFs, stylesheets), as opposed to, say, a template file that is simply copied into your project and changed only in that project.

- **Footnotes** A footnote is a comment that is used to explain a specific area of the text. It is used primarily for print-based output. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote comment is typically placed at the end of a page where the corresponding number or symbol is placed in the text. Otherwise, you can place a comment later in the manual, such as at the end of a document, chapter, section, or book; in this case, the comment is usually referred to as an endnote. See "Footnotes" on page 56.
- **Glossaries** A glossary is a feature that you can add to your output to help users understand the meaning of individual terms. You can include a glossary in both online and print-based output. To create a generated glossary in print output, you can let Flare auto-generate one for you (faster method), or you can create a unique topic and insert a glossary proxy into it (more powerful and flexible method). See "Glossaries" on page 64, "Auto-generating Glossaries for Print" on page 71, and "Creating a Glossary Manually for Print" on page 85.
- **Horizontal Rules** A rule is a horizontal line (or bar) that you can insert into a topic. You might use a rule, for example, as a design element to separate your topic title from the content.
- **Images** You can insert images into content files (e.g., topics, snippets). Flare supports the following types of raster and vector image files: BMP, EMF, EPS, EXPS, GIF, HDP, JPG, JPEG, PNG, PS, SVG, SWF, TIF, TIFF, WDP, WMF, XAML, XPS. You can resize images through the use of styles or local formatting. Not only can you select a specific image size, but you can also set a maximum or minimum height or width. You can set either the width or height on the image tag and let Flare set the other property automatically, maintaining the aspect ratio (i.e., size proportion of the image. Using this method, you can take advantage of single-sourcing by also using a print medium in the stylesheet. Simply specify one group of settings for the medium used for the online output, and use another group of settings for the medium used for print-based output.

  Tip: For print-based output, you should try to use images with a high DPI (dots per inch) quality (300 is typically recommended). The higher the DPI for an image, the more it shrinks in the output, so you should try to obtain as large as an image as possible to begin with. If that doesn't work, a lower DPI (e.g., 250, 200, 150) may produce acceptable results in print output. By contrast, online output is usually displayed at 72 or 96 DPI, so a lower DPI image is okay for those outputs. To produce the best possible images for both online and print-based outputs, you might consider using different images for those outputs and applying conditions to them. Another option is to use single-sourcing features with MadCap Capture, which lets you accomplish the same thing with only one image for both online and print outputs. See "Creating Single-Source Images" on page 321.

- **Index Markers** You can create an index by inserting index keywords into individual topics. The index is generated automatically in the output when you build a target. To create a generated index in print output, you can let Flare auto-generate one for you (faster method), or you can create a unique topic and insert an index proxy into it (more powerful and flexible method). See "Indexes" on page 90, "Auto-generating Indexes for Print" on page 129, and "Creating an Index Manually for Print" on page 143.
- **Lists of Concepts** You can use a concepts proxy to generate a list of all of the concepts in your output, with links to the corresponding content. See "Inserting Concepts" on page 158.

- **Lists of Elements** You can use the list-of proxy to generate a list of various types of elements (e.g., tables, images) in your output, with links to the corresponding content. This feature can be used to create a list of just about any type of element that you can think of. It does so based on the list-of proxy and whatever styles that you tell it to use. When you generate the output, the list-of proxy is replaced with a list of all paragraphs using the style that you specified. See "Lists of Elements" on page 164.
- **Mini-TOCs** A mini-TOC proxy allows you to generate a portion of your table of contents (TOC) or topic headings at a particular location in the output. A mini-TOC proxy can be used for both online and print-based output. For online output, you can insert a mini-TOC proxy into a master page or a topic. For print-based output formats, you can insert a mini-TOC proxy into any topic where you want to generate a small TOC. For example, let's say you want the first page of each chapter in a manual to start out with a small TOC, showing the page numbers where subheadings occur within that chapter. In that case, you can insert a mini-TOC proxy into each topic that you plan to use as the beginning of each chapter. If you insert the proxy into a master page, each topic using that master page will have a mini-TOC. If you insert the proxy into certain topics only, mini-TOCs will be generated only within those particular topics. See "Mini-TOCs" on page 167.
- **Navigation Links** A navigation link is a feature that points to additional information from a specific area in a topic. The link may open information in the same topic, a different topic, or even a file outside of the project altogether. With print-based output the link can electronically open the destination if the user is viewing the manual online, depending on the type of output you create (e.g., XPS, PDF, XHTML, Word). In addition, cross-reference links can be customized to refer to specific content and page numbers in the printed manual (e.g., See "My Topic" on page 32). In Flare, you can create links such as cross-references, text hyperlinks, text popups, topic popups, image hyperlinks, togglers, named destinations, and bookmarks. See "Cross-References" on page 34.
- **QR Codes** You can insert QR codes into content files (topics, snippets, master pages, page layout content frame) using the XML Editor. A QR code is a type of barcode that can be read by devices such as smart phones. The data encoded in the QR code can be text, a website URL, an email address, contact information, or SMS (Short Message Service, which is used for sending text messages). Basically, QR codes are a way to bridge the gap between a static print document and searchable, more detailed online information at your fingertips. See "QR Codes" on page 180.
- **Snippets** Snippets are pre-set chunks of content that you can use in your project over and over. They are sort of like miniature topics and can be inserted within topics, or even within other topics. In snippets you can insert text, tables, images, and whatever else can be included in a normal topic.
- **Tables** A table in Flare is much like it is in any word processing program, such as Microsoft Word, or in a printed textbook. A table is a group of intersecting columns and rows that you can add to a topic for various purposes, such as comparing different elements.
- **Tables of Contents** For print-based output, a TOC file is actually used an outline, and it's required so that Flare knows which topics you want to include in the output. To create a generated TOC in print output, you can let Flare auto-generate one for you (faster method), or you can create a unique topic and insert a TOC proxy into it (more powerful and flexible method).. See "Tables of Contents" on page 185 and "Creating a TOC Manually for Print" on page 200.

- **Text Boxes** You can insert a box into a topic and add content to it. The text box is separate from the regular text in the topic and can be positioned in a variety of places on a page (e.g., aligned left on the page, outside frame, center of column). You might add a text box, for example, to create an example or case study that runs alongside the main text in a topic, in order to enhance the reader's understanding of the main text.
- **Variables** Variables are pre-set terms that you can use in your project over and over. They are stored in variable sets, which can hold multiple variables. Depending on the template you select when creating a project, Flare may provide you with an initial variable set, but you can add as many additional variable sets as you like. Variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number). There are different kinds of variables: (1) basic ones that you create, (2) custom date/time variables that you create, (3) system variables (e.g., date and time; titles; page count; Chapter, Section, and Volume numbers), (4) Heading variables, and (5) Running Head variables. Some of these are especially useful for page headers and footers in print-based output. See "Variables" on page 209.

Cross-References

This feature is supported in all outputs.

A cross-reference is a navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). This is somewhat similar to a text hyperlink. However, cross-references differ from hyperlinks in a few ways. They are based on format commands that let you automatically refer to specific areas and/or page numbers in the output.

Automating Links Based on Commands

Cross-references let you create automated links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the <MadCap|xref> style. Commands are contained in brackets (e.g., {paratext}).

E X A M P L E

Let's say you have a topic with the title "About Things," and there are several other topics in your project that you want to link to that topic. Furthermore, let's say that each one of those links needs to have the same text (e.g., "For more information see 'About Things.'")

Now, you could use a text hyperlink in each of those topics; this would be a good option if the text in each of the links needed to be different. But instead you create a cross-reference using the <MadCap|xref> style. In this style you specify the exact text mentioned above, along with the {paratext} command, which displays the text of the first paragraph it finds (such as a topic heading). You can use that cross-reference style anywhere that you'd like to create a link using that configuration. When you insert the cross-reference it includes the text you provided (e.g., "For more information see"), and it uses the {paratext} command to display the heading text for the destination topic (e.g., "About Things"). When you put it all together, you have "For more information see 'About Things.'"

Later, if you decide to change the heading text of the destination topic to "About Whatchamacallits," the cross-references will be updated automatically when you generate the output. The new heading will automatically be reflected in all of the links using that cross-reference style (i.e., "For more information see 'About Whatchamacallits'"). If you had used text hyperlinks in a situation like this, you would need to find and replace the text in all of the pertinent links manually.

E X A M P L E

Here is an example of a cross-reference format, using a combination of text and commands:

See {b}"{paratext}"{/b} on page {page}.

A format such as this might be translated in the output as something like this:

See **"Dogs and Cats"** on page 93.

If you are using autonumbers in your content (e.g., for figure or table numbers), you can create cross-reference formats that include the autonumbers. For more, see "Autonumbers" on page 252.

E X A M P L E

Let's say that you have created autonumbers in order to number all of the figures in your project. Perhaps your autonumber format is set up to show the word "Figure" followed by an incremented number and a colon (e.g., Figure 4:, Figure 5:, Figure 6:). In addition, wherever you apply autonumbering in a topic, you might manually type a short description of the image (e.g., Properties Dialog). So in the output under the graphic, the user might see something like this:

Figure 4: Properties Dialog

Now let's say that you want to insert a cross-reference in another topic that points the user to the Figure 4 graphic. To do this, first of all you would probably want to insert a bookmark at that autonumber location so that you can point directly to that paragraph when you insert the cross-reference. Then you can create a special cross-reference format that includes the autonumber portion of that paragraph. The following two autonumber commands can be used:

{paranum} This command displays all of the content in the autonumber format, including any text before an autonumber, the autonumber itself, and any text after the autonumber. Using the example provided above, this command would display something like this in the cross-reference:

Figure 4:

{paranumonly} This command displays any text before an autonumber and the autonumber itself. However, it does not show any text after the autonumber (such as a colon). Using the example provided above, this command would display something like this in the cross-reference:

Figure 4

In addition, if you want to include any text that you manually add in the topic after the autonumber format, you can add the **{paratext}** command to the cross-reference format. Using the example provided above, this command would display something like this in the cross-reference:

Properties Dialog

Therefore, suppose your entire cross-reference format is this:

See "{paranum} {paratext}"

In that case, the output would display something like this:

See "Figure 4: Properties Dialog"

On the other hand, suppose your entire cross-reference format is this:

See "{paranumonly} {paratext}"

In that case, the output would display something like this (without the colon):

See Figure 4 Properties Dialog

Again, when you insert the cross-reference in a topic, make sure you select the format that you created, and also remember to link to the bookmarked paragraph where the autonumber appears.

Tip: If you insert a cross-reference into a topic and it initially does not look the way you expected, try updating the cross-references in the topic. See "Updating Cross-References" on page 55.

Tasks Associated with Cross-References

You can do the following with cross-references.

- **Insert** You can create new <MadCap|xref> styles, add commands, and add the cross-references to topics. See "Inserting Cross-References" on page 39.
- **Create context-sensitive cross-references** For print-based and EPUB output you can create context-sensitive cross-references, which automatically change the text in the link based on the relationship of the cross-reference and the target location. See "Creating Context-Sensitive Cross-References" on page 46.
- **Edit** You can change the style and settings for a cross-reference. See "Editing Cross-References" on page 49.
- **Update** You can refresh your cross-reference links manually so that they display updated information. See "Updating Cross-References" on page 55.
- **Single-source** You can use stylesheet mediums to single-source your cross-reference formats. For example, you can create a cross-reference format that displays as "See 'My Topic'" in some outputs (e.g., online documentation) but as "See 'My Topic' on page 44" in other outputs (e.g., print-based formats). See "Using Single-Sourcing Features" on page 315.

Warning: It is recommended that you avoid creating links to snippets.This is primarily due to the nature of snippets, which are designed to be inserted into multiple files. Let's say you have a heading style in a snippet and that snippet is then inserted into 12 different topics. In another topic, you might decide to create a cross-reference that points to the heading in that snippet. But which of those 12 topics is it supposed to point to in the output? There is no way for Flare to know this, so you could end up with some very undesirable results. For this reason, it's a good idea not to link to any content in a snippet.

Note: You can use the built-in Analyzer and reports to find broken links.

Note: You can generate a report to see places in your project where you might want to create a cross-reference. Essentially, Flare finds files where a hyperlink to a topic exists. Because cross-references are generally preferred over hyperlinks (due to the fact that they are dynamic), it suggests that you create a cross-reference instead.

Inserting Cross-References

The following steps show you how to insert cross-references into topics.

HOW TO INSERT A CROSS-REFERENCE—STANDARD METHOD

1. Open the content file (e.g., topic, snippet).
2. In the XML Editor place your cursor where you want to insert the cross-reference.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Links** section, select **Cross-Reference**.
   - **Menu** Select **Insert>Cross-Reference**.
   - **Keyboard Shortcut** Press **CTRL+SHIFT+R**.
   - **Local Toolbar** In the local toolbar of the XML Editor, click .

   The Insert Cross-Reference dialog opens.
4. From the **Link to** drop-down field, select a way to identify the topic or bookmark to which you want to link. Based on the option you choose, the section below gives you a list of selections or additional fields to complete.

   TOPIC IN PROJECT

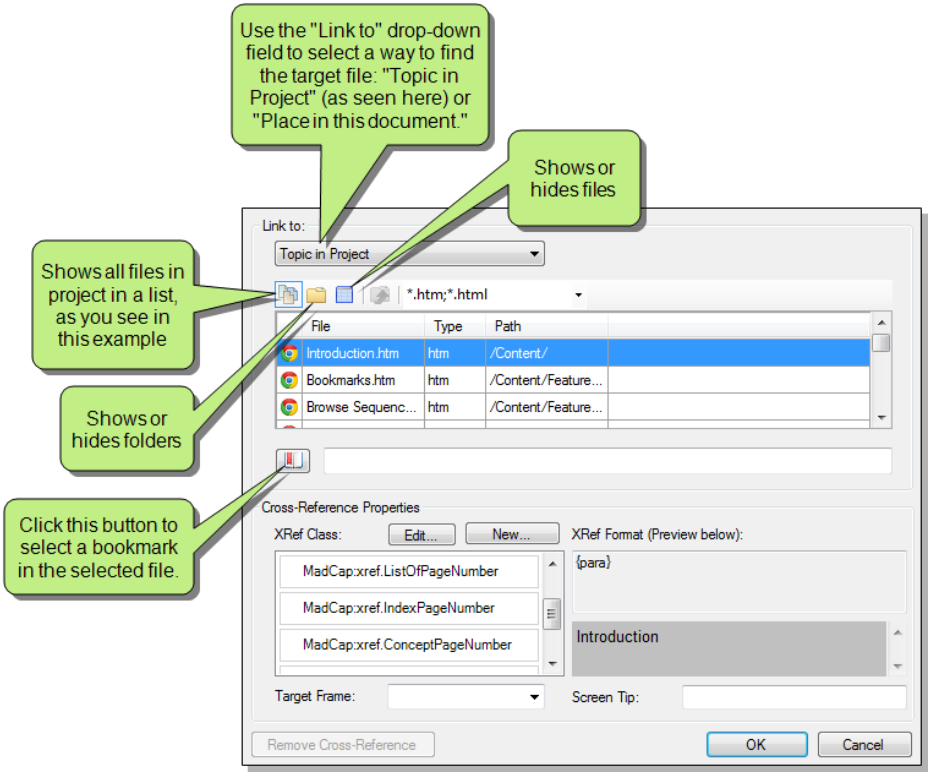
   This option lets you search for a topic within your project. After you select this option, use the area below to navigate to the file that you want to link to and select it. By using the buttons in the local toolbar, you can view all files in a list, view files in their folder structure, and use other options.

	Shows all of the files in the project in a list in the area below. If you click the button again, it switches to a folder tree view. In the list, you can click the File, Type, or Path column headers to sort the list alphabetically by that column data.
	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the Show Folders button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	If the Show Files button is the only one selected, you can click this button to move up one folder level.

   You can also click to display and select any bookmarks within the destination topic.

PLACE IN THIS DOCUMENT

This option displays any headings and bookmarks in the current file. After you click this option, use the section below to choose the heading or bookmark to which you want to link.



5. In the **Cross-Reference Properties** section, select the <MadCap:xref> style that you want to use for the cross-reference.

   Initially, you may see only the parent <MadCap:xref> tag in the list. In the XRef Format area to the right, you can see the current format associated with that tag. By default, it initially is: See "{paratext}." The command {paratext} means that the text of the paragraphed bookmark—or the text of the first paragraph found in the topic—will be displayed at that spot.

You can: (1) use the parent <MadCap:xref> tag with its current format, (2) use the parent <MadCap:xref> tag and change the format to something else, (3) create a new class of the <MadCap:xref> tag and provide a custom format for it, or (4) use a class that you have already created previously.

It is a good idea to create classes because you may eventually want to use multiple kinds of cross-references in your project. Each class that you create can be used to display cross-references in a different format. For more information about using styles, including steps, see the online Help or the Flare *Styles Guide*.

6. If you want to use the parent <MadCap:xref> tag with its current format, or a class that you have created previously, click **MadCap:xref** or the name of the class, respectively. Then continue with Step 13.
7. If you want to use the parent <MadCap:xref> tag but change the format, click **MadCap:xref** and then **Edit**. The Edit Cross-Reference Style Class dialog opens. Continue with Step 10.
8. If you want to create a new class of the parent <MadCap:xref> tag, click **New**. The New Cross-Reference Style Class dialog opens.
9. In the **XRef Class** field, give your new class a name.
10. In the **Stylesheet to modify** field, select the appropriate stylesheet (if different from the one shown). If you are using a master stylesheet (recommended), only that stylesheet is shown in this field. If you are not using a master stylesheet, the stylesheet that you select needs to be applied to the topic in which you are inserting the cross-reference.
11. In the **Enter format** field, provide the format for the style. This format can be a combination of text that you type and automated commands that you select. You can select commands from the list by double-clicking them. They are then added to the "Enter format" field.

Command	Description
b	Start bold text
/b	End bold text
bg	Start new background color
/bg	End background color
color	Start new text color
/color	End text color
default	Reset all font changes
ext	File extension

Command	Description
family	Start new font family
/family	End font family
file	File name, including extension
filename	File name, without extension
h1	Text of first heading 1 paragraph
h2	Text of first heading 2 paragraph
h3	Text of first heading 3 paragraph
h4	Text of first heading 4 paragraph
h5	Text of first heading 5 paragraph
h6	Text of first heading 6 paragraph
i	Start italic text
/i	End italic text
page	Page number
pagecount	Page count
pageref	Context-sensitive page reference
paranum	The autonumber text of bookmarked paragraph.
paranumonly	The autonumber only of bookmarked paragraph
paratext	Text of bookmarked paragraph
paraxml	Text and markup of bookmarked paragraph
path	File path

Command	Description
size	Start new font size
/size	End font size
sub	Start subscript text
/sub	End subscript text
sup	Start superscript text
/sup	End superscript text
title	Title of document
u	Start underlined text
/u	End underlined text
url	File path, URL syntax

E X A M P L E

If you want the cross-reference to include text (such as "For more information see"), simply type it in this field. You can also double-click any of the commands to add them to this field. For example, you might want to add the text of the first paragraph in the destination file to the cross-reference format. The command for this is {paratext}. Descriptions for each command are displayed in the list.

Some commands include a start tag and an end tag. For example, if you want a portion of the cross-reference to be displayed in bold, you would place your cursor in the "Enter format" field where want to start the bold font and double-click **b** in the list below. Then place your cursor where you want the bold font to end and double-click **/b** from the list.

So in the end, your cross-reference format might include a combination of text and multiple commands, such as:

For more information see {b}{paratext}{/b}

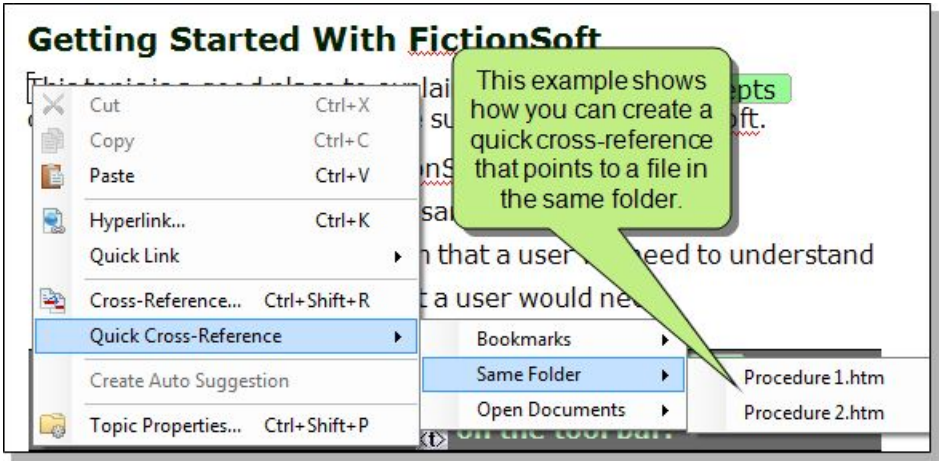
A format such as this one might display a link in the output like this:

For more information see **My Destination Topic**

12. Click **OK**.
13. Click **OK**. The cross-reference is added to the topic. You can change the appearance of the link (e.g., color, underline) by modifying the style (e.g., MadCap|xref or MadCap|xref.MyStyle) in the Stylesheet Editor.
14. Click to save your work.

HOW TO INSERT A CROSS-REFERENCE—QUICK CROSS-REFERENCE METHOD

1. Open the content file (e.g., topic, snippet).
2. In the XML Editor right-click at the location where you want to insert the cross-reference.
3. From the context menu select **Quick Cross-Reference**.
4. Select the appropriate submenu, depending on the option that helps you find the destination the fastest.
   - **Bookmarks** Lets you select any bookmarks that you have already inserted into the current file.
   - **Same Folder** Lets you select any files that are contained in the same folder in the Content Explorer.
   - **Open Documents** Lets you select any other files that are also currently open in the workspace.



5. From the next submenu choose the bookmark or file. The cross-reference is added to the topic. You can change the appearance of the link (e.g., color, underline) by modifying the style (e.g., MadCap|xref or MadCap|xref.MyStyle) in the Stylesheet Editor.
6. Click to save your work.

Creating Context-Sensitive Cross-References

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

For print-based and EPUB output you can create context-sensitive cross-references, which automatically change the text in the link based on the relationship of the cross-reference and the target location.

E X A M P L E

Let's say that you have a cross-reference that is designed to display the text "See Figure 2.1." If the link and the target fall on the same page, the cross-reference is updated to display the text, "See Figure 2.1 above" or "See Figure 2.1 below." If the link and the target are on adjacent pages, the cross-reference is updated to display the text, "See Figure 2.1 on the previous page" or "See Figure 2.1 on the next page." If the document is double-sided with the link on the left page and the target on the right page, the cross-reference is updated to display the text, "See Figure 2.1 on the facing page."

Using context-sensitive cross-references is simply a matter of using the correct command. In other words, instead of using the simple {page} command, you can use the {pageref} command.

E X A M P L E

Let's say you use the plain {page} command. Perhaps the complete format that you create for a cross-reference style is this:

See "{paratext}" on page {page}.

When you generate the output, this cross-reference will be converted to something like the following, regardless of where the link falls in relation to its destination:

See "My Information" on page 42.

However, let's say that you use a slightly different format, something like this:

See "{paratext}" {pageref}.

When you generate the output, what you see in place of {pageref} depends on the relative closeness of the link and the destination. It might be translated as any of the following:

See "My Information" below.

See "My Information" above.

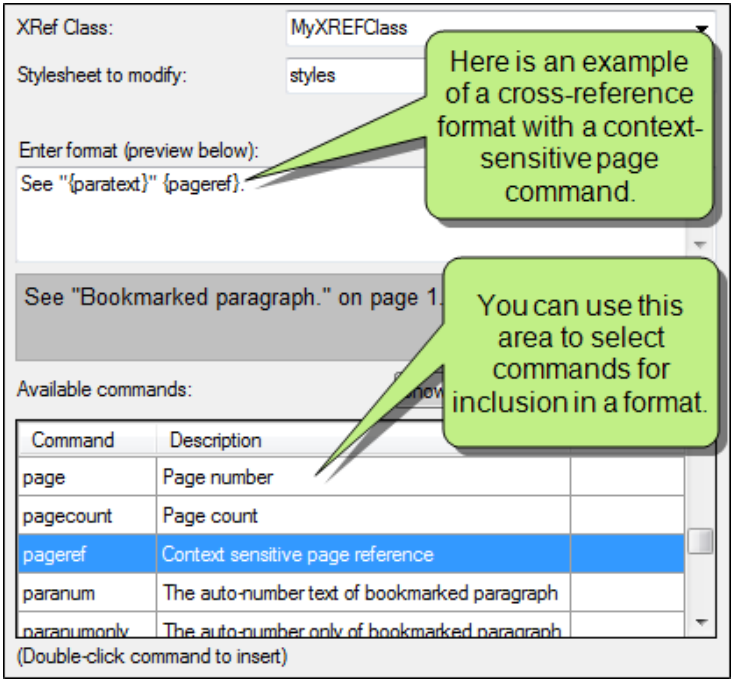
See "My Information" on previous page.

See "My Information" on page 42.

HOW TO CREATE CONTEXT-SENSITIVE CROSS-REFERENCES

1. Go through the process of inserting or editing a cross-reference. See "Inserting Cross-References" on page 39.
2. In the Insert Cross-Reference dialog, select either **New** or **Edit**, depending on whether you want to create a new cross-reference style or edit an existing one.
3. Provide a format in the **Enter format** field. This format can be a combination of text and automated commands.

   When creating this format, make sure you include the {pageref} command in it. You can find the command by selecting either **Show All** or **Show Page Commands**. When you find the {pageref} command in the list, double-click it to add it to the format. Here is an example of a format that contains a context-sensitive cross-reference command: See "{paratext}" {pageref}.



4. Click **OK**.

Editing Cross-References

After you insert cross-references into topics, you can edit them in the following ways.

- **Destination** You can change the file to which the cross-reference is pointing. See "Editing Cross-Reference Destinations" on the next page.
- **Style Format** You can change the style format used for cross-references. For example, instead of "See *My Topic*," you might want cross-references to display "For more information see **My Topic**." See "Editing Cross-Reference Style Formats" on page 52.
- **Context-sensitive Text** You can use language skins to localize the text used in your cross-references. In addition, even if you plan to create output in only one language, you can use a language skin to change the autotext that is displayed for context-sensitive cross-references. For example, instead of the text displaying "on next page," it can be customized to display "on the following page." See "Editing Text for Context-Sensitive Cross-References" on page 54.

Editing Cross-Reference Destinations

After you insert cross-references into topics, you can change the file to which the cross-reference is pointing.

HOW TO EDIT A CROSS-REFERENCE DESTINATION

1. Open the content file (e.g., topic, snippet).
2. In the XML Editor, right-click on the cross-reference and select **Edit Cross-Reference**. The Insert Cross-Reference dialog opens.
3. From the **Link to** drop-down field, select a way to identify the topic or bookmark to which you want to link. Based on the option you choose, the section below gives you a list of selections or additional fields to complete.

   TOPIC IN PROJECT

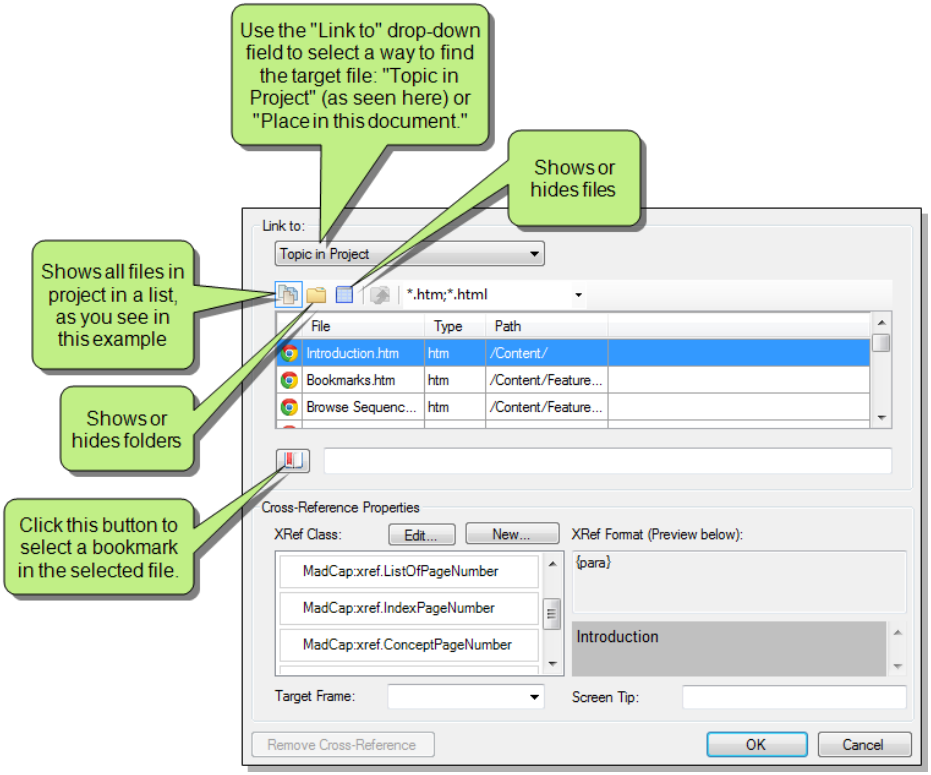
   This option lets you search for a topic within your project. After you select this option, use the area below to navigate to the file that you want to link to and select it. By using the buttons in the local toolbar, you can view all files in a list, view files in their folder structure, and use other options.

	Shows all of the files in the project in a list in the area below. If you click the button again, it switches to a folder tree view. In the list, you can click the File, Type, or Path column headers to sort the list alphabetically by that column data.
	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the Show Folders button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	If the Show Files button is the only one selected, you can click this button to move up one folder level.

   You can also click to display and select any bookmarks within the destination topic.

PLACE IN THIS DOCUMENT

This option displays any headings and bookmarks in the current file. After you click this option, use the section below to choose the heading or bookmark to which you want to link.



4. Click **OK**.
5. Click to save your work.

Editing Cross-Reference Style Formats

You can change the style format used for cross-references. For example, instead of "See *My Topic*," you might want cross-references to display "For more information see **My Topic**."

You can edit cross-reference style formats at the point where a cross-reference is inserted, or from a stylesheet.

HOW TO EDIT A CROSS-REFERENCE STYLE FORMAT AT THE POINT OF INSERTION

1. Open the content file (e.g., topic, snippet).
2. In the XML Editor, click inside the link.
3. At the top of the XML Editor, right-click the span bar representing the link. For example, hyperlink span bars have an "a" label, and cross-reference span bars have a "MadCap:xref" label. When you click on the link in the topic, the appropriate span bar at the top of the XML Editor will change color to indicate that it goes with the link. If your span bars are not turned on, click in the local toolbar of the XML Editor.
4. Select **Edit Cross-Reference**. The Insert Cross-Reference dialog opens.
5. In the **Cross-Reference Properties** section, select the **MadCap:xref** style that you want to edit.

   <MadCap:xref> is the parent tag and default selection, but in the Stylesheet Editor you can create style classes under that tag if you want a variety of looks for cross-references.
6. Click **Edit**. The Edit Cross-Reference Style Class dialog opens.
7. (Optional) In the **Stylesheet to modify** field, you can select the appropriate stylesheet (if different from the one shown). If you are using a master stylesheet (recommended), only that stylesheet is shown in this field. If you are not using a master stylesheet, the stylesheet that you select needs to be applied to the topic in which you are inserting the cross-reference. For more information see the online Help or the Flare *Styles Guide*.
8. In the **Enter format** field, provide the format for the class. This format can be a combination of text that you type and automated commands that you select. You can select commands from the list by double-clicking them. They are then added to the "Enter format" field.
9. Click **OK**.
10. Click to save your work.
11. (Optional) To make sure other cross-references in your project display the new format, you can update the cross-references in a topic (**Tools>Update Cross-References**). However, all of the cross-references in your project will be updated automatically when you generate the output, so this is not a mandatory task.

HOW TO EDIT A CROSS-REFERENCE STYLE FORMAT FROM A STYLESHEET

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Link Styles.
4. On the left side of the Stylesheet Editor, select the **MadCap|xref** tag (or a class of it) that you want to edit.
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Assorted Relevant Properties. The most relevant properties for that style are shown on the right side of the editor.
6. Click in the value column on the right side of the **mc-format** property.
7. In the **Enter format** field, provide the format for the class. This can be a combination of text that you type and automated commands that you select. You can select commands from the list by double-clicking them, adding them to the "Enter format" field.
8. Click **OK**.
9. Click to save your work.
10. (Optional) To make sure cross-references in your project display the new format, you can update the cross-references in a topic (select **Tools>Update Cross-References** in either the ribbon or menu interface). However, all of the cross-references in your project will be updated automatically when you generate the output, so this is not a mandatory task.

Editing Text for Context-Sensitive Cross-References

You can use language skins to localize the text used in your cross-references. In addition, even if you plan to create output in only one language, you can use a language skin to change the autotext that is displayed for context-sensitive cross-references. For example, instead of the text displaying "on next page," it can be customized to display "on the following page." See "Creating Context-Sensitive Cross-References" on page 46.

Flare provides skins for many different languages. If Flare does not provide a skin for a language that you would like to use, you can create a user-defined language skin.

HOW TO EDIT TEXT FOR CONTEXT-SENSITIVE CROSS-REFERENCES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Tools** ribbon. In the **Templates** section select **Manage Language Skins**.
   - **Menu** Select **Tools>Manage Language Skins**.

   The Language Skins dialog opens.
2. From the list, select a language in bold or italic font.
3. Click **Open File For Editing**. If you selected a language in bold, click **OK** in the message that displays. The Language Skin Editor opens.
4. On the left side of the editor, select **Formats**
5. On the right side of the editor, expand the **Cross-Reference** group.
6. Click in any of the cells on the right and change the text as necessary.

   Note: The "Format" and "Format for Print" fields not only contain text, but they also contain format commands in brackets—for example, {paratext} and {page}. For a list of commands that you can use, see "Editing Cross-Reference Style Formats" on page 52.

7. Click to save your work.

Updating Cross-References

If you insert cross-references into topics and then later edit the formats for those cross-references (or make other changes in the project that might affect them), you can update the cross-references in a topic. By updating cross-references, you are essentially refreshing them so that they reflect any pertinent changes in the project since you inserted them.

Updating cross-references is not a mandatory step when it comes to the output. When you generate output for a target, all of your cross-references in the output will be updated automatically. However, the cross-references in the source files in your project will remain as they were. But you can use the following steps to manually update cross-references in a single content file, such as a topic or snippet. This is a way of performing a spot check ahead of time, verifying that cross-references will be updated accurately before you generate the output.

HOW TO UPDATE CROSS-REFERENCES

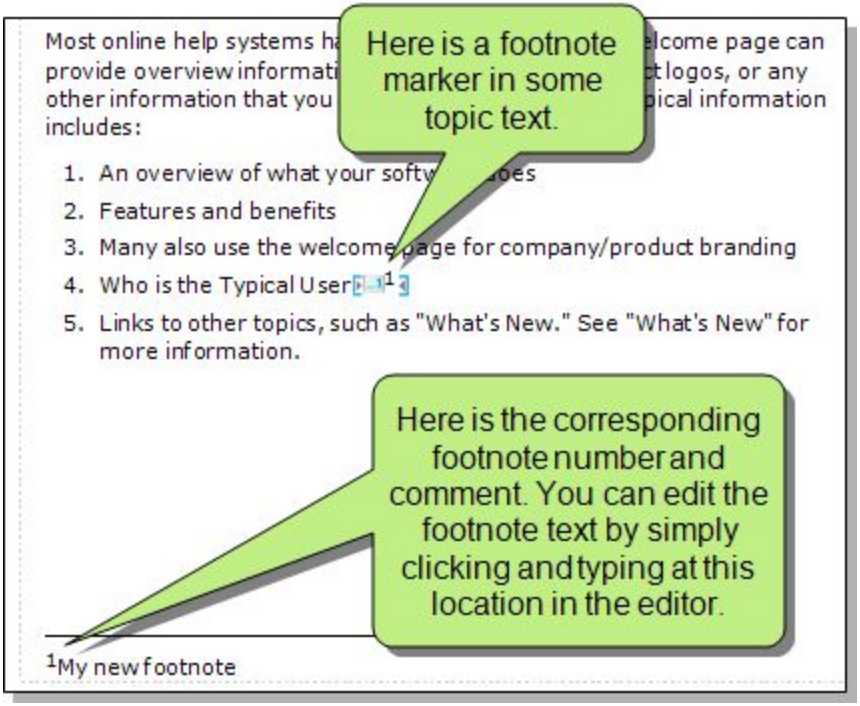
1. Open a content file (e.g., topic).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Tools** ribbon. In the **Update** section select **Update Cross-References**.
   - **Menu** Select **Tools>Update Cross-References**.

   The Update Cross-Reference dialog opens, displaying the destination topics of your cross-references.
3. Click **Update**.

Footnotes

This feature is supported in all outputs.

A footnote is a comment that is used to explain a specific area of the text. It is used primarily for print-based output. Both the area in the text and the comment contain a number or symbol that ties the two together. A footnote comment is typically placed at the end of a page where the corresponding number or symbol is placed in the text. Otherwise, you can place a comment later in the manual, such as at the end of a document, chapter, section, or book; in this case, the comment is usually referred to as an endnote.



Tasks Associated with Footnotes

Following are the primary tasks involving footnotes.

- **Inserting Footnotes or Endnotes** You can insert a footnote marker at any spot in a topic. When doing this, you can specify where the accompanying footnote text should be placed. See "Inserting Footnotes" on the next page.
- **Editing Footnotes or Endnotes** After inserting a footnote, you can edit it in various ways, such as changing the text or modifying the look of the footnote number. You can also specify whether footnote numbering should be restarted at a certain section or chapter. See "Editing Footnotes" on page 60.
- **Creating Endnote Proxies**If you intend to consolidate your endnotes at the end of a manual, you can use an endnotes proxy. This proxy allows you to start the list of endnotes on a new page. See "Creating an Endnotes Proxy" on page 62.

Note: Footnotes are converted to popups in online output.

Inserting Footnotes

You can insert a footnote marker at any spot in a topic. When doing this, you can specify where the accompanying footnote text should be placed.

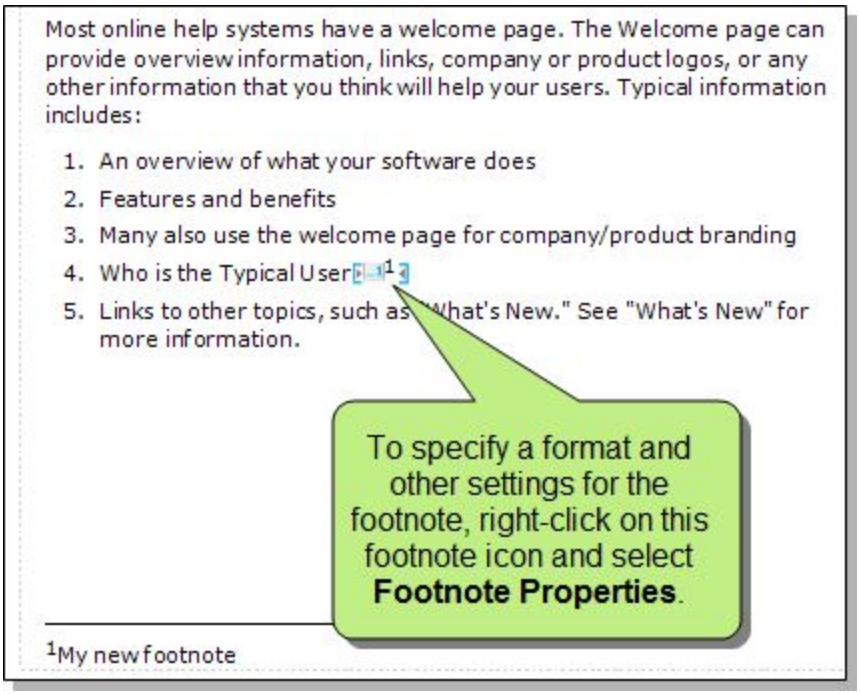
HOW TO INSERT A FOOTNOTE

1. Open the content file (e.g., topic, snippet).
2. Place your cursor where you want to insert the footnote marker.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Text** section, select **Footnote**.
   - **Menu** Select **Insert>Footnote**.

   The Insert Footnote/Endnote dialog opens.
4. In the first part of the dialog, you can select the location where the accompanying footnote or endnote will be placed in the output. However, there is an alternative to selecting a location from this list. In Step 5, you can select a style that can already have the footnote position specified. If you select a style that has the footnote position specified, you do not need to make a selection from this list.
   - **End of Page** This places the footnote comment at the end of the page where the in-text footnote number is inserted.
   - **End of Topic** This places the footnote comment at the end of the topic where the in-text footnote number is inserted. This is similar to the previous option. However, a single topic may result in multiple pages in the output. This option ensures that the footnote is placed at the end of the topic, not necessarily on the same page where the corresponding number or symbol is placed.
   - **End of Section** This places the footnote comment at the end of the section where the footnote number is inserted. You can create section breaks in the TOC Properties dialog.
   - **End of Chapter** This places the footnote comment at the end of the chapter where the footnote is inserted. You can create chapter breaks in the TOC Properties dialog.
   - **Endnote Proxy** This is designed to place the footnote comment at a specific location in the output, such as at the end of the book. It works in conjunction with an endnotes proxy, which you create separately. The comment displays wherever you insert the endnotes proxy.
5. In the next area, you can select a style class for the footnote to determine its look and placement. The <MadCap:-footnote> style is the default option.
6. Click **OK**. The footnote marker is added in the topic. The footnote comment area is added at the bottom of the page or topic, depending on the footnote type you select.

Note: Like other markers, a footnote marker can be hidden in the editor so that only the number can be seen. The marker is not shown in the output, whether you hide or show it in the editor when you are working.

7. Click in the footnote area at the bottom of the page or topic and change the text as necessary.
8. (Optional) You can add other elements (e.g., images) and provide formatting for the content, just as you would in a topic. If you have markers turned on, you can right-click the footnote icon and select **Footnote Properties** from the context menu. This allows you to select a format for the footnote number (e.g., uppercase alpha, lowercase Roman), as well as specify other settings in the Footnote Properties dialog.



9. Click to save your work.

Editing Footnotes

After inserting a footnote, you can edit the footnote number and the accompanying comment in many ways.

FOOTNOTE EDITING TASKS

Following are some of the more common footnote editing tasks. For more information see the online Help or the Flare *Styles Guide*.

- **Border** You can modify the default border that is added above footnote comments. You can change the border thickness, color, style, and other settings. You can also remove the border altogether.
- **Comment Font Settings** You can modify the font in a footnote comment. This includes changing the font family, size, color, case, and more.
- **Comment Position** You can change the location where a footnote comment is placed in the output (e.g., end of page, document, chapter, section, book).
- **Comment Spacing** You can modify the spacing for the footnote comment text. This includes the ability to change the spacing above or below the comment text, the white space between words or characters, or the indentation before the number and text.
- **Comment Text** You can modify the text and other content contained in the footnote comment.
- **Number Format or Symbol** By default, a decimal number (e.g., 1, 2, 3) is used when you insert a footnote. However, you can select a different format. For example, you can change the format to uppercase alpha (e.g., A, B, C) or lowercase Roman (e.g., i, ii, iii). You can also replace the number with a symbol, such as an asterisk.
- **Number—Look** You can change the look of the footnote numbers (both in-text and in-comment), by creating and modifying style classes. Alternatively, you can use the <MadCap|footnote> style or a class of it to modify the look of both the in-text and in-comment footnote numbers. The difference is that the style lets you change the look of one or the other, rather than both at the same time.
- **Number Restart** When you insert footnotes, the numbers are incremented throughout your manual. However, you can restart the numbering at a certain location (e.g., at the beginning of the next chapter or section).

In many cases, you can use either styles or local formatting to make changes to footnotes. It is recommended that you use styles whenever possible.

FOOTNOTE STYLES

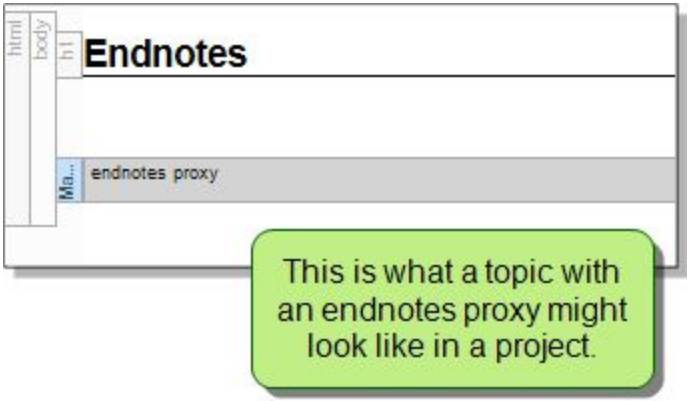
The following styles can be used for editing footnotes.

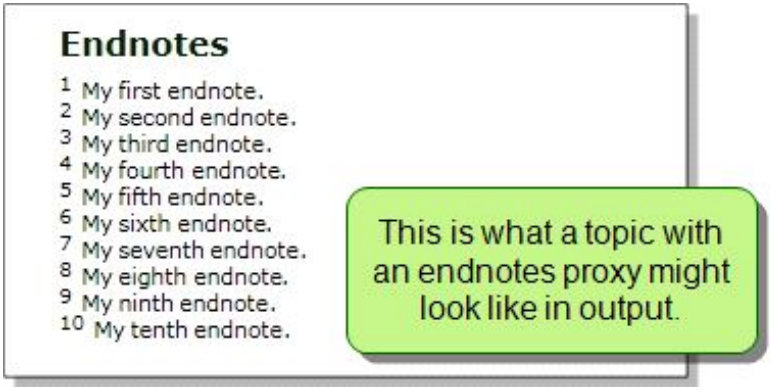
- **MadCap|footnote** This style is used for both the footnote number (or symbol) where it is inserted in the topic, as well as the number and accompanying comment text (at the bottom of the page, or wherever else you specify its location).
- **MadCap|footnoteBlock** This style is used for the container (or block) holding individual footnote comments. For example, if you want to add a border around each footnote comment on a page, you would use this style.
- **MadCap|footnotesBlocks** This style is used for the container (or block) holding all footnote comments. For example, if you want to add a border around the collection of all footnote comments on a page, you would use this style.
- **MadCap|endnoteBlock** This style is used for the container (or block) holding individual endnote comments. For example, if you want to add a border around each endnote comment created from an endnotes proxy, you would use this style.
- **MadCap|endnotesBlocks** This style is used for the container (or block) holding all endnote comments. For example, if you want to add a border around the collection of all endnote comments created from an endnotes proxy, you would use this style.

Creating an Endnotes Proxy

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

If you intend to consolidate your endnotes at the end of a manual, you can use an endnotes proxy. This proxy allows you to start the list of endnotes on a new page.





HOW TO CREATE AN ENDNOTES PROXY

1. Add a new topic as you normally would.
2. At the top of the topic, enter a title for your endnotes section. If you apply any of Flare's <h1> through <h6> tags to it, the endnotes title will be displayed in the print TOC (if you create one).
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Endnotes Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Endnotes Proxy**.

   The Endnotes Proxy dialog opens.
4. (Optional) From the **Stylesheet class for proxy** field, you can select a style for the endnotes.

   You might create and use style classes if you want to generate multiple endnotes sections with different looks for each output. Otherwise, the endnotes section will use the style settings from the parent <MadCap|endnotesProxy> style. You can create a style class for this purpose in the Stylesheet Editor. To do this, select the **MadCap|endnotesProxy** style and click **Add Class** to create a class. The class will then be available from this field. For more information see the online Help or the Flare *Styles Guide*.

   Note: You can also use the <MadCap|endnoteBlock> and <MadCap|endnotesBlock> styles in the Stylesheet Editor.
5. Click **OK**. The proxy is added to the topic.
6. Click to save your work.

Glossaries

This feature is supported in all outputs.

A glossary is a feature that you can add to your output to help users understand the meaning of individual terms. You can include a glossary in both online and print-based output.

A glossary XML file in Flare has an .flglo extension and is stored in the Project Organizer under the Glossaries folder.

Steps for Using Glossaries

Use these steps to create a glossary and make it available to your end users:

1. **Add/Open Glossary** If you do not want to use the initial glossary provided by Flare, you can add one. Otherwise, open the existing glossary from the Project Organizer to work on it. See "Adding a Glossary File" on the following page or "Opening a Glossary" on page 67.
2. **Create Glossary Terms and Definitions** After you add a new glossary or open an existing one, you can create glossary terms and definitions. See "Creating Glossary Terms and Definitions" on page 68.
3. **Create Glossary for Print Output** To create a glossary manually for print output, you need to create a unique topic and insert a glossary proxy into it. Alternatively, you can let Flare auto-generate one for you. See "Creating a Glossary Manually for Print" on page 85 and "Auto-generating Glossaries for Print" on page 71.
4. **Edit Glossary** You may need to edit the terms or definitions. You also may want to use styles to change look of glossary elements. For more information see the online Help or the Flare *Styles Guide*.
5. **Associate Master Glossary With Target** Finally, you need to associate the glossary with a target. After you build the target, the glossary will be incorporated into the output. See "Associating Glossaries with Targets" on page 89.

Adding a Glossary File

Flare may provide you with an initial glossary called "MyGlossary," to which you add terms and definitions using the Glossary Editor. You can use this initial glossary, but you can also add more glossaries if you want.

EXAMPLE

Let's say the documentation team where you work is creating many manuals for different products in the company. The documentation manager has decided that each glossary in each manual must contain certain terms and definitions.

Your team could create a glossary with the same terms and definitions, calling it "CorporateGlossary." Flare would create an XML glossary file called "CorporateGlossary.flglo" behind the scenes. Authors on the team could then share copies of that glossary file. Each author adds the glossary to his or her project and associates the glossary with any targets to be compiled.

Each author might then have another glossary specific to his or her manual, containing terms and definitions that are not used in all projects.

HOW TO ADD A NEW GLOSSARY FILE TO A PROJECT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Glossary**.
   - **Menu** Select **Project>Add Glossary**.
   - **Right-Click** In the Project Organizer, right-click on the **Glossaries** folder and from the context menu select **Add Glossary**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Glossary** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     Note: In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.
   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the 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 glossary.
6. Click **Add**. The glossary is added to the Glossaries folder in the Project Organizer. The Glossary Editor opens to the right, with an initial glossary term and definition shown.

Opening a Glossary

When you want to work on an existing glossary, use the following steps to open it.

HOW TO OPEN AN EXISTING GLOSSARY

1. Make sure the Project Organizer is open.
2. Double-click the **Glossaries** folder. The glossaries in your project are displayed.
3. Double-click the glossary that you want to open. The Glossary Editor opens to the right.

Creating Glossary Terms and Definitions

After you add a new glossary or open an existing one, you can create terms and definitions. There are two basic methods for creating glossary entries: (1) adding entries to the glossary directly, and (2) inserting glossary term links. If you use glossary term links and generate print-based output, those links are converted to footnotes placed at the end of each page in the output. (Glossary term links are not supported in PDF output.)

Adding Entries to the Glossary Directly

Use this method to simply add terms and definitions to a glossary.

1. From the Project Organizer, open the glossary to which you want to add glossary entries.
2. In the local toolbar of the Glossary Editor, click to add a new item. A new row is added to the glossary, with "MyTerm" shown as the default name. The Properties dialog for the glossary term opens.
3. In the **Terms** section, replace the text "MyTerm," and type the new term.
4. In the **Definition** section, select either **Text** (if you want to provide a simple text definition for the term) or **Topic** (if you have created a topic for the definition and want the term to link to it). For print-based output, it probably makes the most sense to use the "Text" option.
5. If you selected "Text," type a definition in the space next to that option. If you selected "Topic," click ..., then find and select a topic.
6. Click **OK**.
7. Click to save your work.

Inserting Glossary Term Links

Use this method to select words and phrases in your topics that you want to add to the glossary. The word or phrase is converted to a glossary term link, which lets users access the definition from that location in the output. In print-based output, glossary term links are converted to footnotes at the bottom of the page. After a glossary term has been added to the Glossary Editor, you can insert subsequent glossary links even faster using the Glossary Terms window pane.

HOW TO INSERT GLOSSARY TERM LINKS WHILE CREATING NEW TERMS AT THE SAME TIME

1. Open the content file (e.g., topic, snippet).
2. Highlight the word or phrase that you want to add as a glossary term and link. Then do one of the following depending on what part of the user interface you are using.
   - **Ribbon** Select the **Insert** ribbon. In the **Links** section select **Glossary Term Link**.
   - **Menu** Select **Insert>Glossary Term Link**.
   - **Keyboard Shortcut** Press **CTRL+SHIFT+T**.

   The Create Glossary Term dialog opens.
3. If necessary, select the glossary on the right side of the dialog.
4. In the **Definition** field, type a definition for the term.
5. Click **OK**. The word or phrase is now shown as a linked glossary term with an icon beside it. The term and definition are added to the glossary.
6. Click to save your work.

HOW TO INSERT GLOSSARY TERM LINKS FOR TERMS THAT HAVE ALREADY BEEN CREATED

1. Open the content file (e.g., topic, snippet).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Glossary Terms**.
   - **Menu** Select **Tools>Glossary Terms**.

   The Glossary Terms window pane opens, listing all the terms already added to the glossary.
3. In the Glossary Terms window pane, double-click the term that you want to insert as a glossary link. Make sure you double-click under the **Term** column. If you double-click anywhere else in the row (under the Definition or File column), the Glossary Editor opens instead. The word or phrase is now shown as a linked glossary term with an icon beside it.
4. Click to save your work.

Note: You can also configure a target to convert existing glossary terms to links automatically. For more information see "Associating Glossaries with Targets" on page 89.

Auto-generating Glossaries for Print

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

To create a generated glossary in print output, you can let Flare auto-generate one for you, or you can create a unique topic and insert a glossary proxy into it (see "Creating a Glossary Manually for Print" on page 85).

The following explains how to auto-generate a glossary.

HOW TO AUTO-GENERATE A GLOSSARY

1. Open a target.
2. On the **Advanced** tab of the Target Editor, select **Generate Glossary Proxy**.

   Note: This option is disabled by default for existing targets, but enabled for new targets. If a glossary proxy is already present in a topic or snippet that is being included in the output, this auto-generate option has no effect.

3. Click to save your work.

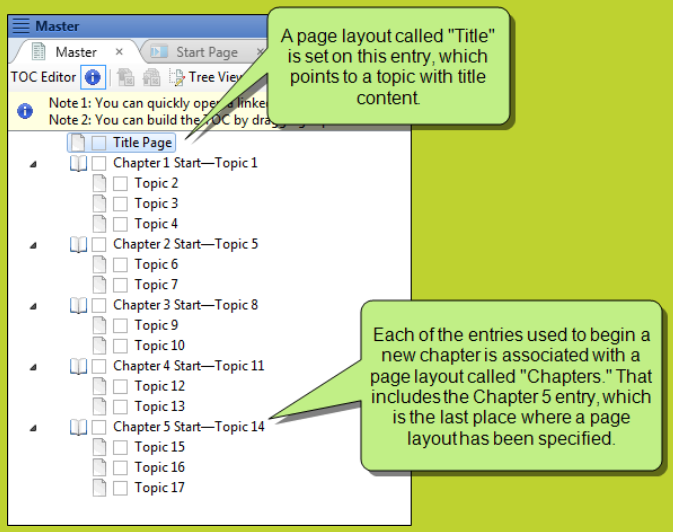
When you generate the target, a glossary will be created and inserted after all of the other content, but before an auto-generated index, if you include one.

WHICH PAGE LAYOUT IS USED?

If a TOC, index, or glossary is auto-generated, how does Flare know which page layout to use for them in the output? It uses the same page layout that is being used for the topic(s) just before it.

E X A M P L E

Let's say you have an outline TOC set up like this:



In this case, the generated TOC is going to be placed directly after the title page. It will use the "Title" page layout which is set on the first "Title Page" entry. That page layout has a Title page type in it. That's how Flare knows it should place the TOC directly after it and to use the same page layout to display the TOC.

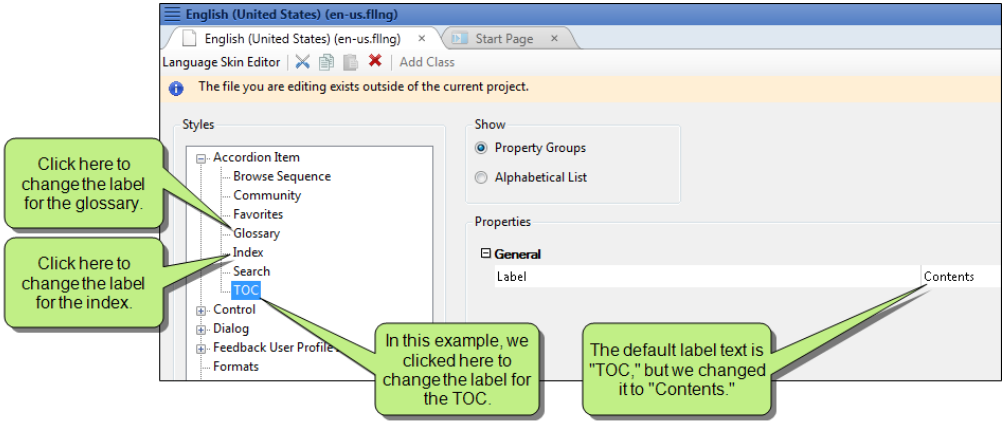
The generated glossary is going to be placed after the final entry, called "Topic 17," and the generated index will be placed after the glossary. Both of these will use the "Chapters" page layout, because it's the last one that was set.

AUTO-GENERATE VERSUS MANUAL PROXIES

The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.

EDITING ATTRIBUTES FOR GENERATED TOCS, INDEXES, AND GLOSSARIES

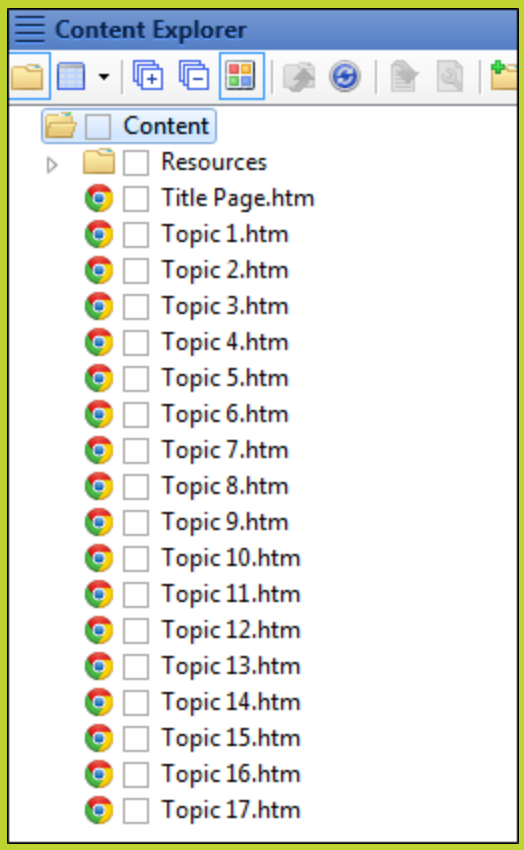
You can change the heading text for each of these auto-generated proxies in the language skin.



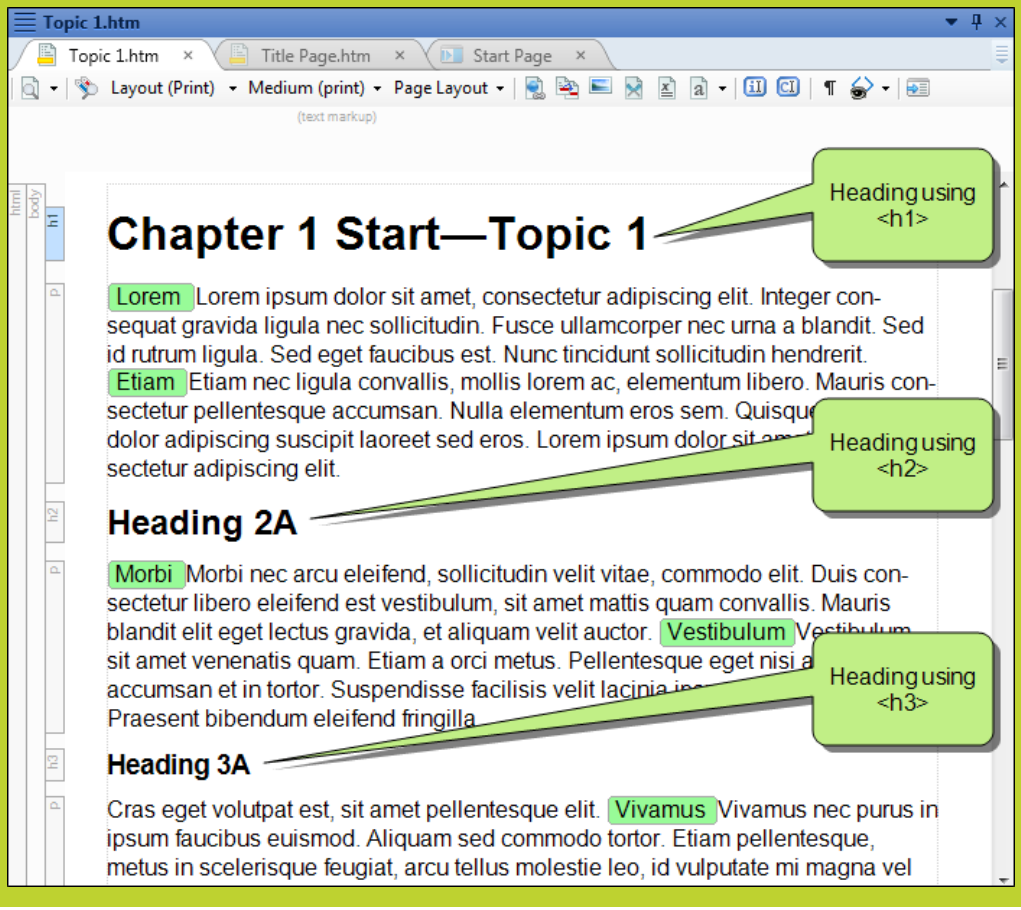
All other attributes for the generated glossary, index, and TOC can be controlled in your stylesheet.

E X A M P L E

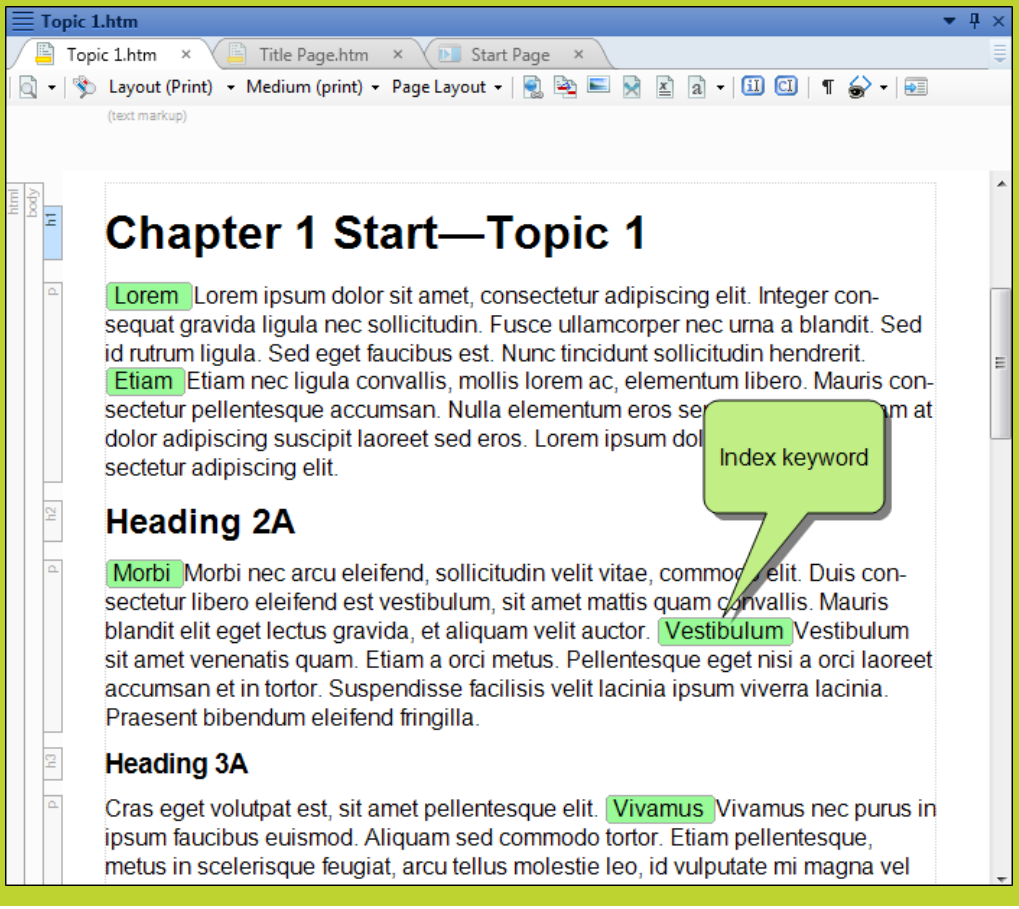
Let's say you need to create a PDF manual with five short chapters. You've created 17 topics that will make up those five chapters, and you've created a separate topic for a title page.



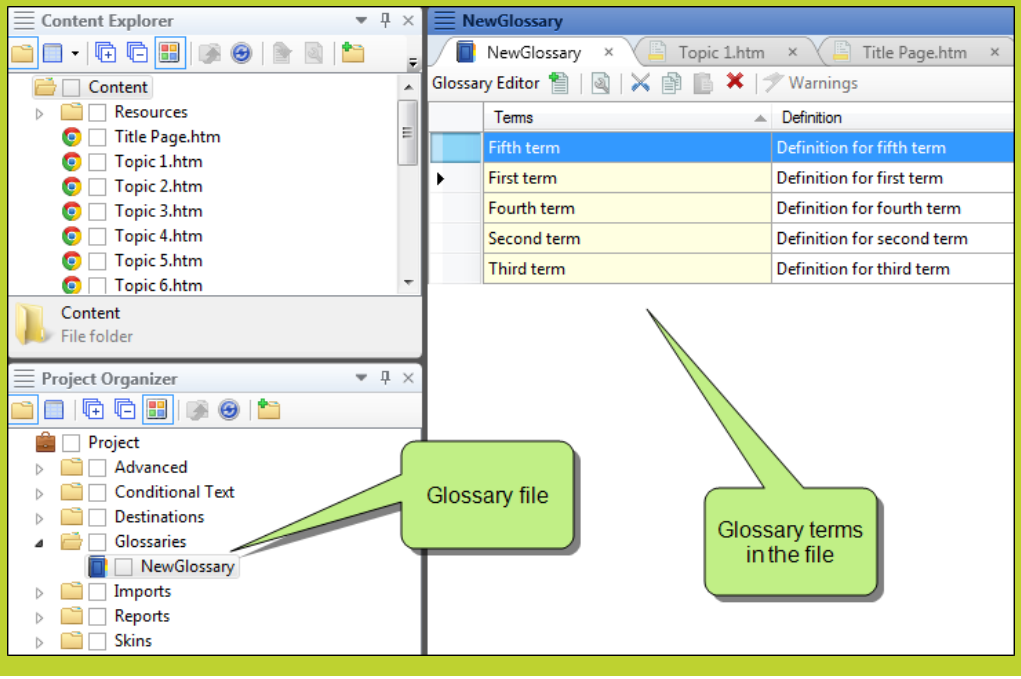
Your topics use <h1>, <h2>, and <h3> tags. These will become important when the TOC is generated.

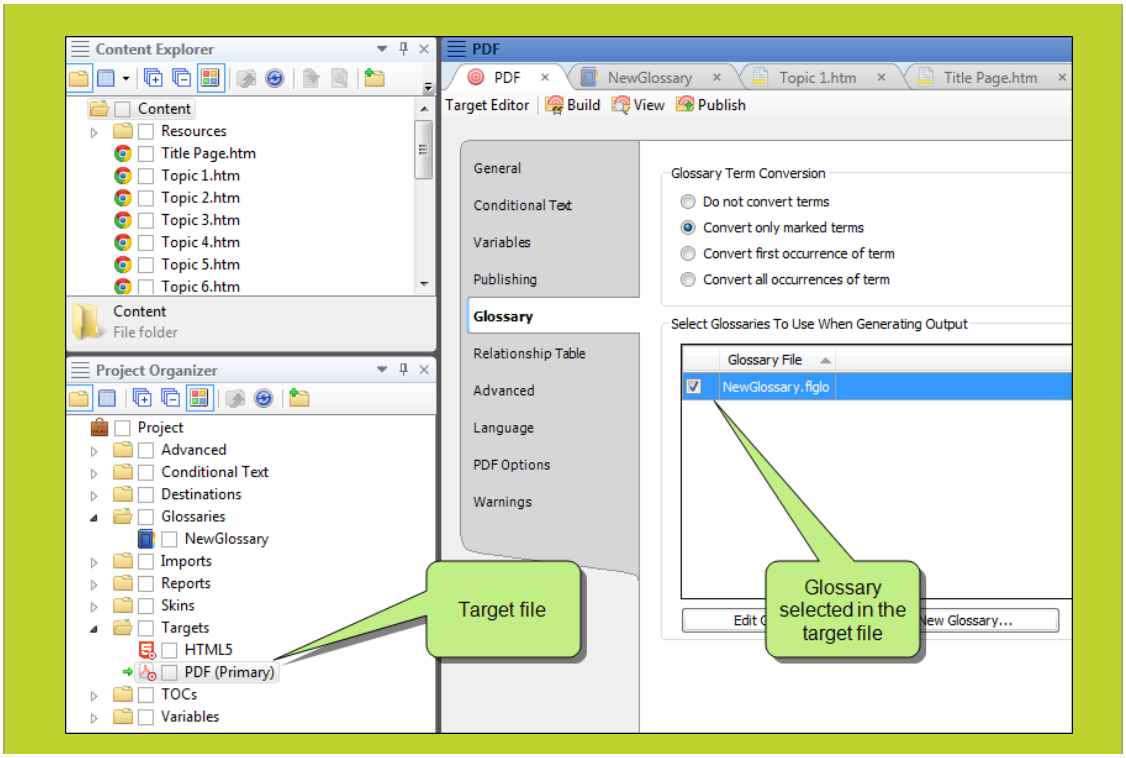


You've inserted index keywords throughout the topics. These will become important when the index is generated.

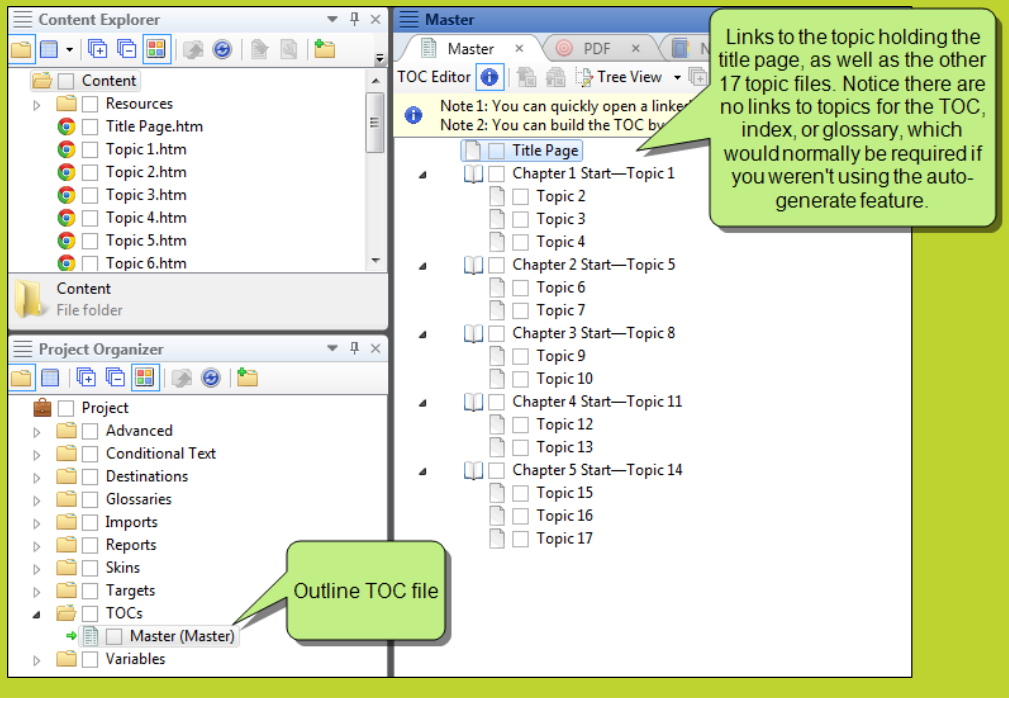


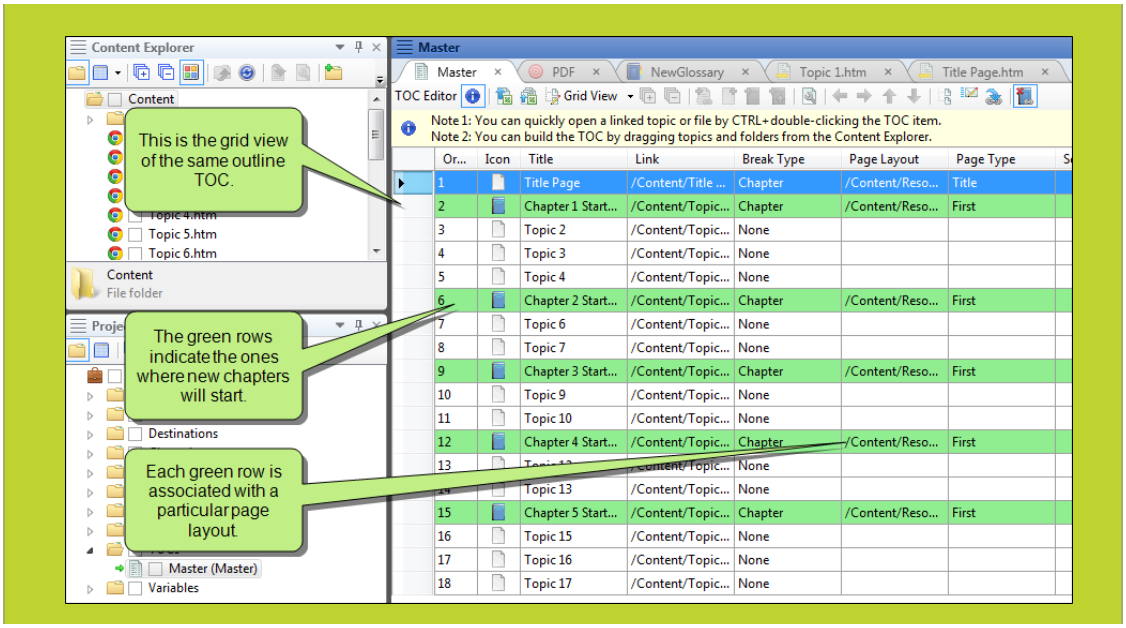
You've created a glossary file and associated it with the PDF target you're going to use. This will become important when the glossary is generated.



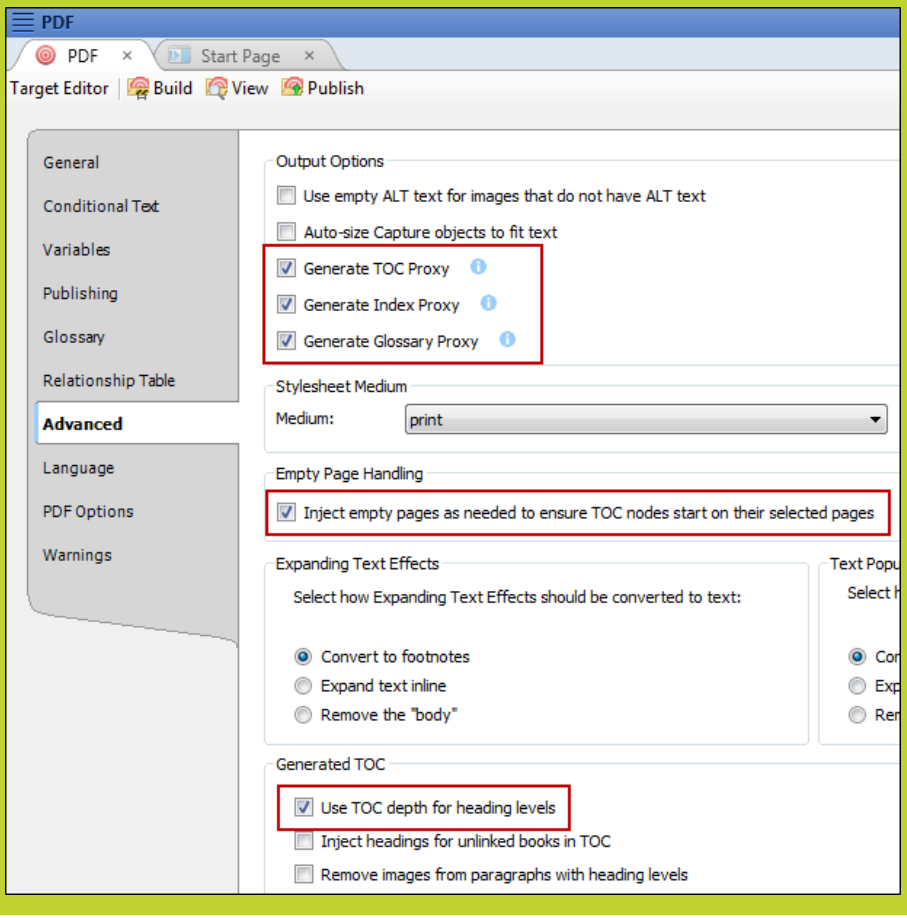

Content Explorer
Content
Resources
Title Page.htm
Topic 1.htm
Topic 2.htm
Topic 3.htm
Topic 4.htm
Topic 5.htm
Topic 6.htm
Content
File folder
Project Organizer
Project
Advanced
Conditional Text
Destinations
Glossaries
NewGlossary
Imports
Reports
Skins
Targets
HTML5
PDF (Primary)
TOCs
Variables
PDF
PDF
NewGlossary
Topic 1.htm
Title Page.htm
Target Editor
Build
View
Publish
General
Conditional Text
Variables
Publishing
Glossary
Relationship Table
Advanced
Language
PDF Options
Warnings
Glossary Term Conversion
Do not convert terms
Convert only marked terms
Convert first occurrence of term
Convert all occurrences of term
Select Glossaries To Use When Generating Output
Glossary File
NewGlossary.fglo
Target file
Glossary selected in the target file

You've put all of your topics into an outline TOC file. You've associated your title topic with one page layout, and you've assigned a different page layout to the five topics that will serve as the starting point for each of the five chapters.

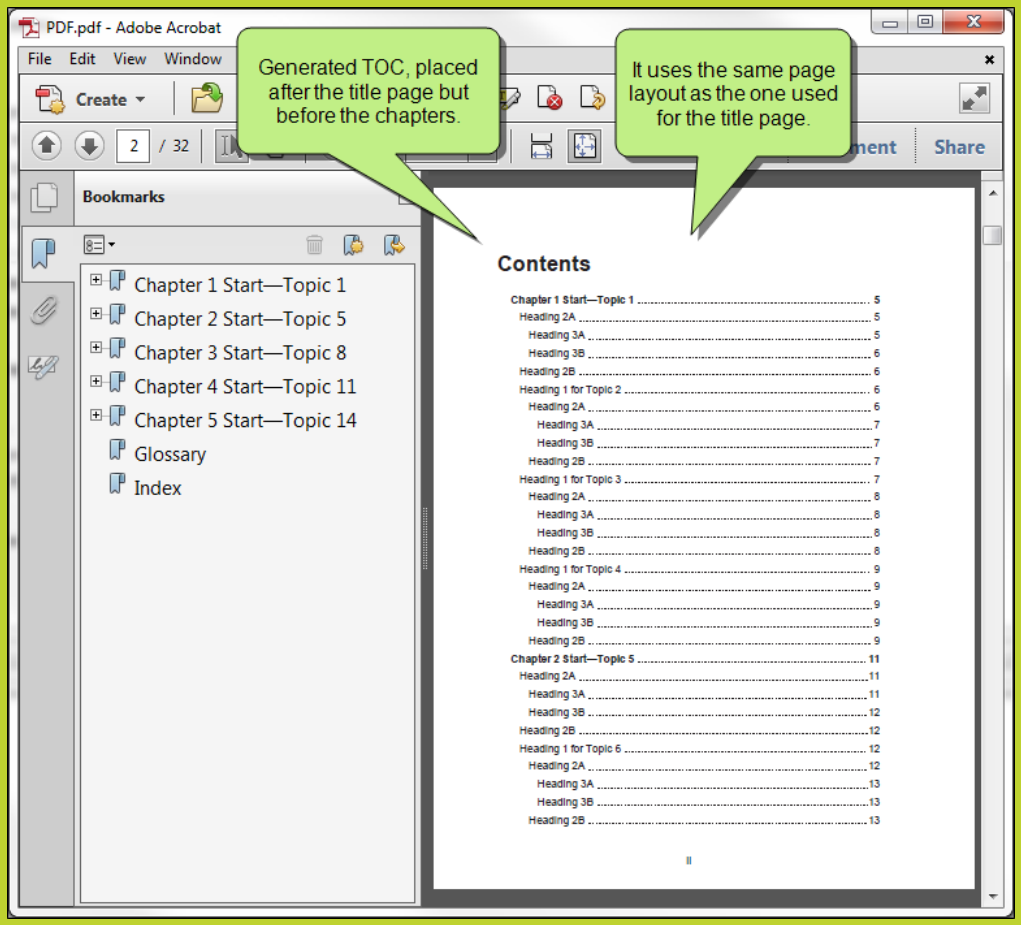


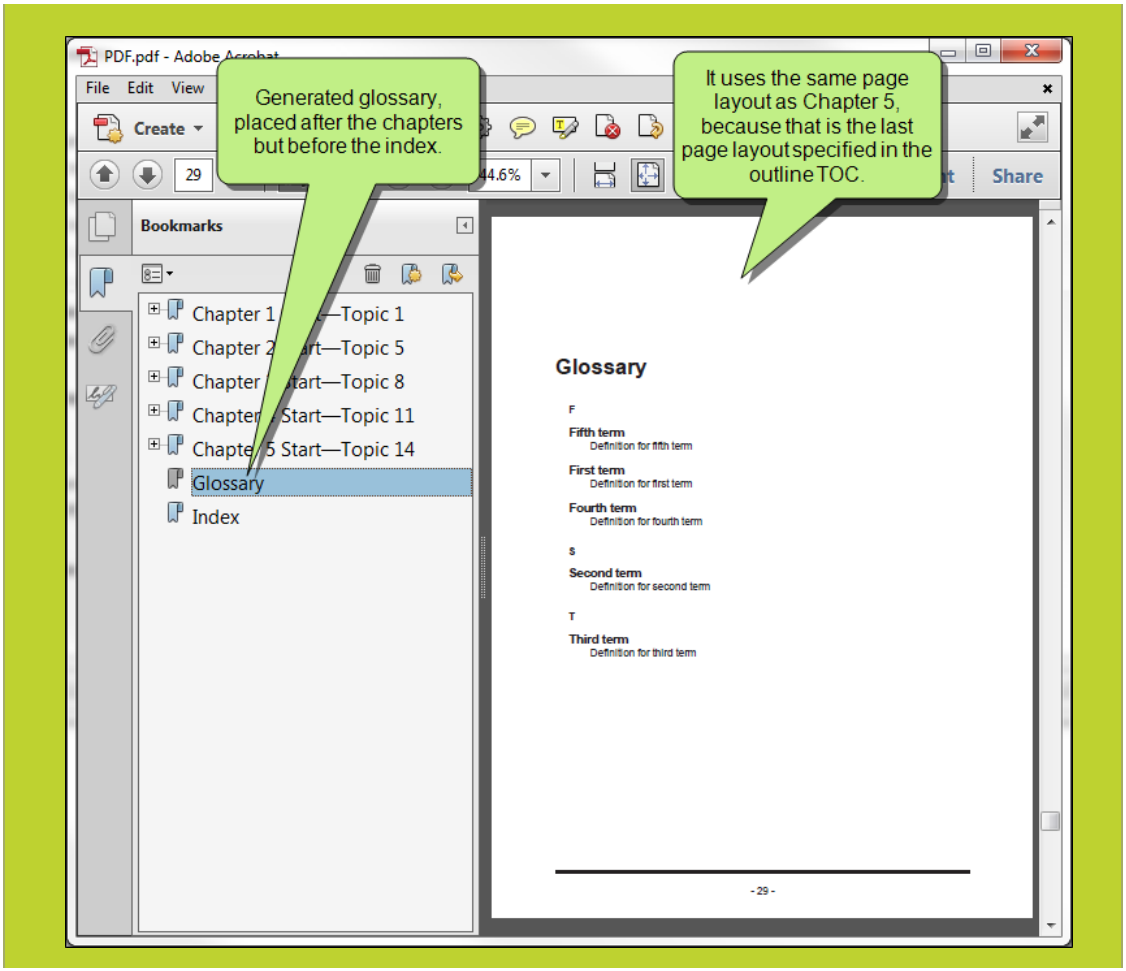

Content Explorer
Content
Topic 5.htm
Topic 6.htm
Content
File folder
Destinations
Master (Master)
Variables
This is the grid view of the same outline TOC.
The green rows indicate the ones where new chapters will start.
Each green row is associated with a particular page layout.
Master
Master
PDF
NewGlossary
Topic 1.htm
Title Page.htm
TOC Editor
Grid View
Note 1: You can quickly open a linked topic or file by CTRL+double-clicking the TOC item.
Note 2: You can build the TOC by dragging topics and folders from the Content Explorer.
Or... Icon Title Link Break Type Page Layout Page Type
1 Title Page /Content/Title ... Chapter /Content/Reso... Title
2 Chapter 1 Start... /Content/Topic... Chapter /Content/Reso... First
3 Topic 2 /Content/Topic... None
4 Topic 3 /Content/Topic... None
5 Topic 4 /Content/Topic... None
6 Chapter 2 Start... /Content/Topic... Chapter /Content/Reso... First
7 Topic 6 /Content/Topic... None
8 Topic 7 /Content/Topic... None
9 Chapter 3 Start... /Content/Topic... Chapter /Content/Reso... First
10 Topic 9 /Content/Topic... None
11 Topic 10 /Content/Topic... None
12 Chapter 4 Start... /Content/Topic... Chapter /Content/Reso... First
13 None
Topic 13 /Content/Topic... None
15 Chapter 5 Start... /Content/Topic... Chapter /Content/Reso... First
16 Topic 15 /Content/Topic... None
17 Topic 16 /Content/Topic... None
18 Topic 17 /Content/Topic... None

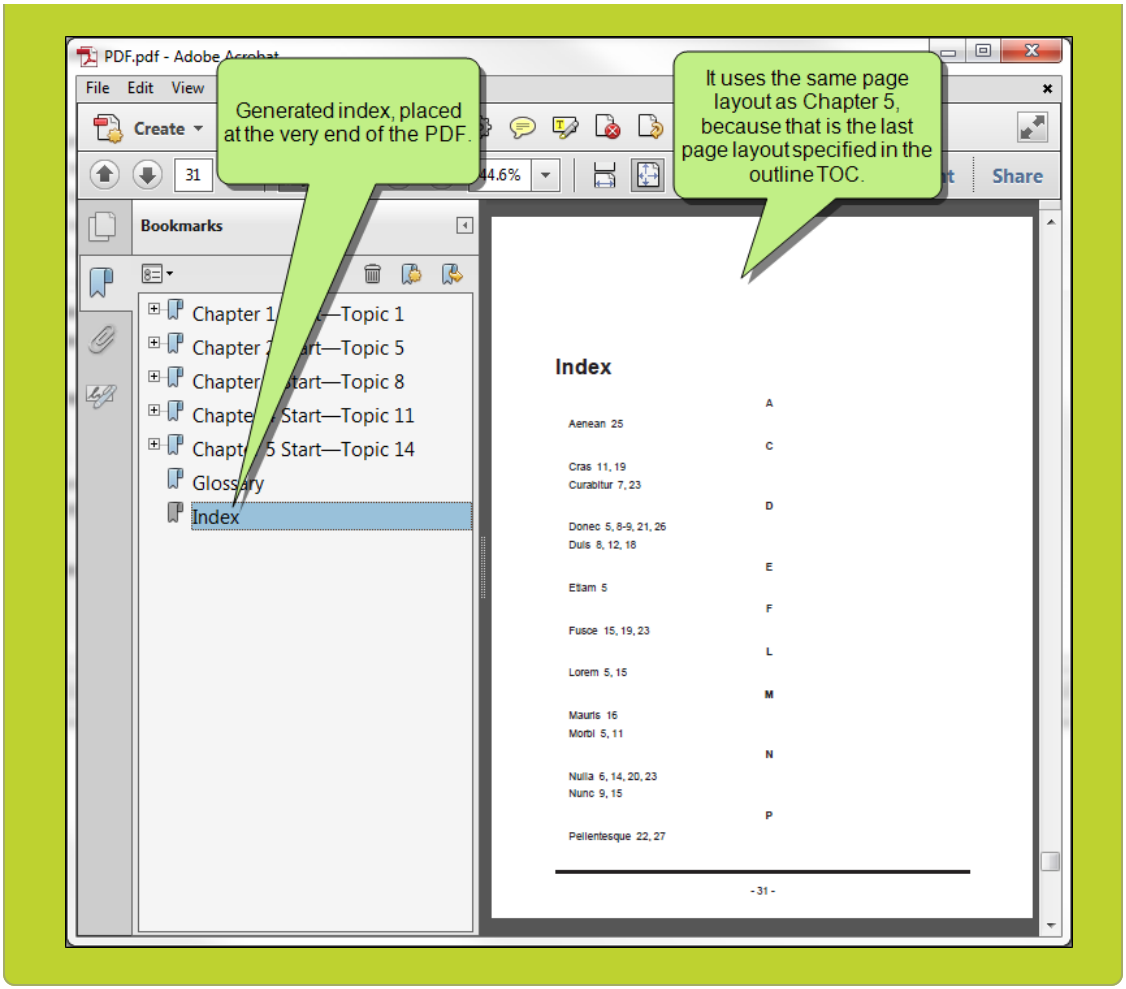
In the Target Editor, you select the **Advanced** tab and select **Generate TOC Proxy**, **Generate Index Proxy**, and **Generate Glossary Proxy**. In addition, you also select an option labeled **Inject empty pages as needed to ensure TOC nodes start on their selected pages** and another labeled **Use TOC depth for heading levels**. These last two options are not required to use the auto-generate feature, but they are popular options for generating print-based output.



After you generate the PDF output, it looks something like this:




PDF.pdf - Adobe Acrobat
File Edit View
Create
29
44.6%
Share
Bookmarks
Chapter 1 —Topic 1
Chapter 2 rt—Topic 5
Chapter tart—Topic 8
Chapter Start—Topic 11
Chapter 5 Start—Topic 14
Glossary
Index
Generated glossary, placed after the chapters but before the index.
It uses the same page layout as Chapter 5, because that is the last page layout specified in the outline TOC.
Glossary
F
Fifth term
Definition for fifth term
First term
Definition for first term
Fourth term
Definition for fourth term
S
Second term
Definition for second term
T
Third term
Definition for third term
- 29 -



Note: In order for a glossary to be generated, you must have a glossary file in your project that is associated with the target.

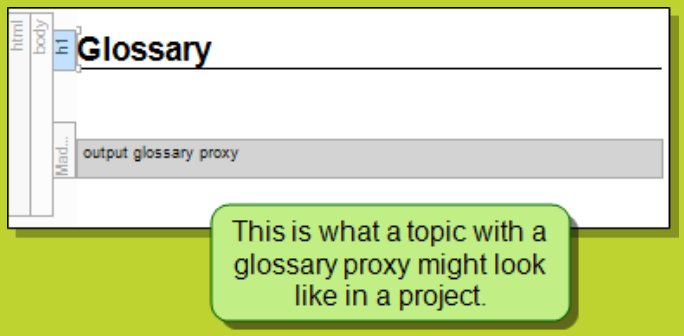
Creating a Glossary Manually for Print

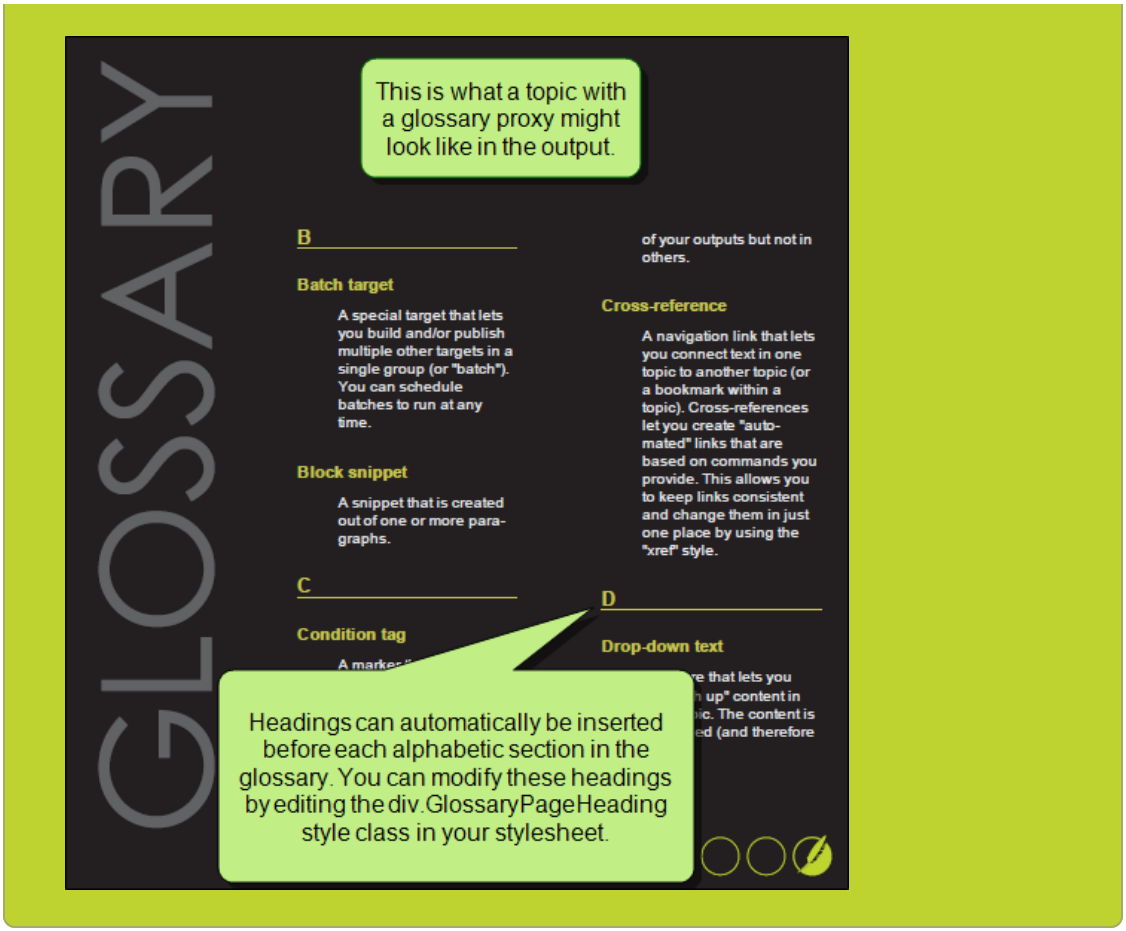
This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

To create a glossary manually for print output, you need to create a unique topic and insert a glossary proxy into it. Alternatively, you can let Flare auto-generate one for you (see "Auto-generating Glossaries for Print" on page 71).

The following explains how to use the manual method.

EXAMPLE




GLOSSARY
This is what a topic with a glossary proxy might look like in the output.
B
Batch target
A special target that lets you build and/or publish multiple other targets in a single group (or "batch"). You can schedule batches to run at any time.
Block snippet
A snippet that is created out of one or more para-graphs.
C
Condition tag
of your outputs but not in others.
Cross-reference
A navigation link that lets you connect text in one topic to another topic (or a bookmark within a topic). Cross-references let you create "auto-mated" links that are based on commands you provide. This allows you to keep links consistent and change them in just one place by using the "xref" style.
D
Drop-down text
Headings can automatically be inserted before each alphabetic section in the glossary. You can modify these headings by editing the div.GlossaryPageHeading style class in your stylesheet.

HOW TO CREATE GLOSSARY MANUALLY FOR PRINT

1. Add a new topic as you normally would.
2. At the top of the topic, enter a title for your glossary. If you apply any of Flare's <h1> through <h6> tags to it, the glossary title will be displayed in the print TOC (if you create one).
3. Most likely, you will want to remove any text after the glossary title.
4. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Glossary Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Glossary Proxy**.

   The Glossary Proxy dialog opens.
5. If you want headings (e.g., A, B, C, D) to be added automatically at the top of each section in the glossary, click the down arrow in the **Generate Headings** field and select **Yes**.
6. (Optional) From the **Stylesheet class** field, you can select a style for the glossary.

   For example, you might create and use style classes if you want to generate multiple glossaries with different looks for each output. Otherwise, the glossary will use the style settings from the parent <MadCap|-glossaryProxy> style. You can create a style class for this purpose in the Stylesheet Editor. To do this, select the **MadCap|glossaryProxy** style and click **Add Class** to create a class. The class will then be available from this field in the Glossary Proxy dialog. For more information see the online Help or the Flare *Styles Guide*.

   > **Note:** If you want to affect the look of the individual entries in the generated glossary, you can also use the following in the Stylesheet Editor, which can be found by expanding the parent tag: GlossaryPageDefinition, GlossaryPageEntry, GlossaryPageHeading, and GlossaryPageTerm. For example, if you want to use blue font for each term in the generated glossary, you can change the font color setting on the div.GlossaryPageTerm style class.

7. Click **OK**. The proxy is added to the topic.
8. Click to save your work.

AUTO-GENERATE VERSUS MANUAL PROXIES

The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.

Note: For Adobe PDF, Microsoft XPS, and XHTML output, you can insert glossary-related Heading variables into page layouts. These variables let you automatically display glossary headings and terms at the top of pages. See "Inserting Heading Variables Into Frames" on page 433.

Make sure to add the topic with the proxy to the outline TOC. See "Including Print Topics in an Outline TOC" on page 539.

Associating Glossaries with Targets

One of the final steps to creating a glossary is to associate it with a target. After you build the target, the glossary will be incorporated into the output.

HOW TO ASSOCIATE A GLOSSARY WITH A TARGET

1. Open the target from the Project Organizer.
2. In the Target Editor, click the **Glossary** tab.
3. (Optional) In the **Glossary Term Conversion** section, select one of the options if you want to make use of glossary term links:

   Note: The conversion of a glossary term to a link is case-sensitive. For example, if a term starts with an uppercase letter in the glossary, it will not be converted to a link in the output if the term is all lowercase in the topic.

4. Click the check box next to each glossary that you want to associate with the target. A check mark is added to the box.
5. Click to save your work.

Indexes

This feature is supported in all outputs.

You can include an index in your output through the use of index keywords. An index proxy.

Unlike some features in Flare, there is no independent index file in your project that becomes the index in your output. Instead, the index is automatically generated when you build output, based on index keywords that you provide in the project.

Benefits of the Flare Method of Indexing

Flare's method of producing an index includes the following benefits.

- **Prevents Index Keywords from Pointing to Deleted Content** Let's say you have inserted an index keyword within a particular paragraph in a topic. Later, you decide to delete the paragraph. Doing this also deletes the index keyword, so when the index is generated, that index keyword is no longer included in it. You do not have to remember to delete the index keyword from another location or file.
- **Copies Index Keywords for You** Let's say you have inserted an index keyword within a particular paragraph in a topic. You then copy that paragraph and paste it into another topic. When you do this, the index keyword is also copied, which means that you do not have to worry about creating it again for that topic.

Online Index Versus Printed Index

An index in Flare works much like an index in a printed book. It provides key terms that point the user or reader to specific locations where the information is stored. The main difference is that, in a printed book, a reader must manually turn pages to get to the desired page listed in the index. In online output, an end user simply clicks an item in the index and the item opens immediately.

When you create print output, you can convert your online index to printed format.

When Should You Add Index Keywords?

There is no right or wrong answer to this. As you gain experience, you will develop your own work habits that fit you best. Some authors add index keywords as they work on each topic. Other authors wait until they are near the end of the development process and add index keywords all at once. Here are a few benefits of waiting until the later in the process to add index keywords:

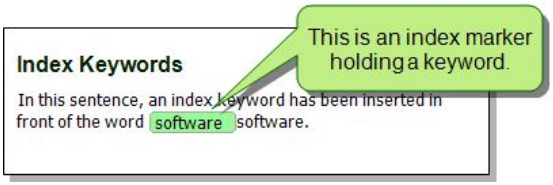
- If you add index keywords as you create and work on each topic, it's possible that you will forget to add index keywords if you later make changes to a topic. If you wait until the later in the process to add index keywords all at once, you are less likely to miss sections in topics.
- You might find that your wording is more consistent if you wait to add all your index keywords at the same time. Projects can take months to develop, and over time it is easy to stray from using consistent terms.

> **EXAMPLE**
>
> Early in the development process, you might start using the word "modify" in several index keywords, but later on you might forget and start using the word "change" instead. In the end, some topics would be connected to index keywords using the word "modify," while other topics would be connect to keywords using the word "change."

- For authors who add index keywords all at once, Flare provides two features that can be quite useful ("Index Entry Mode" and "saved layouts").

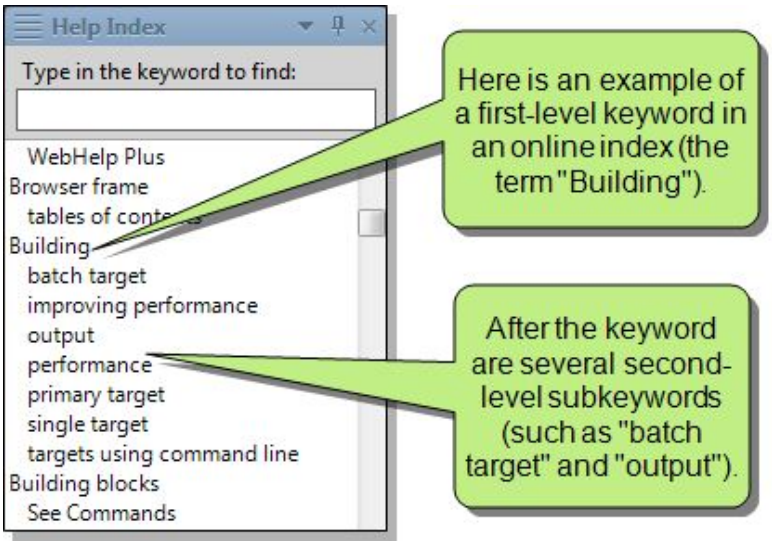
Keywords and Subkeywords

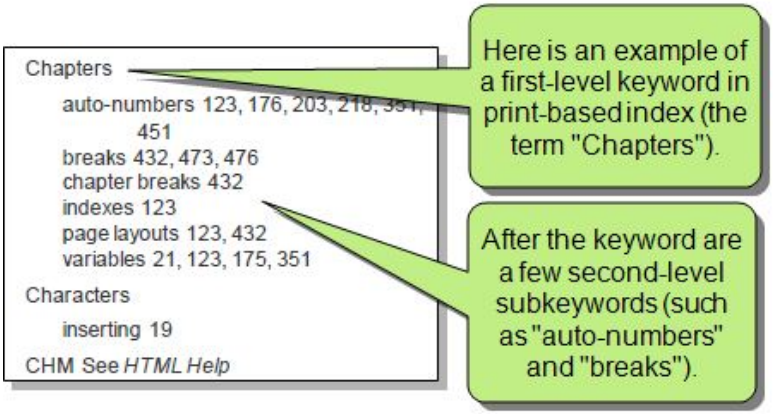
Keywords and subkeywords are the primary building blocks for an index. They are displayed in topics (as you edit them) as markers; each marker can hold multiple keywords.



Keywords are simply terms at the first level in an index. You might have a term that can be broken down even further. In that case, you might decide to also create subkeywords, which are at the second-level in an index.

When you generate the output the index is automatically created based on these keywords and subkeywords. The keywords and subkeywords are visible to the end user in the generated index, but not in the individual topics.


Help Index
Type in the keyword to find:
WebHelp Plus
Browser frame
tables of conte
Building
batch target
improving performance
output
performance
primary target
single target
targets using command line
Building blocks
See Commands
Here is an example of a first-level keyword in an online index (the term "Building").
After the keyword are several second-level subkeywords (such as "batch target" and "output").


Chapters
auto-numbers 123, 176, 203, 218,
451
breaks 432, 473, 476
chapter breaks 432
indexes 123
page layouts 123, 432
variables 21, 123, 175, 351
Characters
inserting 19
CHM See HTML Help
Here is an example of a first-level keyword in print-based index (the term "Chapters").
After the keyword are a few second-level subkeywords (such as "auto-numbers" and "breaks").

Steps for Using Indexes

Following are the main steps for creating an index and making it accessible to end users.

1. **Create Indexes** In Flare there are a few different ways to create an index with keywords and subkeywords.
   - **Method 1—Add Keywords to Index and Assign Topics** You can use the bottom area of the Index window pane (select **View>Index Window**) to add index keywords and subkeywords (see "Adding Index Keywords" on page 95) and assign topics to them (see "Assigning Topics to Index Keywords" on page 100). So this method involves two separate steps—first you bring the keywords into existence, and then you assign them to topics. Because unless the keywords are associated with topics, they won't show up in the output. The major benefit of this method is that it is an easy and quick way to place the same index marker at the beginning of multiple topics and maintain better consistency in the index.
   - **Method 2—Insert Keywords in Individual Topics or Snippets** You can open a topic or snippet and use the top area of the Index window pane to insert index keywords and subkeywords into that file (see "Inserting Index Keywords" on page 105). So with this method you are bringing the keywords into existence and associating them with topics or snippets in the same step. The major benefit of this method is that it lets you place index markers at specific places in a topic or snippet, as opposed to the very beginning of the file. While this method allows you the most control, it takes more time than the other methods.
   - **Method 3—Create Auto-Index** You can automatically add words to an index by creating an auto-index. With this method Flare scans your project when you build output to find certain words that you tell it to find. If those words are found, index entries are added to the generated index automatically (see "Creating Auto-Indexes" on page 111). The major benefit of this method is that it is quick and easy. However, it does not allow you as much control as the other methods. You might select this method to give you a starting place for an index and then use one of the other methods to add to it or tweak it.
2. **Create Index Links** In addition to creating regular index entries that point to a specific place in your project, you can also create index links. An index link is an entry in a generated index that points to another entry. There are three kinds of index links—"See," "See Also," and "Sort As." See "Creating Index Links" on page 115.
3. **Create Index for Print Output** To create an index manually for print output, you need to create a unique topic and insert an index proxy into it. Alternatively, you can let Flare auto-generate one for you. See "Creating an Index Manually for Print" on page 143 and "Auto-generating Indexes for Print" on page 129.

> **Note:** If you are using chapter or volume autonumbers and you want these numbers to be reflected in a print index, you can do so by specifying the autonumbers at the appropriate locations in your outline TOC (instead of inserting Chapter or Volume Number variables in a page layout). See "Page Autonumbers in Print Indexes" on page 149.

4. **Modify Index** You can customize the way the index looks in your output. This includes adjusting properties such as the font family and size, word spacing, and the space above/below. For more information see the online Help or the Flare *Styles Guide*.

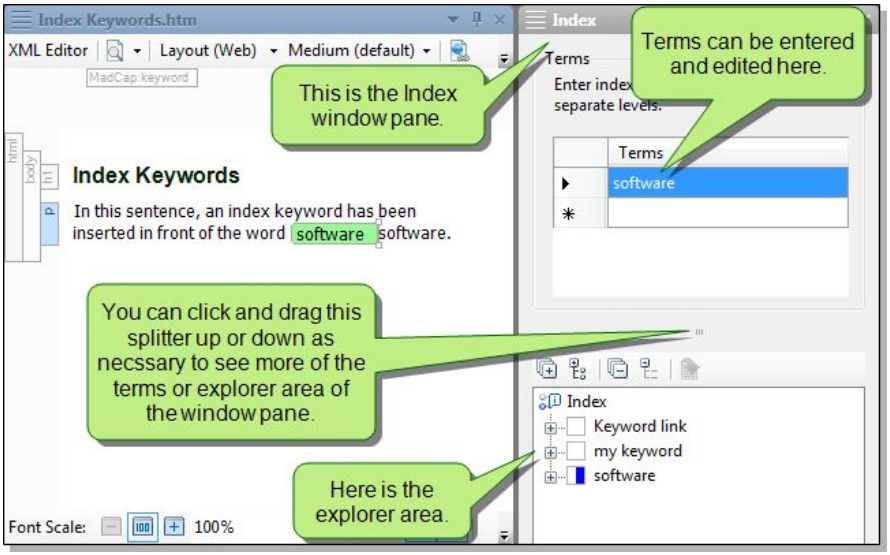
Adding Index Keywords

Use the following steps to add index keywords.

HOW TO ADD AN INDEX KEYWORD OR SUBKEYWORD

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9**.

   The Index window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



2. Do one of the following, depending on whether you are adding a first-level keyword or a second-level index keyword:

   - **First-Level Keyword** Right-click the explorer area at the bottom of the window pane, and select **Add Top-Level Keyword** from the context menu.

     OR

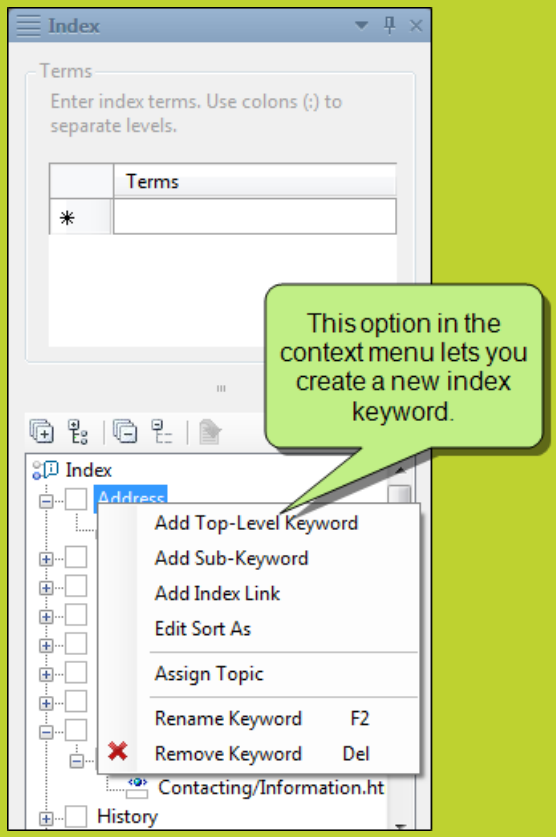
   - **Second-Level Subkeyword** In the explorer area at the bottom of the window pane, right-click an existing top-level keyword. From the context menu select **Add Sub-Keyword**.

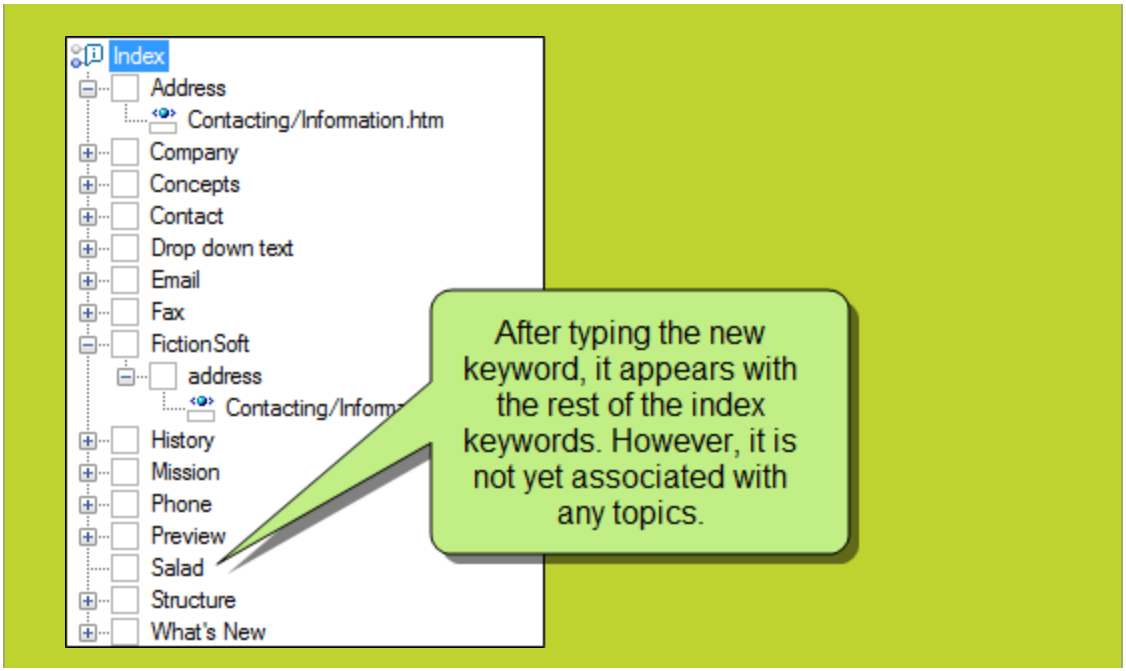
> **Note:** If you want to add a keyword that begins with a colon, you need to type a backwards slash \ first, followed by the colon and then the term (e.g., \:My keyword). If you want to add a subkeyword that starts with a colon, you can do the same, although you still need to include the original colon that indicates it is a subkeyword (e.g., My keyword:\:mysubkeyword).

3. Type the index keyword as you want it to appear in the index and press **Enter**.

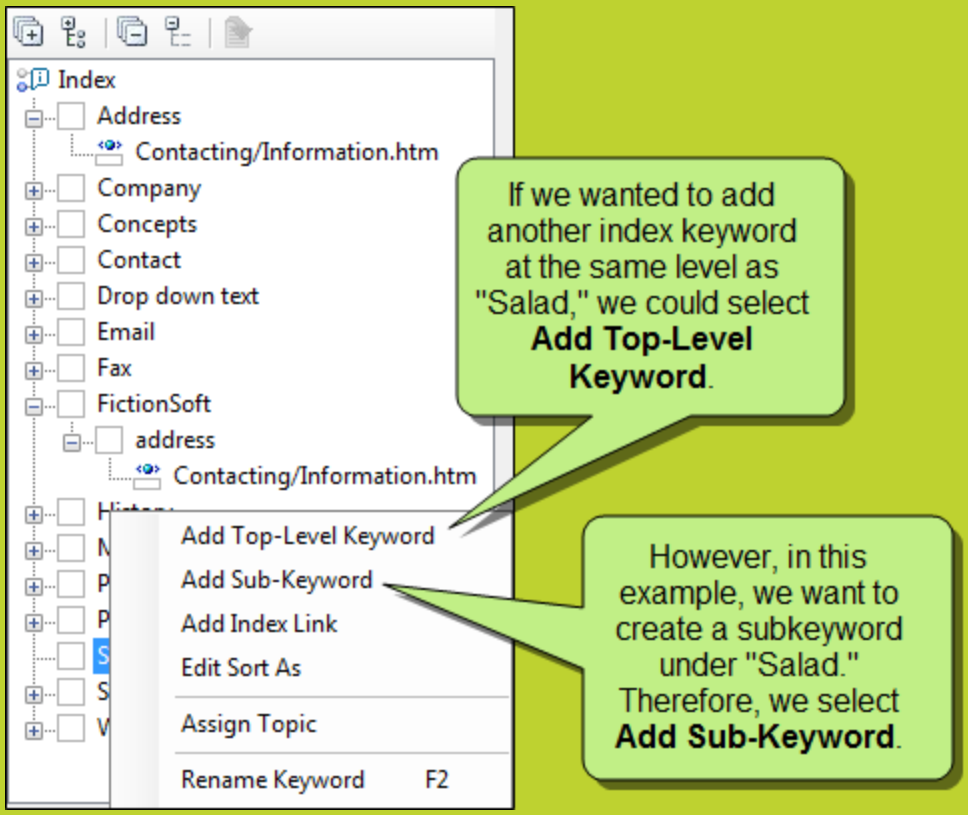
E X A M P L E

Let's say you want to add the index keyword "Salad" to some topics in your project. One way to accomplish this is to open those topics and insert the index keyword into them. Another way is to open the Index window pane, right-click anywhere in the explorer area at the bottom of the window pane, and select **Add Top-Level Keyword**.




Index
Address
Contacting/Information.htm
Company
Concepts
Contact
Drop down text
Email
Fax
FictionSoft
address
Contacting/Inform
History
Mission
Phone
Preview
Salad
Structure
What's New
After typing the new keyword, it appears with the rest of the index keywords. However, it is not yet associated with any topics.

Now let's say that you want to create a subkeyword called "Cobb" under the top-level keyword "Salad." First, you right-click on **Salad** and select **Add Sub-Keyword**.



Assigning Topics to Index Keywords

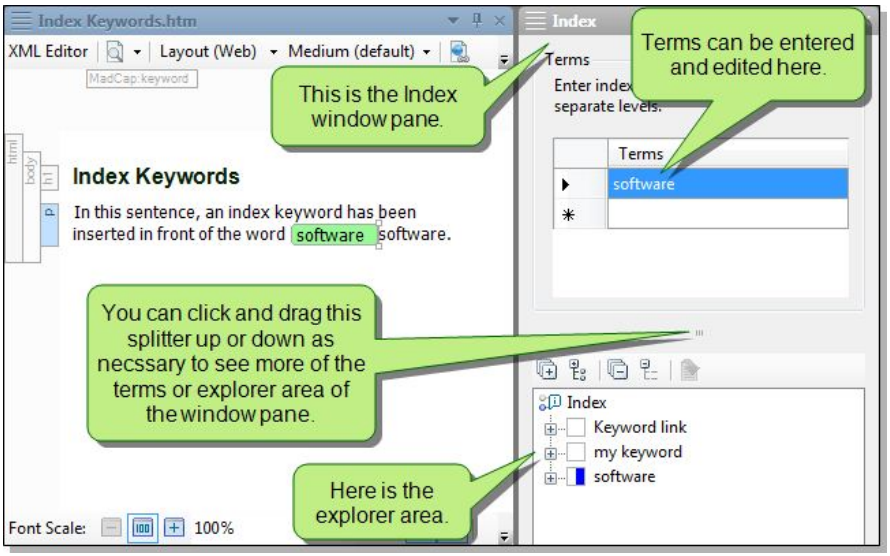
After you add index keywords or subkeywords in the Index window pane, you can assign topics to them. There are two methods for doing this.

- Context menu in Index window pane
- Drag from Content Explorer

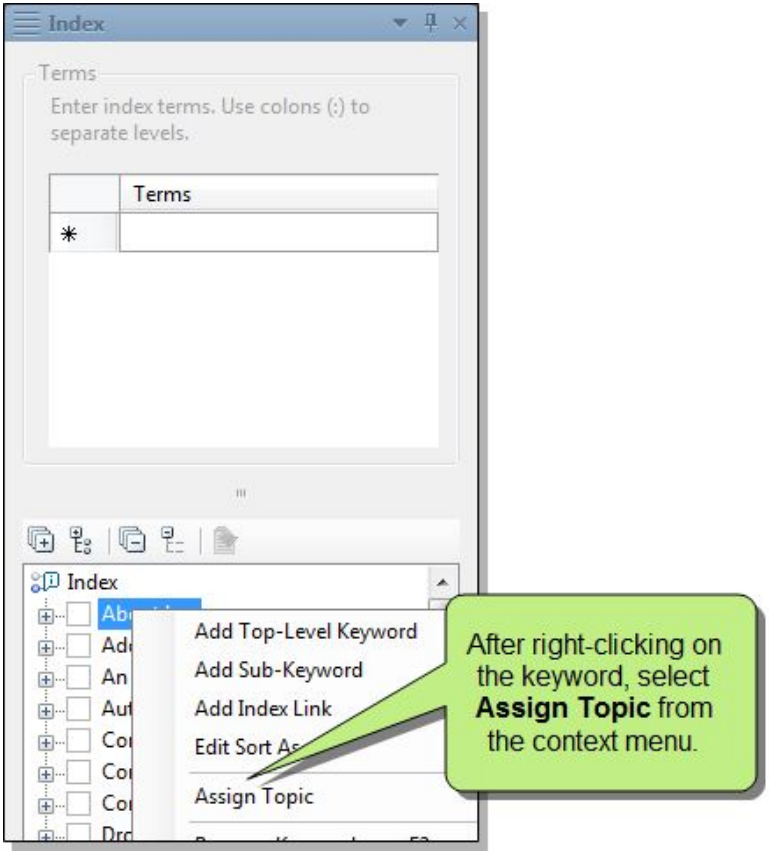
HOW TO ASSIGN TOPICS TO AN INDEX KEYWORD OR SUBKEYWORD—INDEX WINDOW PANE

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9**.

   The Index window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



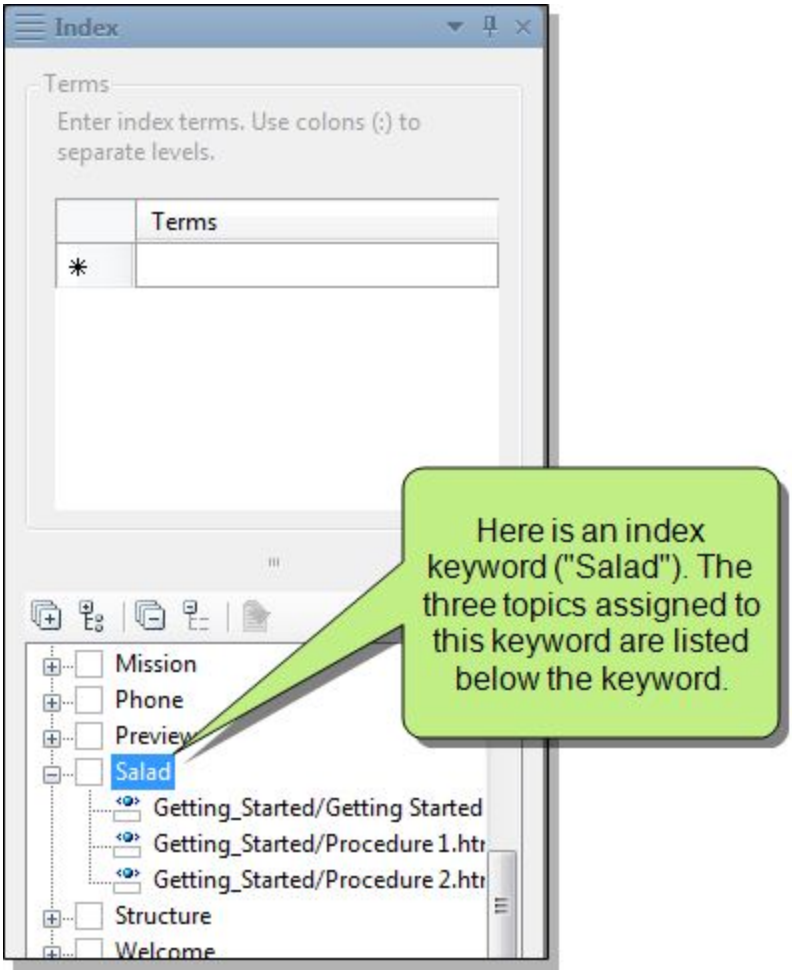
2. Right-click on the keyword or subkeyword and from the context menu select **Assign Topic**.



3. In the dialog that opens, find and select the topic(s).

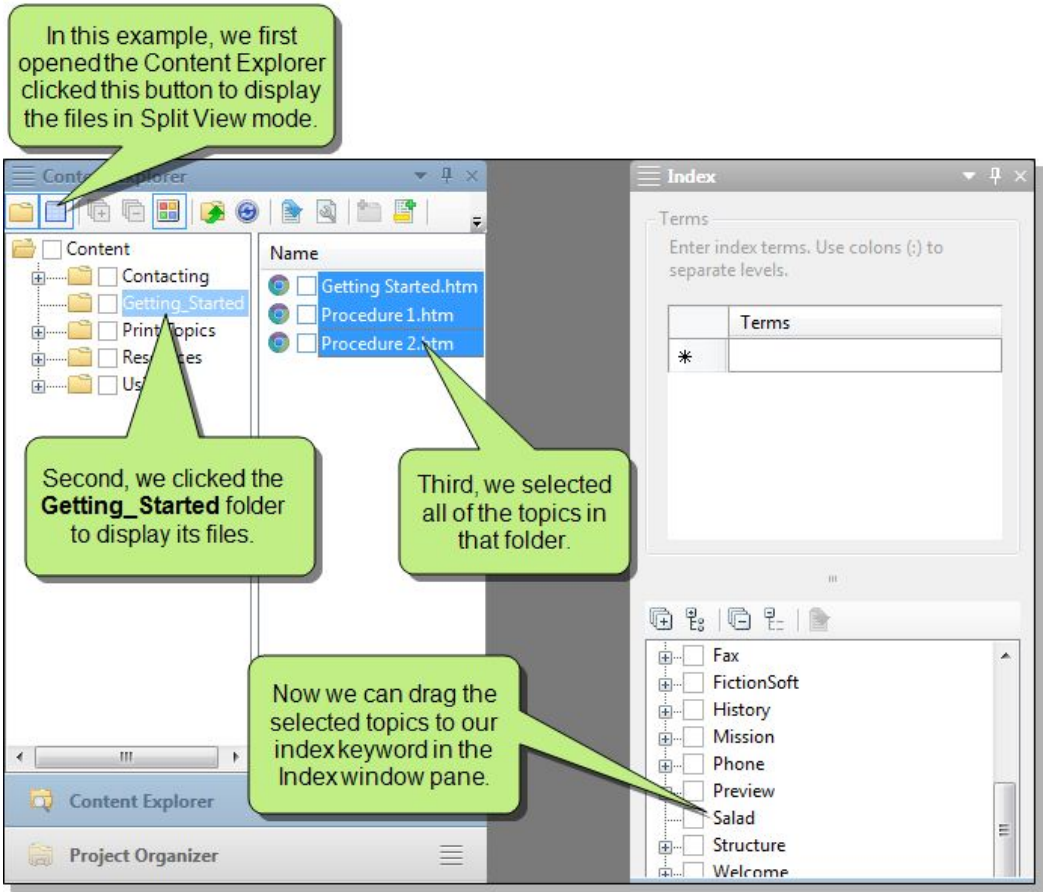
   If you want to select multiple topics, first click in the local toolbar. Then double-click the folder holding the files. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

4. In the dialog, click **Open**. Paths to the selected topics are displayed in the Index window pane after the keyword. And an index marker is added at the beginning of each topic.



HOW TO ASSIGN TOPICS TO AN INDEX KEYWORD OR SUBKEYWORD—CONTENT EXPLORER

1. Make sure the Content Explorer is open.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9**.
3. In the local toolbar of the Content Explorer, click the **Show Files** button. The window pane splits into left and right halves.
4. In the left half of the Content Explorer, click the folder holding the topics that you want to assign to an index keyword.
5. In the right half of the Content Explorer, select the topics. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
6. Drag the selected topics and drop them on the index keyword or subkeyword that is displayed the bottom (explorer) portion of the Index window pane.


In this example, we first opened the Content Explorer clicked this button to display the files in Split View mode.
Content
Contacting
Getting_Started
Name
Getting Started.htm
Procedure 1.htm
Procedure 2.htm
Second, we clicked the **Getting_Started** folder to display its files.
Third, we selected all of the topics in that folder.
Now we can drag the selected topics to our index keyword in the Index window pane.
Index
Terms
Enter index terms. Use colons (:) to separate levels.
Terms
Fax
FictionSoft
History
Mission
Phone
Preview
Salad
Structure
Welcome
Content Explorer
Project Organizer

Inserting Index Keywords

There are a few different ways to insert an index keyword into a topic or snippet, and each has its own advantages.

- Drag-and-drop
- Quick term
- Index window pane
- Index entry mode

Does it matter where you insert an index keyword in a topic? Typically, you want to insert the index keyword at the location closest to where the subject is discussed. One reason for this is to keep index keywords accurate in print-based output. Let's say you have a very long topic that discusses many subjects and you have inserted all of the index keywords at the top of the topic. In print-based output it is likely that the topic will be spread out to multiple pages. With the index keywords inserted at the top of the topic, the final index will point to the first printed page containing that topic, rather than the exact page where the subject is discussed. However, it is also helpful to insert keywords to your headings in a topic. This helps improve search results.

Drag-and-Drop Method

Use this method to quickly insert an index keyword that already exists in your project.

- **Advantage** It is extremely fast.
- **Disadvantage** The index keyword that you want to insert must already exist in the project. This means you must first insert the index keyword into a topic using one of the other methods.

HOW TO INSERT AN INDEX KEYWORD USING THE DRAG-AND-DROP METHOD

1. Open the content file (e.g., topic, snippet).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9**.
3. In the bottom (explorer) area of the Index window pane, click the index keyword and drag it to the location in the topic or snippet where you want to insert it. As you drag the keyword into the topic or snippet, a vertical red bar acts as a guide to help you place the keyword.

   The index keyword is displayed within a marker in front of the word where you added it (as long as markers are turned on).
4. Click to save your work.

Quick Term Method

Use this method to quickly insert the first word located after your cursor as an index keyword.

- **Advantage** It is extremely fast.
- **Disadvantage** It is not the method to use if you want to customize your phrase or add a second-level keyword. The word located immediately after the cursor is exactly what will be displayed in the index.

HOW TO INSERT AN INDEX KEYWORD USING THE QUICK TERM METHOD

1. Open the content file (e.g., topic, snippet).
2. Click before or on the word that you want to insert as an index keyword.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Links** section select **Keyword**.
   - **Menu** Select **Tools>Index>Insert [term] as Index Keyword**.
   - **Keyboard Shortcut** Press **F10** on your keyboard.

   The index keyword is displayed within a marker in front of the word where you added it (as long as markers are turned on).
4. Click to save your work.

Index Window Pane Method

Use this method to enter a keyword in the Index window pane.

- **Advantage** It lets you customize the wording of the phrase in the index. It also lets you add a second-level index keyword.
- **Disadvantage** It is not quite as fast as the other methods.

HOW TO INSERT AN INDEX KEYWORD USING THE INDEX WINDOW PANE METHOD

1. Open the content file (e.g., topic, snippet).
2. Click at the location in the topic or snippet where want to insert an index keyword.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9** on your keyboard.

   The Index window pane opens.

   The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.
4. Click in an empty field in the **Terms** column.
5. Type the index keyword as you want it to appear in the index.

   If you want to add a second level to the keyword, type a colon after the first term, and then type the second term.

   E X A M P L E

   If you type `Software:MadCap Flare`, the keyword "Software" appears at the first level of the index, and the term "MadCap Flare" appears as a subentry under "Software."

> **Note:** If you want to add a keyword that begins with a colon, you need to type a backwards slash \ first, followed by the colon and then the term (e.g., \:My keyword). If you want to add a subkeyword that starts with a colon, you can do the same, although you still need to include the original colon that indicates it is a subkeyword (e.g., My keyword:\:mysubkeyword).

6. Press **Enter**.

   The index keyword is displayed within a marker in front of the word where you added it (as long as markers are turned on).

7. Click to save your work.

Index Entry Mode Method

Use this method to accomplish the same thing as the Index window pane method. The difference is that, with this method, you do not need to move your cursor from the topic or snippet to the Index window pane. You simply click at the spot in the text where you want to insert the keyword and start typing. The words you type are added directly into the Index window pane. This is a good method to use if you plan to do a lot of indexing all at once, without performing any other tasks in the topic or snippet.

- **Advantage** It is extremely fast and allows you to customize phrasing and add second-level keywords.
- **Disadvantage** It is not the best method to use if you want to perform indexing while also adding other content and formatting to topics or snippets.

HOW TO INSERT AN INDEX KEYWORD USING THE INDEX ENTRY MODE METHOD

1. Open the content file (e.g., topic, snippet).
2. In the local toolbar of the XML Editor click . The cursor changes, displaying a small boxed "i" next to it.
3. Click at the place in your topic where you want to add an index keyword.
4. Type the phrase that you want to add as the index keyword.

   As you start typing, the Index window pane opens (if it was not previously opened), and the phrase is added to the first empty field under the Terms column.

   If you want to add a second level to the index keyword, type a colon after the first term, and then type the second term.
5. Press **Enter**. The index keyword is displayed within a marker in front of the word where you added it (as long as markers are turned on).
6. If you want to add more index keywords in the topic, repeat Steps 3-5.
7. Click to save your work.

Note: If you want to turn off the index entry mode and return to regular editing, click again.

Creating Auto-Indexes

Auto-indexes let you automatically add words in your project to a generated index, rather than inserting all of the index markers manually. To do this, you can add phrases and corresponding index entries to an auto-index file. When you generate the output, Flare scans the auto-index file and adds the words it finds to the generated index.

EXAMPLE

Let's say that you want to make sure that the word "Pasta" appears in your generated index, containing links to all of the topics where that word is found. Your first option is to manually insert the "Pasta" index marker into all of those topics. Your second option is to add the word "Pasta" to an auto-index file. When you generate the output, Flare automatically creates index entries and links for the words and phrases in your auto-index file, including the word "Pasta."

HOW TO CREATE AN AUTO-INDEX

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Advanced>Auto-index Phrase Set**.
   - **Menu** Select **Project>Advanced>Add Auto-index Phrase Set**.
   - **Right-Click** In the Project Organizer, right-click on the **Advanced** folder and from the context menu select **Add Auto-index Phrase Set**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Auto-index Phrase Set** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the Project Organizer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.
5. In the **File Name** field, provide a name for the auto-index phrase set file.
6. Click **Add**. The Auto-index Editor opens. Also, the auto-index file (.flaix extension) is added to the Advanced folder in the Project Organizer. In the future, you can open the auto-index phrase set from there.
7. For each phrase in your project that you want to be automatically converted to a particular index entry, complete the following steps in the Auto-index Editor:

a. In the local toolbar, click . The Properties dialog opens and a new row is added to the editor.

b. In the **Phrase** field, type the word(s) that you want Flare to find in your project and use as the basis for a new index entry. Please note that the fields in this dialog are case-sensitive; therefore, if you enter a phrase with the initial word capitalized, only occurrences just like that in your topics will be used to create index entries.

c. In the **Index Term** field, enter the word(s) to be added to the generated index. To create a multi-level index entry, separate the first-level term and the second-level term with a colon.

E X A M P L E S

Let's say that you entered `pasta` in the Phrase field and `Pasta` in the Index Term field. In that case, the generated index in the print-based output will display like this:

P

Pasta 1, 3-4

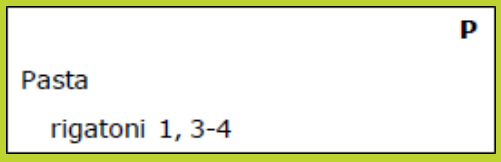
The index entry points to any topics where the lowercase instance of "pasta" has been found. If you also want the index entry to point to occurrences where the word is not all lowercase ("Pasta"), add another row to the Auto-Index Editor and create a phrase for it (i.e., enter `Pasta` in both the Phrase field and the Index Term field).

Let's say that your project talks about many kinds of pasta and you want to create multiple index entries for certain words, some with single-level entries and others with sublevels. Maybe you want Flare to scan the project for "rigatoni." When it finds occurrences, you might want a single-level index entry like this:

R

Rigatoni 1, 3-4

In that case, you would enter `rigatoni` in the Phrase field and `Rigatoni` in the Index Term field. That index entry would point to all of instances of "rigatoni" in the project. But you also might want a multi-level index entry displayed like this:



In that case, you would enter `rigatoni` in the Phrase field and `Pasta:rigatoni` in the Index Term field.

d. Click **OK**.

8. Click to save your work.

Note: For print-based outputs, you can also use an option to auto-generate indexes for the output. See "Auto-generating Indexes for Print" on page 129.

Creating Index Links

This feature is supported in all outputs.

In addition to creating regular index entries that point to a specific place in your project, you can also create index links. An index link is an entry in a generated index that points to another entry. There are three kinds of index links—"See," "See Also," and "Sort As."

EXAMPLE—SEE LINK

Let's say that you have written several topics about dogs, and in each of those topics you have inserted an index marker labeled "Dogs." Therefore, when users look in the index under "Dogs," they will be able to quickly find any of those topics. But what if users do not look under "Dogs," but rather "Canines"?

There are a couple of options to solve the problem. First, you could add index markers labeled "Canines" in all of those topics. A second option is to create an index "see" link for "Canines" that points users to "Dogs." In the output, it might look something like this:

C

Canines See **Dogs**

EXAMPLE—SORT AS LINK

Let's say you add <html> as an index keyword. Normally, without the "Sort as" feature, the keyword would be placed at the top of the index list, before the alphabetized keywords.

Here is the <html> index keyword in PDF output, without the "sort as" feature being used. Because of the angle bracket, the keyword is displayed at the top of the list.

Index

<

<html> 2

A

Address 9

C

Company 9

Concepts 3

Contact 9

Address 9

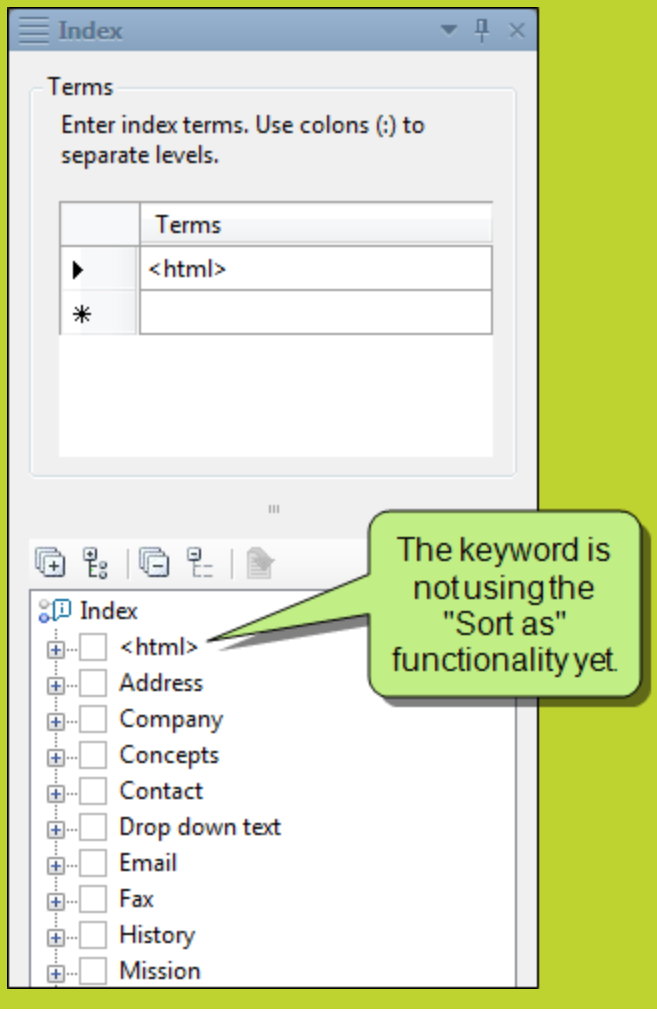
Email 9

Phone 9

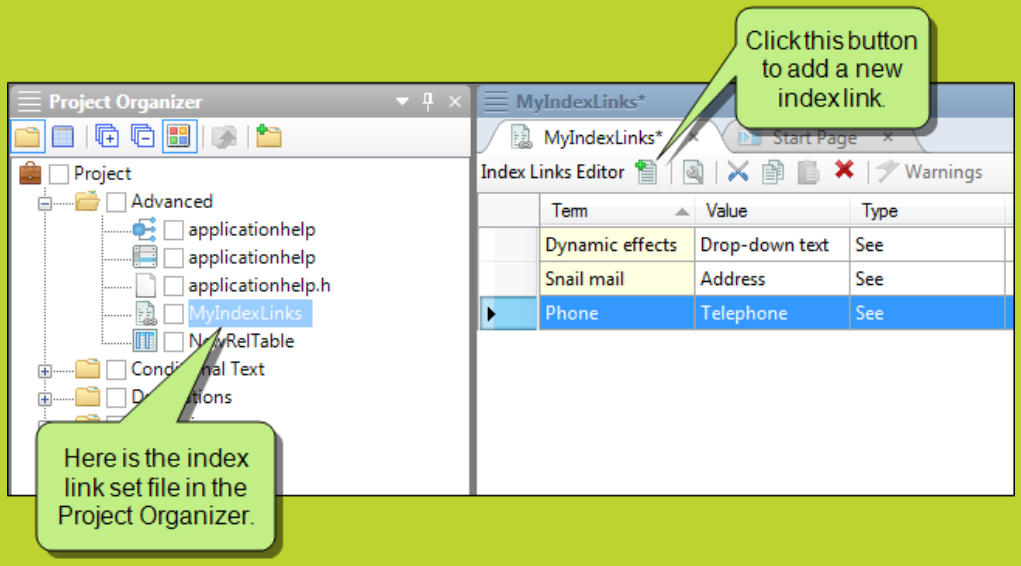
D

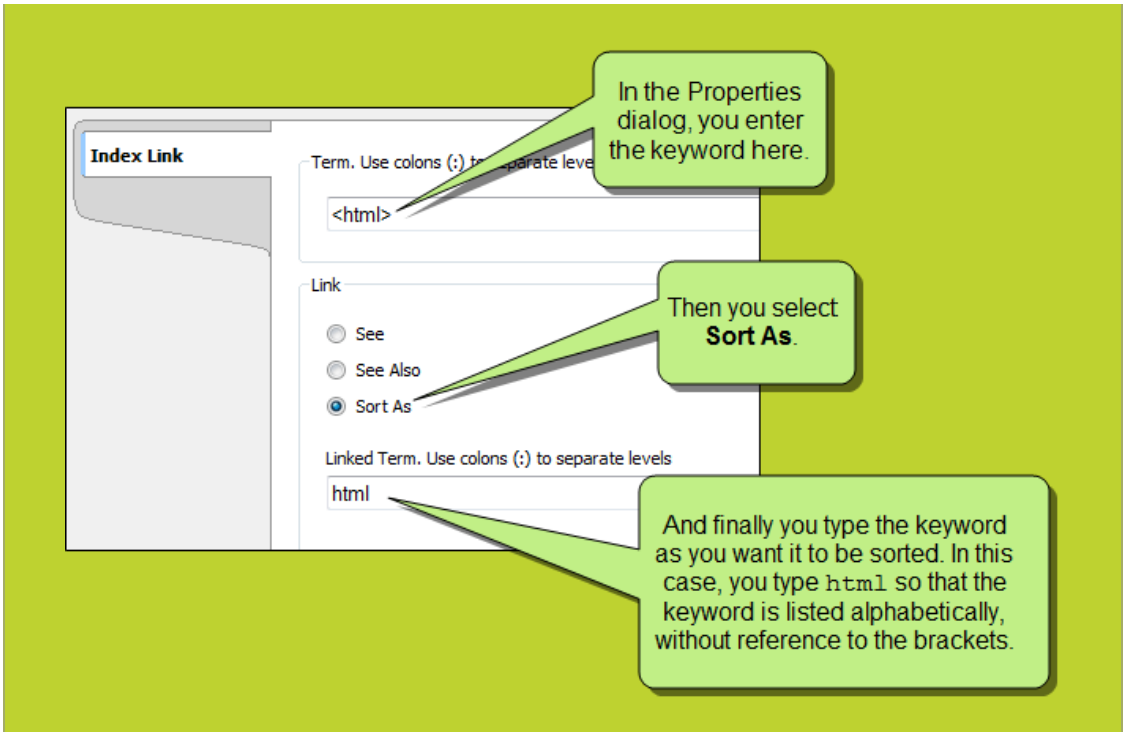
Drop down text 2

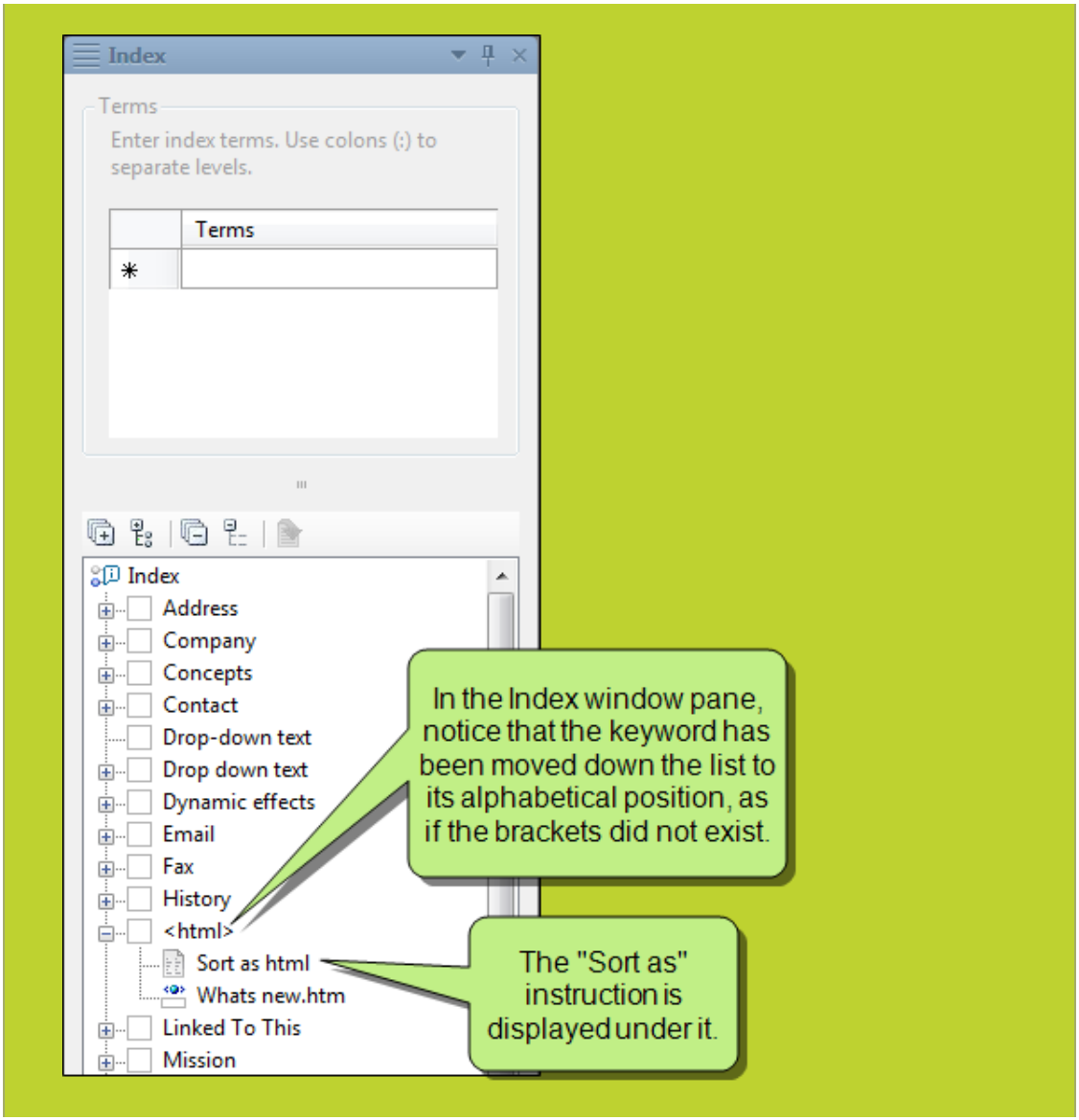
This occurs not only in the output, but also in the Index window pane in your project.

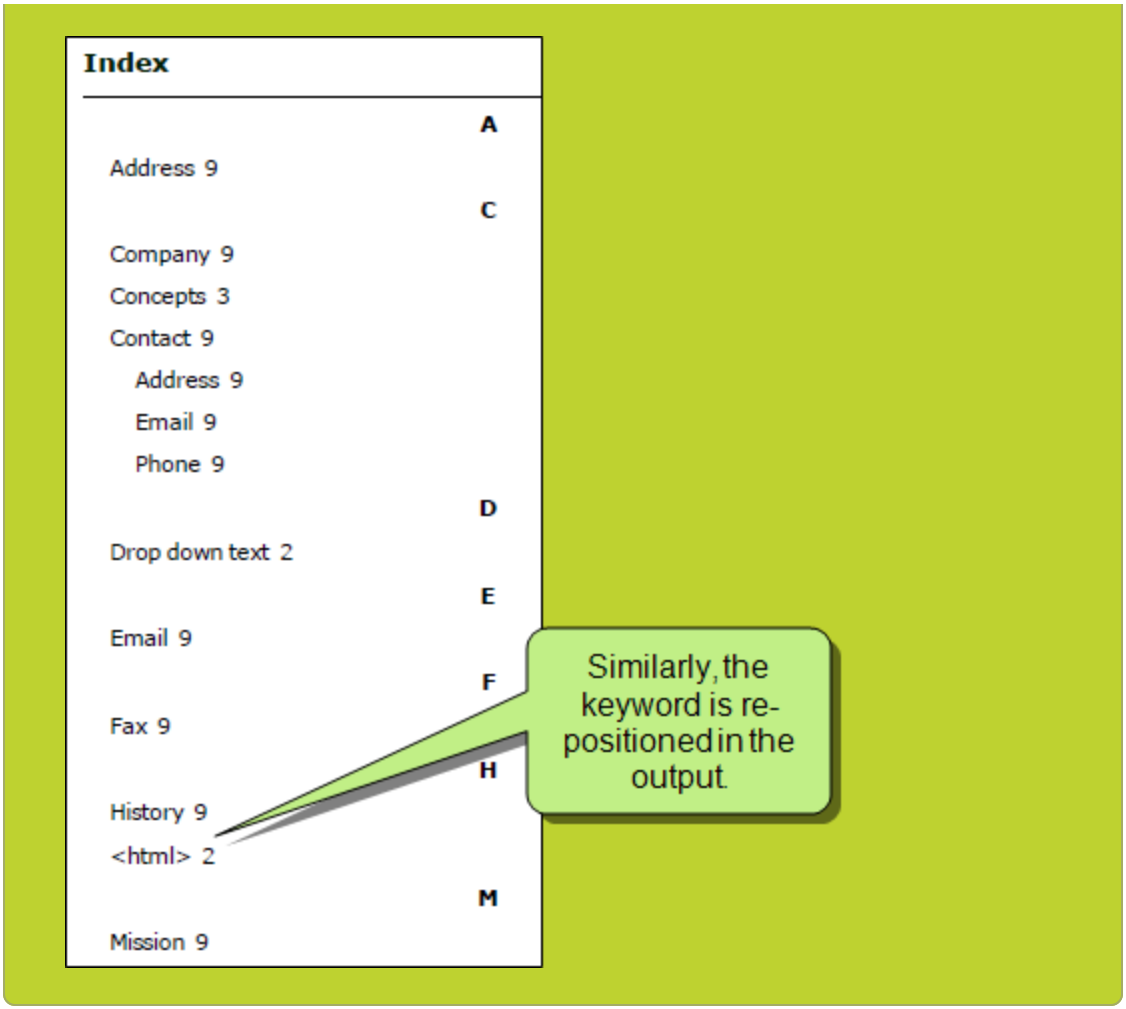


After adding an index link set file—which is stored in the Advanced folder in the Project Organizer—you can create a new index link for this keyword in the Index Links Editor.




Index Link
Term. Use colons (:) to separate levels
<html>
Link
See
See Also
Sort As
Linked Term. Use colons (:) to separate levels
html
In the Properties dialog, you enter the keyword here.
Then you select **Sort As**.
And finally you type the keyword as you want it to be sorted. In this case, you type `html` so that the keyword is listed alphabetically, without reference to the brackets.


Index
Terms
Enter index terms. Use colons (:) to separate levels.
Terms
Index
Address
Company
Concepts
Contact
Drop-down text
Drop down text
Dynamic effects
Email
Fax
History
<html>
Sort as html
Whats new.htm
Linked To This
Mission
In the Index window pane, notice that the keyword has been moved down the list to its alphabetical position, as if the brackets did not exist.
The "Sort as" instruction is displayed under it.


Index
A
Address 9
C
Company 9
Concepts 3
Contact 9
Address 9
Email 9
Phone 9
D
Drop down text 2
E
Email 9
F
Fax 9
H
History 9
<html> 2
M
Mission 9
Similarly, the keyword is re-positioned in the output.

You can create index links in the following ways.

HOW TO CREATE INDEX LINKS USING THE INDEX LINKS EDITOR

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Advanced>Index Link Set**.
   - **Menu** Select **Project>Advanced>Add Index Link Set**.
   - **Right-Click** In the Project Organizer, right-click on the **Advanced** folder and from the context menu select **Add Index Link Set**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Index Link Set** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     Note: In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.
   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the Project Organizer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.
5. In the **File Name** field, provide a name for the index link set file.
6. Click **Add**. The Index Links Editor opens. Also, the index link file (.flixl extension) is added to the Advanced folder in the Project Organizer. In the future, you can open the index link set from there.
7. For each index link that you want to create for a particular term, complete the following steps in the Index Links Editor.
   a. In the local toolbar, click . The Properties dialog opens and a new row is added to the editor.
   b. In the **Term** field, type the term that you anticipate users may look for in the generated index. Please note

that the fields in this dialog are case-sensitive; therefore, if you enter a term in all lowercase letters, that is how it will be displayed in the output.

If you want to create a multi-level index entry, separate the first-level term and the second-level term with a colon (e.g., a single-level entry might be "Pasta"; a multi-level entry might be "Pasta:rigatoni").

c. Select a link type—**See**, **See Also**, or **Sort As**.

Use a "See" link if the term in question does not exist in the project as an index marker. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *instead of* the one originally sought. You can enter one "See" link per term.

Use a "See Also" link if the term in question does exist as an index marker somewhere in the project. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *in addition to* the one originally sought. You can create as many "See Also" links for a term as you like.

Use a "Sort As" link if you want to sort an index keyword as something else. This can be useful when a keyword begins with a symbol or an accented variety of a letter (e.g., place <html> in the "h" section, instead of at the top of the index).

d. In the **Linked Term(s)** field, enter the existing index entry that you want users to look for, or the term as you want it to be sorted in the list. If you want to create a multi-level index entry, separate the first-level term and the second-level term with a colon.

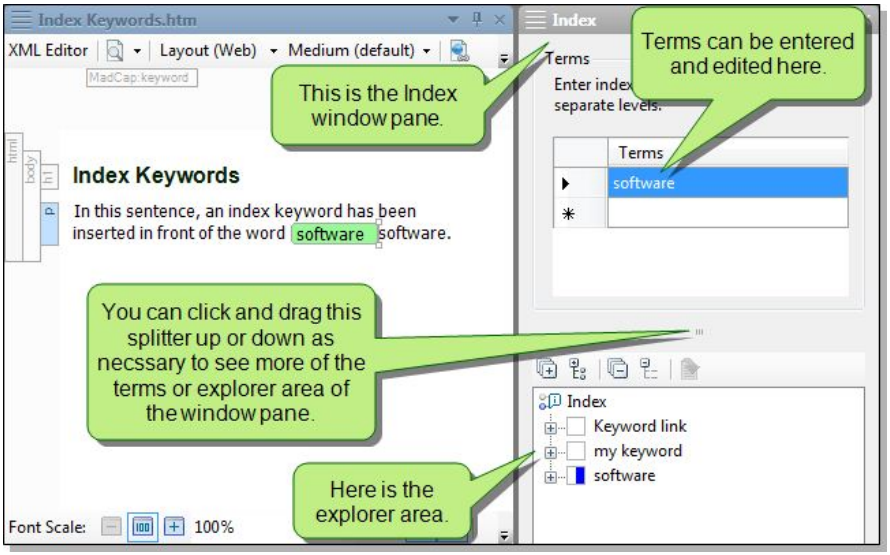
e. Click **OK**.

8. Click to save your work.

HOW TO CREATE INDEX LINKS USING THE INDEX WINDOW PANE

1. Do one of the following:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9** on your keyboard.

   The Index window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



2. Right-click in the explorer area at the bottom of the window pane, and from the context menu select **Add Index Link**.

> **Note:** In order to see this option in the context menu, you must already have at least one entry in the index. Also, the option is not displayed if you right-click on the root Index heading; you must right-click below it.

3. If you do not yet have an index link set in your project, the Add Index Link Set dialog opens; continue with the next step.

   If you already have an index link set in your project, skip to step 9. The index links you create at this point will be added to the first index link set listed in the Advanced folder of the Project Organizer (if there is more than one index link set).

4. In the **Source** area select one of the following:

   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     Note: In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

   - **New from existing** This lets you 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 the browse button ..., use the Open File dialog to find a file, and double-click it.

5. (Optional) If you want to place the file into a subfolder that you previously created in the Project Organizer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.

6. In the **File Name** field, provide a name for the index link set file.

7. Click **Add**.

8. Click **OK**. The Properties dialog opens. In addition, the Index Links Editor opens. Finally, the index link file (.flixl extension) is added to the Advanced folder in the Project Organizer. In the future, you can open the index link set from there.

9. In the **Term** field, type the term that you anticipate users may look for in the generated index. Please note that the fields in this dialog are case-sensitive; therefore, if you enter a term in all lowercase letters, that is how it will be displayed in the output.

   If you want to create a multi-level index entry, separate the first-level term and the second-level term with a colon (e.g., a single-level entry might be "Pasta"; a multi-level entry might be "Pasta:rigatoni").

10. Select a link type—**See**, **See Also**, or **Sort As**.

    Use a "See" link if the term in question does not exist in the project as an index marker. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *instead of* the one originally sought. You can enter one "See" link per term.

    Use a "See Also" link if the term in question does exist as an index marker somewhere in the project. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *in addition to* the one originally sought. You can create as many "See Also" links for a term as you like.

    Use a "Sort As" link if you want to sort an index keyword as something else. This can be useful when a keyword begins with a symbol or an accented variety of a letter (e.g., place <html> in the "h" section, instead of at the top of the index).

11. In the **Linked Term(s)** field, enter the existing index entry that you want users to look for, or the term as you want it to be sorted in the list. If you want to create a multi-level index entry, separate the first-level term and the second-level term with a colon.

12. Click **OK**.

13. Click to save your work.

HOW TO CREATE INDEX LINKS WHEN INSERTING INDEX MARKERS

1. Open the content file (e.g., topic, snippet).
2. Click at the location in the topic where want to insert an index keyword.
3. Do one of the following:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Index Window**.
   - **Menu** Select **View>Index Window**.
   - **Keyboard Shortcut** Press **F9** on your keyboard.

   The Index window pane opens.
4. Click in an empty field in the **Terms** column.
5. Type the index link using one of the following formats, depending on whether you want to create a "See," "See Also," or "Sort As" link:

   ```
   {nopage}My Entry{see}Linked Entry
   ```

   ```
   {nopage}My Entry{seealso}Linked Entry
   ```

   ```
   {nopage}My Entry{sortas}Linked Entry
   ```

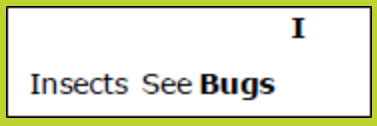
   Use a "See" link if the term in question does not exist in the project as an index marker. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *instead of* the one originally sought. You can enter one "See" link per term.

   Use a "See Also" link if the term in question does exist as an index marker somewhere in the project. The idea is that, if a user looks for that term in the index, you want to point the person to a different term *in addition to* the one originally sought. You can create as many "See Also" links for a term as you like.

   Use a "Sort As" link if you want to sort an index keyword as something else. This can be useful when a keyword begins with a symbol or an accented variety of a letter (e.g., place <html> in the "h" section, instead of at the top of the index).

EXAMPLE

Let's say that you want to see this in the output:



In that case, you would type this in the Index window pane:

{nopage}Insects{see}Bugs

If you want to add a second level to either index keyword, type a colon after the first term, and then type the second term.

6. Press **Enter**. The index keyword link is displayed within a marker in front of the word where you added it (as long as markers are turned on).
7. Click to save your work.

Note: The option to create index links when inserting index markers is not supported in Microsoft Word or Adobe FrameMaker output.

Note: The option to create "Sort As" links is available only in Adobe PDF and Microsoft XPS outputs.

Note: You also may want to use styles to change the look of the index links. For example, you might want to make sure that the link term is displayed in bold to make it stand out. For more information about using styles, including steps, see the online Help or the Flare *Styles Guide*.

Auto-generating Indexes for Print

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

To create a generated index in print output, you can let Flare auto-generate one for you, or you can create a unique topic and insert an index proxy into it (see "Creating an Index Manually for Print" on page 143).

The following explains how to auto-generate an index.

HOW TO AUTO-GENERATE AN INDEX

1. Open a target.
2. On the **Advanced** tab of the Target Editor, select **Generate Index Proxy**.

   Note: This option is disabled by default for existing targets, but enabled for new targets. If an index proxy is already present in a topic or snippet that is being included in the output, this auto-generate option has no effect.

3. Click to save your work.

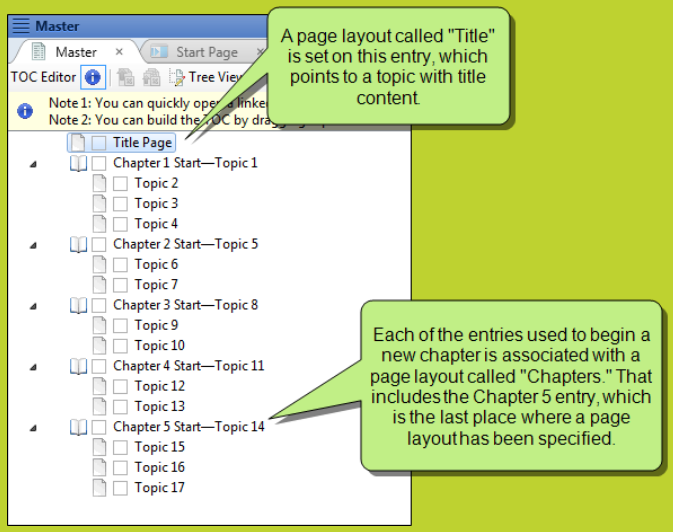
When you generate the target, an index will be created and inserted after all of the other content, as well as after an auto-generated glossary, if you include one.

WHICH PAGE LAYOUT IS USED?

If a TOC, index, or glossary is auto-generated, how does Flare know which page layout to use for them in the output? It uses the same page layout that is being used for the topic(s) just before it.

E X A M P L E

Let's say you have an outline TOC set up like this:



In this case, the generated TOC is going to be placed directly after the title page. It will use the "Title" page layout which is set on the first "Title Page" entry. That page layout has a Title page type in it. That's how Flare knows it should place the TOC directly after it and to use the same page layout to display the TOC.

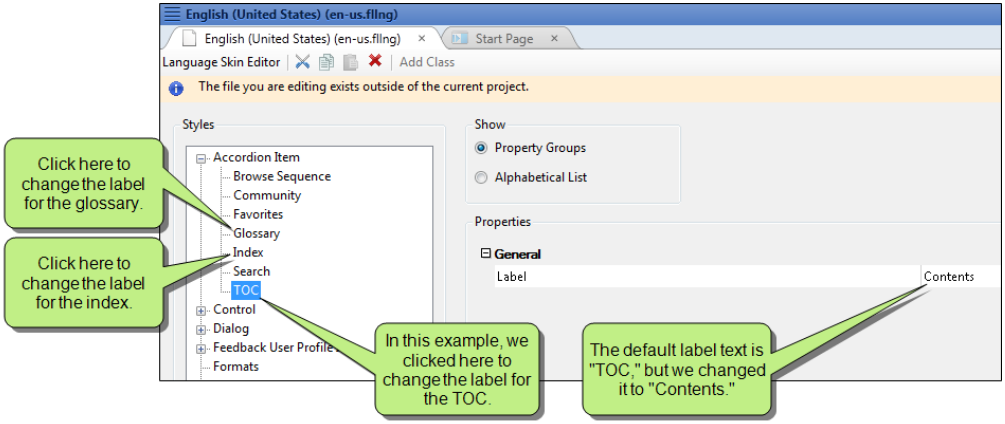
The generated glossary is going to be placed after the final entry, called "Topic 17," and the generated index will be placed after the glossary. Both of these will use the "Chapters" page layout, because it's the last one that was set.

AUTO-GENERATE VERSUS MANUAL PROXIES

The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.

EDITING ATTRIBUTES FOR GENERATED TOCS, INDEXES, AND GLOSSARIES

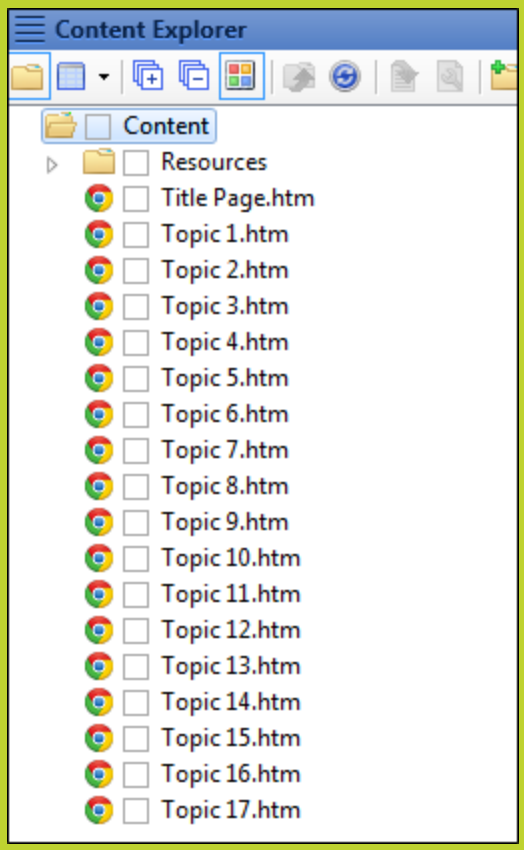
You can change the heading text for each of these auto-generated proxies in the language skin.



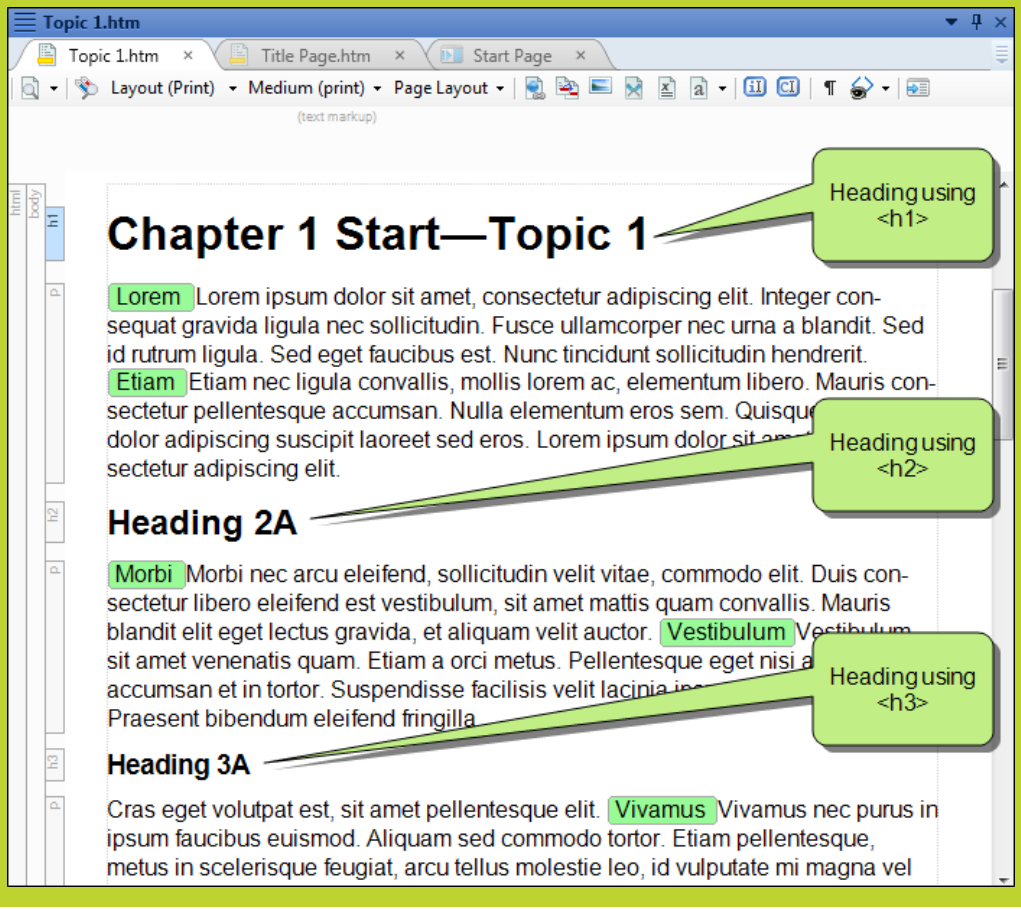
All other attributes for the generated glossary, index, and TOC can be controlled in your stylesheet.

E X A M P L E

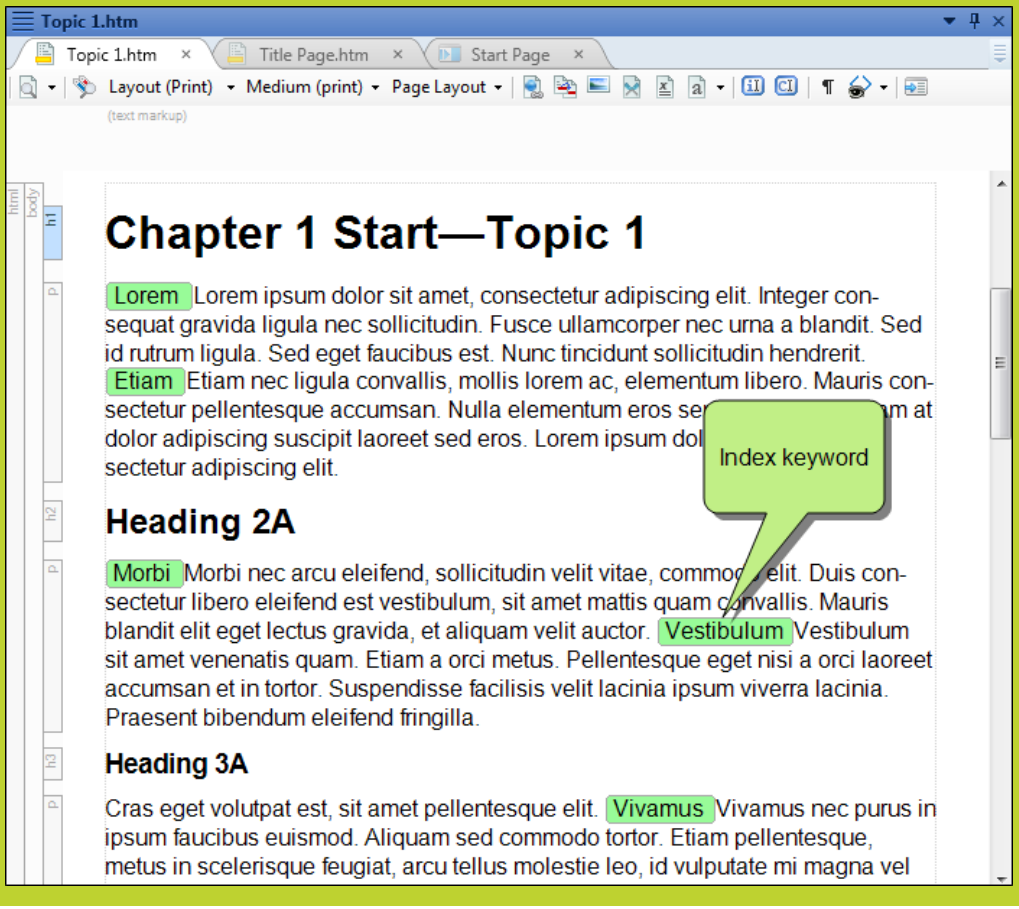
Let's say you need to create a PDF manual with five short chapters. You've created 17 topics that will make up those five chapters, and you've created a separate topic for a title page.



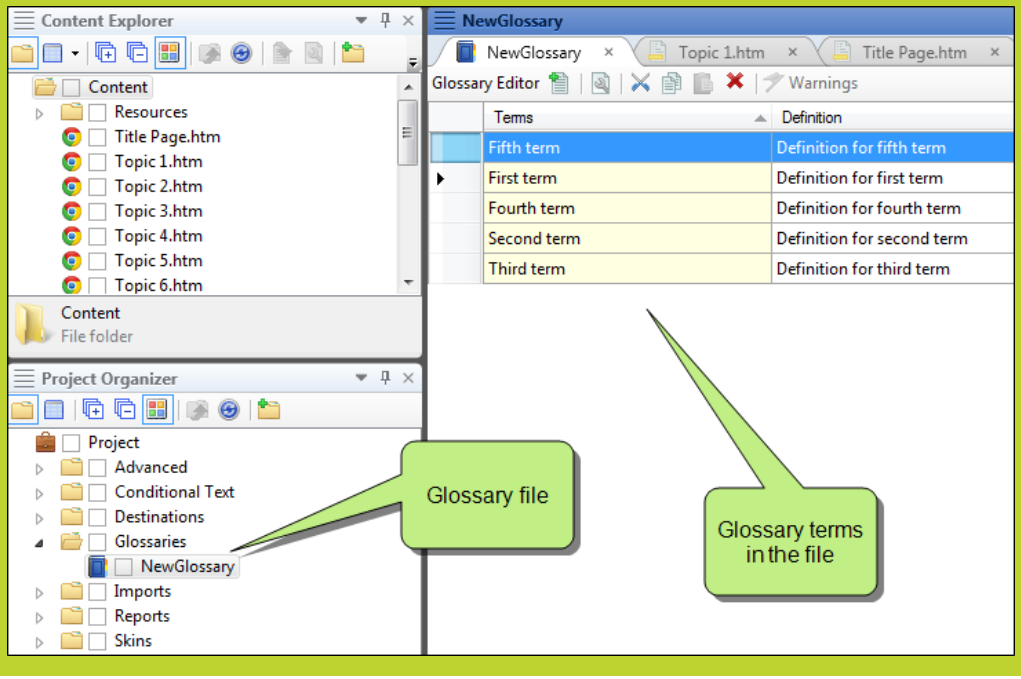
Your topics use <h1>, <h2>, and <h3> tags. These will become important when the TOC is generated.

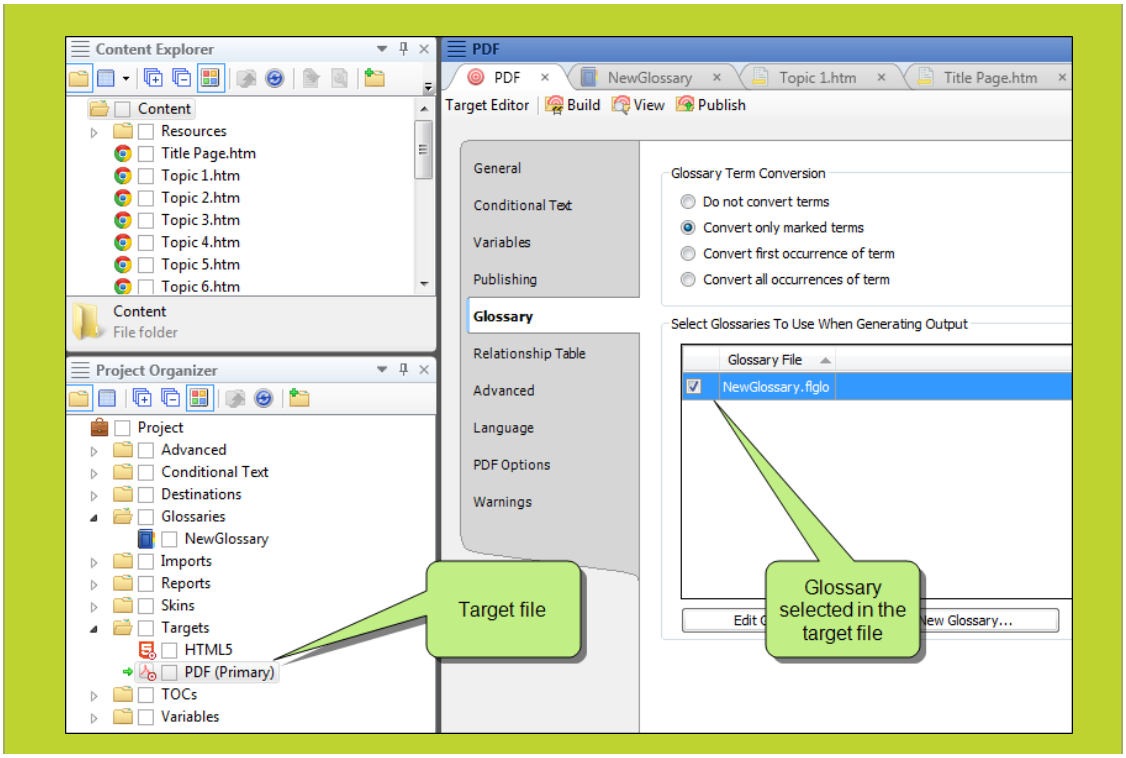


You've inserted index keywords throughout the topics. These will become important when the index is generated.

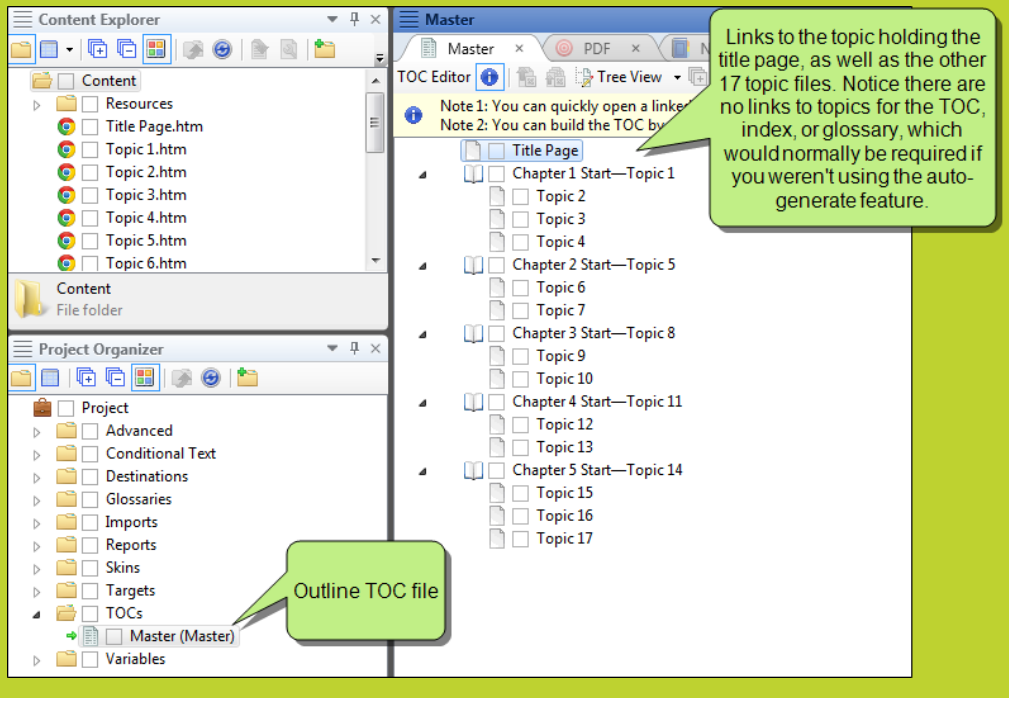


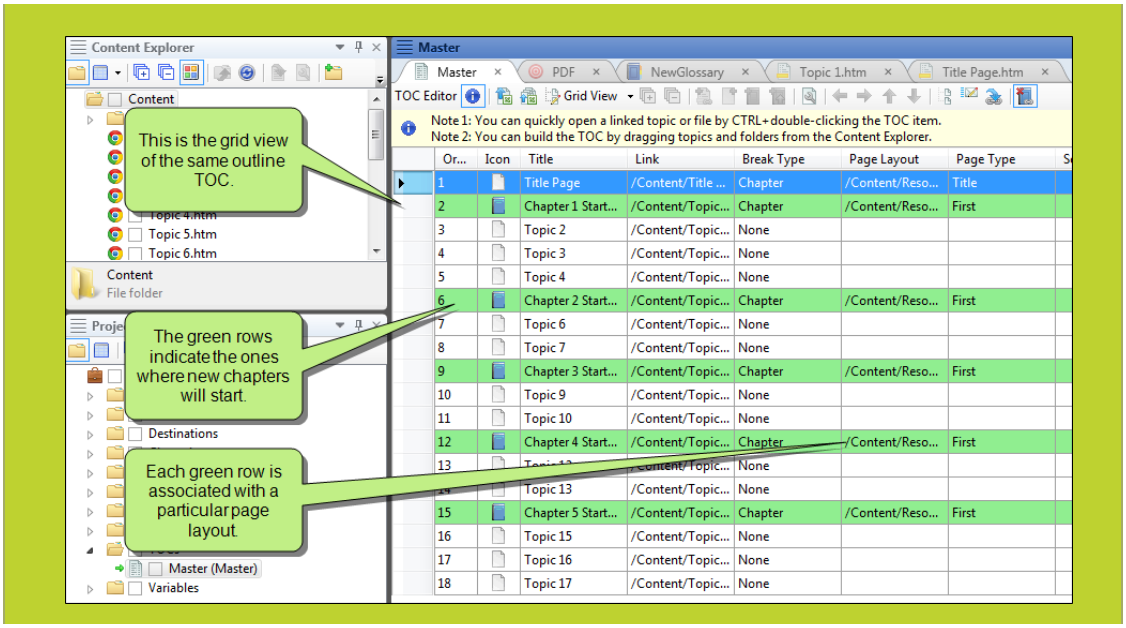
You've created a glossary file and associated it with the PDF target you're going to use. This will become important when the glossary is generated.



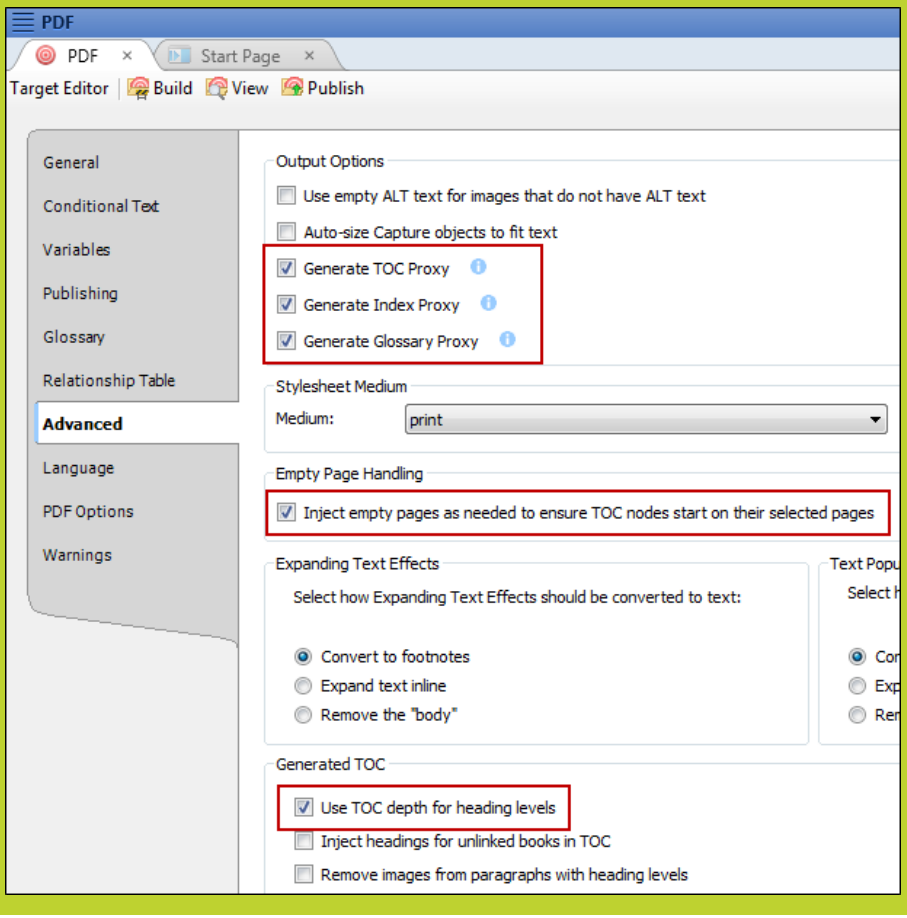

Content Explorer
Content
Resources
Title Page.htm
Topic 1.htm
Topic 2.htm
Topic 3.htm
Topic 4.htm
Topic 5.htm
Topic 6.htm
Content
File folder
Project Organizer
Project
Advanced
Conditional Text
Destinations
Glossaries
NewGlossary
Imports
Reports
Skins
Targets
HTML5
PDF (Primary)
TOCs
Variables
PDF
PDF
NewGlossary
Topic 1.htm
Title Page.htm
Target Editor
Build
View
Publish
General
Conditional Text
Variables
Publishing
Glossary
Relationship Table
Advanced
Language
PDF Options
Warnings
Glossary Term Conversion
Do not convert terms
Convert only marked terms
Convert first occurrence of term
Convert all occurrences of term
Select Glossaries To Use When Generating Output
Glossary File
NewGlossary.fglo
Target file
Glossary selected in the target file

You've put all of your topics into an outline TOC file. You've associated your title topic with one page layout, and you've assigned a different page layout to the five topics that will serve as the starting point for each of the five chapters.

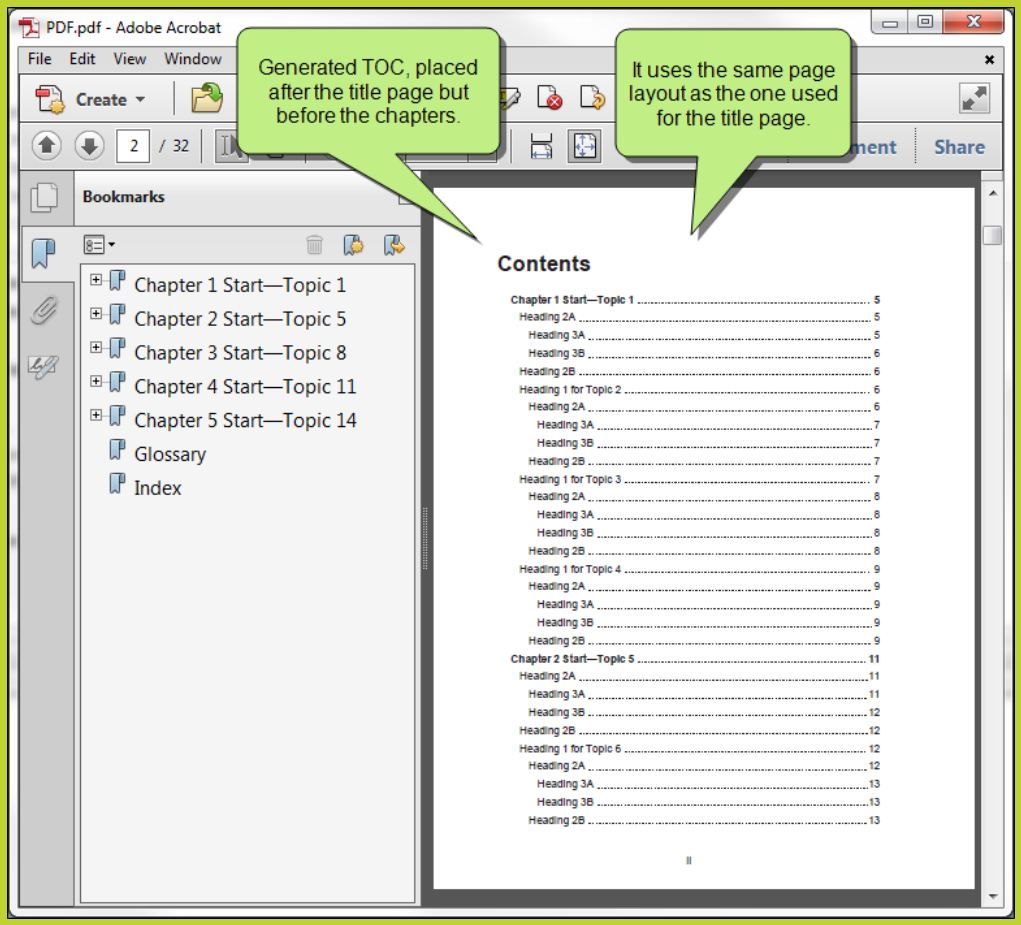


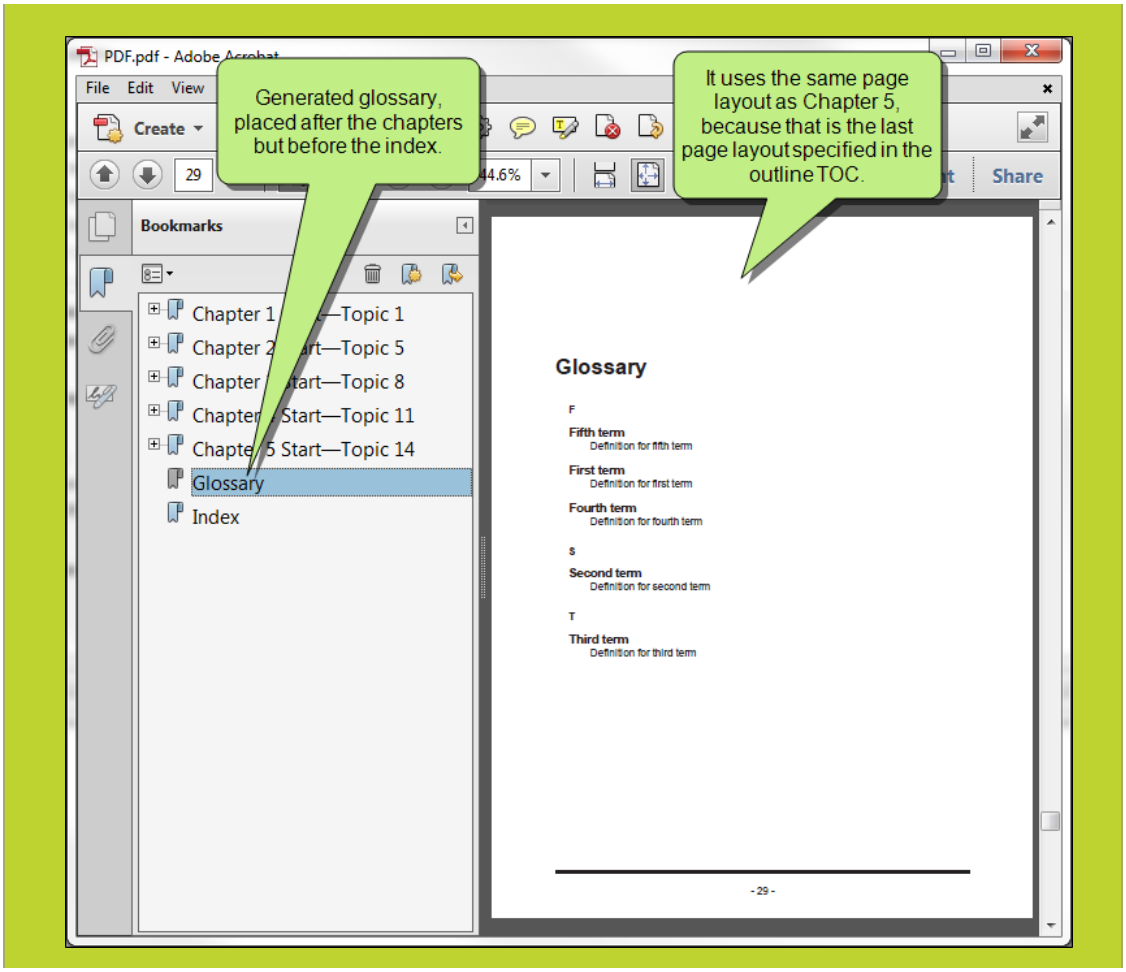

Content Explorer
Content
Topic 5.htm
Topic 6.htm
Content
File folder
Destinations
Master (Master)
Variables
This is the grid view of the same outline TOC.
The green rows indicate the ones where new chapters will start.
Each green row is associated with a particular page layout.
Master
Master
PDF
NewGlossary
Topic 1.htm
Title Page.htm
TOC Editor
Grid View
Note 1: You can quickly open a linked topic or file by CTRL+double-clicking the TOC item.
Note 2: You can build the TOC by dragging topics and folders from the Content Explorer.
Or... Icon Title Link Break Type Page Layout Page Type
1 Title Page /Content/Title ... Chapter /Content/Reso... Title
2 Chapter 1 Start... /Content/Topic... Chapter /Content/Reso... First
3 Topic 2 /Content/Topic... None
4 Topic 3 /Content/Topic... None
5 Topic 4 /Content/Topic... None
6 Chapter 2 Start... /Content/Topic... Chapter /Content/Reso... First
7 Topic 6 /Content/Topic... None
8 Topic 7 /Content/Topic... None
9 Chapter 3 Start... /Content/Topic... Chapter /Content/Reso... First
10 Topic 9 /Content/Topic... None
11 Topic 10 /Content/Topic... None
12 Chapter 4 Start... /Content/Topic... Chapter /Content/Reso... First
13 None
Topic 13 /Content/Topic... None
15 Chapter 5 Start... /Content/Topic... Chapter /Content/Reso... First
16 Topic 15 /Content/Topic... None
17 Topic 16 /Content/Topic... None
18 Topic 17 /Content/Topic... None

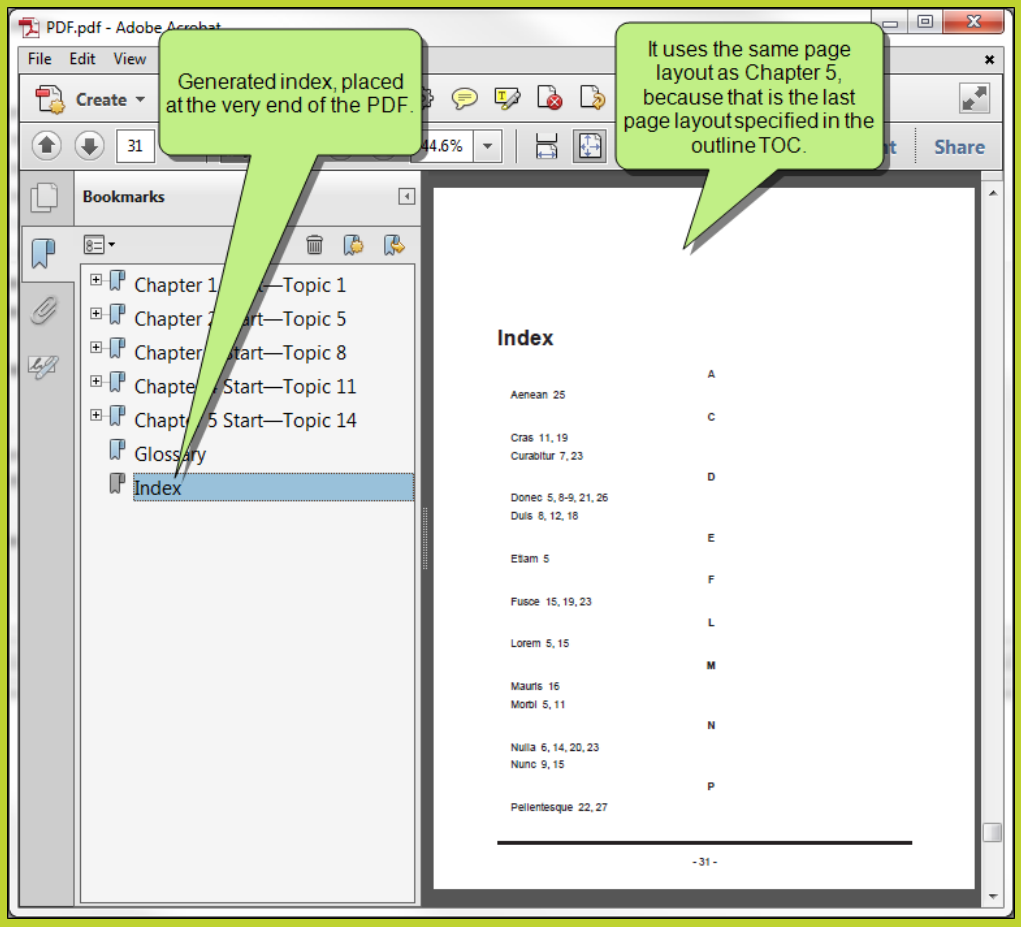
In the Target Editor, you select the **Advanced** tab and select **Generate TOC Proxy**, **Generate Index Proxy**, and **Generate Glossary Proxy**. In addition, you also select an option labeled **Inject empty pages as needed to ensure TOC nodes start on their selected pages** and another labeled **Use TOC depth for heading levels**. These last two options are not required to use the auto-generate feature, but they are popular options for generating print-based output.



After you generate the PDF output, it looks something like this:




PDF.pdf - Adobe Acrobat
File Edit View
Create
Share
Bookmarks
Generated glossary, placed after the chapters but before the index.
It uses the same page layout as Chapter 5, because that is the last page layout specified in the outline TOC.
Chapter 1 —Topic 1
Chapter 2 rt—Topic 5
Chapter tart—Topic 8
Chapter Start—Topic 11
Chapter 5 Start—Topic 14
Glossary
Index
Glossary
F
Fifth term
Definition for fifth term
First term
Definition for first term
Fourth term
Definition for fourth term
S
Second term
Definition for second term
T
Third term
Definition for third term
- 29 -



Note: In order for an index to be generated, you must insert at least one index keyword in a topic or snippet to be included in the output.

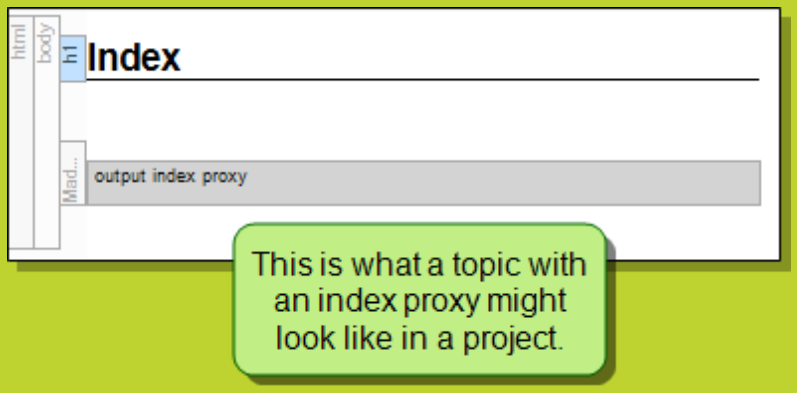
Creating an Index Manually for Print

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

To create an index manually for print output, you need to create a unique topic and insert an index proxy into it. Alternatively, you can let Flare auto-generate one for you (see "Auto-generating Indexes for Print" on page 129).

The following explains how to use the manual method.

EXAMPLE



This is what a topic with an index proxy might look like in the output.

Index

A

Address 13

B

Bugs 7

C

Canines See **Dogs**
Company 13
Concepts 4
Contact 13
    Address 13
    Email 13
    Phone 13

D

Dogs 8
Drop down text 3

E

Email 13

F

Fax 13

H

History 13

I

Insects See **Bugs**

M

Mission 13

P

Phone 13
Preview 3

S

Structure 4

U

Using this sample 2

W

What's New 3

HOW TO CREATE AN INDEX MANUALLY FOR PRINT

1. Add a new topic as you normally would.
2. At the top of the topic, enter a title for your index.

   If you apply any of Flare's <h1> through <h6> tags to it, the index title will be displayed in the print TOC (if you create one).

   Note: If you are creating Adobe FrameMaker output, this content will be placed in an "index header," which is a text frame that occupies the space just before the actual index begins.

3. Most likely, you will want to remove any text after the index title.
4. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Index Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Index Proxy**.

   The Index Proxy dialog opens.

   Note: If you are creating Adobe FrameMaker output, Flare will automatically create a chapter break both before and after any topic that contains an index proxy. This means that your index will be contained in a separate file in the FrameMaker output.

5. Complete the options in the dialog.

» **Generate Headings** Select whether you want the printed index to include headings (e.g., A, B, C).

> **Note:** You can also edit this setting using your stylesheet. The default setting is to always include index headings. But if you want headings to always be excluded from indexes, you can modify the mc-index-heading property for the MadCap|indexProxy style.

» **Column Count** Select the number of columns that you want to be used in Microsoft Word or Adobe FrameMaker output to display the index.

> **Note:** This option is for Word and FrameMaker output only. If you are producing PDF, XPS, or XHTML output, you can set the number of columns for an index in the page layout.

> **Note:** If you are creating Adobe FrameMaker output and add text below the index proxy, that content will be displayed in the same columns as the actual index entries. Therefore, you may want to avoid adding text below the index proxy.

» **(Optional) Header Height** Enter the amount of space to be occupied by the index header (i.e., the index title). This lets you control the spacing between the header and the actual index.

> **Note:** This feature is for Adobe FrameMaker output only.

» **(Optional) Stylesheet Class** You can select a style class to associate with the proxy.

You might create and use style classes if you want to generate multiple indexes with different looks for each output. Otherwise, the index will use the style settings from the parent <MadCap|indexProxy> style. You can create a style class for this purpose in the Stylesheet Editor. To do this, select the **MadCap|indexProxy** style and click **Add Class** to create a class. The class will then be available from this field in the Index Proxy dialog.

> **Note:** If you want to affect the look of the individual entries in the generated index, you can use the IndexHeading and the Index1 through Index9 styles (classes of the <p> tag) in the Stylesheet Editor. For example, if you want to use blue font for the first-level entries in the generated index, you can change the font color setting on the p.Index1 style.

6. Click **OK**. The proxy is added to the topic.
7. Click to save your work.

AUTO-GENERATE VERSUS MANUAL PROXIES

The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.

Note: By default, if your index contains entries with multiple pages in a row, this will be displayed as a range with the pages separated by a dash. For example, instead of showing 10, 11, 12, 13, the index entry will display 10-13.

Note: For Adobe PDF, Microsoft XPS, and XHTML output, you can insert index-related Heading variables into page layouts. These variables let you automatically display index headings or terms at the top of pages. See "Inserting Heading Variables Into Frames" on page 433.

Note: If you are using chapter or volume autonumbers and you want these numbers to be reflected in a print index, you can do so by specifying the autonumbers at the appropriate locations in your outline TOC (instead of inserting Chapter or Volume Number variables in a page layout). See "Page Autonumbers in Print Indexes" on the following page.

Make sure to add the topic with the proxy to the outline TOC. See "Including Print Topics in an Outline TOC" on page 539.

Page Autonumbers in Print Indexes

There are two basic methods for adding page autonumbers (i.e., page numbers that also include the chapter or volume autonumber) to print-based output—(1) by inserting variables into page layout frames or (2) by setting the autonumbers on the outline TOC entries where new "chapters" start. With the first method, the autonumbers are shown on your main content pages, but they are not included in a generated print index. With the second method, the autonumbers are shown both on your main content pages and in a generated index. You would use the first method if you want a quicker process and are not including a print index, but you would use the second method if you need the autonumbers to show up in an index.

- **Insert Variables into Page Layout Frames (Not Supported in Print Index)** With this method, you can insert the appropriate autonumber variables in your page layouts. This is the fastest and easiest solution if you are not also creating a print index. See "Chap/Sec/Vol Variables in Frames" on page 430 and "Inserting Page Numbers into Frames" on page 442.

E X A M P L E

Let's say you have a project with chapter autonumbers in topics that you have designed to be the start of new chapters in your output. In order to include those same chapter numbers in the page numbering, you opened your page layout, selected the footer frame, and pressed F2 to edit it. Inside that footer frame, you inserted a chapter number variable, typed a period, and then inserted a page number placeholder. Like this:

ChapterNumber: 1 . PageNumber: 1

When you view the generated output, you see the page numbers displayed correctly as 1.1, 1.2, 1.3, 2.1, 2.2, and so on. Unfortunately, if you also include a print index in the output, the page numbers are displayed as 1, 2, 3, 4, etc. In other words, the page numbers are shown in the index, but the chapter autonumbers are not.

- **Set Autonumbers on Outline TOC Entries (Supported in Print Index)** If you intend to include a print index in the output, you should not insert the autonumber variable in the page layout. Instead, you should set the chapter or volume autonumbers in the TOC Editor, at the same locations where you create chapter breaks for the output. The following steps show you how to do this.

HOW TO SET AUTONUMBERS ON OUTLINE TOC ENTRIES AND INCLUDE THEM IN A PRINT INDEX

1. Set up your topics to use chapter or volume autonumbers where appropriate (e.g., on the heading for a topic that will come first in a new chapter). See "Autonumbers" on page 252 and "Autonumbers for Styles" on page 257.
2. Create your page layout(s). In the appropriate header or footer frames, insert a page number placeholder. *Do not* insert a chapter or volume number variable. See "Page Layouts" on page 336 and "Inserting Page Numbers into Frames" on page 442.

E X A M P L E

Let's say you have a project with chapter autonumbers in topics that you have designed to be the start of new chapters in your output. You want to include those same chapter numbers in the page numbering at the bottom of pages, and you also want them to display in a print index that you are creating.

First, open your page layout, select the footer frame, and press F2 to edit it. Inside that footer frame, you insert a page number placeholder. When finished, it should look something like this:

PageNumber: 1

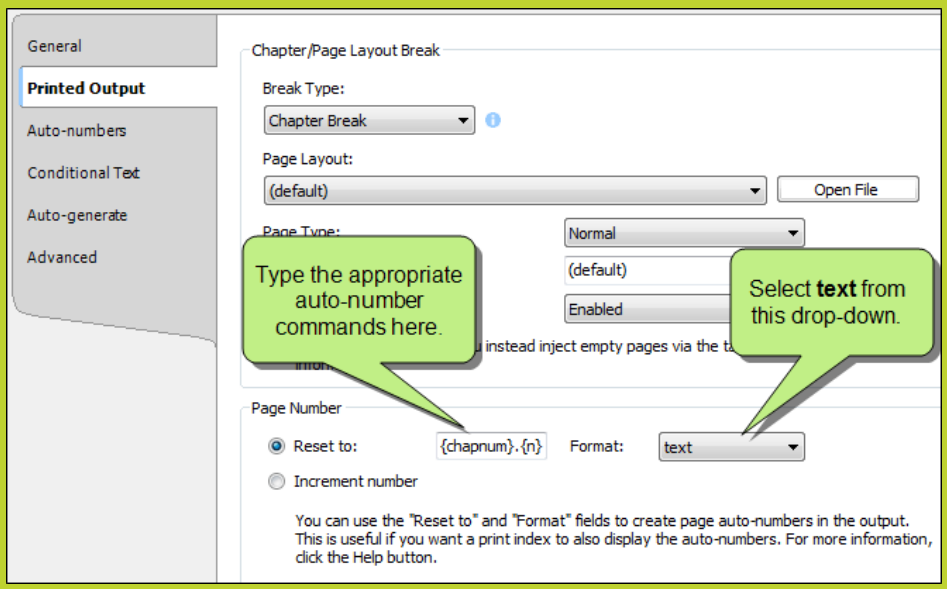
3. Open your outline TOC and double-click an entry where you want to start a new chapter or volume. The Properties dialog opens.
4. Select the **Printed Output** tab.
5. In the Break Type field select **Chapter Break** and complete the other fields in that area as necessary. See "Specifying Chapter and Page Layout Breaks" on page 542.
6. In the **Page Number** area, click in the **Format** field and select **text**.

7. In the **Reset to** field, enter the appropriate commands. For a chapter autonumber, you can use {chapnum}. For a volume autonumber, you can use {volnum}. You can also insert any text, such as a period or dash, as well as a counter command, such as {n}.

E X A M P L E

Let's say that you want to display the chapter autonumber, followed by a period and then the page number. In that case, you would type the following:

```
{chapnum}.{n}
```



The {chapnum} command indicates a chapter autonumber. If you had wanted to show the volume autonumber instead, you would have used the {volnum} command.

Because you want a period to separate the chapter autonumber and the incremented page number, you simply type it. Then you add the page number command, which is {n}.

8. Select the **Autonumbers** tab.

9. For the first chapter or volume in your output, you will most likely want to select the appropriate **Reset to** option and enter **1**. For subsequent chapters or volumes, you will probably want to select **Increment number**. See "Autonumbering Flow for Output" on page 556.
10. Click **OK**.
11. Repeat steps 3-10 for each TOC entry that is designed to start a new chapter or volume. By holding down the CTRL or SHIFT key, you can select multiple entries in the outline TOC and provide the settings for all of them at one time.
12. Click to save your work.
13. Create a topic to hold your print index and add it to your outline TOC . See "Creating an Index Manually for Print" on page 143.
14. Build and view the output. See "Building Output" on page 617 and "Viewing Output" on page 632.

    When you view the generated output, you will see the page numbers displayed correctly (e.g., 1.1, 1.2, 1.3, 2.1, 2.2, and so on). In the generated print index, you will see the same autonumber/page number combination—as long as your topics include index keywords (see "Inserting Index Keywords" on page 105).

Note: Only chapter and volume autonumbers are supported. Section autonumbers are not supported in this feature.

Lists of Concepts

A concept is a marker that you can insert into related topic files in order to "tie" them together. You can then add a concepts proxy in a topic to generate a list of concepts in the output. See "Creating a List of Concepts" on page 163.

In Flare there are a couple of different ways to create concept keywords.

- **Method 1—Add Concepts to Concept Window Pane and Assign Topics** You can use the bottom area of the Concept window pane (**View>Concept Window**) to add concepts (see "In Flare there are a couple of different ways to create concept keywords." above) and assign topics to them (see "Assigning Topics to Concepts" on page 155). The major benefit of this method is that it is an easy and quick way to place the same concept marker at the beginning of multiple topics and maintain better consistency.
- **Method 2—Insert Concepts in Individual Topics** You can open a topic and use the top area of the Concept window pane to insert concepts into that file (see "Inserting Concepts" on page 158).

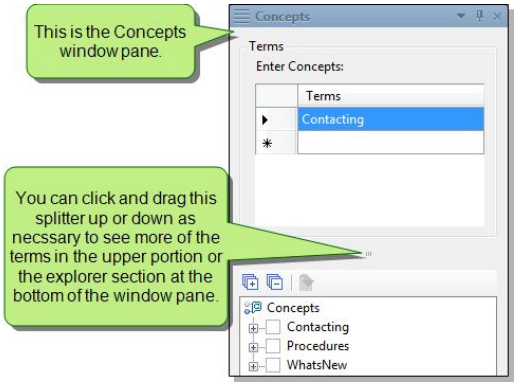
Adding Concepts

Use the following steps to add concepts.

HOW TO ADD A CONCEPT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Concept Window**.
   - **Menu** Select **View>Concept Window**.
   - **Keyboard Shortcut** Press **SHIFT+F9**.

   The Concept window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



2. In the explorer area at the bottom of the window pane, right-click on **Concepts** and from the context menu select **Add Concept**.
3. Type the concept keyword and press **Enter**.

Assigning Topics to Concepts

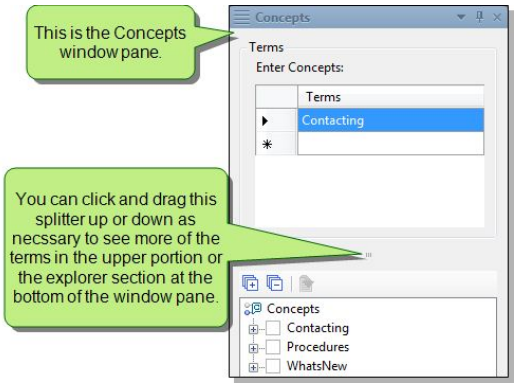
After you add concepts in the Concept window pane, you can assign topics to them. There are two methods for doing this.

- Context menu in Concept window pane
- Drag from Content Explorer

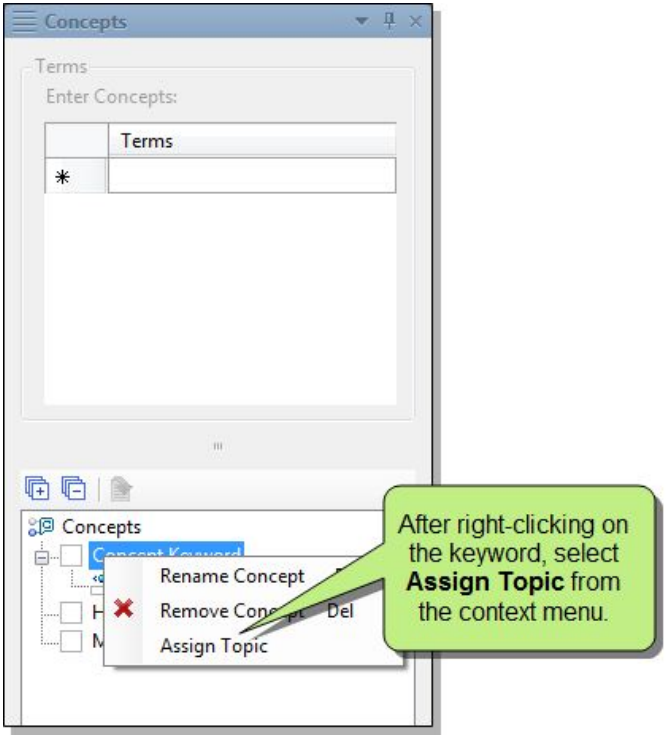
HOW TO ASSIGN TOPICS TO A CONCEPT—CONTEXT MENU IN CONCEPT WINDOW PANE

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Concept Window**.
   - **Menu** Select **View>Concept Window**.
   - **Keyboard Shortcut** Press **SHIFT+F9**.

   The Concept window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



2. Right-click on the concept and from the context menu select **Assign Topic**.



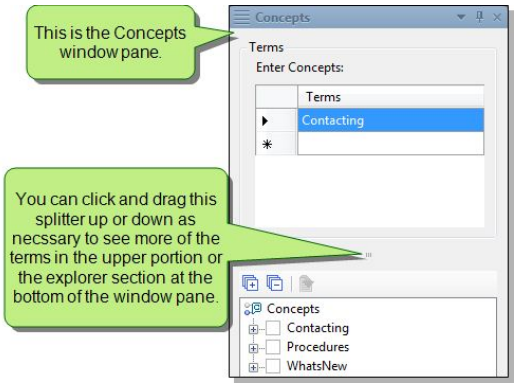
3. In the dialog that opens, find and select the topic(s). You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
4. In the dialog, click **Close**.

   Paths to the selected topics are displayed in the Concept window pane after the keyword. And a concept marker is added at the beginning of each topic.

HOW TO ASSIGN TOPICS TO A CONCEPT—DRAG FROM CONTENT EXPLORER

1. Make sure the Content Explorer is open.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Concept Window**.
   - **Menu** Select **View>Concept Window**.
   - **Keyboard Shortcut** Press **SHIFT+F9**.

   The Concept window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



3. In the local toolbar of the Content Explorer, click the **Show Files** button. The window pane splits into left and right halves.
4. In the left half of the Content Explorer, click the folder holding the topics that you want to assign to a concept.
5. In the right half of the Content Explorer, select the topics. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
6. Drag the selected topics and drop them on the concept keyword that is displayed the bottom (explorer) portion of the Concept window pane.

   Paths to the selected topics are displayed in the Concept window pane after the keyword. And a concept marker is added at the beginning of each topic.

Inserting Concepts

There are a few different ways to insert an index keyword into a topic or snippet, and each has its own advantages.

Drag-and-Drop Method

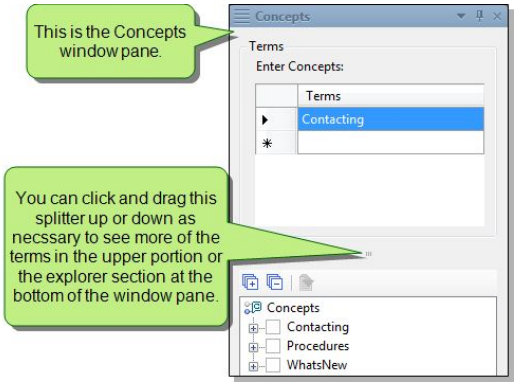
Use this method to quickly insert a concept that already exists in your project.

- **Advantage** It is extremely fast.
- **Disadvantage** The concept that you want to insert must already exist in the project. This means you must first insert the concept into a topic using one of the other methods.

HOW TO INSERT AN CONCEPT USING THE DRAG-AND-DROP METHOD

1. Open the content file (e.g., topic, snippet).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Concept Window**.
   - **Menu** Select **View>Concept Window**.
   - **Keyboard Shortcut** Press **SHIFT+F9**.

   The Concept window pane opens. The window pane is split into two sections—the Terms area at the top and the Explorer area at the bottom. If you want to see more or less of either section, you can click the splitter between them and drag it up or down.



3. In the bottom (explorer) area of the Concept window pane, click the concept and drag it to the location in the topic where you want to insert it. As you drag the concept into the topic, a vertical red bar acts as a guide to help you place the concept in the topic.

   The concept is displayed within a marker in front of the word where you added it (as long as markers are turned on). A marker can hold multiple concepts, but most times you only need one concept per marker.

4. Click to save your work.

Concept Window Pane Method

Use this method to insert a concept in the Concept window pane.

- **Advantage** It lets you continue to perform other tasks in the topic without having to "switch modes."
- **Disadvantage** It is not quite as fast as the other methods.

HOW TO INSERT AN CONCEPT USING THE CONCEPT WINDOW PANE METHOD

1. Open the content file (e.g., topic, snippet).
2. Click at the location where you want to insert a concept.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Reference** section select **Concept Window**.
   - **Menu** Select **View>Concept Window**.
   - **Keyboard Shortcut** Press **SHIFT+F9**.

   The Concept window pane opens.
4. Click in an empty field in the **Terms** column.
5. Type the concept as you want it to appear.
6. Press **Enter**. The concept is displayed within a marker in front of the word where you added it (as long as markers are turned on). A marker can hold multiple concepts, but most times you only need one keyword per topic.
7. Click to save your work.

Concept Entry Mode Method

Use this method to accomplish the same thing as the Concept window pane method. The difference is that, with this method, you do not need to move your cursor from the topic to the Concept window pane. You simply click at the spot in the text where you want to insert the keyword and start typing. The words you type are added directly into the Concept window pane. This is a good method to use if you plan to create concepts in a lot of topics all at once, without performing any other tasks in the topic.

- **Advantage** It is extremely fast.
- **Disadvantage** If you are adding a concept as you work on a topic, you need to remember to switch off the Concept Entry Mode so that you can return to editing your topic.

HOW TO INSERT AN CONCEPT USING THE CONCEPT ENTRY MODE METHOD

1. Open the content file (e.g., topic, snippet).
2. Do one of the following, depending on the part of the user interface you are using:
   - **Menu** Select **Tools>Concepts>Concept Entry Mode**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.
   - **Local Toolbar** In the local toolbar of the XML Editor click .

   The cursor changes, displaying a small boxed "c" next to it.
3. Click at the place in your topic where you want to add a concept.
4. Type the phrase that you want to add as the concept.

   As you start typing, the Concept window pane opens (if it was not previously opened), and the phrase is added to the first empty field under the Terms column.

> **Note:** As you type in the Concept window pane, notice that the cursor does not lose focus in the XML Editor. It merely turns gray so that you know for certain where you are adding the concept. When you return to the XML Editor, the cursor returns to its previous state.

5. Press **Enter**. The concept is displayed within a marker in front of the word where you added it (as long as markers are turned on). A marker can hold multiple concepts, but most times you only need one keyword per topic.
6. If you want to add more concepts in the topic, repeat steps 3-5.
7. Click to save your work.

Note: To turn off the Concept Entry Mode and return to regular editing, you can click again.

Note: If you want to see all of the concepts that you have inserted in your project, they are displayed in the bottom portion of the Concept window pane.

Creating a List of Concepts

You can use the concepts proxy to generate a list of all of the concepts in your project, with links to the corresponding content. When you generate the output, the proxy is replaced with a list of the paragraph text found wherever a concept has been inserted.

HOW TO CREATE A LIST OF CONCEPTS

1. Add a new topic as you normally would.
2. At the top of the topic, enter a title for your list (e.g., "List of Concepts").
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Concepts Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Concepts Proxy**.

   The Concepts Proxy dialog opens.
4. (Optional) In the **Stylesheet class for proxy** field, you can select a class to affect the look of the entire list.

   You might create and use a proxy style class, for example, if you want to add a border around the generated list. If you do not select a class from this field, the generated list will use the style settings from the parent <MadCap|-conceptsProxy> style. You have the option of creating a class for this proxy style in the Stylesheet Editor. To do this, select the **MadCap|conceptsProxy** style and click **Add Class** to create a class. The class will then be available from this field. For more information see the online Help or the Flare *Styles Guide*.
5. Click **OK**. The proxy is added to the topic.
6. Click to save your work.

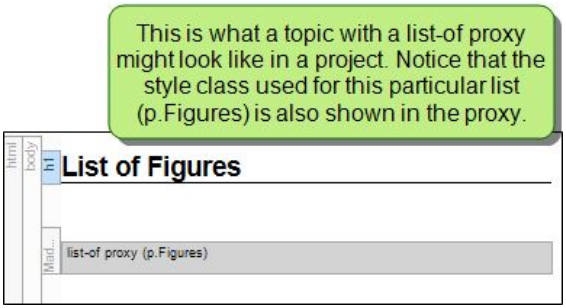
Lists of Elements

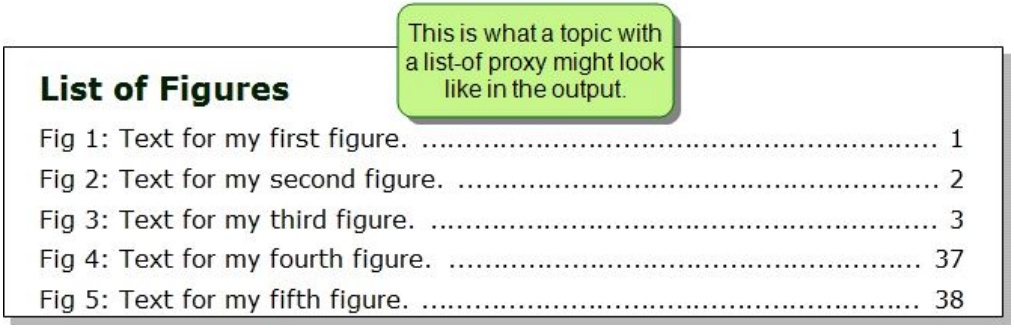
This feature is supported in all outputs.

You can use the list-of proxy to generate a list of various types of elements (e.g., tables, images) in your output, with links to the corresponding content.

This feature can be used to create a list of just about any type of element that you can think of. It does so based on the list-of proxy and whatever styles that you tell it to use. When you generate the output, the list-of proxy is replaced with a list of all paragraphs using the style that you specified.

Two of the more common uses for this proxy are to create a list of images or a list of tables.





Creating a List of Elements

You can use the list-of proxy to generate a list of various types of elements (e.g., tables, images) in your output, with links to the corresponding content.

HOW TO CREATE A LIST OF ELEMENTS

1. Add a new topic.
2. At the top of the topic, enter a title for your list (e.g., "List of Figures").
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>List-Of Proxy**.
   - **Menu** Select **Insert>Proxy>Insert List-Of Proxy**.

   The List-Of Proxy dialog opens.
4. In the **Tag Name** field, select the parent style tag to be used for creating the list.

   E X A M P L E

   Let's say that you've inserted tips throughout your project, and before each tip you've added a short heading with autonumbering that briefly describes the tip (e.g., "Tip 2.3: Use Styles for Formatting"). Now you want to create a list of all tip headings. Let's say that you created a style class based on the <p> tag called "tiphead" for this purpose (i.e., "p.tiphead"). In this case, you would select "p" from the Tag Name field when inserting the list-of proxy.

5. (Optional) In the **Tag Class** field, select the style class to be used for creating the list.

   E X A M P L E

   Using the example above, you would select "tiphead" from this field.

6. (Optional) In the **Stylesheet class for each generated entry** field, you can select yet another style class that is used to determine how each item in the generated list looks. This should be a custom class of the <p> tag that you have created. You would use this style class, for example, if you want to change the font of the entries or add a leader (e.g., series of dots) between the entries and the page numbers. For more information about using styles, including steps, see the online Help or the Flare *Styles Guide*.

7. (Optional) In the field labeled **Stylesheet class for proxy**, you can select a class to affect the look of the entire list.

   You might create and use a proxy style class, for example, if you want to add a border around the generated list. If you do not select a class from this field, the generated list will use the style settings from the parent <MadCap|listOfProxy> style. You have the option of creating a class for this proxy style in the Stylesheet Editor. To do this, select the **MadCap|listOfProxy** style and click **Add Class** to create a class. The class will then be available from this field.

8. Click **OK**. The proxy is added to the topic.

9. Click to save your work.

Mini-TOCs

This feature is supported in all online (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, and WebHelp Plus) and print (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML) outputs.

A mini-TOC proxy allows you to generate a portion of your table of contents (TOC) or topic headings at a particular location in the output. A mini-TOC proxy can be used for both online and print-based output. For online output, you can insert a mini-TOC proxy into a master page or a topic. For print-based output formats, you can insert a mini-TOC proxy into any topic where you want to generate a small TOC. For example, let's say you want the first page of each chapter in a manual to start out with a small TOC, showing the page numbers where subheadings occur within that chapter. In that case, you can insert a mini-TOC proxy into each topic that you plan to use as the beginning of each chapter. If you insert the proxy into a master page, each topic using that master page will have a mini-TOC. If you insert the proxy into certain topics only, mini-TOCs will be generated only within those particular topics.

How It Works

How does Flare decide which topic links to include in a mini-TOC? It works a bit differently for online output than it does for print-based output.

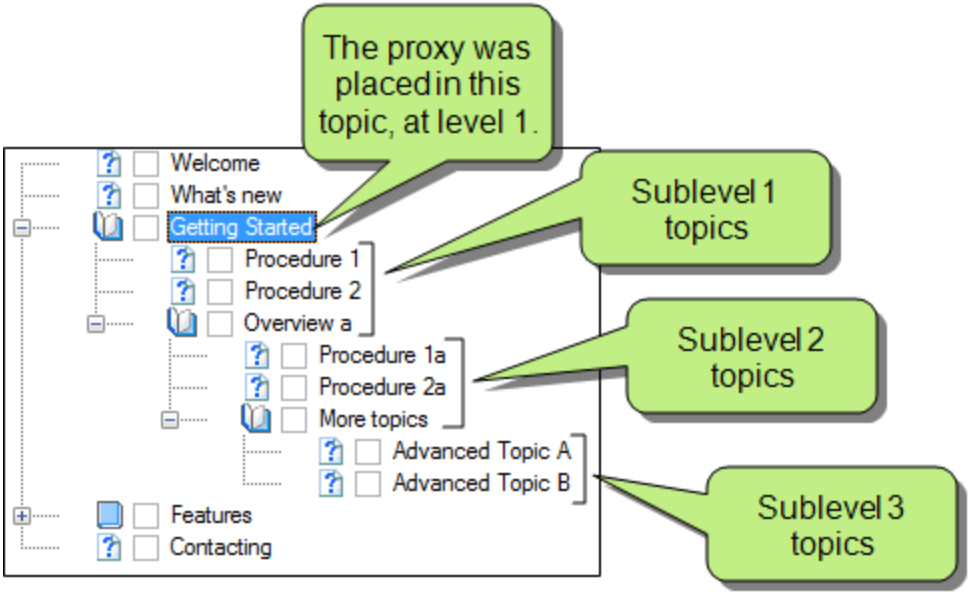
PRINT-BASED OUTPUT

By default the mini-TOC for print output is based on the <h1> through <h6> tags that you have applied to content in your topics. When you insert the proxy, you select a number for the heading depth. This number refers to the *absolute heading level*. For example, if you place the proxy after an <h1> heading and select 4 as the depth, the proxy will include headings that are using <h2>, <h3>, and <h4> styles (but not <h5> or <h6>). If you place the proxy after an <h2> heading with 4 as the depth, the proxy will include the <h3> and <h4> styles only. Please note that the print mini-TOC created from the proxy is *not* necessarily based on the structure of your outline TOC (i.e., the file found in the TOCs folder in the Project Organizer). However, there is a switch on the Advanced tab in the Target Editor that lets you base the generated mini-TOC on the structure of your outline TOC.

ONLINE OUTPUT

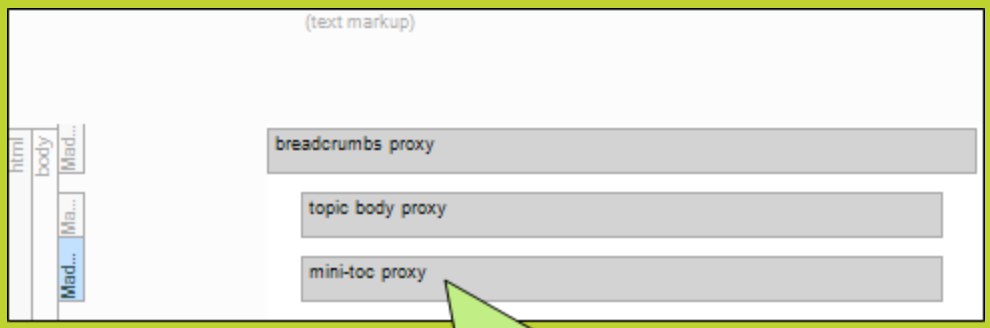
For online output, the depth refers to the *number of sub-levels* found under that topic in the TOC file.

Let's say you place the proxy in a topic that is located on the first level in a TOC, with three levels of topics below it, like this:



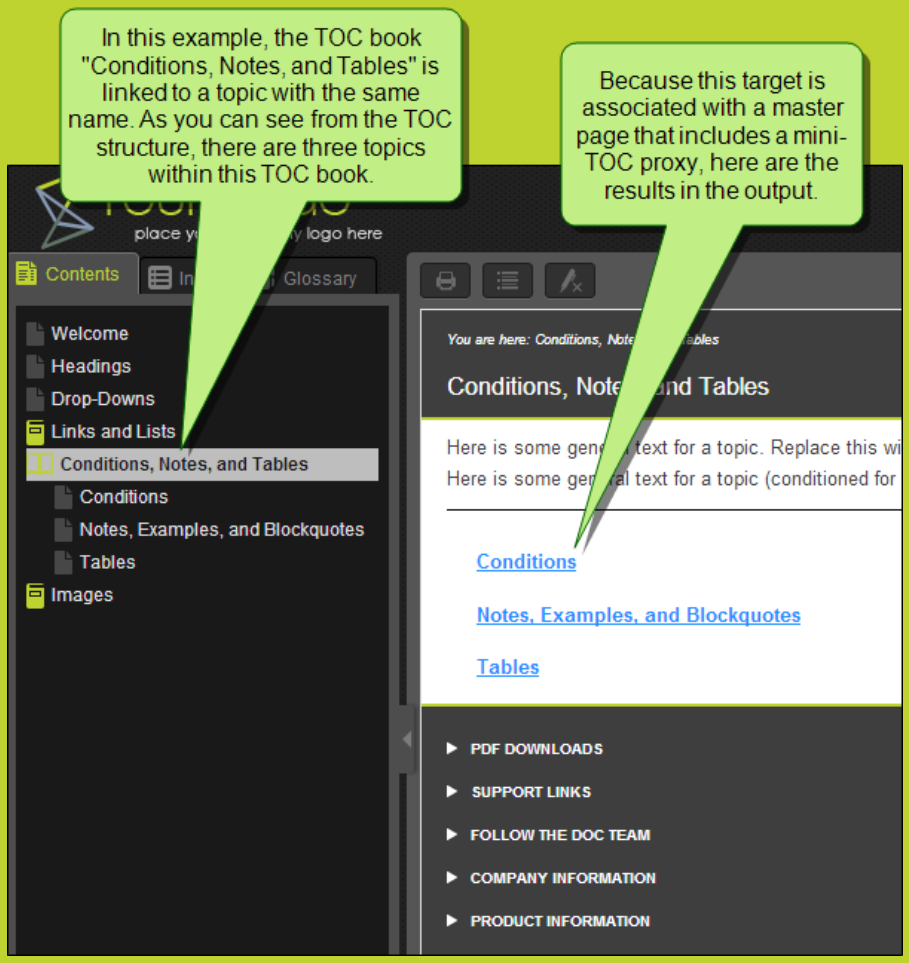
With a depth of 3, all three levels of topics will be included in the mini-TOC in online output, even if those topics happen to start with an <h1> heading.

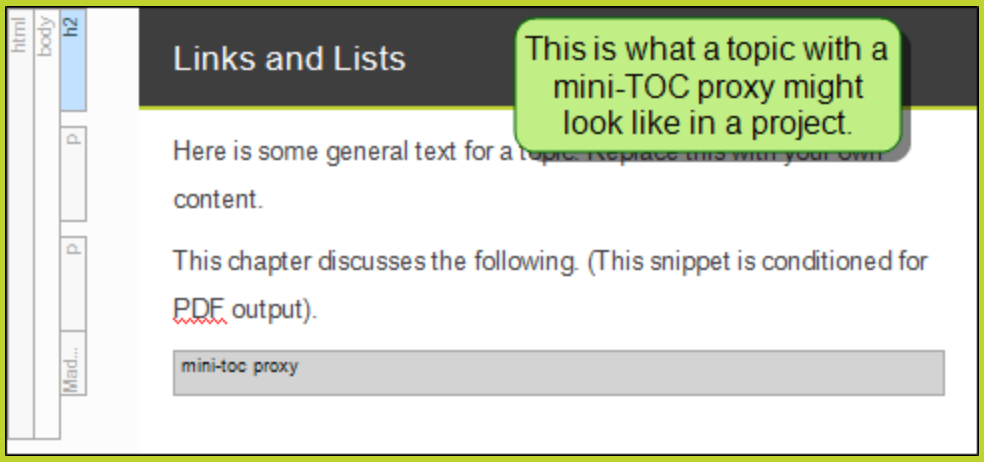
EXAMPLES FOR ONLINE OUTPUT

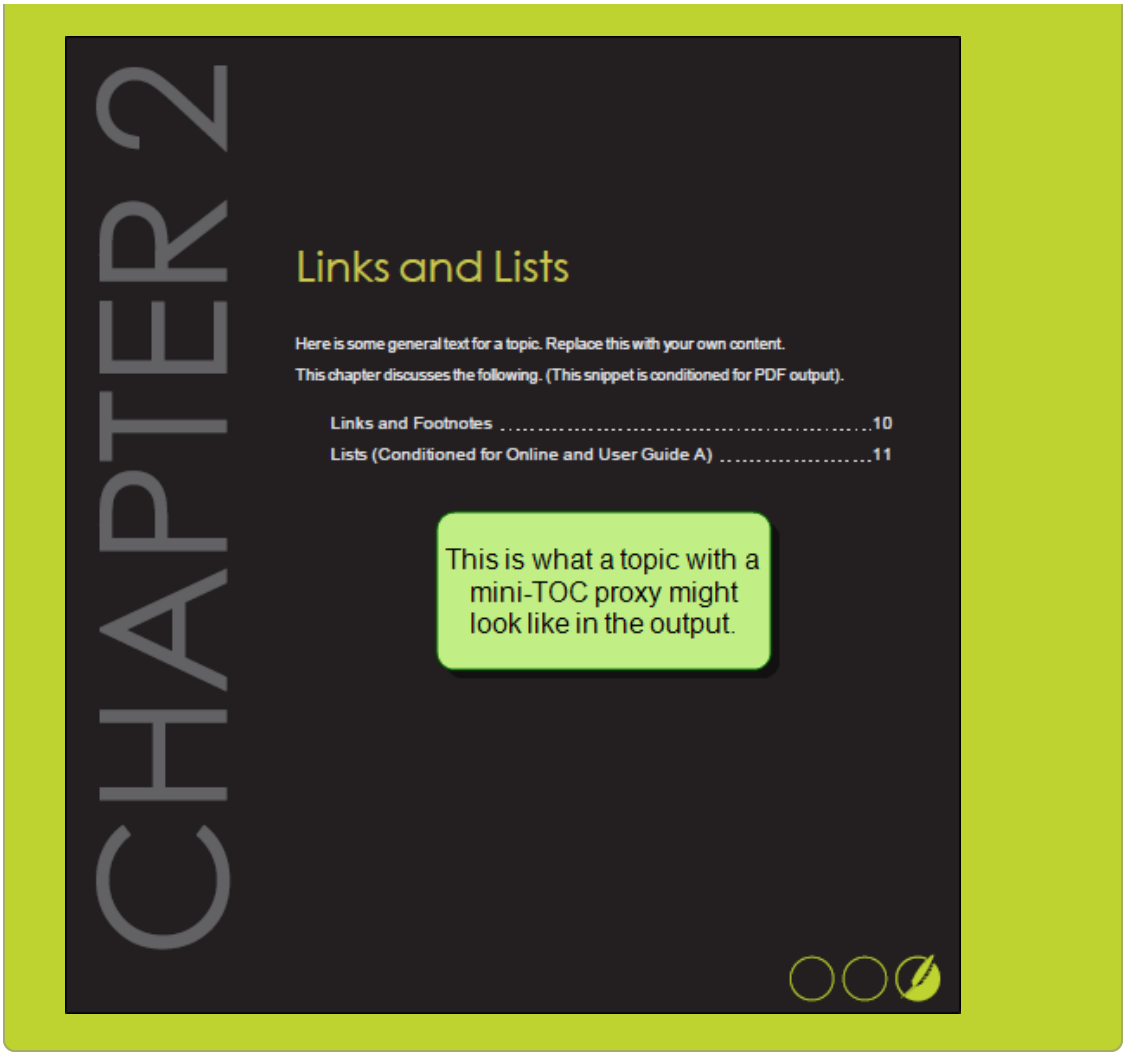


Here is an example of a master page where a mini-TOC proxy has been inserted. A body proxy and breadcrumbs proxy have also been inserted.

Here is how a mini-TOC might look in the output for a Help system:




html
body
h2
p
p
Mad...
Links and Lists
This is what a topic with a mini-TOC proxy might look like in a project.
Here is some general text for a
content.
This chapter discusses the following. (This snippet is conditioned for PDF output).
mini-toc proxy


CHAPTER 2
Links and Lists
Here is some general text for a topic. Replace this with your own content.
This chapter discusses the following. (This snippet is conditioned for PDF output).
Links and Footnotes 10
Lists (Conditioned for Online and User Guide A) 11
This is what a topic with a mini-TOC proxy might look like in the output.

EXAMPLE—STYLES METHOD FOR PRINT OUTPUT

Let's say that you want to use the default method in print-based output, where the mini-TOC entries are based on headings using the <h1> through <h6> styles in your project. Perhaps you have created a lengthy topic, with the <h1> style applied to the first heading in that topic and several subheadings below it that are using the <h2> and <h3> styles. Like this:

Main Topic Heading (h1 style)

Topic text is added here.

First Subheading (h2 style)

More text.

Second Subheading (h2 style)

More text

Third Subheading (h3 style)

More text.

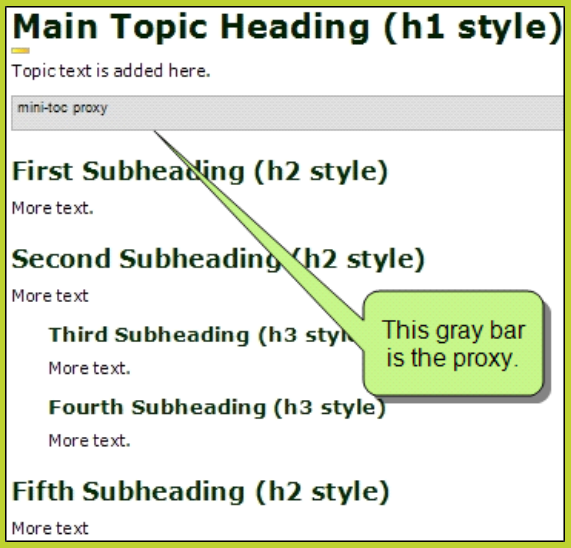
Fourth Subheading (h3 style)

More text.

Fifth Subheading (h2 style)

More text

Now let's say that you insert a mini-TOC proxy between the <h1> heading and the first <h2> heading, like this:



When you insert the proxy, let's say you specify that it should use a depth of 3. In that case, the output will display links that point to all your subheadings—the <h2> headings (which are second-level headings), as well as the <h3> headings (which are third-level headings). But suppose you also have, say, <h4> headings in the topic content. Those <h4> headings will not be included in the mini-TOC because you selected a depth of 3 rather than 4 or higher.

In the output, it might look something like this:

Main Topic Heading (h1 style)

Topic text is added here.

First Subheading (h2 style) **3**

Second Subheading (h2 style) **4**

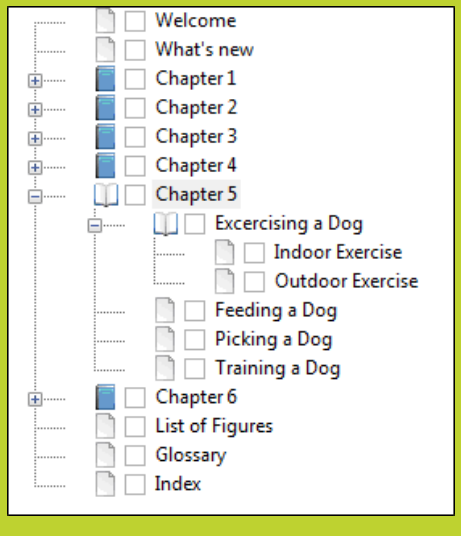
Third Subheading (h3 style) 6

Fourth Subheading (h3 style).....7

Fifth Subheading (h2 style) **10**

EXAMPLE—TOC STRUCTURE METHOD FOR PRINT OUTPUT

Let's say that you want to use the method where the mini-TOC entries are based on the structure of your outline TOC. Perhaps you have created several topics that are organized in your TOC, like "Chapter 5" in this example:

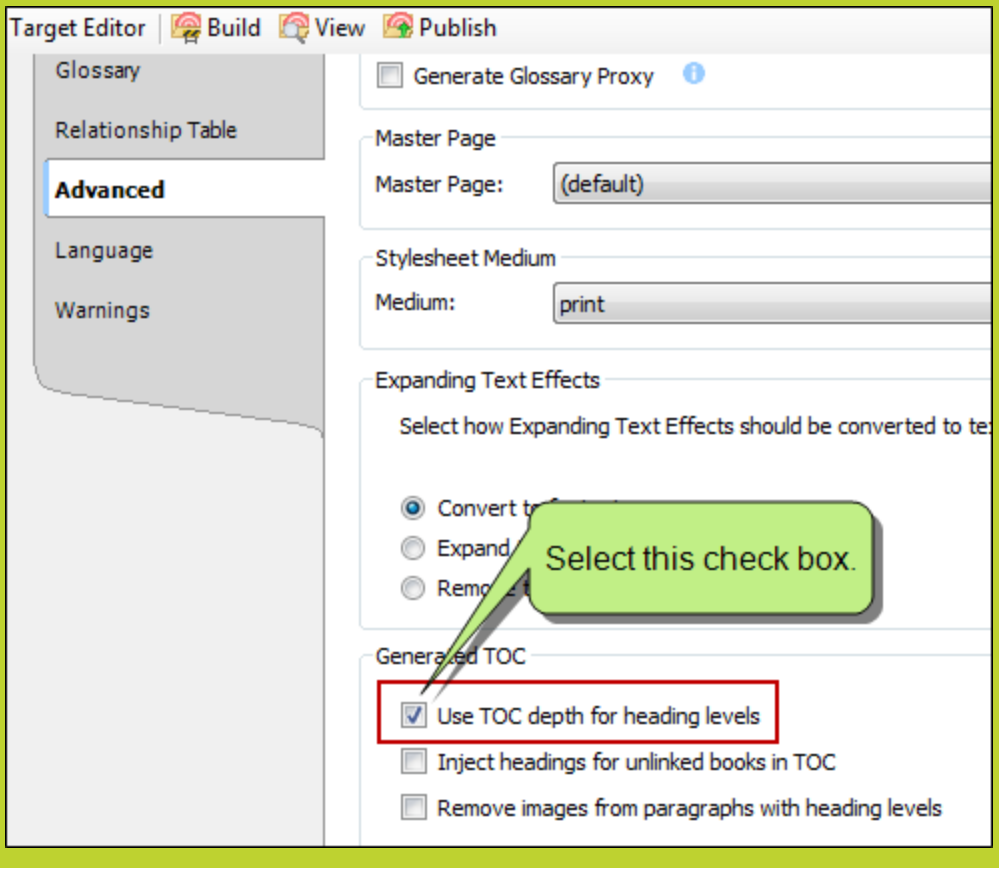


That book in the outline TOC consists of seven topics (Chapter 5, Exercising a Dog, Indoor Exercise, Outdoor Exercise, Feeding a Dog, Picking a Dog, and Training a Dog). Let's say that you want to insert a mini-TOC proxy into the "Chapter 5" topic so that it creates a small TOC pointing to the other topics under it. Furthermore, suppose that you are using the <h1> style at the top of each of those topics, and you do not want to change that fact. In that case, you can simply insert the mini-TOC proxy into the "Chapter 5" topic, like this:

When you insert the proxy, you specify that it should include three levels of headings in the mini-TOC, because in the output Flare will create three levels based on your structure.

You can then open the target that you want to generate, select the Advanced tab, and click the option to generate your TOC based on the structure of the outline TOC in your project.

Like this:



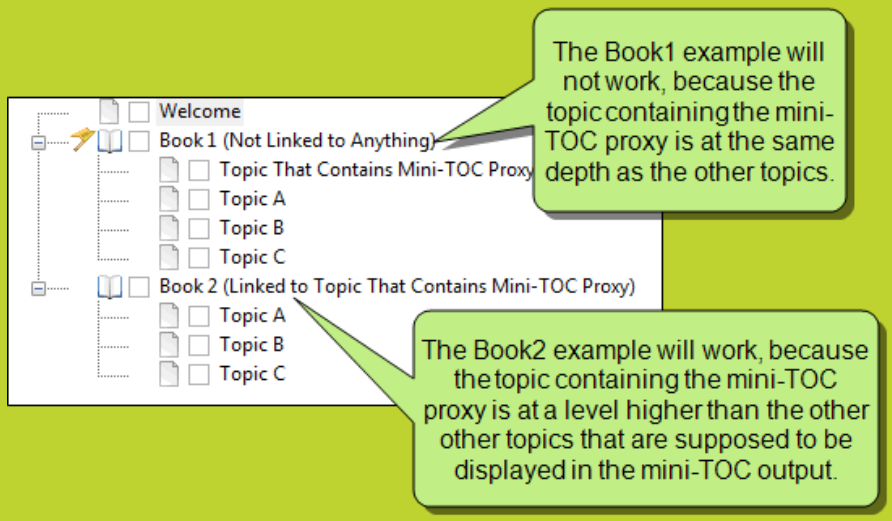
In the output, the "Chapter 5" topic might look something like this:

Chapter 5

This chapter consists of the following sections:

Exercising a Dog 54
Indoor Exercise 56
Outdoor Exercise 59
Feeding a Dog 61
Picking a Dog 65
Training a Dog 67

Please remember that the topic containing your mini-TOC proxy must be on a higher level in the TOC than the topics that you want to be captured by that mini-TOC.



HOW TO CREATE A MINI-TOC

1. Open a topic.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Mini-Toc Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Mini-Toc Proxy**.

   The Mini-TOC Proxy dialog opens.
3. (Optional) From the **TOC Depth** field, select a number to dictate the depth of the mini-TOC. For example, if the proxy is intended for print output and you want the mini-TOC to be based on heading levels in the topics, you might place the proxy after an <h1> heading and select 4 as the depth. In that case, the proxy will include headings that are using <h2>, <h3>, and <h4> styles (but not <h5> or <h6>).
4. (Optional) From the **Stylesheet class** field, you can select a style for the mini-TOC.

   You might create and use style classes if you want to generate multiple mini-TOCs with different looks for each output. Otherwise, the generated mini-TOC will use the style settings from the parent <MadCap|miniTocProxy> style. You can create a style class for this purpose in the Stylesheet Editor. To do this, select the **MadCap|miniTocProxy** style and click **Add Class** to create a class.

   Note: If you want to affect the look of the individual entries in the generated mini-TOC, you can use the MiniTOC1 through MiniTOC9 styles (classes of the <p> tag) in the Stylesheet Editor. For example, let's say that you want to use blue font for the first-level headings in the generated mini-TOC. You can change the font color setting on the p.MiniTOC1 style. You can also modify the entire container holding the mini-TOC. For more information about using styles, including steps, see the online Help or the Flare *Styles Guide*.
5. Click **OK**. The proxy is added to the topic.
6. Click to save your work.

QR Codes

This feature is supported in all outputs.

You can insert a quick response (QR) code into a content file (e.g., topic, snippet) using the XML Editor. A QR code is a type of barcode that can be read by devices such as smart phones. The data encoded in the QR code can be text, a website URL, an email address, contact information, or SMS (Short Message Service, which is used for sending text messages). Basically, QR codes are a way to bridge the gap between a static print document and searchable, more detailed online information at your fingertips.

There are many different kinds of QR code readers on the market. If you have a mobile device that supports QR code readers, you can install an app and use it to read these types of codes.

E X A M P L E

Here is an example of a QR code:

If you have a QR code reader on your cell phone, you can scan this QR code and the MadCap Software website will open on your screen.

Uses for QR Codes

Following are some possible uses for QR codes.

- You create a PDF manual that includes links directing users to your company's website. But you want users to be able to quickly open those links without having to type in the entire URL. So instead of regular hyperlinks, in your PDF you use QR codes.
- You create a quick start guide and are limited to a couple pages. At the bottom of each page, step, or procedure, there is a QR code that people can use to access more detailed information on that topic.
- You publish your entire Help system on a website. You have users who need access to that information when they are "out in the field." So they scan a QR code that opens the URL where your Help system is published.
- You have a procedures manual with QR codes that, when scanned, open movies showing the procedures in action.
- You have a QR code at the bottom of a document takes users straight to a website where they can purchase a particular part or product.

Inserting QR Codes

You can insert a QR code in much the same way you insert an image into a content file (e.g., topic, snippet) .

HOW TO INSERT A QR CODE

1. Open the content file (e.g., topic, snippet).
2. In the XML Editor place your cursor where you want to insert the QR code.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Multimedia** section select **QR Code**.
   - **Menu** Select **Insert>QR Code**.
   - **Keyboard Shortcut** Press **CTRL+Q**.

   The Insert QR Code dialog opens.
4. Select the **General** tab.
5. From the **Content type** field, select one of the following options.

   TEXT

   Select this if you want a simple text message to display on the end user's screen. After selecting this option, complete the following.

   - **Content** Type the short text message that you want users to see after they scan the QR code.

   URL

   Select this if you want a web page to open in the end user's browser. After selecting this option, complete the following.

   - **Content** Type the website path (e.g., http://mycompany.com).

   EMAIL ADDRESS

   Select this if you want a particular email address to display on the end user's screen. The end user might then copy the address to the clipboard and paste it into an email. After selecting this option, complete the following.

   - **Content** Type the email address after the text "mailto:" (e.g., mailto:technicalsupport@mycompany.com).

CONTACT INFORMATION

Select this if you want contact information for an individual to display on the end user's screen. The end user might then create a new contact based on that information. After selecting this option, complete the following.

- **Name** Type the full name of the individual.
- **Company** Type the company name.
- **Phone number** Type the phone number.
- **Email** Type the email address for the individual.
- **Address** Type the physical address.
- **Website** Type the website (e.g., http://mycompany.com).
- **Memo** Type any other relevant information.

SMS

Select this if you want to create an SMS (Short Message Service) message. After scanning the QR code, the end user will be able to quickly send a text message to the specified phone number. After selecting this option, complete the following.

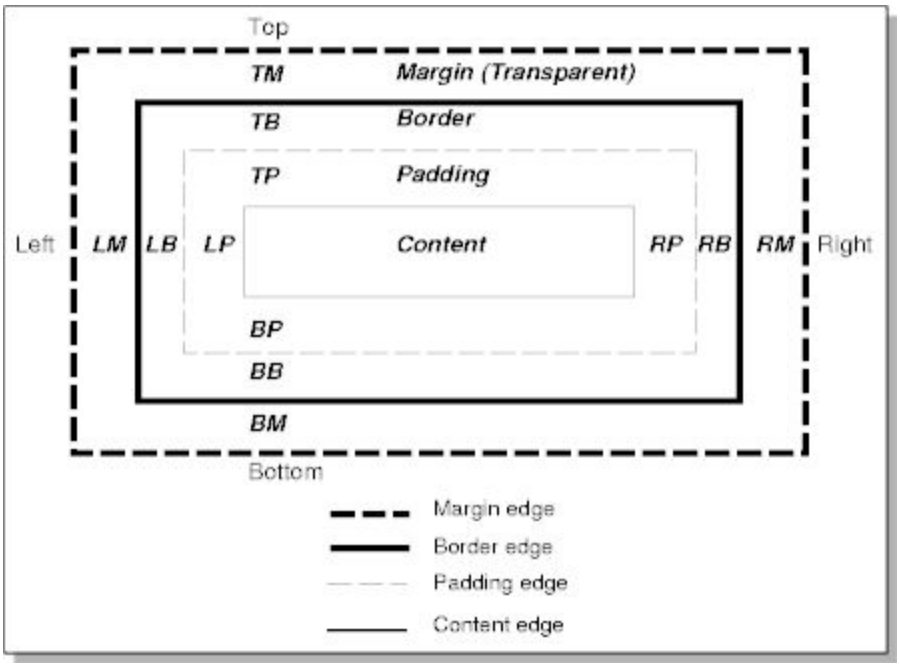
- **Phone number** Type the phone number where the text message is to be sent.
- **Message** Type the text message.

6. (Optional) Click in the **Size** field. Select one of the basic sizes for the QR code. If you select (default), the code will be the size specified in the <MadCap|qrCode> style in your stylesheet. If you want to use a different size, you can set the max-height or max-width value for the <MadCap|qrCode> style tag.
7. (Optional) If you want to apply a specific style class to the QR code, you can select it from the **Style Class** field.

> **E X A M P L E**
>
> Let's say that you have created in your stylesheet a class of the <MadCap|qrCode> tag called "RedBorder" (i.e., MadCap|qrCode.RedBorder) and you have set a red border on that style class. So if you want a QR code to have a red border, you can use that style class when inserting the QR code. If you do not want the QR code to have a red border, you can simply use the default parent <MadCap|qrCode> tag instead.

8. (Optional) In the **Screen Tip** field you can type a phrase that will appear when the end user hovers over the QR code.

9. (Optional) In the **Alternate Text** field you can type alternate text to display when the QR code is not available, such as when a disabled individual is using a screen reader. For more information see the online Help.
10. (Optional) Use any of the other tabs to provide additional settings for the QR code.
    - **Position tab** You can use this tab to adjust the positioning of the QR code on the page. This includes the ability to wrap text around a QR code or float a QR code outside the frame holding the regular flow of text.
    - **Borders & Margins tab** You can use this tab to set borders, margins, or padding for the QR code.



    - **Background tab** You can use this tab to add background settings for the QR code. This includes the ability to specify a color, image, and a repeating pattern for the background image. Normally you would not see a QR code's background, but if you give the QR code a certain amount of padding, you would see the background around the edges of it.
11. Click **OK**. The QR code is inserted.
12. Click to save your work.

Tables of Contents

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

If you want to include a generated table of contents (TOC) in your output, you can do so by following these steps.

1. Do one of the following, depending on whether you want to create the TOC automatically or manually:
   - **Automatic Method** In the target, select the **Advanced** tab and select **Generate TOC Proxy**. See "Auto-generating TOCs for Print" on the next page.
   - **Manual Method** Create a topic with a TOC proxy that will be used as a placeholder for the generated TOC. See "Creating a TOC Manually for Print" on page 200.

   The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.
2. Use one of the following methods to determine which headings show up in the generated TOC, and at which level. See "Determining Heading Levels for a Print TOC" on page 203.
   - **Outline TOC depth** You can use the structure in your "outline TOC" to determine which headings are included in the TOC. For more information about your outline TOC, see "Creating an Outline TOC" on page 533.
   - **Heading Styles** You can use heading styles and the "mc-heading-level" property to determine which headings are included in the TOC.
3. Use styles to determine the look of the generated TOC. For more information see the online Help or the Flare *Styles Guide*.

Auto-generating TOCs for Print

To create a generated table of contents (TOC) in print output, you can let Flare auto-generate one for you, or you can create a unique topic and insert a TOC proxy into it (see "Creating a TOC Manually for Print" on page 200).

The following explains how to auto-generate a TOC.

HOW TO AUTO-GENERATE A TOC

1. Open a target.
2. On the **Advanced** tab of the Target Editor, select **Generate TOC Proxy**.

   Note: This option is disabled by default for existing targets, but enabled for new targets. If a TOC proxy is already present in a topic or snippet that is being included in the output, this auto-generate option has no effect.

3. Click to save your work.

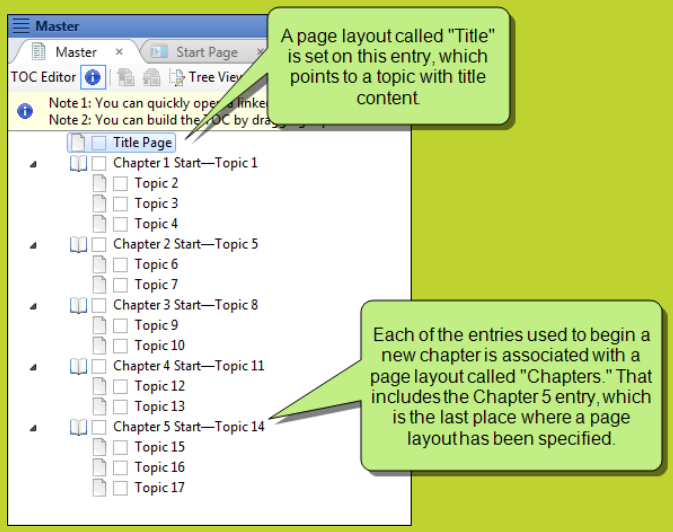
When you generate the target, a TOC will be created and inserted at the beginning of the output. If your page layout includes a Title page type, the TOC is added after the title page in the output.

WHICH PAGE LAYOUT IS USED?

If a TOC, index, or glossary is auto-generated, how does Flare know which page layout to use for them in the output? It uses the same page layout that is being used for the topic(s) just before it.

E X A M P L E

Let's say you have an outline TOC set up like this:

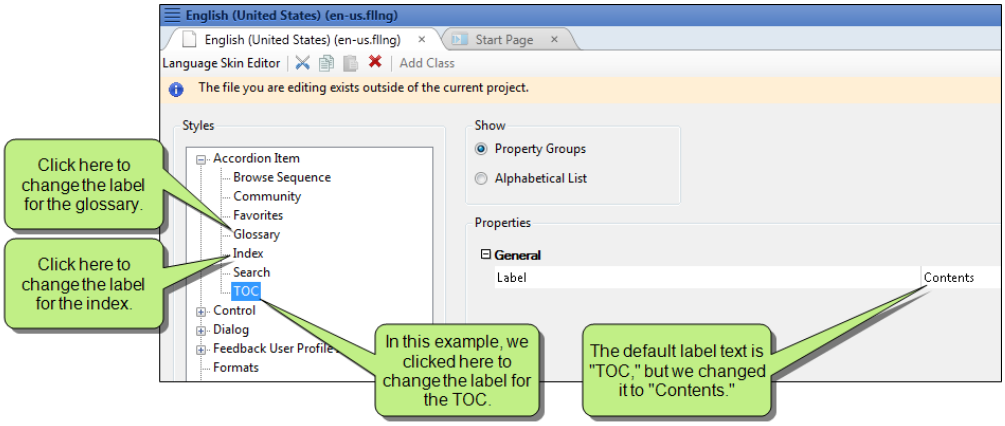


In this case, the generated TOC is going to be placed directly after the title page. It will use the "Title" page layout which is set on the first "Title Page" entry. That page layout has a Title page type in it. That's how Flare knows it should place the TOC directly after it and to use the same page layout to display the TOC.

The generated glossary is going to be placed after the final entry, called "Topic 17," and the generated index will be placed after the glossary. Both of these will use the "Chapters" page layout, because it's the last one that was set.

EDITING ATTRIBUTES FOR GENERATED TOCS, INDEXES, AND GLOSSARIES

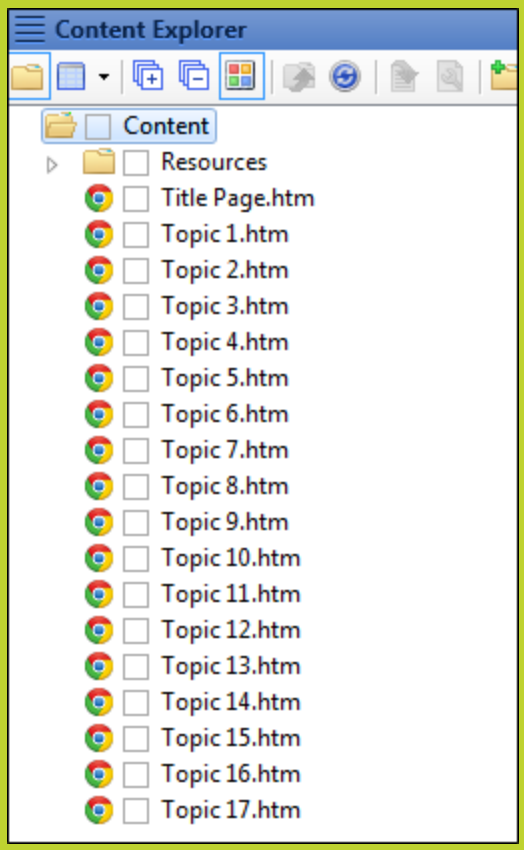
You can change the heading text for each of these auto-generated proxies in the language skin.



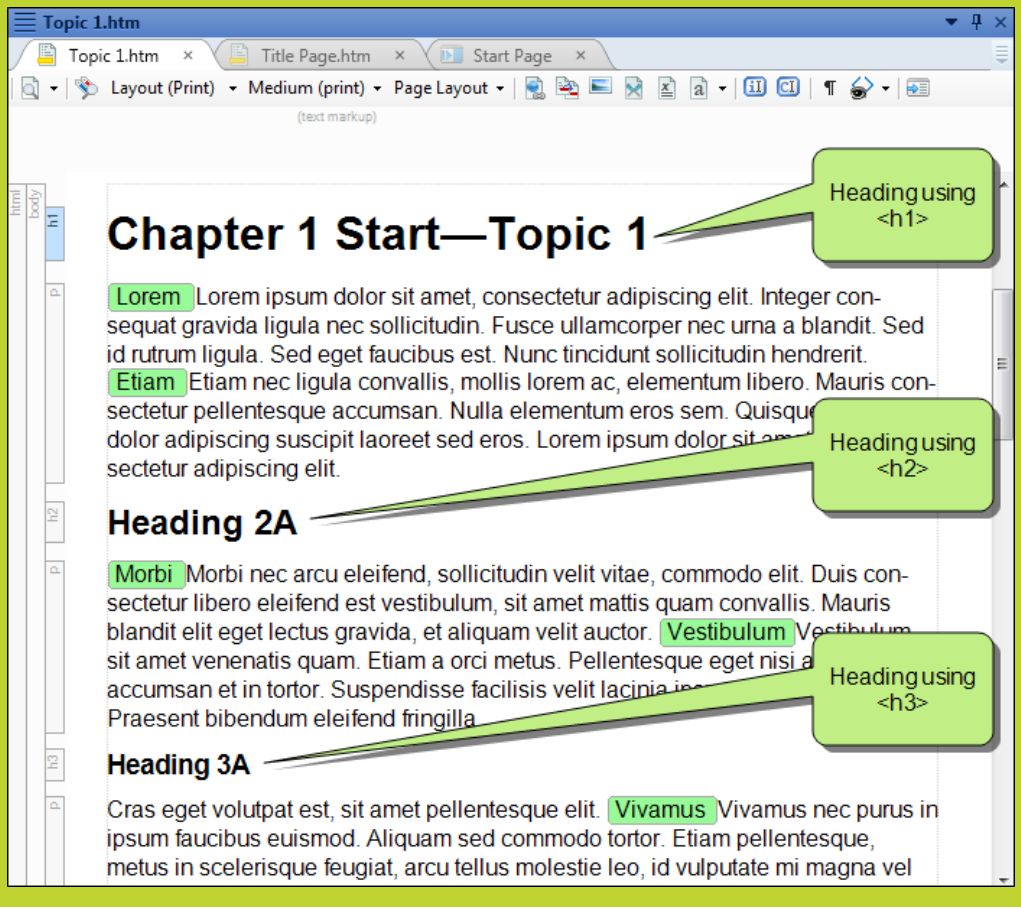
All other attributes for the generated glossary, index, and TOC can be controlled in your stylesheet.

EXAMPLE

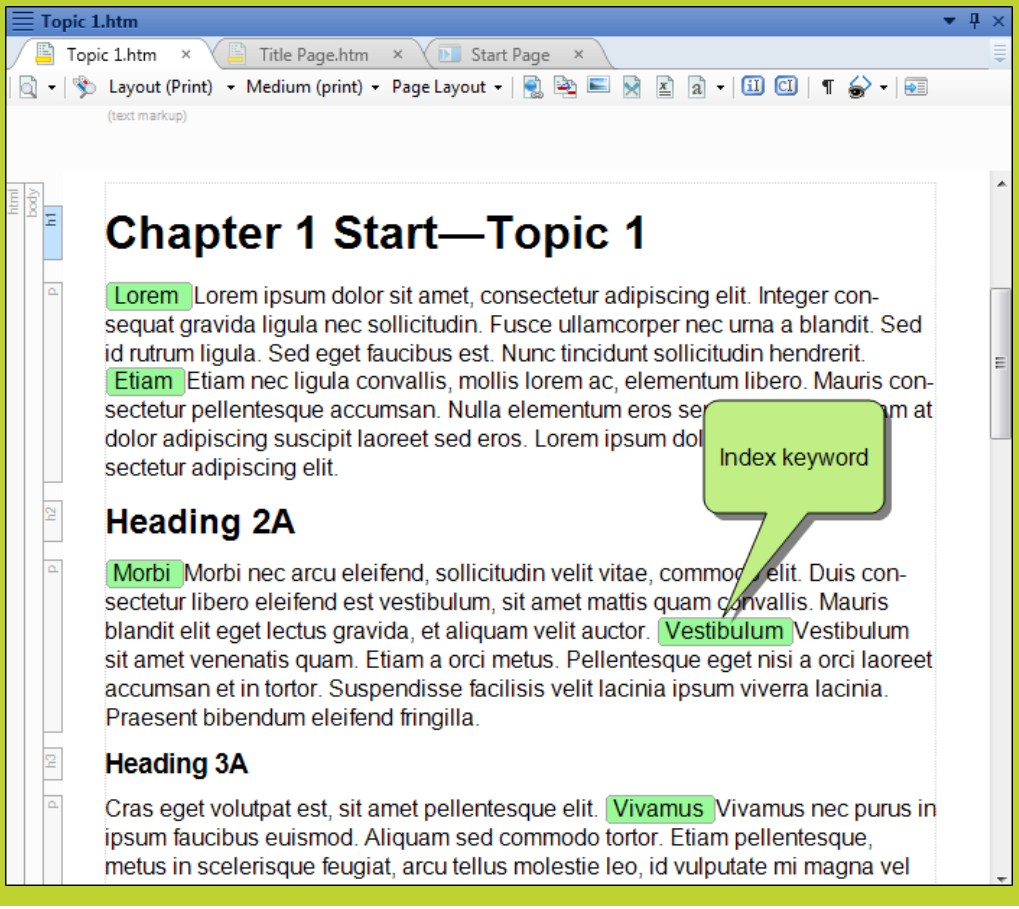
Let's say you need to create a PDF manual with five short chapters. You've created 17 topics that will make up those five chapters, and you've created a separate topic for a title page.



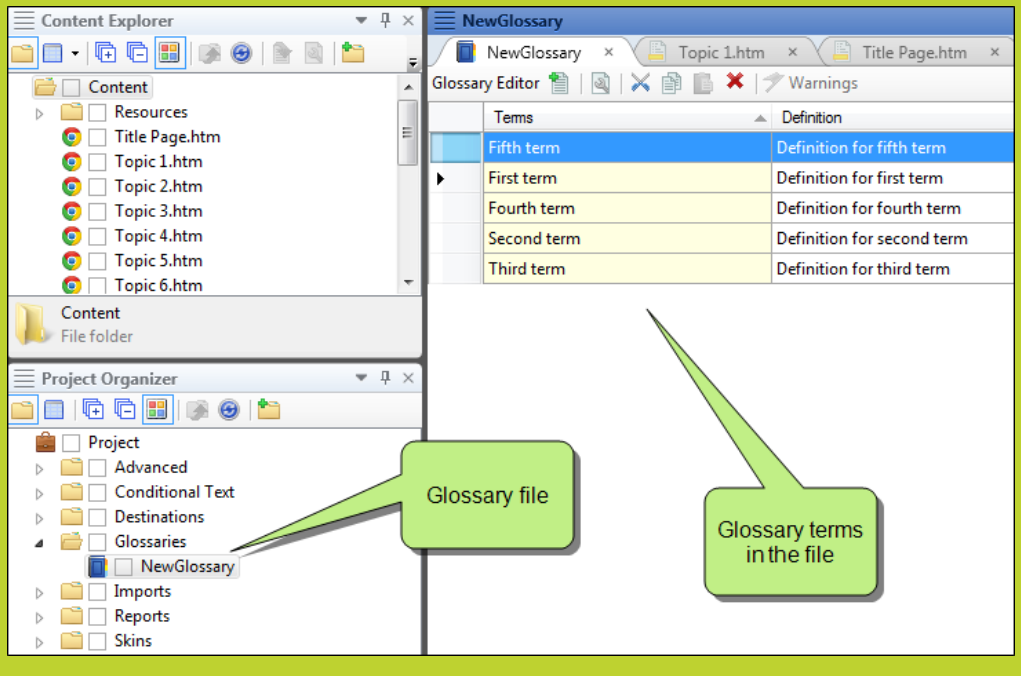
Your topics use <h1>, <h2>, and <h3> tags. These will become important when the TOC is generated.

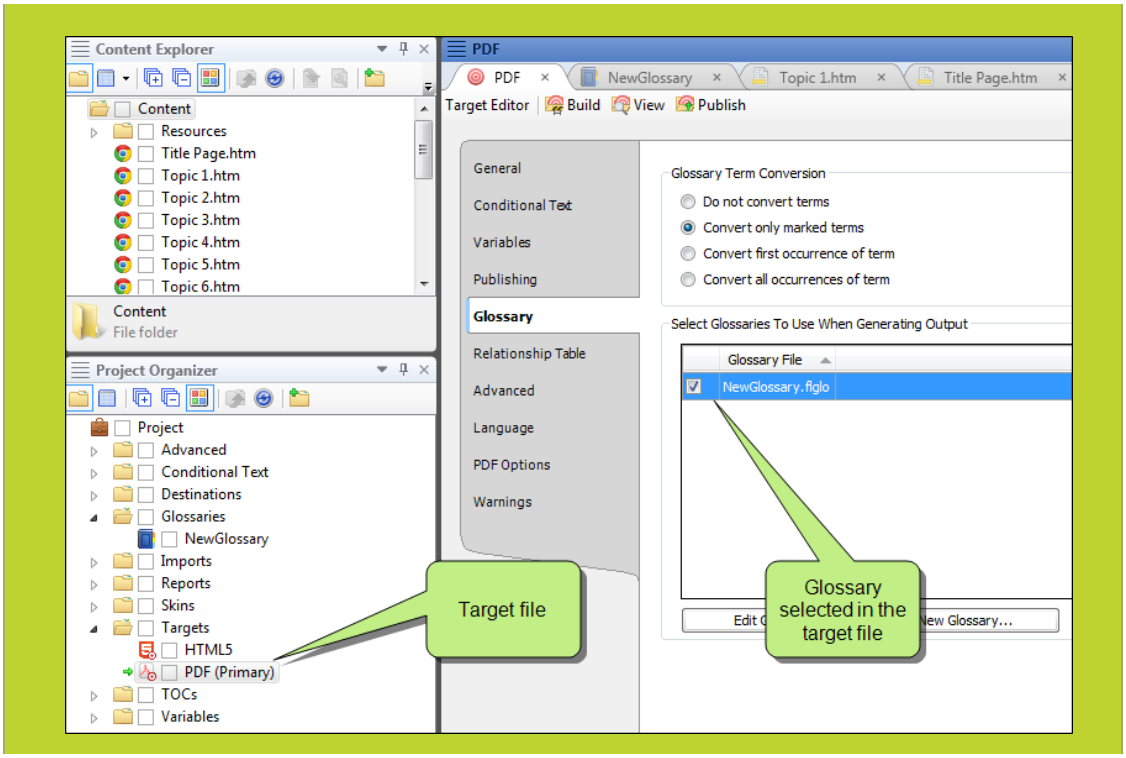


You've inserted index keywords throughout the topics. These will become important when the index is generated.

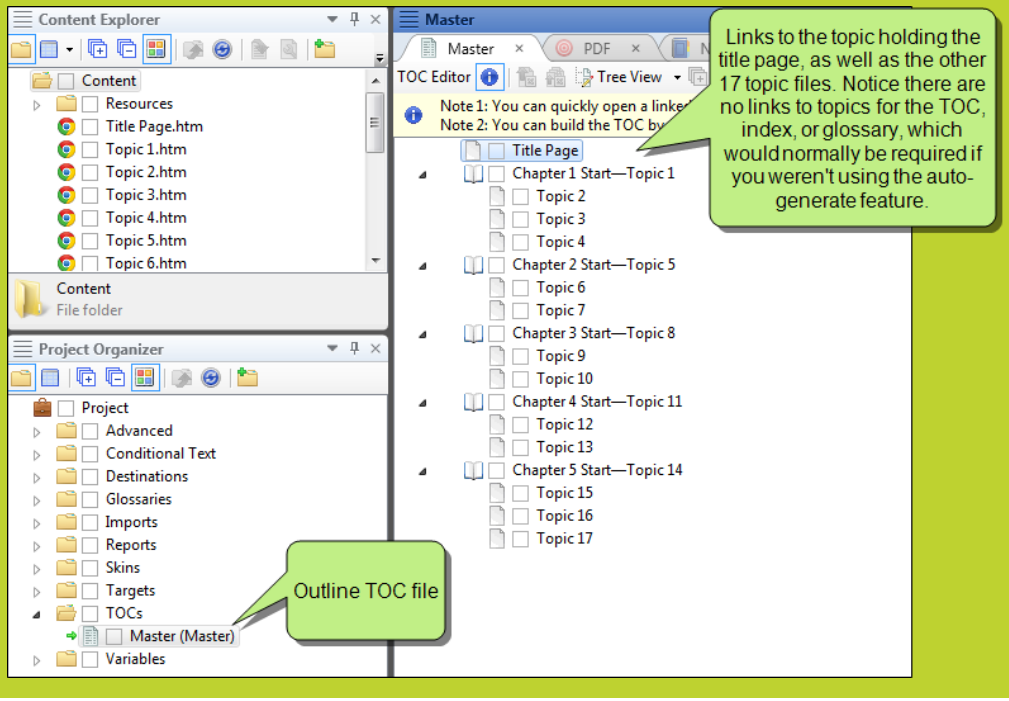


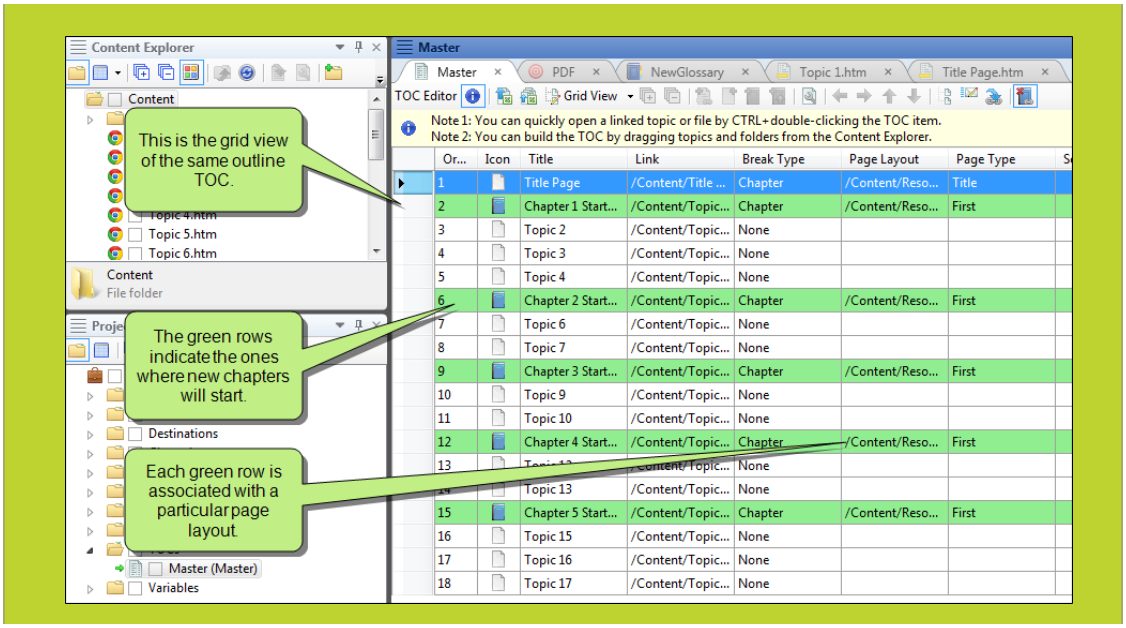
You've created a glossary file and associated it with the PDF target you're going to use. This will become important when the glossary is generated.



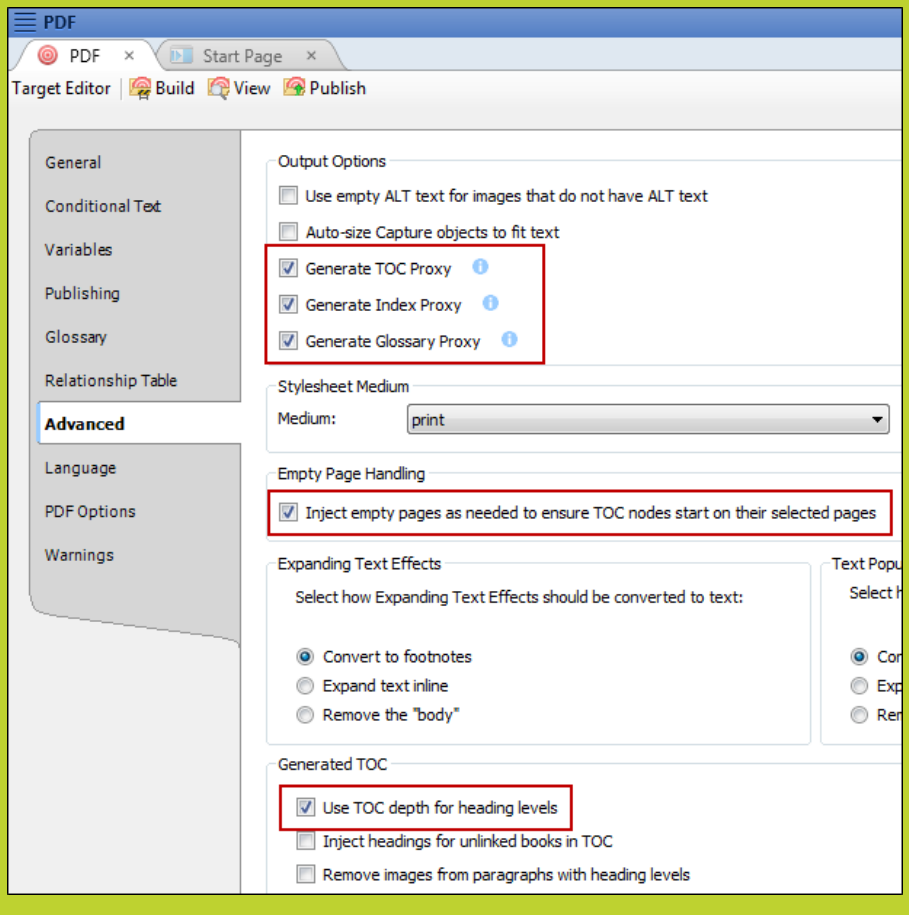

Content Explorer
Content
Resources
Title Page.htm
Topic 1.htm
Topic 2.htm
Topic 3.htm
Topic 4.htm
Topic 5.htm
Topic 6.htm
Content
File folder
Project Organizer
Project
Advanced
Conditional Text
Destinations
Glossaries
NewGlossary
Imports
Reports
Skins
Targets
HTML5
PDF (Primary)
TOCs
Variables
PDF
PDF
NewGlossary
Topic 1.htm
Title Page.htm
Target Editor
Build
View
Publish
General
Conditional Text
Variables
Publishing
Glossary
Relationship Table
Advanced
Language
PDF Options
Warnings
Glossary Term Conversion
Do not convert terms
Convert only marked terms
Convert first occurrence of term
Convert all occurrences of term
Select Glossaries To Use When Generating Output
Glossary File
NewGlossary.fglo
Target file
Glossary selected in the target file

You've put all of your topics into an outline TOC file. You've associated your title topic with one page layout, and you've assigned a different page layout to the five topics that will serve as the starting point for each of the five chapters.

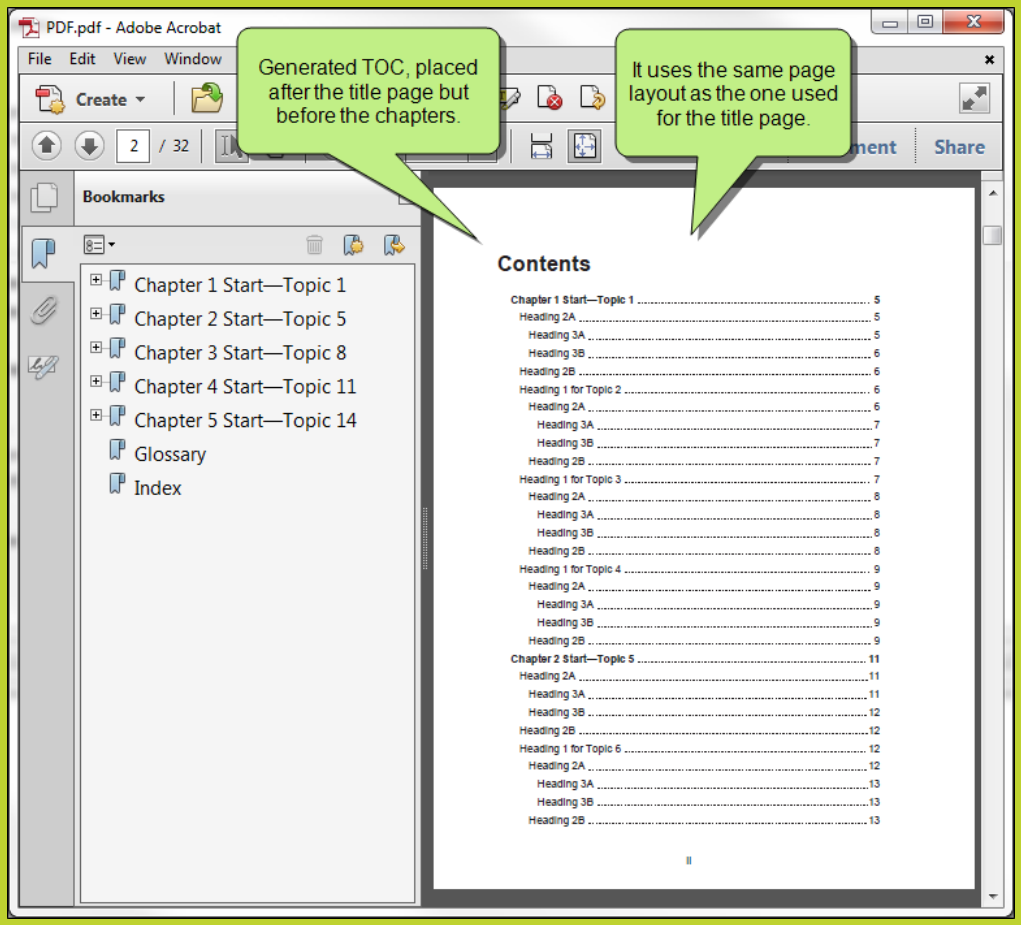


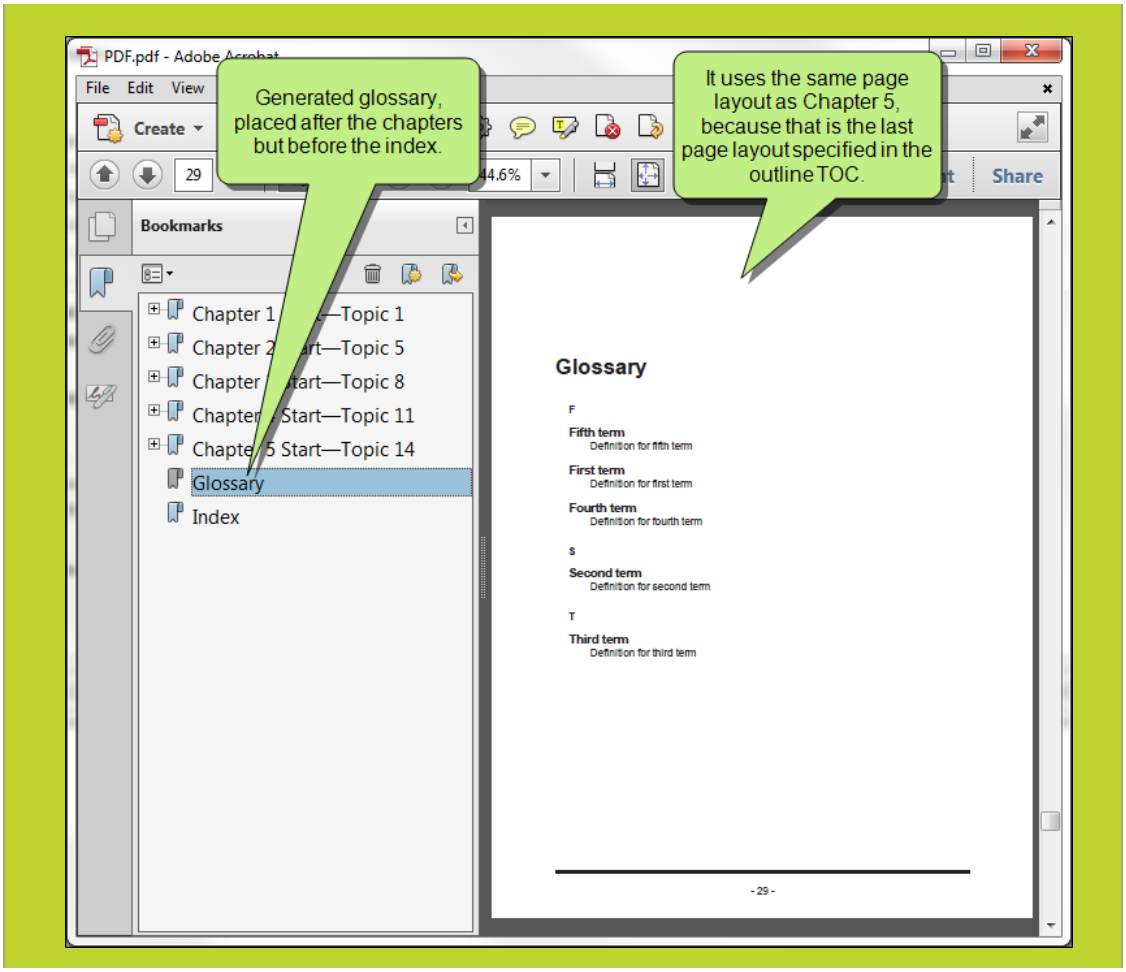

Content Explorer
Content
Topic 5.htm
Topic 6.htm
Content
File folder
Destinations
Master (Master)
Variables
Master
Master
PDF
NewGlossary
Topic 1.htm
Title Page.htm
TOC Editor
Grid View
Note 1: You can quickly open a linked topic or file by CTRL+double-clicking the TOC item.
Note 2: You can build the TOC by dragging topics and folders from the Content Explorer.
Or... Icon Title Link Break Type Page Layout Page Type
1 Title Page /Content/Title ... Chapter /Content/Reso... Title
2 Chapter 1 Start... /Content/Topic... Chapter /Content/Reso... First
3 Topic 2 /Content/Topic... None
4 Topic 3 /Content/Topic... None
5 Topic 4 /Content/Topic... None
6 Chapter 2 Start... /Content/Topic... Chapter /Content/Reso... First
7 Topic 6 /Content/Topic... None
8 Topic 7 /Content/Topic... None
9 Chapter 3 Start... /Content/Topic... Chapter /Content/Reso... First
10 Topic 9 /Content/Topic... None
11 Topic 10 /Content/Topic... None
12 Chapter 4 Start... /Content/Topic... Chapter /Content/Reso... First
Topic 13 /Content/Topic... None
15 Chapter 5 Start... /Content/Topic... Chapter /Content/Reso... First
16 Topic 15 /Content/Topic... None
17 Topic 16 /Content/Topic... None
18 Topic 17 /Content/Topic... None
This is the grid view of the same outline TOC.
The green rows indicate the ones where new chapters will start.
Each green row is associated with a particular page layout.

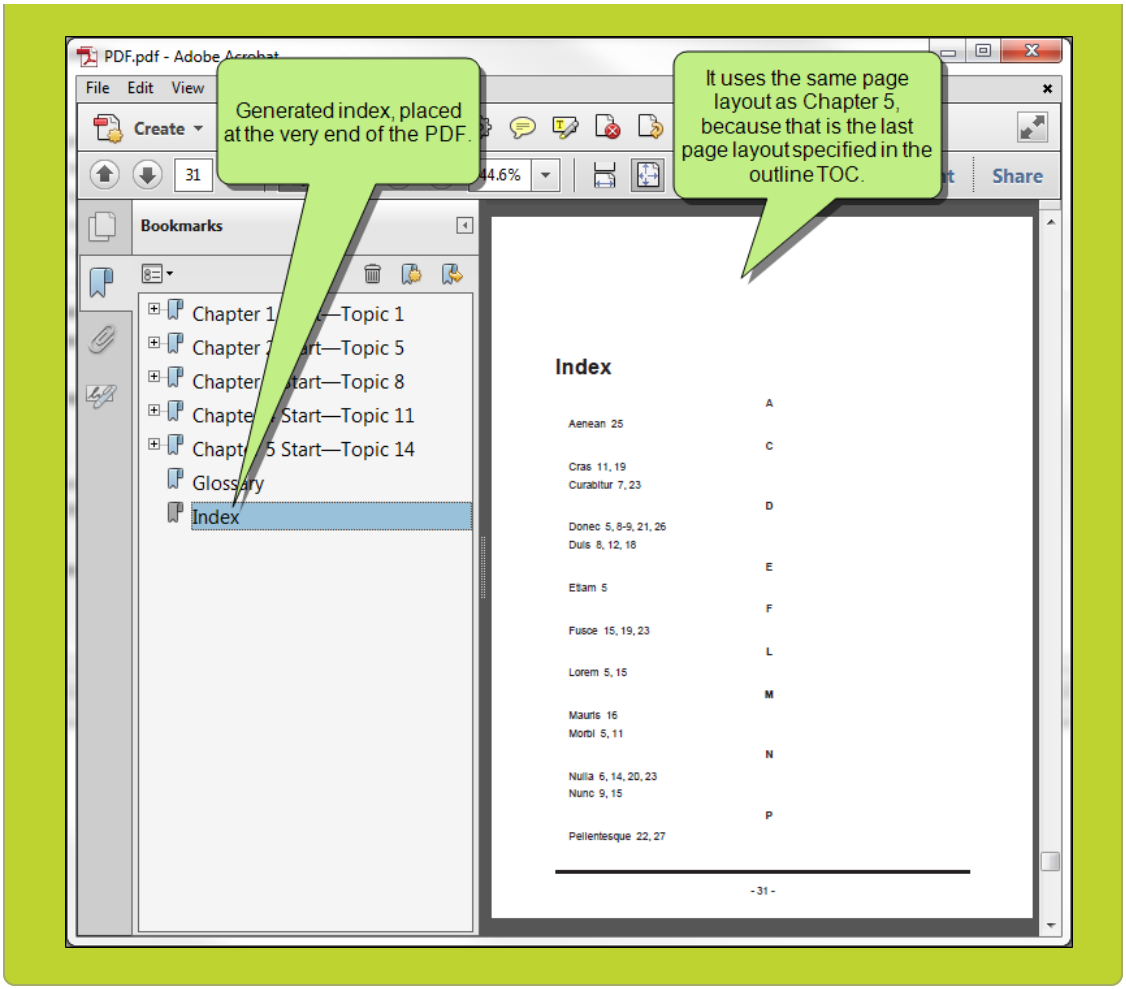
In the Target Editor, you select the **Advanced** tab and select **Generate TOC Proxy**, **Generate Index Proxy**, and **Generate Glossary Proxy**. In addition, you also select an option labeled **Inject empty pages as needed to ensure TOC nodes start on their selected pages** and another labeled **Use TOC depth for heading levels**. These last two options are not required to use the auto-generate feature, but they are popular options for generating print-based output.



After you generate the PDF output, it looks something like this:




PDF.pdf - Adobe Acrobat
File Edit View
Create
Share
Bookmarks
Generated glossary, placed after the chapters but before the index.
It uses the same page layout as Chapter 5, because that is the last page layout specified in the outline TOC.
Chapter 1 —Topic 1
Chapter 2 rt—Topic 5
Chapter tart—Topic 8
Chapter Start—Topic 11
Chapter 5 Start—Topic 14
Glossary
Index
Glossary
F
Fifth term
Definition for fifth term
First term
Definition for first term
Fourth term
Definition for fourth term
S
Second term
Definition for second term
T
Third term
Definition for third term
- 29 -

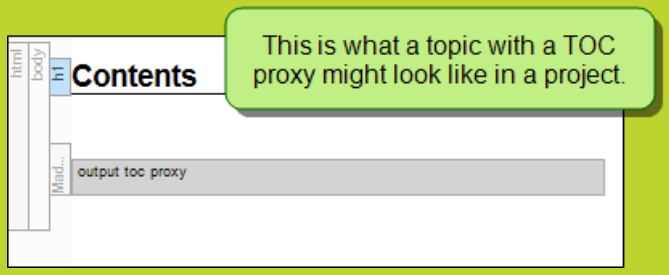


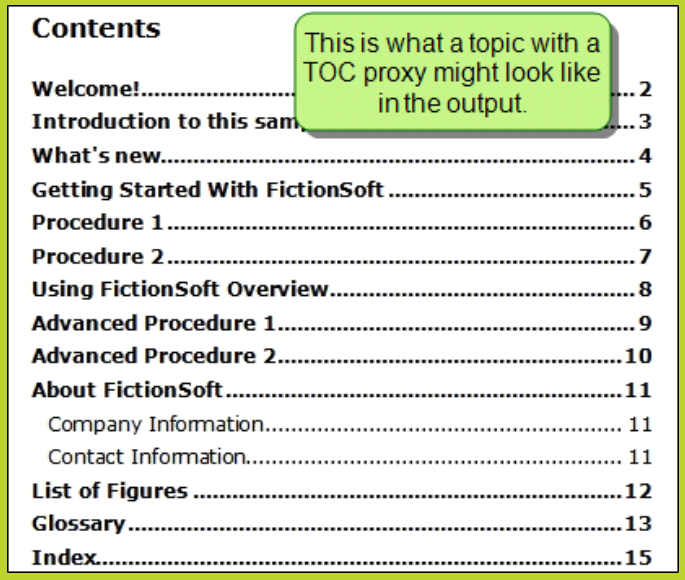
Note: In order for the generated TOC to be useful, you should have headings in your topics with the appropriate styles (i.e., <h1> through <h6>).

Creating a TOC Manually for Print

To create a TOC manually for print output, you need to create a unique topic and insert a TOC proxy into it.

EXAMPLE





HOW TO CREATE A TOC MANUALLY FOR PRINT

1. Add a new topic as you normally would.
2. At the top of the topic, enter a title for your TOC (e.g., "Contents").

> **Note:** You should be careful about using any of Flare's <h1> through <h6> style tags for your TOC title, unless you want it to also show up in the generated TOC. However, it is possible to configure your stylesheet so that certain <h1> through <h6> styles *do not* show up in the generated TOC. In the same way, it is possible to create other styles besides <h1> through <h6> and configure them so that they *do* show up in the generated TOC. For more information see "Determining Heading Levels for a Print TOC" on page 203.

3. Remove any unnecessary text after the topic title.
4. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>TOC Proxy**.
   - **Menu** Select **Insert>Proxy>Insert TOC Proxy**.

   The TOC Proxy dialog opens.
5. (Optional) From the **Stylesheet class** field, you can select a style for the TOC.

   For example, you might create and use style classes if you want to generate multiple TOCs with different looks for each output. Otherwise, the generated TOC in the output will use the style settings from the parent <MadCap|tocProxy> style. You can create a style class for this purpose in the Stylesheet Editor. To do this, select the **MadCap|tocProxy** style and click **Add Class** to create a class. The class will then be available from this field.

> **Note:** If you want to affect the look of the individual entries in the generated TOC, you can use the TOC1 through TOC9 styles (classes of the <p> tag) in the Stylesheet Editor. For example, if you want to use blue font for the first-level headings in the generated TOC, you can change the font color setting on the p.TOC1 style.

6. Click **OK**. The proxy is added to the topic.
7. Click to save your work.

AUTO-GENERATE VERSUS MANUAL PROXIES

The auto-generate method is much quicker and easier than the manual method. The manual method is more flexible but requires you to perform a number of extra steps, such as creating topics, inserting proxies, and adding files to the outline TOC. So if you simply want to quickly create print output with generated TOCs, glossaries, or indexes, the auto-generate option might be best for you. But if you want more control over the placement and look of the generated TOCs, glossaries, and indexes, you should use the manual method.

Make sure you include this topic in the "outline TOC" that is used for the target you are generating. See "Including Print Topics in an Outline TOC" on page 539.

Determining Heading Levels for a Print TOC

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

When creating print output, you can determine which topic headings will be displayed at which level in the generated TOC. For example, even though all of your topics may use a heading style of <h1>, you might want some of those topic headings to display at the first level in the print TOC (acting as an <h1>), others at the second level (acting as an <h2>), and still others at the third level (acting as an <h3>). This can be determined via one of the following methods:

- **TOC Depth** With this method, you can base the heading levels on the structure you create in the outline TOC.
- **Heading Styles** With this method, the structure of the generated TOC is based on the heading styles that you use in your topics and the "mc-heading-level" property setting for that style.

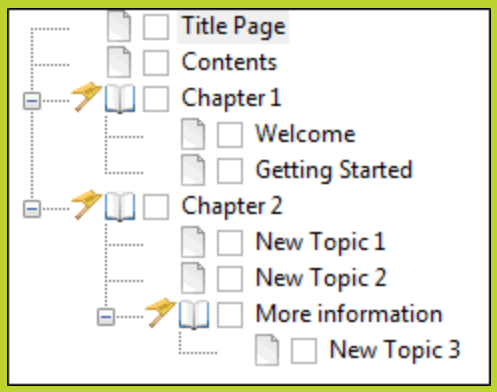
You might even use both methods for your print output. Maybe you decide to use the TOC depth to determine the heading levels. But you also migh use the mc-heading-level, setting it to 0 for certain styles (e.g., h3, h4, h5, h6) in order to limit the number of levels shown in the generated TOC.

TOC Depth Method

You can base the heading levels on the structure you create in the outline TOC. If a TOC entry is at the extreme left of the TOC Editor, it will display at the first level of the print TOC; if an entry is indented to the right one level, it will display at the second level; and so on. Not only will those headings be reflected in the generated TOC in the output, but the corresponding headings will be converted in the main body too (e.g., if a heading becomes an <h2> in the TOC, it will become an <h2> in the text as well).

E X A M P L E

Let's say the first paragraph in each topic that you create uses the <h1> style (except your title page and print TOC topic), and you structure the outline TOC like this:



If you do not use the depth feature, the print TOC will look like this in the output:

Welcome **2**

Getting Started **3**

NewTopic1 ..... **4**

NewTopic2 ..... **5**

NewTopic3 ..... **6**

But if you turn this feature on, the result will instead look like this in the output:

Welcome 2

Getting Started 3

NewTopic1 4

NewTopic2 5

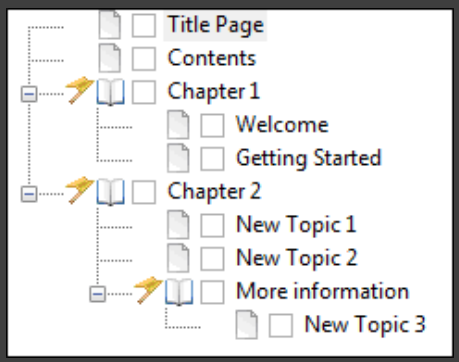
NewTopic3 5

Notice that "NewTopic3" is indented to the third level in the print TOC (because that is its position in the outline TOC). The other topics are at the second level. The books ("Chapter 1" and "Chapter 2") are at the first level, but they are not linked to topics; therefore, they are not included in the output. If you want the unlinked books to be included in the output, you can create headings for them (see the online Help for steps).

HOW TO USE TOC DEPTH FOR HEADING LEVELS

1. Open the target.
2. In the Target Editor, select the **Advanced** tab.
3. In the **Generated TOC** section, select **Use TOC depth for heading levels**.
4. Click to save your work.

Note: What happens if you are using classes of heading styles and then select the "Use TOC depth for heading levels option"? For example, let's say you have classes of your <h1> and <h2> heading styles. Suppose you created h1.Special (with a blue font), and h2.Special (with a red font). Meanwhile the primary <h1> and <h2> styles both use a black font. In your topics, you've applied your heading style classes to some heading content. And in your outline TOC, you organized the structure like this:



Because you selected the option to use TOC depth for heading levels, some of the level-1 headings will become level-2 headings or even level-3 headings in the output. If you have headings where you used h1.Special but their level in the output was not affected (i.e., they remain as level-1 headings), they will keep the properties from the style class. In other words, they will stay blue. But if the structure of the outline TOC causes them to become level-2 headings in the output, they will take on the properties of the h2.Special tag—because the class has the same name ("Special") as its <h1> counterpart. Therefore, those headings will have a red font. However, let's say that your level-2 class was named something different (e.g., h2.Red). In that case, h1.Special headings that are pushed to become level-2 headings will instead use properties from the main <h2> tag. In other words, they will have a black font—not blue like h1.Special and not red like h2.Red.

Heading Styles Method

The mc-heading-level property is used to indicate a TOC level for a style. This property is already set to 1 for <h1> styles, 2 for <h2> styles, 3 for <h3> styles, and so on. Therefore, you can simply use the <h1> through <h6> styles provided by Flare in your content. You can also set the mc-heading-level property to the appropriate depth level for any paragraph style that you want to use as a heading. In the output, the print TOC will display styles with an mc-heading-level value of 1 at the highest (far left) level, those with a value of 2 at the next level, and so on (regardless of the structure of the outline TOC).

E X A M P L E

Let's say that you have applied <h1>, <h2>, and <h3> styles to headings in your topics, but you only want the headings with <h2> and <h3> styles to be included in the print TOC (omitting <h1> headings from the print TOC). You can do this by designating the level of the "mc-heading-level." A level of 0 means the heading is not included in the print TOC, a level of 1 means that it is included at the highest level in the TOC hierarchy (farthest to the left), a level of 2 means that it is included at the second highest level in the TOC hierarchy, and so on. Therefore, for this example, you might set the mc-heading-level for the <h1> style to 0. And if you want to move the <h2> and <h3> headings up a level, you could set the mc-heading-level property for <h2> to 1, and the property for <h3> to 2.

HOW TO USE STYLES FOR HEADING LEVELS

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. Make sure the appropriate medium is selected. If you are not using stylesheet mediums for your different outputs or if you want all mediums to have the same settings, just leave the medium set to "default" and continue.

   Mediums can be used if you want to use one group of settings for online output types (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and another group of settings for print-based output types (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). For example, you might use the "default" medium for your online outputs and you might use the "print" medium for your print outputs.
3. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.
4. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Heading Styles.
5. From the area below, select the <h1> through <h6> style (h1, h2, h3, h4, h5, h6) that you want to customize.

   If you created other custom styles for your headings (e.g., p.MyIndexHeading), you can select those styles instead (you may first need to switch to a view that shows all paragraph styles). The mc-heading-level property (which is the property that determines the heading level in a print TOC) can be applied to any paragraph style.

6. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
7. In the **Properties** section, expand the **PrintSupport** group.
8. Click in the right column next to **mc-heading-level** and select the level for the heading style (e.g., 0, 1, 2, 3). The higher the number, the lower in the hierarchy the heading will be displayed in the print TOC. If you select 0, the heading will not be included in the print TOC.
9. Click to save your work.

Make sure you apply the styles to be used in the generated TOC to the appropriate headings in your content.

Variables

This feature is supported in all outputs.

Variables are pre-set terms that you can use in your project over and over. They are stored in variable sets, which can hold multiple variables. Depending on the template you select when creating a project, Flare may provide you with an initial variable set, but you can add as many additional variable sets as you like.

Variables are used for brief, non-formatted pieces of content (such as the name of your company's product or your company's phone number). There are different kinds of variables: (1) basic ones that you create, (2) custom date/time variables that you create, (3) system variables (e.g., date and time; titles; page count; Chapter, Section, and Volume numbers), (4) Heading variables, and (5) Running Head variables. Some of these are especially useful for page headers and footers in print-based output.

Variable Components

A variable has two main components—the variable *name* and the variable *definition*.

E X A M P L E

An example of a variable name is "CompanyName." The definition for that variable name might be "ACME Incorporated." Using that example, if you were to insert the CompanyName variable into a paragraph of a topic, the phrase "ACME Incorporated" would be added at that spot and shown in the output.

Types of Variables

Following are the main categories of variables that you can use.

- **Custom Basic Variables** These are basic variables that you can create in variable sets. They can be used for virtually any purpose (product names, company information, terms that are used frequently). See "Creating New Variables" on page 215.
- **Custom Date/Time Variables** You can create date and time variables based on Microsoft's "Custom Date and Time Format Strings." See "Creating Custom Date/Time Variables" on page 217.
- **System Variables** Flare lets you insert the system date and time as variables. The global format in windows controls the format dates and times in variables. To insert a system variable, simply select **Insert>Variable**. Then select **System** and choose the specific variable. In addition, for Adobe PDF, Microsoft XPS, and XHTML output, you can insert system variables in page layout frames that display your chapter, section, or volume numbers (if you are using autonumbers to identify the various parts of a manual). See "Chap/Sec/Vol Variables in Frames" on page 430.
- **Heading Variables** You can insert Heading variables into page layouts or master pages in order to automatically display text based on the <h1> through <h6> heading styles that you use in your project. Like Running Head variables, they are useful when creating print-based output. It's an easy way, for example, to automatically display a chapter title in the header of a chapter. For Adobe PDF, Microsoft XPS, and XHTML output, you can also use Heading variables to automatically display glossary headings/terms and index headings/terms in a page layout frame. See "Heading Variables" on page 219.
- **Running Head Variables** In addition to system variables and those you can create (from the "MyVariables" template), you can also add Running Head variables (using the "Running HF" template). A Running Head (or Running HF) variable is a special variable that you can insert into a header or footer in a page layout or a print master page. It lets you display certain text in the header or footer automatically, based on the style associated with the variable. For example, Running Head variables are useful if you want to include the title of each chapter in a document in a header or footer without having to type them into multiple pages. For more information see "Running Head Variables" on page 221.

Note: Running Head variables are supported only in Adobe FrameMaker and Microsoft Word output.

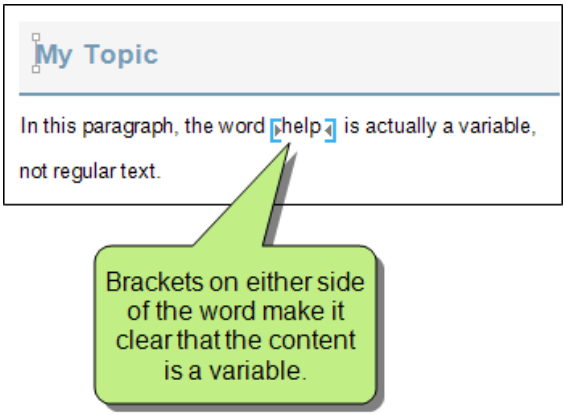
Visual Cues for Variables

When you insert variables into content, there are a few ways to discern that certain content is actually a variable, as opposed to regular text.

MARKERS

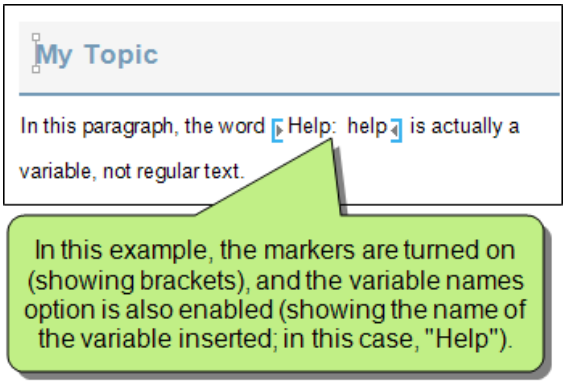
First, markers can be turned on or off, providing a visual cue about the content in the form of brackets. When you insert a variable into a topic with markers turned on, the variable definition is displayed in a marker represented by brackets on either side of the definition. If you cannot see all of the information in a marker, you can adjust the marker width. (Click the down arrow next to the **Show tags** button in the XML Editor. The marker width field is at the bottom of the drop-down menu.)

Here is an example of a variable with markers turned on. (To turn markers on, click the down arrow next to the **Show tags** button in the XML Editor. Then select **Show Markers**.)



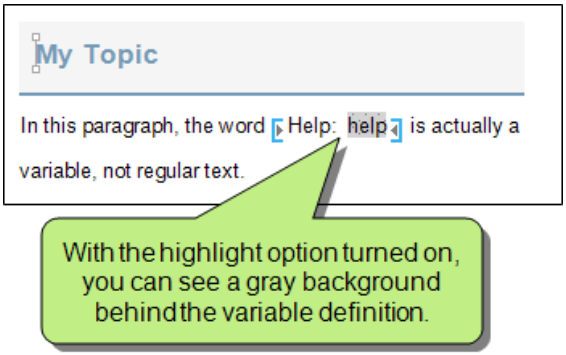
VARIABLE NAMES

In addition to markers, you can select an option to show variable names. Here is an example of a variable with variable names turned on. (To show variable names, click the down arrow next to the **Show tags** button in the XML Editor. Then select **Show Variable Names**.)



HIGHLIGHTED NAMES

You can also select an option to display variables with a highlighted background.(To highlight variables, click the down arrow next to the **Show tags** button in the XML Editor. Then select **Show Highlight Variables**.) Here is an example.



Tasks Associated with Variables

Following are the main tasks involved with using variables.

- **Add Set** You can use the initial variable set provided in a template, but you can add more variable sets if necessary. Each variable set can hold multiple variables. See "Adding Variable Sets to Projects" on the next page.
- **Create** You can create custom variables within a variable set. See "Creating New Variables" on page 215 and "Creating Custom Date/Time Variables" on page 217.
- **Insert** You can insert variables into topics (as well as other elements, such as snippets or page layout frames). See "Inserting Variables" on page 224, "Chap/Sec/Vol Variables in Frames" on page 430, "Inserting Heading Variables Into Frames" on page 433, and "Inserting Running Head Variables into Frames" on page 440.
- **Edit** After you create a variable, you can easily edit it in the Variable Set Editor. If you change the definition for a variable that has been inserted into topics, the changes will automatically be reflected in all those topics. For more information see the online Help.

Adding Variable Sets to Projects

The following steps show you how to add a new variable set to your project. You can then open the variable set and create new variables.

HOW TO ADD A VARIABLE SET TO A PROJECT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Variable Set**.
   - **Menu** Select **Project>Add Variable Set**.
   - **Right-click** In the Project Organizer, right-click on the **Variables** folder and from the context menu select **Add Variable Set**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Variable Set** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

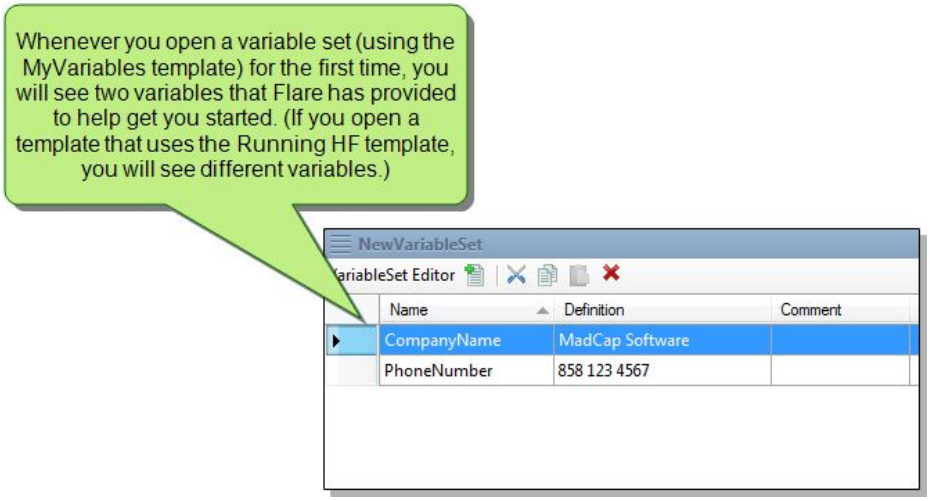
     Note: In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.
   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the 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 variable set.
6. Click **Add**. The variable set is added to the Variables folder in the Project Organizer. The Variable Set Editor opens to the right, with the variable entries shown.

Creating New Variables

The following steps show you how to create a new variable within a variable set.

HOW TO CREATE A NEW VARIABLE

1. Make sure the Project Organizer is open.
2. Double-click the **Variables** folder.
3. Double-click a variable set, such as the initial one provided by Flare. If you do not have any variable sets in the folder, you can easily add one using the File ribbon. The Variable Set Editor opens to the right, with the variables page shown. If you use the "MyVariables" template, Flare provides you with two variables (CompanyName and PhoneNumber) to get you started. You can delete these variables or modify them to suit your needs.



4. To create an additional variable, click in the local toolbar. A new variable row is added, with a temporary name for the variable.

5. To enter a new name, definition, or comment for a new variable (or for the variables already provided by Flare), do one of the following.
   - Double-click in a field and type the name, definition, or comment.

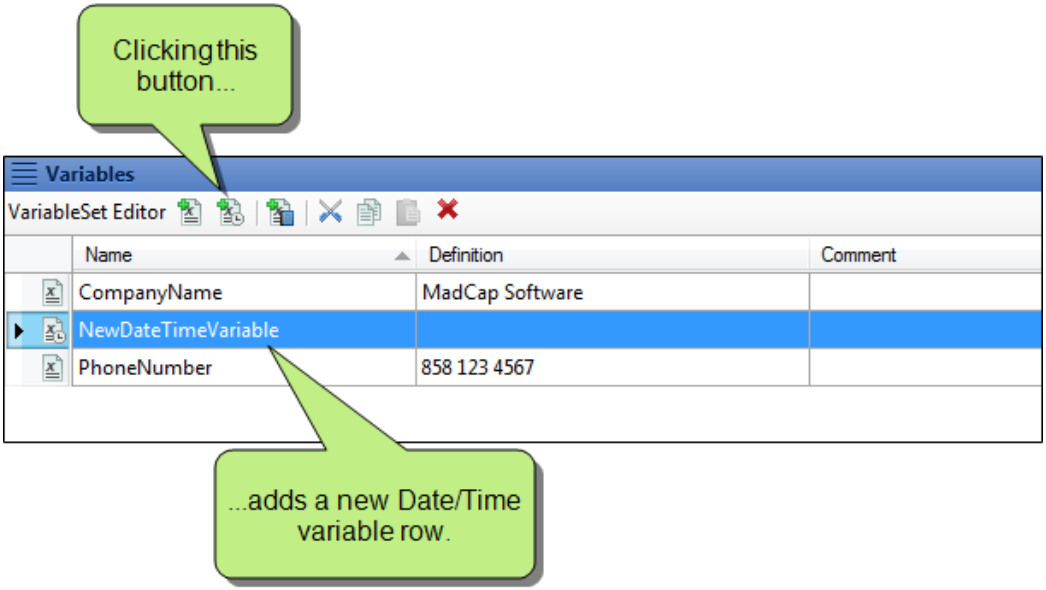
     OR
   - Click once in a field and press **F2** on your keyboard. Then type the name, definition, or comment.
6. Click to save your work.

Creating Custom Date/Time Variables

You can create date and time variables based on Microsoft's "Custom Date and Time Format Strings."

HOW TO CREATE CUSTOM DATE/TIME VARIABLES

1. In the Project Organizer, expand the **Variables** folder and double-click a variable set. The Variable Set Editor opens.
2. In the local toolbar click . A new row is added for the Date/Time variable.



3. To enter a new name or comment, do one of the following:
   - Double-click in the appropriate cell and type the name or comment.

     OR
   - Click once in the appropriate cell and press **F2** on your keyboard. Then type the name or comment.
4. Click in the **Definition** cell. The Edit Format dialog opens.

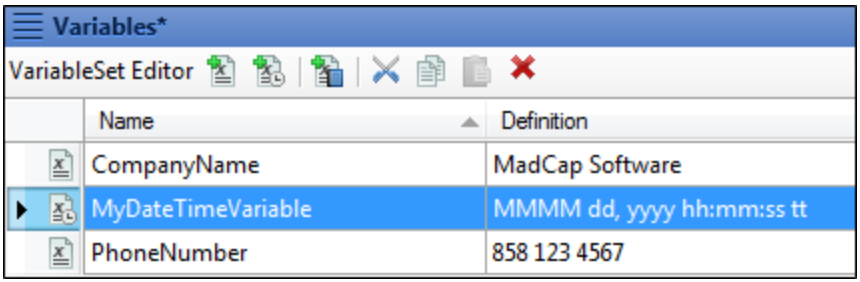
5. In the field, enter a combination of format specifiers. As you do this, current date and time are displayed below the field in that format.

   Specifiers are based on Microsoft's custom date and time format strings. For details of the specifiers available, see http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx.

   Here are some of the more common specifier combinations:

Specifier Combination	Result
MMMM dd, yyyy hh:mm:ss tt	July 09, 2013 03:55:53 PM
hh:mm:ss tt dd MMMM, yyyy	03:55:53 PM 09 July, 2013
dddd MMMM dd, yyyy	Tuesday July 09, 2013
ddd MM/dd/yy	Tue 07/09/13

6. Click **OK**. It might look something like this:



7. Click to save your work.

Note: If you want to edit a date/time variable, click on the **Definition** cell in the Variable Set Editor and make changes in the Edit Format dialog. You can also add multiple definitions to a variable, using them as a way to override variables on a target.

Note: Like standard variables, you can override custom date/time variables in a target.

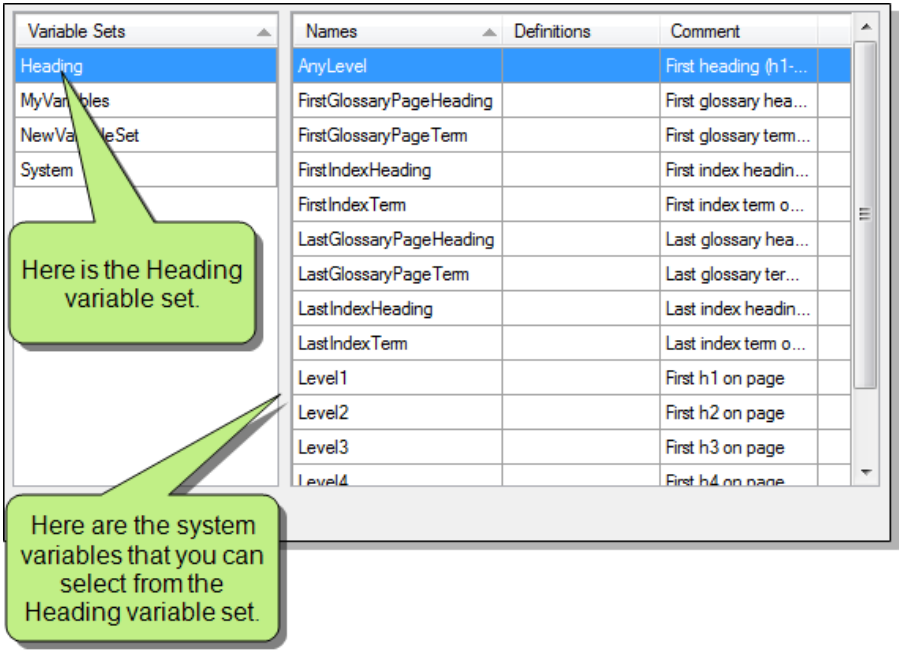
Heading Variables

This feature is supported in all online (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, and WebHelp Plus) and print (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML) outputs.

You can insert Heading variables into page layouts or master pages in order to automatically display text based on the <h1> through <h6> heading styles that you use in your project. Like Running Head variables, they are useful when creating print-based output. It's an easy way, for example, to automatically display a chapter title in the header of a chapter. For Adobe PDF, Microsoft XPS, and XHTML output, you can also use Heading variables to automatically display glossary headings/terms and index headings/terms in a page layout frame.

Heading variables are very similar to Running Head variables. The key appeal of Running Head variables is that they are supported in FrameMaker and help with the transition of authors from FrameMaker to Flare. So people who are familiar with FrameMaker might prefer to use Running Head variables because they are used to them. However, Heading variables are somewhat easier to use and therefore are recommended for people who do not have a FrameMaker background.

When you insert a variable, simply select the **Heading** variable set to access the available variables. You can then choose the appropriate variable on the right side of the dialog. For more information and explanations of the different Heading variables, see "Inserting Heading Variables Into Frames" on page 433 and "Inserting Heading Variables Into Master Pages" on page 530.


Variable Sets
Heading
MyVariables
NewVariableSet
System
Names
Definitions
Comment
AnyLevel
First heading (h1-...
FirstGlossaryPageHeading
First glossary hea...
FirstGlossaryPageTerm
First glossary term...
FirstIndexHeading
First index headin...
FirstIndexTerm
First index term o...
LastGlossaryPageHeading
Last glossary hea...
LastGlossaryPageTerm
Last glossary ter...
LastIndexHeading
Last index headin...
LastIndexTerm
Last index term o...
Level1
First h1 on page
Level2
First h2 on page
Level3
First h3 on page
Level4
First h4 on page
Here is the Heading variable set.
Here are the system variables that you can select from the Heading variable set.

Running Head Variables

This feature is supported in Adobe FrameMaker and Microsoft Word output.

A Running Head (or Running HF) variable is a special variable that you can insert into a header or footer in a page layout or a print master page. It lets you display certain text in the header or footer automatically, based on the style associated with the variable. For example, Running Head variables are useful if you want to include the title of each chapter in a document in a header or footer without having to type them into multiple pages.

Heading variables are very similar to Running Head variables. The key appeal of Running Head variables is that they are supported in FrameMaker and help with the transition of authors from FrameMaker to Flare. So people who are familiar with FrameMaker might prefer to use Running Head variables because they are used to them. However, Heading variables are somewhat easier to use and therefore are recommended for people who do not have a FrameMaker background.

Default Running Head Variables

Flare provides the following default Running Head variables.

Variable Name	Variable Definition
Running H/F 1	<$paratext[h1]>
Running H/F 2	<$paratext[h2]>
Running H/F 3	<$paratext[h3]>
Running H/F 4	<$paratext[h4]>
Running H/F 5	<$paratext[h5]>
Running H/F 6	<$paratext[h6]>

You can add an additional six variables like this so that there are 12 all together (Adobe FrameMaker supports 12). If you add more variables than the six provided, they should follow the same naming convention (i.e., Running H/F 7, Running H/F 8, Running H/F 9, and so on).

Using Other Styles in Running Head Variables

As you can see by looking at the variable definitions in the list, these variables are based on the <h1> through <h6> heading styles provided in Flare. You should not change the variable name or the first part of the definition. However, you can change the style within the definition if you want to use something other than one of the <h1> through <h6> heading styles provided (e.g., you can change <$paratext[h1]> to <$paratext[someOtherStyle]>). The style name used in the variable definition must match the style name that results from generating the output. If you create a style class, this means using an underscore in the variable definition. See "Styles and Stylesheets" on page 228.

EXAMPLE

If you have an <h1> tag with a class called "title" in Flare, the style name generated for the corresponding paragraph in FrameMaker will be "h1_title" (not h1.title, as it is in Flare). Therefore, you would change the variable definition to <$paratext[h1_title]>.

Which Style Text is Displayed?

When you insert a Running Head variable into a page layout frame or master page, Flare will insert the text from the first occurrence of the specified style on that page. If it doesn't find any text using that style, it will use the text from the previous occurrence of that style.

EXAMPLE

If you want the header in chapters to display content that is using the h1 style (perhaps you are using this style to display the chapter title for your output), select the **Running H/F 1** variable. The header will then display the first <h1> content that it finds in the document (e.g., "My First Chapter Title"). When the next occurrence of the <h1> style appears on another page, the heading changes to display that text (e.g., "My Second Chapter Title"), and so on.

Steps for Using Running Head Variables

If you want to incorporate Running Head variables into your output, use the following steps.

1. **Add Variable Set** When you do this, make sure to select the Running HF template. See "Adding Variable Sets to Projects" on page 214.
2. **Insert Running Head Variables** You can insert these variables into headers or footers within page layout frames or print master pages. See "Inserting Running Head Variables into Frames" on page 440 or "Inserting Running Head Variables Into Master Pages" on page 532.

Note: An alternative to Running Head variables, and perhaps an easier one, is to use Heading variables. See "Heading Variables" on page 219.

Inserting Variables

After you create or modify variables, you can insert them into any content file (e.g., topic, snippet) in your project. You can insert variables by dragging them from the Project Organizer, or you can use the Variables dialog.

HOW TO INSERT A VARIABLE BY DRAGGING AND DROPPING

1. Open the content file (e.g., topic, snippet).
2. Make sure the Project Organizer is open.
3. Expand the **Variables** folder and expand the appropriate variable set under it.
4. Click on the variable and drag it to the XML Editor.
5. Click to save your work.

HOW TO INSERT A VARIABLE BY USING THE VARIABLES DIALOG

1. Open the content file (e.g., topic, snippet).
2. Place your cursor where you want to add a variable.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single-Source** section select **Variable**.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** On your keyboard press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.

   > **Note:** If a variable contains multiple definitions, the default definition is displayed in the Definitions column. The additional definitions are not shown. You can view and select alternative definitions from a drop-down list in the Target Editor when overriding definitions.

4. On the left, select the appropriate variable set.
5. On the right, select the variable you want to insert.
6. Click **OK**. The variable is added, with brackets surrounding it. The bracket shows the variable name and the variable definition (as long as markers are turned on and the set marker width allows it).

You can adjust the marker width from the **Show tags** button to see more or less of the variable information, and you can also tell Flare to turn off the variable names so that you only see the variable definition. For more details about markers see the online Help.

7. Click to save your work.

CHAPTER 4

Making It Look Good

There are numerous features for "dressing up" your output.

This chapter discusses the following:

Styles and Stylesheets 228
Local Formatting 251
Autonumbers 252
Object Positioning 272
Paragraph Formatting 279

Styles and Stylesheets

One of the most important aspects of Flare is the use of styles and stylesheets. Quite simply, styles are the best, most efficient way to affect the look of your output.

For more details about using styles see the online Help or the Flare *Styles PDF Guide* (see "PDF Guides" on page 651).

Styles are elements that contain formatting settings. You can apply styles to your content to change the way it looks. Flare works with cascading stylesheet (CSS) rules that are specified by the World Wide Web Consortium, or W3C (http://www.w3.org).

E X A M P L E

The heading above is using the <h2> style tag (which is short for a second-level heading). Properties have been assigned to this style to affect its look (such as Arial, 12 pt, bold). We can apply this style to any block type of content (e.g., headings or paragraphs). If we were to change the color to green in the style, every heading or paragraph in the project that uses that style would change to green immediately.

An important aspect of CSS is that it is based on community-wide standards set by the W3C. This means that CSS can be used for any XML-based tool, not just Flare. Tools such as Microsoft Word and Adobe FrameMaker also use styles, but they are proprietary, which means they can be used only within that application.

Note: If you would like to access the same stylesheet that is used for the Flare documentation, you can download it from this location:

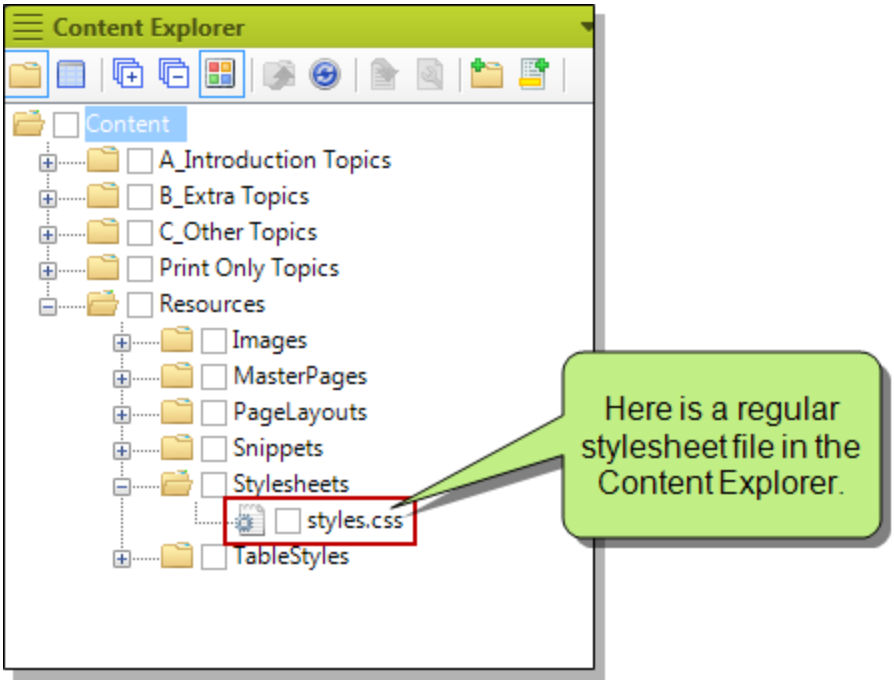
http://docs.madcapsoftware.com/FlareV10/styles.css

After downloading this file, you can save it to any location you want. For example, if you already have a project where you want to use it, you can navigate to the folder where that project is stored in Windows and save the stylesheet in the Content\Resources\Stylesheets subfolder.

About Regular Stylesheets

A regular stylesheet lets you store styles for general content in your project, including tables, to control how that content looks. A table stylesheet, on the other hand, is used *only* for tables. See "About Table Stylesheets" on page 235.

You can have as many styles as you want within one regular stylesheet, and you can create as many stylesheets as you need (although one stylesheet is often sufficient for most authors and most projects). The traditional location to store a regular CSS stylesheet in the Content Explorer is in the Resources\Stylesheets folder. However, you can store it anywhere in the Content Explorer that you like.



The exception to this is when you import source files that already include a stylesheet. In that case, Flare retains the structure of the imported files, storing the stylesheet in the same location where it resided in the source files.

Stylesheet Editor

When you open a regular stylesheet, it is displayed in the Stylesheet Editor, which allows you to use either an "Advanced" view or a "Simplified" view when working with topic styles.

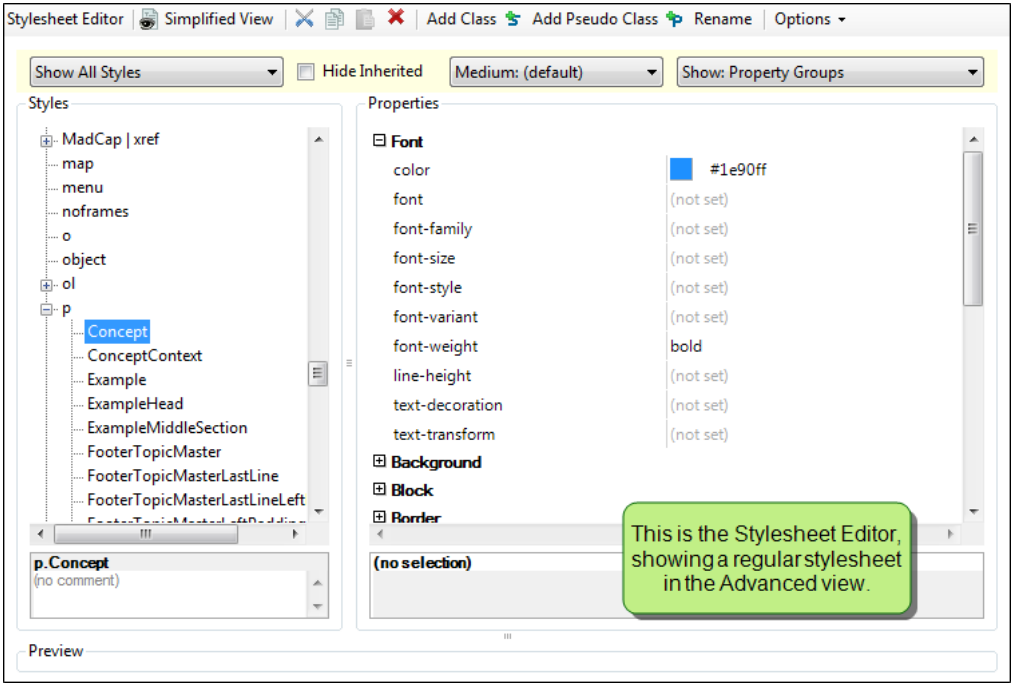
- **Simplified** The Simplified view is often best for newer users. It provides an easier way to apply properties to styles, with format options available from a toolbar (similar to the way one would use the Text Format toolbar to change the look of topic content without a style). In some cases, only the most common property options are available in the Simplified view (e.g., font, letter/word spacing, paragraph alignment/indentation, autonumbering format, borders, background). One advantage of the Simplified view is that you can apply a property to multiple styles at the same time. You can also click a check box to hide the properties in the editor, allowing you to see only the styles.
- **Advanced** The Advanced view displays style classes and properties in hierarchical tree structures. For beginners, it is not as quick and easy to use as the Simplified view, but it allows you to edit more settings than are available in the Simplified view.

This is the Stylesheet Editor, showing a regular stylesheet in the Simplified view.

Stylesheet Editor | Advanced View | Add Class | Add Pseudo Class | Rename | Options

Show All Styles | Hide Inherited | Hide Properties | Medium: (default)

Name	Tag	Class	Pseudo Class	Preview	Comment
MadCap | xref.I...	MadCap | xref	IndexPageNum...		MadCap Softv	
MadCap | xref.L...	MadCap | xref	ListOfPageNu...		MadCap Softv	
MadCap | xref.T...	MadCap | xref	TOCPageNum...		MadCap Softv	
ol	ol			MadCap S	
ol.LowerAlpha	ol	LowerAlpha		MadCap Software	
ol.LowerRoman	ol	LowerRoman		MadCap Software	
p	p			MadCap Software	
p.Concept	p	Concept		MadCap Softwa	
p.ConceptCont...	p	ConceptContext		MadCap	
p.Example	p	Example		MadCap Software	
p.ExampleHead	p	ExampleHead		MadCap S	
p.ExampleMidd...	p	ExampleMiddle...		MadCap Software	
p.FooterTopic...	p	FooterTopicMa...		MadCap Software	
p.FooterTopic...	p	FooterTopicMa...		MadCap Software	
p.FooterTopic...	p	FooterTopicMa...		MadCap Software	
p.FooterTopic...	p	FooterTopicMa...		MadCap Software	
p.Index1	p	Index1		MadCap Software	
p.Index2	p	Index2		MadCap Softv	
p.Index3	p	Index3		MadCap S	



You can also work on a stylesheet in the Internal Text Editor.

Tasks Associated with Regular Stylesheets

Following are the primary tasks associated with regular stylesheets. For more information see the online Help or the Flare *Styles Guide*.

- **Create a New Stylesheet** The first step in using styles in your topics is to add a new stylesheet if necessary. However, if a stylesheet was already included in the template when you created the project, you can use that one instead of creating a new one.

  > **Note:** If you already have a stylesheet (CSS file) somewhere else and want to reuse it in your current project, you can import that stylesheet. You can also import individual styles from another stylesheet into one you've got in your project.

- **Create Style Classes** After you create or import a stylesheet, you can create new classes of a parent tag (or selector). Think of new style classes as children of the parent tags, which are already provided in the existing stylesheet. You cannot create new parent tags using the Flare user interface. For example, <p> (which stand for a "paragraph") is a parent tag, as are <h1>, <a>, and . You can create a class under any of those parent tags to give you more variety and flexibility when using styles in your content (e.g., p.Tip, p.Note, h1.IndexHeading). But you cannot use the Stylesheet Editor to create a new parent tag called, say, "MyTag" at the same level as the other parent tags; instead, it must be created as a style class under one of the existing parent tags.
- **Edit Styles** You can edit styles contained in a regular stylesheet to quickly change the look of your content. This is one of the tasks you will perform most often when it comes to stylesheets.
- **Apply a Stylesheet** To use the styles from a regular stylesheet, you must link the stylesheet to the appropriate file(s). You may want to apply a master stylesheet at the project or target level. The stylesheet then automatically becomes available for all topics in that project or target.

  You also have the option of applying a stylesheet to a single topic or to multiple topics at the same time.
- **Apply a Style to Topic Content** The final step is to apply styles to the content in your project. This is the other task you will perform most often when it comes to stylesheets.

More About Regular Stylesheets

See the online Help or the *Styles Guide* for more information about regular stylesheets, including the following.

- **MadCap-specific Styles and Properties** Learn about the many different styles and properties that were created just for use in MadCap products.
- **Types of Styles** Learn about the different kinds of styles that you can use in Flare.
- **Pseudo Classes** Learn about how to use pseudo classes in Flare, such as special settings for links in a certain state (e.g., link already clicked), as well as first-letter, before, and after effects.
- **Where's My Style?** Learn about reasons why your style not always be available for use when you are editing content.

Note: If you would like to access the same stylesheet that is used for the Flare documentation, you can download it from this location:

http://docs.madcapsoftware.com/FlareV10/styles.css

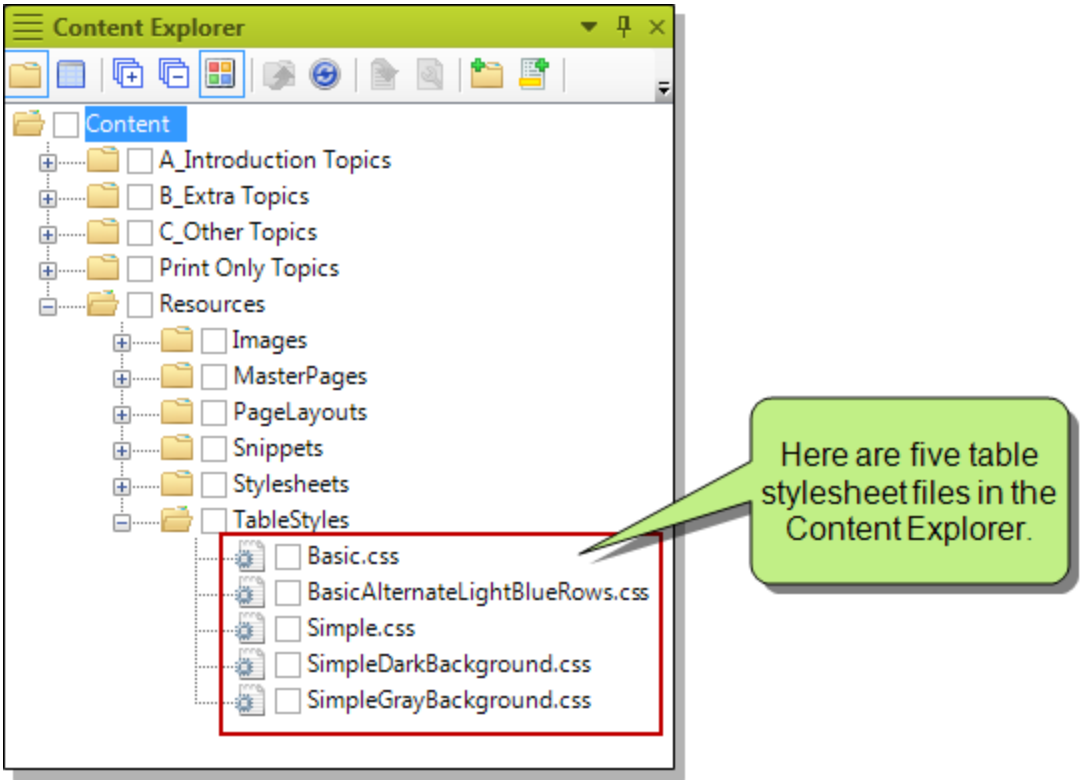
After downloading this file, you can save it to any location you want. For example, if you already have a project where you want to use it, you can navigate to the folder where that project is stored in Windows and save the stylesheet in the Content\Resources\Stylesheets subfolder.

Note: For the differences between regular stylesheets, table stylesheets, and local properties—and when you should use one over the other—see "Regular Stylesheets, Table Stylesheets, or Local Properties?" on page 240

About Table Stylesheets

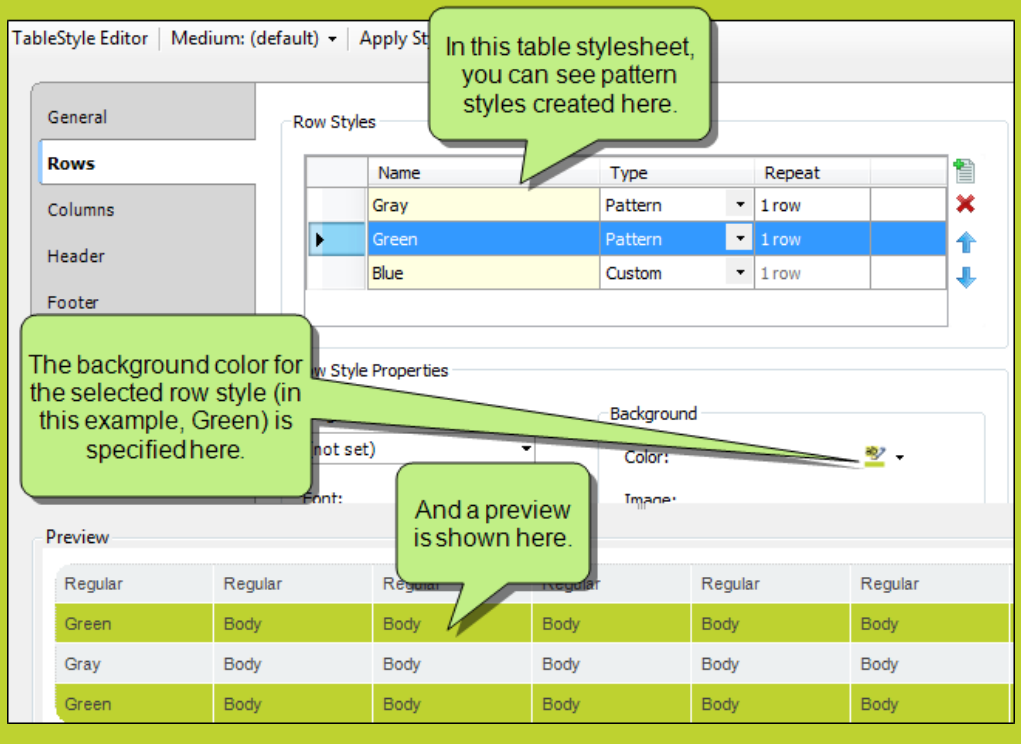
A table stylesheet lets you create a look that can be applied to several tables throughout your project. If you need to change the look of general content, you can use a regular stylesheet instead. In fact, a regular stylesheet is another way to control the look of tables. See "About Regular Stylesheets" on page 229.

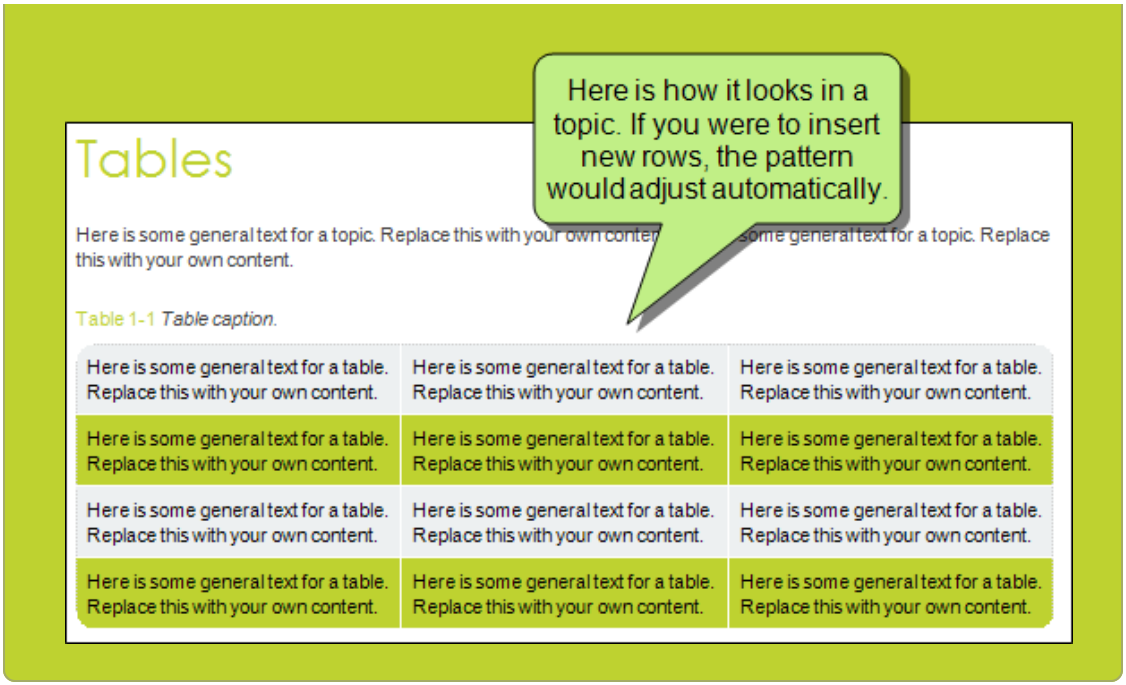
You can create as many table stylesheets as you need. The traditional location to store a table stylesheet in the Content Explorer is in the Resources\TableStyles folder. However, you can store it anywhere in the Content Explorer that you like.



EXAMPLE

You might use two different types of tables in your project—a basic one (with simple borders and no shading) and a patterned one (with customized borders and colored shading in certain rows and columns). So you create one table stylesheet (let's say it's called "Basic.css") and format it the way you want, and then you create a second table stylesheet (let's say it's called "RowPatternStyleSheet.css") and format it. Then, as you insert tables into your topics, you can associate the new table with one of these two table stylesheets.




Here is how it looks in a topic. If you were to insert new rows, the pattern would adjust automatically.
Tables
Here is some general text for a topic. Replace this with your own conten
some general text for a topic. Replace this with your own content.
Table 1-1 Table caption.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
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Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.
Here is some general text for a table. Replace this with your own content.

Table Style Editor

When you open a table stylesheet, it is displayed in the Table Style Editor, which contains multiple tabs and fields for specifying settings such as patterns, borders, backgrounds, alignment, and margins.

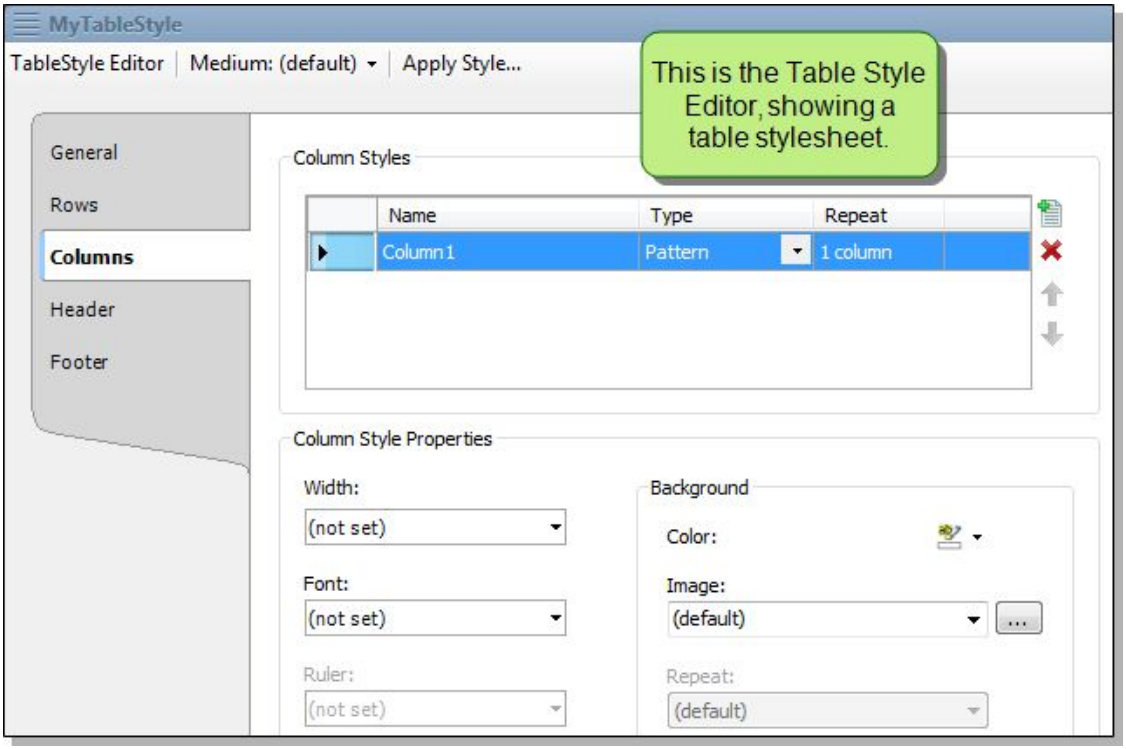


Table Styles and RTL Languages

If you are using a right-to-left (RTL) language, table styles in your project need to write additional CSS rules behind the scenes in order to work correctly with RTL tables. Because this can potentially double the size of the table style file, this behavior does not happen by default if you create and save a new table style. However, the behavior kicks in automatically in the following two scenarios. For more information see the Flare online Help.

- If you open a topic in the XML Editor and an RTL table references an old table stylesheet, Flare updates and saves the table stylesheet in your Content folder.
- If you generate output and an RTL table references an old table stylesheet, the table style in the output will be updated.

Steps for Using Table Stylesheets

Following are the primary tasks associated with table stylesheets.

1. **Create a New Table Stylesheet** You can add a stylesheet to be used specifically for tables. However, if a table stylesheet was already included in the template when you created the project, you can use that one instead of creating a new one. See "Setting Table Styles for Print Output" on page 318.
2. **Edit** After you create a new table stylesheet, you can edit it. For more information see the online Help or the Flare *Styles Guide*.
3. **Apply a Table Stylesheet to a Table** After you edit a table stylesheet, you can apply the stylesheet to a table. For more information see the online Help or the Flare *Styles Guide*.

Note: For the differences between regular stylesheets, table stylesheets, and local properties—and when you should use one over the other—see "Regular Stylesheets, Table Stylesheets, or Local Properties?" on the next page

Note: If you are importing Adobe FrameMaker documents and have tables that you have formatted in a certain way, you can create matching table styles as a result of the import. This can be specified on the Options page of the Import FrameMaker Wizard. In the Flare project, the new table styles will be named after the format named applied to the table in FrameMaker (e.g., "Format_A.css," "Format_B.css," and so on). You can rename these table stylesheets in Flare after the import. Even if you do not use this mapping feature, the table formatting still comes across when you import the files. The only difference is that table stylesheets make it easier to maintain the formatting of your tables within Flare.

Regular Stylesheets, Table Stylesheets, or Local Properties?

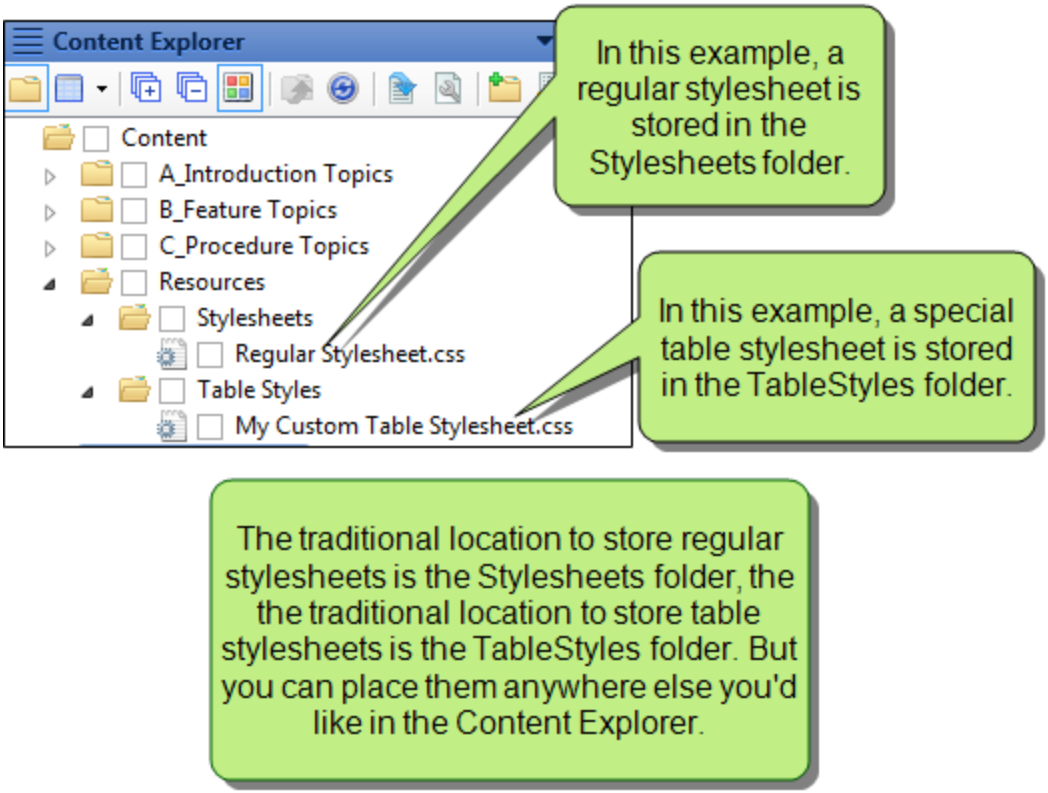
You can control the look of tables in the following ways.

- **Regular Stylesheet** This lets you store styles for general content in your project, including tables, to control how that content looks. See "About Regular Stylesheets" on page 229.
- **Table Stylesheet** This lets you control the look for tables only, creating customizable patterns. See "About Table Stylesheets" on page 235.
- **Table Properties Dialog** This lets you control the look for a specific table only, by setting options locally. For more information see the online Help or the Flare *Tables Guide*.
- **Other Local Formatting Tools** For virtually any kind of content you add to a topic or snippet, you can use a variety of local formatting tools to control the look. For example, you can highlight text in a table and use the Home ribbon to change the color. See "Local Formatting" on page 251.

Which Should I Use?

Using a stylesheet is always preferred over local formatting (i.e., controlling the look of content only at the place where it has been inserted). The good thing about stylesheets is that they let you separate the look of the content from the content itself. That way, you can manage the look from one place, which can save you a lot of time and effort. For example, you can change the padding in 84 tables by changing a setting in a single stylesheet, as opposed to opening each of those 84 tables and changing the padding in each one. Of course, there may be times when you need to make a change in the properties for a single table only, but for the most part, you should try to use stylesheets.

So why are there two kinds of stylesheets for tables? Why do you need to use a *table* stylesheet when you've already got a *regular* stylesheet? You actually do not need to. You can produce a look for tables entirely by using a regular stylesheet. But if you want to create tables that have different patterns (e.g., every other row might have a green background), it can be very difficult to do this in a regular stylesheet. So Flare lets you use these special table stylesheets to accomplish this task much more easily. You might even use both types of stylesheets to control different aspects of your tables.


Content Explorer
Content
A_Introduction Topics
B_Feature Topics
C_Procedure Topics
Resources
Stylesheets
Regular Stylesheet.css
Table Styles
My Custom Table Stylesheet.css
In this example, a regular stylesheet is stored in the Stylesheets folder.
In this example, a special table stylesheet is stored in the TableStyles folder.
The traditional location to store regular stylesheets is the Stylesheets folder, the the traditional location to store table stylesheets is the TableStyles folder. But you can place them anywhere else you'd like in the Content Explorer.

What About Conflicts/Order of Precedence?

Because you can often control the look of a table in multiple ways—(1) using local table properties, (2) using other local formatting tools, (3) a table stylesheet, or (4) a regular stylesheet—it's possible that you might encounter conflicting settings from time to time. When it comes to situations like this, the settings closest to the content typically has precedence. So any explicit setting in the Table Properties dialog (or other local formatting) has precedence over both stylesheet options, and the table stylesheet setting has precedence over the regular stylesheet setting. For example, let's say you open a regular stylesheet and specify that the outer borders of the table should be green. Then you open the table stylesheet and specify that the outer borders should be red. And then you open the Table Properties dialog and specify that the outer borders should be blue. You've told Flare to do three different things to the same table. So in this case, the table would display blue borders, because the local properties rule over the other settings. But if you remove that setting from the Table Properties dialog and use the default setting, the table would then display red borders, because the table stylesheet has precedence over the regular stylesheet. And finally, if you remove the settings from both the Table Properties dialog and table stylesheet, using the default setting in both, the table would take its command from the regular stylesheet and display green borders.

Stylesheet Mediums

This feature is supported in all outputs.

You can single-source styles through the use of stylesheet mediums and table print styles. A medium is an alternative set of styles in a stylesheet that you use for different outputs. They are intended to be an exception to the default style. Mediums can be used in both regular stylesheets and table stylesheets.

One use for a medium is to have one group of style settings for online formats (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and a different group of settings for print-based formats (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). Therefore, you could use one medium for your online targets and use another medium for PDF and your other print-based targets.

E X A M P L E

Let's say you have text hyperlinks that are shown in blue font with an underline. That may be fine for Target A, but let's say you want this style to appear in black font with no underline for Target B. The solution is to use a stylesheet medium.

Suppose Target A is using the "default" medium, where the blue underline properties are specified. With the properties for Target A already set, you now need to specify style properties for Target B. Therefore, in the Stylesheet Editor, instead of selecting the "default" medium, you can select another medium (e.g., the "print" medium) and change the properties for the style to black with no underline. It's the same stylesheet and the same style that you are working with. The only difference is that one medium is telling Flare to display that content in blue with an underline, and the other medium is telling it to use black font with no underline. With Target A using the default medium and Target B using the other medium, the content will display appropriately in each output.

Stylesheet Mediums Provided

Flare provides you with the following stylesheet mediums. These are enough to satisfy the needs of most authors, but you can create additional mediums if necessary.

- **default** This is the standard medium. Any settings that you specify in the default medium "trickle down" automatically to the other mediums. However, you can override any setting in a specific medium.

  EXAMPLE

  Suppose you are using four different mediums (default, print, non-print, CustomA) in your project. Let's say you specify that the font color for the <p> style tag in the default medium should be red. If you were to then open any of the other three mediums, you would see that the font color for the <p> tag in each of those is also red. If you were to open the print medium and change the font color for the <p> tag to blue, that is the color that will be used for that medium. However, the <p> tag will continue to be displayed in red for the default, non-print, and CustomA mediums.

- **print** This medium is designed to be used for print-based output types (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). When you create a print-based target, this medium is automatically associated with it (although you can select a different medium for the target if necessary).
- **non-print** If you are creating online output and do not want to use the default medium for it, you can use this medium instead. For example, you might want to use the default medium for three online targets that you are working on, but you want to create a fourth online target that uses a different set of styles. In that case, you can use the non-print medium for that fourth target (or you can create custom mediums if necessary).

The Print Medium and Page Layouts

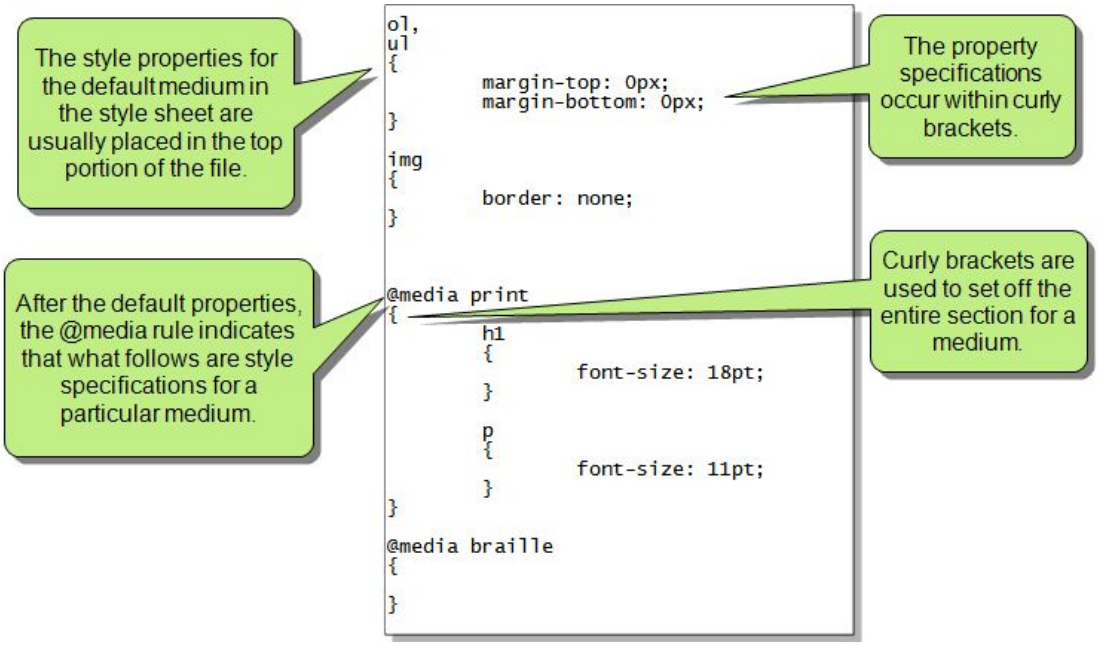
Page layouts render content using the Print medium settings in the stylesheet. See "Page Layouts" on page 336.

E X A M P L E

Let's say you have a style called "p.Section" and you apply this style to the text you have in a header frame in a page layout. In the Default style medium, the font color for this style is black, but in the Print medium it is red. It makes more sense to display the font for a page layout based on the Print medium, because that medium will most likely be used in the print-based output. Therefore, the text displays as red in the page layout.

Medium Organization and Printing

Different mediums in a CSS are set apart by the @media rule and sets of curly braces. This can be seen when you open the stylesheet source file; to do this, navigate to the CSS file in the Content Explorer, right-click on it, and select **Open with>Notepad**.



The placement of the medium section in the stylesheet affect which styles are used when you print topics. For example, if you are using the print medium and want those styles to be used when printing a topic from a web browser, the @media print section should be placed in the stylesheet after your default media section, because style properties lower in a CSS take precedence over properties placed above them. You can always move the medium sections around in the stylesheet (if you want them to be placed higher or lower in the file) by cutting and pasting them in Notepad.

For more information about mediums in a CSS, see **http://www.w3.org/TR/CSS2/media.html**.

Tasks Associated With Stylesheet Mediums

Following are the tasks that you might perform when working with stylesheet mediums.

- **Select in Editor** When you are modifying the properties of a style in the Stylesheet Editor or when you are working in the Table Style Editor, you need to let Flare know which medium your settings should be applied to. To do this, select the medium from the **Medium** drop-down list in the editor, then set the style properties as necessary. See "Selecting Stylesheet Mediums" on the following page.
- **Select in XML Editor** Flare lets you use two different layout modes when working in the XML Editor: Web Layout mode and Print Layout mode. The "default" and "print" mediums are tied to these two layout modes. This simply means that when you are working in Web Layout mode, the XML Editor displays the styles specified in the default medium. But if you switch to Print Layout mode, the XML Editor automatically displays the styles specified in the print medium. This is simply a way to let you see your content in the format that you are most likely concerned about at the moment. Of course, you can always select a specific medium in the XML Editor when using either layout mode. See "Selecting Stylesheet Mediums" on the following page and "About Layout Modes" on page 22.
- **Create** You may very well be able to meet all of your style editing needs by simply using the mediums provided by Flare (default, print, non-print). However, if necessary, you can add as many new custom mediums as you need. See "Creating Stylesheet Mediums" on page 250.
- **Associate With Targets** After you decide on a medium to use for output, you need to associate it with the target. After you build the target, the medium will be used to display the correct style settings in the output. See "Associating a Medium with a Target" on page 250.

Selecting Stylesheet Mediums

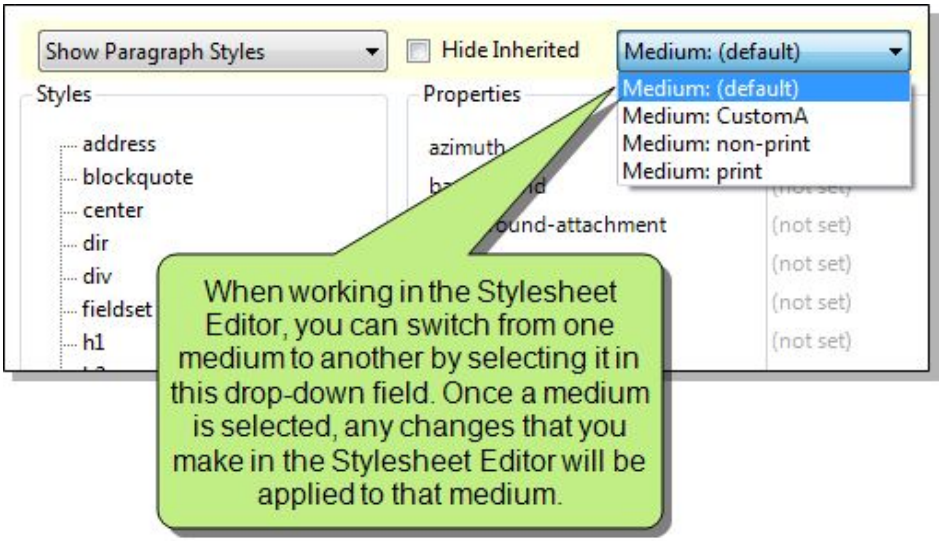
There are multiple places and purposes when it comes to selecting a stylesheet medium.

When Editing Styles

First, you can select a medium in the Stylesheet Editor when editing topic styles, or you can select a medium in the Table Style Editor when working with table styles. You need to do this in order to let Flare know which medium your style settings should be applied to.

HOW TO SELECT A MEDIUM IN THE STYLESHEET EDITOR

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. Click in the **Medium** drop-down list and select the appropriate medium.

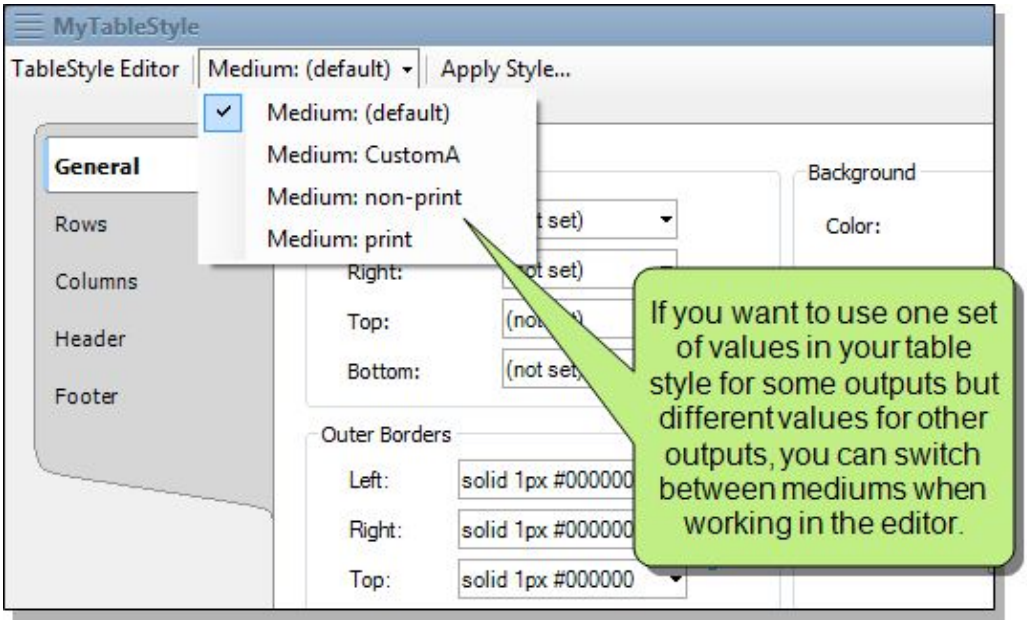


3. Edit the styles for that medium as necessary.

   For more information see the online Help or the Flare *Styles Guide*.

HOW TO SELECT A MEDIUM IN THE TABLE STYLE EDITOR

1. Open the table stylesheet.
2. Click in the **Medium** drop-down list and select the appropriate medium.



3. Edit the table style properties for that medium as necessary.

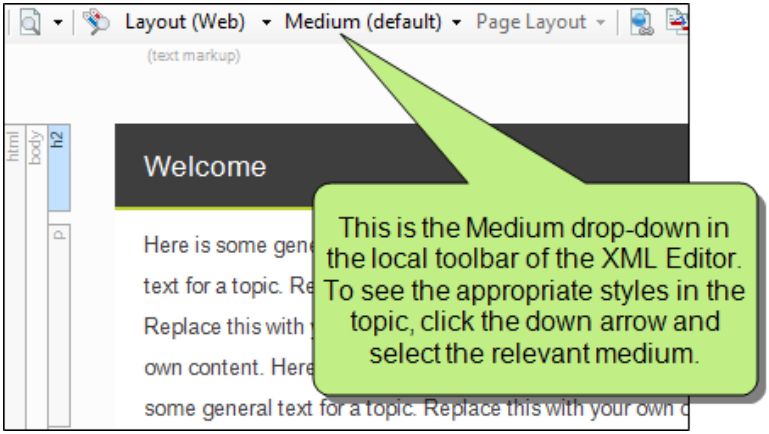
   For more information see the online Help or the Flare *Styles Guide*.

When Viewing or Editing Content

Second, you can select a medium in the XML Editor when viewing and editing content. Flare lets you use two different layout modes when working in the XML Editor: Web Layout mode and Print Layout mode. The "default" and "print" mediums are tied to these two layout modes. This simply means that when you are working in Web Layout mode, the XML Editor displays the styles specified in the default medium. But if you switch to Print Layout mode, the XML Editor automatically displays the styles specified in the print medium. This is simply a way to let you see your content in the format that you are most likely concerned about at the moment. Of course, you can always select a specific medium in the XML Editor when using either layout mode.

HOW TO SELECT A MEDIUM IN THE XML EDITOR

1. Open the content file (e.g., topic, snippet).
2. In the local toolbar, click in the **Medium** drop-down list and select the appropriate medium.



The look of the content changes to reflect the style settings for that medium.

This feature is simply intended to show you how particular styles make a topic look. By using this feature, you are not telling Flare to use that medium for the output for that topic. The way to do that is to associate the medium with a target.

Creating Stylesheet Mediums

A few mediums are already provided in your stylesheet (i.e., default, print, non-print), but you can add as many new ones as you need.

HOW TO CREATE A STYLESHEET MEDIUM

1. Open a stylesheet.
2. In the local toolbar of the Stylesheet Editor, click Options and select **Add Medium**.
3. In the Rename Medium dialog, type a new name for the medium (without spaces).
4. Click **OK**.
5. Click to save your work.

Associating a Medium with a Target

After you decide on a medium for an output, you need to associate it with the target. After you build the target, the medium will be used to display the correct style settings in the output.

HOW TO ASSOCIATE A MEDIUM WITH A TARGET

1. Open the target.
2. In the Target Editor, click the **Advanced** tab.
3. Click the drop-down arrow in the **Medium** field, and select the stylesheet medium that you want to associate with the target.
4. Click to save your work.

Note: When you create a print-based target (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML), the "print" medium is automatically associated with that target (on the Advanced tab of the Target Editor). Of course, you can always select a different medium if you want.

Local Formatting

When you edit the content of a topic, you are working in the XML Editor. Local formatting is a way to change the look and feel of content directly so that the changes are applied only to that specific content (as opposed to applying the changes throughout your project via the use of styles). Many easy-to-use tools are provided for editing and formatting topics locally in the XML Editor to give them the look and feel you want, without having to know XML at all. Simply open the topic that you want to format, and use the tool that suits your needs best.

Local formatting (sometimes called "inline" formatting) can be very attractive because it is quick and easy. However, it is recommended that you use styles instead of local formatting whenever possible. Although local formatting is very convenient in the short-term, using styles is much more efficient and can save you a great deal of time in the long-term.

Local formatting tools are available in the following areas.

- Local Toolbar of XML Editor
- Home Ribbon
- Formatting Window Pane
- Font Properties Dialog
- Paragraph Properties Dialog

For descriptions of the tools in each of these, refer to the online Help.

Autonumbers

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

Autonumbering is just what it sounds like—a feature where content is numbered automatically. Of course, if you want to create simple numbered lists in topics, you can always use Flare's quick list drop-down options. But if you want an alternative that is more advanced and powerful, you can use autonumbering.

Why Use Autonumbers?

Autonumbering can technically be used for both online and print-based output, but it is really intended for print-based output.

Following are just a few reasons for using autonumbering. For samples of formats that you might use for these purposes, see "Autonumber Format Examples" on page 265.

» **Chapter, Section, and Volume Numbers** If you are producing output that is organized into multiple chapters, sections, and/or volumes, you can apply autonumbers to those different elements. Not only does this let you produce numbers automatically for chapter, section, and volume headings, but you can also incorporate this numbering into other content (e.g., page numbers, figure captions, table headings).

Note: To generate *chapter* numbers, you need to create an autonumber format that includes the {chapnum} command. Then specify chapter breaks in the outline TOC. See "Specifying Chapter and Page Layout Breaks" on page 542.

Note: To generate *section* numbers, you need to create an autonumber format that includes the {secnum} command. Then specify section breaks in the outline TOC. See "Specifying Chapter and Page Layout Breaks" on page 542.

Note: To generate *volume* numbers, you need to create an autonumber format that includes the {volnum} command. Second, you need to specify chapter breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542). Third, you need to specify the autonumber flow for

each volume, resetting the volume number to a specific number (see "Autonumbering Flow for Output" on page 556).

Note: You can also insert Chapter, Section, or Volume Number variables into page layout headers. By doing this, you can automatically display the correct chapter, section, or volume number at the top or bottom of pages in the output. See "Chap/Sec/Vol Variables in Frames" on page 430.

Note: If you are using chapter or volume autonumbers and you want these numbers to be reflected in a print index, you can do so by specifying the autonumbers at the appropriate locations in your outline TOC (instead of inserting Chapter or Volume Number variables in a page layout). See "Page Autonumbers in Print Indexes" on page 149.

Note: In order to create chapter and volume autonumbers in FrameMaker output, you must split the output into multiple FrameMaker documents. If you are creating one of the other print-based outputs (PDF, XPS, XHTML, Word), you do not necessarily need to create multiple documents, but you do need to create chapter breaks for the output. For more information see the online Help.

- **Paragraphs** You can apply autonumbering to different levels of paragraphs in your project.

EXAMPLE

You might specify that the first-level paragraphs contain number formats such as 1.0, 2.0, 3.0, and so on. Maybe your second level paragraphs would be formatted as 1.1, 1.2, 1.3, 2.1, 2.2, and so on. And finally, the third level paragraphs might be formatted as 1.1.1, 1.1.2, 1.2.1, 1.2.2, 1.2.3, and so on.

- **Figure Captions** Perhaps you have inserted multiple images into your project, with a caption under each image. If you want the captions for each chapter to be numbered (e.g., "Figure 1-1," "Figure 1-2," "Figure 1-3," "Figure 2-1," "Figure 2-2"), you can apply autonumber formats to that content. If you insert a new figure caption with that format between existing captions, Flare will renumber them automatically.
- **Table Headings** Another way to make use of autonumbering is to apply them to headings for tables in your project (e.g., Table 1, Table 2, Table 3).

- **Page Numbering** You can easily include page numbers in content for print-based output without creating autonumber formats. However, if you want to incorporate volume, chapter, or section numbers into your pages numbers, you can so by using autonumber formats.
- **Lists** As an alternative to using Flare's quick list drop-down options, you can use autonumbering to create numbered lists for purposes such as step-by-step procedures or outlines.
- **And More…** If you can apply a paragraph style to it, you can include autonumbering in it.

Steps for Using Autonumbers

Whatever you are trying to accomplish when it comes to autonumbers, there are three basic tasks that you may complete.

1. **Create Autonumber Formats** First, you need to specify what a particular autonumber will include and what it will look like.

   EXAMPLE

   If you are creating a format to use with figure captions, you might specify the format to display the word "Figure" followed by the chapter number, a dash, and an incremented number. You also might want this format to appear in bold font. Finally, you might use a float option so that the autonumber is positioned to the left of the page layout frame where the relevant paragraph occurs.

   You can create autonumber formats for styles (which you can easily reuse) or directly for a specific paragraph. For more information about creating these formats for styles, see "Autonumbers for Styles" on page 257. For more information about creating these formats for paragraphs, see the online Help.

2. **Apply Styles with Autonumber Formats to Content** After the autonumber format is created using the style method, you need to indicate where it should be displayed in your content.

   EXAMPLE

   If you plan to use an autonumber format for figure captions, you apply the style using that particular format to the appropriate locations in your topics.

   For more information about using styles, including steps, see the online Help or the Flare *Styles Guide*.

3. **Specify Autonumbering Flow for Output** If you are including volume, chapter, and/or section autonumbers in print-based output, you need to indicate where each volume, chapter, or section should begin and end. You also need to provide other specifications, such as whether the numbering should restart at a specific number, whether it should continue from the previous list, and the type of numbering format (e.g., Roman, alpha) to be used.

This procedure is especially useful if you have created chapter autonumbers and need to ensure that they begin with the correct number at the correct location, after any front matter (e.g., title page, copyright page, generated table of contents).

For more information see "Autonumbering Flow for Output" on page 556.

When you import FrameMaker files, the autonumbers in those documents are retained in Flare. You can then edit future content for your project (including autonumbers) either in Flare or in FrameMaker.

Autonumbers for Styles

When you incorporate autonumbering into content, you do so by creating an autonumbering format, which consists of one or more commands. Some examples of commands are: CH:, {n+}, {chapnum}, {b}, and {/b}. In addition, you can add text next to commands.

E X A M P L E

Let's say you want to apply autonumbering to figure captions. Furthermore, let's say you want the beginning of each caption to contain the word "Figure" followed by the chapter number, a dash, and the next incremented number (e.g., Figure 1-5, Figure 1-6, Figure 1-7). To accomplish this, you might create an autonumbering format that looks like this: CH:Figure {chapnum}-{n+}.

For several samples, see "Autonumber Format Examples" on page 265.

The following steps show you how to create an autonumber format for a style class. This is the recommended method. A style allows you to apply the same format to multiple paragraphs throughout your project, and any changes to the format are applied automatically to all the paragraphs using that style. Alternatively, you can create an autonumber format for a single paragraph. For steps see the online Help.

HOW TO CREATE AN AUTONUMBER FORMAT FOR A STYLE USING THE ADVANCED VIEW

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. On the left side of the Stylesheet Editor, select the style. Usually, it is a paragraph or heading style (e.g., h1, p.Figure). If you do not yet have a style that you want to use, you can create one.
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **AutoNumber** group.
7. Click in the right column (the value column) next to **mc-autonumber-format**. The Autonumber Format dialog opens.

8. (Optional) From the **Available commands** drop-down list, you can filter the autonumber commands shown in the area below by selecting one of the options.
   - **Show All** Displays all of the commands in the area below.
   - **Show AutoNumber Commands** Displays only the autonumber commands in the area below. These include commands such as chapter, section, and volume numbers; counters; and series labels.
     - **Chapter, Section, and Volume Number Commands** These commands ({chapnum}, {secnum}, {volnum}) let you organize your output into different areas and apply number sequences to them (e.g., Chapter 1, Chapter 2, Chapter 3).
     - **Counters are Commands** These commands (such as {n}, {n=1}, {n+}, {r}, {A}, and {Gn}) provide information about what types of numbers should be used and how they should be incremented.
     - **Series Labels** These are prefixes to a format (composed of one or two letters and a colon) that provide a way to limit numbering sequences for different purposes. Although Flare includes H: in the list of available commands, that is simply one example of a series label. The letter that you use as a series label is arbitrary. You can replace H and choose any letter of the alphabet, followed by a colon. The exception to this is a two-letter series label, in which the first letter represents a series that encompasses more than just one topic. For example, CH is an example of a series label that applies across an entire chapter. The H can be replaced with another letter, but you must keep the C in order to use this command. Finally, it's important to note that a series label must always be the first element in an autonumber format.
   - **Show File Commands** Displays only the file commands in the area below. These include commands that let you incorporate different parts of a file (such as the file name, file path, and file extension) in an autonumber format.
   - **Show Format Commands** Displays only the format commands in the area below. These include commands such as {b}, {i}, {color red}, and {size 12pt}, which let you determine how an autonumber format will look. Many of these commands require a beginning command (e.g., {b}) and an ending command (e.g., {/b}). However, if you plan to generate FrameMaker output from your project, you should not use these format commands, since they are not supported in FrameMaker. Instead, create and apply a span class to the autonumber format to change its look. To create a span class, open the Stylesheet Editor, select the **span** tag on the left side of the editor, and follow the steps for creating a style (e.g., span.BoldGreen).
   - **Show Page Commands** Displays only the page commands in the area below. These let you include the page number and count in an autonumber format.
   - **Show Text Commands** Displays only the text commands in the area below. These commands let you incorporate text from an area of your output into the autonumber format.
9. In the **Enter format** field, provide the autonumber format for the style. This format can be a combination of text that you type and automated commands that you select. To add a command to the "Enter format" field, double-click it from the list in the area below.

E X A M P L E S

If you want the autonumber to include text (such as "Table" or "Figure"), simply type it in this field. You can also double-click any of the commands below to add them to this field. For example, you might want to add a counter that increments the autonumbers by one (e.g., Figure 1, Figure 2, Figure 3). The command for this is {n+}. Descriptions for each command are displayed in the list.

Some commands include a start tag and an end tag. For example, if you want a portion of the autonumber format be displayed in bold, you would place your cursor in the "Enter format" field where you want to start the bold font and double-click **b** in the list below. Then place your cursor where you want the bold font to end and double-click **/b** from the list.

So in the end, your autonumber format might include a combination of text and multiple commands, such as: {b}Table {n+} - {/b}.

Following are descriptions of the commands that are available.

AUTONUMBER COMMANDS

- **{n}** Retains the current counter value and displays it. You might use this command, for example, if you are applying autonumber formats to multi-level paragraphs, where one paragraph acts as the "parent" to another. Let's say the first-level paragraphs are numbered like this: 1.0, 2.0, 3.0. If you want the second level paragraphs to keep the first number of its parent paragraph and increment the second number (e.g., 1.1, 1.2, 1.3), you would enter the {n} command to continue displaying that first number, which represents the parent paragraph (in this case, 1).
- **{n=1}** Resets the counter value to 1 and displays 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 display it. You can replace the number 0 with any other number that you want to use.
- **{n+}** Increments the counter value and displays it. You might use this command, for example, to increment a list of step-by-step procedures (e.g., 1., 2., 3.).
- **{}** Retains the current value and does not display it. You might use this command, for example, if you are creating an outline with Roman numerals at the first level and uppercase alpha numerals at the second level. If you are creating the format for the second level, you want the autonumber format to keep track of the fact that it is a "child" of the first level paragraph, but you do not want to display the Roman numeral from it (e.g., IV.A.). Instead, you only want to display the uppercase alpha letter (e.g., A). In order to do this, you would insert the { } command at the place where the Roman numeral would normally be displayed.

» **{secnum}** Displays the current section number. You can use this command if you are creating online output, or Word, XPS, PDF, or XHTML output. This command does not apply to FrameMaker output.

> **Note:** To generate *section* numbers, you need to create an autonumber format that includes the {secnum} command. Then you need to specify section breaks in the outline TOC. See "Specifying Chapter and Page Layout Breaks" on page 542.

> **Note:** You can also insert Section Number variables into page layout headers. By doing this, you can automatically display the correct section number at the top or bottom of pages in the output. See "Chap/Sec/Vol Variables in Frames" on page 430.

» **{chapnum}** Displays the current chapter number.

> **Note:** To generate *chapter* numbers, you need to create an autonumber format that includes the {chapnum} command. Then you need to specify chapter breaks in the outline TOC. See "Specifying Chapter and Page Layout Breaks" on page 542.

> **Note:** You can also insert Chapter Number variables into page layout headers. By doing this, you can automatically display the correct chapter number at the top or bottom of pages in the output. See "Chap/Sec/Vol Variables in Frames" on page 430.

» **{volnum}** Displays the current volume number.

> **Note:** To generate **volume** numbers, you need to create an autonumber format that includes the {volnum} command. Second, you need to specify chapter breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542). Third, you need to specify the autonumber flow for each volume, resetting the volume number to a specific number (see "Autonumbering Flow for Output" on page 556).

Note: You can also insert Volume Number variables into page layout headers. By doing this, you can automatically display the correct volume number at the top or bottom of pages in the output. See "Chap/Sec/Vol Variables in Frames" on page 430.

- **{r}** This is the same as the {n} command, except it displays the counter as a lowercase Roman numeral. You can replace the "n" with an "r" in any of the commands listed above.
- **{R}** This is the same as the {n} command, except it displays the counter as an uppercase Roman numeral. You can replace the "n" with an "R" in any of the commands listed above.
- **{a}** This is the same as the {n} command, except it displays the counter as a lowercase alpha letter. You can replace the "n" with an "a" in any of the commands listed above.
- **{A}** This is the same as the {n} command, except it displays the counter as an uppercase alpha letter. You can replace the "n" with an "A" in any of the commands listed above.
- **{Sn}** This is a counter to be used over the course of an entire section. This specific command retains the current counter value and displays it. However, you can modify it to create custom versions of any of the commands that you see above with {n}. For example, you might want to use {Sn+} or {Sn=1}.
- **{Cn}** This is a counter to be used over the course of an entire chapter. This specific command retains the current counter value and displays it. However, you can modify it to create custom versions of any of the commands that you see above with {n}. For example, you might want to use {Cn+} or {Cn=1}.
- **{Gn}** This is a counter to be used globally in your content. This specific command retains the current counter value and displays it. However, you can modify it to create custom versions of any of the commands that you see above with {n}. For example, you might want to use {Gn+} or {Gn=1}.
- **H:** Specifies a 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. For example, you might want to use F: for a series of figure captions, or T: for a series of table captions. If you use a series label, it must be first in the autonumber format.
- **SH:** Specifies a section-wide series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H). For example, you might want to use SF: for a section-wide series of figure captions, or ST: for a section-wide series of table captions. If you use a series label, it must be first in the autonumber format.
- **CH:** Specifies a chapter-wide series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H). For example, you might want to use CF: for a chapter-wide series of figure captions, or CT: for a chapter-wide series of table captions. If you use a series label, it must be first in the autonumber format.

- **GH:** Specifies a global series labeled H. However, you can use any letter of the alphabet as the second letter (replacing H). For example, you might want to use GF: for a global series of figure captions, or GT: for a global series of table captions. If you use a series label, it must be first in the autonumber format.

FILE COMMANDS

- **{ext}** Displays the file extension.
- **{file}** Displays the file name, including the extension.
- **{filename}** Displays the file name, without the extension.
- **{path}** Displays the path of the file.
- **{url}** Displays 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 font family.
- **{/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}** Displays the page number.
- **{pagecount}** Displays the page count.

TEXT COMMANDS

- **{title}** Displays the title of the document (from the Properties dialog).

10. Click **OK**. The dialog closes.
11. You can enter settings for the other autonumber format properties in the Stylesheet Editor.
    - **mc-autonumber-class** You can enter a span style class for the autonumber format. Use this field instead of format commands (such as {b} and {i}) if you are planning to create FrameMaker output. You can create and modify span classes in the Stylesheet Editor. To create a span class, open the Stylesheet Editor, select the **span** tag on the left side of the editor, and follow the steps for creating a style (e.g., span.BoldGreen).
    - **mc-autonumber-offset** You can specify the amount of space that you want to create between a format's content and the paragraph content. Select **Length** in the top drop-down list. You can then enter an amount and choose from several different units of measurement (points, pixels, centimeters, etc.). Click **OK** when you are done.
    - **mc-autonumber-position** You can select the position for the autonumber format in the paragraph.
        - **float-left** The autonumber format is placed to the left of the paragraph content, in alignment with the left side of the page frame.
        - **float-right** The autonumber format is placed to the right of the paragraph content, in alignment with the right side of the page frame.
        - **inside-head** The autonumber format is placed before the paragraph content, inside the content area. Text that is wrapped to the next line will align under the autonumber format.
        - **inside-tail** The autonumber format is placed after the paragraph content, inside the content area. Text that is wrapped to the next line will align under the autonumber format.
        - **none** The autonumber functionality (autonumbers, counters, and formatting) are removed from the class, while the other class properties are preserved.
        - **outside-frame** The autonumber format is placed outside the page layout frame holding the paragraph.
        - **outside-head** The autonumber format is placed before the paragraph content, but outside of the content area. Therefore, text that is wrapped to the next line will align under the previous text (not under the autonumber format). You can provide space between the format and the content by using the "mc-autonumber-offset" property.

» **outside-tail** The autonumber format is placed after the paragraph content, but outside of the content area. Therefore, text that is wrapped to the next line will align under the previous text (not under the autonumber format). You can provide space between the format and the content by using the "mc-autonumber-offset" property.

12. Click to save your work.

Autonumber Format Examples

Following are examples of some common uses of autonumbering and how you might create autonumber formats for them. For examples of autonumbers in action, you can create a test project using one of Flare's factory templates.

Autonumber Format	How It Will Look in Output	Where You Might Use It
GH:VOLUME {volnum}:	VOLUME 1: [My Volume Title]	A heading to display the volume number and title. **Note:** To generate **volume** numbers, you need to create an autonumber format that includes the {volnum} command. Second, you need to specify chapter breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542). Third, you need to specify the autonumber flow for each volume, resetting the volume number to a specific number (see "Autonumbering Flow for Output" on page 556).
CH:Chapter {chapnum} -	Chapter 1 - [My Chapter Title]	A heading to display the chapter number and title. **Note:** To generate **chapter** numbers, you need to create an autonumber format that includes the {chapnum} command. Then you need to specify chapter breaks in the outline TOC. See "Specifying Chapter and Page Layout Breaks" on page 542.

Autonumber Format	How It Will Look in Output	Where You Might Use It
CH:{chapnum}.{n+}	1.1 [My Subheading]	A subheading within a chapter, where the first number reflects the chapter number. The second number is simply incremented. Additional subheadings using this same format would be numbered like this: 1.2 1.3 1.4
A:{n+}.0	1.0 [My Paragraph Text]	A paragraph at the first level of your content, where you are not concerned about using the chapter number. You simply want to begin counting at 1. The second number is simply 0 for each paragraph using the style. Additional paragraphs using this same format would be numbered like this: 2.0 3.0 4.0 In this example, "A" at the beginning of the format is arbitrary. You can use any letter you want.

Autonumber Format	How It Will Look in Output	Where You Might Use It
A:{n}.{n+}	1.1 [My Paragraph Text]	A paragraph at the second level of your content, where you are not concerned about using the chapter number. You might indent paragraphs (or styles) using this format. If so, paragraphs using this same format would be seen as "children" of first-level paragraphs and numbered like this: 1.0 1.1 1.2 2.0 2.1 2.2 2.3 In this example, "A" at the beginning of the format is arbitrary. You can use any letter you want.

Autonumber Format	How It Will Look in Output	Where You Might Use It
A:{n}.{n}.{n+}	1.1.1 [My Paragraph Text]	A paragraph at the third level of your content, where you are not concerned about using the chapter number. You might indent paragraphs (or styles) using this format. If so, paragraphs using this same format would be seen as "children" of first-level and second-level paragraphs and numbered like this: 1.0 1.1 1.1.1 1.1.2 2.0 2.1 2.1.1 2.1.2 2.1.3 In this example, "A" at the beginning of the format is arbitrary. You can use any letter you want.
O:{R+}.	I. [My Paragraph Text]	A paragraph at the first level of an outline. Additional paragraphs using this same format would be numbered like this: II. III. IV. In this example, "O" at the beginning of the format is arbitrary. You can use any letter you want.

Autonumber Format	How It Will Look in Output	Where You Might Use It
O:{ }{A+}.	A. [My Paragraph Text]	A paragraph at the second level of an outline. You might indent paragraphs (or styles) using this format. If so, paragraphs using this same format would be seen as "children" of first-level paragraphs and numbered like this: I. A. B. II. A. B. C. In this example, "O" at the beginning of the format is arbitrary. You can use any letter you want.

Autonumber Format	How It Will Look in Output	Where You Might Use It
CF: FIGURE {chapnum}-{n+}:	FIGURE 1-1: [My Figure Caption Text]	A paragraph below an image to describe the contents of the image. In this example, the first number refers to the chapter number where the image is included, and the second number simply increments by 1 each time the autonumber format is applied to content. So the first few figure captions of Chapter 1 would be numbered like this: FIGURE 1-1: FIGURE 1-2: FIGURE 1-3: And the first few figure captions of Chapter 2 would be numbered like this: FIGURE 2-1: FIGURE 2-2: FIGURE 2-3: In this example, the "C" at the beginning of the format is necessary to increment based on the chapter. The "F" that comes after it is arbitrary. You can use any letter you want (e.g., CP).
T:Table {n+} -	Table 1 - [My Table Caption Text]	A paragraph above a table to display the caption for the table, where you are not concerned about using the chapter number. The autonumbers would increment like this: Table 1 - Table 2 - Table 3 - In this example, "T" at the beginning of the format is arbitrary. You can use any letter you want.

Autonumber Format	How It Will Look in Output	Where You Might Use It
{n+}.	1. [My Paragraph Text]	A paragraph that is part of step-by-step procedures, which would look like this: 1. 2. 3.
{R+}.	I. [My Paragraph Text]	A paragraph that is the first level of an outline. In this example, we've used uppercase Roman numerals for the first level, so it would look like this: I. II. III.

Object Positioning

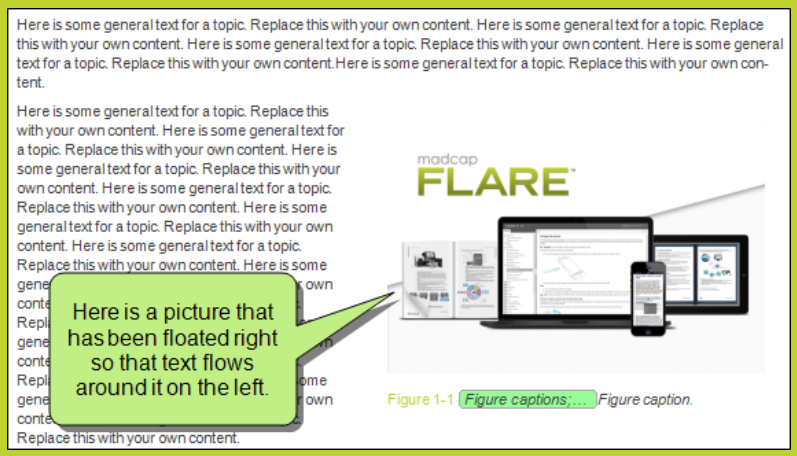
This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

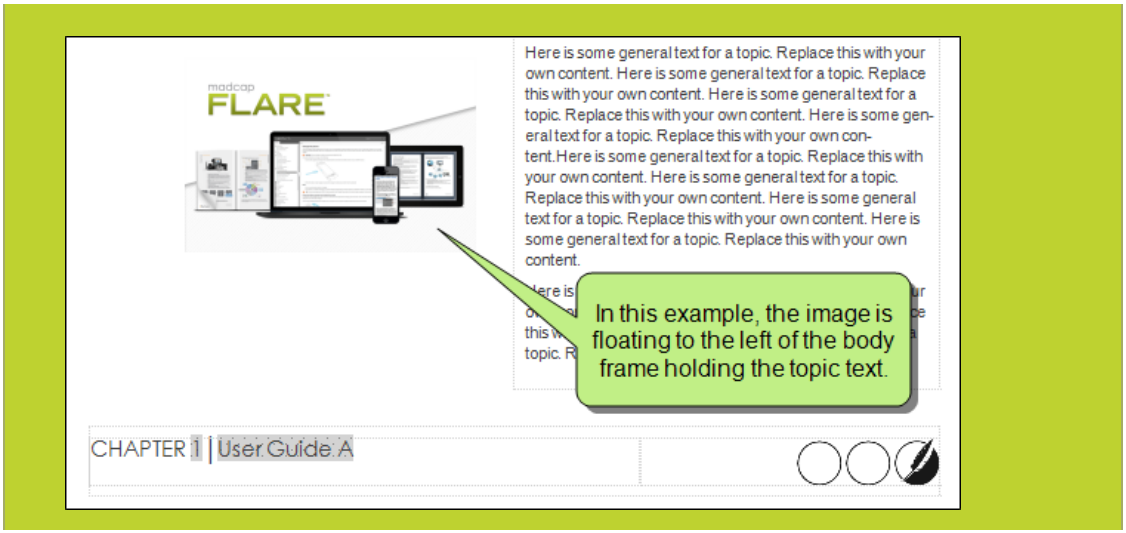
After you insert an object (such as an image or text box) into a topic, you can adjust its positioning on the page. This can be done through styles or by using local formatting.

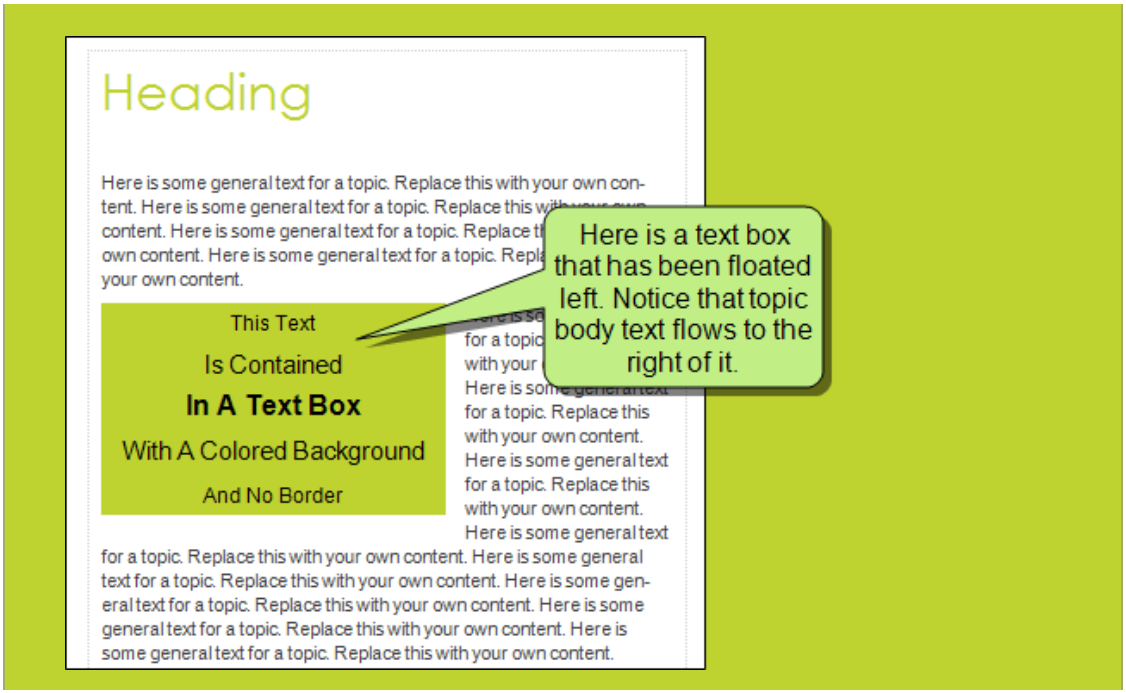
Floating Objects

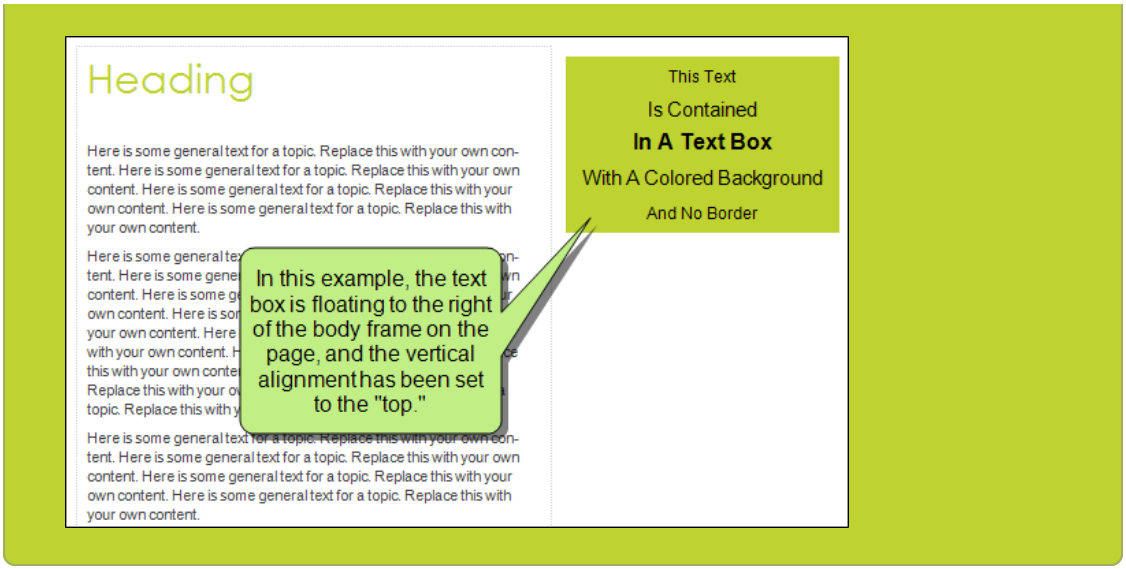
One way to position an object is to "float" it to the left or right on a page. When you float an object to the left, wraparound text can flow on the right side of the object. When you float an object to the right, wraparound text can flow on the left side of the object. You can also float objects outside of the frames where the normal text flow occurs.

E X A M P L E S




madcap
FLARE
Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.
In this example, the image is floating to the left of the body frame holding the topic text.
CHAPTER 1 | User Guide A


Heading
Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.
This Text
Is Contained
In A Text Box
With A Colored Background
And No Border
Here is a text box that has been floated left. Notice that topic body text flows to the right of it.
for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.


Heading
Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.
This Text
Is Contained
In A Text Box
With A Colored Background
And No Border
In this example, the text box is floating to the right of the body frame on the page, and the vertical alignment has been set to the "top."

Enabling Object Positioning

You can turn object positioning on and off. If it is on, you can easily position the object (e.g., image, text box) in different places in the topic (e.g., to the right or left of the frame on a page). If it is off, the exact placement will not be seen in the editor, although it will be seen in the output.

HOW TO ENABLE OBJECT POSITIONING

1. Open the content file (e.g., topic, snippet).
2. In the local toolbar of the XML Editor, click the down arrow of the **Show tags** button . Then select **Enable Object Positioning** to add the check mark next to it. (If you select this option and the check mark is removed, object positioning is disabled.)

Positioning Objects

After you insert an object such as an image, text box, or QR code, you can adjust its positioning on the page. This includes the ability to wrap text around an image or float an image outside the frame holding the regular flow of text.

HOW TO POSITION AN OBJECT ON A PAGE

1. Open the content file (e.g., topic, snippet).
2. Right-click on the object, and from the menu, select the option to edit the object's properties (e.g., for text boxes, you would select **Text Box**.; for images, you would select **Edit Image**; for QR codes you would select **Edit QR Code**). The appropriate Properties dialog opens.
3. Select the **Size & Position** or **Position** tab.
4. In the **Position** section, you can select a **Float** and a **Clear** setting. You can also set the **Vertical Alignment** of the object.

   FLOAT

   Use this field to specify where to place the object on the page.

   - **None** Does not place the object in a specific location.
   - **Left** Positions the object on the left side of the page frame, allowing you to type text to the right of the object.
   - **Right** Positions the object on the right side of the page frame, allowing you to type text to the left of the object.
   - **Center of Column** Positions the object in the center of the column on the page.
   - **Outside Left Margin** Positions the object beyond the left margin of the topic text.
   - **Outside Right Margin** Positions the object beyond the right margin of the topic text.
   - **Outside Frame** Positions the object outside of the page frame.
   - **Outside Frame, Top Align** Positions the object outside of the page frame, as well as aligning it with the top of the frame.
   - **Left of Frame** Positions the object to the left of the page frame.
   - **Right of Frame** Positions the object to the right of the page frame.
   - **Center of Frame** Positions the object both vertically and horizontally in the middle of the page frame.

CLEAR

Use this field to position an object so that it is "clear" of an adjacent object. For example, let's say you have already inserted an object and applied the float left property to it. If you then insert another object immediately after the first object, you want to make sure that the second object doesn't rest next to the first object. Instead, you want the second object to be placed completely below the first object. Therefore, you can apply a clear property to the second object.

- **None** Does not apply the clear property to the object.
- **Left Side** The object will be placed below the bottom outer edge of a previous object that is floating left.
- **Right Side** The object will be placed below the bottom outer edge of a previous object that is floating right.
- **Both Sides** The object will be placed below the a previous object, whether it is floating left or right.

VERTICAL ALIGNMENT

Use this field to adjust where the item is positioned vertically.

- **Baseline** The baseline of the box will be aligned with the baseline of the parent box.
- **Text Top** The top of the box will be aligned with the top of the parent element's font.
- **Text Bottom** The bottom of the box will be aligned with the bottom of the line box.
- **Top** The top of the box will be aligned with the top of the line box.
- **Middle** The vertical midpoint of the box will be aligned with the baseline of the parent box, plus half the x-height of the parent.
- **Bottom** The bottom of the box will be aligned with the bottom of the line box.

5. Click **OK**.
6. Click to save your work.

Note: If you want to adjust the space between the object and the text that flows next to it, you can modify the margins on the object (using the Borders & Margins tab in the dialog).

Paragraph Formatting

You can affect the look and behavior of paragraphs in various ways. These settings can be applied locally or to the style used for the paragraph. Modifying the style is typically preferable to changing the settings locally for a single paragraph.

Following are some of the more common ways that you can format paragraphs. This guide provides step and details for some of the tasks that are especially important for print-based output (i.e., those listed below with page references after them). For more information about the other tasks, including steps, see the online Help or the Flare *Styles Guide*.

- **Alignment** You can format a paragraph so that the text is aligned right, left, centered, or justified.
- **Autonumbering** You can apply an autonumber format to paragraphs so that certain content and/or incremented numbering displays with it. This is useful for numbering elements such as chapters, figures, or tables. See "Autonumbers for Styles" on page 257.
- **Background** You can set a background color and/or image on a paragraph.
- **Borders** You can add borders around a paragraph. Borders can be added on any side of a paragraph (left, right, top, bottom), or all around it.
- **Borders—Rounded** For most output formats, you can use CSS3 border-radius style properties to create rounded borders on block elements, such as paragraphs and blockquotes.
- **Breaks** You can apply a page, column, or frame breaks to a paragraph or heading. For example, you might do this if you want the paragraph or heading to start at the beginning of the next page or column. You might apply a frame break if you want to make sure that only certain text, such as a heading, appears in a certain body frame in a page layout. These features are used for print-based output. See "Setting Page and Column Breaks" on page 283 and "Setting Frame Breaks on Paragraphs and Headings" on page 458.
- **Drop Caps/Initial Caps** You can create an effect on a paragraph so that the initial letter is different than the others and drops down to the lines below.
- **Hanging Punctuation** You can use styles to create hanging punctuation on block items such as paragraphs in Flare. Hanging punctuation lets you "hang" certain punctuation characters outside the block element, allowing the text to align.
- **Hyphenation** You can specify whether words at the end of a line in a paragraph should be hyphenated before continuing to the next line. You can also determine minimum word and character settings to be used for hyphenation. See "Setting Hyphenation" on page 281.
- **Indentation** You can indent paragraphs so that they start or end at a certain distance from the left or right side of the page frame.
- **Line Spacing** You can specify the amount of spacing between lines in a paragraph.
- **Moving Paragraphs** You can move paragraphs and other block content (e.g., lists, images) around through the use of structure bars.

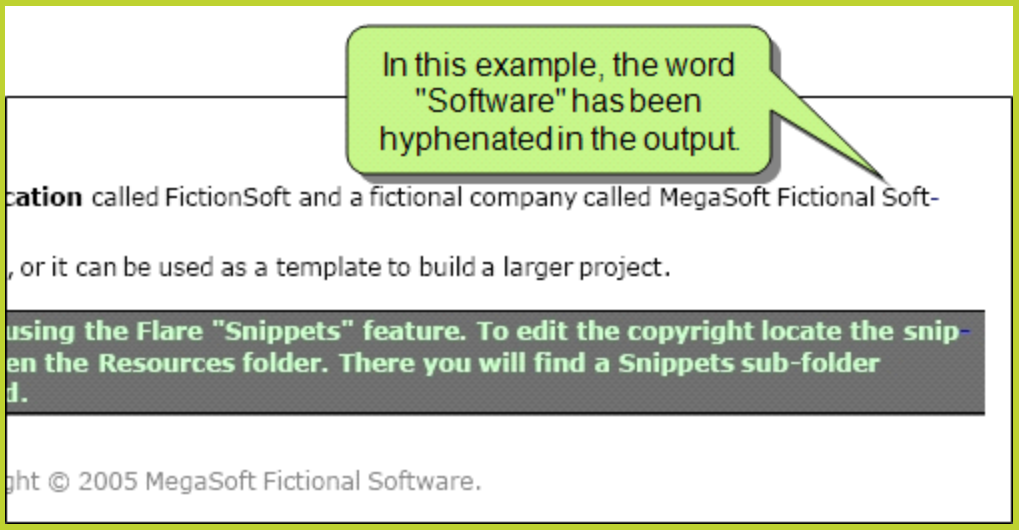
- **Next Style** You can specify that a particular style should be used when you press Enter at the end of the current style. For example, after you type text for a heading and press Enter, you might want the next style to be something like p.TopicText, rather than the main <p> tag.
- **Positioning** You can adjust the positioning of a paragraph. For example, you can float it to the left of the page layout frame. You can do this by applying a position setting on the style used by the paragraph. See "Positioning Paragraphs" on page 294.
- **Short line elimination** You can use this feature to automatically adjust word spacing if the last line of a paragraph is only a certain number of characters long. Therefore, the spacing may be widened to make the last line longer, or the spacing may be narrowed to bring the words in the last line up to the previous line. See "Setting Short Line Elimination" on page 307.
- **Spacing Above/Below** You can set the amount of spacing above and below paragraphs.
- **Widow and Orphan Control** You can use widow and orphan control to avoid instances where "leftover" lines from a paragraph are shown at the top or bottom of a page or column. This feature is used for print-based output. See "Widows and Orphans" on page 311 and "Setting Widow and Orphan Control" on page 314.

Setting Hyphenation

This feature is supported in all outputs.

You can specify whether words at the end of a line in a paragraph should be hyphenated before continuing to the next line. You can also determine minimum word and character settings to be used for hyphenation.

EXAMPLE



HOW TO SET HYPHENATION USING A STYLE

1. From the Content Explorer, open the stylesheet that you want to modify.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate paragraph style. For example, you can select the parent **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **Unclassified** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
7. Click in the value column on the right side of the appropriate property to specify the hyphenation settings.
   - **mc-hyphenate** Select whether you always or never want words to be hyphenated at the end of lines.
   - **mc-hyphenate-maximum-adjacent-line-count** Enter the maximum number of lines next to each other that are allowed to end with a hyphenated word. For example, if you do not mind seeing three consecutive lines ending in a hyphenated word, but you want to avoid seeing a fourth adjacent line with a hyphenated word, you can enter 3 in this field.
   - **mc-hyphenate-shortest-prefix** Enter the minimum number of characters that must remain on the initial line when a word is hyphenated. For example, if you enter 4 in this field, a word that normally could be hyphenated after two characters would not be broken at that point. Instead, it would not be broken until at least four letters make an appearance on the first line.
   - **mc-hyphenate-shortest-suffix** Enter the minimum number of characters that must be carried over to the second line when a word is hyphenated. For example, if you enter 3 in this field, a hyphenated word must have at least three characters on the second line after it has been broken.
   - **mc-hyphenate-shortest-word** Enter the minimum number of characters that a word must have in order to be hyphenated.
8. Click to save your work.

Setting Page and Column Breaks

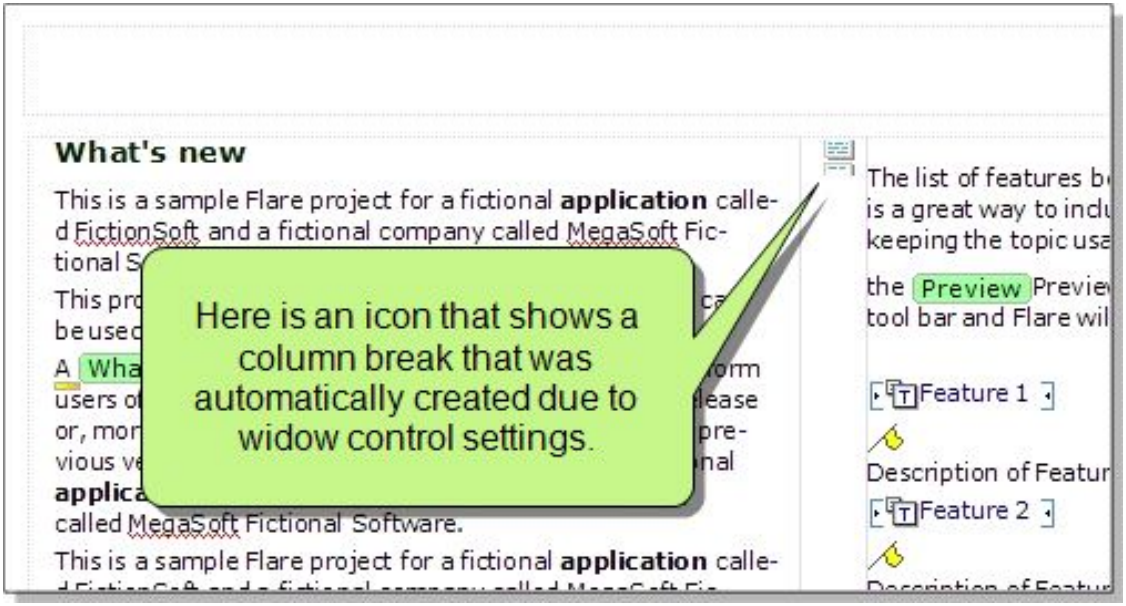
This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

You can apply a page or column break to a paragraph or heading. For example, you might do this if you want the paragraph or heading to start at the beginning of the next page or column. This feature is used for print-based output.

If you are working on a document in the Print Layout mode, you may see icons in the margins next to text. These icons indicate where a paragraph has been moved to another page or column as a result of a page or column break, or due to widow or orphan control.

Following are the types of icons that you might see in a document.

	Explicit Page Break This icon displays if you have created a page break before a paragraph.
	Explicit Page Break by Previous This icon displays if you have created a page break after a paragraph.
	Explicit Column Break This icon displays if you have created a column break before a paragraph.
	Explicit Column Break by Previous This icon displays if you have created a column break after a paragraph.
	Orphan Controlled This icon displays if a paragraph has been adjusted due to orphan control.
	Widow Controlled This icon displays if a paragraph has been adjusted due to widow control.


What's new
This is a sample Flare project for a fictional application called FictionSoft and a fictional company called MegaSoft Fictional S
called MegaSoft Fictional Software.
This is a sample Flare project for a fictional application calle-
Here is an icon that shows a column break that was automatically created due to widow control settings.
Feature 1
Description of Featur
Feature 2

HOW TO SET A PAGE OR COLUMN BREAK USING A STYLE

1. From the Content Explorer, open the stylesheet that you want to modify.
2. In the local toolbar, make sure the first button displays Advanced View (which means that the Simplified view is currently shown in the editor). If the button displays Simplified View instead, then click it.

   Note: For steps using the Advanced View, see the online Help.

   Note: With the Advanced view, you can set page breaks only. With the Simplified view, you can set both page and column breaks.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate style. For example, you can select the base **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note). You can also place a page break on a heading style (such as <h1>).
5. In the local toolbar of the editor, click . The Properties dialog opens.
6. Select the **Breaks** tab.
7. Use the **Page Break** and **Column Break** sections on the tab to specify the settings for a page or column break, respectively.

   BEFORE

   You can select one of the options for setting a page or column break before the element.

   - **Automatic** A page break will neither be forced nor prevented before the element.
   - **Always** A page break will always occur before the element.
   - **Avoid** A page break will not occur before the element.
   - **Force to 'left page'** One or two page breaks will occur before the element so that the next page is formatted as a left page.
   - **Force to 'right page'** One or two page breaks will occur before the element so that the next page is formatted as a right page.

AFTER

You can select one of the options for setting a page or column break after the element.

- **Automatic** A page break will neither be forced nor prevented after the element.
- **Always** A page break will always occur after the element.
- **Avoid** A page break will not occur after the element.
- **Force to 'left page'** One or two page breaks will occur after the element so that the next page is formatted as a left page.
- **Force to 'right page'** One or two page breaks will occur after the element so that the next page is formatted as a right page.

INSIDE

You can select one of the options for setting a page break inside the "rendering box" of the element.

- **Automatic** A page break will neither be forced nor prevented inside the rendering box of the element.
- **Avoid** A page break will not occur inside the rendering box of the element.

8. In the Properties dialog, click **OK**.
9. Click to save your work.

Note: If you are using a multi-column page layout and set an "Inside" break to "Avoid," you must specify this in both the "Page Break" and "Column Break" fields.

Note: It is also possible to set breaks on tables. For more information see the online Help or the Flare *Styles Guide*.

Determining Wrap Behavior on Line Breaks Using Styles

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

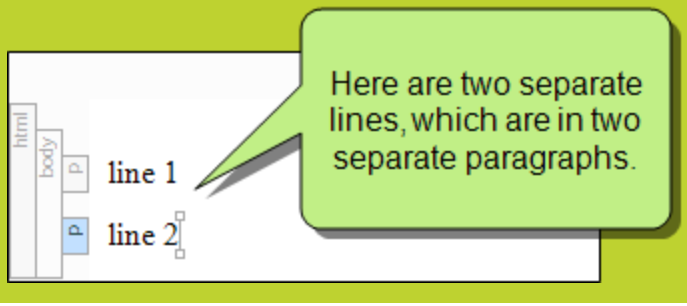
You can apply line breaks and then determine the wrap behavior on line breaks using styles.

The line break tag in XHTMLis <br/>. Line breaks end the current line and the text or image after it will be moved to the very next line, in a way similar to pressing the Return key in a word processor.

However, there is a difference. Pressing the Return key will start a new paragraph with a <p> tag. Using the line break tag will start a new line without creating a new paragraph tag.

E X A M P L E

Below are two lines that were created by pressing Return. Notice that they are contained in separate paragraph <p> tags.



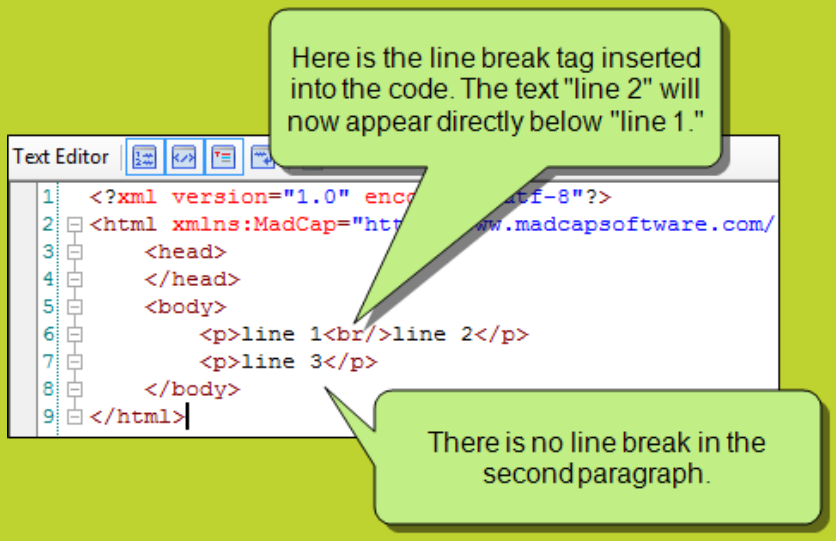
Here is what these lines look like when viewing the XHTML code in the Internal Text Editor.

Here are the same two paragraphs in the XHTML code. Note that there is no space between them in the code.

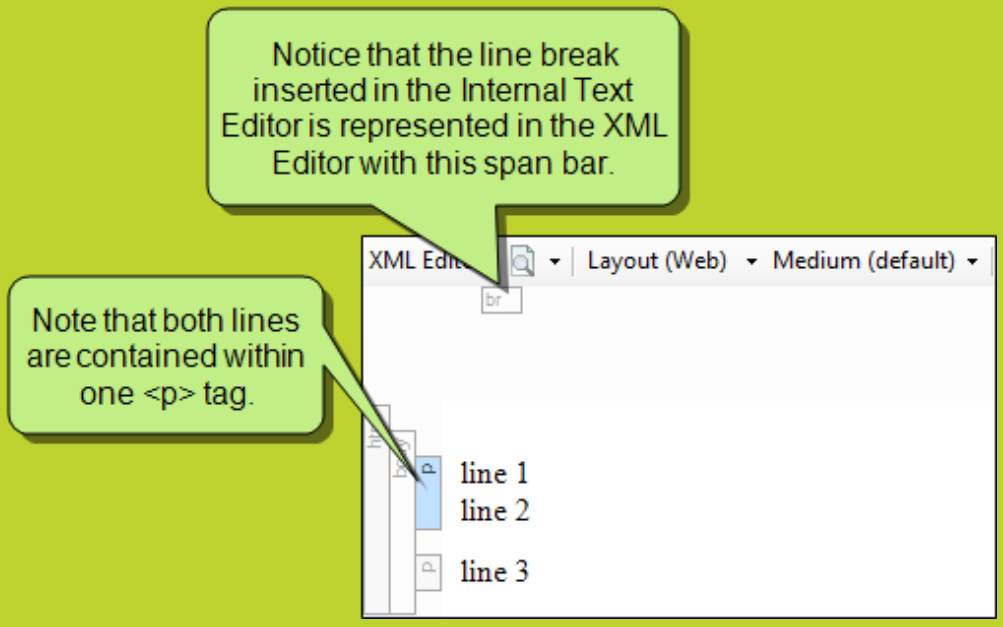
Text Editor

```
1  <?xml version="1.0" encoding=
2  <html xmlns:MadCap="http://
3      <head>
4      </head>
5      <body>
6          <p>line 1</p>
7          <p>line 2</p>
8      </body>
9  </html>
```

If you insert the line break tag into the XHTML code, it might look like this.



Here is how that code will appear in the XML Editor. Notice that the first two lines are in the same paragraph, even though they are on separate lines.



You might want to use line breaks for adjusting particular areas of a topic or for placing text immediately below images. You can use the line break tag inside many other XHTML elements such as tables, lists and headings.

Line breaks are best used for solving minor formatting issues on individual cases. Large formatting issues across many topics are best handled by using styles.

HOW TO INSERT LINE BREAKS

1. Open a topic.
2. At the bottom of the XML Editor, click the **Text Editor** tab to see the markup. You can also use split the editor between the XML Editor and the Internal Text Editor.
3. With the topic open in the Internal Text Editor, identify the location in the code where you want the line break to be. This will usually be in a paragraph element. Then type the following.

   ```
   <br/>
   ```

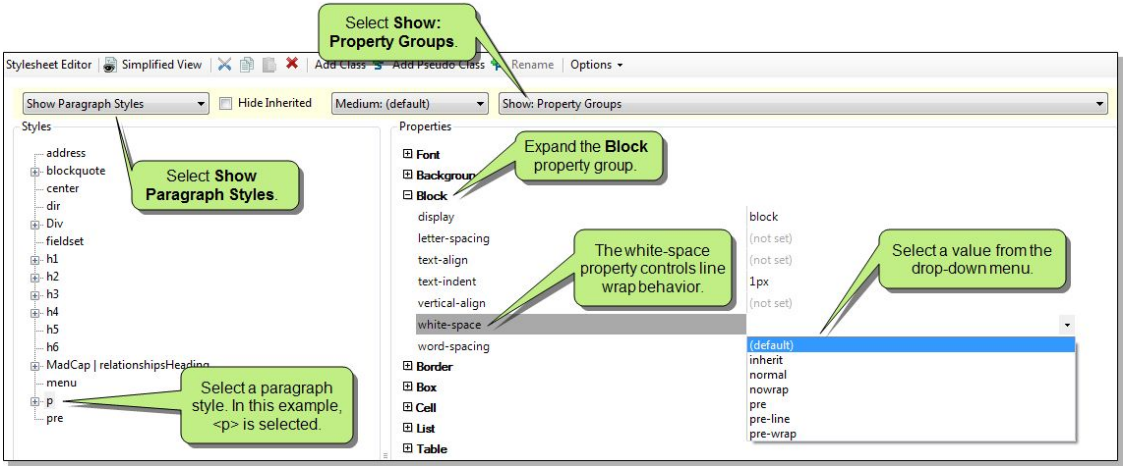
   This is the line break tag.
4. Click to save your work.

Wrap behavior on line breaks determines how and when the line ends and begins (or "wraps") on <br/> tags from one line to the next. It also determines how white space is treated when the line wraps. Wrap behavior is controlled by the **white-space** property.

HOW TO DETERMINE WRAP BEHAVIOR ON LINE BREAKS USING STYLES

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.
3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate paragraph style. For example, you can select the parent **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **Block** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
7. To the right of **white-space**, click in the field and select one of the following from the drop-down menu.
   - **default** Sets the property to the default value, which is "normal." See below.
   - **inherit** The value for line breaks will be inherited from the parent element.
   - **normal** Any sequences of white-space will be converted to a single white-space. The text will wrap on line breaks when necessary.
   - **nowrap** Any sequences of white-space will be converted to a single white-space. The text will never wrap to the next line and will continue on the same line until a **
** tag appears.
   - **pre** The white-space will be preserved by the browser. The text will only wrap on line breaks.
   - **pre-line** Any sequences of white-space will be converted to a single white-space. The text will wrap on line breaks when necessary.
   - **pre-wrap** The white-space will be preserved by the browser. The text will wrap on line breaks when necessary.
8. Click to save your work.


Select Show: Property Groups.
Stylesheet Editor
Simplified View
Add Class
Add Pseudo Class
Rename
Options
Show Paragraph Styles
Hide Inherited
Medium: (default)
Show: Property Groups
Styles
address
blockquote
center
dir
Div
fieldset
h1
h2
h3
h4
h5
h6
MadCap | relationshipsHeading
menu
p
pre
Select Show Paragraph Styles.
Select a paragraph style. In this example, <p> is selected.
Properties
Font
Backgroun
Block
Expand the Block property group.
display
letter-spacing
text-align
text-indent
vertical-align
white-space
word-spacing
Border
Box
Cell
List
Table
The white-space property controls line wrap behavior.
block
(not set)
(not set)
1px
(not set)
Select a value from the drop-down menu.
(default)
inherit
normal
nowrap
pre
pre-line
pre-wrap

Positioning Paragraphs

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

After you add a paragraph or heading to a topic, you can adjust its positioning on the page. For example, you can float it to the left of the page layout frame to create a side heading. You can do this by applying a positioning setting on the style used by the paragraph.

HOW TO POSITION A PARAGRAPH ON A PAGE USING A STYLE

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate paragraph style. For example, you can select the parent **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. Use any of the following set of instructions to select "float," "clear," and "vertical alignment" settings for the paragraph.

   FLOAT

   You can specify where to place the paragraph on the page.

   In the **Properties** section, expand the **Unclassified** group. Click in the value column to the right of the **mc-float** property and select any of the available options.

   - **center** Positions the paragraph in the center of the column on the page.
   - **frame-center** Positions the paragraph both vertically and horizontally in the middle of the page frame.
   - **left** Positions the paragraph on the left side of the page frame, allowing you to type text to the right of the paragraph.
   - **none** Does not place the paragraph in a specific location.

- **outside-frame** Positions the paragraph outside of the page frame.
- **outside-frame-left** Positions the paragraph beyond the left margin of the topic text.
- **outside-frame-right** Positions the paragraph beyond the right margin of the topic text.
- **outside-frame-top** Positions the paragraph outside of the page frame, as well as aligning it with the top of the frame.
- **outside-left** Positions the paragraph to the left of the page frame.
- **outside-right** Positions the paragraph to the right of the page frame.
- **right** Positions the paragraph on the right side of the page frame, allowing you to type text to the left of the paragraph.

CLEAR

You can position a paragraph so that it is "clear" of an adjacent paragraph. For example, let's say you have already inserted a paragraph and applied the float left property to it. If you then insert another paragraph immediately after the first paragraph, you want to make sure that the second paragraph doesn't rest next to the first paragraph. Instead, you want the second paragraph to be placed completely below the first paragraph. Therefore, you can apply the clear property to the second paragraph.

In the **Properties** section, expand the **Box** group. Click in the value column to the right of the **clear** property and select any of the available options.

- **both** The paragraph will be placed below the a previous paragraph, whether it is floating left or right.
- **inherit** Uses the same setting as the parent tag.
- **left** The paragraph will be placed below the bottom outer edge of a previous paragraph that is floating left.
- **none** Does not apply the clear property to the paragraph.
- **right** The paragraph will be placed below the bottom outer edge of a previous paragraph that is floating right.

VERTICAL ALIGNMENT

You can adjust where the paragraph is positioned vertically.

In the **Properties** section, expand the **Block** group. Click in the value column to the right of the **vertical-align** property. In the popup, click the arrow in the upper-right corner and select any of the available options. Click **OK** when you are finished.

- **baseline** The baseline of the box will be aligned with the baseline of the parent box.
- **bottom** The bottom of the box will be aligned with the bottom of the line box.

- **middle** The vertical midpoint of the box will be aligned with the baseline of the parent box, plus half the x-height of the parent.
- **sub** The baseline of the box will be lowered to the proper position for subscripts of the parent's box. (This value has no effect on the font size of the element's text.)
- **super** The baseline of the box will be raised to the proper position for superscripts of the parent's box. (This value has no effect on the font size of the element's text.)
- **text-bottom** The bottom of the box will be aligned with the bottom of the line box.
- **text-top** The top of the box will be aligned with the top of the parent element's font.
- **top** The top of the box will be aligned with the top of the line box.
- **Inherit** Uses the same setting as the parent tag.
- **Length** Lets you enter a specific measurement.

7. Click to save your work.

Note: For examples of the different ways you can configure headings, including creating side headings, see "Heading Examples" on the following page.

Note: If you want to adjust the space between a floating paragraph and the text that flows next to it, you can modify the margins on the paragraph (using the Indentation section on the Paragraph tab).

Note: For additional details on the rules for floating objects, see http://www.w3c.org.

Note: You can also position objects, such as images and text boxes, as well as autonumbers. For more information see the online Help or the Flare *Styles Guide*.

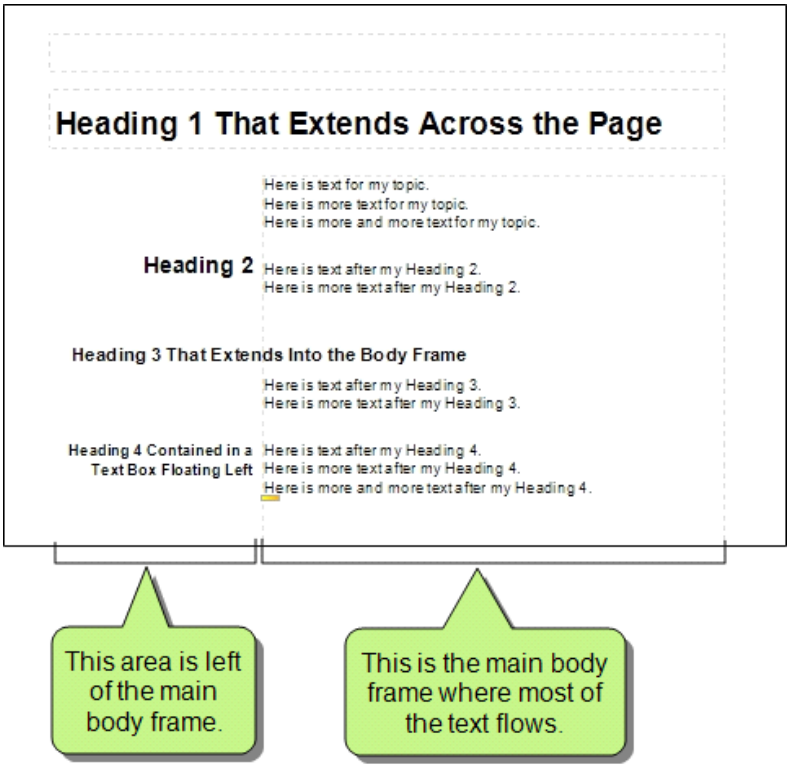
Heading Examples

When creating headings for print-based output, you have many configuration options. You can simply use the <h1> through <h6> style tags provided in Flare, and you can modify the style settings to meet your needs.

Some of the advanced features available that you might use when configuring headings for print-based output include:

- Dual body frames in a page layout (one for major headings and the other for the main topic content)
- Positioning headings
- Text boxes

Following is a topic shown in Print Layout mode with multiple headings. Each heading was configured differently to affect how it is displayed on the page.



Heading 1 Example

The Heading 1 example was created by adding two body frames to a page layout.

The first body frame was added to the top of the page layout and is high enough only to fit the first heading in the topic. It extends across the entire page.

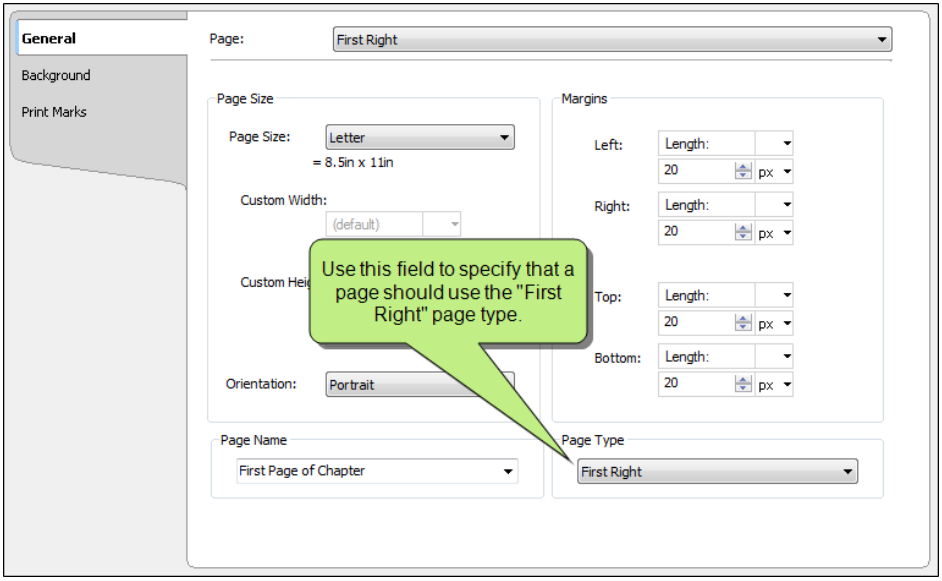
The second body frame is much taller, but is not as wide. It was designed to hold the main content of the chapter, with space to the left that can hold subheadings, text boxes, notes, tips, images and so on.

You might consider using this type of configuration if you know for certain that the content to be displayed in the first body frame is a major heading that will always display at the top of a page, rather than somewhere in the middle of it. For example, you might create a page layout with a "First Right" page type that is designed to hold the beginning of each chapter in your output. By having a dual frame configuration (such as the one described) on the initial page only, you can be assured that the first body frame is used only by the heading that begins that chapter.

On the other hand, if you want to have headings that stretch across multiple areas of a page in random locations, you probably do not want to use this method, but rather the method described for the Heading 3 example.

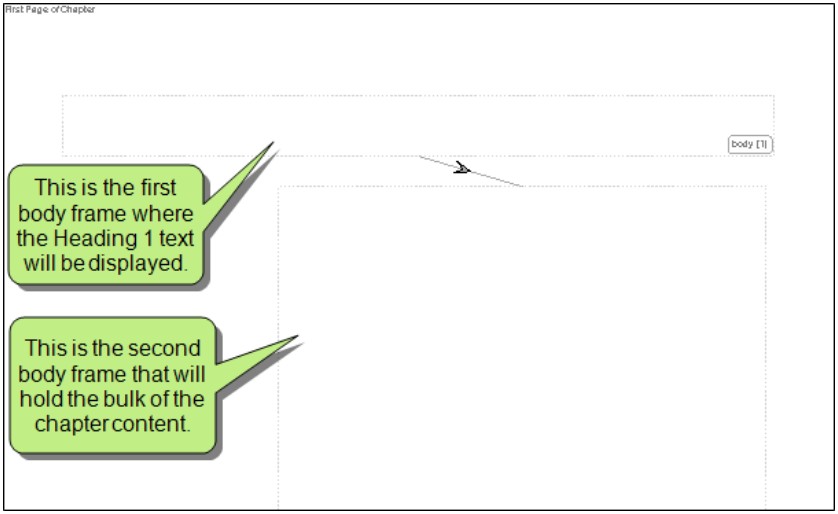
HOW DID WE CREATE THE HEADING 1 EFFECT IN THIS EXAMPLE?

1. Create or open a page layout. See "Adding Page Layouts" on page 348 or "Opening Page Layouts" on page 353.
2. Create a page in the layout using the "First Right" page type. See "Adding Pages" on page 355 and "Specifying Page Types" on page 372.

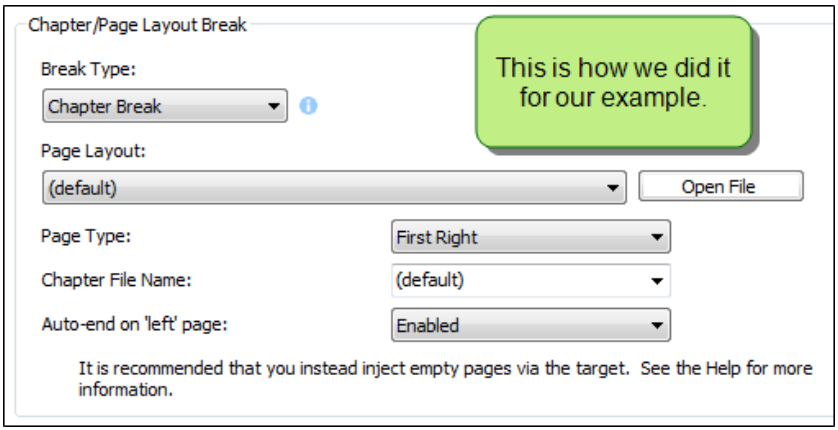


3. If there is not already a body frame on the page, add one. See "Adding Page Layout Frames" on page 356.
4. Drag the edges of the first body frame to resize it to hold only a topic heading. Position the frame in the upper part of the page. In our example, the first body frame is located at **30 pixels** on the **Left** and at **70 pixels** on the **Top**. It is **700 pixels wide** and **60 pixels high**. See "Specifying Frame Size" on page 490.
5. Add a second body frame. Resize and position it below the first body frame. In our example, the second body frame is located at **250 pixels** on the **Left** and at **160 pixels** on the **Top**. It is **480 pixels wide** and **780 pixels high**.

   An arrow points from the first body frame to the second, indicating the direction of content flow.

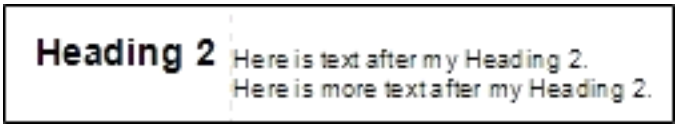


6. In your outline TOC, specify chapter breaks on the entries where you want new chapters to begin. When doing this, choose your page layout and specify that the chapter should begin with the "First Right" page type. See "Specifying Chapter and Page Layout Breaks" on page 542.



Heading 2 Example

The Heading 2 Example was created by simply positioning the <h2> style tag so that it appears to the left of the body frame. We also adjusted the indentation to the right of that tag, as well as the space above it. Finally, we created a new class of the <p> tag and adjusted the space above it. We used this style class for the first paragraph following our <h2> text. For paragraphs after that, we just used the parent <p> tag.



One benefit of this method is that it is relatively simple. However, it is best when used with headings that are not very long. If you have headings that need to wrap to a second line, you should probably use a text box, which is what we used for the Heading 4 example.

HOW DID WE CREATE THE HEADING 2 EFFECT IN THIS EXAMPLE?

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Advanced View (which means that the Simplified view is currently shown in the editor). If the button displays Simplified View instead, then click it.
3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. In the grid, select the style for the heading (in our example, it is **h2**).
5. In the local toolbar, click .
6. In the Properties dialog, select the **Paragraph** tab.
7. In the **Indentation** section, set the **Right** field to **12 px**.
8. In the **Spacing** section, set the **Before** field to **22 px**.
9. Select the **Position** tab.
10. In the **Float** field, select **Left of Frame**.
11. In the **Vertical Alignment** field, select **Text Bottom**.
12. Click **OK**.
13. In the Stylesheet Editor, select **p** in the grid.
14. In the local toolbar, click Add Class.
15. Give the new class a name. We typed `FirstPara` in our example.

16. Click **OK**.
17. With the new style class selected, click .
18. In the Properties dialog, select the **Paragraph** tab.
19. In the **Spacing** section, set the **Before** field to **30 px**.
20. Click to save your work.
21. Open a topic and type the text for the heading, as well as the paragraph(s) following it.
22. Click on the text to be used for the heading.
23. Select the **Home** ribbon, click in the **Style** drop-down field, and select the style for the heading (in our example, it is **h2**).
24. Click on the first paragraph following that heading.
25. In the Home ribbon, click in the **Styles** drop-down field and select your new paragraph style class (e.g., p.FirstPara).
26. Click to save your work.

Heading 3 Example

The Heading 3 Example was created by simply specifying a negative left indentation setting for the <h3> tag.

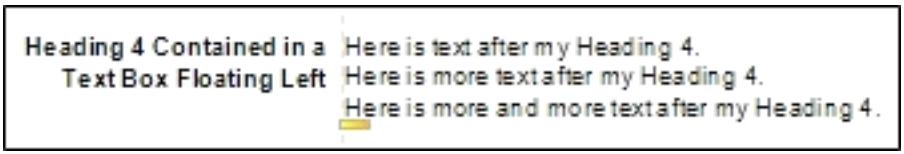
This method is extremely easy. Plus, it allows you to stretch headings across multiple areas of a page in random locations.

HOW DID WE CREATE THE HEADING 3 EFFECT IN THIS EXAMPLE?

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Advanced View (which means that the Simplified view is currently shown in the editor). If the button displays Simplified View instead, then click it.
3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. In the grid, select the style for the heading (in our example, it is **h3**).
5. In the local toolbar, click .
6. In the Properties dialog, select the **Paragraph** tab.
7. In the **Indentation** section, set the **Left** field to a negative number. In our example, we set it to **-200 pixels**.
8. Click **OK**.
9. Open a topic and type the text for the heading.
10. Click on the text to be used for the heading.
11. Select the **Home** ribbon, click in the **Style** drop-down field, and select the style for the heading (in our example, it is **h3**).
12. Click to save your work.

Heading 4 Example

The Heading 4 Example was configured by creating a style class of the tag and using it when inserting a text box. The style class for the text box specifies that it should be floated to the left of the body frame, have text that is aligned right, and have 30 pixels of space above it. In addition, we created a new class of the <p> tag and adjusted the space above it. We used this style class for the first paragraph following our <h4> text. For paragraphs after that, we just used the parent <p> tag.



This method takes a bit more time, but it very useful if you want the entire heading to be displayed to the left of the frame, with text wrapping around to additional lines when necessary. Meanwhile, the text after that heading flows to the right inside the body frame.

HOW DID WE CREATE THE HEADING 4 EFFECT IN THIS EXAMPLE?

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Advanced View (which means that the Simplified view is currently shown in the editor). If the button displays Simplified View instead, then click it.
3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. In the grid, select **div**.
5. In the local toolbar, click Add Class.
6. Give the new class a name. We typed `h4TextBox` in our example.
7. Click **OK**.
8. With the new style class selected, click .
9. In the Properties dialog, select the **Paragraph** tab.
10. In the **Alignment** section, select **Right**.
11. In the **Indentation** section, set the **Right** field to **12 px**. (You may need to first click the down arrow in the upper-right corner and select **Length**.)
12. In the **Spacing** section, set the **Before** field to **30 px**. (You may need to first click the down arrow in the upper-right corner and select **Length**.)

13. Select the **Position** tab.
14. In the **Float** field, select **Left of Frame**.
15. In the **Vertical Alignment** field, select **Text Bottom**.
16. Click **OK**.
17. In the Stylesheet Editor grid, select **p**.
18. In the local toolbar, click Add Class.
19. Give the new class a name. We typed `FirstPara` in our example.
20. Click **OK**.
21. With the new style class selected, click .
22. In the Properties dialog, select the **Paragraph** tab.
23. In the **Spacing** section, set the **Before** field to **30 px**.
24. Click to save your work.
25. Open a topic and click at the location where you want to add the heading.

> **Note:** It is often easiest if you already have some text after the location where you are inserting the text box. Therefore, type some text that you want to appear after the heading (i.e., the first paragraph or two after the heading).

26. Select **Insert>Text Box**.
27. In the dialog, select the div class (e.g., div.h4TextBox).
28. Click **OK**.
29. Unless you also added a background or border to the text box, the text box is invisible at first (since it does not contain any text). Click at the beginning of the first paragraph following the text box and press the left arrow on your keyboard a couple of times until you see the cursor to the left of the body frame. This means that the cursor is now inside the text box.
30. Inside the text box, type the text for the heading.
31. Click on the text to be used for the heading.
32. Select the **Home** ribbon, click in the **Style** drop-down field, and select the style for the heading (in our example, it is **h4**).
33. Click on the first paragraph following the heading in the text box.

34. In the Home ribbon, click in the **Style** drop-down field and select your new paragraph style class (e.g., p.FirstPara).

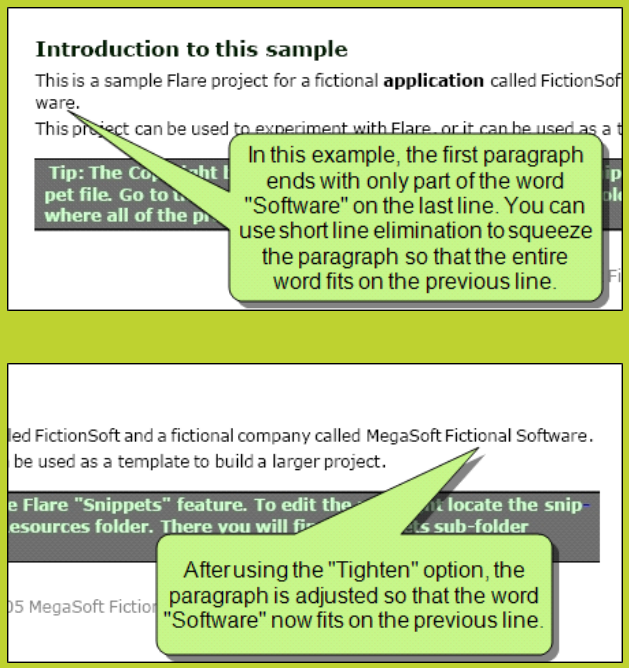
35. Click to save your work.

Setting Short Line Elimination

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

You can use this feature to automatically adjust word spacing if the last line of a paragraph is only a certain number of characters long. Therefore, the spacing may be widened to make the last line longer, or the spacing may be narrowed to bring the words in the last line up to the previous line.

EXAMPLE



HOW TO SET SHORT LINE ELIMINATION USING A STYLE

1. From the **Resources/Stylesheets** subfolder in the Content Explorer, open the stylesheet that you want to modify.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate paragraph style. For example, you can select the parent **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **Unclassified** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
7. Click in the value column on the right side of the appropriate property to specify the short line settings.

   It is a good idea to experiment with the various settings until you achieve the "last line" behavior that suits you best. The short line elimination properties that you might want to set are as follows.

   MC-SHORT-LINE

   Specify the length at which a line is considered "short," and therefore the short line settings come into play. If you do not select a length, a line is considered short if it has 10 or fewer characters. You can specify one of the following settings.

   - **hyphenated-last-word** If the last word in the paragraph is hyphenated, Flare will run short line elimination. To use this option, click the down arrow in the upper-right corner of the popup and select **hyphenated-last-word**.
   - **Inherit** Uses the same setting as the parent tag.
   - **Length** You can choose a specific length for a line to be considered short. To use this option, click the down arrow in the upper-right corner of the popup and select **Length**. Then enter a number in the lower-left field. Finally, click the down arrow in the lower-right corner and select a unit of measurement (UOM).

   MC-SHORT-LINE-LOOSEN-END-LENGTH

   Specify the length (number of characters) at which a line is considered "long enough." For example, let's say you

have specified 8 characters as the length of a short line (mc-short-line), and you have specified 15 characters as the length of a long line (in this field). In that case, Flare will not allow the final line in a paragraph to have only 8 characters, and when you type content so that the text wraps around to a new line, the paragraph is automatically adjusted so that the new line always starts at a minimum of 15 characters.

MC-SHORT-LINE-LOOSEN-MAXIMUM

Specify the maximum number of pixels to loosen during short line elimination.

MC-SHORT-LINE-METHOD

Select whether to enable short line elimination, as well as how it will work.

- **inherit** Uses the short-line setting of the parent tag.
- **loosen** Flare will try to increase the kerning (i.e., white space becomes wider).
- **loosen-tighten** Flare will first try to increase the kerning (i.e., the white space will become wider) to the maximum setting. Then it will try to decrease the kerning (i.e., the white space will become more narrow).
- **never** Lines will not be adjusted.
- **tighten** Flare will try to decrease the kerning (i.e., the white space will become more narrow).
- **tighten-loosen** Flare will first try to decrease the kerning (i.e., the white space will become more narrow) to the maximum setting. Then it will try to increase the kerning (i.e., the white space will become wider).

MC-SHORT-LINE-STEP

Specify the number of pixels of kerning should be used incrementally on the entire paragraph until the desired effect is achieved. For example, if you enter .5, the kerning will occur in increments of .5 pixels.

MC-SHORT-LINE-TIGHTEN-MAXIMUM

Specify the maximum number of pixels to tighten during short line elimination.

8. Click to save your work.

Note: In order to see the results of this feature in the XML Editor, you must be using Print Layout mode, as opposed to Web Layout mode. For more information about layout modes, see the online Help.

Widows and Orphans

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

You can use widow and orphan control to avoid instances where "leftover" lines from a paragraph are shown at the top or bottom of a page or column.

- **Widow Control** Determines the minimum number of lines in a paragraph to be left at the *top* of a page or column.
- **Orphan Control** Determines the minimum number of lines in a paragraph to be left at the *bottom* of a page or column.

E X A M P L E

Let's say that you have a paragraph containing seven lines. The first two lines of this paragraph are found at the bottom of page 11, and the final five lines are found at the beginning of page 12. If you want the two lines from page 11 to be pushed to page 12, so that all lines of that paragraph are on the same page, you can set the orphan number at 3. This means that there must be at least three lines at the bottom of the page. But because there are only two, those lines are forced to the next page.

Tasks Associated with Widows and Orphans

Following are the tasks that you may perform when it comes to widow and orphan control.

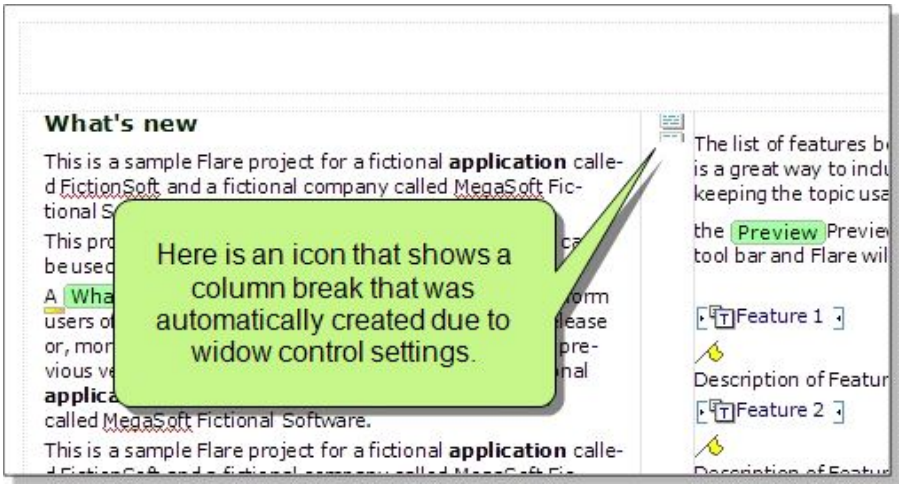
- **Enable Widow and Orphan Control** By default, widow and orphan control is already enabled when you first install and launch Flare. When this feature is turned on, you can see the effects in the Print Layout mode in the XML Editor (as well as in the output). If you want to turn this feature off or on again, you can do so from the XML Editor. See "Enabling and Disabling Widow/Orphan Control" on page 313.
- **Set Widow and Orphan Control Settings** By default, the setting for both widow and orphan control is 2. In other words, Flare will always ensure that at least two lines are shown at the top or bottom of a page. If there is only one line, Flare adjusts the text on the page accordingly. If you want to change the default setting, you can do so. See "Setting Widow and Orphan Control" on page 314.

Icons for Page and Column Breaks

If you are working on a document in the Print Layout mode, you may see icons in the margins next to text. These icons indicate where a paragraph has been moved to another page or column as a result of a page or column break, or due to widow or orphan control. You can set page breaks, column breaks, orphan control, or widow control either manually on individual paragraphs or you can set them on styles. You can click on any of the icons in the document to open the paragraph properties. See "Setting Page and Column Breaks" on page 283.

Following are the types of icons that you might see in a document.

	Explicit Page Break This icon displays if you have created a page break before a paragraph.
	Explicit Page Break by Previous This icon displays if you have created a page break after a paragraph.
	Explicit Column Break This icon displays if you have created a column break before a paragraph.
	Explicit Column Break by Previous This icon displays if you have created a column break after a paragraph.
	Orphan Controlled This icon displays if a paragraph has been adjusted due to orphan control.
	Widow Controlled This icon displays if a paragraph has been adjusted due to widow control.



Enabling and Disabling Widow/Orphan Control

By default, widow and orphan control is already enabled when you first install and launch Flare. When this feature is turned on, you can see the effects in the Print Layout mode in the XML Editor (as well as in the output). If you want to turn this feature off or on again, you can do so from the XML Editor.

HOW TO ENABLE AND DISABLE WIDOW AND ORPHAN CONTROL

1. Open a topic.
2. In the local toolbar of the XML Editor, click the down arrow of the **Show tags** button . Then select **Enable Orphan/Widow Control** to add the check mark next to it. If you select this option and the check mark is removed, widow and orphan control is disabled.

Setting Widow and Orphan Control

You can use widow and orphan control to avoid instances where "leftover" lines from a paragraph are shown at the top or bottom of a page or column. For more about widows and orphans, see the online Help.

HOW TO SET WIDOW AND ORPHAN CONTROL USING A STYLE

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate paragraph style. For example, you can select the parent **p** tag, or you can select a class that you may have created for that tag (e.g., p.Tip, p.Note).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **PrintSupport** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
7. Click to the right of **orphans**, and enter the number of leftover lines that you want to allow at the bottom a page or column.
8. Click to the right of **widows**, and enter the number of leftover lines that you want to allow at the top of a page or column.
9. Click to save your work.

Note: In order to see the results of this feature in the XML Editor, you must be using Print Layout mode, as opposed to Web Layout mode. For more information about layout modes, see the online Help.

CHAPTER 5

Using Single-Sourcing Features

When you create print-based output, there are many techniques for single-sourcing your content. That is, you can create content once and reuse it in multiple ways.

This chapter discusses the following:

Setting Styles for Print Output in a Regular Stylesheet 316
Setting Table Styles for Print Output 318
Creating Single-Source Images 321
Resizing Images 323
Condition Tags 326

Setting Styles for Print Output in a Regular Stylesheet

A regular stylesheet allows you to single-source formatting by setting the properties in one place and reusing them throughout your project. But what if you want your online output to look one way and your printed output to look another way? Rather than creating a style for online output and another style for printed output, you can use a single style and provide it with two sets of properties—one set to use for online output and another set to use with printed output. You can accomplish this through the use of a medium in your stylesheet.

HOW TO SET STYLES FOR PRINT OUTPUT IN A REGULAR STYLESHEET

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. Set the style properties to be used for your online output as follows:
   a. In the local toolbar of the Stylesheet Editor, do one of the following.
      - In the **Medium** field, make sure **Medium: (default)** is selected.
      - Click the down arrow in the **Medium** field and select **Medium: non-print**.
   b. Select a style and set the properties for it. Do this for each style that you want to use in your online output.
3. Set the style properties to be used for your printed output as follows:
   a. In the local toolbar of the Stylesheet Editor, click the down arrow in the **Medium** field and select **Medium: print** or **Medium: [name of print medium]**.

> **Note:** You can also create a new medium if necessary. You actually might find it preferable to do this. For example, if you want page breaks before a particular heading for print output, but not when users send online topics to the printer, it is a good idea to create a custom print medium. The reason for this is that browsers respect the settings in the "print" medium provided by Flare. Therefore, even though your online output style medium does not have page breaks set before that heading, the application will see that you *do* have a page break specified in the print medium. And when a user tries to print a topic from your online Help, the printer will start a new page at that heading. The solution is to create a custom print medium (perhaps calling it "PDF" or "XPS"), specifying page breaks in that medium, and using it for your print output (instead of using the "print" medium provided by Flare). See "Creating Stylesheet Mediums" on page 250.

   b. Select the same styles that you edited for the online output, and set different properties for them (for the purpose of printed output).
   c. Click to save your work.
4. Apply the styles to the content throughout your project.

   For more information see the online Help or the Flare *Styles Guide*.
5. Associate the online medium with your online target as follows:
   a. Open the target to be used for online output (DotNet Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, or WebHelp Plus).
   b. In the Target Editor, select the **Advanced** tab.
   c. In the **Stylesheet Medium** section, select the medium that you used for online output (e.g., default, non-print).
6. Associate the print medium with your print target as follows:
   a. Open the target to be used for print output (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, or XHTML).
   b. In the Target Editor, select the **Advanced** tab.
   c. In the **Stylesheet Medium** section, select the medium that you used for printed output (e.g., print).
7. Select **File>Save>Save All** (if using ribbons), select **File>Save All** (if using menus), or press **CTRL+SHIFT+S**.

Setting Table Styles for Print Output

A table stylesheet allows you to single-source your formatting by setting the properties in one place and reusing them wherever you insert tables in your project. But what if you want the tables in online output to look one way and the tables in your printed output to look another way? Here are two options… **Solution #1—Two mediums:** This is the recommended solution. You can have one table stylesheet and use a medium to specify different settings for it—one medium is used for online output and another for print. **Solution #2—Two table stylesheets:** You can insert a single table at each location, using a special version of the table style for print-based output. This solution requires you to have two table stylesheets—one for online and one for print.

E X A M P L E S

Let's say you create a table stylesheet with a pattern design that displays the table with alternating green rows. The problem is that for printed output, you need the rows to display in light gray.

Suppose you decide to use the recommended solution (mediums). Let's say the target for online output is called Target A, and the one for print output is called Target B. the first step is to make sure you have two mediums. Suppose Target A is using the "default" medium, where the rows are set to use a green background. With the properties for Target A already set, you now need to specify style properties for Target B. Therefore, in the Table Style Editor, instead of selecting the "default" medium, you can select another medium (e.g., the "print" medium) and change the properties for the rows to light gray. It's the same table stylesheet and the same pattern that you are working with. The only difference is that one medium is telling Flare to display that table rows with a green background, and the other medium is telling it to use light gray. With Target A using the default medium and Target B using the other medium, the tables will display appropriately in each output.

If you decide instead to use the other solution (two table stylesheets), you first create a table stylesheet and specify settings in it appropriate for online output (e.g., green background for table rows). Then you create a secondary stylesheet. This extra table stylesheet will have design settings that are appropriate for printed output (e.g., light gray table rows). When you insert the table into your content (or edit an existing table), you select the original online table style and also select the special print version of the table style. If you generate any targets based on an online format (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus), the end user will see green rows in the table. However, if you generate any targets based on a print format (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML), the end user will see light gray rows in the table.

HOW TO CREATE A TABLE STYLE FOR PRINTED OUTPUT—TWO MEDIUMS

1. From the Resources\TableStyles subfolder in the Content Explorer, open the table stylesheet.
2. Set the properties to be used for the online output.
   a. In the local toolbar of the Table Style Editor, do one of the following:
      - In the **Medium** field, make sure **Medium: (default)** is selected.

        OR
      - Click the down arrow in the **Medium** field and select **Medium: non-print**.
   b. Use the various tabs in the editor to set properties for that medium.
3. Set the properties to be used for the printed output as follows:
   a. In the local toolbar of the Table Style Editor, click the down arrow in the **Medium** field and select **Medium: print** or **Medium: [name of print medium]**.
   b. Use the various tabs in the editor to set properties for that medium.
   c. Click to save your work.
4. Apply that table style to the appropriate tables throughout your project as follows:

   For more information see the online Help or the Flare *Styles Guide*.
5. Associate the online medium with your online target as follows:
   a. Open the target to be used for online output (based on either the DotNet Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, or WebHelp Plus format).
   b. In the Target Editor, select the **Advanced** tab.
   c. In the **Stylesheet Medium** section, select the medium that you used for online output (e.g., default, non-print).
6. Associate the print medium with your print target as follows:
   a. Open the target to be used for print output (based on either the Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, or XHTML format).
   b. In the Target Editor, select the **Advanced** tab.
   c. In the **Stylesheet Medium** section, select the medium that you used for printed output (e.g., print).
7. Select **File>Save>Save All** (if using ribbons), select **File>Save All** (if using menus), or press **CTRL+SHIFT+S**.

HOW TO CREATE A TABLE STYLE FOR PRINTED OUTPUT—TWO TABLE STYLESHEETS

1. Create one table stylesheet to be used for online output and another to be used for printed output.

   Tip: If you want both tables to share most of the same settings, you can create the online table stylesheet first, make a copy of it for the print version, and then edit the settings in the copy as necessary. You can easily do this by selecting the original table stylesheet in the Content Explorer (Resources\TableStyles subfolder), pressing **CTRL+C**, pressing **CTRL+V**, and renaming the copy to reflect your needs.

2. Insert a table into a topic or edit an existing table.
3. In the Insert Table dialog (if inserting a new table) or the Table Properties dialog (if editing an existing table), click **Table Style** and from the drop-down select the table style to be used for the online output.
4. Click the down arrow next to the **Create Table Style** button and select **Print Style**. Click **OK** in the small dialog that opens. The Select Table Style dialog opens.
5. From the list, select the table style to be used for the printed output.
6. Click **OK**.
7. In the Insert Table or Table Properties dialog, click **OK**.
8. Select **File>Save>Save All** (if using ribbons), select **File>Save All** (if using menus), or press **CTRL+SHIFT+S**.

Note: If you used print table styles in the past and want to remove them now in favor of the medium method, you can use an option in the Apply Table Style dialog in the Table Style Editor. When this option is enabled, print table styles will be removed from any tables updated by this dialog.

Creating Single-Source Images

If you are creating a project containing images and need to generate output for both online and printed output, chances are good that you require different image settings (e.g., file format, color depth, resolution) for those outputs. In the past, the easiest way to accomplish this task was to create one set of images for the online output and another set for the printed output. However, there is another alternative. If you have both MadCap Flare and MadCap Capture installed, you can single-source your images, producing only one set of images for all outputs. You can specify that the online images should have one group of settings, while the printed images have another group of settings.

EXAMPLE

Let's say you create a Flare project and you are using Capture to produce images for it. You want to generate two different outputs from that Flare project. Let's say the first output is an online Help system to be placed on a website, and the other output is a PDF document, which you will send to a printer. Right away, you have a dilemma when it comes to the DPI (dots per inch) setting for the images in your project. The typical DPI setting for images displayed in an Internet browser is usually somewhere between 72 and 96. The DPI is automatically set for online output when you capture the image, depending on the computer that you are using. However, the DPI setting for printed output often needs to be higher (say, 300 DPI). Therefore, when you edit the image in Capture, you use the Format tab in the Image Properties dialog to specify the image settings for the online output (you may elect not to change any of the default settings). For print-based output, you use the Flare Print tab to specify the image settings; in the DPI field, you may want to select 300. In Flare, you insert the Capture image. When you generate output for the website (e.g., WebHelp), Flare displays the image in the DPI used when you captured the image (e.g., 96 DPI). When you generate the PDF output from the project, Flare displays the same image in 300 DPI.

HOW TO CREATE A SINGLE-SOURCE IMAGE

This requires a combination of tasks in MadCap Capture, followed by tasks in Flare.

MADCAP CAPTURE TASKS

1. Capture the image. (You also have the option of initiating this step from Flare.)
2. In the Capture Editor, double-click on the image. The Image Properties dialog opens.
3. On the **Format** tab, enter the appropriate settings for image when it is displayed in online output. For more details about these settings, see Capture's online Help.
4. On the **Flare Print** tab, enter the appropriate settings for the image when it is used in outputs intended for printed distribution.

   Note: The Flare Print Format tab is displayed only if the image in question already exists in a MadCap Flare project.

5. Click **OK**.
6. Save the changes to the image.

MADCAP FLARE TASKS

7. After completing the MadCap Capture tasks above, insert the image into the appropriate topic(s).
8. Make sure you develop targets for online and printed outputs.
9. When you are finished with your project, build the targets.
10. View the output for the targets.

    In the output, notice that the images for online outputs (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) contain the online settings. Meanwhile, the images in the printed outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML) contain the printed settings.

Resizing Images

This feature is supported in all outputs.

You can resize images with various methods.

Following are the tasks you can perform.

- **Resize Locally Using Properties** You can resize an image locally by setting its height and width properties, including maximum or minimum height or width. This is similar to the styles method, except that the properties are set only for a specific image, not on a style that can be applied to many images. This method also lets you take advantage of single-sourcing, because there is one group of settings that can be used for online output and another for print-based output (based on the medium that you are using for the target—e.g., default, print, non-print). See the online Help.
- **Resize Locally Dragging the Icon** You can resize an image locally by clicking and dragging the icon in the lower-right corner of the image. When you use this feature, Flare automatically sets the new height and width on the image tag. See the online Help.
- **Reset Size** If you resize an image and then decide you want it to be its original size (even after you save your work), you can easily reset it. See the online Help.

HOW TO RESIZE IMAGES BY USING STYLES

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. Make sure the appropriate medium is selected. If you are not using stylesheet mediums for your different outputs or if you want all mediums to have the same settings, just leave the medium set to "default" and continue.

   Mediums can be used if you want to use one group of settings for online output types (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and another group of settings for print-based output types (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). For example, you might use the "default" medium for your online outputs and you might use the "print" medium for your print outputs.
3. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.
4. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Image Styles.
5. From the area below, select the **img** tag. If you created classes of the tag, you can expand the img style and select the class instead.

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   Let's say that you are creating a PDF manual that is 8 inches wide and you want to ensure that none of your largest images are wider than 6 inches. You can create a class of the <img> tag and name it "MaxWidth6Inches." For most of your images, you can use the parent <img> tag, but for the large ones, you can use the img.MaxWidth6Inches style class. The large images will automatically be resized if necessary so that they are no wider than 6 inches.
6. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
7. You can use the following steps to specify a precise width or height for the style. You can also specify a maximum or minimum width or height.

TO SET A PRECISE WIDTH AND/OR HEIGHT

a. In the **Properties** section, expand the **Box** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.

b. To the right of **height** and/or **width**, click the down arrow and complete the fields in the popup. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area. Click **OK** when you are finished.

TO SET THE MAXIMUM WIDTH AND/OR HEIGHT

If the original image is larger than the maximum width or height that is set, it will be reduced in size so that it is no greater than the maximum value. If the original image is smaller than the maximum width or height, it will not be resized.

a. In the **Properties** section, expand the **Unclassified** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.

b. To the right of **max-height** and/or **max-width**, click the down arrow and complete the fields in the popup. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area. Click **OK** when you are finished.

TO SET THE MINIMUM WIDTH AND/OR HEIGHT

If the original image is smaller than the minimum width or height that is set, it will be enlarged so that it reaches the minimum value. If the original image is larger than the minimum width or height, it will not be resized.

a. In the **Properties** section, expand the **Unclassified** group.The property name is shown in the left column. The right column is used for selecting and entering values for the property.

b. To the right of **min-height** and/or **min-width**, click the down arrow and complete the fields in the popup. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area. Click **OK** when finished.

8. Click to save your work.

To apply a particular style class to an image (after you create it in the Stylesheet Editor), simply right-click the image where it is inserted. Then from the menu, select **Style Class** and choose the appropriate style.

Condition Tags

Condition tags can be used to tell Flare which content is to be used for some outputs and which is to be used for other outputs. Flare provides you with two initial condition tags ("PrintOnly" and "ScreenOnly") that are ideal for this purpose. However, if you want, you can always create additional condition tags or rename the default tags provided to meet your needs.

When it comes to condition tags for print-based output, the following tasks are involved:

1. **Create Tags** See "Creating Condition Tags" on the following page.
2. **Apply to Content** See "Applying Condition Tags for Printed Output" on page 329.
3. **Associate with Targets** See "Associating Condition Tags with Your Print Target" on page 333.

Creating Condition Tags

Within a condition tag set, you can create as many condition tags as you need.

HOW TO CREATE A CONDITION TAG

1. Make sure the Project Organizer is open.
2. Double-click the **Conditional Text** folder. The folder opens, showing an initial condition tag set provided by Flare, as well as any condition tag sets that you have added to the project. A condition tag set can hold multiple condition tags.
3. Double-click a condition tag set to open it. The Condition Tag Set Editor opens. If it is a new condition tag set, two condition tags may already be provided for you—one called "PrintOnly" and another called "ScreenOnly." Each condition tag is associated with a color, making it easy to identify conditioned content in the Flare interface. By default, the PrintOnly tag is associated with the color red, and the ScreenOnly tag is associated with the color blue.
4. At this point, you can do a number of things, including the following.

   ADD A NEW TAG

   You can add as many tags as you want, depending on your needs.

   a. In the local toolbar of the Condition Tag Set Editor, click the **New item** button . A new row is added.
   b. Press **F2** on your keyboard.
   c. Replace the temporary tag name with a new one.

   RENAME AN EXISTING TAG

   Maybe you want to use the existing tags, but you want them to have different names to reflect your purposes. For example, you might rename the "PrintOnly" tag to "Beginner," and you might rename the "ScreenOnly" tag to "Advanced."

   a. Click the tag and press **F2** on your keyboard. The tag name is highlighted.
   b. Type a new tag name.
   c. Press **Enter** on your keyboard.

CHANGE THE COLOR OF A TAG

You can associate any color you want with a condition tag. The color is for your use only; end users will not see it in the output.

a. Click the **Background** drop-down arrow and select **Pick Color**. The Color Picker dialog opens.
b. Select a new color.
c. Click **OK**.

ADD COMMENTS TO A TAG

You can add internal comments to a condition tag to indicate the specific purpose of the tag. Comments will not be displayed in the output.

a. Click in the **Comment** cell of the tag.
b. Press **F2** on your keyboard.
c. Type comments for the tag.
d. Press **Enter** on your keyboard.

5. Click to save your work.

Applying Condition Tags for Printed Output

By applying condition tags to content, you can separate what is intended for printed output and what is not. That way, content intended for online output does not show up in your printed manuals, and content intended for print is left out of the online documentation.

Keep in mind that condition tags are not used only to separate online from print-based output. That's simply a very common use for condition tags. You could have 12 print-based targets and you might use condition tags in all of them so that they each have some unique content.

Applying Condition Tags

After you create your condition tags (or determine that you will use the tags provided by Flare, you need to apply them to the appropriate portions of content in your topics (e.g., text, blocks of content, tables). For example, the content to be included only in the printed output could be assigned a "PrintOnly" condition tag, the content to be included only in the online output could be assigned a "ScreenOnly" condition tag, and the content to be included in both outputs would be left alone. For more information see the online Help or the *Condition Tags Guide*.

Using Condition Tags to Unbind Hyperlinks

In addition to applying condition tags to various content in your project, you may want to use them to unbind hyperlinks from the printed output, displaying the text only.

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Let's say you are creating both online and printed output from your project. You might have some content where you have inserted hyperlinks, and you might want this content to be included in both the online and printed output. However, let's say that a particular hyperlink connects to another topic that you are not including in the printed output. When you generate the online output, everything is fine. But when you generate the printed output, an error is displayed in the log because Flare cannot find the topic referenced in the hyperlink. The way to avoid seeing the error (and to avoid users experiencing a broken link in the output) is to apply a condition tag (e.g., "OnlineOnly") to the hyperlink and select the option in the Condition Tags dialog to unbind the link. If you then exclude that condition tag from your print target, you will still see the hyperlink text in the printed output, but the link will be removed. Therefore, you will no longer receive an error and the link will not be broken.

HOW TO USE A CONDITION TAG TO UNBIND A HYPERLINK

1. Open the content file (e.g., topic, snippet).
2. Make sure the span bars are visible at the top of the XML Editor. If they are not, click in the local toolbar at the bottom of the editor to show them.
3. Right-click on the span bar above the topic that corresponds with the link.

   Note: If you first click on the link in the topic, the corresponding span bar is highlighted above. For hypertext links, the span bar is labeled "a." For cross-references, the span bar is labeled "MadCap:xref."

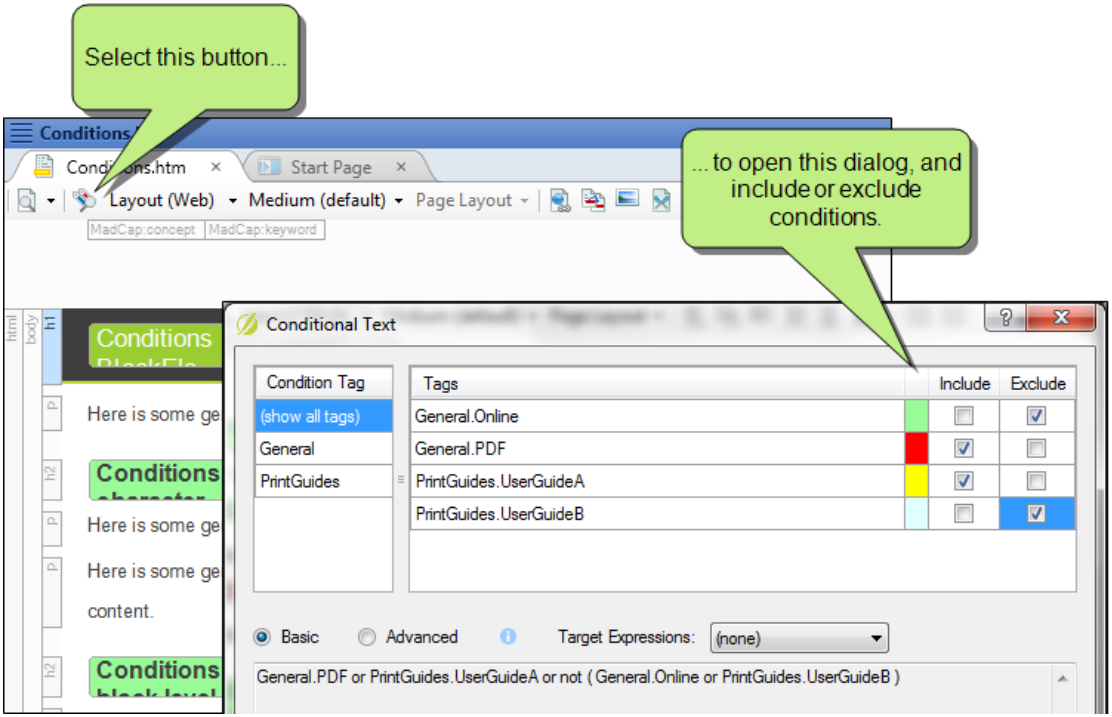
4. In the context menu, select **Conditions**. The Condition Tags dialog opens, with the first condition tag set selected and the associated condition tags shown on the right.
5. If you want to see condition tags for a different condition tag set, select it.
6. Click the check box next to the tags where you want the hyperlink to remain. A check mark appears in the box.
7. In the **Exclude Action** section, select **Unbind**.

   In other words, you are telling Flare this: Keep the hyperlink in the targets that are associated with the tags that I selected. For the targets not associated with those tags, get rid of the hyperlink, but do not remove the text.

   On the other hand, if you had selected the "Remove" option, you would have been telling Flare this: Keep the hyperlink in the targets that are associated with the tags that I selected. For the targets not associated with those tags, remove both the hyperlink *and* the text.
8. Click **OK**.
9. Click to save your work.

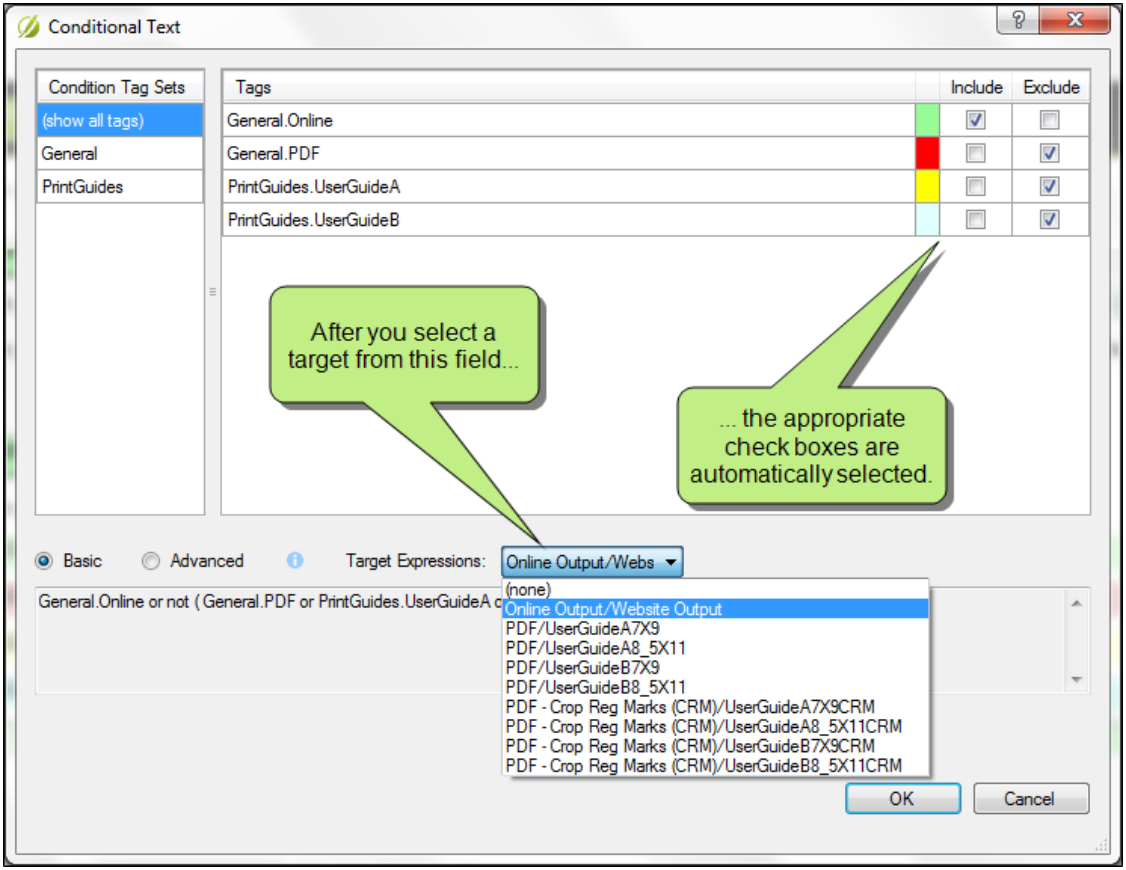
Associating Condition Tags to a File While Editing

When editing a document in the XML Editor, you can click in the local toolbar to open the Conditional Text dialog and include and exclude conditions on that file. This is similar to the feature that you can use to preview a document with certain conditions set. The difference is that this associates the conditions to the document as you edit it in the XML Editor.



Please note that this is not the same as *applying conditions* to actual content. Nor does this feature affect the output, as do the settings in the Target Editor. Rather, this functions more like a preview feature. It simply lets you temporarily remove from view content that is associated with certain condition tags so that you can see how the file looks without that content.

Usually when editing, you want to see the file as it is intended for a particular target. Therefore, although you can manually select conditions to include or exclude from view, the best approach is usually to click the **Target Expressions** drop-down and choose a target. The condition settings from that target are then replicated in this dialog, thus saving you time and effort.



Note: If you associate conditions with a file while editing and then open the Send Files For Review Wizard, those settings are preserved. Therefore, you can quickly send the file to a reviewer and that person will initially only see content with conditions that you have included.

Associating Condition Tags with Your Print Target

After you apply the condition tags to the appropriate content for print-based output, you'll need to specify in a target (based on one of the print-based output types) which condition tags to include in the output and which to exclude.

HOW TO ASSOCIATE CONDITION TAGS WITH YOUR PRINT TARGET

1. Open the target that you plan to build for your printed output. The Target Editor opens.
2. Click the **Conditional Text** tab.
3. In the **Condition Tag Sets** area, you can choose to view tags for all condition tag sets or you can select a specific set. The tags associated with the selected set are shown to the right, with their associated colors. An Include and Exclude check box appears next to each condition tag.
4. By default, all tags will be included in the target unless you specify otherwise. If you want to exclude a condition tag from the output for this target, click the **Exclude** check box next to it. If you want to make sure a condition tag is included in the output for this target, click the **Include** check box next to it.

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   If you use the default condition tags provided by Flare, you would click the Include check box next to the Default.PrintOnly tag, and you would click the Exclude check box next to the Default.ScreenOnly tag.

5. Click to save your work.

CHAPTER 6

Page Layouts or Master Pages

For print-based output, there are two ways to set the configuration (e.g., page size, margins, headers, footers) for pages in the output: page layouts and master pages. Page layouts are newer and are recommended over master pages. One reason for this is that page layouts are easier to use. Another reason is that page layouts can be used with any of the print-based output types (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML), whereas master pages can be used only for Microsoft Word or Adobe FrameMaker targets.

This chapter discusses the following:

Page Layouts 336

Master Pages 510

Page Layouts

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

A page layout is an element that you can create in your project in order to determine page specifications (e.g., size, margins) and to apply certain content (e.g., headers, footers, page numbers) to many (or all) topics in print-based output.It allows for easy configuration through the use of content frames, bleeds, crop marks, registration marks, margins, padding, alignment features, and more. Page layouts are similar to master pages, but are more flexible and easier to use. The general rule of thumb is that page layouts are recommended for *print-based output* (when possible), and master pages continue to be the best method for automatically adding headers, footers, and breadcrumbs in multiple topics for *online output*. Another difference between page layouts and master pages is that page layouts can be used for any of the print-based outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML), whereas master pages can be used only for Microsoft Word and FrameMaker when creating print-based output.

EXAMPLE—FRONT MATTER/CHAPTERS/INDEX

Let's say you are creating a manual that consists of front matter (e.g., title page, copyright page, and table of contents), 10 chapters, and an index. Perhaps you want all of the pages in the manual to measure 8 inches in height and 6 inches in width. Furthermore, you might want some pages (e.g., title and copyright pages) to contain no headers or footers, while you want the other parts of the manual to contain header text and page numbers at the bottom. In a situation such as this, you might create one page layout for your title and copyright pages, a second page layout for your TOC, a third page layout to be used by all of the chapters, and a fourth page layout to be used by the index. Each page layout might contain the same page size settings, but different page headers and footers.

Like all other files in Flare, a page layout is an XML file. It has an .flpgl extension. The traditional location to store a page layout in the Content Explorer is in the Resources\PageLayouts folder. However, you can store it anywhere in the Content Explorer that you like.

Page Types

Each page layout can consist of several pages. Why would you want more than one page? If you want different settings to be applied to the various pages in your final output—depending on their position in the document—you will want multiple pages. For each page in a page layout, you can designate one of the following types, which determines the behavior of the page. For details and graphics that show how page types work with other elements to create output that flows the way you want, see "Page Type Flow Scenarios" on page 379.

- **Title** Select this type if you want the settings to be applied to the first page in your output, which typically displays the manual title. If you include an Empty page type in your page layout, the title page in the output will be followed by the empty page. It is not mandatory that you use this page type for a title. Instead, you can use one of the other types, such as Normal.
- **First** Select this type for the first page of a new chapter. This page type can be used in a situation where you are creating a simple configuration and you are not concerned with left and right pages (e.g., a document for electronic distribution only). In most cases, a First page type would be followed by Normal pages.
- **First Left** Select this page type if you want chapters to begin on left-sided pages, and you need a different look for those pages than would be used for a regular left page.
- **First Right** Select this page type if you want chapters to begin on right-sided pages, and you need a different look for those pages than would be used for a regular right page.
- **Left** Select this type if you want the settings to be applied to a page in the output when it appears on a left (or even) page (e.g., page 42).
- **Right** Select this type if you want the settings to be applied to a page in the output when it appears on a right (or odd) page (e.g., page 43).
- **Normal** Select this type if you do not want a Left/Right type of page flow, but instead just want the same layout on every page, perhaps like a screenplay.
- **Empty** Select this type if you want the settings to be applied to an empty page in the output. You might use this page type after Title pages. Otherwise, you probably want to use the Empty Left and Empty Right page types instead. See "Using Empty Pages" on page 375.
- **Empty Left** Select this type if you also have a First Right page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the right side).
- **Empty Right** Select this type if you also have a First Left page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the left side).

Note: The empty page types are not supported in Microsoft Word output.

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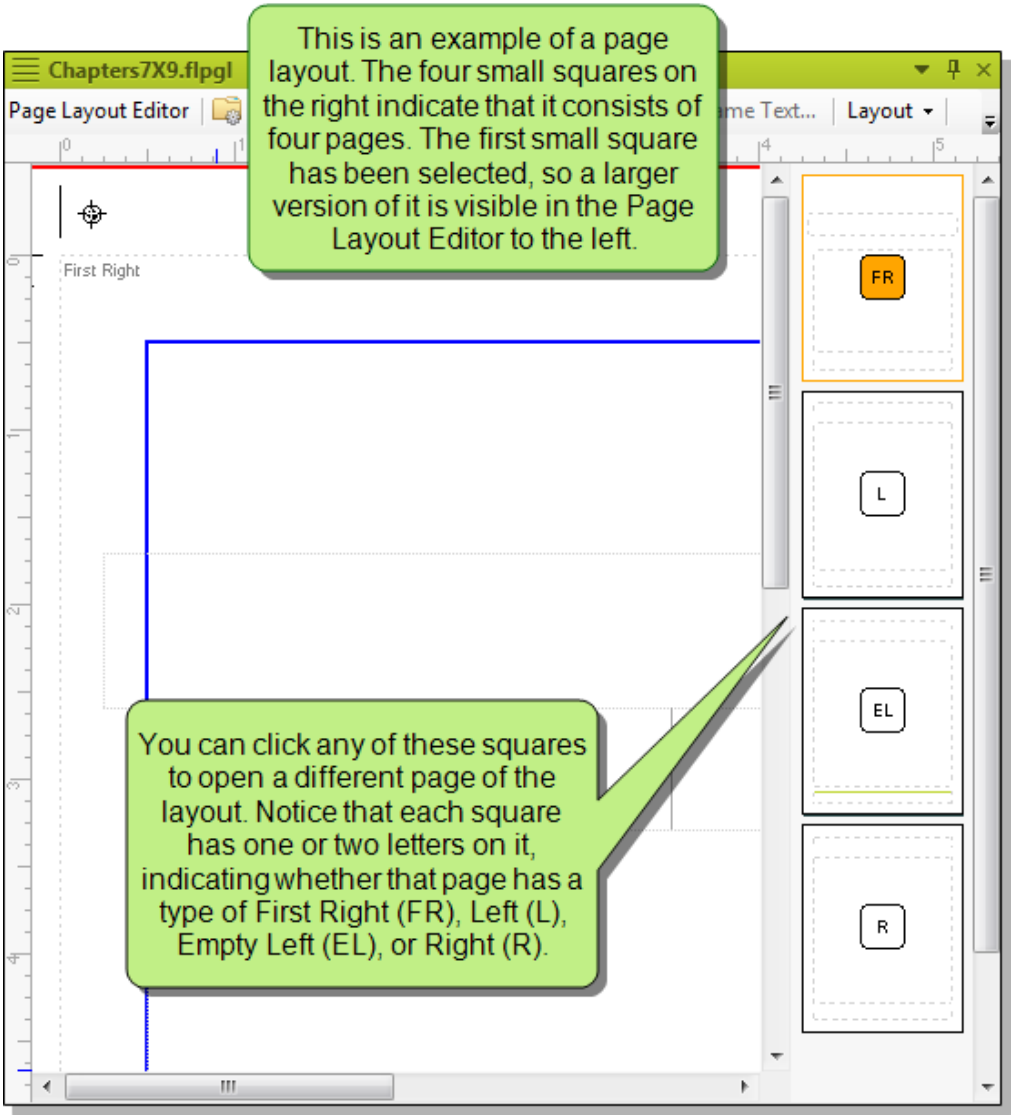
Let's say that you are creating a page layout to be used only for the title page that occurs at the very first page of your manual. In that case, your page layout might have one page that uses the Title page type. In addition, you can add an Empty page type to that layout. In the output, the Title page will automatically be followed by an empty page.

Now let's say that you are creating a second page layout to be used for the chapters in your document. Suppose that on the first page of each chapter, you do not want any header, but you want a page number at the bottom-right of the page. You also want each chapter to begin on a right page. Therefore, you create one page with a page type of First Right.

Next, suppose you want the pages that appear on the left side of the document to have the name of the manual in the upper-left corner and a page number in the lower-left corner. Therefore, you create another page with a page type of Left.

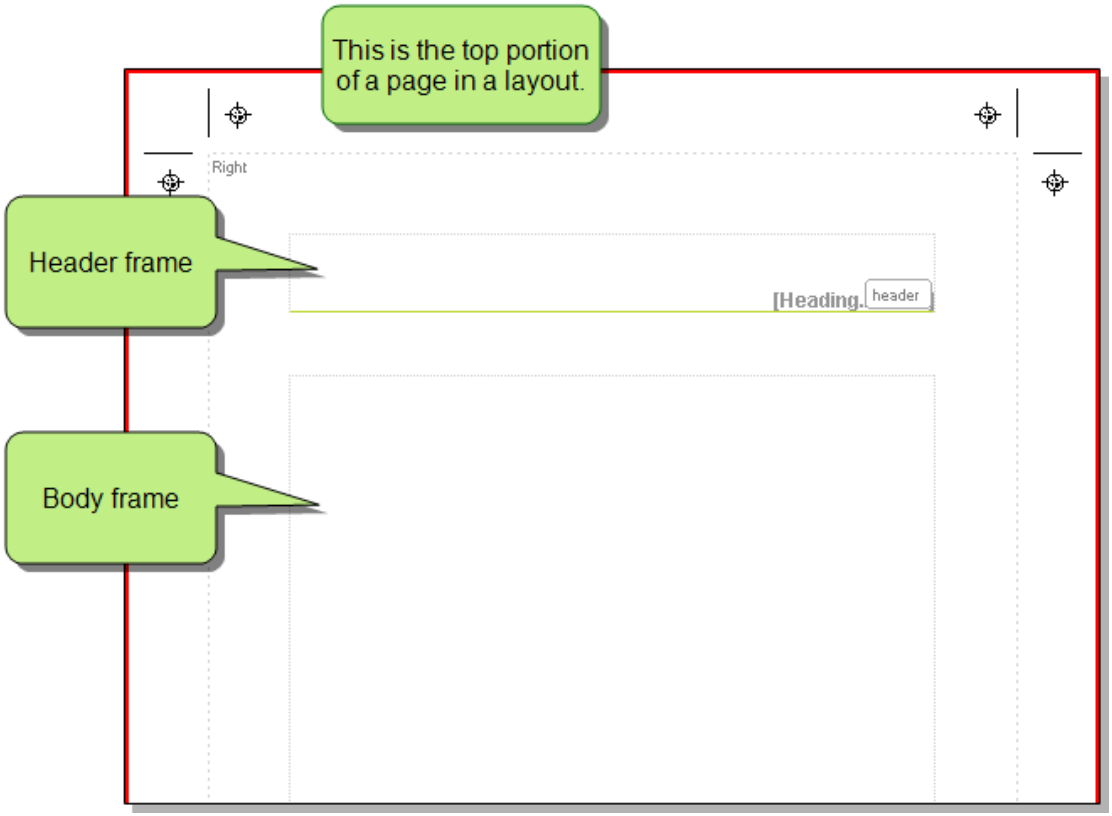
Perhaps you want the pages that appear on the right side of the document to have the chapter name of the manual in the upper-right corner and a page number in the lower-right corner. Therefore, you create another page with a page type of Right.

Finally, in order to ensure that the first page of each chapter starts on the right side of the manual, you create a fourth page with a page type of Empty Left. This allows an empty page to be forced (if necessary) on the left side immediately before the beginning of the next chapter.


Chapters7X9.flpgl
Page Layout Editor
Layout
This is an example of a page layout. The four small squares on the right indicate that it consists of four pages. The first small square has been selected, so a larger version of it is visible in the Page Layout Editor to the left.
First Right
FR
L
EL
R
You can click any of these squares to open a different page of the layout. Notice that each square has one or two letters on it, indicating whether that page has a type of First Right (FR), Left (L), Empty Left (EL), or Right (R).

Frames

Each page in a layout can contain multiple frames, which are used to hold content (such as page numbers and chapter titles) and determine where that content is positioned. When you add a new page, make sure the page contains at least a body frame (unless that page is using one of the empty page types). By default, certain frames may already be included in a page, depending on the template you select when adding a page layout. Frames are typically displayed as large, clear rectangles or squares on a page.



» **Body Frame** This frame, usually the largest on the page, is basically a placeholder for the content that you add to topics. You cannot add content directly to a body frame. If necessary, you can have multiple body frames on a page. This lets you customize the flow of text from one frame to another on a page.

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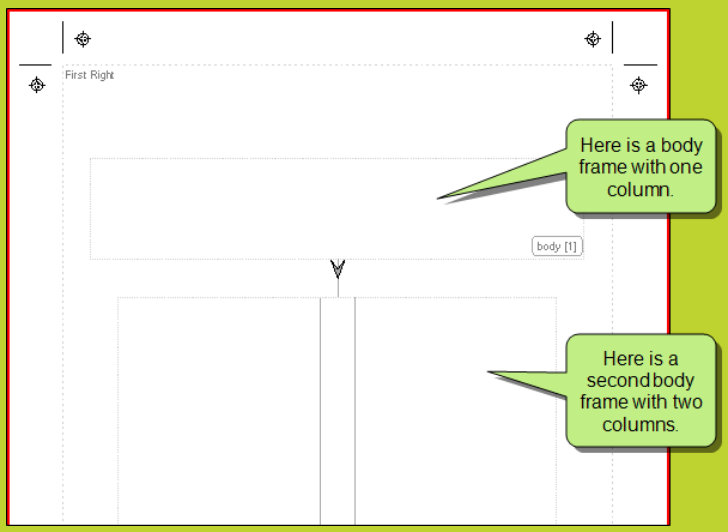
Let's say you want the body text be displayed in one column on the top quarter of each page, but then you want the text to continue below in two columns. In order to accomplish this, you can create two body frames on a page—one with a single column and the other with two columns.



» **Header Frame** This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the top of a page, above the body text.

» **Footer Frame** This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the bottom of a page, below the body text.

» **Decoration Frame** This frame can be used to display content for aesthetic purposes on a page. You can add color, a border, text, and images to a decoration frame.

> **Note:** Decoration frames are not supported in Microsoft Word or Adobe FrameMaker output.

» **Image Frame** This frame opens the Insert Image dialog, prompting you to provide an image file. The image is added to a frame of the same size, which you can place on the page as necessary. If you do not want to use an image frame, you can use a decoration frame instead to display a picture.

> **Note:** Image frames are not supported in Microsoft Word or Adobe FrameMaker output.

To position frames on a page, you can simply click on the edge and drag to resize. You can also click in the middle of a frame and drag to move it. In addition, there are various options available from the Layout drop-down button for aligning and positioning frames, as well as for rotating text within a frame.

Page Layout Templates

When you add a new page layout to your project, you select a page layout template as the basis for the new layout. Flare lets you choose from various factory templates, each of which is useful for different circumstances. After adding a new page layout based on a template, you are free to change it in any way you see fit. See "Adding Page Layouts" on page 348 and "Editing Pages and Frames" on page 358.

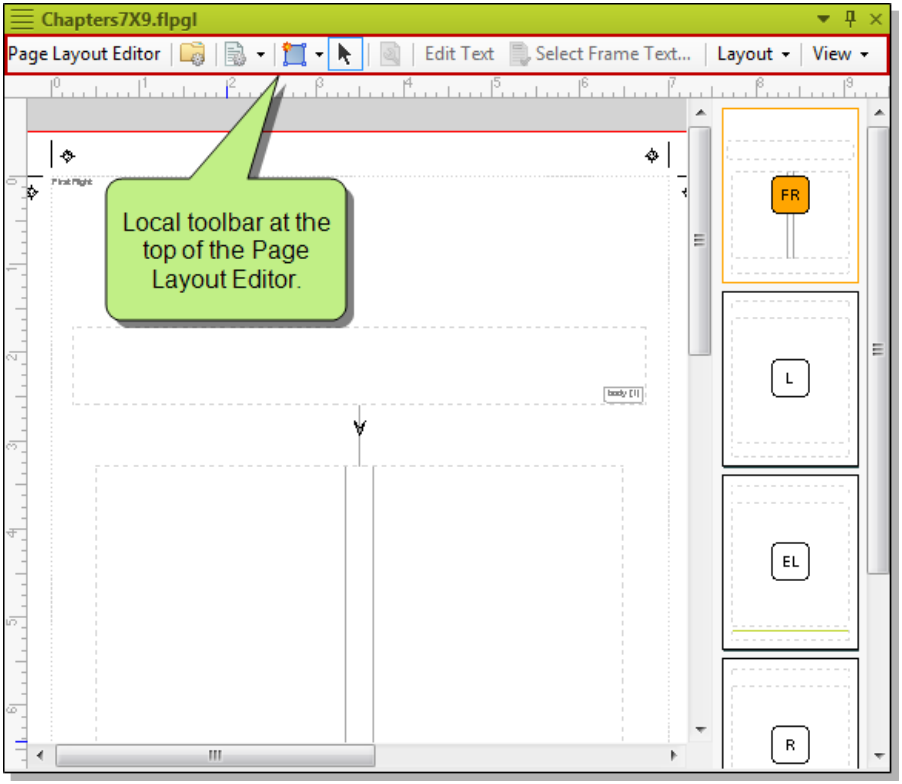
The Default Page Layout

You might notice a page layout in your project called "Default." This is a very basic page layout provided by Flare when you first create a project, depending on the template you select. Most people want to create their own page layouts, but if you don't, this page layout will be used instead.

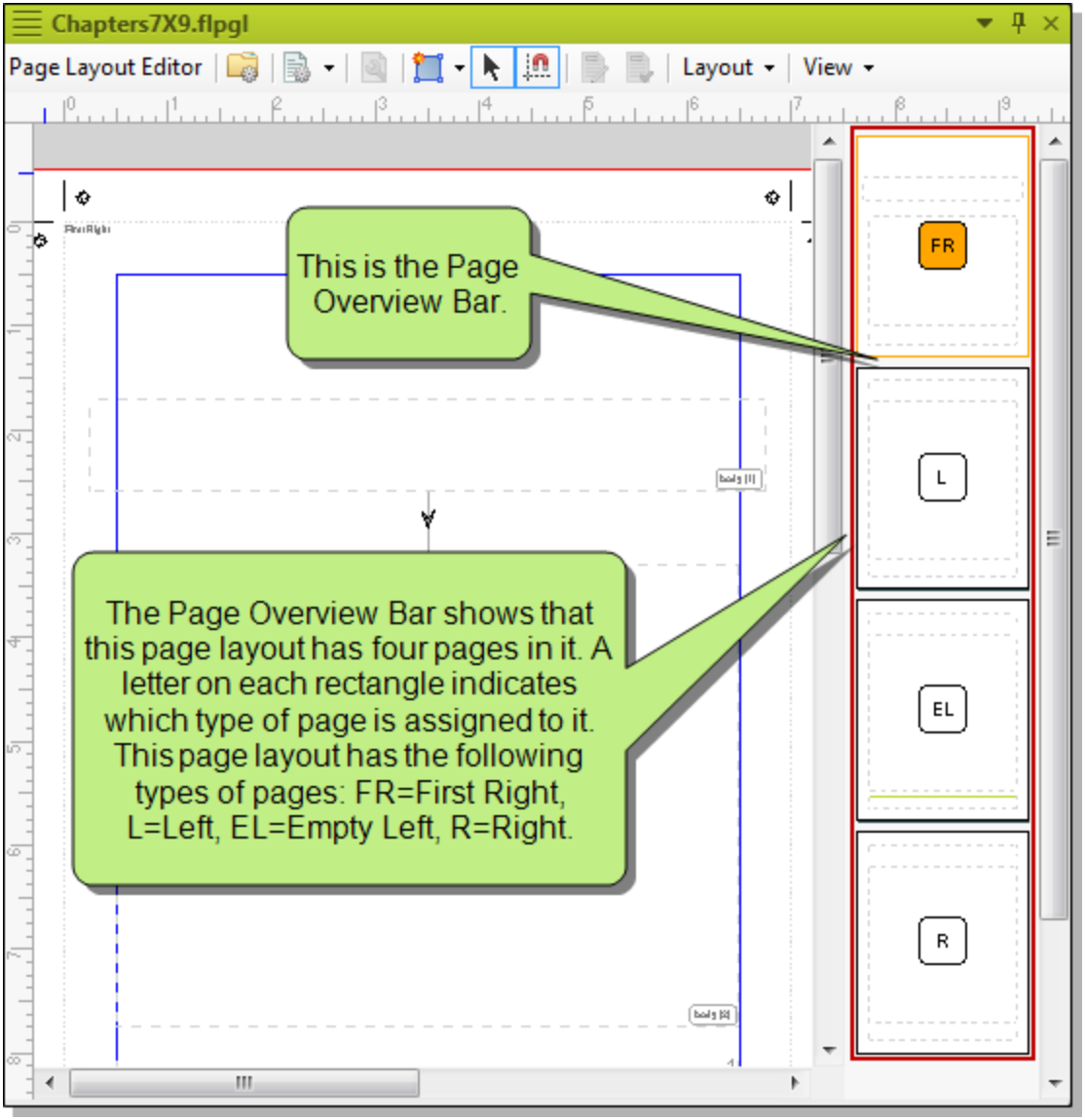
The Page Layout Editor

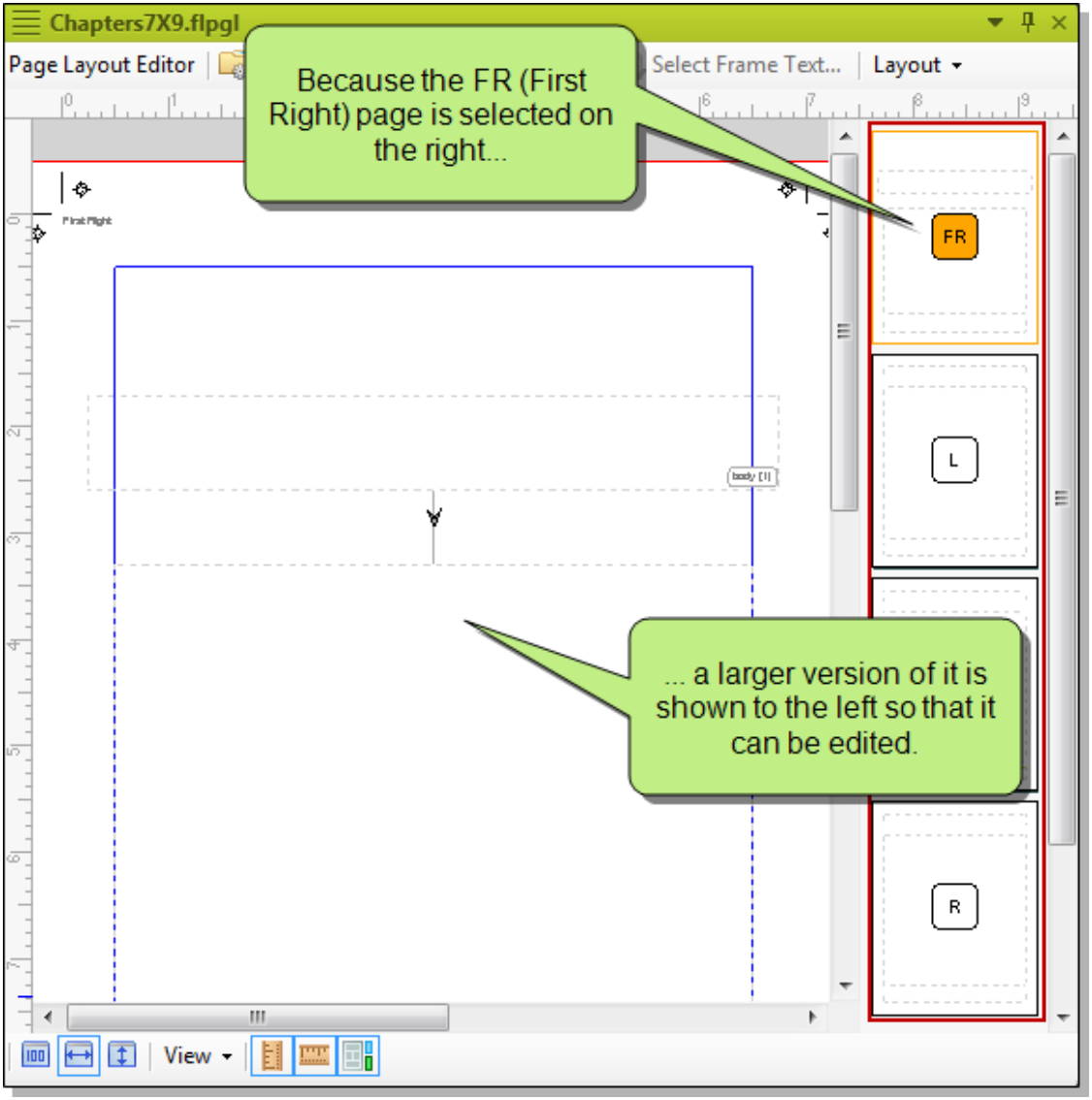
When you create and work on a page layout, you use the Page Layout Editor. This editor contains a few specific areas that let you do your work.

At the top of the editor is the local toolbar, with options that let you perform tasks such as creating new pages and frames, access properties for pages and frames, adjust the layout of frames, and show the bleed, crop marks, registration marks, margins, and padding.



On the right side of the editor are small rectangles that represent each page that has been added to the page layout. When you click on one of these small rectangles a larger version of that page is shown to the left. This large area is where you draw and adjust frames.


Chapters7X9.flpgl
Page Layout Editor
Layout
View
This is the Page Overview Bar.
The Page Overview Bar shows that this page layout has four pages in it. A letter on each rectangle indicates which type of page is assigned to it. This page layout has the following types of pages: FR=First Right, L=Left, EL=Empty Left, R=Right.
FR
L
EL
R


Chapters7X9.flpgl
Page Layout Editor
Select Frame Text...
Layout
Because the FR (First Right) page is selected on the right...
FR
L
... a larger version of it is shown to the left so that it can be edited.
R
View

Page Layouts in the XML Editor

There are two views to choose from in the XML Editor when you edit topics and snippets—Web Layout mode and Print Layout mode. The Print Layout mode lets you see how the pages will look with a page layout applied to it. In other words, it lets you see how the page will look when you generate print-based output. This means that you will be able to view the actual page size and orientation, as well as the margins and any header or footer content. You can toggle between the two views in the XML Editor by clicking the **Layout** button: Layout (Web) or Layout (Print) . See "About Layout Modes" on page 22.

If you are viewing content using the Print Layout in the XML Editor, you can use another drop-down in the local toolbar to choose a specific page layout. See "Selecting a Page Layout to View Content in the XML Editor" on page 495.

Steps for Using Page Layouts

Following are the main steps necessary for creating and using page layouts.

1. **Add Page Layout** After determining the number of page layouts that are needed to produce the kind of output you want, you can add the page layout files to the project. The best course of action is usually to use the factory templates provided by Flare and edit them as necessary. Another approach is to make copies of finished page layouts. After you configure a page layout as needed (adding pages, frames, page size settings, content), you can copy that page layout to create the additional ones that you need. That way, much of the work may already be completed in the subsequent page layouts, with only some tweaking necessary. See "Adding Page Layouts" on page 348 and "Copying and Renaming Page Layouts" on page 354.
2. **Add Pages** In each page layout, you need to decide how many pages you need and add them to the layout. The number of pages that you add depends on the differences that may occur on the various pages. For example, you might add a First Right page to be used only for the first page of the chapter. You also might add a Left page for even pages (e.g., 12, 14, 16, 18) and a Right page for odd pages (e.g., 11, 13, 15, 17). Each of those page types might display header or footer content differently. You also might want to add an Empty Left page to make sure that new chapters start on a right page. In the Page Layout Editor, only one page will be visible at any one time, but you can navigate to the other pages quickly by using the small squares to the right of the editor (one for each page in the page layout). See "Adding Pages" on page 355.
3. **Add or remove frames** You can add more frames or remove existing frames as necessary. See "Adding Page Layout Frames" on page 356 and "Removing Page Layout Frames" on page 444.
4. **Edit Pages and Frames** After you have the pages and frames that you need in a page layout, you can modify them to affect the content, as well as the look of the pages in the output. This might consist of various tasks, such as inserting page numbers or text, adding borders to frames, resizing frames, and more. See "Editing Pages and Frames" on page 358.
5. **Specify Chapter and Page Layout Breaks** After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that

target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time.

- **Associate Page Layout With Outline TOC Entry (Most Common Method)** If you want different parts of a manual to use different page layouts (e.g., one layout for the front matter, another for chapters, another for the index), you would associate the appropriate page layouts with the outline TOC entries where you want those page layouts to start. See "Specifying Chapter and Page Layout Breaks" on page 542. Also see "Creating an Outline TOC" on page 533.

  OR

- **Associate Page Layout With Target and/or Project** If you want a page layout to be applied to all topics in the output or project, you would associate that page layout with the target that you are building or with the entire project. See "Associating Master Page Layouts with Targets" on page 494 and "Associating Master Page Layouts with Projects" on page 493.

Note: There is an order of precedence with the three levels where you can specify a page layout. Specific entries in an outline TOC have the highest precedence, followed by page layouts at the target level, followed by page layouts at the project level. So if you've got a page layout set at the project or target level and it doesn't seem to be working the way you think it should, you might check to see if you have any page layouts set on specific TOC entries that are overriding the target- or project-level setting.

Note: In order to apply styles to content that you add in a page layout, you need to apply a master stylesheet at either the target or project level. Stylesheets cannot be applied to individual page layouts (as they can with topics). For more information see the online Help or the Flare *Styles Guide*.

Adding Page Layouts

You can add as many page layouts to a project as you need for generating print-based output. If you want to create a manual where the page headers and footers, orientation, page size, and margins are different for various parts of the manual, you will need multiple page layouts. If the page header and footer content, as well as the configuration, are the same for all pages in the manual, you only need one page layout.

HOW TO ADD A PAGE LAYOUT

1. Do one of the following, depending on the part of the user interface you are using:
   - **(Recommended) Right-Click** In the Content Explorer, right-click on a folder and from the context menu select **New>Page Layout**.

     > **Tip:** When adding a new file to the Content Explorer, the recommended method is to right-click on the folder in the Content Explorer and use the New menu option. This is the most efficient way to direct the new file to the folder where you want to store it. That's because the Add File dialog opens when you add a new content file, and this method ensures that the folder you want is already selected in that dialog.

   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Page Layout**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.

   - **Menu** Select **Project>Add Page Layout**.

   The Add File dialog opens.

2. In the **File Type** field at the top, make sure **Page Layout** is selected.

3. In the **Source** area select one of the following:

   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

   - **New from existing** This lets you 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 the browse button ..., use the Open File dialog to find a file, and double-click it.

   Following are the factory page layout templates provided by Flare. Many of these layouts already contain multiple page types. And many of the pages already contain content or variables in header or footer frames (e.g., page numbers, Chapter Number variables, Heading variables).

   - **ChapterA4** This template can be used for the main chapters in your manual. The pages in the template are already specified to use the international standard (ISO) A4 size (21 cm x 29.7 cm).
   - **ChapterLegal** This template can be used for the main chapters in your manual. The pages in the template are already specified to use the legal size (8.5 inches x 14 inches).
   - **ChapterLetter** This template can be used for the main chapters in your manual. The pages in the template are already specified to use the letter size (8.5 inches x 11 inches).
   - **ChapterResizable** This template can be used for the main chapters in your manual. The pages in the template are already initially specified to use the letter size (8.5 inches x 11 inches). However, you can easily resize the pages in this layout without having to also resize the frames within them.
   - **Default** This template is a very simple page layout consisting of only one Normal page, with a header frame, body frame, and footer frame. The page is already initially specified to use the letter size (8.5 inches x 11 inches).
   - **FrontMatterResizable** This template can be used for pages that precede the main chapters in your manual. For example, if you include a generated table of contents at the beginning of your manual, you might use this template to display those pages. The pages in the template are already initially specified to use the letter size (8.5 inches x 11 inches). However, you can easily resize the pages in this layout without having to also resize the frames within them.

- **GlossaryResizable** This template can be used for pages that hold a generated glossary. The pages in the template are already initially specified to use the letter size (8.5 inches x 11 inches). However, you can easily resize the pages in this layout without having to also resize the frames within them.
- **IndexResizable** This template can be used for pages that hold a generated index. The pages in the template are already initially specified to use the letter size (8.5 inches x 11 inches). However, you can easily resize the pages in this layout without having to also resize the frames within them.
- **NormalResizable** This template is a very simple page layout consisting of only one Normal page, with a header frame, body frame, and footer frame. The page is already initially specified to use the letter size (8.5 inches x 11 inches). However, you can easily resize the pages in this layout without having to also resize the frames within them.

Why are some templates called "Resizable"? It's not because only those page layouts contain pages that can be resized. You can resize the pages in any of these templates. The difference is that the resizable templates contain frames that have been anchored to the edges. This means that those frames maintain the same distance from the edges of the page if you choose to resize the page. The frames in other templates are not yet anchored (but they can be), which means that those frames will not automatically be resized if you decide to enlarge or reduce the page.

You can also create your own page layout templates, which can be used in the future when you create new page layouts. See .See the online Help for more information.

4. (Optional) The Folder field is automatically populated with the folder that has focus in the Content Explorer. If you want to place the file into a folder that you previously created in the Content Explorer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.

Note: If you want to place non-topic files in a traditional default folder, you must first make sure that folder exists in the Content Explorer. If it does not exist, you can easily add it.

Non-Topic File Type	Traditional Default Folder in Content Explorer
Image	Resources\Images
Master Page	Resources\MasterPages
Multimedia	Resources\Multimedia
Page Layout	Resources\PageLayouts

Non-Topic File Type	Traditional Default Folder in Content Explorer
Snippet	Resources\Snippets
Stylesheet	Resources\Stylesheets
Table Stylesheet	Resources\TableStyles

5. In the **File Name** field, type a new name for the page layout.
6. Click **Add**. The page layout is added to the Content Explorer. The Page Layout Editor opens to the right, displaying the page layout.

Importing Page Layouts

You can import individual page layout (FLPGL) files (such as those from another Flare project or those sent to you by a contributor).

HOW TO IMPORT A PAGE LAYOUT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Page Layout**.
   - **Menu** Select **Project>Add Page Layout**.

   The Add File dialog opens.
2. Select **New from existing** and click ...
3. In the Open dialog, navigate to the FLPGL file that you want to import. Then select it and click **Open**. The Source File field now contains the path to the file that you are importing. Also, the name of the file is displayed in the File Name field.
4. In the **File name** field, type a new name for the page layout.
5. Click **Add**. The page layout is added to the Resources\PageLayouts subfolder in the Content Explorer. The Page Layout Editor opens, displaying the page layout.

Opening Page Layouts

There are multiple ways to open page layouts that you have added to your project. You can open layouts from the Content Explorer or from an open topic associated with a page layout.

HOW TO OPEN A PAGE LAYOUT FROM THE CONTENT EXPLORER

1. Make sure the Content Explorer is open.
2. Expand the **Resources** folder, and double-click the **PageLayouts** subfolder to open it (unless you have stored these files in a custom folder).
3. Do one of the following:
   - Locate and double-click the page layout file (e.g., NameOfPageLayout.flpgl) that you want to open.

     OR
   - Locate and click the page layout file (e.g., NameOfPageLayout.flpgl) that you want to open. In the local toolbar, click .

   The page layout opens in the Page Layout Editor.

HOW TO OPEN A PAGE LAYOUT FROM AN OPEN TOPIC

1. Open a topic.
2. In the XML Editor, make sure you are working in Print Layout mode. In the local toolbar, if Layout (Web) is displaying, click the button. This changes the button display to Layout (Print), which means the topic is shown in Print Layout mode. See "About Layout Modes" on page 22.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Menu** Select **Tools>Edit Page Layout Document**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.
   - **XML Editor** Double-click on the margin of the page (i.e., not on a frame). Alternatively, you can right-click on the margin of the page (i.e., not on a frame). Then in the menu, select **Edit Page Layout Document**.

   The page layout opens in the Page Layout Editor.

Copying and Renaming Page Layouts

After determining the number of page layouts that are needed to produce the kind of output you want, you can add the page layout files to the project. The best course of action is usually to use the factory templates provided by Flare and edit them as necessary. Another approach is to make copies of finished page layouts. After you configure a page layout as needed (adding pages, frames, page size settings, content), you can copy that page layout to create the additional ones that you need. That way, much of the work may already be completed in the subsequent page layouts, with only some tweaking necessary.

HOW TO COPY AND RENAME A PAGE LAYOUT

1. Make sure the Content Explorer is open.
2. Expand the **Resources** folder, and double-click the **PageLayouts** subfolder (unless you have stored these files in a custom folder).
3. Click on the page layout that you want to copy.
4. Press **CTRL+C** on your keyboard.
5. Press **CTRL+V** on your keyboard. Another page layout is added, with the same name and the words "Copy of" before it. The settings in that page layout are identical to the settings of the page layout that you copied.
6. Click once on the new page layout name, so that the main name is highlighted but the file extension is not.
7. Type a new name for the page layout and press **Enter**.

Adding Pages

In each page layout, you need to decide how many pages you need and add them to the layout. The number of pages that you add depends on the differences that may occur on the various pages. For example, you might add a First Right page to be used only for the first page of the chapter. You also might add a Left page for even pages (e.g., 12, 14, 16, 18) and a Right page for odd pages (e.g., 11, 13, 15, 17). Each of those page types might display header or footer content differently. You also might want to add an Empty Left page to make sure that new chapters start on a right page. In the Page Layout Editor, only one page will be visible at any one time, but you can navigate to the other pages quickly by using the small squares to the right of the editor (one for each page in the page layout).

Using the **Page Properties** drop-down button in the local toolbar of the Page Layout Editor, you can add a new page to a layout in any of the following ways:

- **Duplicate or Copy a Page** Use one of these methods if you have already created and configured a page and want the new page to share some of the same settings. After the new page is created (which is exactly like the original page, except for the page name), you can change any of the frame content or other settings as needed. The only difference between the duplicate and copy method is that duplicating a page requires one less step.
- **Insert a Page** Use this method if you want to add a new page that initially is completely blank. After inserting a page, it takes on the size and margins of the previous page in the layout. However, you must add frames, content, and other settings to the new page as needed (unless you want to use it as a completely blank "empty page").
- **Mirror a Page** Use this method if you have already created and configured a page and want the new page to share the same settings, with the page setup "mirrored" (i.e., the left and right margin settings will be reversed). For example, if the left margin on the original page is 1.5 inches and the right margin is .75 inches, the mirrored page will have a left margin of .75 inches and a right margin of 1.5 inches. This feature is typically used if you plan to create a Left page (for even pages) and a Right page (for odd pages). Most of the time, you would want a greater margin on the side of the page closest to any binding (to compensate for the extra space consumed by the binding).

Adding Page Layout Frames

Each page in a layout can contain multiple frames, which are used to hold content (such as page numbers and chapter titles) and determine where that content is positioned. When you add a new page, make sure the page contains at least a body frame (unless that page is using one of the empty page types). By default, certain frames may already be included in a page, depending on the template you select when adding a page layout. Frames are typically displayed as large, clear rectangles or squares on a page. You can add the following types of frames: Body, Header, Footer, Decoration, Image.

HOW TO ADD A PAGE LAYOUT FRAME

1. Open the page layout. The Page Layout Editor opens.
2. Open the page where you want to insert the frame.
3. In the local toolbar, click the **New Frame** button .
4. In the drop-down, select one of the following options.
   - **New Frame Mode** The first time you select this option, it will allow you to draw a body frame. The second time you select this option, it will allow you to draw a header frame. The third time, it will allow you to draw a footer frame. And the fourth time, it will allow you to draw a decoration frame.
   - **New Header Frame Mode** This option allows you to draw a header frame. This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the top of a page, above the body text.

     Note: You can have only one header frame per page.

   - **New Footer Frame Mode** This option allows you to draw a footer frame. This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the bottom of a page, below the body text.

     Note: You can have only one footer frame per page.

   - **New Body Frame Mode** This option allows you to draw a body frame. This frame, usually the largest on the page, is basically a placeholder for the content that you add to topics. You cannot add content directly to a body frame. If necessary, you can have multiple body frames on a page. This lets you customize the flow of text from one frame to another on a page.

» **New Decoration Frame Mode** This option allows you to draw a decoration frame. This frame can be used to display content for aesthetic purposes on a page. You can add color, a border, text, and images to a decoration frame.

> **Note:** Decoration frames are not supported in Microsoft Word or Adobe FrameMaker output.

» **New Image Frame** This option allows you to draw an image frame. This frame opens the Insert Image dialog, prompting you to provide an image file. The image is added to a frame of the same size, which you can place on the page as necessary. If you do not want to use an image frame, you can use a decoration frame instead to display a picture.

> **Note:** Image frames are not supported in Microsoft Word or Adobe FrameMaker output.

5. Click on the page and drag the mouse to draw a rectangle or square. Release the mouse button when you are finished. (For image frames, you do not need to draw on the page; the frame is automatically added at the same size as the image.)

   If you have drawn two frames of the same type on a page (e.g., two body frames) an arrow connects the frames, showing the direction that content flows from one frame to the other. If you right-click on a frame, you can choose **Select Next Frame** to activate the next frame in the flow.

   The frame is added, with a label that indicates the type of frame.

6. Click to save your work.

Editing Pages and Frames

After you have the pages and frames that you need in a page layout, you can modify them to affect the content, as well as the look of the pages in the output. Following are some of the main tasks involved in editing pages and frames.

Page Editing Tasks

- **Margins** You can set the margins for a page, which determines the amount of space to the left, right, top, or bottom of the body content. See "Specifying Page Margins" on page 369.
- **Page Names** You can provide a name for each page that you create in a layout. This is an optional task, but might help you internally distinguish one page from another in a layout. See "Specifying Page Names" on page 370.
- **Size and Orientation** You can select a pre-set size for a page or create a custom size. You can also determine the orientation (portrait or landscape). See "Specifying Page Size and Orientation" on page 371.
- **Page Types** For each page in a layout that you create, you can assign a type to determine how that page behaves in the output. For example, if you want odd pages in the output to always display particular header content or look a certain way, you can create a page with the Right page type. See "Specifying Page Types" on page 372.
- **Background** You can add background settings to a page in a layout. This includes the ability to specify a color, an image, and a repeating pattern for the background image. Your settings will extend to your page margins. If you want the settings to extend to the edges of the page, you can set your page margins to 0. See "Specifying Page Background Settings" on page 374.
- **Empty Pages** If you need to force some pages in the output to be empty on purpose, you can use the "Empty" page type. For example, if Flare detects that you want a particular chapter to start on a right page, it will automatically insert an empty page before the beginning of the chapter, if necessary, to make sure the chapter begins on a right page. See "Using Empty Pages" on page 375.
- **Snap Frames** When you are resizing, moving, or creating a frame, you can snap its edges to other frames on the layout (i.e., when you move the frame close enough to another frame it "connects" to it). See "Using the Snap Feature in Page Layouts" on page 412.

Frame Editing Tasks

- **Aligning Frames** The Page Layout Editor contains various tools to help you easily keep your frames aligned with each other on a page. For example, after adding a decoration frame to a page, you might want to make sure that its left border is aligned with the left borders of the header and footer frames on the page. This feature is not available for body frames. See "Aligning Page Layout Frames" on page 423.
- **Aligning Text** You can easily align text and content in a frame both vertically and horizontally. See "Aligning Text in Frames" on page 425.
- **Anchors** You can set anchors in a frame. Anchors allow you to lock the frame to the margins on the page. If a page size changes, the frame is resized accordingly. See "Setting Frame Anchors" on page 448.
- **Background** You can add a color and/or image to the background of a frame. See "Specifying a Frame Background" on page 484.
- **Borders** You can add borders around a frame. This might be useful, for example, if you want a line to run across the bottom of the header on a page. For PDF, XPS, and XHTML outputs, you can also make the borders rounded by using border radius properties. See "Specifying Frame Borders" on page 485.
- **Breaks** For PDF, XPS, and XHTML outputs, you can apply breaks to page layout frames, similar to the way you can apply page breaks to content such as headings or paragraphs. You can also set frame breaks on tables. See "Setting Frame Breaks on Paragraphs and Headings" on page 458 and "Setting Page, Column, and Frame Breaks on Tables" on page 467.
- **Columns** You can easily add and configure columns in any frame of a page layout. See "Creating Columns" on page 427.
- **Floating and Sinking** You can arrange overlapping frames on a page to determine which ones are displayed "in front" of others. See "Floating and Sinking Frames" on page 429.
- **Frame Flow (Type)** Each frame that you add to a page has a specific type (Body, Header, Footer, Decoration, Image). The type determines how the frame behaves in the output and the flow of its content. For example, a Body frame will automatically display the content from your topics, whereas a Footer frame only displays the content that you add to it. See "Specifying Frame Flow" on page 487.
- **Padding** If you want there to be a certain amount of space between the edge of a frame and the content within it, you can set the padding. See "Specifying Frame Padding" on page 489.
- **Page Numbers** One type of content that you are likely to add to a frame is a page number, which is actually a snippet that serves as a placeholder for a page number in the output. See "Inserting Page Numbers into Frames" on page 442.
- **Removing Frames** Just as you can add new frames to a page as necessary, you can remove existing frames as well. See "Removing Page Layout Frames" on page 444.

- **Rotating Frames** From time to time, you may find that you need to rotate a frame on a page. For example, you might want to rotate a decoration frame so that the text reads sideways, as opposed to left-to-right. See "Rotating Frames" on page 445.
- **Size** You can easily set the size and position for a frame on a page, either by entering specific values in the Frame Properties dialog or by dragging the frame as needed. See "Specifying Frame Size" on page 490.
- **Text and Content—Add to Frames** You can add any kind of content to a frame that you can add to a regular topic (e.g., text, links, images). Simply by selecting a frame and pressing **F2**, you can open the Frame Contents window pane, which is used as a miniature XML Editor for adding content to a frame. See "Adding Text and Content to Frames" on page 411.
- **Variables** If you want certain content to be inserted into a frame automatically (rather than typing the text manually), you can use a variable. For example, you might want to automatically include the first <h1> heading of each chapter into the header for certain pages. By using a Heading variable, you can use just one page layout for all of your chapters, rather than having to create a new page layout for each chapter. For Adobe PDF, Microsoft XPS, and XHTML output, you can also use Heading variables to automatically display glossary headings, index headings, or index terms in a page layout frame. See "Chap/Sec/Vol Variables in Frames" on page 430, "Inserting Heading Variables Into Frames" on page 433, and "Inserting Running Head Variables into Frames" on page 440.

Duplicating Pages in Page Layouts

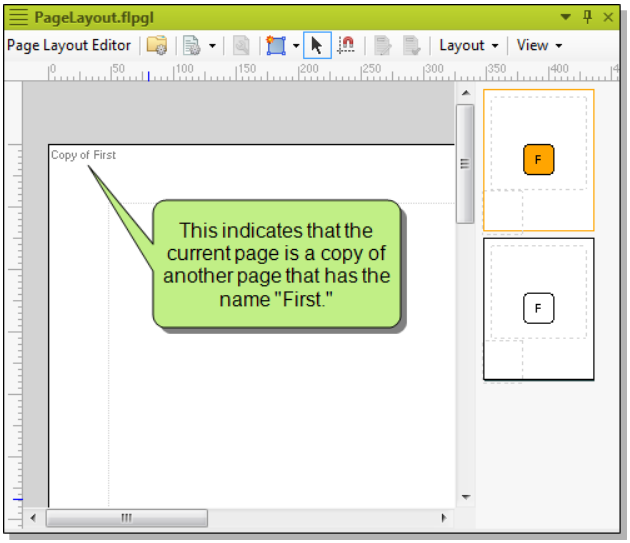
If you have already created and configured a page in a page layout and want to create a new page that shares some of the same settings, you can duplicate it. After the new page is created (which is exactly like the original page, except for the page name), you can change any of the frame content or other settings as needed.

HOW TO DUPLICATE A PAGE IN A PAGE LAYOUT

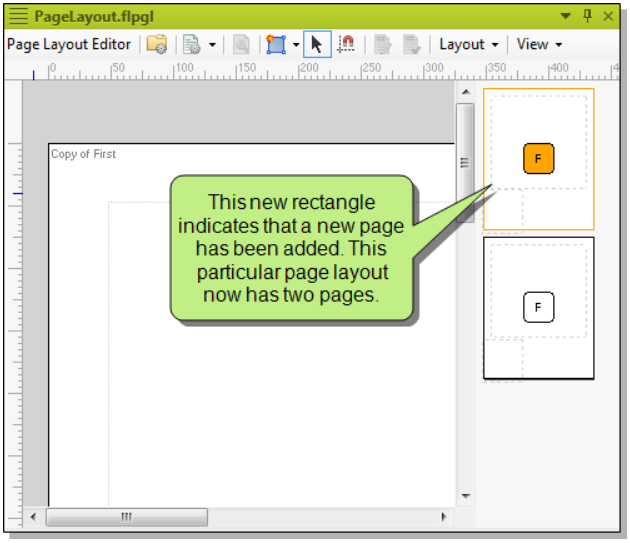
1. Open the page in the page layout that you want to copy.
2. In the local toolbar, click the down arrow next to the **Page Properties** button .
3. In the drop-down, select **Duplicate**.

   A copy of the page is added to the layout. This is indicated in a couple of ways.

   First, the new page displays the same page name as the source page (in the upper-left corner), with the words "Copy of" before it.



Second, a new small rectangle is added to the right of the Page Layout Editor, representing the new page.



4. Click to save your work.

Inserting Pages in Page Layouts

Use this method if you want to add a new page that initially is completely blank. After inserting a page, it takes on the size and margins of the previous page in the layout. However, you must add frames, content, and other settings to the new page as needed (unless you want to use it as a completely blank "empty page").

HOW TO INSERT A PAGE INTO A PAGE LAYOUT

1. Open the page layout. The Page Layout Editor opens.
2. In the local toolbar, click the down arrow next to the **Page Properties** button .
3. From the drop-down select **Add Page**, and from the menu select one of the following.
   - **Title** Select this type if you want the settings to be applied to the first page in your output, which typically displays the manual title. If you include an Empty page type in your page layout, the title page in the output will be followed by the empty page. It is not mandatory that you use this page type for a title. Instead, you can use one of the other types, such as Normal.
   - **First** Select this type for the first page of a new chapter. This page type can be used in a situation where you are creating a simple configuration and you are not concerned with left and right pages (e.g., a document for electronic distribution only). In most cases, a First page type would be followed by Normal pages.
   - **First Left** Select this page type if you want chapters to begin on left-sided pages, and you need a different look for those pages than would be used for a regular left page.
   - **First Right** Select this page type if you want chapters to begin on right-sided pages, and you need a different look for those pages than would be used for a regular right page.
   - **Left** Select this type if you want the settings to be applied to a page in the output when it appears on a left (or even) page (e.g., page 42).
   - **Right** Select this type if you want the settings to be applied to a page in the output when it appears on a right (or odd) page (e.g., page 43).
   - **Normal** Select this type if you do not want a Left/Right type of page flow, but instead just want the same layout on every page, perhaps like a screenplay.
   - **Empty** Select this type if you want the settings to be applied to an empty page in the output. You might use this page type after Title pages. Otherwise, you probably want to use the Empty Left and Empty Right page types instead. See "Using Empty Pages" on page 375.
   - **Empty Left** Select this type if you also have a First Right page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the right side).

» **Empty Right** Select this type if you also have a First Left page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the left side).

> **Note:** The empty page types are not supported in Microsoft Word output.

A new untitled page is added to the page layout. A small rectangle is added to the right of the page layout, which can be used to open the new page.

After adding a page to a layout, you can add frames to the pages and edit them. See "Adding Page Layout Frames" on page 356, and "Editing Pages and Frames" on page 358.

> **Warning:** Make sure you at least add a body frame to each new page that you create. Otherwise, your output will not work as you want it to.

Mirroring Pages in Page Layouts

There are various ways to add new pages to a page layout. Use this method if you have already created and configured a page and want the new page to share the same settings, with the page setup "mirrored" (i.e., the left and right margin settings will be reversed). For example, if the left margin on the original page is 1.5 inches and the right margin is .75 inches, the mirrored page will have a left margin of .75 inches and a right margin of 1.5 inches. This feature is typically used if you plan to create a Left page (for even pages) and a Right page (for odd pages). Most of the time, you would want a greater margin on the side of the page closest to any binding (to compensate for the extra space consumed by the binding).

HOW TO MIRROR A PAGE IN A PAGE LAYOUT

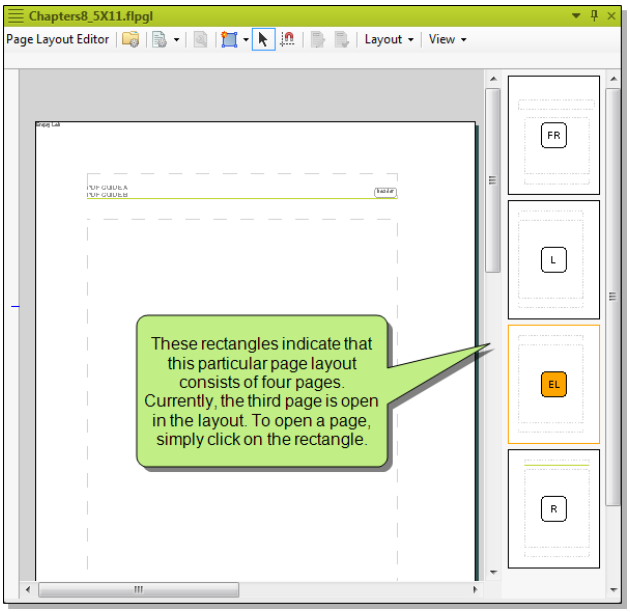
1. Open the page layout. The Page Layout Editor opens.
2. Open the page that you want to mirror. (You can click a small rectangle to the right of the layout to open its different pages.)
3. In the local toolbar, click the down arrow next to the **Page Properties** button .
4. From the drop-down select **Mirror Page**.A new page is added to the page layout. A small rectangle is added to the right of the page layout, which can be used to open the new page.

Opening Pages in Layouts

You can easily open individual pages that you have added to a page layout.

HOW TO OPEN A PAGE IN A LAYOUT

1. Open a page layout. The Page Layout Editor opens.
2. If you have multiple pages in the layout, select the page you want to work with. To do this, click the small rectangle to the right of the editor that represents the appropriate page. (If you do not see the rectangles, click the **View** menu at the top of the Page Layout Editor and select **Page Overview Bar**.)



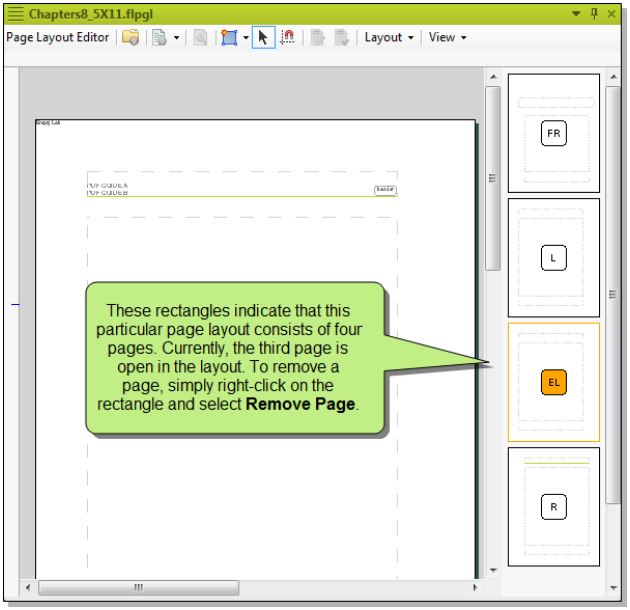
Tip: When you hover over a rectangle without clicking, a popup displays the name of the page, which helps you to identify it. After you open a page, the name of the page is displayed in the upper-left corner of the page.

Removing Pages from Page Layouts

You can easily remove individual pages that you have added to a page layout.

HOW TO REMOVE A PAGE IN A LAYOUT

1. Open a page layout. The Page Layout Editor opens.
2. Right-click on the small rectangle that represents the page you want to remove, and select **Remove Page**. (If you do not see the rectangles, click the **View** menu at the top of the Page Layout Editor and select **Page Overview Bar**.)



> **Tip:** When you hover over a rectangle without clicking, a popup displays the name of the page, which helps you to identify it.

3. Click to save your work.

Specifying the Page Bleed Size

The bleed is the area beyond the edge of the page where printing occurs. Professional printers use the bleed to prevent a final trimmed document from having unprinted areas along the edge of the document. You can set the size of the bleed in the Page Properties dialog.

HOW TO SPECIFY THE PAGE BLEED SIZE

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **Print Marks** tab.
4. (Optional) The current page in the layout is selected at the top in the Page field. You can use this field to select any of the other pages in the layout and your changes will be applied to that page. If you plan to make the same changes to all of the pages in the layout, select **<all>** from this drop-down. That way, you only need to specify your settings one time for all of the pages.
5. Use the **Bleeds** section to enter settings:
   - **Left** Enter the length of the left bleed area for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Right** Enter the length of the right bleed area for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Top** Enter the length of the top bleed area for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Bottom** Enter the length of the bottom bleed area for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
6. Click **OK**.
7. Click to save your work.

Specifying Page Margins

You can set the margins for a page, which determines the amount of space to the left, right, top, or bottom of the body content.

HOW TO SPECIFY THE MARGINS FOR A PAGE

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **General** tab.
4. (Optional) The current page in the layout is selected at the top in the Page field. You can use this field to select any of the other pages in the layout and your changes will be applied to that page. If you plan to make the same changes to all of the pages in the layout, select **<all>** from this drop-down. That way, you only need to specify your settings one time for all of the pages.
5. Use the **Page Margins** section to enter settings.
   - **Left** Enter the length of the left margin for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Right** Enter the length of the right margin for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Top** Enter the length of the top margin for the page. This is the space from the top of the body content to the top edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Bottom** Enter the length of the bottom margin for the page. This is the space from the bottom of the body content to the bottom edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
6. Click **OK**.
7. Click to save your work.

Specifying Page Names

You can provide a name for each page that you create in a layout. This is an optional task, but might help you internally distinguish one page from another in a layout.

HOW TO SPECIFY THE NAME FOR A PAGE

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **General** tab.
4. In the **Page Name** field, type a name for the page.
5. Click **OK**.
6. Click to save your work.

Specifying Page Size and Orientation

You can select a pre-set size for a page or create a custom size. You can also determine the orientation (portrait or landscape).

HOW TO SPECIFY THE SIZE AND ORIENTATION FOR A PAGE

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **General** tab.
4. (Optional) The current page in the layout is selected at the top in the Page field. You can use this field to select any of the other pages in the layout and your changes will be applied to that page. If you plan to make the same changes to all of the pages in the layout, select **<all>** from this drop-down. That way, you only need to specify your settings one time for all of the pages.
5. Use the **Page Size** section to enter settings.
   - **Page Size** Select a standard size for the page (e.g., Letter, Legal) or select **(custom)** to specify a non-standard width and height.
   - **Custom Width** If you selected "(custom)" from the Page Size field, enter a specific width for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Custom Height** If you selected "(custom)" from the Page Size field, enter a specific height for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Orientation** Select the orientation for the page. You can either select **Portrait** (if you want the pages to be taller than they are wide), or you can select **Landscape** (if you want the pages to be wider than they are tall).
6. Click **OK**.
7. Click to save your work.

Specifying Page Types

For each page in a layout that you create, you can assign a type to determine how that page behaves in the output. For example, if you want odd pages in the output to always display particular header content or look a certain way, you can create a page with the Right page type.

For details and graphics that show how page types work with other elements to create output that flows the way you want, see "Page Type Flow Scenarios" on page 379.

HOW TO SPECIFY A PAGE TYPE

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **General** tab.
4. Click in the **Page Type** field and select one of the following:
   - **Title** Select this type if you want the settings to be applied to the first page in your output, which typically displays the manual title. If you include an Empty page type in your page layout, the title page in the output will be followed by the empty page. It is not mandatory that you use this page type for a title. Instead, you can use one of the other types, such as Normal.
   - **First** Select this type for the first page of a new chapter. This page type can be used in a situation where you are creating a simple configuration and you are not concerned with left and right pages (e.g., a document for electronic distribution only). In most cases, a First page type would be followed by Normal pages.
   - **First Left** Select this page type if you want chapters to begin on left-sided pages, and you need a different look for those pages than would be used for a regular left page.
   - **First Right** Select this page type if you want chapters to begin on right-sided pages, and you need a different look for those pages than would be used for a regular right page.
   - **Left** Select this type if you want the settings to be applied to a page in the output when it appears on a left (or even) page (e.g., page 42).
   - **Right** Select this type if you want the settings to be applied to a page in the output when it appears on a right (or odd) page (e.g., page 43).
   - **Normal** Select this type if you do not want a Left/Right type of page flow, but instead just want the same layout on every page, perhaps like a screenplay.
   - **Empty** Select this type if you want the settings to be applied to an empty page in the output. You might use this page type after Title pages. Otherwise, you probably want to use the Empty Left and Empty Right page types instead. See "Using Empty Pages" on page 375.

- **Empty Left** Select this type if you also have a First Right page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the right side).
- **Empty Right** Select this type if you also have a First Left page type and need empty pages to be injected before them when necessary (i.e., to force a new chapter to begin on the left side).

> **Note:** The empty page types are not supported in Microsoft Word output.

5. Click **OK**.
6. Click to save your work.

CONTINUE L/R AND CONTINUE FL/FR

In addition to the page types already described, the following options have been added to the Properties dialog for TOC entries.

- **(continue L/R)** Select this option to specify a Left/Right page sequence, using whichever page comes next in the normal flow.
- **(continue FL/FR)** Select this option to continue the First Left/First Right page sequence, using whichever page comes next in the normal flow.

> **Note:** The page layout types as described work for left-to-right languages. For right-to-left languages, the way these page types work is flipped.

> **Note:** Unlike the other print-based outputs, Microsoft Word does not automatically use left and right pages after First Left and First Right page types. Instead, you must force chapter breaks and specify the page type on every topic in the outline TOC if you want different pages of the layout to be used.

Specifying Page Background Settings

You can add background settings to a page in a layout. This includes the ability to specify a color, an image, and a repeating pattern for the background image. Your settings will extend to your page margins. If you want the settings to extend to the edges of the page, you can set your page margins to 0.

HOW TO SPECIFY PAGE BACKGROUND SETTINGS

1. Open a page in a layout.
2. Double-click on the page (without double-clicking on a frame).
3. Select the **Background** tab.
4. (Optional) The current page in the layout is selected at the top in the Page field. You can use this field to select any of the other pages in the layout and your changes will be applied to that page. If you plan to make the same changes to all of the pages in the layout, select **<all>** from this drop-down. That way, you only need to specify your settings one time for all of the pages.
5. Use the tab to specify the settings that you want for the background.

   SET A COLOR FOR THE BACKGROUND

   - In the **Color** field, click the down arrow and select a color from the popup. For advanced color options, select **More Colors** and use the fields in the Color Picker dialog.

   ADD AN IMAGE TO THE BACKGROUND

   a. Next to the **Image** field, click the **Browse** button. The Insert Image dialog opens.

   b. Select an image file to insert. You can do this in one of the following ways.

      - Select an image already in the project by finding and selecting it in the built-in tree.

        OR

      - Click ... to find and select an image file outside of the project.

      Note: If you want to select an image file that you recently inserted somewhere in your project, click the down arrow in the field next to the Browse button and select the file from the list.

   c. Click **OK**.

   d. If you want the background image to repeat, select one of the options from the **Repeat** field. You can also set the image position horizontally and vertically by using the **X** and **Y** fields.
6. In the Properties dialog, click **OK**.
7. Click to save your work.

Using Empty Pages

This feature is supported in Adobe FrameMaker, Adobe PDF, Microsoft XPS, and XHTML output.

When creating print-based output, there may be times when you want a page in the document to purposely be left blank (or mostly blank). Flare lets you use three kinds of empty page types in a page layout. If you add one of these empty page types in a page layout, empty pages can automatically be injected into the output when necessary, based on the page types in your layout.

THE EMPTY PAGE TYPES

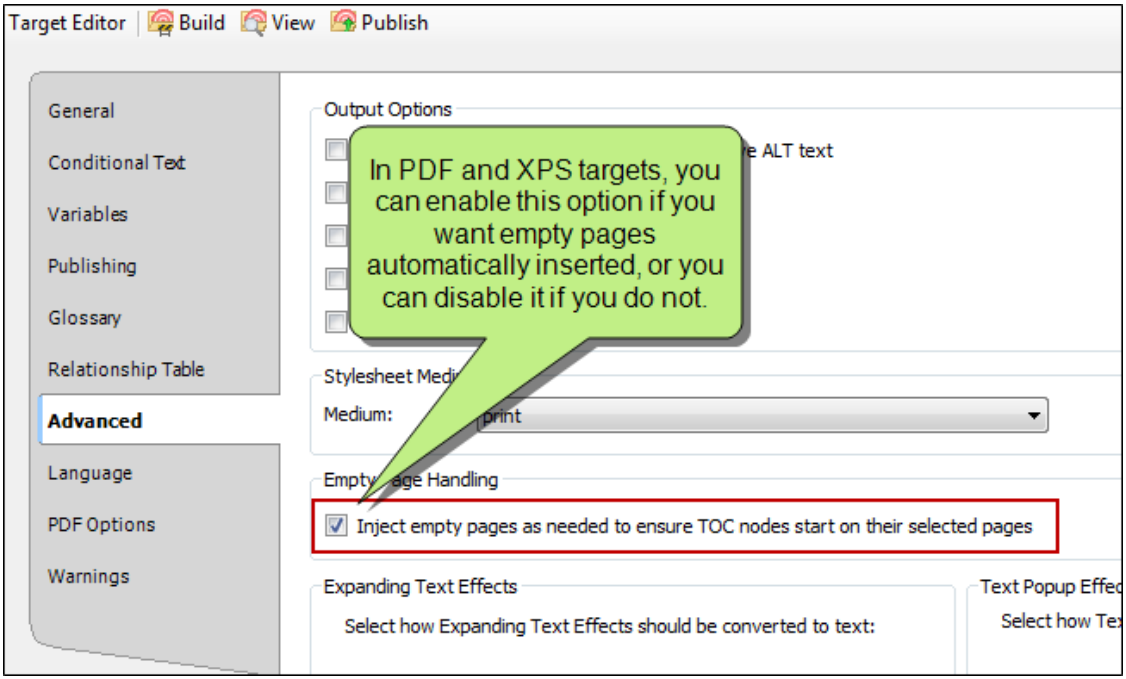
Here are the three kinds of empty page types available in Flare. See "Specifying Page Types" on page 372.

- **Empty** Select this type if you want the settings to be applied to an empty page in the output. You might use this page type after Title pages. Otherwise, you probably want to use the Empty Left and Empty Right page types instead.
- **Empty Left** Select this page type if you also have a First Right page type and need empty pages to be injected before them automatically when necessary (i.e., to force a new chapter to begin on the right side).
- **Empty Right** Select this page type if you also have a First Left page type and need empty pages to be injected before them automatically when necessary (i.e., to force a new chapter to begin on the left side).

Note: The empty page types are not supported in Microsoft Word output.

INJECTING EMPTY PAGES FOR PDF AND XPS

On the Advanced tab of the Target Editor for PDF and XPS outputs, there is a check box that is used in conjunction with empty page types to automatically include empty pages in the output when necessary.



Note: In order for this feature to work, you must have an empty page in your page layout.

EMPTY DOESN'T ALWAYS MEAN EMPTY

Although it is called an "empty" page type, it does not technically need to be left completely empty. You can add header or footer content, as well as a decoration frame to that page. The main difference with the other page types is that an empty page will not display any body text. It has two main purposes: (1) to be used immediately after the title page in a manual, and (2) to be used after the body content for a particular "chapter" runs out and you want to force the next chapter to start on a certain page.

E X A M P L E

Let's say you have a page layout with four pages—one using the First Right page type, another using the Right page type, another using the Left page type, and a final one using the Empty Left page type. You want the first page to display the frame content that is specified on the First Right page of the layout (e.g., perhaps there is no header, and the footer has a page number aligned right). Similarly, you want the odd-numbered pages to use the frame content from the Right page of the layout, and you want the even-numbered pages to use the frame content from the Left page of the layout.

When does an empty page display in the output? Let's say that when you associate the page layout with an entry in the outline TOC, you specify that the first page of that chapter should use the First Right page of the layout. For the next chapter in the outline TOC, you also specify the First Right page of the layout to begin that chapter. Your purpose is to ensure that the correct content is displayed on the first page of each chapter. Also, you want each chapter to begin on an odd (right) page. Therefore, if the previous chapter body text finishes on an odd page, you want an empty page to be forced on the even page before the next chapter starts.

The final result is that each chapter using that page layout will begin on an odd page, using the First Right page of the layout. As the chapter progresses, the odd pages will use the Right page in the layout and the even pages will use the Left page in the layout. Let's say the Chapter 5 content ends on page 83 (an odd page), an additional page will be inserted at the end of the chapter on page 84, using the Empty Left page from the layout. Chapter 6 will start on page 85, using the First Right page from the layout.

HOW TO USE AN EMPTY PAGE FOR A PAGE LAYOUT

1. Add a page layout to the project.
2. Add the necessary pages to the page layout. See "Adding Pages" on page 355.
3. Specify chapter breaks and page layouts for the appropriate entries in the outline TOC (where you want that layout to start being used in a new chapter document). See "Specifying Chapter and Page Layout Breaks" on page 542.
4. For PDF and XPS output, open the target. On the **Advanced** tab, click **Inject empty pages as needed to ensure TOC nodes start on their selected pages**.

   For details and graphics that show how these different options work together to create output that flows the way you want, see "Page Type Flow Scenarios" on the following page.
5. Click to save your work.

Note: When it comes to associating page layouts with entries in an outline TOC, it is important to understand the meaning of the word "chapter" in the Properties dialog. In that dialog, a "chapter" is simply the designation for a new portion of content that will use a particular page layout. It does not mean a chapter in the traditional sense of a manual. For example, if you have a title page, a TOC, 10 chapters, and an index in your manual, each one of those might be considered a separate chapter as far as the dialog is concerned, because you are creating a chapter break with a particular page layout specified at each of those locations in the outline TOC. Therefore, although you only have 10 chapters in the traditional meaning of the word, you might have 13 chapters as far as the dialog is concerned (one for the title page, one for the TOC, one for each traditional chapter, and one for the index).

Page Type Flow Scenarios

Following are some of the most common scenarios for configuring print-based output, including the settings necessary to make each work:

- **First Right Page** You want new chapters to always start on a right page.
- **First Left Page** You want new chapters to always start on a left page.
- **First Left or Right Page** You want new chapters to start on either a left or right page.
- **First and Normal** You are not concerned with left or right pages, only that new chapter pages look different than the rest of the pages in the manual.
- **Page Orientation Change Mid-Chapter**You need to change the way pages look in the middle of a chapter (e.g., switching from a portrait orientation to landscape orientation).

RELEVANT SETTINGS

The relevant settings in most of these scenarios include the following:

- **Page Types** For each page in a layout that you create, you can assign a type to determine how that page behaves in the output. For example, if you want odd pages in the output to always display particular header content or look a certain way, you can create a page with the Right page type.

  The question in the following scenarios is, which page types should you include in the page layout?

- **Inject Empty Pages** On the Advanced tab of the Target Editor for PDF and XPS outputs, there is a check box that is used in conjunction with empty page types to automatically include empty pages in the output when necessary.

  The question in the following scenarios is, should this option be enabled or disabled?

- **TOC Entries** After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). You can do this with or without creating a chapter break at the same time.

  The question in the following scenarios is, where should chapter or page layout breaks be set, and which page type should be selected?

Tip: Because you will likely be setting the same chapter break/page type for many TOC entries, you can hold down your CTRL key and select the entries. Then open the Properties dialog and select the options at the same time for all of those entries.

Note: In the following scenarios, we also used the "Use TOC depth for heading levels" option in the Target Editor. This option is not necessarily important to make the pages flow as described below. Rather, it is simply needed because of the way we have created the online TOC in these examples and because all topics start with an H1 heading.

Note: To make sure you can see the actual flow of left-right pages in the output, you can set the page layout view in the PDF Options tab of the Target Editor. This lets you control how the pages display initially in the output (e.g., Two-Up Continuous (Cover Page), Two-Up Continuous (Facing), Single Page Continuous).

INITIALS REPRESENTING PAGE TYPES

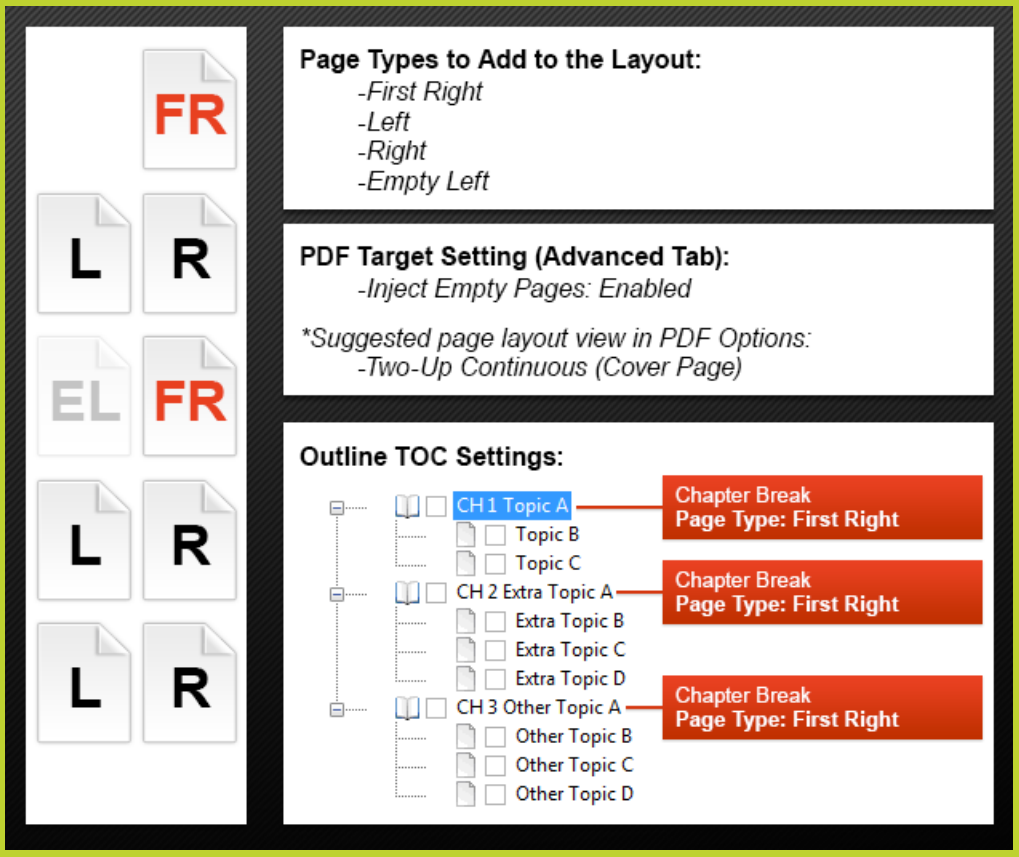
In these scenarios the letters in the page images represent the page types.

- F=First
- FL=First Left
- FR=First Right
- L=Left
- R=Right
- E=Empty
- EL=Empty Left
- ER=Empty Right
- N=Normal

Note: Although it is certainly acceptable to have a Title (T) page type included with other page types in many of the following layout scenarios, we are not using one in these scenarios for the sake of simplicity. In some cases it is better to have your Title page type, if you use one, in a page layout separate from your chapter page layout.

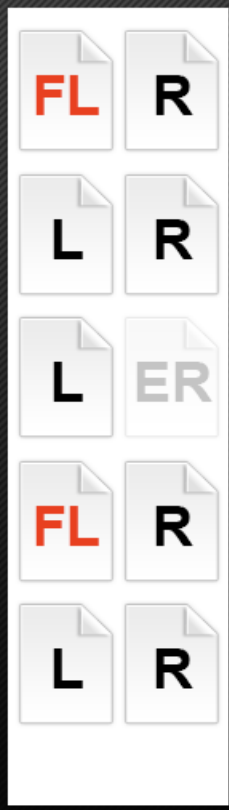
FIRST RIGHT SCENARIO

With this scenario, topics set with new chapter breaks will always start on the *right* side in the output.



FIRST LEFT SCENARIO

With this scenario, topics set with new chapter breaks will always start on the *left* side in the output.



Page Types to Add to the Layout:

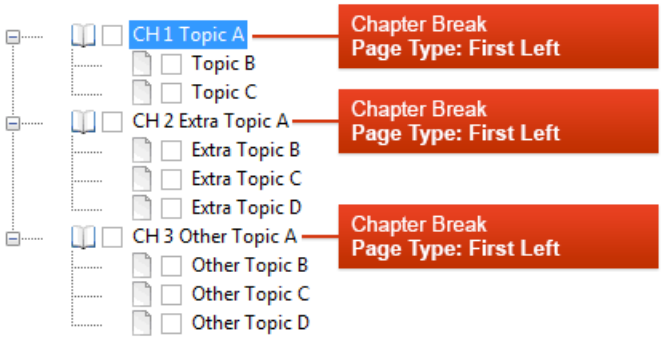
-First Left
-Right
-Left
-Empty Right

PDF Target Setting (Advanced Tab):

-Inject Empty Pages: Enabled

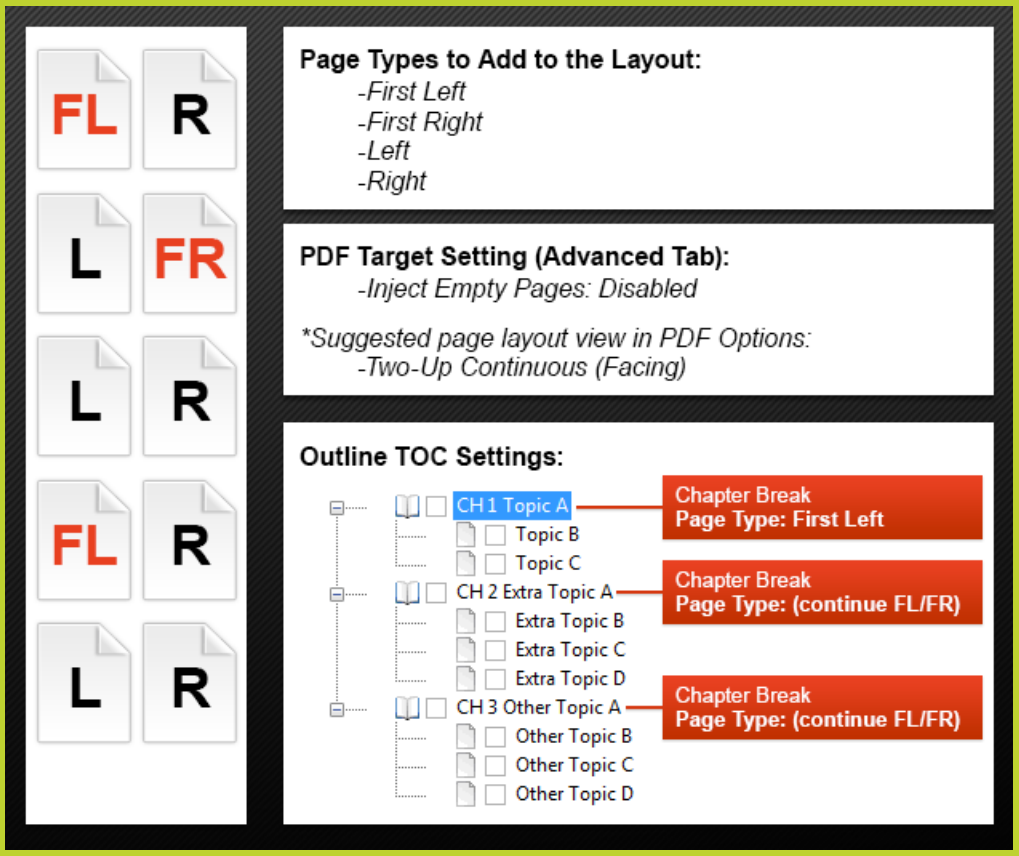
**Suggested page layout view in PDF Options:*
-Two-Up Continuous (Facing)

Outline TOC Settings:



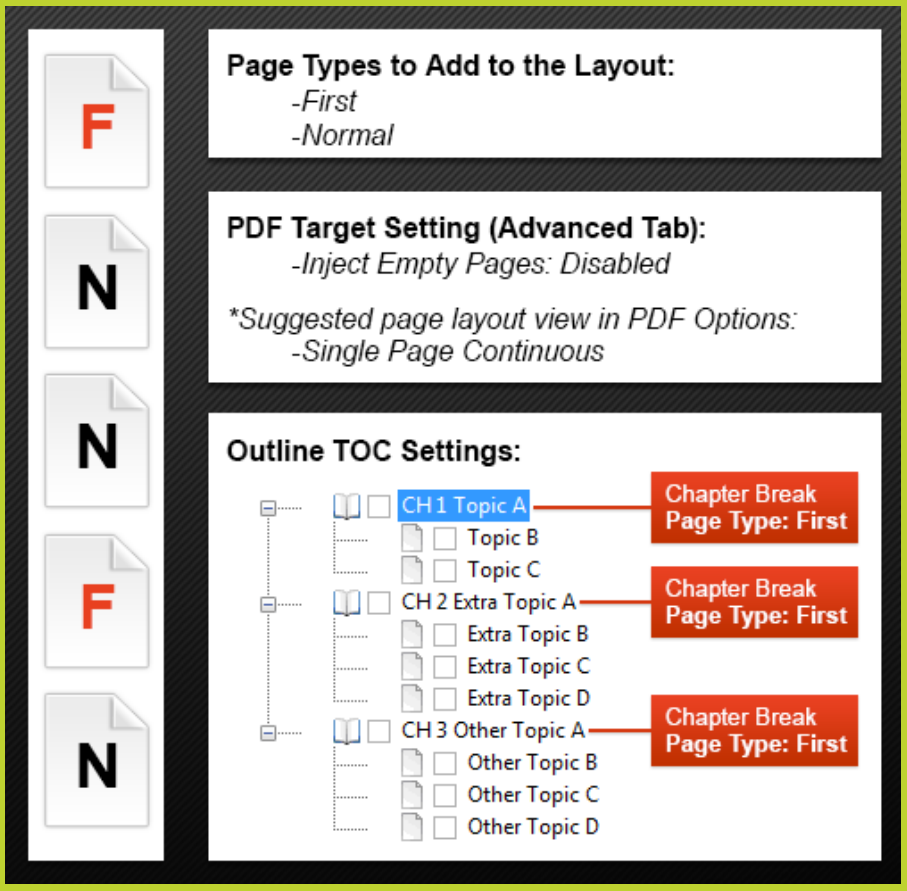
FIRST LEFT OR FIRST RIGHT SCENARIO

With this scenario, topics set with new chapter breaks will start on *either the right or left* side in the output, depending on where the previous page ends.



FIRST AND NORMAL SCENARIO

With this scenario, there is no concern over right or left pages. Instead, the idea is to have one look for the *first* page of a new chapter, and the rest of the pages in the chapter will all share a different look (*normal*).

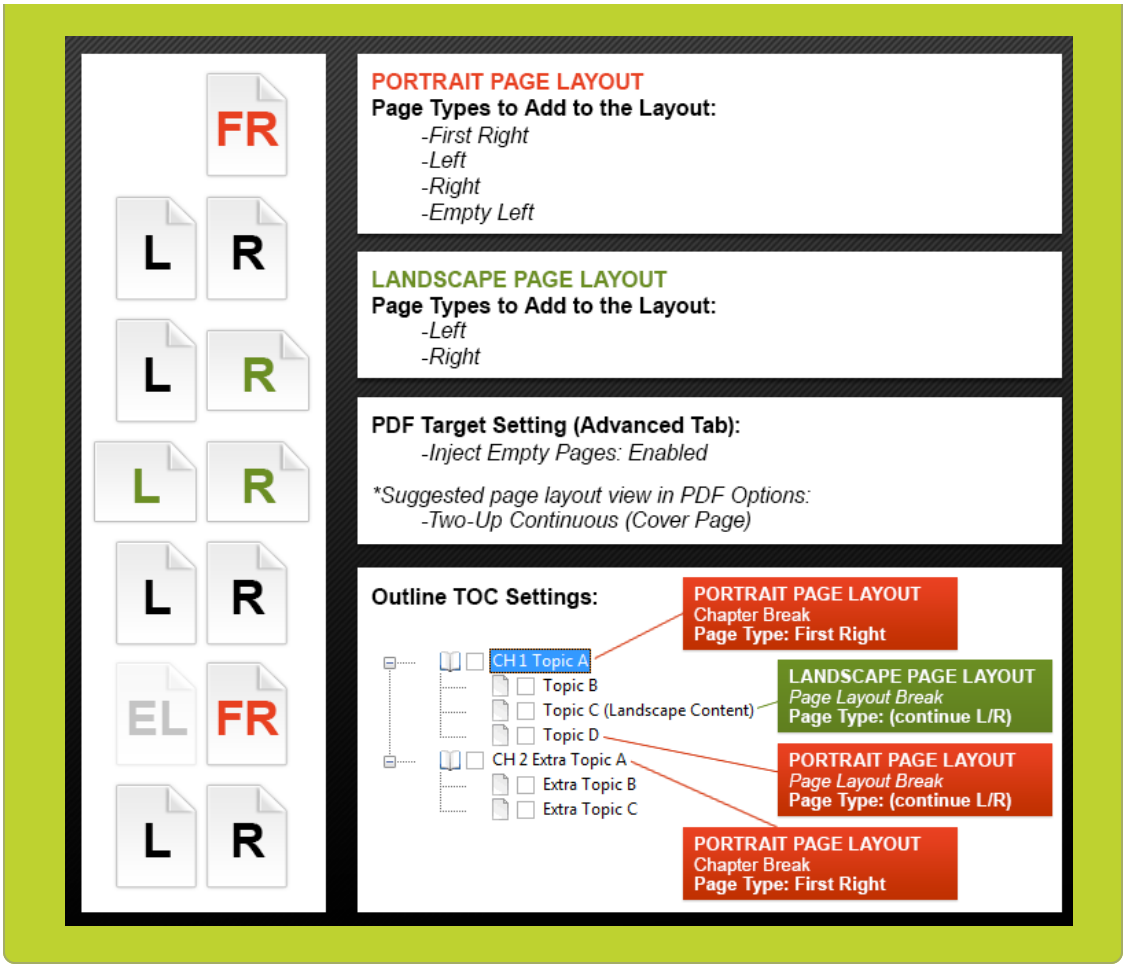


PAGE ORIENTATION CHANGE MID-CHAPTER SCENARIO

With this scenario, you have a left-right page flow, but in the middle of the chapter you want to switch to a landscape orientation for one or more pages before return to the portrait orientation. However, you want to make sure that the proper left and right pages continue to show throughout this. The way to do this is with page layout breaks on the TOC entries, using the *(continue L/R)* option.

One important aspect to this scenario is that it requires two different page layouts—one for the pages using the portrait orientation, and another for pages using the landscape orientation.

Also, in the following image the First Right and Empty Left page types are optional. We are including them in the portrait page layout only to show context for the left-right pages and the change of page orientation in the middle of a chapter. The page types that are most important for this flow are *Left* and *Right*.


FR
L
R
L
R
L
R
L
R
EL
FR
L
R
PORTRAIT PAGE LAYOUT
Page Types to Add to the Layout:
-First Right
-Left
-Right
-Empty Left
LANDSCAPE PAGE LAYOUT
Page Types to Add to the Layout:
-Left
-Right
PDF Target Setting (Advanced Tab):
-Inject Empty Pages: Enabled
*Suggested page layout view in PDF Options:
-Two-Up Continuous (Cover Page)
Outline TOC Settings:
CH 1 Topic A
Topic B
Topic C (Landscape Content)
Topic D
CH 2 Extra Topic A
Extra Topic B
Extra Topic C
PORTRAIT PAGE LAYOUT
Chapter Break
Page Type: First Right
LANDSCAPE PAGE LAYOUT
Page Layout Break
Page Type: (continue L/R)
PORTRAIT PAGE LAYOUT
Page Layout Break
Page Type: (continue L/R)
PORTRAIT PAGE LAYOUT
Chapter Break
Page Type: First Right

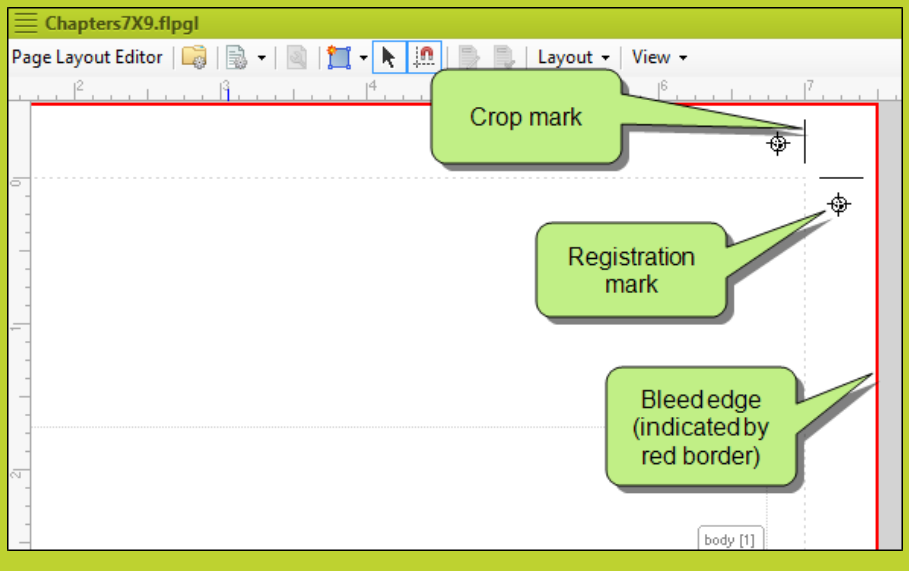
Showing the Bleed, Crop, and Registration Marks in Page Layouts

You can show or hide indicators that reveal where printer's marks are set (e.g., crop marks, registration marks, and bleeds):

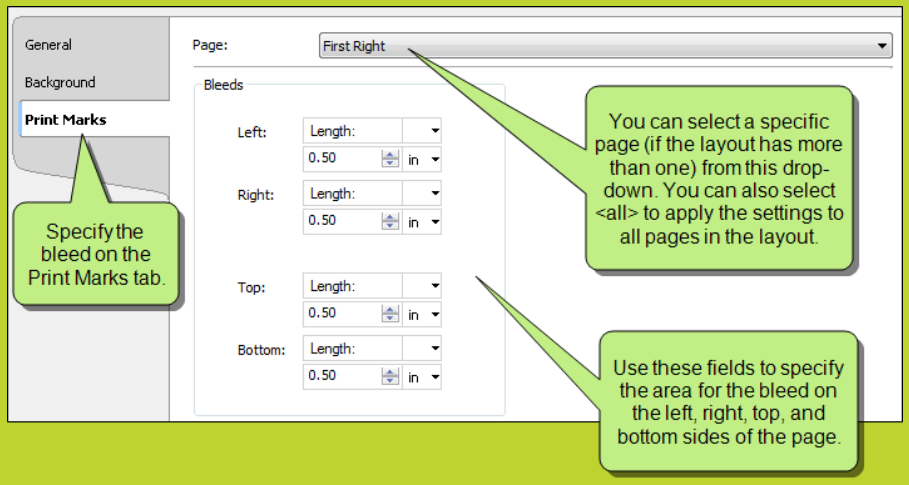
- **Bleed** This refers to the area beyond the edge of the page where printing occurs. Professional printers use the bleed to prevent a final trimmed document from having unprinted areas along the edge of the document. You can set the size of the bleed in the Page Properties dialog. See "Specifying the Page Bleed Size" on page 368.
- **Crop Marks** These are thin vertical and horizontal lines that show the edges of the page, where it will be trimmed by the printer. The location of crop marks are determined by the page size you specify.
- **Registration Marks** These are small cross-hair target icons shown next to crop marks. Each color in the final output is printed on its own layer. Therefore, in order to make sure the colors are matched up accurately, printers use registration marks to align plates on the press.

E X A M P L E

This is a page layout showing the bleed, along with crop and registration marks.



You can open the Page Properties dialog by double-clicking in the Page Layout Editor (not on a frame). This is where the bleed size is specified for a page.



HOW TO SHOW THE BLEED, CROP, AND REGISTRATION MARKS IN PAGE LAYOUTS

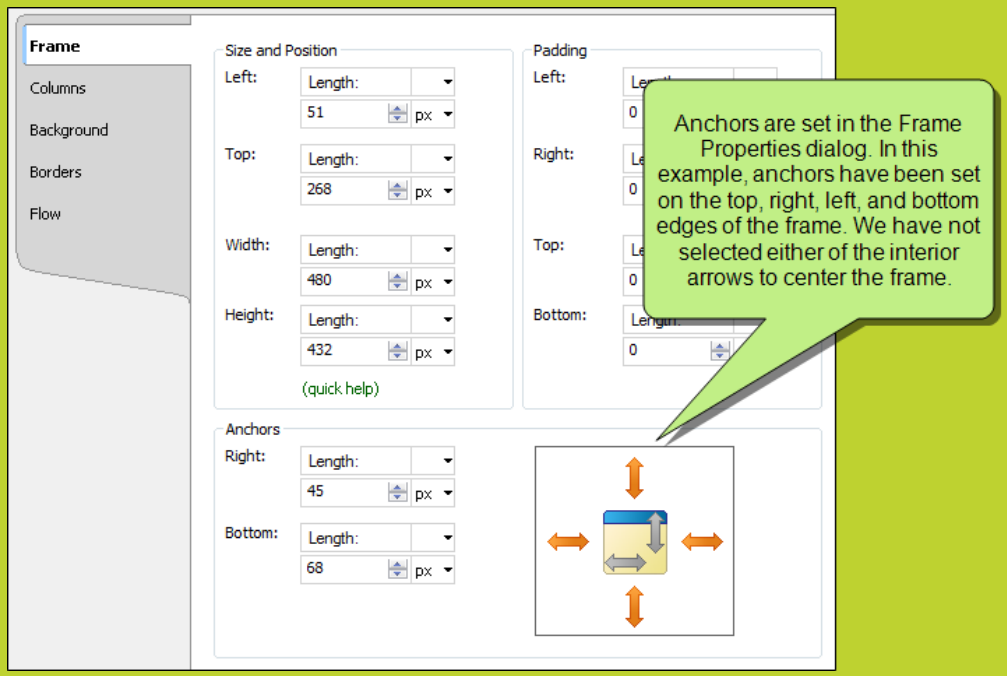
1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Bleed**.

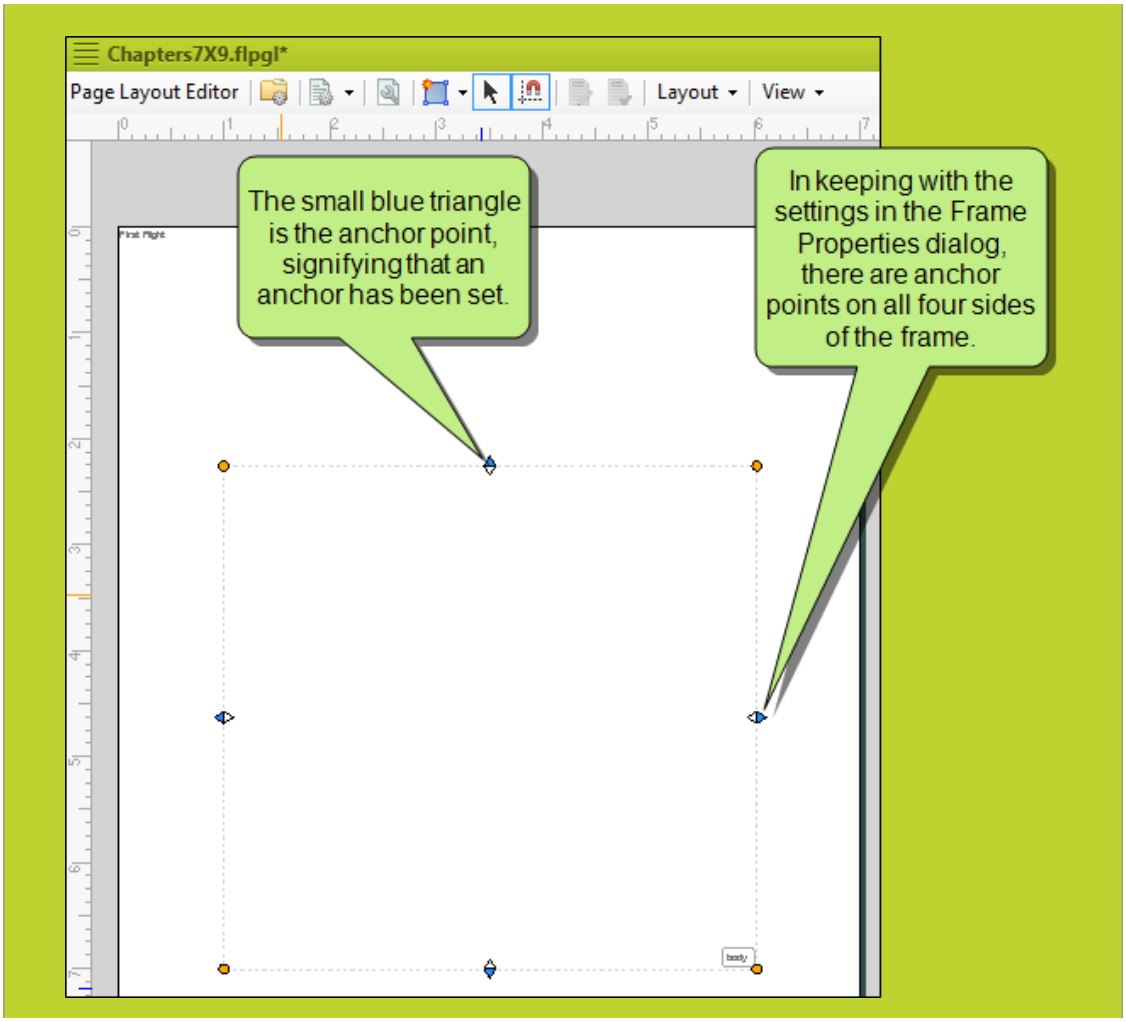
Showing Frame Anchor Lines in Page Layouts

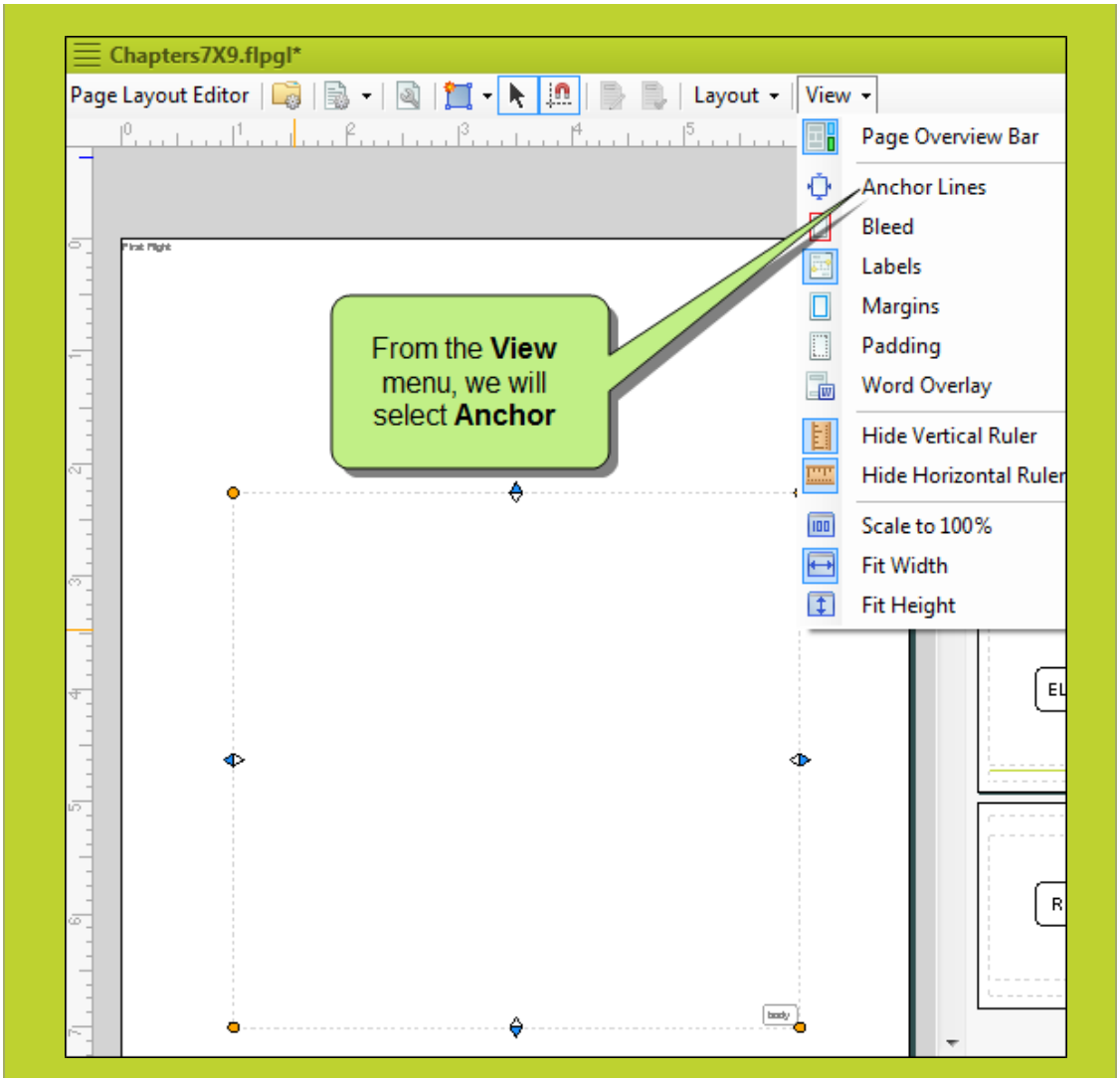
If you have anchors enabled on a frame, this option displays lines to show where the anchors are placed. See "Setting Frame Anchors" on page 448.

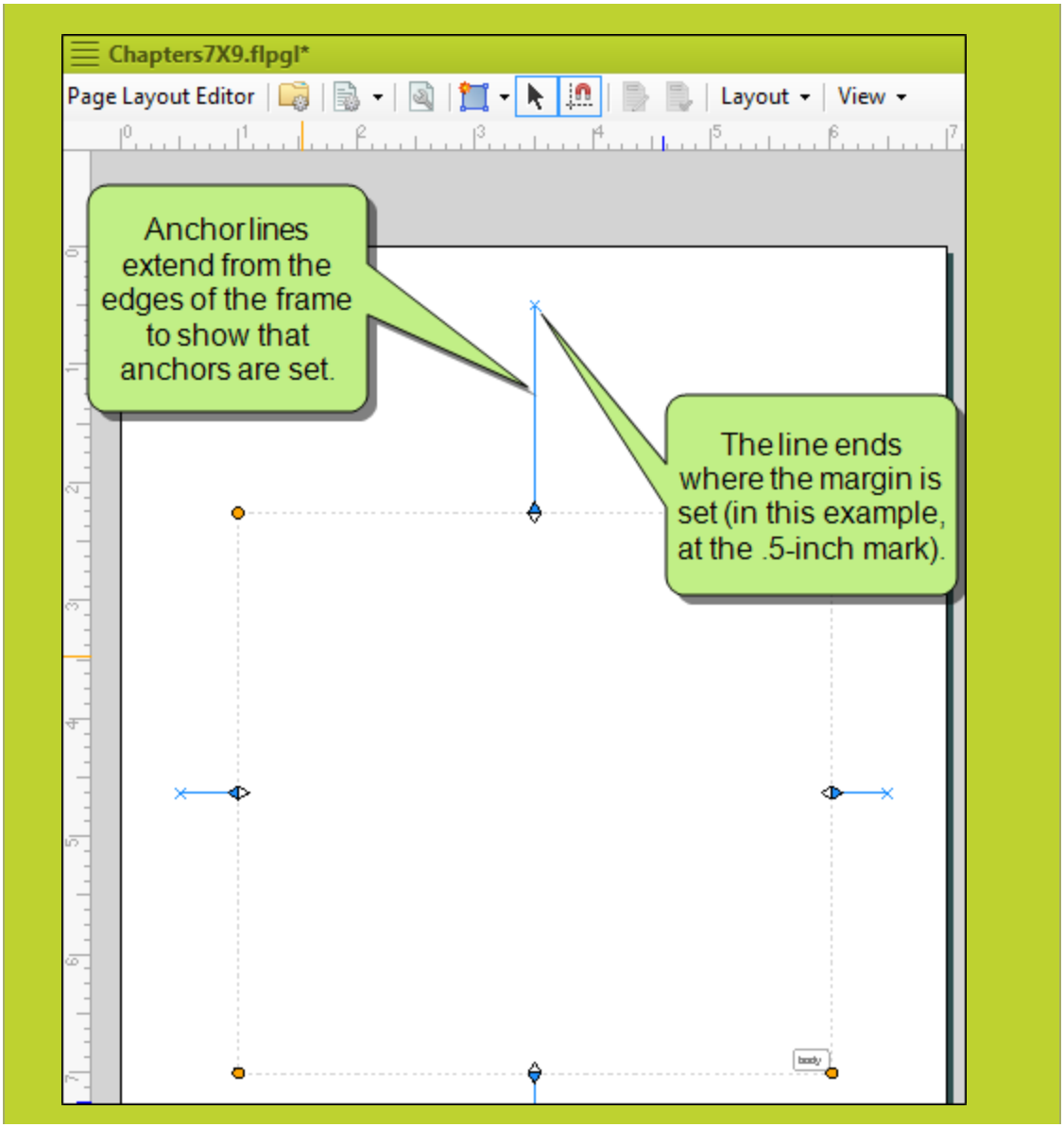
E X A M P L E

Let's say you want to set anchors on all four sides of a frame so that it adjusts automatically when we change the page size. In that case, you would do this.

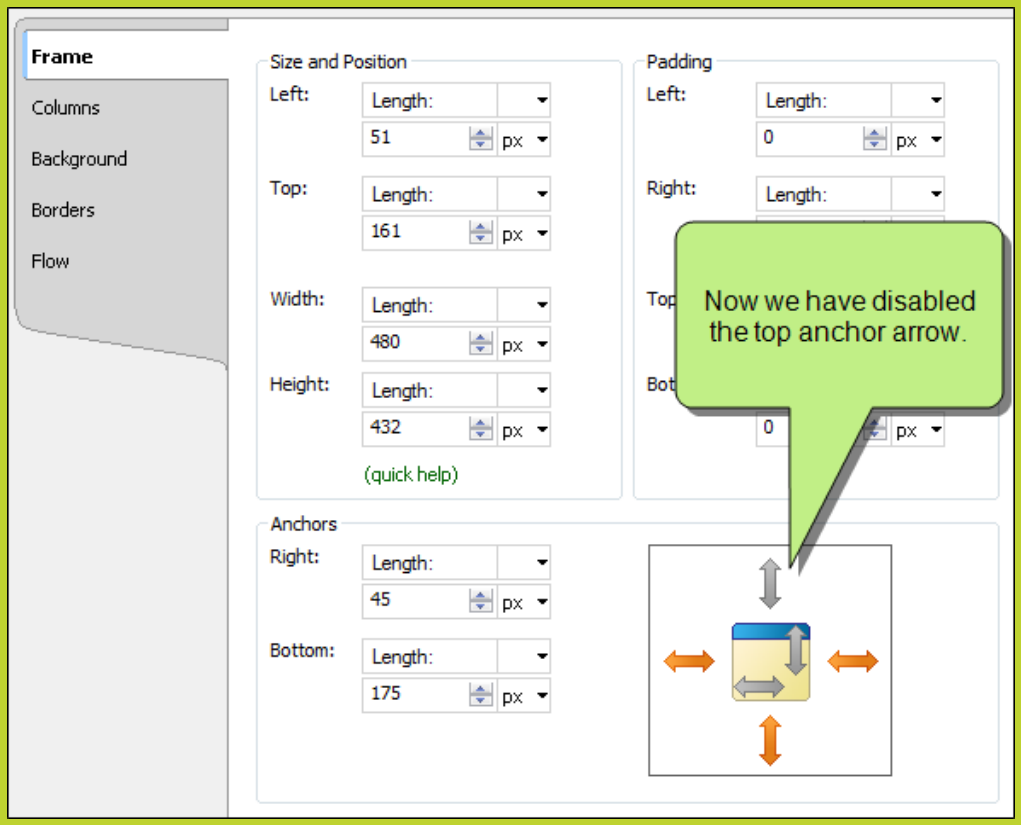


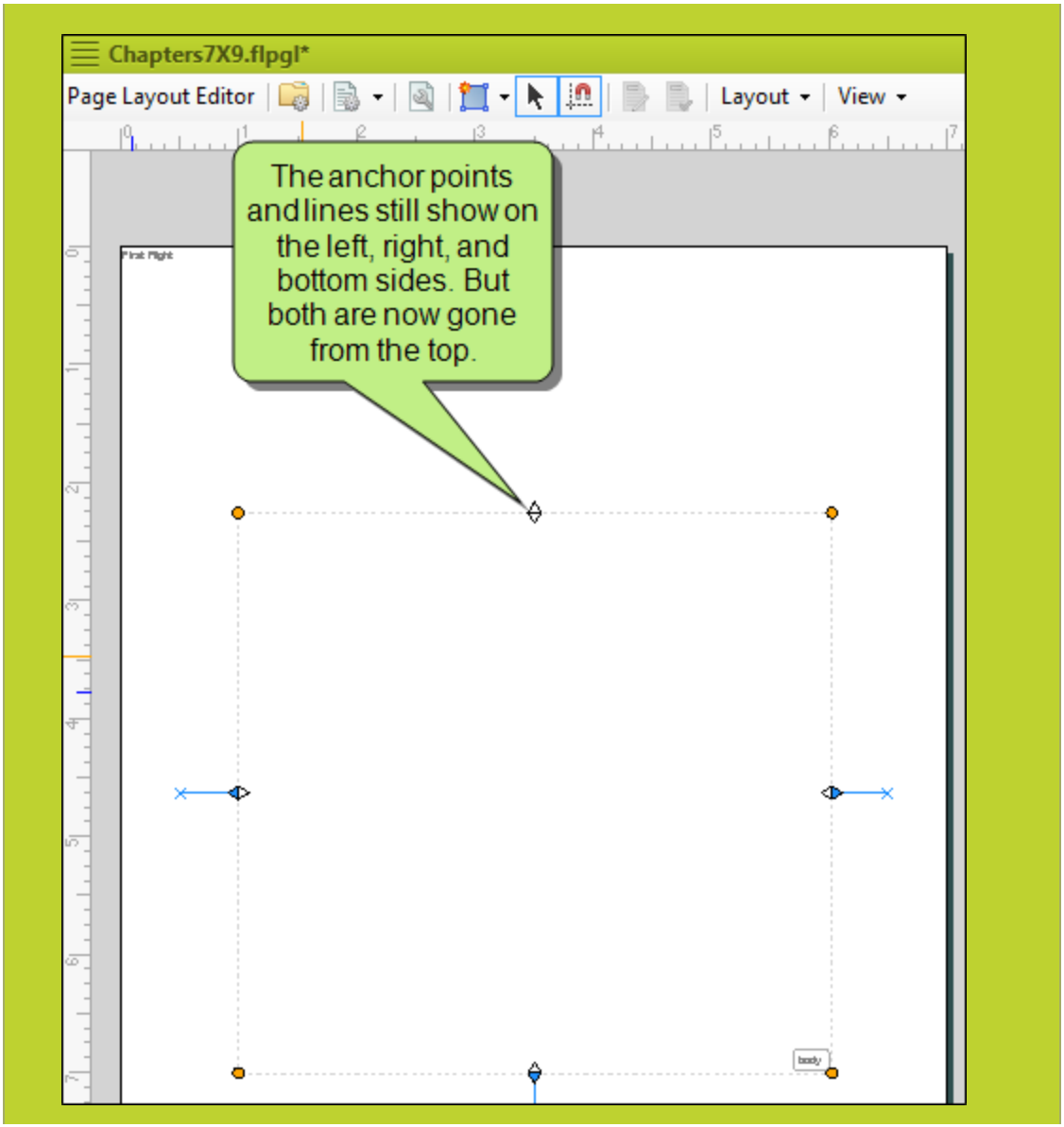

Chapters7X9.flpgl*
Page Layout Editor
Layout
View
The small blue triangle is the anchor point, signifying that an anchor has been set.
In keeping with the settings in the Frame Properties dialog, there are anchor points on all four sides of the frame.
First Right
body


Chapters7X9.flpgl*
Page Layout Editor
Layout
View
Page Overview Bar
Anchor Lines
Bleed
Labels
Margins
Padding
Word Overlay
Hide Vertical Ruler
Hide Horizontal Ruler
Scale to 100%
Fit Width
Fit Height
From the View menu, we will select Anchor

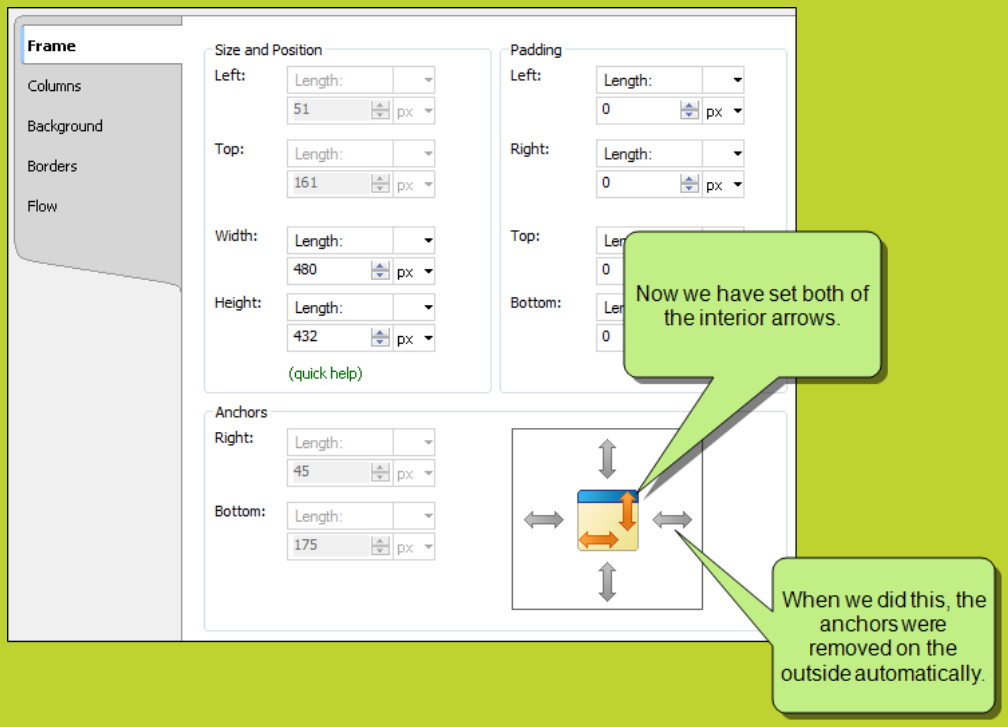

Chapters7X9.flpgl*
Page Layout Editor
Layout
View
Anchor lines extend from the edges of the frame to show that anchors are set.
The line ends where the margin is set (in this example, at the .5-inch mark).
body

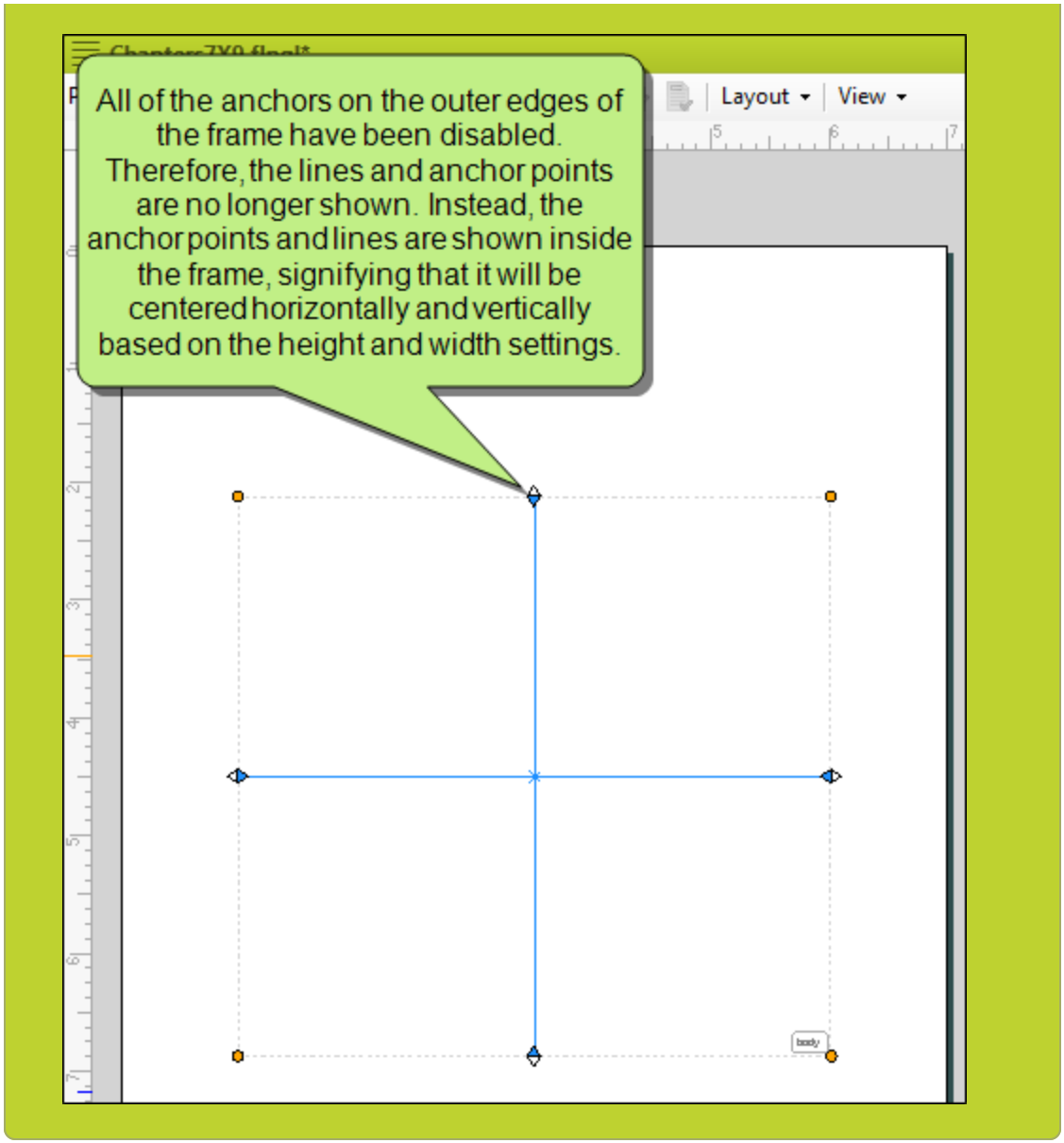
Now let's change the anchor settings.




Chapters7X9.flpgl*
Page Layout Editor
Layout
View
The anchor points and lines still show on the left, right, and bottom sides. But both are now gone from the top.
body

Now let's lock the frame's height and width, centering the frame horizontally and vertically.




All of the anchors on the outer edges of the frame have been disabled. Therefore, the lines and anchor points are no longer shown. Instead, the anchor points and lines are shown inside the frame, signifying that it will be centered horizontally and vertically based on the height and width settings.
Layout
View
body

HOW TO SHOW FRAME ANCHOR LINES IN PAGE LAYOUTS

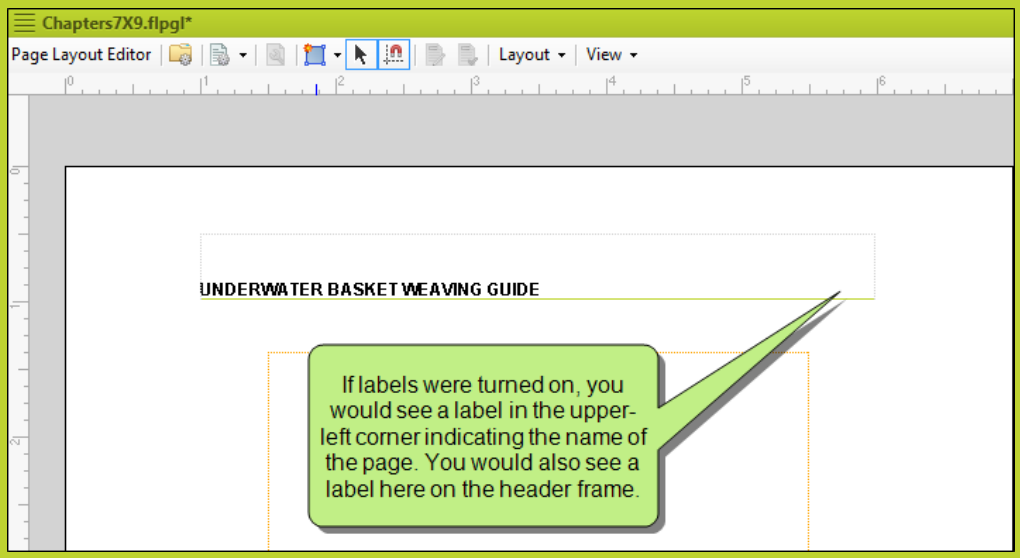
1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Anchor Lines**.

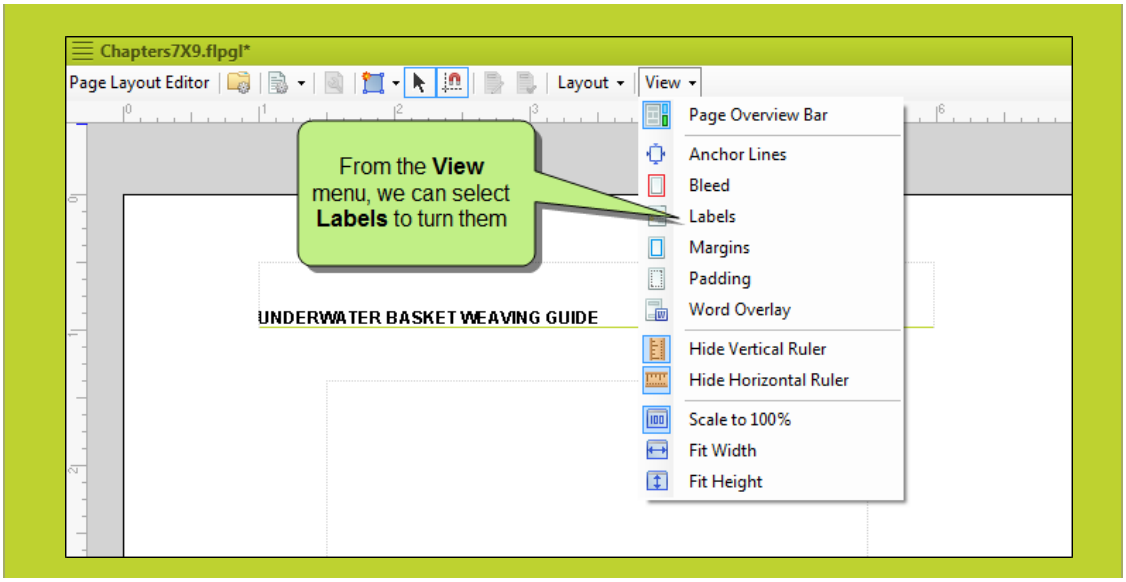
Showing Labels in Page Layouts

You can turn on indicators to see labels on a page, both for the page itself and frames within it.

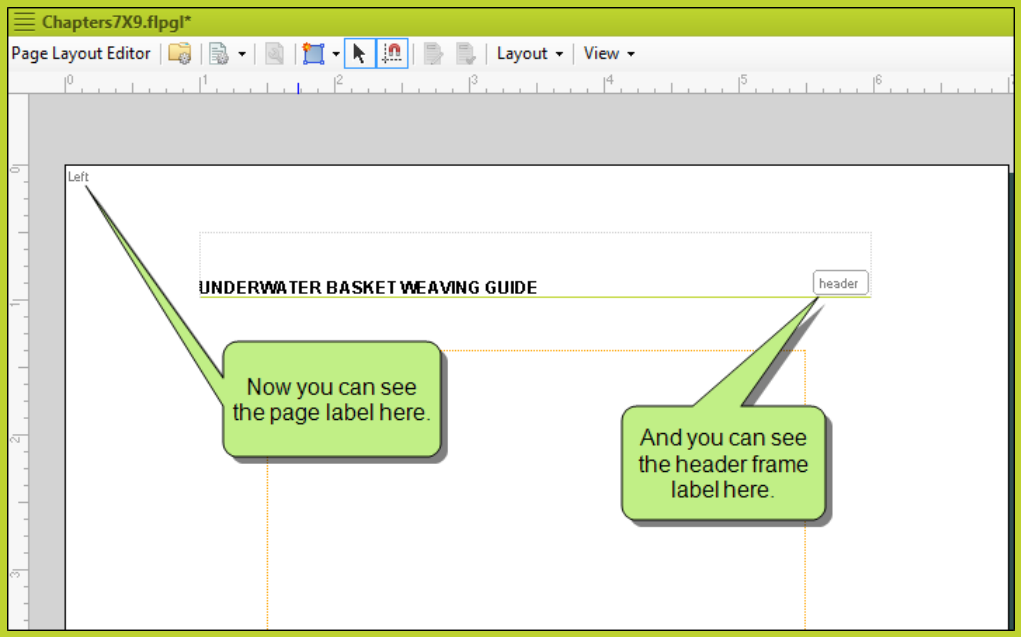
E X A M P L E

This is a page layout *without* labels shown.




Chapters7X9.flpgl*
Page Layout Editor
Layout
View
From the **View** menu, we can select **Labels** to turn them
UNDERWATER BASKET WEAVING GUIDE
Page Overview Bar
Anchor Lines
Bleed
Labels
Margins
Padding
Word Overlay
Hide Vertical Ruler
Hide Horizontal Ruler
Scale to 100%
Fit Width
Fit Height

This is a page layout *with* labels shown.



HOW TO SHOW LABELS IN PAGE LAYOUTS

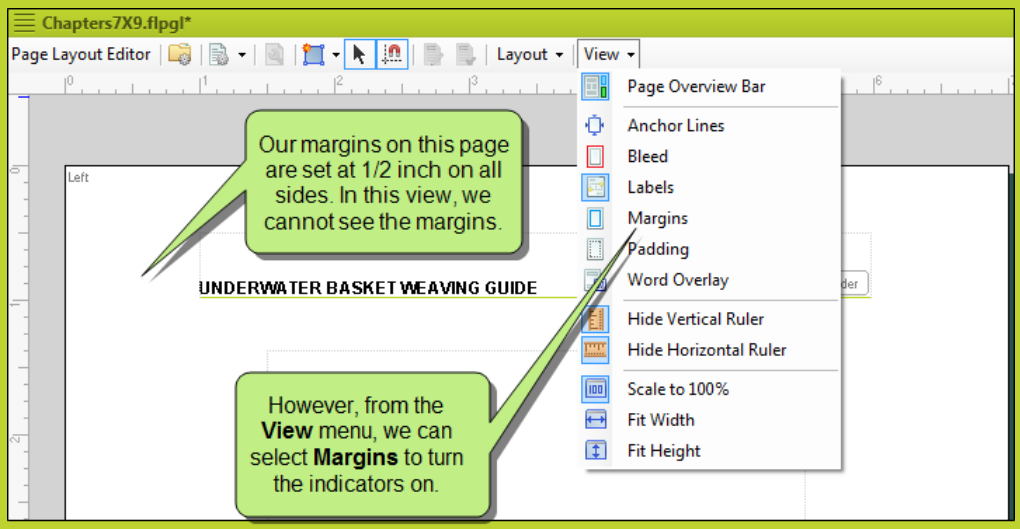
1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Labels**.

Showing Margins in Page Layouts

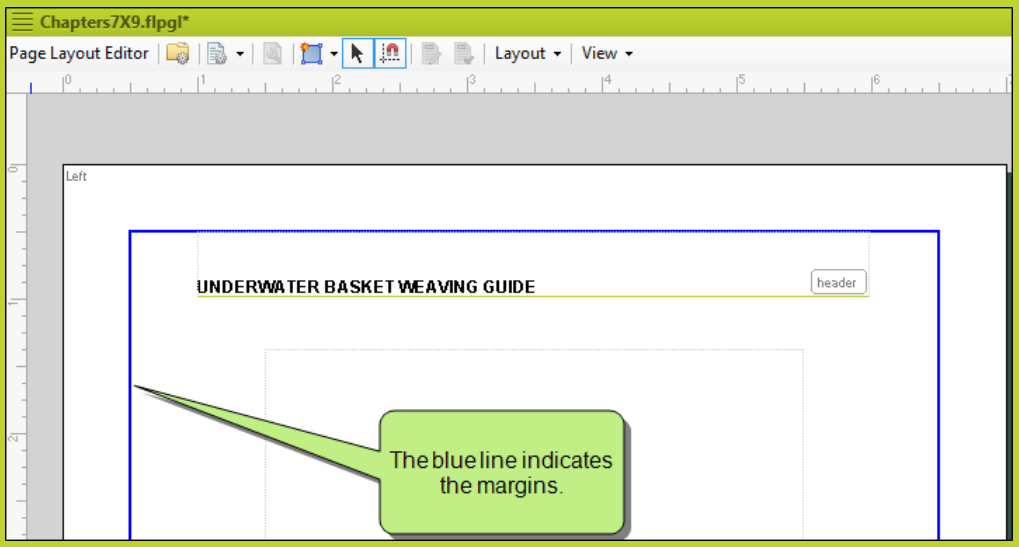
You can turn on indicators to see where your margins are set on a page.

E X A M P L E

This is a page layout *without* margin indicators shown.



This is a page layout *with* margin indicators shown.



HOW TO SHOW MARGINS IN PAGE LAYOUTS

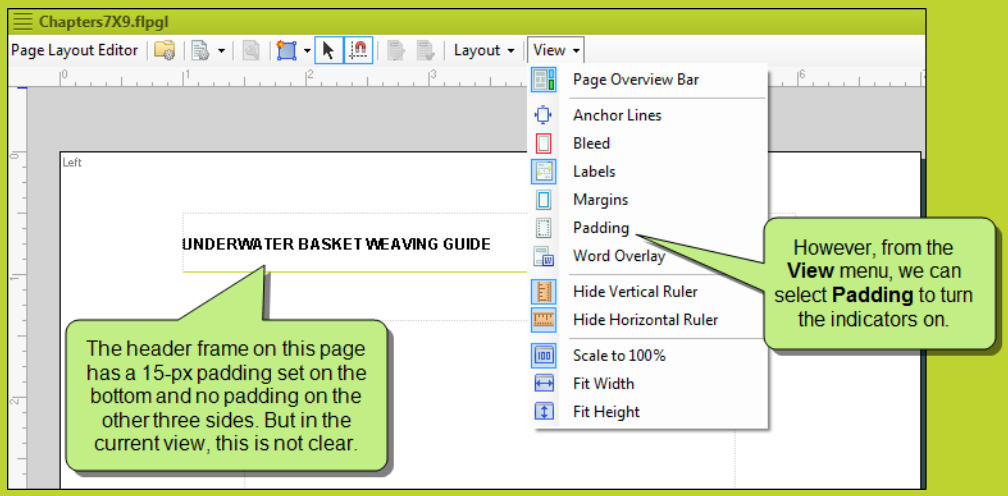
1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Margins**.

Showing Padding in Page Layouts

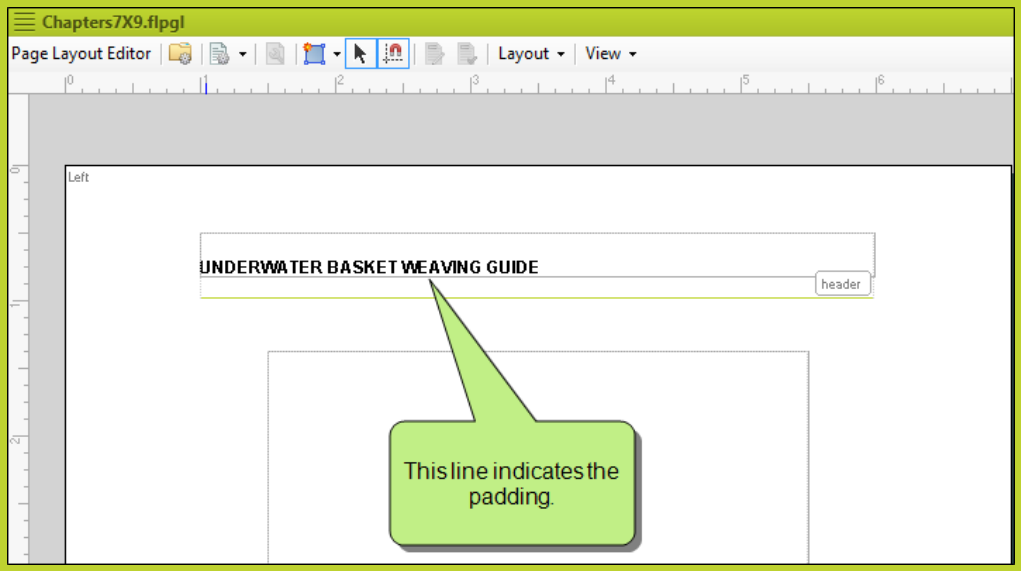
You can turn on indicators to see where padding is set in a frame.

E X A M P L E

This is a frame *without* padding indicators shown.



This is a frame *with* padding indicators shown.

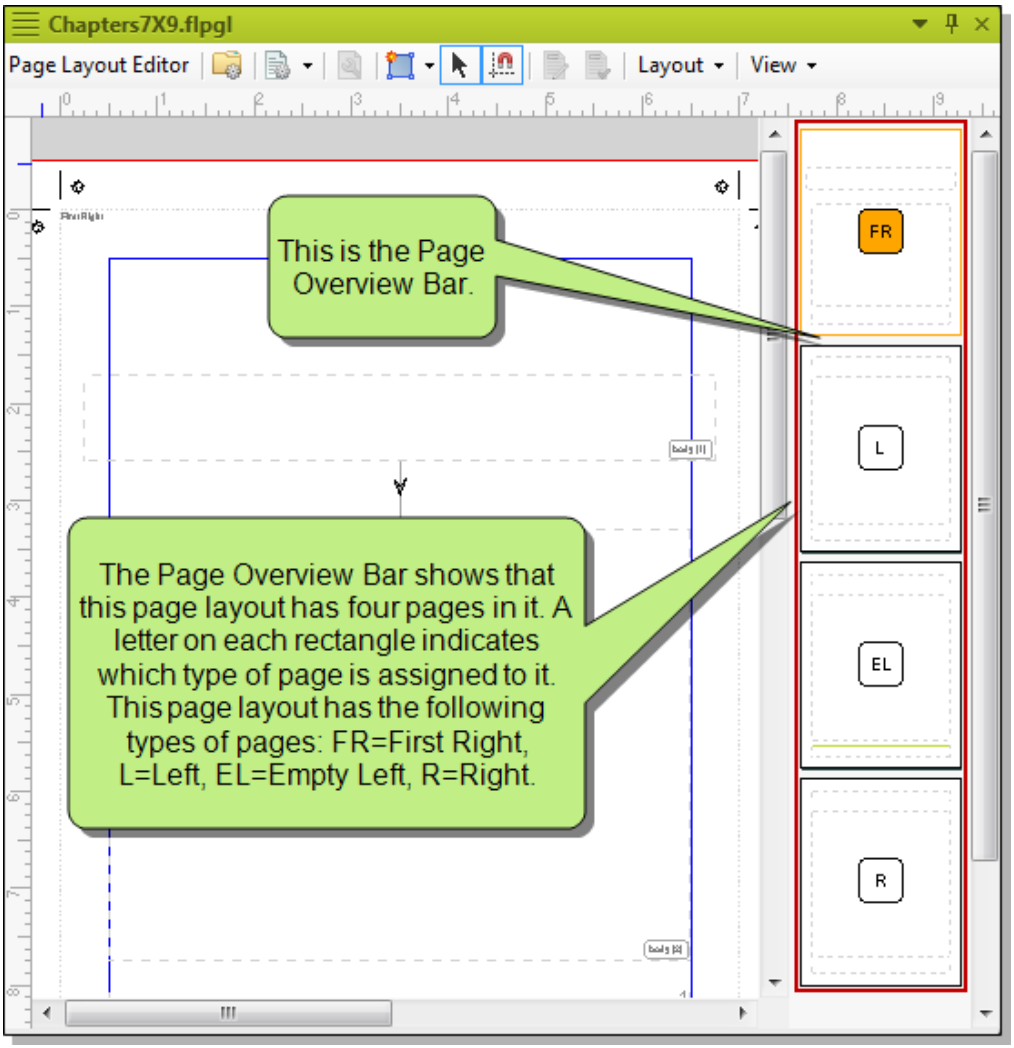


HOW TO SHOW PADDING IN PAGE LAYOUTS

1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Padding**.

Showing the Page Overview Bar in Page Layouts

You can show or hide the Page Overview Bar, which is the area on the right side of the Page Layout Editor that displays small rectangles, representing each page in the layout.



HOW TO SHOW THE PAGE OVERVIEW BAR IN PAGE LAYOUTS

1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Page Overview Bar**.

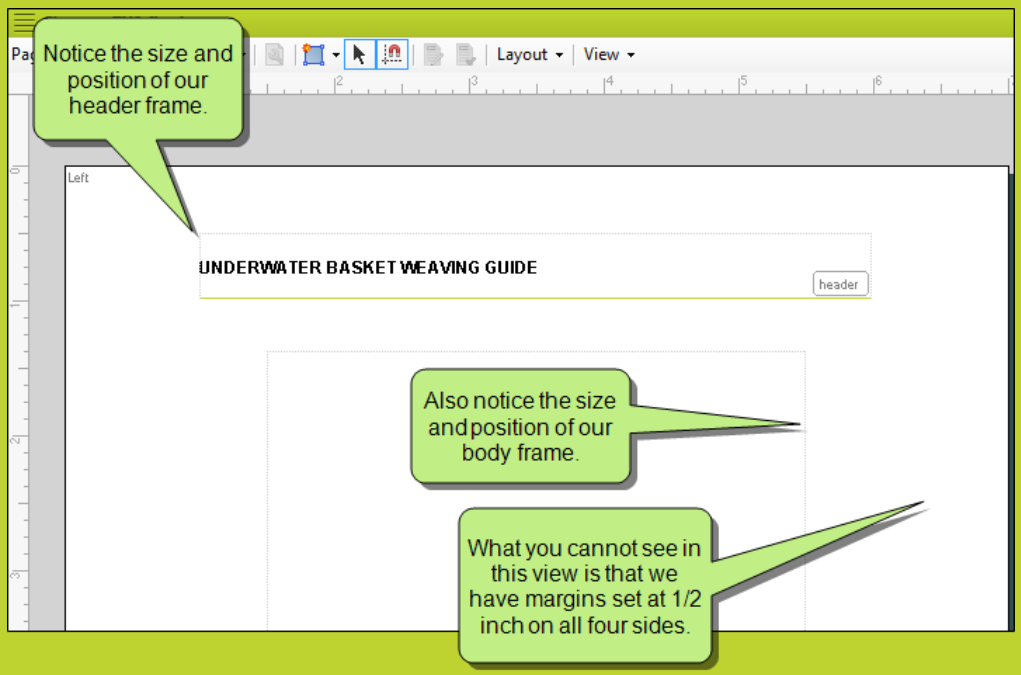
Showing the Word Overlay in Page Layouts

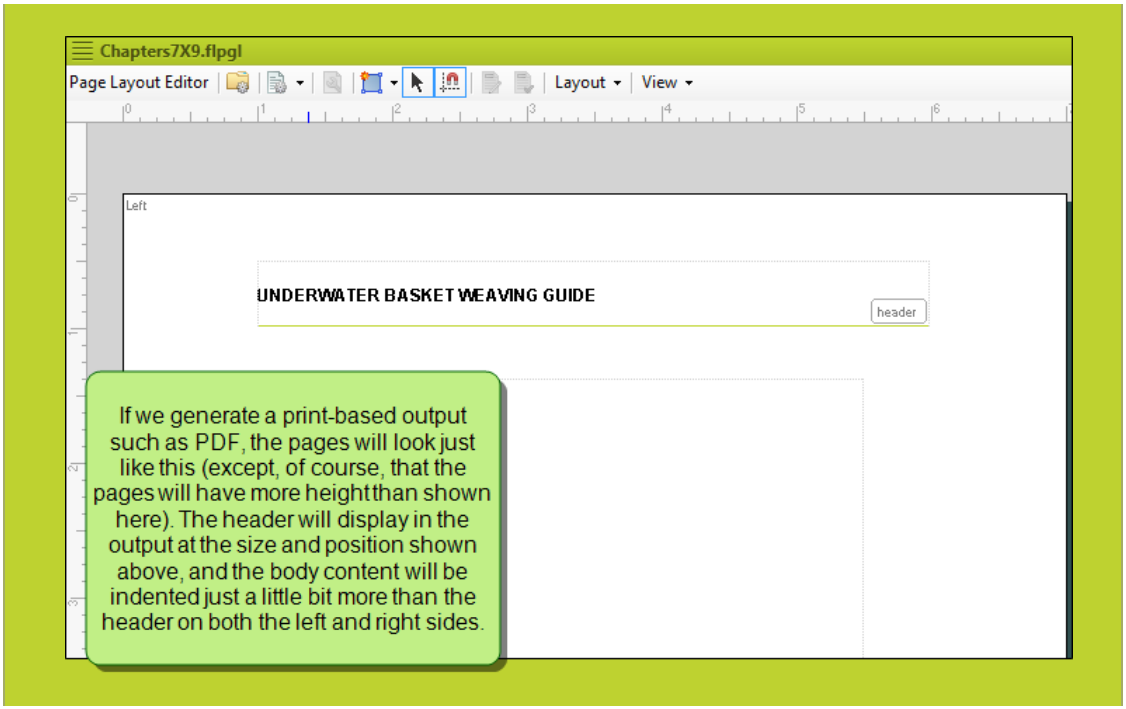
You can select an option in the Page Layout Editor that shows the real header, footer, and body areas if the page layout will be used in Microsoft Word output.

Why is it important to have a special page layout view for Word output? Because Word treats the header, footer, and body areas differently than Flare and other outputs treat them. In Flare the frames are determined by the sizes that you specify either in the Frame Properties dialog or by drawing them on the page. But in Word, frames are determined instead by the margins and content within the frames. Therefore, if you send output to Word, you might end up with results that you do not expect, unless you use the Word Overlay to see what the actual results will be.

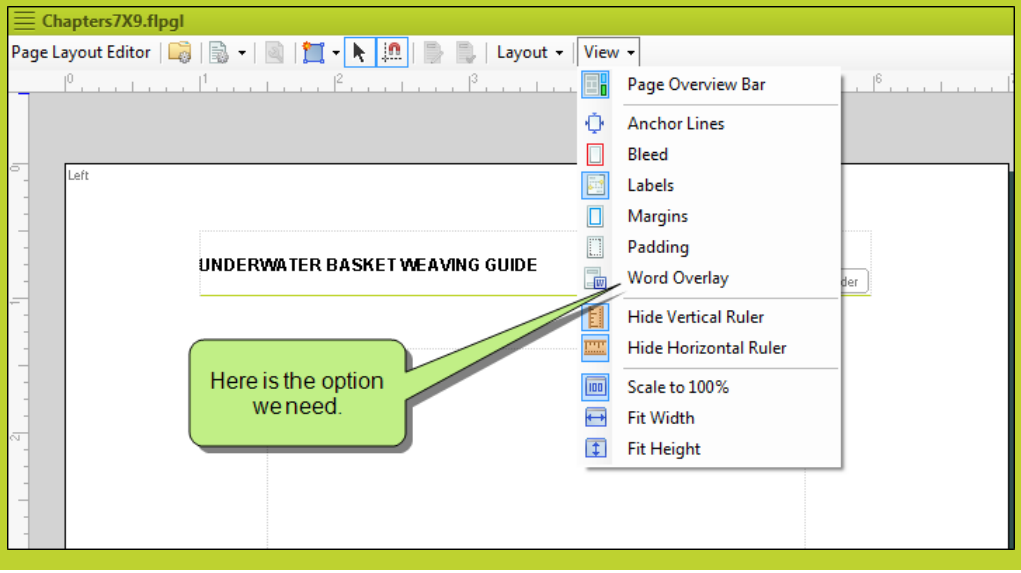
E X A M P L E

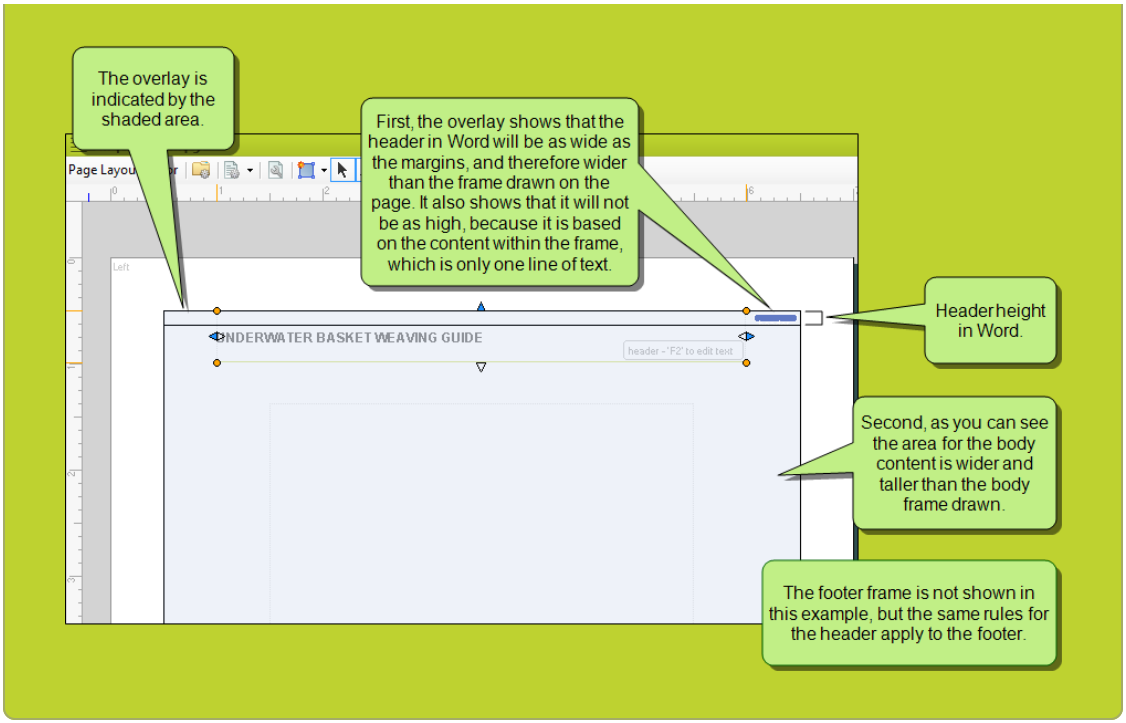
Let's say you have a page that looks like this.




Chapters7X9.flpgl
Page Layout Editor
Layout
View
Left
UNDERWATER BASKET WEAVING GUIDE
header
If we generate a print-based output such as PDF, the pages will look just like this (except, of course, that the pages will have more height than shown here). The header will display in the output at the size and position shown above, and the body content will be indented just a little bit more than the header on both the left and right sides.

Although most of the print-based outputs will create pages that look like this on the surface, Word is going to do something a little different. In order to see what Word will do, we turn on the Word Overlay.





HOW TO SHOW THE WORD OVERLAY IN PAGE LAYOUTS

1. Open a page in a page layout.
2. In the local toolbar, click View.
3. From the drop-down, select **Word Overlay**.

Note: You can still edit frames when the Word Overlay view is enabled.

Adding Text and Content to Frames

You can add any kind of content to a frame that you can add to a regular topic (e.g., text, links, images).

HOW TO ADD TEXT AND CONTENT TO A FRAME

1. Open a page in a page layout.
2. Click on the frame to which you want to add text or other content.

> **Note:** You can add text and content only to header, footer, and decoration frames. You cannot add text and content to a body frame (which automatically displays content from your topics). You can use image frames to insert images that use all of the space in the frame.

3. Do one of the following, depending on the part of the user interface you are using:
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** Press **F2** on your keyboard.
   - **Right-click** Right-click the frame and select **Edit Text**.

   A message opens, asking if you want to pick content from a template (e.g., a page number).
4. Click **No**. The Frame Contents window pane opens.

> **Note:** If you have already prepared content in the form of a snippet and added it to your template folder, you can click "Yes" instead in order to select the snippet. For more information about templates, see the online Help.

5. Click in the Frame Contents window pane and add text or other content (e.g., images), just as you would add content to a topic in the XML Editor.
6. Click to save your work.

Using the Snap Feature in Page Layouts

Page layouts can consist of one or more frames, which are used as placeholders for different kinds of content and information (e.g., page numbers, page header or footer text, body text). In order to help you more accurately place these frames on the page, you can use the snap feature.

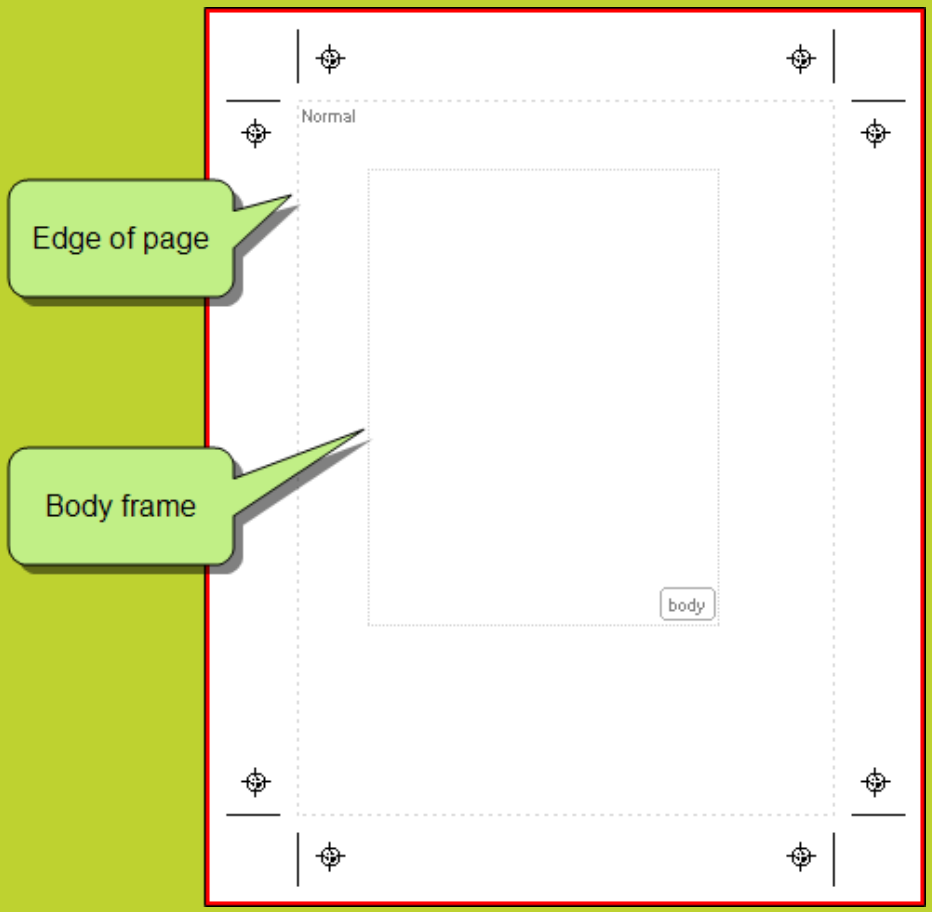
The snap feature functions somewhat like a magnet in the editor. When you are resizing, moving, or creating a frame, this option lets you snap its edges to different display positions—such as the edge of the page, margins, other frames, and the middle of the page vertically or horizontally. You do not need to have indicators—such as margins—turned on in order to use this feature, but it may be helpful to do so.

HOW TO USE THE SNAP FEATURE

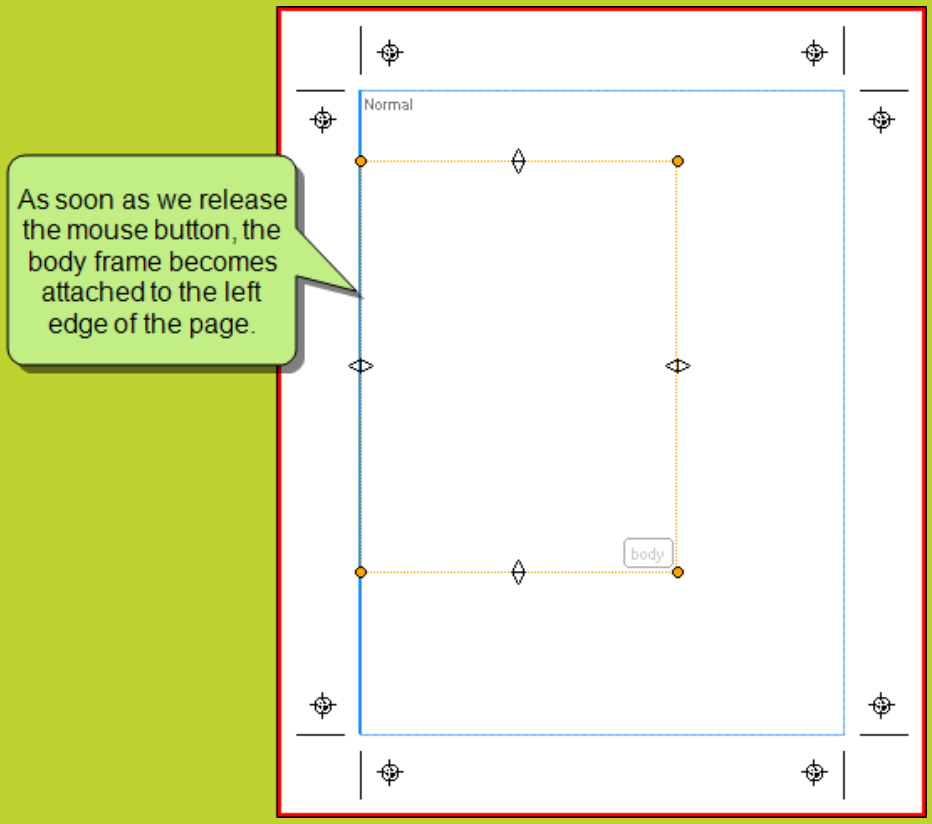
1. Open a page in a page layout.
2. In the local toolbar, make sure that the **Snap** button is enabled.
3. Click in the middle of the frame you want to move and drag it to the desired location. When the frame gets pulled to the appropriate location, release the mouse button.

EXAMPLE—SNAP TO EDGE OF PAGE

In the following example, we've turned on the bleed on for the page. So you can see the edge of the page represented by a dotted rectangle. A smaller dotted rectangle is a body frame that we added.



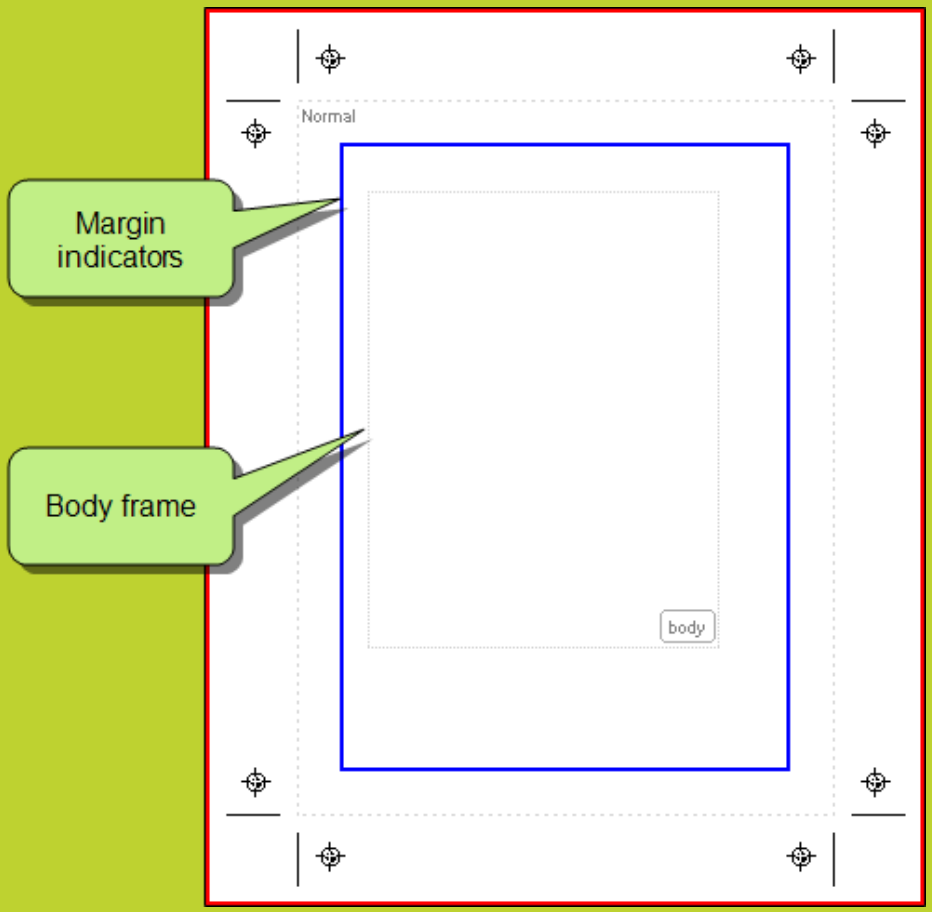
If we want to snap the body frame to the left edge of the page, we click and move the body frame to the left until it seems to be pulled to the edge and a blue line appears.



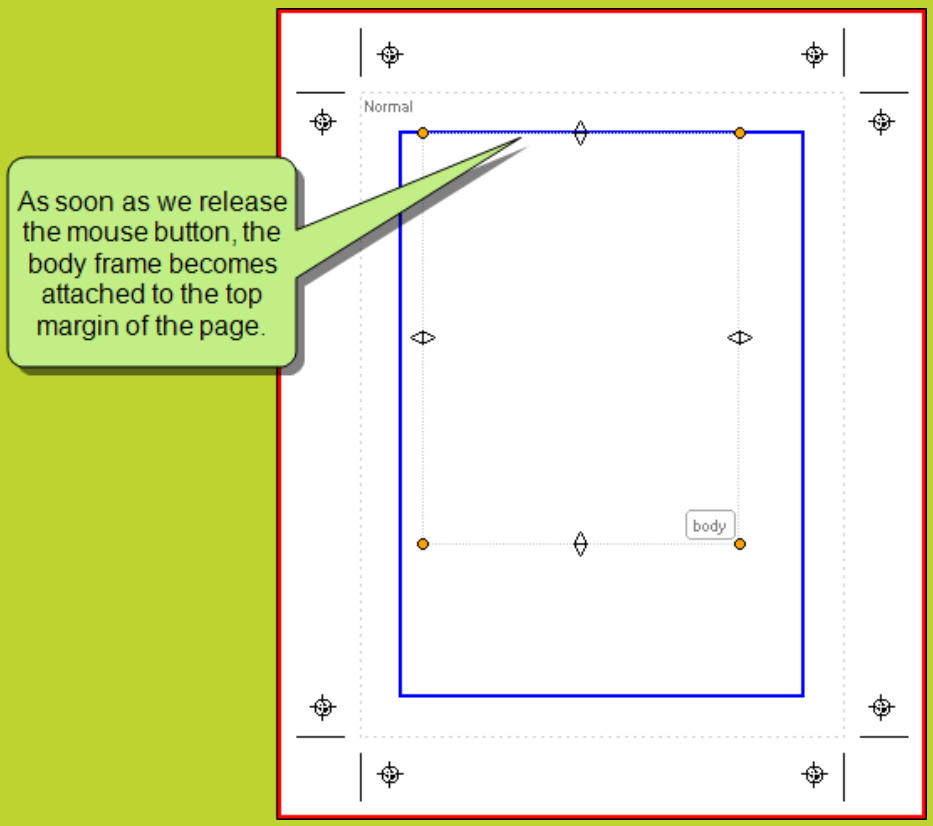
As soon as we release the mouse button, the body frame becomes attached to the left edge of the page.

EXAMPLE—SNAP TO MARGINS

In the following example, we've turned on the margin indicators on for the page. So you can see margins represented by a blue rectangle. A smaller dotted rectangle is a body frame that we added.



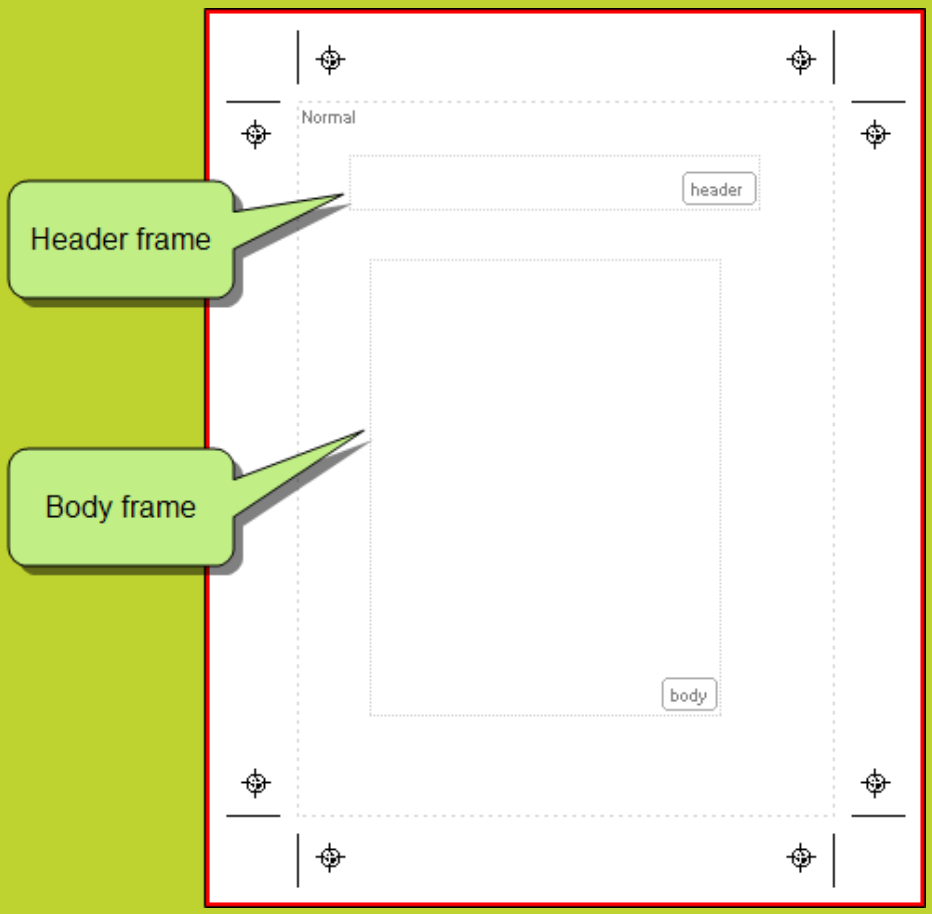
If we want to snap the body frame to the top margin of the page, we click and move the body frame up until it seems to be pulled to the edge.



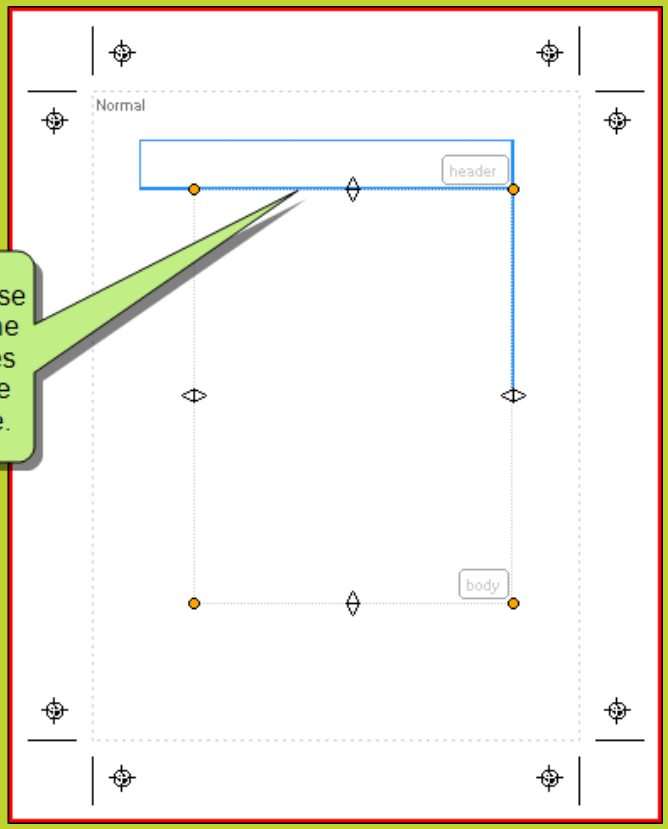
As soon as we release the mouse button, the body frame becomes attached to the top margin of the page.

EXAMPLE—SNAP TO OTHER FRAMES

In the following example, we've added a header frame and a body frame.



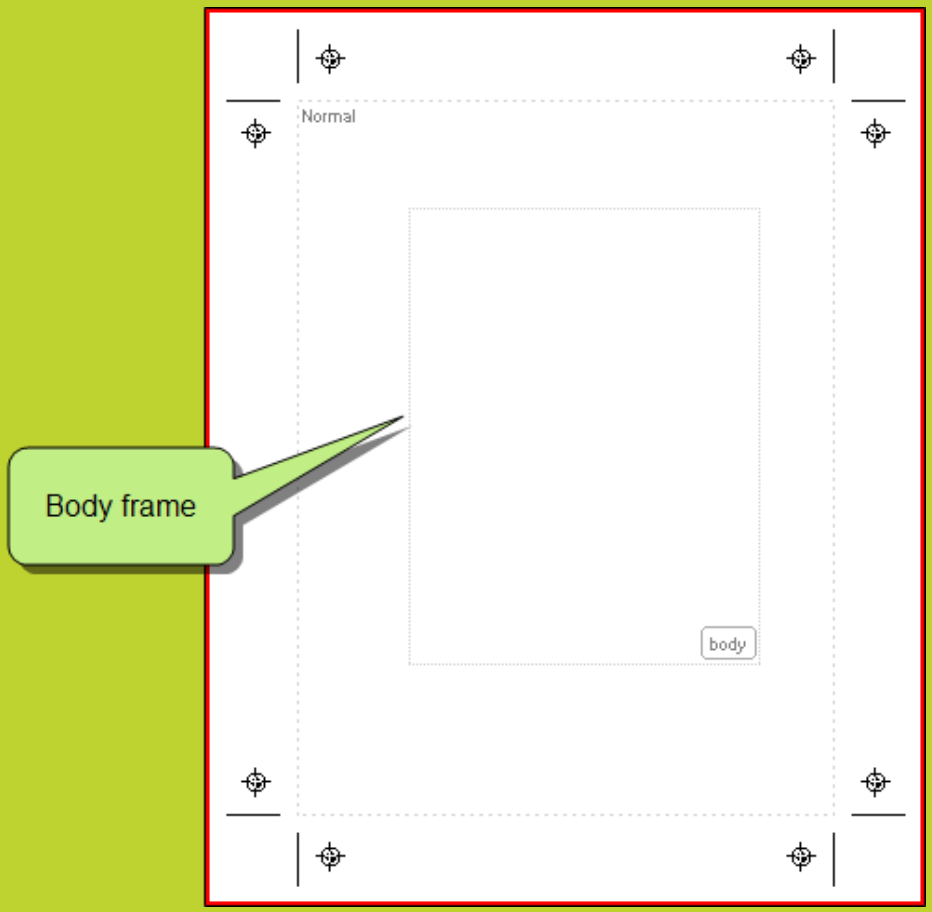
If we want to snap the body frame to the header frame, we click and move the body frame up until it seems to be pulled to the bottom edge of the header frame.



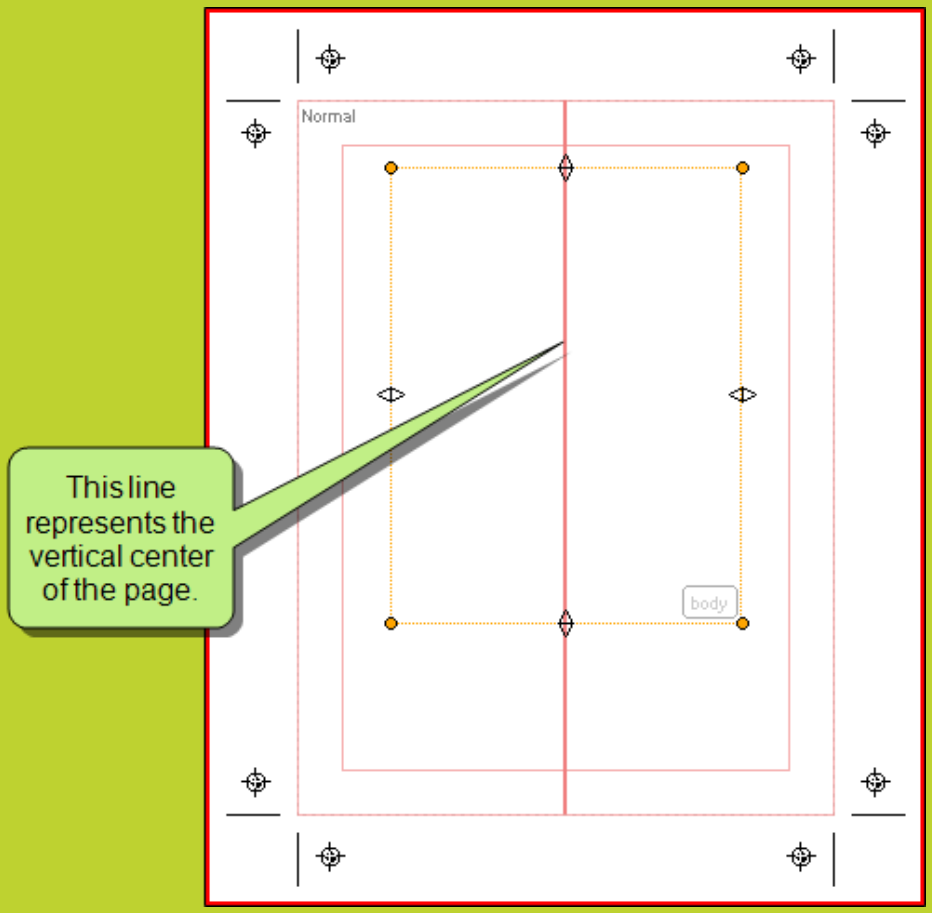
As soon as we release the mouse button, the body frame becomes attached to the edge of the header frame.

EXAMPLE—SNAP TO MIDDLE OF PAGE

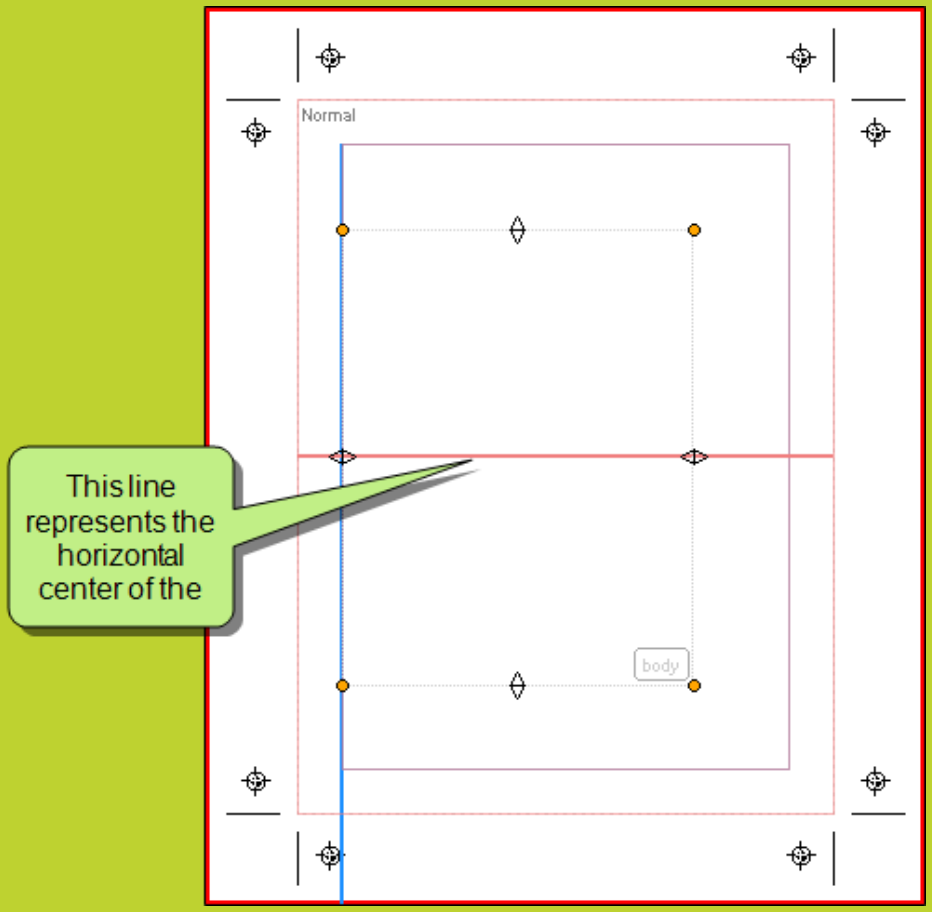
In the following example, we've added a body frame, and we want to position it exactly in the middle of the page.



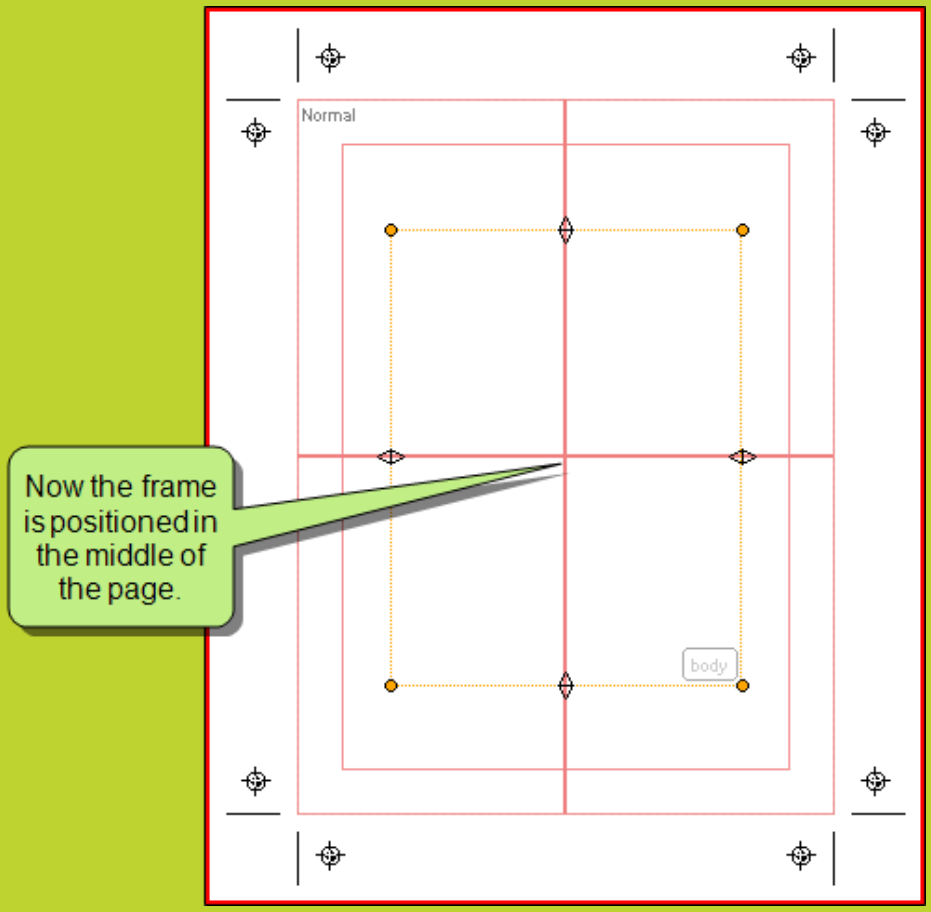
As we move the body frame closer toward the vertical center of the page, a vertical red line appears.



As we move the body frame closer toward the horizontal center of the page, a horizontal red line appears.



As we move the body frame closer toward the actual center of the page, intersecting vertical and horizontal red lines let us know that if we release the mouse button, the frame will be positioned in the middle of the page.



Aligning Page Layout Frames

The Page Layout Editor contains various tools to help you easily keep your frames aligned with each other on a page. For example, after adding a decoration frame to a page, you might want to make sure that its left border is aligned with the left borders of the header and footer frames on the page. This feature is not available for body frames. There are two ways to align frames: (1) in relation to one of the other frames, or (2) on the canvas.

HOW TO ALIGN FRAMES IN RELATION TO ONE OF THE OTHER FRAMES

1. Open a page in a page layout.
2. Select the frame on which you want to base the alignment of the other frames.
3. Hold down the **CTRL** key and click the other frames whose alignment you want to set.

   The handles (small circles) around the edge of the first frame are orange, while the handles around the edge of the other frames are white. This tells you that the frames with the white handles will be changed to match the alignment of the frame with the orange handles.
4. In the local toolbar, click Layout.
5. Select **Make Same**. Then select one of the following options.
   - **Same Left** Horizontally aligns the frames so the left border is at the same location.
   - **Same Right** Horizontally aligns the frames so the right border is at the same location.
   - **Same Top** Vertically aligns the frames so the top border is at the same location.
   - **Same Bottom** Vertically aligns the frames so the bottom border is at the same location.
   - **Same Width** Resizes the width of the selected frames so that they are all the same. The resizing is based on the width of the first frame that you select.
   - **Same Height** Resizes the height of the selected frames so that they are all the same. The resizing is based on the height of the first frame that you select.
   - **Same Size** Resizes the width and height of the selected frames so that they are all the same. The resizing is based on the width and height of the first frame that you select.
   - **Same Center** Vertically aligns the selected frames so that the center of each is at the same location. The alignment is based on the center of the first frame that you select.
   - **Same Middle** Horizontally aligns the selected frames so that the middle of each is at the same location. The alignment is based on the middle of the first frame that you select.
6. Click to save your work.

HOW TO ALIGN FRAMES ON THE CANVAS

1. Open a page in a page layout.
2. Click on the frame(s) that you want to align on the canvas. To select multiple frames, hold down the **CTRL** key and click the frames.
3. In the local toolbar, click Layout.
4. Select **Align on Canvas**. Then select one of the following options.
   - **Center on Canvas** Centers the selected frame(s) both vertically and horizontally on the canvas.
   - **Vertically Center on Canvas** Centers the selected frame(s) vertically on the canvas.
   - **Horizontally Center on Canvas** Centers the selected frame(s) horizontally on the canvas.
5. Click to save your work.

Aligning Text in Frames

You can easily align text and content in a frame both vertically and horizontally. This can be done from the Layout drop-down in the Page Layout Editor or from the Alignment tab in the Frame Properties dialog.

HOW TO ALIGN FRAME TEXT

1. Open a page in a page layout.
2. Select the frame whose text you want to align.

> **Note:** You can do this only for header, footer, or decoration frames. You cannot align text in body frames.

3. Do one of the following:
   - In the local toolbar, click Layout. Then select **Vertically Align** or **Align**, depending on whether you want to align the text vertically or horizontally.
   - Double-click the frame. In the Frame Properties dialog, select the **Alignment** tab.
4. Select one of the alignment options.

   HORIZONTAL ALIGNMENT

   - **Left** Aligns the text horizontally along the left edge of the frame.
   - **Center** Aligns the text horizontally at the center point of the frame.
   - **Right** Aligns the text horizontally along the right edge of the frame.
   - **Justify** Spaces the text in the frame so that both the left and right sides are aligned.
   - **Default** Resets the alignment of the text in the frame to the default (inherited) setting.

   VERTICAL ALIGNMENT

   - **Top** Aligns the text vertically along the top edge of the frame.
   - **Middle** Aligns the text vertically at the middle point of the frame
   - **Bottom** Aligns the text vertically along the bottom edge of the frame.
5. If you have opened the Frame Properties dialog, click **OK**.
6. Click to save your work.

Note: If you set the alignment of text on a frame, it will take precedence over the style of paragraphs inside the frame.

Creating Columns

You can easily add and configure columns in any frame of a page layout.

HOW TO CREATE COLUMNS

1. Open a page in a page layout.
2. Double-click the frame for which you want to add or configure columns.
3. Select the **Columns** tab.
4. Set any of the options on the tab for the columns or the divider.

   COLUMNS

   - **Count** Enter the number of columns to be used in the frame to display text.
   - **Gap** Enter the amount of space that you want between each column. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.

   COLUMN DIVIDER

   - **Style** Select the type of vertical line that you would like to display between columns (either a solid or double line). If you do not select a style, the gap between the columns will be empty.
   - **Width** Specify the width of the single solid line or the double lines that serve as the column divider. In the lower-left field, enter the value. In the lower-right field, click the down arrow and select the unit of measurement.
   - **Margin Top** Specify the amount of space between the top of the column divider and the top edge of the frame. In the lower-left field, enter the value. In the lower-right field, click the down arrow and select the unit of measurement.
   - **Margin Bottom** Specify the amount of space between the bottom of the column divider and the bottom edge of the frame. In the lower-left field, enter the value. In the lower-right field, click the down arrow and select the unit of measurement.
   - **Color** Use this field to apply a color to the column divider. Click the down arrow and select a color from the popup. For advanced color options, select **More Colors** and use the fields in the Color Picker dialog.
5. Click **OK**.
6. Click to save your work.

Exporting Frame Text

If you add content to a frame and then later want to reuse it in future frames, you can export that content. It will be converted to a snippet and become available when you pick content for a frame (in the same way that you insert a page number). When you export the text, you simply need to save it in the appropriate location on your computer where MadCap templates are stored.

HOW TO EXPORT FRAME TEXT

1. Make sure you have created a templates folder. When you create a templates folder using the Template Manager, all of the regular template subfolders are created for you, including one named "FrameSnippets," which is the subfolder that will hold your frame snippets.
2. In Flare open a page in a page layout.
3. Right-click on the frame with the content that you want to export, and select **Export Text**.

   The Export Frame Text dialog opens.

   > **Note:** You can export content only from header, footer, and decoration frames. You cannot export content from a body frame (which automatically displays content from your topics).

4. Select a template folder to hold the new snippet.

   > **Note:** You can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

5. In the **Template Name** field, provide a name for the snippet template file.
6. In the Export Frame Text dialog, click **OK**.
7. Click to save your work.

Floating and Sinking Frames

When you add a frame to a page, it is placed on its own layer. And each time you add a new frame, it is placed on the top layer with the previous frames on layers beneath it. If necessary (when frames overlap one another), you can "float" frames that are on lower layers to bring them forward, and you can "sink" frames to send them backward.

HOW TO FLOAT OR SINK FRAMES

1. Open a page in a page layout.
2. Click on the frame that you want to float (bring forward) or sink (send backward).
3. In the local toolbar, click Layout.
4. From the drop-down menu, select **Depth** and choose one of the following.
   - **Float** Floats the selected frame, bringing it forward one level if at least one other frame overlaps it (above it).
   - **Sink** Sinks the selected frame, sending it backward one level if at least one other frame overlaps it (below it).
   - **Sink To Bottom** Sinks the selected frame, sending it backward to the bottom level if at least one other frame overlaps it (below it).
   - **Float To Top** Floats the selected frame, bringing it forward to the top level if at least one other frame overlaps it (above it).
5. Click to save your work.

Chap/Sec/Vol Variables in Frames

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

For Adobe PDF, Microsoft XPS, and XHTML output, you can insert variables in page layout frames that display your chapter, section, or volume numbers (if you are using autonumbers to identify the various parts of a manual).

HOW TO INSERT A CHAPTER, SECTION, OR VOLUME NUMBER VARIABLE INTO A PAGE LAYOUT FRAME

1. Open a page in a page layout.
2. Click on the frame to which you want to add text or other content.

   Note: You can add text and content only to header, footer, and decoration frames. You cannot add text and content to a body frame (which automatically displays content from your topics). You can use image frames to insert images that use all of the space in the frame.

3. Do one of the following, depending on the part of the user interface you are using:
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** Press **F2** on your keyboard.
   - **Right-click** Right-click the frame and select **Edit Text**.

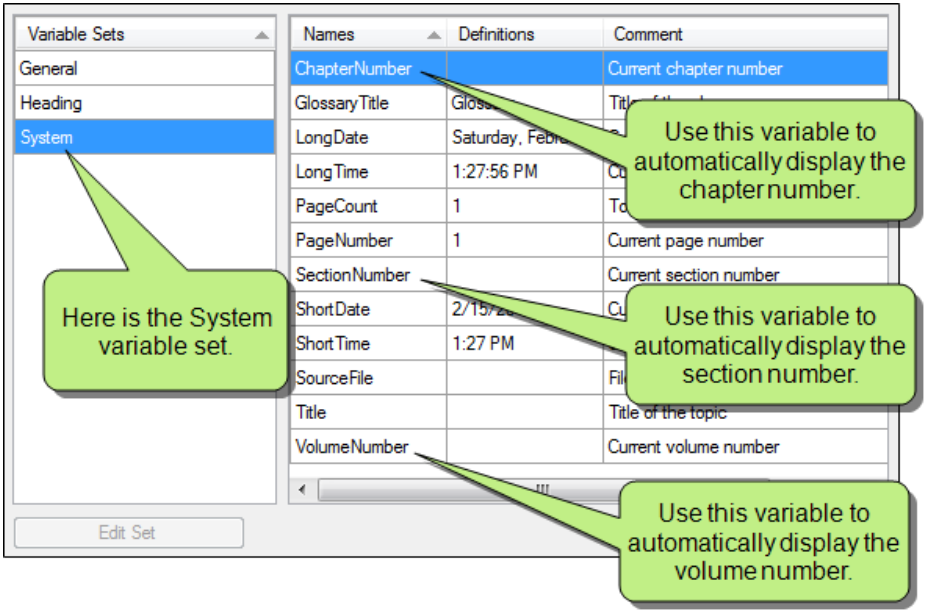
   A message opens, asking if you want to pick content from a template (e.g., a page number).
4. Click **No**. The Frame Contents window pane opens.

   Note: If you have already prepared content in the form of a snippet and added it to your template folder, you can click "Yes" instead in order to select the snippet. For more information about templates, see the online Help.

5. Click in the Frame Contents window pane.

6. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single-Source** section select **Variable**.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** On your keyboard press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.
7. Select the **System** variable set.
8. Select the appropriate variable: **ChapterNumber**, **SectionNumber**, or **VolumeNumber**.



9. Click **OK**. The variable is added to the Frame Contents window pane.
10. Click to save your work. The variable can now be seen in the frame.

RELATED TASKS

In addition to completing the these steps, make sure you also perform the necessary tasks for creating the autonumbers in your topics and specifying where new chapters, sections, or volumes should begin.

- To generate **chapter** numbers, you need to create an autonumber format that includes the {chapnum} command (see "Autonumbers" on page 252). Then you need to specify chapter breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542).
- To generate **section** numbers, you need to create an autonumber format that includes the {secnum} command (see "Autonumbers" on page 252). Then specify section breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542).
- To generate **volume** numbers, you need to create an autonumber format that includes the {volnum} command (see "Autonumbers" on page 252). Second, you need to specify chapter breaks in the outline TOC (see "Specifying Chapter and Page Layout Breaks" on page 542). Third, you need to specify the autonumber flow for each volume, resetting the volume number to a specific number (see "Autonumbering Flow for Output" on page 556).

Inserting Heading Variables Into Frames

You can insert Heading variables into page layouts or master pages in order to automatically display text based on the <h1> through <h6> heading styles that you use in your project. Like Running Head variables, they are useful when creating print-based output. It's an easy way, for example, to automatically display a chapter title in the header of a chapter. For Adobe PDF, Microsoft XPS, and XHTML output, you can also use Heading variables to automatically display glossary headings/terms and index headings/terms in a page layout frame. See "Heading Variables" on page 219.

Heading variables are very similar to Running Head variables. The key appeal of Running Head variables is that they are supported in FrameMaker and help with the transition of authors from FrameMaker to Flare. So people who are familiar with FrameMaker might prefer to use Running Head variables because they are used to them. However, Heading variables are somewhat easier to use and therefore are recommended for people who do not have a FrameMaker background.

Following are steps for inserting a Heading variable into a page layout frame.

HOW TO INSERT A HEADING VARIABLE INTO A PAGE LAYOUT FRAME

1. Open a page in a page layout.
2. Click on the frame to which you want to add text or other content.

   Note: You can add text and content only to header, footer, and decoration frames. You cannot add text and content to a body frame (which automatically displays content from your topics). You can use image frames to insert images that use all of the space in the frame.

3. Do one of the following, depending on the part of the user interface you are using:
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** Press **F2** on your keyboard.
   - **Right-click** Right-click the frame and select **Edit Text**.

   A message opens, asking if you want to pick content from a template (e.g., a page number).
4. Click **No**. The Frame Contents window pane opens.

   Note: If you have already prepared content in the form of a snippet and added it to your template folder, you can click "Yes" instead in order to select the snippet. For more information about templates, see the online Help.

5. Click in the Frame Contents window pane.

6. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single-Source** section select **Variable**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** On your keyboard press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.
7. Select the **Heading** variable set.
8. Select the variable you want to add. Much of the information that follows pertains to projects and are primarily for the authors of those projects.
   - **AnyLevel** Automatically displays the text in the first heading on a page that uses any of the <h1> through <h6> styles.
   - **FirstGlossaryPageHeading** Automatically displays the first glossary heading (e.g., A, B, C, D, E) that occurs on a page with a generated glossary. In order for this variable to work, it must be inserted in a page layout that is used for the topic where a glossary proxy is inserted. In addition, you must specify in the outline TOC that your glossary topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.

E X A M P L E

Let's say that you want to include a generated glossary in a PDF manual. So you create a simple topic called "MyGlossary" and insert a glossary proxy into it. Then you add that topic to the outline TOC that is being used to produce the manual.

Next, you open the page layout that you want to use for the topic holding that glossary proxy. Let's call it "GlossaryPL." Suppose you open the page in that layout that will be used for all left-hand pages in the output. In the header frame, you insert the "FirstGlossaryPageHeading" variable. Perhaps you want to show the complete range of glossary headings on each page. So you type the word "through" and also insert the "LastGlossaryPageHeading" variable. Therefore, you would have something like this in the frame:

FirstGlossaryPageHeading: through LastGlossaryPageHeading:

Next, in the outline TOC, you create a chapter break on the entry linked to the topic holding the glossary proxy. When doing this, you specify that the entry should use the "GlossaryPL" page layout.

Now you generate the PDF. You scroll down to the first left-handed page showing the generated glossary. Let's say the first glossary heading you see on the page is **F**, with all of the terms beginning with the letter "f" following it. Toward the bottom of that page, you see the glossary heading **H**, and terms starting with the letter "h" are listed below it. In that case, when you look to the very top of the page, you will see this:

F through H

» **FirstGlossaryPageTerm** Automatically displays the first glossary term (e.g., Ants, Bugs, Cats, Dogs, Elephants) that occurs on a page with a generated glossary. In order for this variable to work, it must be inserted in a page layout that is used for the topic where a glossary proxy is inserted. In addition, you must specify in the outline TOC that your glossary topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.

E X A M P L E

Let's say that you want to include a generated glossary in a PDF manual. So you create a simple topic called "MyGlossary" and insert a glossary proxy into it. Then you add that topic to the outline TOC that is being used to produce the manual.

Next, you open the page layout that you want to use for the topic holding that glossary proxy. Let's call it "GlossaryPL." Suppose you open the page in that layout that will be used for all left-hand pages in the output. In the header frame, you insert the "FirstGlossaryPageTerm" variable. Perhaps you want to show the complete range of glossary terms on each page. So you type the word "through" and also insert the "LastGlossaryPageTerm" variable. In addition, you type quotation marks around each of the variables so that the terms will stand out in the output. Therefore, you would have something like this in the frame:

" FirstGlossaryPageTerm: " through " LastGlossaryPageTerm: "

Next, in the outline TOC, you create a chapter break on the entry linked to the topic holding the glossary proxy. When doing this, you specify that the entry should use the "GlossaryPL" page layout.

Now you generate the PDF. You scroll down to the first left-handed page showing the generated glossary. Let's say the first glossary term you see on the page is **Moose**. The last term on the page is **Sharks**. In that case, when you look to the very top of the page, you will see this:

"Moose" through "Sharks"

» **FirstIndexHeading** Automatically displays the first index heading (e.g., A, B, C, D, E) that occurs on a page with a generated index. In order for this variable to work, it must be inserted in a page layout that is used for the topic where an index proxy is inserted. In addition, you must specify in the outline TOC that your index topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.

E X A M P L E

Let's say that you want to include a generated index in a PDF manual. So you create a simple topic called "MyIndex" and insert an index proxy into it. Then you add that topic to the outline TOC that is being used to produce the manual.

Next, you open the page layout that you want to use for the topic holding that index proxy. Let's call it "IndexPL." Suppose you open the page in that layout that will be used for all left-hand pages in the output. In the header frame, you insert the "FirstIndexHeading" variable. Perhaps you want to show the complete range of index headings on each page. So you type the word "through" and also insert the "LastIndexHeading" variable. Therefore, you would have something like this in the frame:

FirstIndexHeading: through LastIndexHeading:

Next, in the outline TOC, you create a chapter break on the entry linked to the topic holding the index proxy. When doing this, you specify that the entry should use the "IndexPL" page layout.

Now you generate the PDF. You scroll down to the first left-handed page showing the generated index. Let's say the first index heading you see on the page is **C**, with all of the index entries beginning with the letter "c" following it. Toward the bottom of that page, you see the glossary heading **J**, and index entries starting with the letter "j" are listed below it. In that case, when you look to the very top of the page, you will see this:

C through J

» **FirstIndexTerm** Automatically displays the first index term (e.g., Ants, Bugs, Cats, Dogs, Elephants) that occurs on a page with a generated index. In order for this variable to work, it must be inserted in a page layout that is used for the topic where an index proxy is inserted. In addition, you must specify in the outline TOC that your index topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.

E X A M P L E

Let's say that you want to include a generated index in a PDF manual. So you create a simple topic called "MyIndex" and insert an index proxy into it. Then you add that topic to the outline TOC that is being used to produce the manual.

Next, you open the page layout that you want to use for the topic holding that index proxy. Let's call it "IndexPL." Suppose you open the page in that layout that will be used for all left-hand pages in the output. In the header frame, you insert the "FirstIndexTerm" variable. Perhaps you want to show the complete range of index terms on each page. So you type the word "through" and also insert the "LastIndexTerm" variable. In addition, you type quotation marks around each of the variables so that the terms will stand out in the output. Therefore, you would have something like this in the frame:

"FirstIndexTerm:" through "LastIndexTerm:"

Next, in the outline TOC, you create a chapter break on the entry linked to the topic holding the index proxy. When doing this, you specify that the entry should use the "IndexPL" page layout.

Now you generate the PDF. You scroll down to the first left-handed page showing the generated index. Let's say the first index term you see on the page is **Moose**. The last term on the page is **Sharks**. In that case, when you look to the very top of the page, you will see this:

"Moose" through "Sharks"

- **LastGlossaryPageHeading** Automatically displays the last glossary heading (e.g., U, V, W, X, Y, Z) that occurs on a page with a generated glossary. In order for this variable to work, it must be inserted in a page layout that is used for the topic where a glossary proxy is inserted. In addition, you must specify in the outline TOC that your glossary topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.
- **LastGlossaryPageTerm** Automatically displays the last glossary term (e.g., Sharks, Tigers, Wombats, Zebras) that occurs on a page with a generated glossary. In order for this variable to work, it must be inserted in a page layout that is used for the topic where a glossary proxy is inserted. In addition, you must specify in the outline TOC that your glossary topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.
- **LastIndexHeading** Automatically displays the last index heading (e.g., U, V, W, X, Y, Z) that occurs on a page with a generated index. In order for this variable to work, it must be inserted in a page layout that is used for the topic where an index proxy is inserted. In addition, you must specify in the outline TOC that your index topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.
- **LastIndexTerm** Automatically displays the last index term (e.g., Sharks, Tigers, Wombats, Zebras) that occurs on a page with a generated index. In order for this variable to work, it must be inserted in a page layout that is used for the topic where an index proxy is inserted. In addition, you must specify in the outline TOC that your index topic is using the page layout where you have inserted this variable. The option is available only with Adobe PDF, Microsoft XPS, or XHTML output.
- **Level1** Automatically displays the text in the first heading on a page that uses the <h1> style tag.

> **EXAMPLE**
>
> Let's say you are using the <h1> style tag only for your chapter titles at the beginning of each chapter. If you insert the Heading.Level1 variable into the heading frames in the page layout that you are using for chapters, the appropriate chapter title will display automatically at the top of each chapter in the output.

- **Level2** Automatically displays the text in the first heading on a page that uses the <h2> style tag.
- **Level3** Automatically displays the text in the first heading on a page that uses the <h3> style tag.
- **Level4** Automatically displays the text in the first heading on a page that uses the <h4> style tag.
- **Level5** Automatically displays the text in the first heading on a page that uses the <h5> style tag.
- **Level6** Automatically displays the text in the first heading on a page that uses the <h6> style tag.

9. Click **OK**. The variable is added to the Frame Contents window pane.
10. Click to save your work. The variable can now be seen in the frame.

Inserting Running Head Variables into Frames

If you want certain content to be inserted into a frame automatically (rather than typing the text manually), you can use a Running Head variable. For example, you might want to automatically include the first <h1> heading of each chapter into the header for certain pages. By using a Running Head variable, you can use just one page layout for all of your chapters, rather than having to create a new page layout for each chapter. See "Running Head Variables" on page 221.

Heading variables are very similar to Running Head variables. The key appeal of Running Head variables is that they are supported in FrameMaker and help with the transition of authors from FrameMaker to Flare. So people who are familiar with FrameMaker might prefer to use Running Head variables because they are used to them. However, Heading variables are somewhat easier to use and therefore are recommended for people who do not have a FrameMaker background.

HOW TO INSERT A RUNNING HEAD VARIABLE INTO A PAGE LAYOUT FRAME

1. Add a variable set to the project, selecting the Running HF template. See "Adding Variable Sets to Projects" on page 214.
2. Open a page in a page layout.
3. Click on the frame to which you want to add text or other content.

   Note: You can add text and content only to header, footer, and decoration frames. You cannot add text and content to a body frame (which automatically displays content from your topics).

4. Do one of the following, depending on the part of the user interface you are using:
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** Press **F2** on your keyboard.
   - **Right-Click** Right-click the frame and select **Edit Text**.

   A message opens, asking if you want to pick content from a template (e.g., a page number).
5. Click **No**.

   Note: If you have already prepared content in the form of a snippet and added it to your template folder, you can click "Yes" instead in order to select the snippet. For more information about templates, see the online Help.

6. Click in the Frame Contents window pane.

7. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single Source** section select **Variable**.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** Press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.
8. On the left side of the dialog, select the Running Head variable set that you created.
9. On the right side of the dialog, select the variable that you want to insert. Unless you edit the variable definitions to change the style classes within them, each variable is associated with one of the six heading styles (<h1> through <h6>).

   When you insert a Running Head variable into a page layout frame, Flare will insert the text from the first occurrence of the specified style on that page. If it doesn't find any text using that style, it will use the text from the previous occurrence of that style.

   E X A M P L E

   If you want the header in chapters to display content that is using the <h1> style (perhaps you are using this style to display the chapter title for your output), select the **Running H/F 1** variable. The header will then display the first <h1> content that it finds in the document (e.g., "My First Chapter Title"). When the next occurrence of the <h1> style appears on another page, the heading changes to display that text (e.g., "My Second Chapter Title"), and so on.
10. Click **OK**. The variable is added to the Frame Contents window pane.
11. Click to save your work. The variable can now be seen in the frame.

Inserting Page Numbers into Frames

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

One type of content that you are likely to add to a frame is a page number, which is actually a snippet that serves as a placeholder for a page number in the output.

HOW TO INSERT A PAGE NUMBER INTO A FRAME

1. Open a page in a page layout.
2. Click on the frame to which you want to add a page number.

   Note: You can insert a page number only into header, footer, and decoration frames. You cannot insert a page number into a body frame (which automatically displays content from your topics).

3. Do one of the following, depending on the part of the user interface you are using:
   - **Local Toolbar** In the local toolbar, click .
   - **Right-Click** Right-click the frame and select **Select Frame Text**.

   The Select Frame Text dialog opens.

4. In the **Template Folders** section, select a template.

   Note: You can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

5. In the **Templates** section, select one of the page number snippets.
   - **- page -.flsnp** Displays a page number surrounded by dashes (e.g., - 53 -).
   - **page (pagecount).flsnp** Displays the current page number, followed by the total number of pages in parentheses.
   - **Page n of N.flsnp** Displays the current page number and the total number of pages in the document (e.g., Page 13 of 70).

> **Tip:** If you want to change the look of the page number (e.g., remove the dashes or parentheses), you can do so easily. To edit the text or content around a page number, continue inserting the page snippet as it is. After it is added to the frame, click on the frame and press F2. In the Frame Contents window pane, you can modify it as necessary.

6. Click **OK**.
7. Click to save your work.

Removing Page Layout Frames

Just as you can add new frames to a page as necessary, you can remove existing frames as well.

HOW TO REMOVE A FRAME

1. Open a page in a page layout.
2. Click on the frame that you want to remove.
3. On your keyboard press **Delete**.
4. Click to save your work.

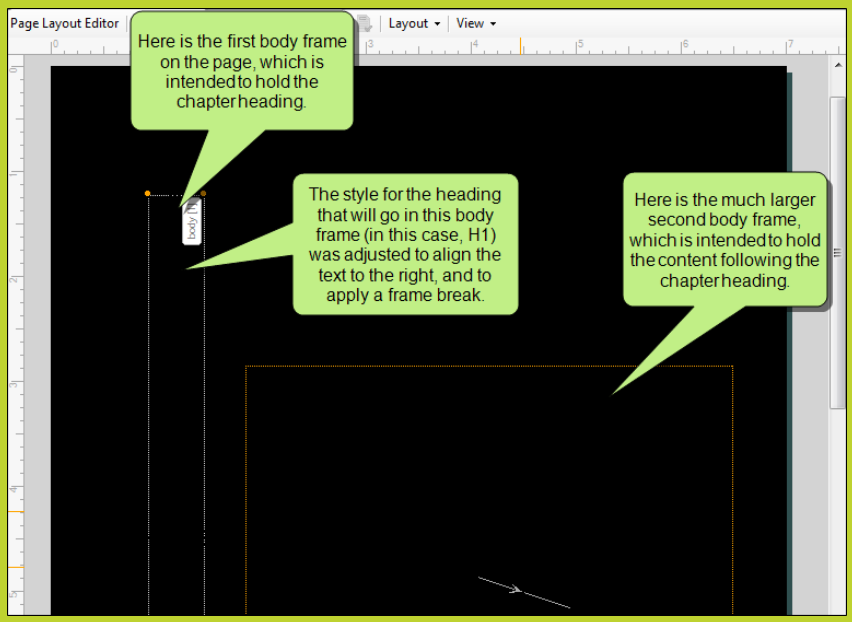
Rotating Frames

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

From time to time, you may find that you need to rotate a frame on a page. For example, you might want to rotate a decoration frame so that the text reads sideways, as opposed to left-to-right. Or you might want to rotate body frames so that content flows from a vertical frame to a horizontal frame. This feature can be used in conjunction with frame breaks to ensure that only certain text displays in the rotated body frame. See "Setting Frame Breaks on Paragraphs and Headings" on page 458.

E X A M P L E

You might design a page layout so that the first frame is rotated and holds the chapter heading. With a frame break on that heading, the text that follows it (the main body) displays in the second frame, which is not rotated. In the Page Layout Editor, it might look something like this:



In the output, it might look something like this:

CHAPTER 1: Welcome

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

This chapter discusses the following.

Headings 6
More Headings 7

HOW TO ROTATE A FRAME

1. Open a page in a page layout.
2. Do one of the following:
   - Click on the frame that you want to rotate. In the local toolbar, click Layout and from the drop-down, select **Rotate**.
   - Right-click on the frame that you want to rotate. From the context menu select **Rotate**.
3. Choose one of the options in the submenu.
   - **Rotate Clockwise** Turns the frame 1 degree clockwise.
   - **Rotate 45 Clockwise** Turns the frame 45 degrees clockwise.
   - **Rotate 90 Clockwise** Turns the frame 90 degrees clockwise.
   - **Rotate Counter Clockwise** Turns the frame 1 degree counter clockwise.
   - **Rotate 45 Counter Clockwise** Turns the frame 45 degrees counter clockwise.
   - **Rotate 90 Clockwise** Turns the frame 90 degrees counter clockwise.
   - **Reset Rotation** Returns the frame to its original setting before it was rotated.
4. Click to save your work.

Setting Frame Anchors

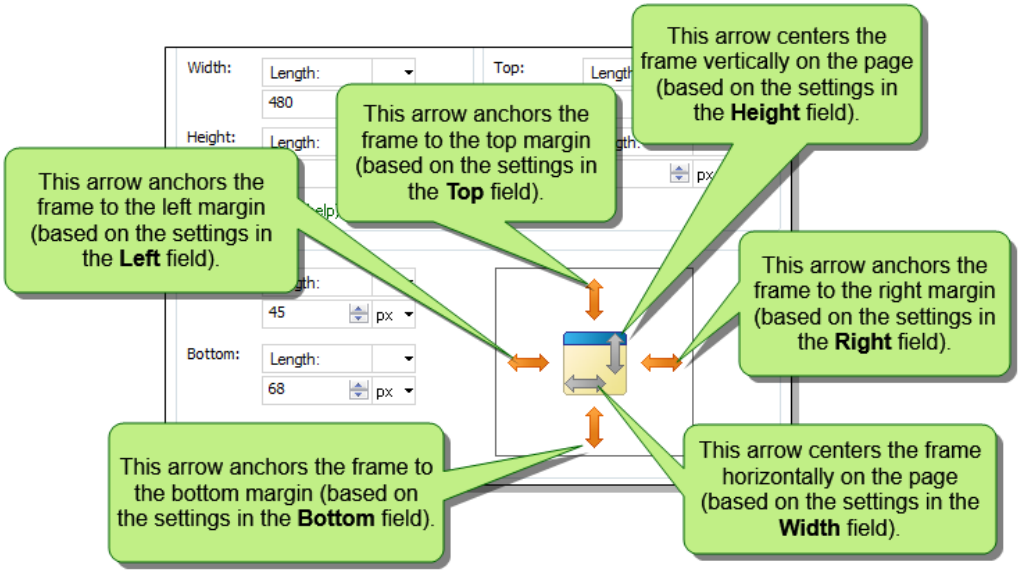
You can set anchors in a frame. Anchors allow you to lock the frame to the margins on the page. If a page size changes, the frame is resized accordingly.

HOW TO SET FRAME ANCHORS

1. Open a page in a page layout.
2. Make sure you have set the margins for the page. See "Specifying Page Margins" on page 369.
3. Double-click on the frame that you want to anchor. The Frame Properties dialog opens.
4. Select the **Frame** tab.
5. Make sure you have specified the size and position of the frame by using the **Left**, **Top**, **Width**, **Height**, **Right**, and **Bottom** fields. See "Specifying Frame Size" on page 490.
6. Click the appropriate anchors (the arrows shown on the Frame tab). The arrows on the outside of the box are used to anchor the frame to the top, bottom, left, or right margins on the page. The arrows inside the box are used to center the frame horizontally and vertically on the frame. To set an anchor, click the appropriate arrow so that it is no longer gray.

> **Note:** If you select the inside arrow to center the frame horizontally, the left and right anchors are disabled. Likewise, if you select the inside arrow to center the frame vertically, the top and bottom anchors are disabled.

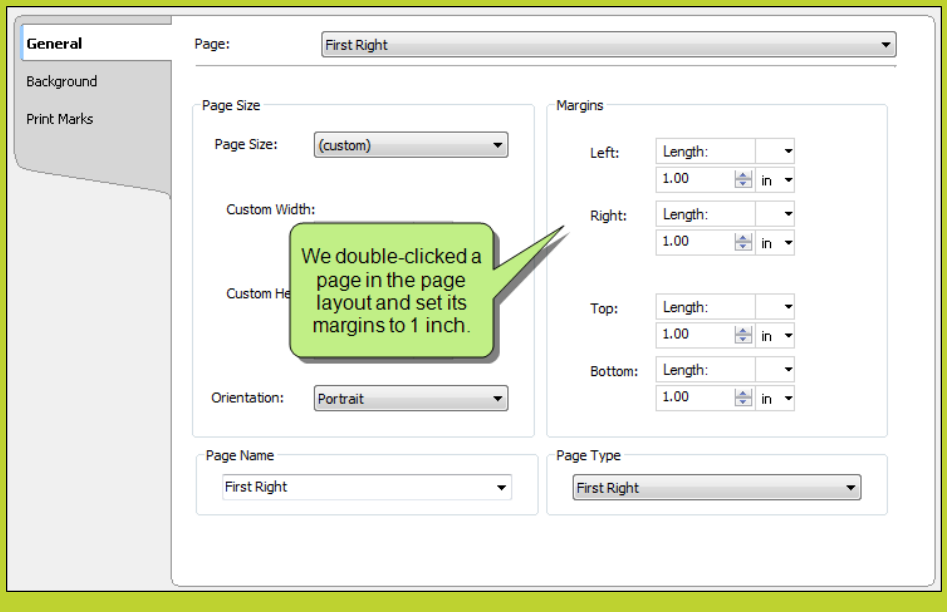
> **Note:** You can also enable or disable anchors by right-clicking the frame in the page layout, selecting **Anchors** from the context menu, and choosing the options you want.


Width:
Length:
480
Top:
Height:
Length:
45
px
Bottom:
Length:
68
px
This arrow centers the frame vertically on the page (based on the settings in the **Height** field).
This arrow anchors the frame to the top margin (based on the settings in the **Top** field).
This arrow anchors the frame to the left margin (based on the settings in the **Left** field).
This arrow anchors the frame to the right margin (based on the settings in the **Right** field).
This arrow anchors the frame to the bottom margin (based on the settings in the **Bottom** field).
This arrow centers the frame horizontally on the page (based on the settings in the **Width** field).

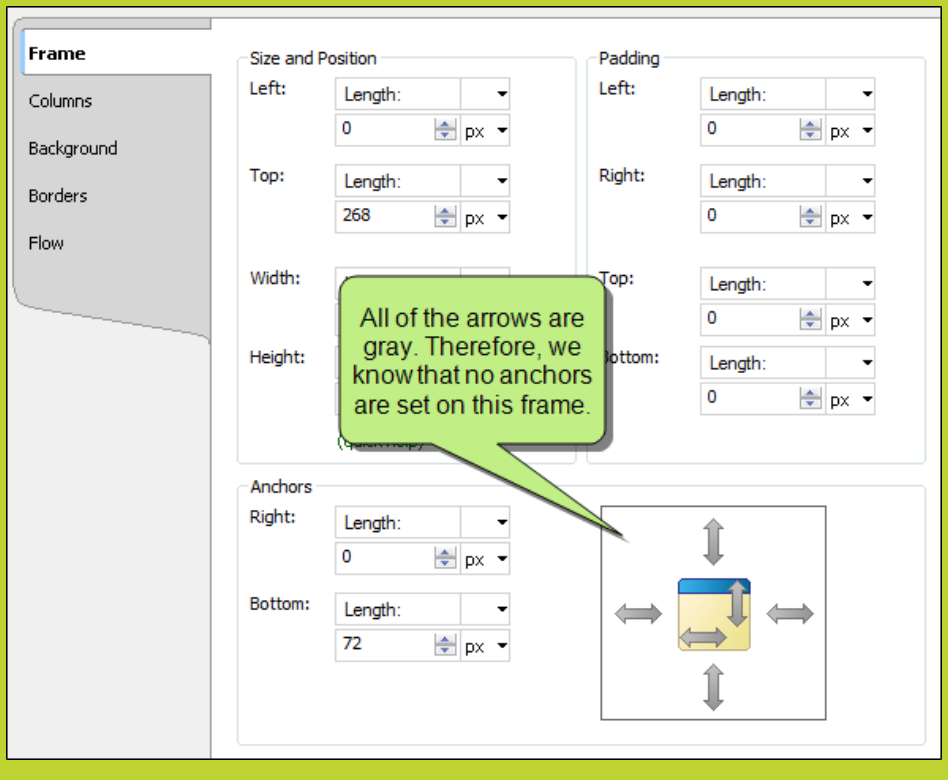
E X A M P L E

Let's say you are generating a PDF manual, and you are initially told that the size of the manual should be 8.5 inches wide by 11 inches high.

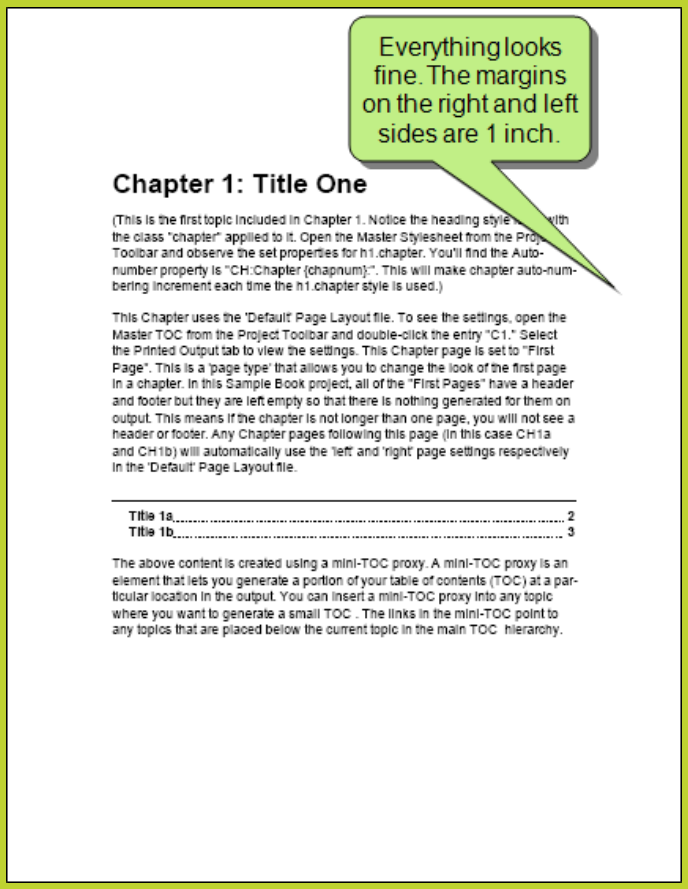
On the pages to be used for the main chapter content, you have set 1-inch margins.



Now suppose that you do not set any anchors on the body frame for that page:



When you generate the PDF output, it looks like this:



Everything looks fine. The margins on the right and left sides are 1 inch.

Chapter 1: Title One

(This is the first topic included in Chapter 1. Notice the heading style is with the class "chapter" applied to it. Open the Master Stylesheet from the Project Toolbar and observe the set properties for h1.chapter. You'll find the Auto-number property is "CH:Chapter {chapnum}:". This will make chapter auto-numbering increment each time the h1.chapter style is used.)

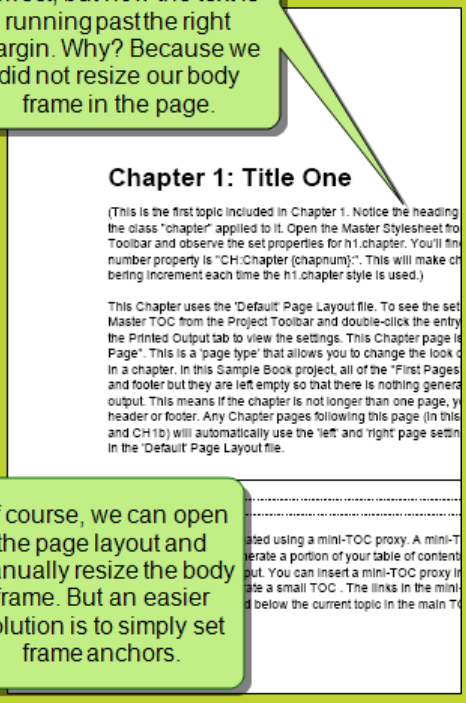
This Chapter uses the 'Default' Page Layout file. To see the settings, open the Master TOC from the Project Toolbar and double-click the entry "C1." Select the Printed Output tab to view the settings. This Chapter page is set to "First Page". This is a 'page type' that allows you to change the look of the first page in a chapter. In this Sample Book project, all of the "First Pages" have a header and footer but they are left empty so that there is nothing generated for them on output. This means if the chapter is not longer than one page, you will not see a header or footer. Any Chapter pages following this page (in this case CH1a and CH1b) will automatically use the 'left' and 'right' page settings respectively in the 'Default' Page Layout file.

Title 1a 2
Title 1b 3

The above content is created using a mini-TOC proxy. A mini-TOC proxy is an element that lets you generate a portion of your table of contents (TOC) at a particular location in the output. You can insert a mini-TOC proxy into any topic where you want to generate a small TOC . The links in the mini-TOC point to any topics that are placed below the current topic in the main TOC hierarchy.

However, let's say you are then told that the page size needs to be changed to 6 inches by 9 inches. Therefore, you make the change. But when you generate the PDF output, it looks like this:

The page dimensions are correct, but now the text is running past the right margin. Why? Because we did not resize our body frame in the page.



Chapter 1: Title One

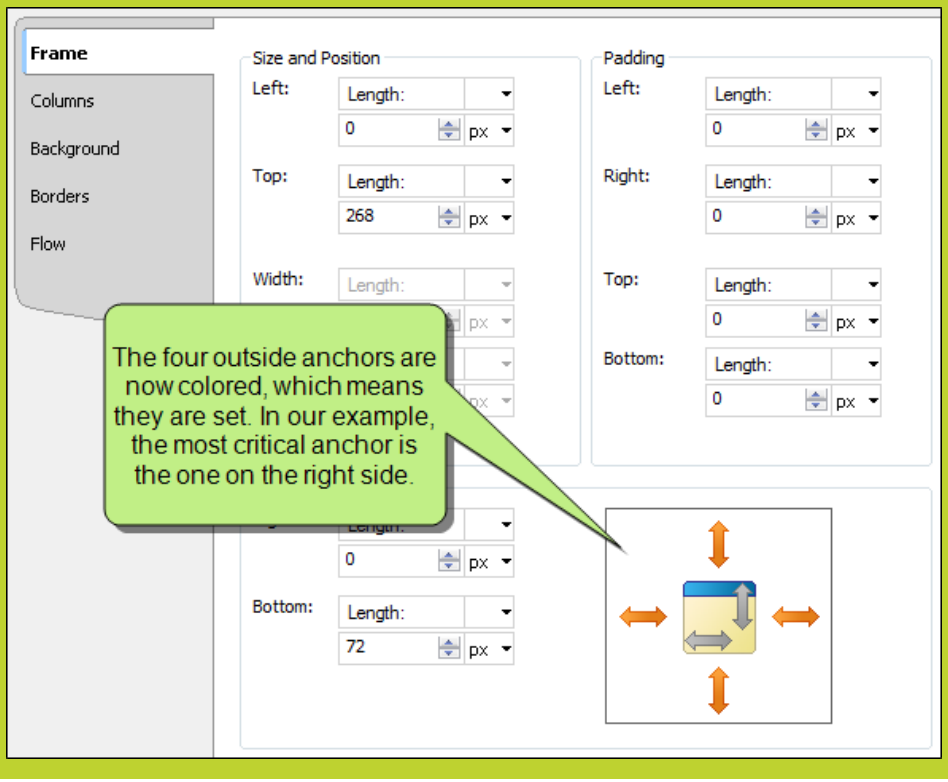
(This is the first topic included in Chapter 1. Notice the heading
the class "chapter" applied to it. Open the Master Stylesheet fro
Toolbar and observe the set properties for h1.chapter. You'll fin
number property is "CH:Chapter {chapnum}:". This will make ch
bering increment each time the h1.chapter style is used.)

This Chapter uses the 'Default' Page Layout file. To see the set
Master TOC from the Project Toolbar and double-click the entry
the Printed Output tab to view the settings. This Chapter page is
Page". This is a 'page type' that allows you to change the look o
in a chapter. In this Sample Book project, all of the "First Pages
and footer but they are left empty so that there is nothing genera
output. This means if the chapter is not longer than one page, y
header or footer. Any Chapter pages following this page (in this
and CH1b) will automatically use the 'left' and 'right' page settin
in the 'Default' Page Layout file.

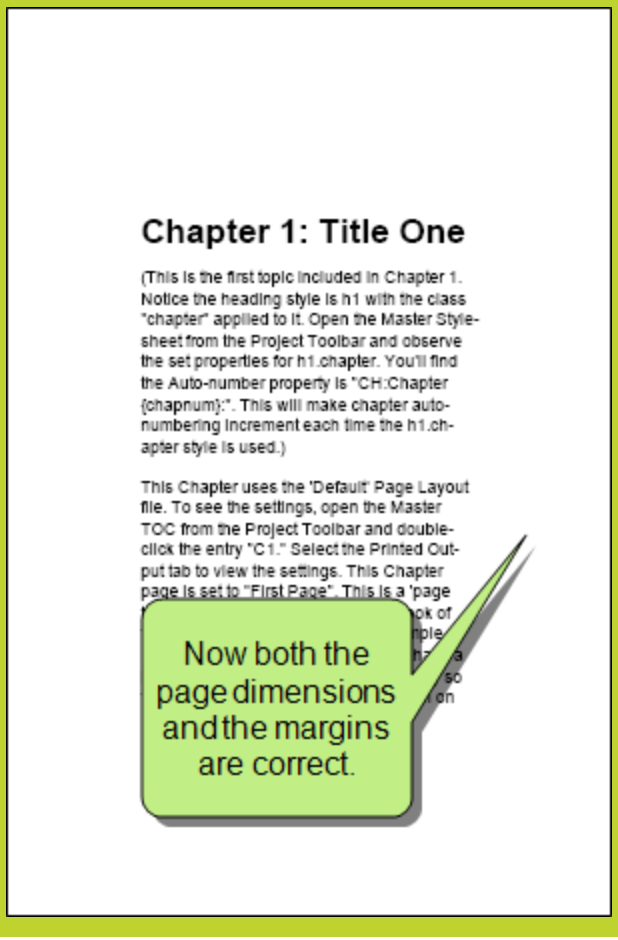
ated using a mini-TOC proxy. A mini-T
erate a portion of your table of content
put. You can insert a mini-TOC proxy in
ate a small TOC . The links in the mini-
d below the current topic in the main T

Of course, we can open the page layout and manually resize the body frame. But an easier solution is to simply set frame anchors.

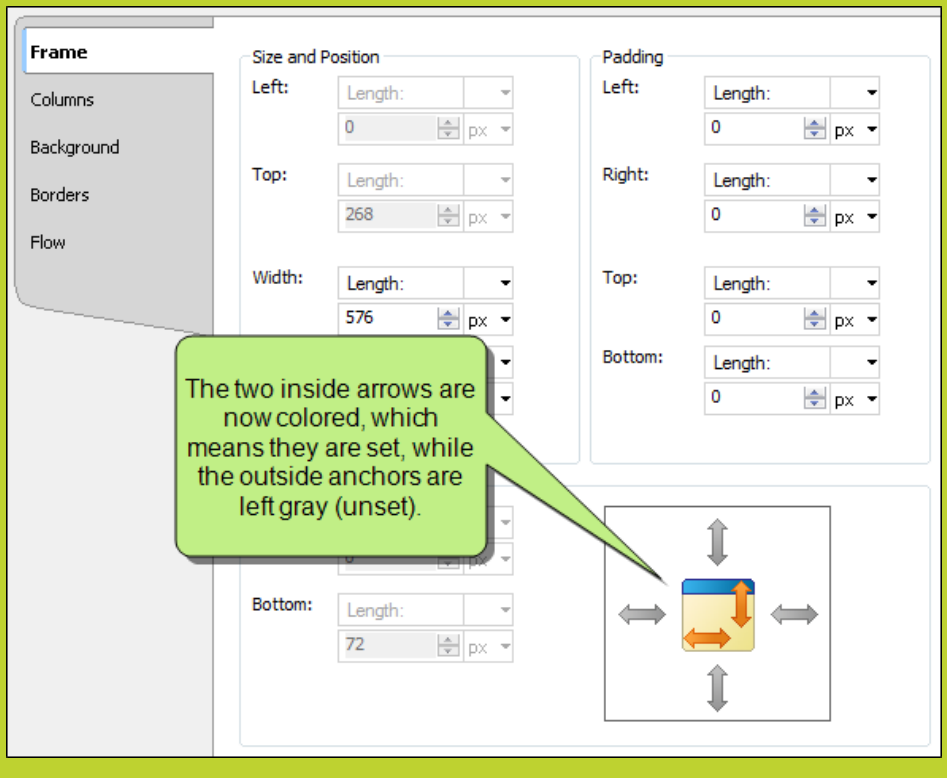
Therefore, you might decide to set your body frame anchors like this:



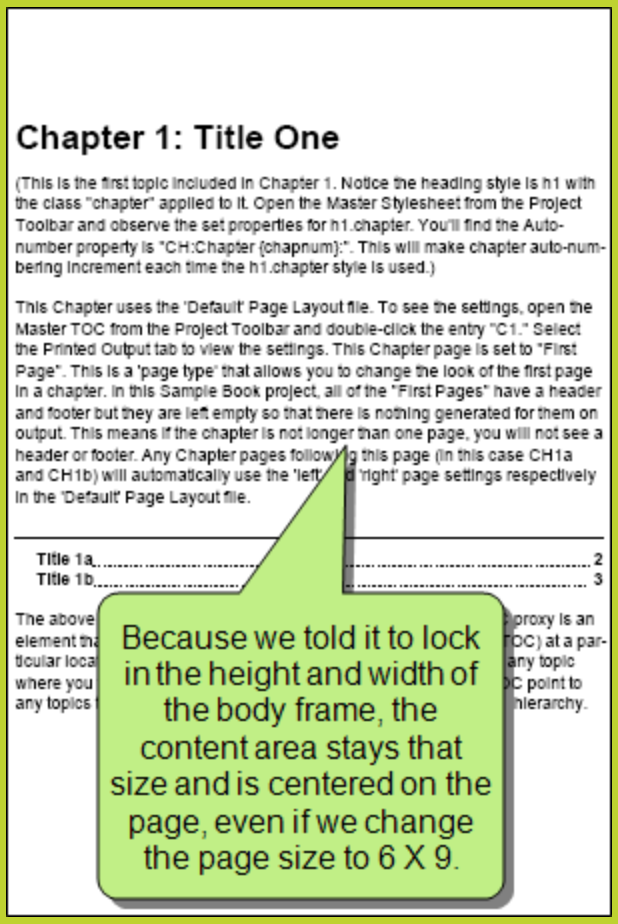
As a result, the output will look correct, whether the page dimensions are 8.5 X 11 or 6 X 9:



But now let's say that, instead of the outside anchors (which lock the distance from the edge of the body frame to the margins), you set the inside anchors (which center the body frame horizontally and vertically).



In that case, you would end up with this result in the output:



7. Click **OK**.
8. Click to save your work.

Setting Frame Breaks on Paragraphs and Headings

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

For PDF, XPS, and XHTML outputs, you can apply breaks to page layout frames, similar to the way you can apply page breaks to content such as headings or paragraphs.

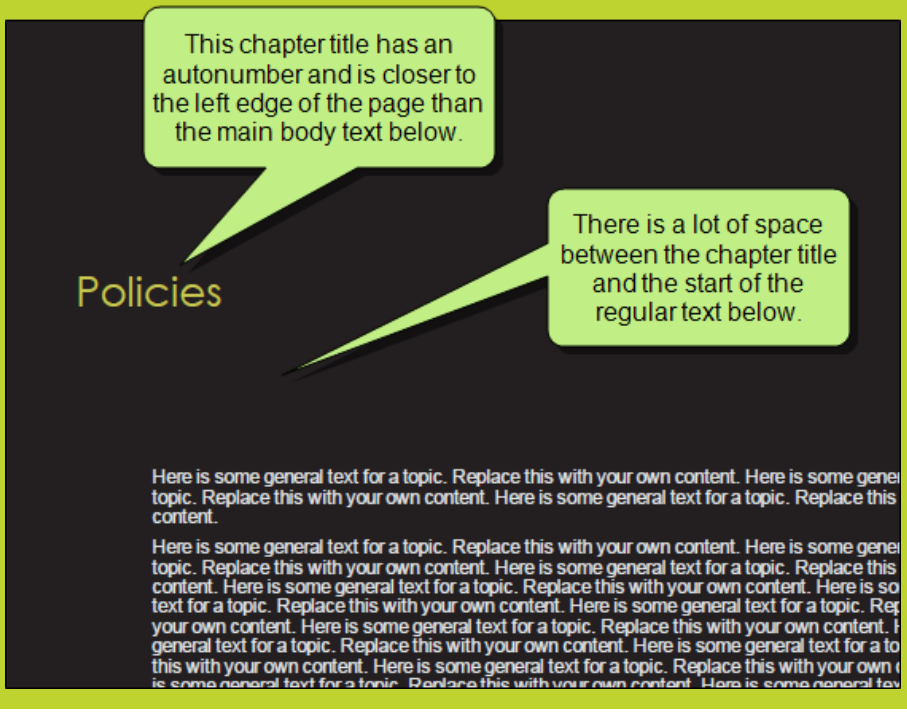
In a stylesheet, the following properties are used: frame-break-before, frame-break-after, frame-break-inside. These are not part of the W3C's CSS specification. Instead, they were created by MadCap Software specifically to support this functionality.

By applying these style properties, you can automatically move content to the next frame on the current page in a layout. If no more frames are available on the current page, a page break occurs instead.

This feature can be especially useful when you want to make sure that heading text is the only content in a particular body frame.

EXAMPLE

Let's say you want chapter titles to appear by themselves in PDF output. You want the chapter title to start farther to the left than the rest of the body content, and you want extra space between the title and body content, in case you have long chapter titles that wrap to two lines.



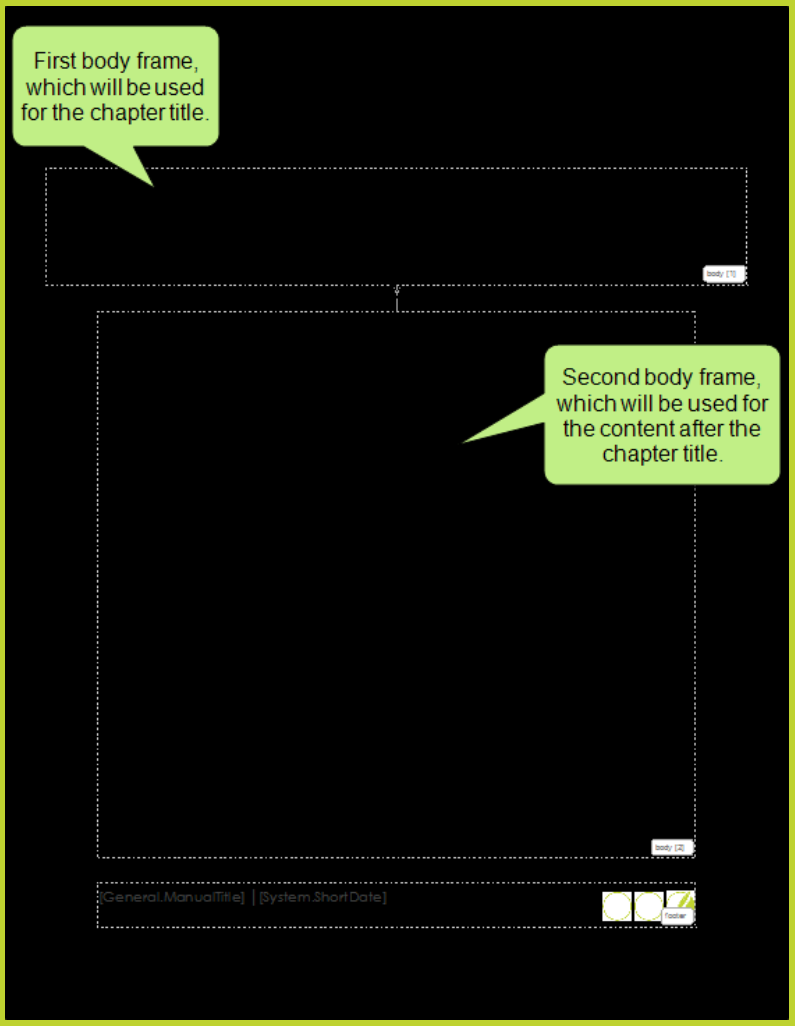
Here is a long chapter title that wraps to two lines.

Company History, Timeline of Very Important Milestones, and Mission Statement

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

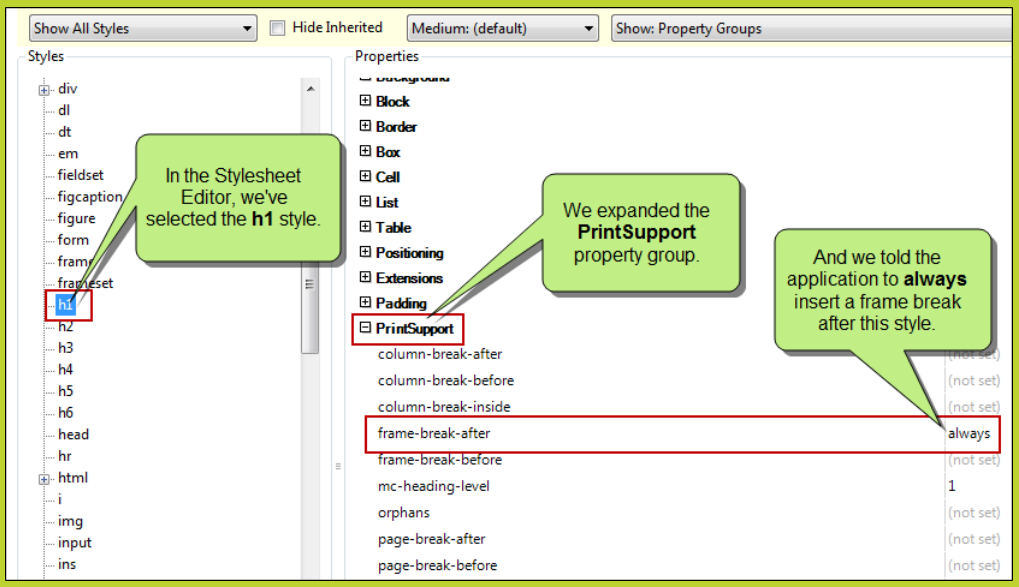
- Here is a cross-reference link: See "Introduction" on the next page.
- Here is a cross-reference link: See "Mission Statement" on page 7.
- Here is a cross-reference link: See "Company History" on page 8.
- Here is a cross-reference link: See "Organizational Chart" on page 9.

In your page layout, you can create one body frame that you want to be used to display the chapter title, and a second, much larger body frame to display the content following it.



This might work fine when you have long chapter titles that wrap to two lines, but if you have a short, one-line title, the body text from below will creep up and start below it in the first body frame, like this:

To solve the issue, you apply a frame break to the style used for your chapter titles (e.g., h1).



Therefore, even when a chapter title is short, Flare inserts a break after it. This creates the effect that you want, where only the chapter title appears in the top body frame, and everything else shows up in the second body frame.

This can be done through styles or by using local formatting. Using styles is usually recommended because the setting is automatically applied to any content using that style throughout the project, whereas local formatting affects only the particular content that you are working on.

HOW TO USE A STYLE TO SET A FRAME BREAK

1. Open the stylesheet that you want to modify.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.
3. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Paragraph Styles.
4. Select the appropriate style. In most cases, this will be a heading style (e.g., h1, h2, h3). But you can also place a frame break on other block-level styles, such as paragraphs.
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
6. In the **Properties** section, expand the **PrintSupport** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
7. Select the appropriate property and value for it.

   FRAME-BREAK-BEFORE

   Click to the right of this property to set a frame break before the element.

   - **always** A frame break will always occur before the element.
   - **auto** A frame break will neither be forced nor prevented before the element.
   - **avoid** A frame break will not occur before the element.
   - **inherit** The frame break setting of the parent tag is used.

   FRAME-BREAK-AFTER

   Click to the right of this property to set a frame break after the element.

   - **always** A frame break will always occur after the element.
   - **auto** A frame break will neither be forced nor prevented after the element.
   - **avoid** A frame break will not occur after the element.
   - **inherit** The frame break setting of the parent tag is used.

   FRAME-BREAK-INSIDE

   You can select one of the options for setting a frame break inside the "rendering box" of the element.

   - **automatic** A frame break will neither be forced nor prevented inside the rendering box of the element.
   - **avoid** A frame break will not occur inside the rendering box of the element.
   - **inherit** The frame break setting of the parent tag is used.

8. Click to save your work.

HOW TO USE LOCAL FORMATTING TO SET A FRAME BREAK

1. Open the content file (e.g., topic, snippet).
2. Click on the paragraph that you want to modify.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Home** ribbon. At the bottom of the **Paragraph** section click .

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.
   - **Menu** Select **Format>Paragraph**.
   - **Keyboard Shortcut** Press **CTRL+ALT+B**.
   - **Right-Click** Right-click on the paragraph and from the content menu choose **Paragraph**.

   The Paragraph Properties dialog opens.
4. Select the **Breaks** tab.
5. Use the **Frame Break** section to specify the settings.

   BEFORE

   You can select one of the options for setting a frame break before the element.
   - **Automatic** A frame break will neither be forced nor prevented before the element.
   - **Always** A frame break will always occur before the element.
   - **Avoid** A frame break will not occur before the element.

   AFTER

   You can select one of the options for setting a frame break after the element.
   - **Automatic** A frame break will neither be forced nor prevented after the element.
   - **Always** A frame break will always occur after the element.
   - **Avoid** A frame break will not occur after the element.

INSIDE

You can select one of the options for setting a frame break inside the "rendering box" of the element.

- **Automatic** A frame break will neither be forced nor prevented inside the rendering box of the element.
- **Avoid** A frame break will not occur inside the rendering box of the element.

6. In the Paragraph Properties dialog, click **OK**.
7. Click to save your work.

Note: You can also set frame breaks on tables. See "Setting Page, Column, and Frame Breaks on Tables" on the following page.

Setting Page, Column, and Frame Breaks on Tables

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

You can set page, column, and frame breaks on tables using a couple of different options. For additional information about frame breaks and why you might use them, see "Setting Frame Breaks on Paragraphs and Headings" on page 458.

In regular stylesheets, you can set breaks on the standard HTML table tags. The most common approach for page breaks is to set them on table rows through the <tr> style tag. Another option is that you can set breaks on rows (and on entire tables) through a table stylesheet. And because you can create patterns in table stylesheets, each pattern item might have different settings for breaks.

You might use standard HTML table tags in a regular stylesheet if you want all tables to follow the same behavior when it comes to breaks. On the other hand, you might use table style settings if you have complex tables and patterns requiring some table elements to break in a certain way and other elements to behave differently.

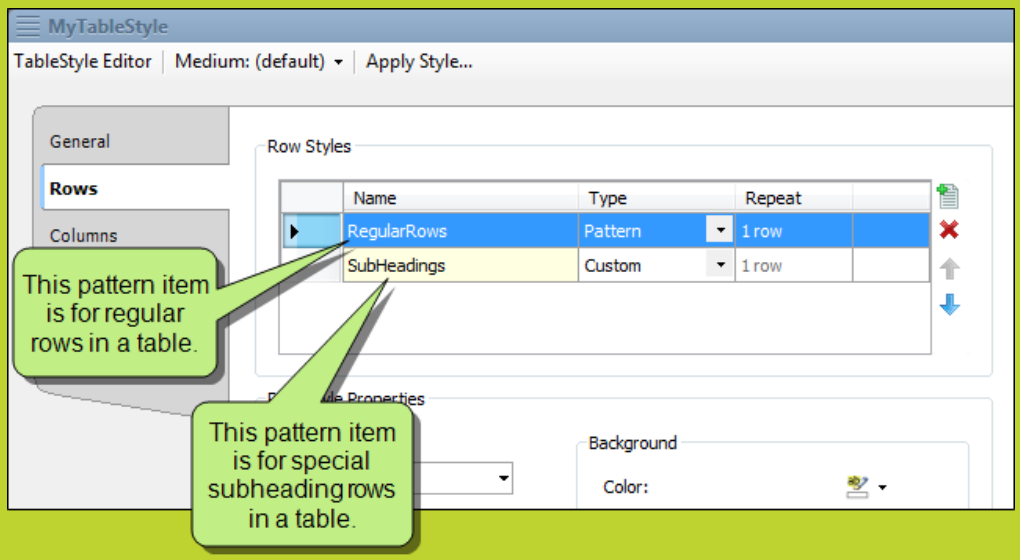
EXAMPLE—PAGE BREAK IN REGULAR STYLESHEET

Let's say you have a long table. In the output, the first part of the table might be shown on page 14, and the second part of it is shown on page 15. Suppose the final table row on page 14 has so much content that it wraps around to page 15, in essence splitting that row. If you would rather not split rows such as this, but rather keep them entirely on one page or another, you can set a page break on the <tr> style tag in a regular stylesheet. In this situation, you would set the "page-break-inside" property to "avoid." Therefore, all tables in your output would simply break automatically at the end of pages when necessary.

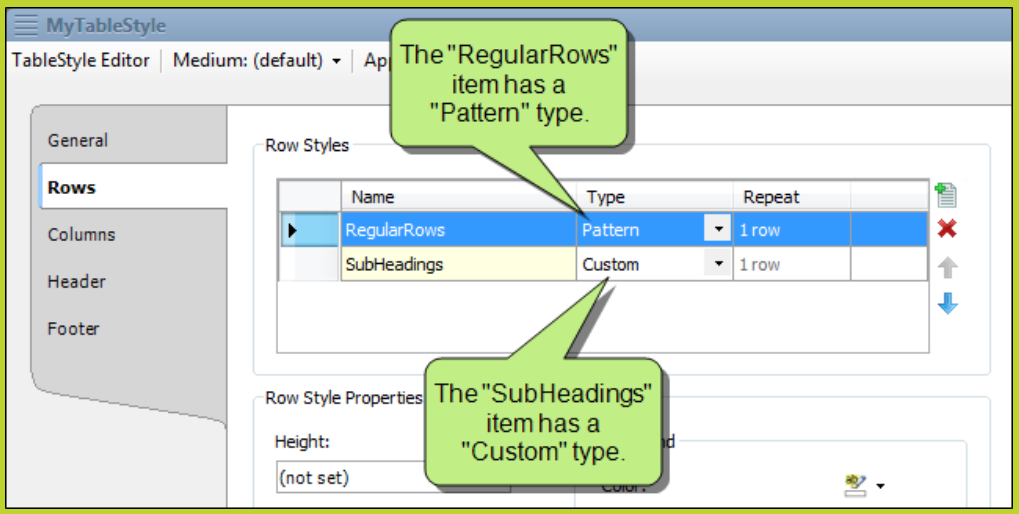
EXAMPLE—PAGE BREAK IN SPECIAL TABLE STYLESHEET

Let's say you have many tables where you have not only main headings with a gray background at the top of each table, but subheadings with a blue background every so many rows. And whenever a new subheading is needed, you want a page break to occur before it so that the subheading row begins a new page.

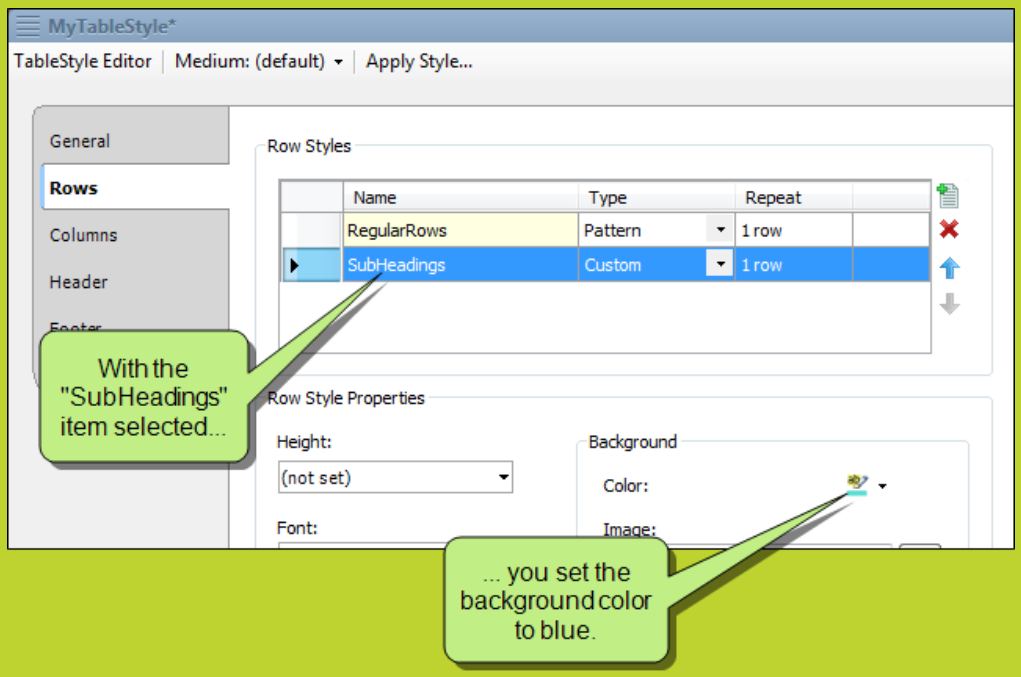
After designing your main header row in the Header tab of the Table Style Editor, you open the Rows tab. In the Rows tab you create two pattern items—one for the main table rows and another for rows used as subheadings.



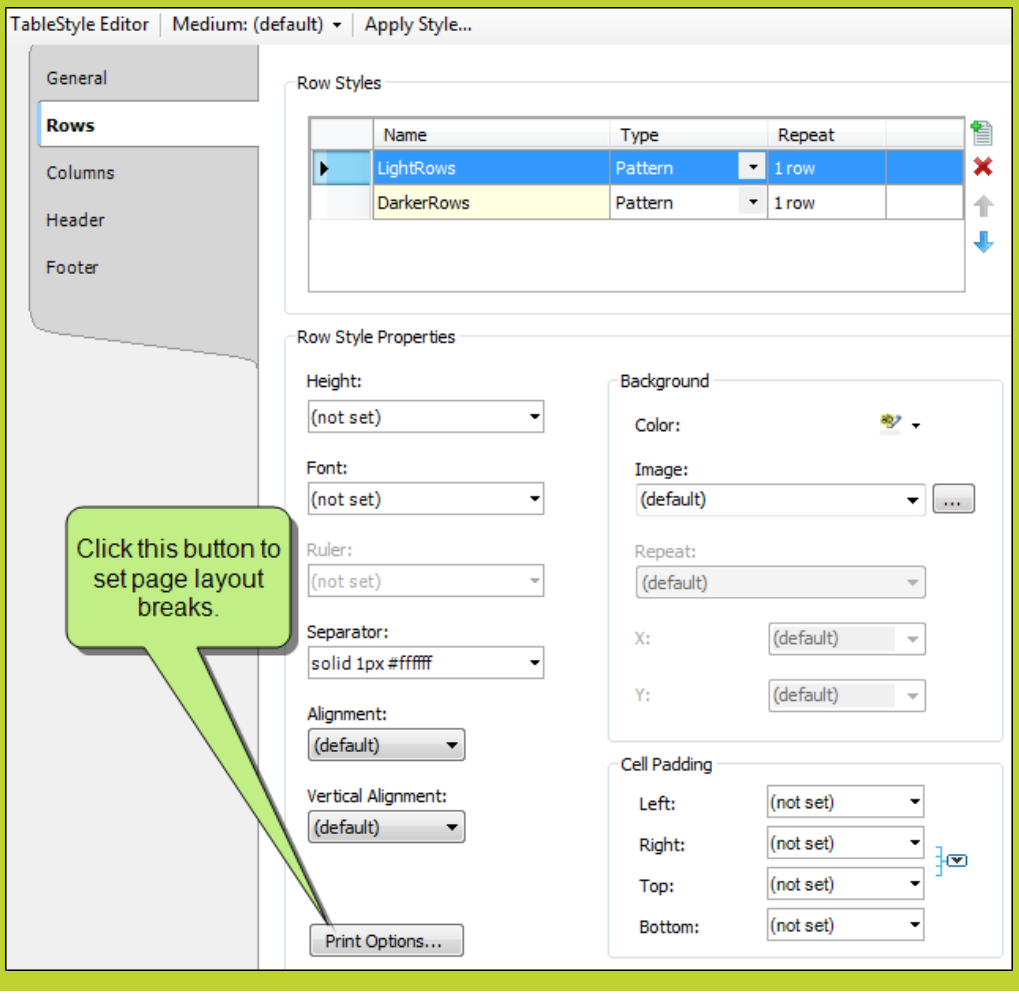
You leave the "RegularRows" item set as a "Pattern" type, which means that this style will be applied to rows in the table automatically. On the other hand, you change the type of the "SubHeadings" item to "Custom." This means that the style will not automatically be applied to rows to be used as subheadings; instead, you must apply the style to those rows manually. Why? Because you can't predict when you're going to need a subheading in a table. So you simply apply that look whenever it's needed.



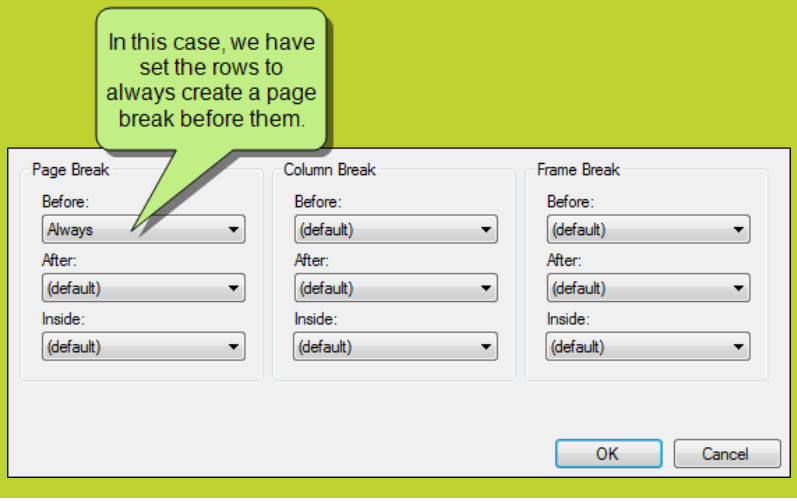
As mentioned, subheading rows should have a blue background, so that's what you set in the **Background** area.



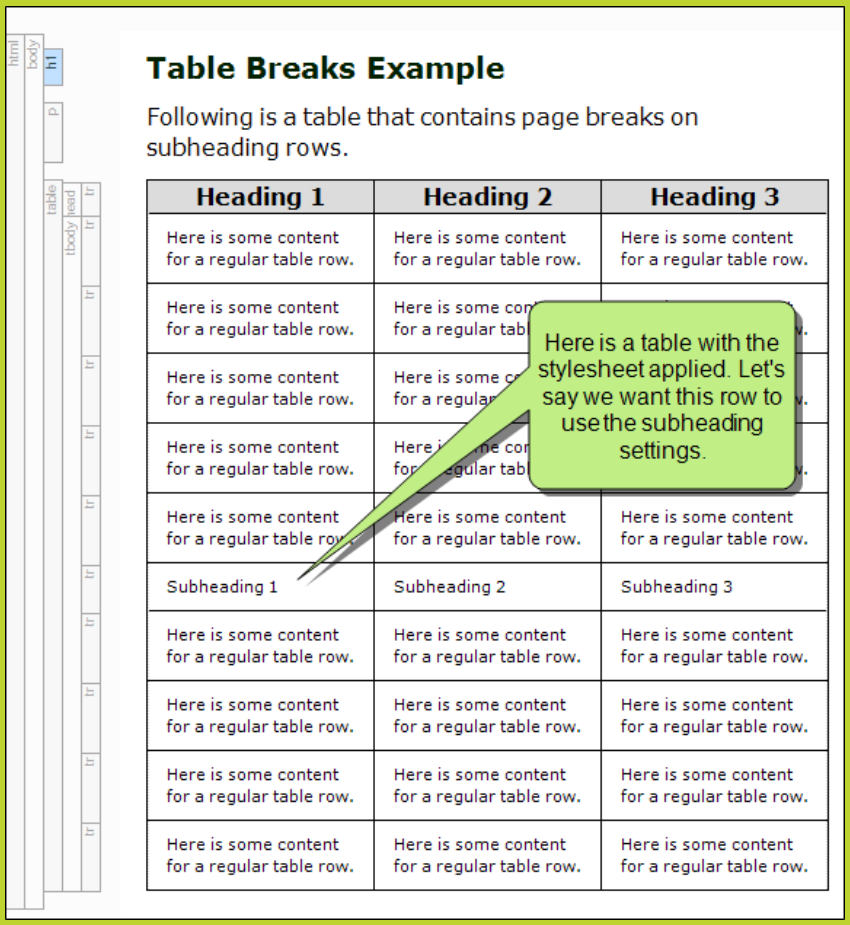
With the "SubHeadings" item still selected, you can click the **Print Options** button at the bottom of the tab.



In the Breaks dialog you select **Always** in the **Before** field in the **Page Break** section.



After you are finished designing your table stylesheet, you insert a table into a topic and apply the table stylesheet to it. But because the "SubHeading" pattern item was set to "Custom," none of the rows initially have the blue background or the page break setting.



In PDF output the table might look like this:

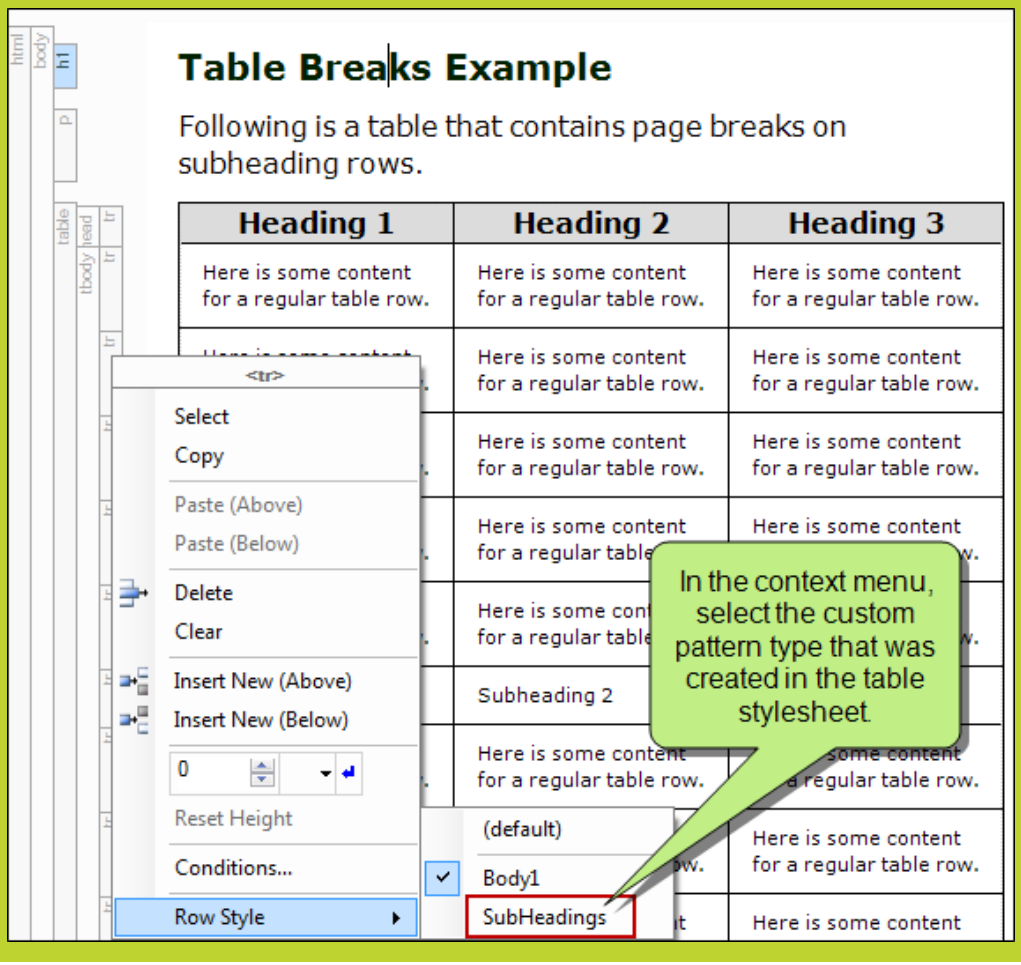
Table Breaks Example

Following is a table that contains page breaks on subheading rows.

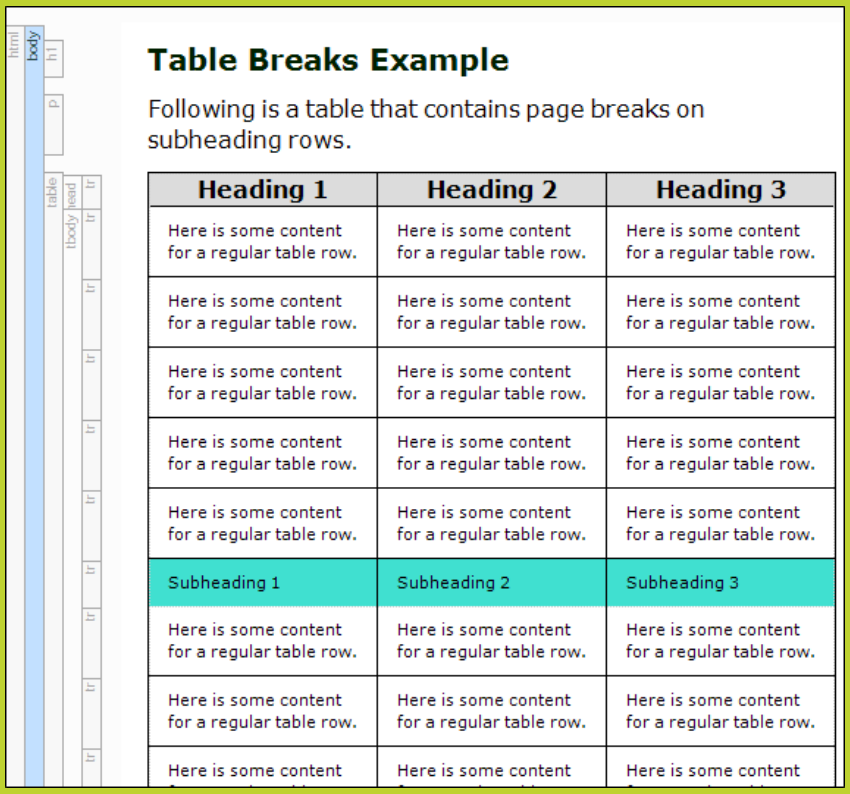
Heading 1	Heading 2	Heading 3
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Subheading 1	Subheading 2	Subheading 3
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.

- 1 -

In order for a row to be treated as a subheading row with a page break, you need to right-click on the **tr** tag bar and select the custom "SubHeadings" style.



In the XML Editor, the table might now look like this (in this example, the topic is being viewed with the Default medium, which is why we don't see the page break in action):



And in the PDF output, it would look like this:

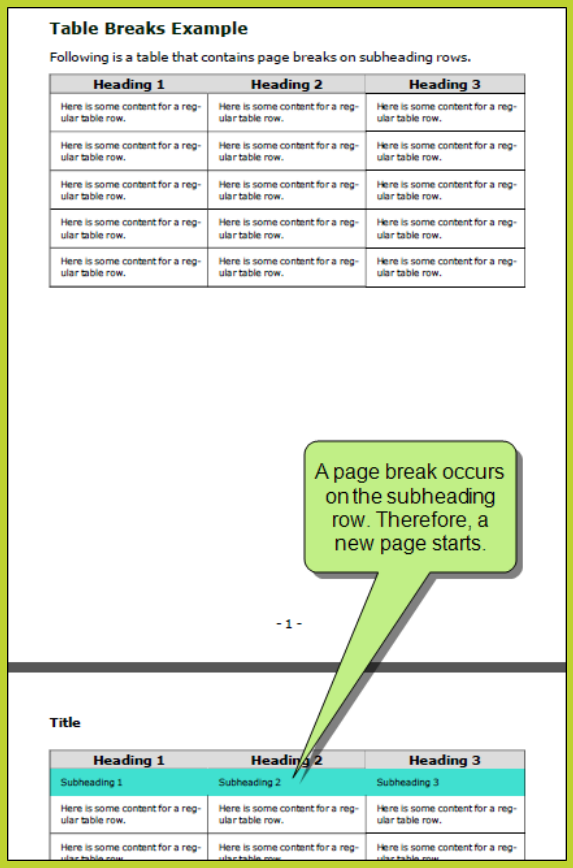


Table Breaks Example

Following is a table that contains page breaks on subheading rows.

Heading 1	Heading 2	Heading 3
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.

A page break occurs on the subheading row. Therefore, a new page starts.

- 1 -

Title

Heading 1	Heading 2	Heading 3
Subheading 1	Subheading 2	Subheading 3
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.
Here is some content for a regular table row.	Here is some content for a regular table row.	Here is some content for a regular table row.

HOW TO SET BREAKS FOR TABLES IN A REGULAR STYLESHEET

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. Make sure the appropriate medium is selected. If you are not using stylesheet mediums for your different outputs or if you want all mediums to have the same settings, just leave the medium set to "default" and continue.

   Mediums can be used if you want to use one group of settings for online output types (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and another group of settings for print-based output types (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). For example, you might use the "default" medium for your online outputs and you might use the "print" medium for your print outputs.
3. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.
4. In the upper-left corner of the editor, click in the **Show Styles** field and select Show Table Styles.
5. From the list below, select the appropriate style. Usually you want to put a break on <table> (which sets the break on the entire table) or <tr> (which sets the break on rows, allowing you to easily end a page with one row due to the amount of content, and begin the next page with the following row).
6. From the **Show** drop-down list on the upper-right side of the editor, select Show: Property Groups.
7. In the **Properties** section, expand the **PrintSupport** group.

   The property name is shown in the left column. The right column is used for selecting and entering values for the property.
8. Select the appropriate property and value for it. Perhaps the most common setting is to click to the right of **page-break-inside**, and select **avoid**. If you do this for the <tr> tag, Flare will automatically create a break between rows so that row content does not continue from one page to another.

   COLUMN-BREAK-BEFORE

   Click to the right of this property to set a column break before the element (if you are using a multi-column page layout).

   - **always** A column break will always occur before the element.
   - **auto** A column break will neither be forced nor prevented before the element.
   - **avoid** A column break will not occur before the element.
   - **inherit** The column break setting of the parent tag is used.

COLUMN-BREAK-AFTER

Click to the right of this property to set a column break after the element (if you are using a multi-column page layout).

- **always** A column break will always occur after the element.
- **auto** A column break will neither be forced nor prevented after the element.
- **avoid** A column break will not occur after the element.
- **inherit** The column break setting of the parent tag is used.

COLUMN-BREAK-INSIDE

Click to the right of this property to set a column break after the element (if you are using a multi-column page layout).

- **auto** A column break will neither be forced nor prevented inside the rendering box of the element.
- **avoid** A column break will not occur inside the rendering box of the element.
- **inherit** The column break setting of the parent tag is used.

FRAME-BREAK-BEFORE

Click to the right of this property to set a frame break before the element.

- **always** A frame break will always occur before the element.
- **auto** A frame break will neither be forced nor prevented before the element.
- **avoid** A frame break will not occur before the element.
- **inherit** The frame break setting of the parent tag is used.

FRAME-BREAK-AFTER

Click to the right of this property to set a frame break after the element.

- **always** A frame break will always occur after the element.
- **auto** A frame break will neither be forced nor prevented after the element.
- **avoid** A frame break will not occur after the element.
- **inherit** The frame break setting of the parent tag is used.

FRAME-BREAK-INSIDE

You can select one of the options for setting a frame break inside the "rendering box" of the element.

- **automatic** A frame break will neither be forced nor prevented inside the rendering box of the element.
- **avoid** A frame break will not occur inside the rendering box of the element.

- **inherit** The frame break setting of the parent tag is used.

PAGE-BREAK-BEFORE

Click to the right of this property to set a page break before the element.

- **always** A page break will always occur before the element.
- **auto** A page break will neither be forced nor prevented before the element.
- **avoid** A page break will not occur before the element.
- **inherit** The page break setting of the parent tag is used.
- **left** One or two page breaks will occur before the element so that the next page is formatted as a left page.
- **right** One or two page breaks will occur before the element so that the next page is formatted as a right page.

PAGE-BREAK-AFTER

Click to the right of this property to set a page break after the element.

- **always** A page break will always occur after the element.
- **auto** A page break will neither be forced nor prevented after the element.
- **avoid** A page break will not occur after the element.
- **inherit** The page break setting of the parent tag is used.
- **left** One or two page breaks will occur after the element so that the next page is formatted as a left page.
- **right** One or two page breaks will occur after the element so that the next page is formatted as a right page.

PAGE-BREAK-INSIDE

Click to the right of this property to set a page break inside the "rendering box" of the element.

- **auto** A page break will neither be forced nor prevented inside the rendering box of the element.
- **avoid** A page break will not occur inside the rendering box of the element.
- **inherit** The page break setting of the parent tag is used.

9. Click to save your work.

HOW TO SET BREAKS IN A TABLE STYLESHEET

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the Table Style Editor, select the appropriate tab, depending on the table element that you want to create the break for.
   - **General tab** This tab lets you set breaks for the entire table.
   - **Rows tab** This tab lets you set breaks for regular rows in the table.
3. If the tab has multiple pattern items, select the one that you want to set the break for (e.g., in the Row Styles section).
4. Toward the bottom of the tab click the **Print Options** button. (You may need to use the scroll bar to view this button.) The Breaks dialog opens.
5. Use the **Page Break**, **Column Break**, and **Frame Break** sections in the dialog to specify the settings for a page, column, or frame break, respectively.

   BEFORE

   You can select one of the options for setting a page or column break before the element.

   - **Automatic** A break will neither be forced nor prevented before the element.
   - **Always** A break will always occur before the element.
   - **Avoid** A break will not occur before the element.
   - **Force to 'left page'** One or two page breaks will occur before the element so that the next page is formatted as a left page. This option is available only for page breaks, not for column or frame breaks.
   - **Force to 'right page'** One or two page breaks will occur before the element so that the next page is formatted as a right page. This option is available only for page breaks, not for column or frame breaks.

   AFTER

   You can select one of the options for setting a break after the element.

   - **Automatic** A break will neither be forced nor prevented after the element.
   - **Always** A break will always occur after the element.
   - **Avoid** A break will not occur after the element.
   - **Force to 'left page'** One or two page breaks will occur after the element so that the next page is formatted as a left page. This option is available only for page breaks, not for column or frame breaks.
   - **Force to 'right page'** One or two page breaks will occur after the element so that the next page is formatted as a right page. This option is available only for page breaks, not for column or frame breaks.

INSIDE

You can select one of the options for setting a break inside the "rendering box" of the element.

- **Automatic** A break will neither be forced nor prevented inside the rendering box of the element.
- **Avoid** A break will not occur inside the rendering box of the element.

6. (Optional) If you have selected the General tab, you can also set widow and orphan properties for the table. By default, table widows and orphans are set at 1, which means that it is possible for there to be a single row from a table left at the top or bottom of a page or column (if you use multi-column page layouts). But you can change the setting in order to ensure that multiple rows are always shown at the top or bottom of a page or column.
   a. In the **Widows** section, click the down arrow in the upper-right corner and select **Number**. Then enter a number in the field. This determines the number of leftover rows allowed at the top of a page or column.
   b. In the **Orphans** section, click the down arrow in the upper-right corner and select **Number**. Then enter a number in the field. This determines the number of leftover rows allowed at the bottom of a page or column.
7. Click **OK**.
8. Click to save your work.

Note: Because you can often control the look of a table in multiple ways—(1) using local table properties, (2) using other local formatting tools, (3) a table stylesheet, or (4) a regular stylesheet—it's possible that you might encounter conflicting settings from time to time. When it comes to situations like this, the settings closest to the content typically has precedence. So any explicit setting in the Table Properties dialog (or other local formatting) has precedence over both stylesheet options, and the table stylesheet setting has precedence over the regular stylesheet setting. For example, let's say you open a regular stylesheet and specify that the outer borders of the table should be green. Then you open the table stylesheet and specify that the outer borders should be red. And then you open the Table Properties dialog and specify that the outer borders should be blue. You've told Flare to do three different things to the same table. So in this case, the table would display blue borders, because the local properties rule over the other settings. But if you remove that setting from the Table Properties dialog and use the default setting, the table would then display red borders, because the table stylesheet has precedence over the regular stylesheet. And finally, if you remove the settings from both the Table Properties dialog and table stylesheet, using the default setting in both, the table would take its command from the regular stylesheet and display green borders.

Note: If you are using a multi-column page layout and set an "Inside" break to "Avoid," you must specify this in both the "Page Break" and "Column Break" fields.

Note: Frame breaks are supported only in PDF, XPS, and XHTML outputs.

Specifying a Frame Background

You can add a color and/or image to the background of a frame.

HOW TO ADD A BACKGROUND TO A FRAME

1. Open the page containing the frame.
2. Double-click the frame. The Frame Properties dialog opens.
3. Select the **Background** tab.
4. Use the tab to specify the settings that you want for the background.

   SET A COLOR FOR THE BACKGROUND

   a. In the **Color** section, select a color direction for the frame background.
   b. In the **Fill Start** field, click the down arrow and select a color to use at the beginning of the background color gradient.
   c. In the **Fill End** field, click the down arrow and select a color to use at the end of the background color gradient.

   ADD AN IMAGE TO THE BACKGROUND

   a. In the **Image** section, click the **Browse** button. The Insert Image dialog opens.
   b. Select an image file to insert. You can do this in one of the following ways.
      - Select an image already in the project by finding and selecting it in the built-in tree.

        OR

      - Click ... to find and select an image file outside of the project.

      Note: If you want to select an image file that you recently inserted somewhere in your project, click the down arrow in the field next to the Browse button and select the file from the list.

   c. Click **OK**.
   d. (Optional) In the **Repeat** field, select whether you want the image to repeat in the background.
   e. (Optional) In the **X** field, select or enter the horizontal position of the background image in the frame.
   f. (Optional) In the **Y** field, select or enter the vertical position of the background image in the frame.
   g. Click **OK**.
5. In the Frame Properties dialog, click **OK**.
6. Click to save your work.

Specifying Frame Borders

You can add borders around a frame. This might be useful, for example, if you want a line to run across the bottom of the header on a page. For PDF, XPS, and XHTML outputs, you can also make the borders rounded by using border radius properties.

HOW TO ADD BORDERS TO A FRAME

1. Open the page containing the frame.
2. Double-click the frame. The Frame Properties dialog opens.
3. Select the **Borders** tab.
4. Set the options in the **Borders** section.
   a. Click in any of the individual fields (**Left**, **Right**, **Top**, **Bottom**) to specify the settings for the border. If you click the down arrow to the right of all the fields, the settings will be applied to all of the border fields.

      When you click that down arrow or in one of the individual fields, a small popup displays.

   b. Use the lower-left area of the popup to enter a number for the border thickness.
   c. Use the lower-middle area to select a unit of measurement (e.g., point, pixel, centimeter) for the number you entered.
   d. Use the upper-right area to select a color for the border.
   e. Use the lower-right area to select a line type (e.g., solid, double, dashed) for the border.
   f. Click **OK**.
5. If you want the frame to have rounded corners, set the options in the **Border Radius** section. This is supported only in PDF, XPS, and XHTML outputs.
   a. Click in any of the individual fields (**Top-Left**, **Top-Right**, **Bottom-Right**, **Bottom-Left**) to specify the settings for a particular corner of the frame. If you click the down arrow to the right of all the fields, the settings will be applied to all of the fields.

      When you click that down arrow or in one of the individual fields, a small popup displays.

      This popup has two halves. you can complete only the left side of the popup if you like. This will create a curve that is equal horizontally and vertically. If you want a border to have more of a curve either horizontally or vertically, you can complete the fields in the right half of the popup as well, so that you have two values (e.g., 10px 15px) instead of one. For more information on using two sets of border-radius properties, see **http://www.css3.info/preview/rounded-border/**.

   b. Use the lower-left area of the popup to enter a number for the amount of curve. The greater the number, the more curve that is applied.
   c. Use the area to the right of the number field to select a unit of measurement (e.g., point, pixel, centimeter).

d. If you want to provide a second value for the rounded border, complete the same fields on the right half of the popup.

e. Click **OK**.

6. In the Frame Properties dialog, click **OK**.

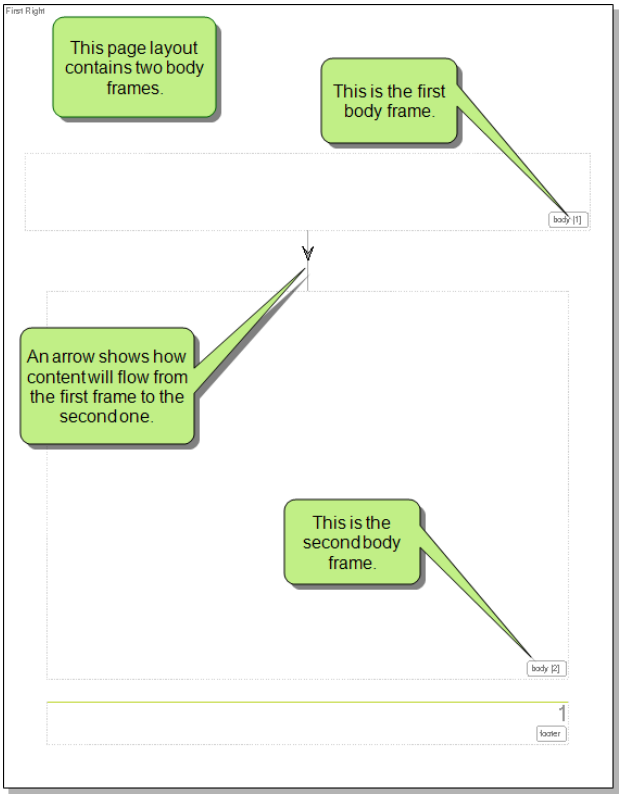
7. Click to save your work.

Note: Microsoft Word output does not support frame borders.

Specifying Frame Flow

Each frame that you add to a page has a specific type (Body, Header, Footer, Decoration, Image). The type determines how the frame behaves in the output and the flow of its content. For example, a Body frame will automatically display the content from your topics, whereas a Footer frame only displays the content that you add to it.

If you add more than one frame of the same type to a page, they are numbered in the order you add them (1, 2, 3, and so on), and arrows connect them to indicate the flow, starting at the first frame. When you generate output, if the first frame becomes completely filled with content, the content then continues in the second frame, then the third, etc. If you remove one of the frames, the remaining ones are renumbered (e.g., if you have four body frames and remove the second one, third frame is renumbered 2 and the fourth one is renumbered 3).



HOW TO SPECIFY THE FLOW FOR A FRAME

1. Open the page containing the frame.
2. Double-click the frame. The Frame Properties dialog opens.
3. Select the **Flow** tab.
4. Select one of the options to determine the flow of the frame.
   - **Body** This frame, usually the largest on the page, is basically a placeholder for the content that you add to topics. You cannot add content directly to a body frame. If necessary, you can have multiple body frames on a page. This lets you customize the flow of text from one frame to another on a page.
   - **Header** This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the top of a page, above the body text.
   - **Footer** This frame is designed to hold content from the topic (e.g., chapter title, page number) or text that you add. The frame is usually positioned at the bottom of a page, below the body text.
   - **Decoration** This frame can be used to display content for aesthetic purposes on a page. You can add color, a border, text, and images to a decoration frame.

     Note: Decoration frames are not supported in Microsoft Word or Adobe FrameMaker output.
5. In the Frame Properties dialog, click **OK**.
6. Click to save your work.

Specifying Frame Padding

If you want there to be a certain amount of space between the edge of a frame and the content within it, you can set the padding.

HOW TO SPECIFY THE PADDING FOR A FRAME

1. Open the page containing the frame.
2. Double-click the frame. The Frame Properties dialog opens.
3. Select the **Frame** tab.
4. Use the **Padding** section to enter settings.
   - **Left** Enter the amount of space that you want to be added between the left edge of the frame and any text or content within it. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Right** Enter the amount of space that you want to be added between the right edge of the frame and any text or content within it. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Top** Enter the amount of space that you want to be added between the top edge of the frame and any text or content within it. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Bottom** Enter the amount of space that you want to be added between the bottom edge of the frame and any text or content within it. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
5. Click **OK**.
6. Click to save your work.

Specifying Frame Size

You can easily set the size and position for a frame on a page, either by entering specific values in the Frame Properties dialog or by dragging the frame as needed.

HOW TO RESIZE A FRAME BY DRAGGING

1. Open the page containing the frame.
2. Click on the frame.
3. (Optional) If you want to maintain the aspect ratio (i.e., keep the width and height in proportion to one another), hold down your SHIFT key.
4. Hover over any of the handles around the edge of the frame until the cursor looks like this: .
5. Click and drag until you get the size you want.

HOW TO SPECIFY THE SIZE FOR A FRAME USING THE PROPERTIES DIALOG

1. Open the page containing the frame.
2. Double-click the frame. The Frame Properties dialog opens.
3. Select the **Frame** tab.
4. Use the **Size and Position** section to enter settings for the distance of the frame from the left and top edges of the page, as well as the width and height of the frame.
   - **Left** Enter the position of the frame horizontally (i.e., on the X axis) from the left margin on the page. For example, if the left margin is set at 1 inch and you enter a value of .5 inch in this field, the frame will be positioned .5 inch from the left margin (i.e., 1.5 inches from the left edge of the page). You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Top** Enter the position of the frame vertically (i.e., on the Y axis) from the top margin on the page. For example, if the top margin is set at 1 inch and you enter a value of .5 inch in this field, the frame will be positioned .5 inch from the top margin (i.e., 1.5 inches from the top edge of the page). You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Width** Enter the width of the frame. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
   - **Height** Enter the height of the frame. You can also use the up and down arrows. To select a unit of measurement, click the down arrow in the units of measurement field and select one of the options.
5. Click **OK**.
6. Click to save your work.

Copying Pages in Page Layouts

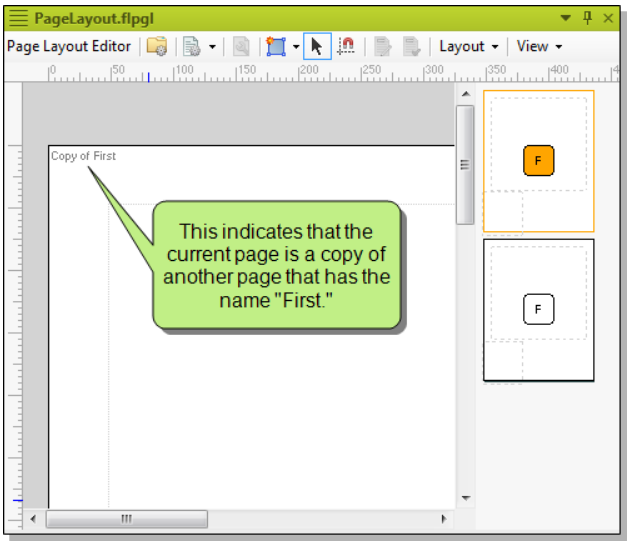
If you have already created and configured a page in a page layout and want to create a new page that shares some of the same settings, you can make a copy of it. After the new page is created (which is exactly like the original page, except for the page name), you can change any of the frame content or other settings as needed.

HOW TO COPY A PAGE IN A PAGE LAYOUT

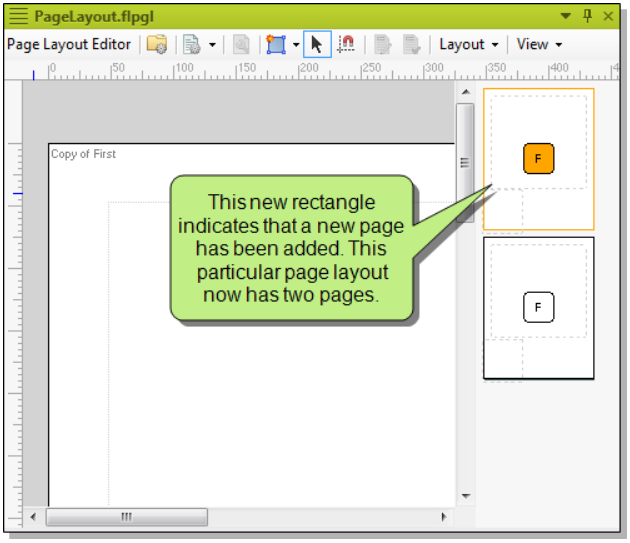
1. Open the page in the page layout that you want to copy.
2. In the local toolbar, click the down arrow next to the **Page Properties** button .
3. In the drop-down, select **Copy Page**.
4. In the local toolbar, click the down arrow next to the **Page Properties** button .
5. In the drop-down, select **Paste Page**.

   A copy of the page is added to the layout. This is indicated in a couple of ways.

   First, the new page displays the same page name as the source page (in the upper-left corner), with the words "Copy of" before it.



Second, a new small rectangle is added to the right of the Page Layout Editor, representing the new page.



6. Click to save your work.

Associating Master Page Layouts with Projects

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time.

The following steps show how to associate a "master" page layout at the project level.

HOW TO ASSOCIATE A MASTER PAGE LAYOUT WITH A PROJECT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Properties** section select **Project Properties**.
   - **Menu** Select **Project>Project Properties**.
   - **Project toolbar** Click Project Properties...

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
2. Select the **Defaults** tab.
3. Click in the **Master Page Layout** field, and from the drop-down, select the page layout that you want to use for all topics in the project.
4. Click **OK**.
5. Click to save your work.

Note: There is an order of precedence with the three levels where you can specify a page layout. Specific entries in an outline TOC have the highest precedence, followed by page layouts at the target level, followed by page layouts at the project level. So if you've got a page layout set at the project or target level and it doesn't seem to be working the way you think it should, you might check to see if you have any page layouts set on specific TOC entries that are overriding the target- or project-level setting.

Associating Master Page Layouts with Targets

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time.

The following steps show how to associate a "master" page layout at the target level.

HOW TO ASSOCIATE A MASTER PAGE LAYOUT WITH A TARGET

1. Open the target. The Target Editor opens.
2. Select the **General** tab.
3. Click in the **Master Page Layout** field, and from the drop-down select the page layout that you want to use for all topics in the target.
4. Click to save your work.

Note: There is an order of precedence with the three levels where you can specify a page layout. Specific entries in an outline TOC have the highest precedence, followed by page layouts at the target level, followed by page layouts at the project level. So if you've got a page layout set at the project or target level and it doesn't seem to be working the way you think it should, you might check to see if you have any page layouts set on specific TOC entries that are overriding the target- or project-level setting.

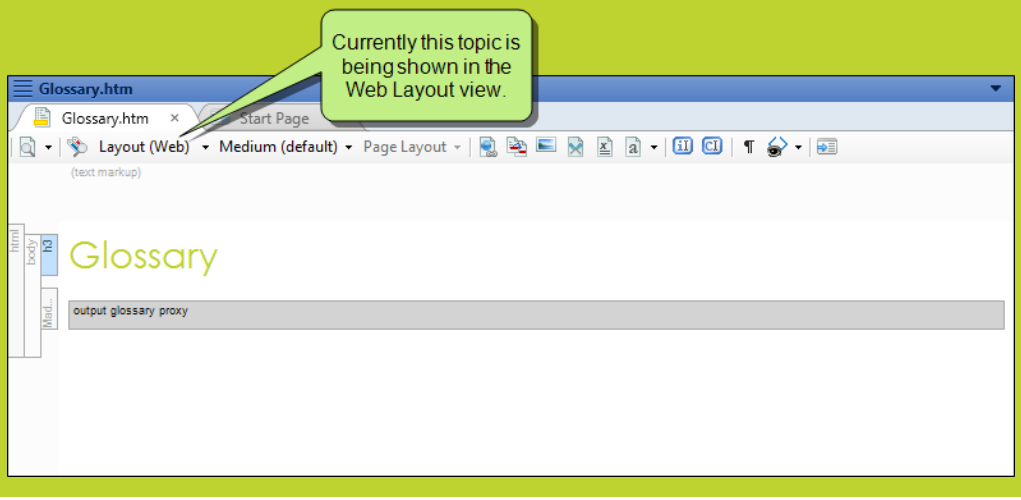
Selecting a Page Layout to View Content in the XML Editor

There are two views to choose from in the XML Editor when you edit topics—Web Layout mode and Print Layout mode. The Print Layout mode lets you see how the pages will look with a page layout applied to it. In other words, it lets you see how the page will look when you generate print-based output. This means that you will be able to view the actual page size and orientation, as well as the margins and any header or footer content. You can toggle between the two views in the XML Editor by clicking the **Layout** button: Layout (Web) or Layout (Print). See "About Layout Modes" on page 22.

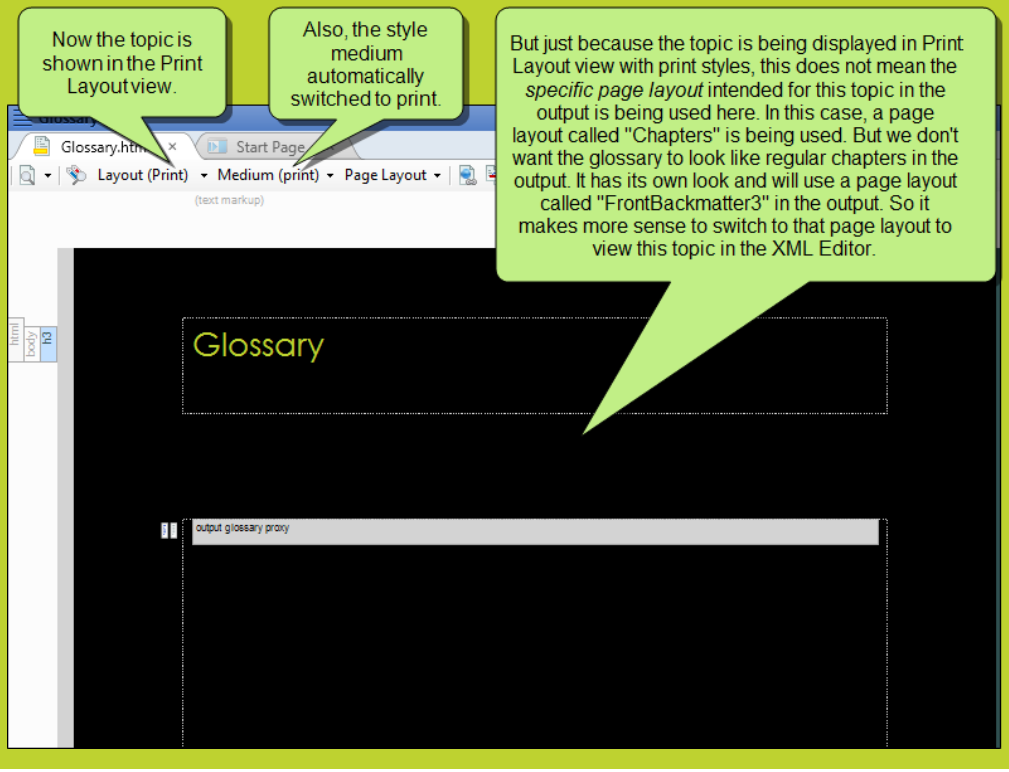
If you are viewing content using the Print Layout in the XML Editor, you can use another drop-down in the local toolbar to choose a specific page layout.

E X A M P L E

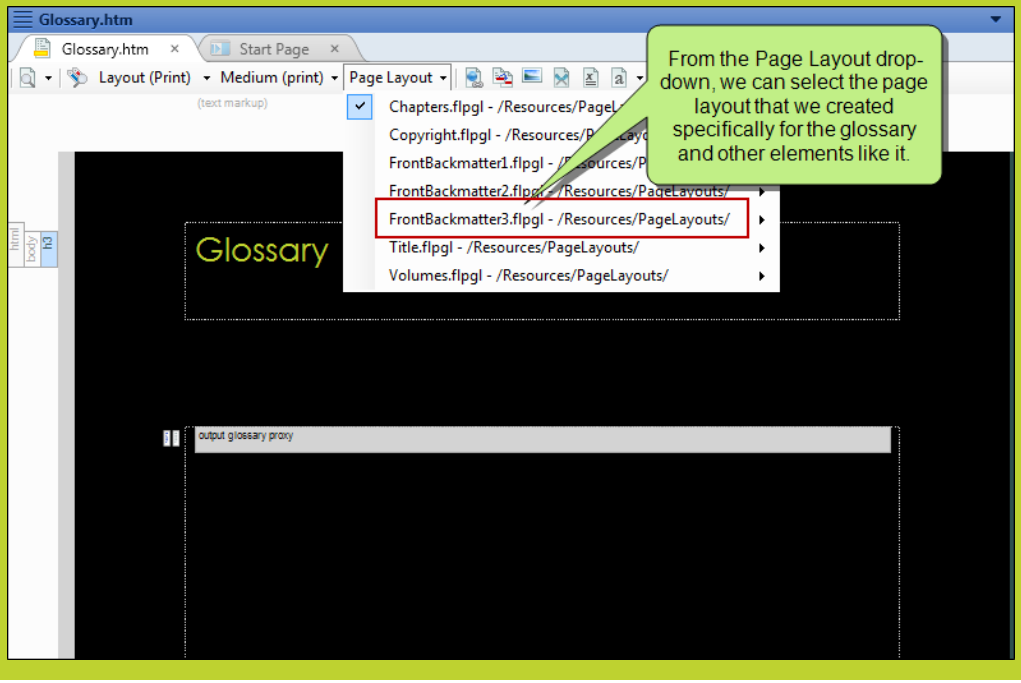
Let's say you've created a topic designed to display your generated glossary in print-based outputs. If you open the topic in Web Layout view in the XML Editor, it might look something like this.

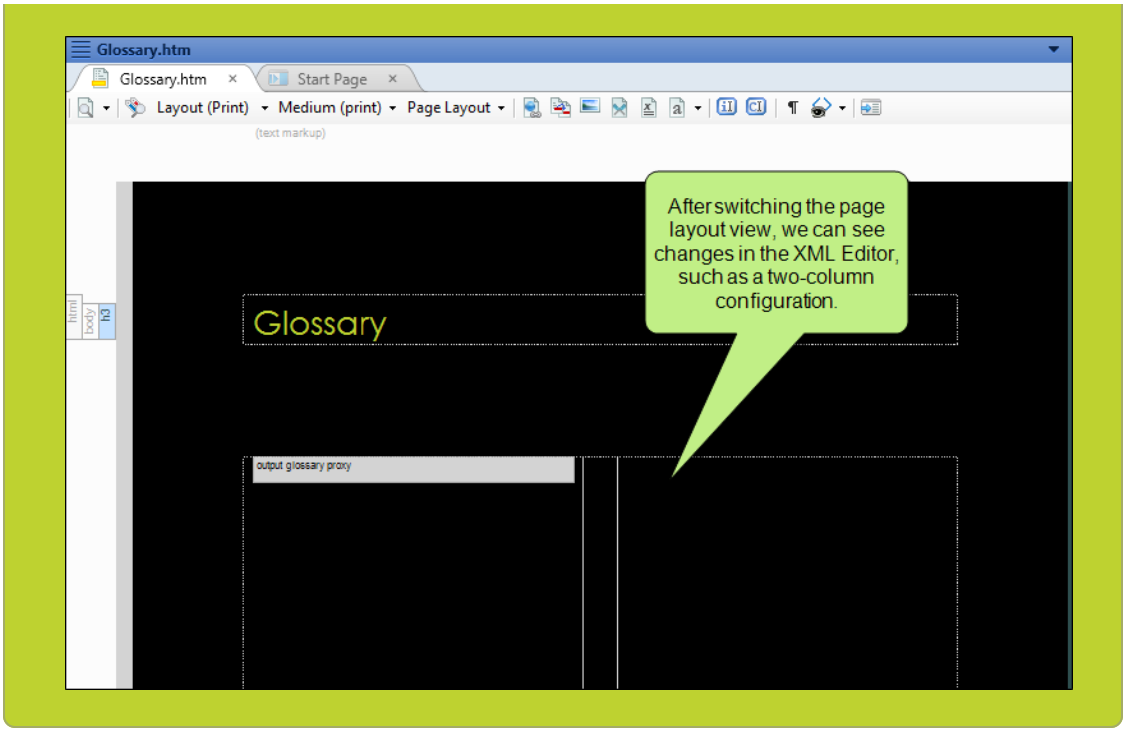


Because this topic is to be used in print-based outputs only, you switch to the Page Layout view.



To get a more accurate preview of how the topic will look in the output, we switch to the page layout that will be used for the glossary.

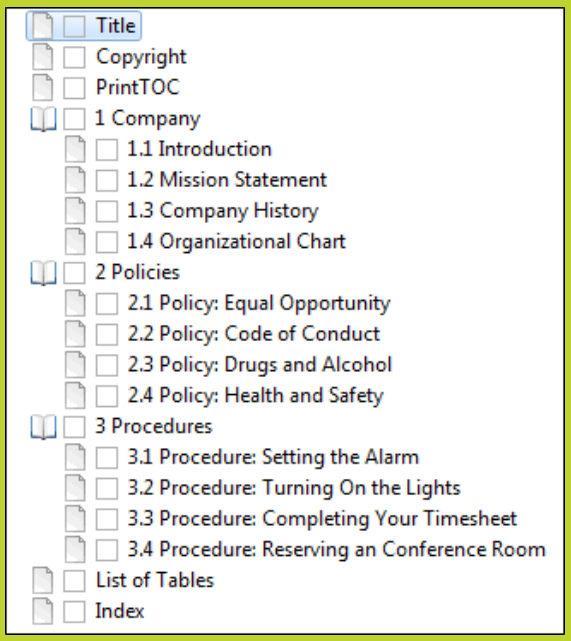



Glossary.htm
Glossary.htm
Start Page
Layout (Print)
Medium (print)
Page Layout
(text markup)
html
body
h3
Glossary
output glossary proxy
After switching the page layout view, we can see changes in the XML Editor, such as a two-column configuration.

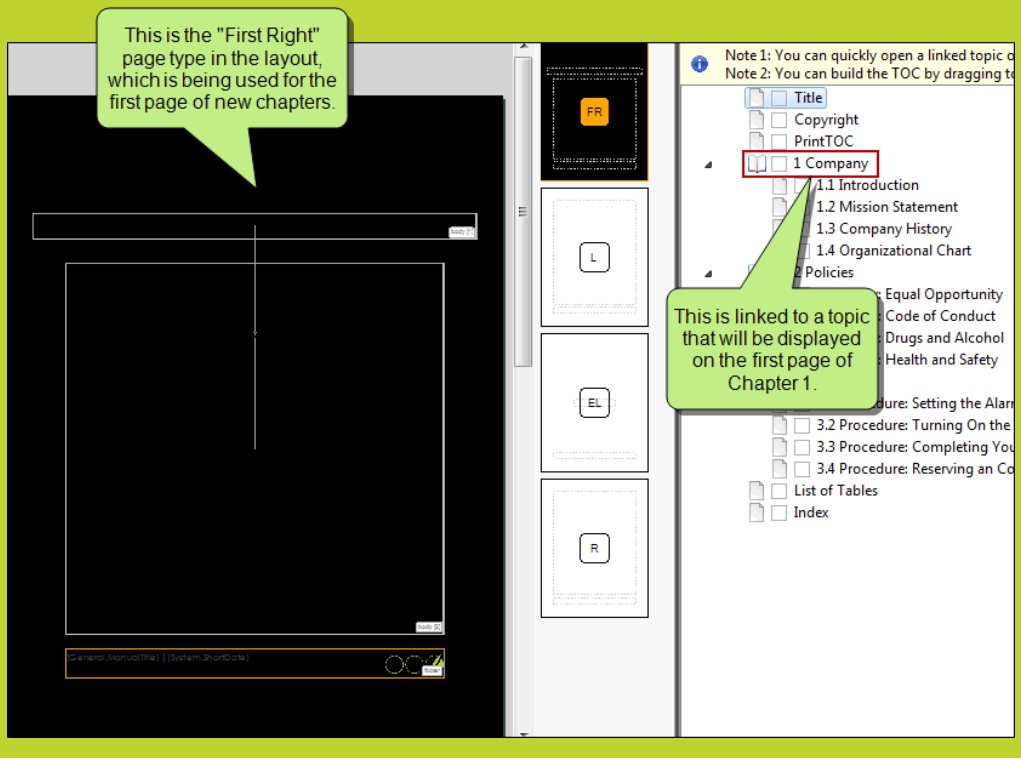
Not only can you select a certain page layout to display a topic in the XML Editor, but you can also choose a specific page type within that layout. This can be especially useful when you know for certain that a particular topic will display on the first page of a chapter, a left page, a right page, etc. The reason Flare does not automatically show a topic in the appropriate page type is because it won't assign page types to content until you generate the output. However, sometimes you may know in advance which page type will be used because of its placement in the outline TOC, so you can choose any page type contained in the layout to display the topic in the XML Editor.

E X A M P L E

Let's say you have are planning on generating a PDF with the following structure:

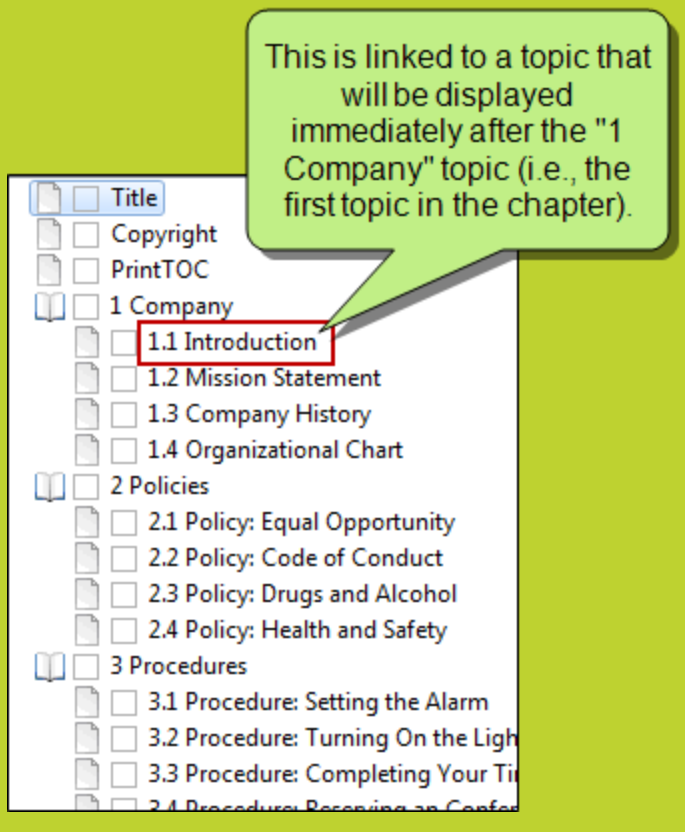


The topic linked to "1 Company" is set to be the first page of a new chapter. You've configured your page layout to use the "First Right" page type for the first page of a chapter. Here is how that page looks in your layout:

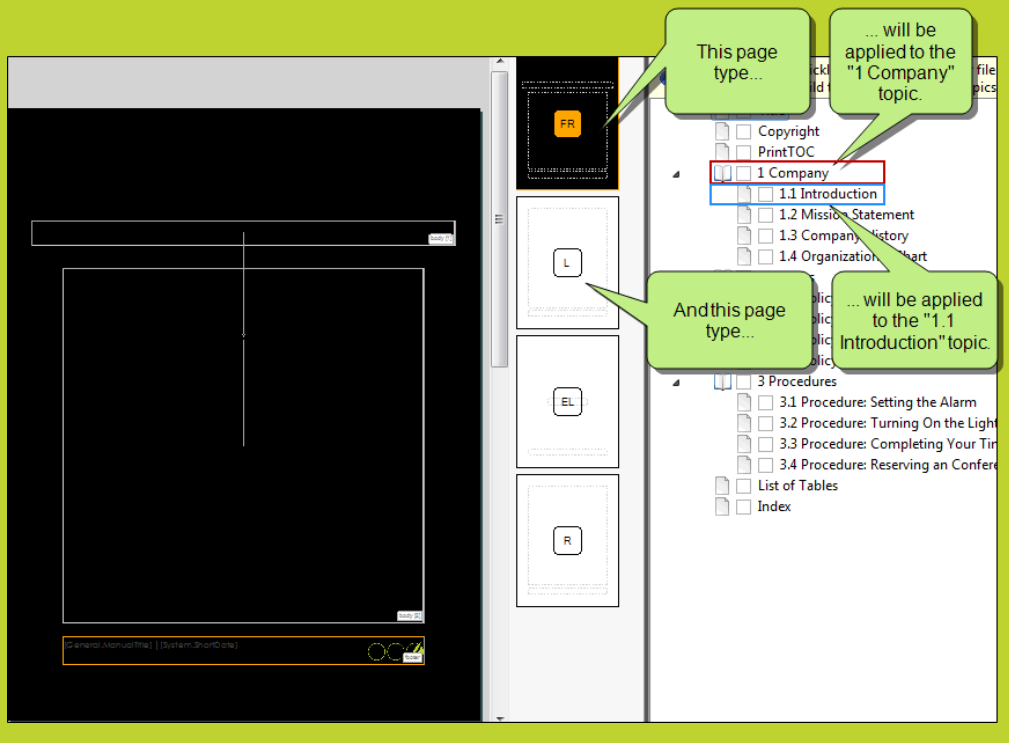


The other pages in the layout are used for Left, Empty Left, and Right pages. Each of these has a white background and different footer content.

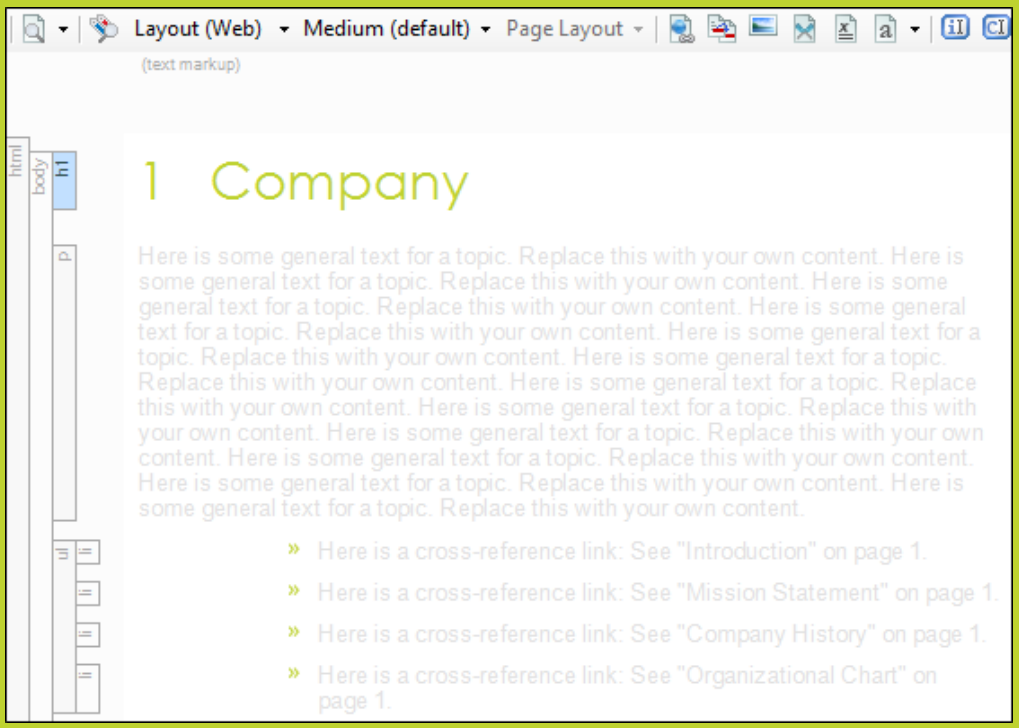
The topic immediately after "1 Company" is called "1.1 Introduction."



Although it can be difficult to determine which page types will use each topic (or even parts of a topic) in the generated output, you know enough about these two topics to get an accurate representation of them in the XML Editor. You know that the "1 Company" topic will use the First Right page type, and you also know that there is so little content in that topic that it will not continue to the next page. Furthermore, you know that the "1.1 Introduction" topic will not be displayed on the first page of the chapter, because you have placed a page break on the heading, ensuring that it begins on the second page of the chapter, which, in this case, uses a Left page type.

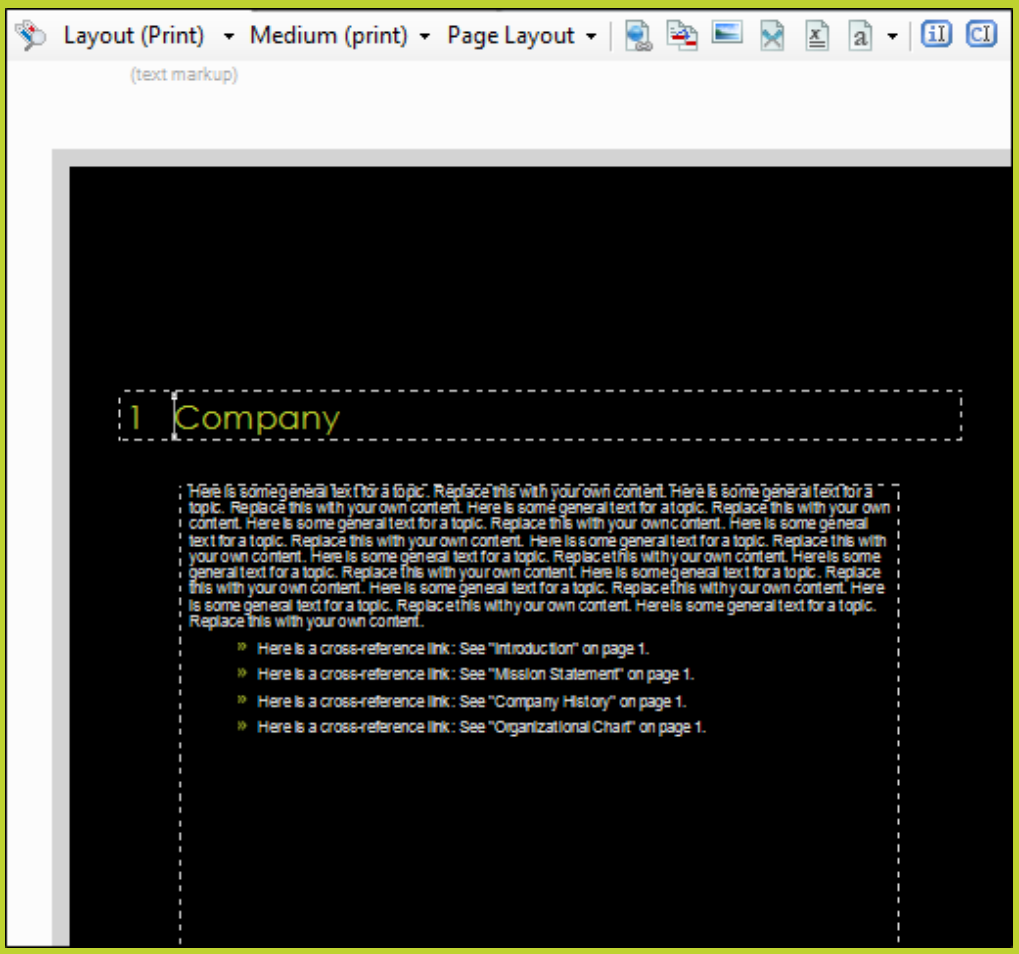


When you open the "1 Company" topic, it might look like this in the XML Editor initially:



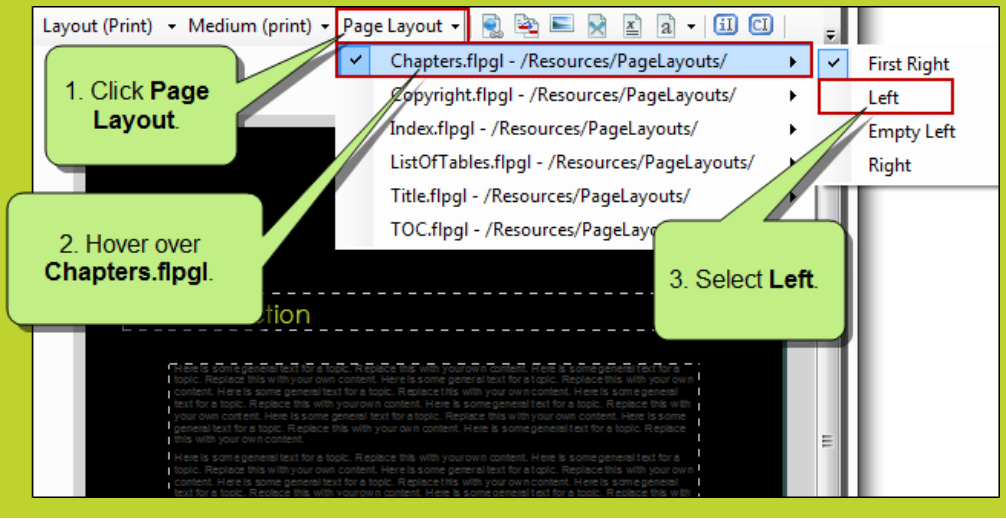
This certainly isn't what you had in mind. The topic looks this way because the XML Editor is currently set to the Web Layout mode and the default style medium, which are usually both intended for online output, not PDF. Therefore, you change to Print Layout mode and the Print style medium.

By doing this alone, you may or may not see the appropriate page type used for the topic. In the following example, the correct First Right page layout is being used to display the "1 Company" topic.

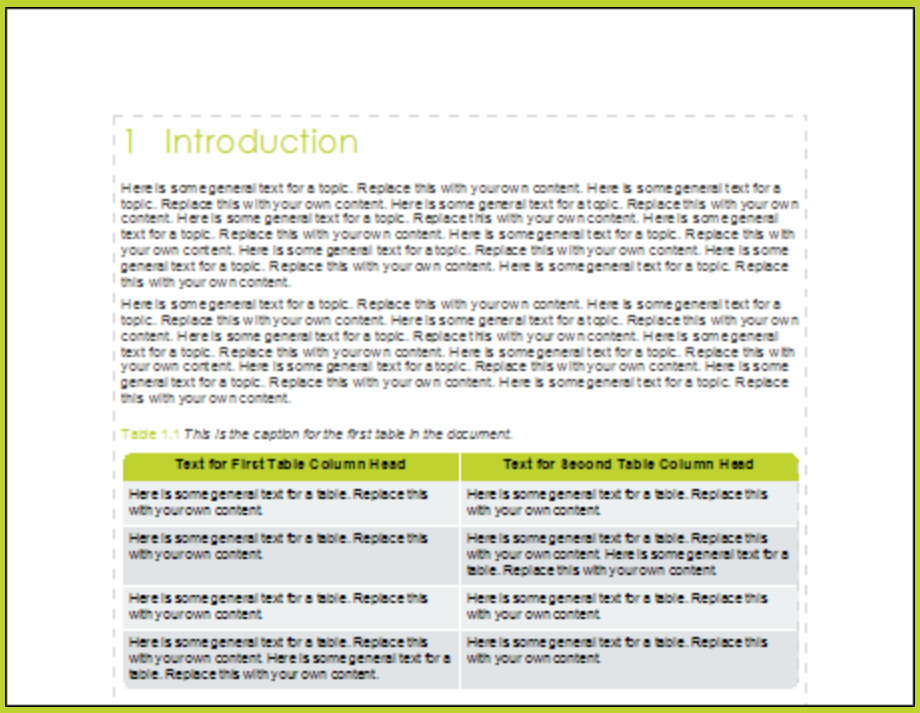


Now let's say you open the "1.1 Introduction" topic, which will display on the next page of the output, using the Left page type. Initially, it might look like this, with the First Right page type.

The topic doesn't look like it will in the output, because it's pointing to the wrong page type in the XML Editor. To fix this, you click the **Page Layout** drop-down in the local toolbar. After hovering over the **Chapters** page layout, which is already selected, a submenu shows the list of page types from that layout. You select **Left**.



As a result the topic displays in the correct page type. The main difference between this and the output is that an <h1> tag is being shown in the XML Editor (that's why the autonumber shows a 1). That's correct, but the PDF target has been configured so that this is automatically adjusted to an <h2> tag in the output because of the TOC depth (and the autonumber will adjust to 1.1). So it will be a bit different in the output, but the page type it's using in the XML Editor is now correct.



1 Introduction

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content. Here is some general text for a topic. Replace this with your own content.

Table 1.1 *This is the caption for the first table in the document.*

Text for First Table Column Head	Text for Second Table Column Head
Here is some general text for a table. Replace this with your own content	Here is some general text for a table. Replace this with your own content
Here is some general text for a table. Replace this with your own content	Here is some general text for a table. Replace this with your own content. Here is some general text for a table. Replace this with your own content
Here is some general text for a table. Replace this with your own content	Here is some general text for a table. Replace this with your own content
Here is some general text for a table. Replace this with your own content. Here is some general text for a table. Replace this with your own content.	Here is some general text for a table. Replace this with your own content

HOW TO SELECT A PAGE LAYOUT AND PAGE TYPE TO VIEW CONTENT

1. Open the content file (e.g., topic, snippet).
2. If the Print Layout mode is not already being used, click **Layout (Web)** in the local toolbar to switch to the Print Layout view.
3. In the local toolbar, click the **Page Layout** drop-down and select a page layout. If you want to select a particular page type included in that layout, select it from the submenu.

Note: Because topics can end up anywhere in your output, based on your settings, Flare won't know exactly how a particular page will look until you generate the output. Once you generate the output, Flare takes all of the information that you've given it in different places (e.g., Target Editor, outline TOC) and puts it all together according to your rules.

Note: You can get an even more accurate look at how a topic will look in the output by associating conditions with it while you are editing. This is similar to the feature that you can use to preview a document with certain conditions set. The difference is that this associates the conditions to the document as you edit it in the XML Editor. See "Associating Condition Tags to a File While Editing" on page 331.

Master Pages

This feature is supported in Adobe FrameMaker, Microsoft Word, and in all online outputs (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, and WebHelp Plus).

A master page is an element that you can create in your project in order to apply certain content to multiple topics. A master page is useful in online outputs, as well as print-based outputs. However, the benefits are somewhat different for online output than they are for print output. For example, you might use a master page in online output to apply features such as breadcrumbs, mini-TOCs, or footer text to multiple topics, or even all topics in a target. For print-based output, a master page allows you to determine page specifications (such as size or orientation) and to apply certain content (such as header text or page numbers) to many topics in a manual.

Page layouts are similar to master pages, but are more flexible and easier to use. The general rule of thumb is that page layouts are recommended for *print-based output* (when possible), and master pages continue to be the best method for automatically adding headers, footers, and breadcrumbs in multiple topics for *online output*. Another difference between page layouts and master pages is that page layouts can be used for any of the print-based outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML), whereas master pages can be used only for Microsoft Word and FrameMaker when creating print-based output. See "Page Layouts" on page 336.

Like all other files in Flare, a master page is an XML file. It has an .flmsp extension. The traditional location to store it in the Content Explorer is in the Resources\MasterPages folder. However, you can store it anywhere in the Content Explorer that you like.

What is Included in a Print Master Page?

A print master page uses a body proxy as a placeholder for content in your project, as well as page header and footer proxies for page numbers. When you generate the output, a body proxy is replaced with your topic content.Body proxies can also be used to hold information about the size, orientation, and margins for the printed pages.

In addition to proxies, you can add a wide range of content to master pages, similar to the way you would add content to a regular topic. For example, you can add text or variables above or below a body proxy to be used as header or footer content for the printed output.

How Many Print Master Pages Do I Need?

That depends on your situation. You might need only one master page, or you might need multiple master pages.

If the page settings and header/footer information on all of the pages of your document are consistent, you may be able to use just one print master page. It is possible to have one print master page with multiple body proxies on it. You might do this if you want different page settings (e.g., margins, page number settings) for first, even, and odd pages of a manual. In other words, each proxy can have a different page configuration. You can also add other content (e.g., text, images, Heading variables, Running Head variables) above or below the body proxy on a master page, and you can designate each of these sets of content to show up specifically on a first, even, or odd page.

However, you might not want to use just one master page for an entire document. Why? Because you might have some sections of your manual where you do not want any headers or footers at all (e.g., title page). Or you might want some sections of the manual to use one set of header or footer content and other sections to use different header or footer content.

Let’s say you are creating a manual for Adobe FrameMaker output and you want it to consist of the following.

- A title page with no headers or footers and different margins than the rest of the pages in the manual. The rest of the sections in the manual will all share the same margins.
- A TOC where you want the following: First page No header; footer with a Roman page number aligned right Odd pages A header with the TOC title aligned right; a footer with a Roman page number aligned right. Even pages A header with the TOC title aligned left; a footer with a Roman page number aligned left.
- Ten chapters where you want the following for each: First page No header; footer with a decimal page number aligned right Odd pages A header with the chapter title aligned right; a footer with a decimal page number aligned right. Even pages A header with the name of the manual aligned left; a footer with a decimal page number aligned left.
- An index where you want the following: First page No header; footer with a decimal page number aligned right Odd pages A header with the index title aligned right; a footer with a decimal page number aligned right. Even pages A header with the index title aligned left; a footer with a decimal page number aligned left.

In a situation such as this, you could create:

- One master page just for the title page.
- A second master page to be used by the TOC, all of the chapters, and the index.

  You can use a Heading variable (recommended) or Running Head variable to display the TOC, chapter, and index titles in one master page; that way, you don't need to type them manually in multiple master pages. To do this, you could use the h1 style in your topics for the first heading in the TOC, each chapter, and the index. Then simply insert the Level 1 Heading variable into the master page where you want the TOC, chapter, or index heading text to be shown (e.g., in a page header proxy). As long as you create a master page using that variable, and apply the new style class to the paragraphs containing your chapter titles, the headers in the output will adjust appropriately to display the correct chapter title. For more information see "Heading Variables" on page 219 and "Running Head Variables" on page 221.

  As for the page numbers, you might insert those into the master page by using a page footer proxy. Later in the print output development process, you can specify section breaks (i.e., tell Flare when to start a new "chapter" in the output). At that point, you can specify which page number format (e.g., Roman, decimal) to use for a particular section of the output.

Steps for Creating Print Master Pages

Following are the steps involved with creating a master page for print-based output.

1. **Add a Master Page** You can add as many master pages to a project as you want. A master page lets you apply consistent content to topics and is contained in a file with an .flmsp extension. The traditional location to store a master page in the Content Explorer is in the Resources\MasterPages folder. However, you can store it anywhere in the Content Explorer that you like. See "Adding a Master Page to a Project " on page 516.
2. **Open a Master Page** At any time, you can open a master page and make modifications to it. The master page displays in its own page of the XML Editor and remains accessible as you work. See "Opening Master Pages" on page 518.
3. **Add Proxies** Depending on the master page template that you select, you might already have one or more types of proxies in your master page. Some of these proxies are useful used for online output (e.g., breadcrumbs), whereas other proxies are used for printed output (or both online and print), including the following.
   - **Body Proxy** A body proxy, which can also be used for online output, is a placeholder that displays the content from your topics in the generated output. You can add one or more body proxies to a master page, depending on your needs. After inserting a body proxy, you can use it to customize the size, orientation, and margins for the printed pages. See "Adding and Editing Body Proxies for Print Output" on page 519.
   - **Glossary, Index, and TOC Proxies** These proxies let you automatically create a glossary, index, and TOC in your printed output based on features or content that you've already added to your project. However, rather than inserting these proxies into a master page, it is probably best to insert them into separate topics. For details, see "Creating a Glossary Manually for Print" on page 85, "Creating an Index Manually for Print" on page 143, and "Creating a TOC Manually for Print" on page 200.
   - **Mini-TOC Proxy** A mini-TOC proxy allows you to generate a portion of your table of contents (TOC) or topic headings at a particular location in the output. A mini-TOC proxy can be used for both online and print-based output. For online output, you can insert a mini-TOC proxy into a master page or a topic. For print-based output formats, you can insert a mini-TOC proxy into any topic where you want to generate a small TOC. For example, let's say you want the first page of each chapter in a manual to start out with a small TOC, showing the page numbers where subheadings occur within that chapter. In that case, you can insert a mini-TOC proxy into each topic that you plan to use as the beginning of each chapter. If you insert the proxy into a master page, each topic using that master page will have a mini-TOC. If you insert the proxy into certain topics only, mini-TOCs will be generated only within those particular topics. Similar to glossary, index, and TOC proxies, it is usually best to insert mini-TOC proxies into a topic, rather than a master page. See "Mini-TOCs" on page 167.
   - **Page Header and Footer Proxies** The page header and footer proxies let you insert content or automatic page numbering (specifically designated for the first page, even pages, or odd pages) in a master page. Use the page header proxy to insert content and page numbering above the body, and use the page footer proxy to insert content and page numbering below the body. When you insert one of these proxies, a

page number placeholder is added automatically. You can delete it if you do not want to include a page number in that location, or you can realign it (to the left, right or, center).

For information on adding these types of proxies into master pages, as well as adding regular content and page numbers within them, see "Adding Page Header and Footer Proxies" on page 525.

If you want to specify a starting page number or change the format (e.g., alpha, Roman, uppercase, lowercase), you can do so from the TOC Properties dialog when you specify section breaks for the output. See "Specifying Section Breaks and Master Pages" on page 552.

EXAMPLE

Let's say your printed output begins with a title page, copyright page, TOC and other front matter—followed by your chapters. If you want to make sure that the first page number does not display until the first page of your first chapter (not on any of the front matter pages), and that it shows "page 7," you need to specify a section break and master page at that location in the outline TOC (i.e., at the topic containing the beginning of the first chapter). From the same dialog tab where you specify a section break, you can indicate that the page numbering should start with 7.

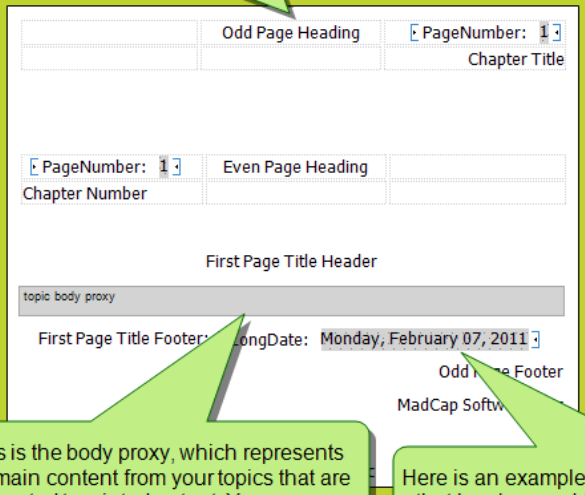
Note: If you need to remove a proxy from a master page, simply right-click on it and select **Delete**.

4. **Insert Heading or Running Head Variables** In addition to any type of regular content (e.g., text, images) and page numbers, you can insert Heading variables or Running Head variables into master pages. These types of variables are a great way to automatically include text (such as the first paragraph using an h1 style). See "Inserting Heading Variables Into Master Pages" on page 530 and "Inserting Running Head Variables Into Master Pages" on page 532.

E X A M P L E

Following is an example of a master page containing proxies for printed output.

In this section of the master page, a page header proxy has been added. It has been specified that this page header be displayed on odd pages of the printed output. Within this header, a table, text, and an automatic page number holder have been added. You can add any kind of content that you would normally add in a topic.



This is the body proxy, which represents the main content from your topics that are converted to printed output. You can use this proxy to customize the size, orientation, and margins for the printed pages. To adjust these settings, just right-click on the proxy and select "Edit Body Proxy." Then click the "Printer Page Properties" button.

Here is an example of a page footer proxy that has been added to a master page. This particular footer will be displayed on the first page of the printed output (or on the first page of a section if so specified). This footer contains text and a system variable displaying the date.

Adding a Master Page to a Project

You can add as many master pages to a project as you want. A master page lets you apply consistent content to topics and is contained in a file with an .flmsp extension. The traditional location to store a master page in the Content Explorer is in the Resources\MasterPages folder. However, you can store it anywhere in the Content Explorer that you like.

HOW TO ADD A MASTER PAGE TO A PROJECT

1. Do one of the following, depending on the part of the user interface you are using:
   - **(Recommended) Right-click** In the Content Explorer, right-click a folder and from the context menu select **New>Master Page**.

     > **Tip:** When adding a new file to the Content Explorer, the recommended method is to right-click on the folder in the Content Explorer and use the New menu option. This is the most efficient way to direct the new file to the folder where you want to store it. That's because the Add File dialog opens when you add a new content file, and this method ensures that the folder you want is already selected in that dialog.

   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Master Page**.
   - **Menu** Select **Project>Add Master Page**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Master Page** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

   - **New from existing** This lets you 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 the browse button ..., use the Open File dialog to find a file, and double-click it.

4. (Optional) The Folder field is automatically populated with the folder that has focus in the Content Explorer. If you want to place the file into a folder that you previously created in the Content Explorer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.

> **Note:** If you want to place non-topic files in a traditional default folder, you must first make sure that folder exists in the Content Explorer. If it does not exist, you can easily add it.

Non-Topic File Type	Traditional Default Folder in Content Explorer
Image	Resources\Images
Master Page	Resources\MasterPages
Multimedia	Resources\Multimedia
Page Layout	Resources\PageLayouts
Snippet	Resources\Snippets
Stylesheet	Resources\Stylesheets
Table Stylesheet	Resources\TableStyles

5. In the **File name** field, type a new name for the master page.
6. Click **Add**. The master page file is added. The XML Editor opens to the right, with the new master page shown.

Opening Master Pages

The traditional location to store a master page in the Content Explorer is in the Resources\MasterPages folder. However, you can store it anywhere in the Content Explorer that you like. At any time, you can open a master page and make modifications to it. The master page displays in its own page of the XML Editor and remains accessible as you work.

HOW TO OPEN AN EXISTING MASTER PAGE

1. Make sure the Content Explorer is open.
2. Expand the **Resources**, and double-click the **MasterPages** subfolder to open it (unless you have stored these files in a custom folder).
3. Do one of the following:
   - Locate and double-click the master page file (NameOfMasterPage.flmsp) that you want to open.

     OR
   - Locate and click the master page file (NameOfMasterPage.flmsp) that you want to open. In the local toolbar, click .

   The master page opens in its own page of the XML Editor.

Adding and Editing Body Proxies for Print Output

A body proxy, which can also be used for online output, is a placeholder that displays the content from your topics in the generated output. You can add one or more body proxies to a master page, depending on your needs. After inserting a body proxy, you can use it to customize the size, orientation, and margins for the printed pages.

HOW TO ADD AND EDIT A BODY PROXY IN A MASTER PAGE

1. From the Content Explorer, open the master page.
2. Do one of the following, depending on whether you need to add a new body proxy or simply edit an existing one.

   ADD A NEW BODY PROXY

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

   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Proxy>Body Proxy**.
   - **Menu** Select **Insert>Proxy>Insert Body Proxy**.

   EDIT AN EXISTING BODY PROXY

   - Right-click on the body proxy and select **Edit Body Proxy**.

   The Body Proxy dialog opens.
3. (Optional) In the dialog, you can click the down arrow in the **Stylesheet class** field and make a selection if you have created a style class specifically for body proxies (e.g., MadCap|bodyProxy.mybodyproxy). You might use a style like this, for example, if you want to add a border around all topic content. You can leave this field blank if you like.
4. Click **Printer Page Properties**.

5. In the Printer Page Properties dialog, you can specify the size, orientation, margins, and page number settings for the printed pages.

   By default, the settings will be applied to all pages. However, you can specify that the settings should be applied only to the first page, odd pages, or even pages. If so, you will want to have more than one body proxy in your master page, one for each page configuration.

   - **Page Size** Select a standard size for the page (e.g., Letter, Legal) or select **(custom)** to specify a non-standard width and height.
   - **Custom Width** If you selected "(custom)" from the Page Size field, enter a specific width for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Custom Height** If you selected "(custom)" from the Page Size field, enter a specific height for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
   - **Orientation** Select the orientation for the page. You can either select **Portrait** (if you want the pages to be taller than they are wide), or you can select **Landscape** (if you want the pages to be wider than they are tall).
   - **Start Number** If you want the first printed page associated with this master page to start at a particular page number, enter that number in this field.

     Note: Rather than specifying page number settings in this dialog, you may find it preferable to set them from the TOC Properties dialog when you specify chapter breaks. Using that dialog provides a bit more flexibility. See "Specifying Section Breaks and Master Pages" on page 552.

   - **Number Format** If you want the page numbers for this master page to take on a particular format (e.g., numbers without dashes, numbers with dashes, uppercase alpha, lowercase alpha, uppercase Roman, lowercase Roman), select it from this field.

Note: The -1- page format in this field is not supported in Adobe FrameMaker.

Note: Rather than specifying page number settings in this dialog, you may find it preferable to set them from the TOC Properties dialog when you specify chapter breaks. Using that dialog provides a bit more flexibility. See "Specifying Section Breaks and Master Pages" on page 552.

- **Page Type** Select the pages to which these settings will be applied (All Pages, Odd Pages, Even Pages, First Page). The default is to apply the settings to all pages using the master page. If you want all of the pages in your output to share the same settings (page size, margins, etc.), you only need one body proxy in the master page. However, if you want different pages to have different settings, you can add a body proxy page for each configuration. Then, edit the settings for a particular body proxy for specific pages (e.g., odd pages), and use this field to specify which pages the settings pertain to.

EXAMPLE

Let's say that you want the first page in the output to use certain margin settings, you want the odd pages to use a different set of margins, and you want the even pages to use yet another set of margins. Therefore, you would add three body proxies to the master page, and you would edit each of these proxies accordingly—one for the first page, one for odd pages, and one for even pages.

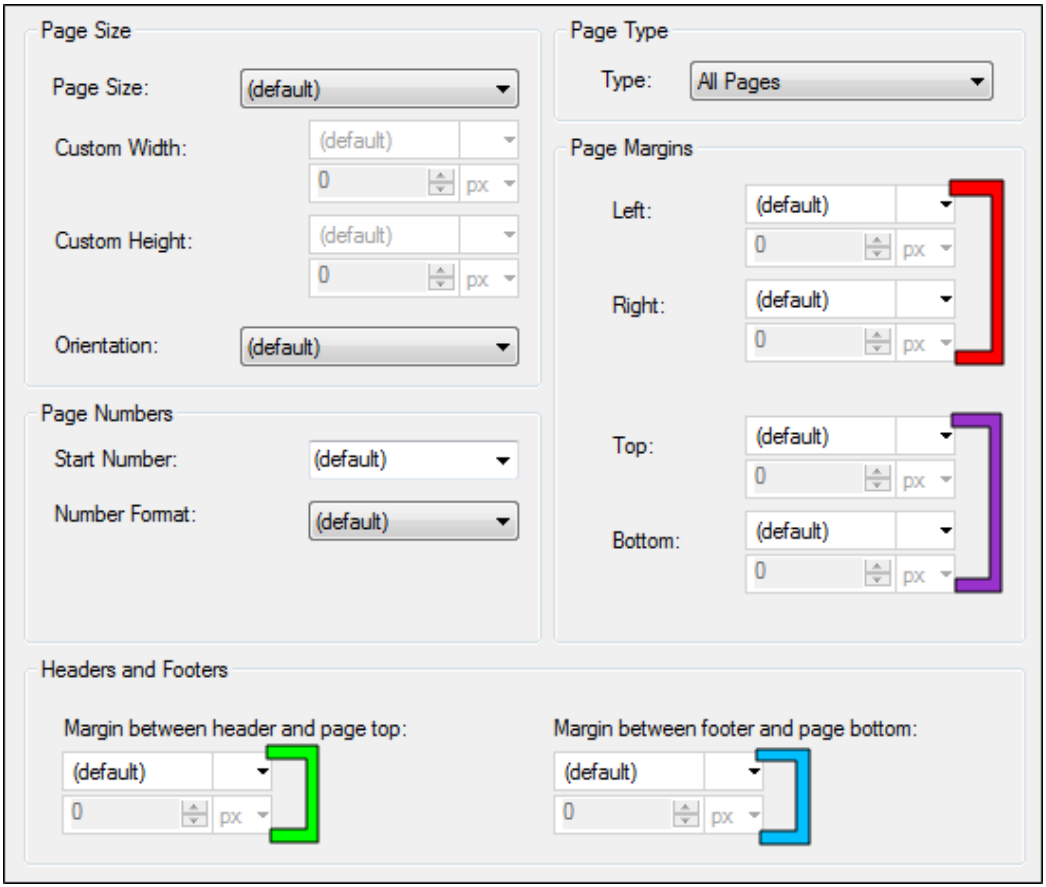
Note: This feature pertains to Word output only.

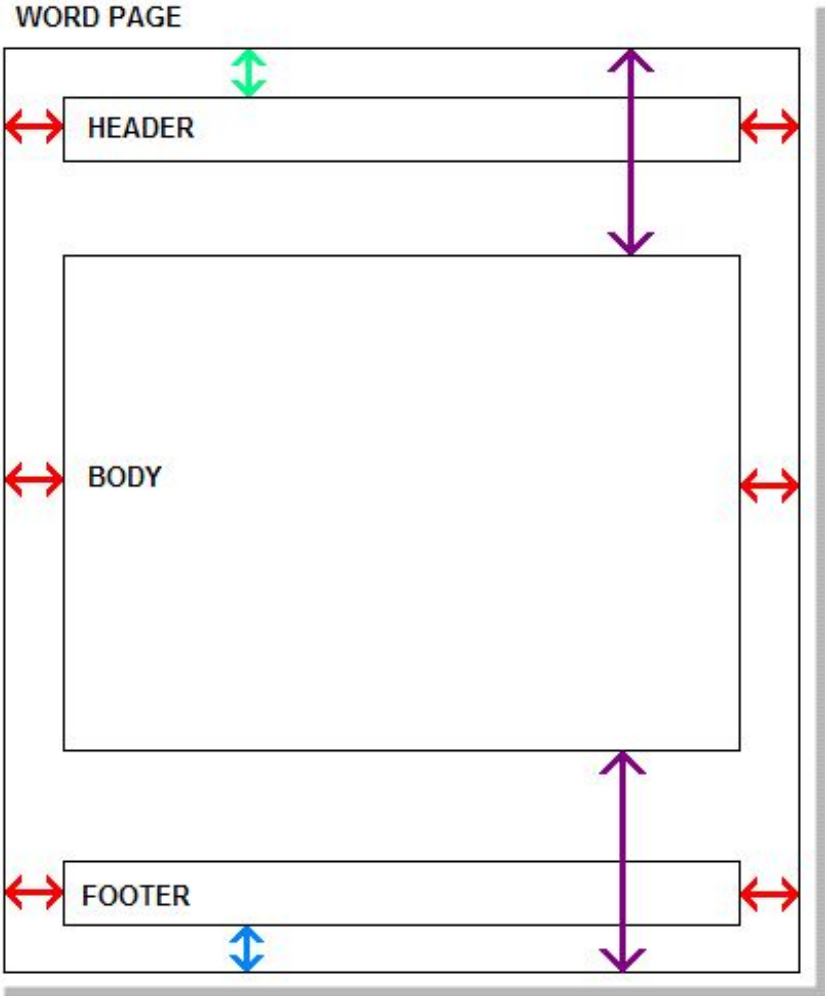
- **Left** Enter the length of the left margin for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
- **Right** Enter the length of the right margin for the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
- **Top** Enter the length of the top margin for the page. This is the space from the top of the body content to the top edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a

value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.

- **Bottom** Enter the length of the bottom margin for the page. This is the space from the bottom of the body content to the bottom edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
- **Margin between header and page top** Enter the length of the margin from the top of the header to the top edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.
- **Margin between footer and page bottom** Enter the length of the margin from the bottom of the footer to the bottom edge of the page. First you need to select **Length** in the top drop-down list. You can then enter a value in the lower-left area and choose from several different units of measurement (points, pixels, centimeters, etc.) in the lower-right area.

Following is the Printer Page Properties dialog. After it is a schematic of a printed page in Word. For this example, we've added colored lines in the dialog and corresponding arrows in the Word page to show you which areas of the printed page are influenced by the different sections of the dialog.





6. In the Printer Page Properties dialog, click **OK**.
7. In the Body Proxy dialog, click **OK**. The proxy is added to the master page.
8. Click to save your work.

Adding Page Header and Footer Proxies

This feature is supported in Adobe FrameMaker and Microsoft Word output.

The page header and footer proxies let you insert content or automatic page numbering (specifically designated for the first page, even pages, or odd pages) in a master page. Use the page header proxy to insert content and page numbering above the body, and use the page footer proxy to insert content and page numbering below the body. When you insert one of these proxies, a page number placeholder is added automatically. You can delete it if you do not want to include a page number in that location, or you can realign it (to the left, right or, center).

HOW TO ADD PAGE HEADER AND FOOTER PROXIES

1. From the Content Explorer, open the master page.
2. Place your cursor at the location in the master page where you want to add a proxy.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Proxy** section select **Page Header** or **Page Footer**.
   - **Menu** Select **Insert>Proxy>Insert Page Header** or **Insert>Proxy>Insert Page Footer**.

   Depending on the type of proxy you select, either the Page Header dialog or Page Footer dialog opens.
4. In the dialog, click the down arrow in the **Stylesheet class** field and make a selection. Select either **Odd Page**, **Even Page**, or **First Page** (depending on whether you want that particular header or footer content to be displayed on the odd pages, even pages, or first page of the printed output).

Note: If you want a page footer or header to always display on certain page types by default, you can specify this in your stylesheet (using the mc-feader-type property). Therefore, that page type will always be used as the default setting, unless you override it at the spot where you have inserted the proxy. For more information see the online Help or the Flare *Styles Guide*.

Note: You do not need to limit yourself to one page header or one page footer per master page. If necessary, you can add three page headers (one for first pages, one for odd pages, and one for even pages), and you can add three page footers (one for first pages, one for odd pages, and one for even pages). This way, you only need to use one master page to specify what header content is to be used on which pages of the printed output.

5. Click **OK**.

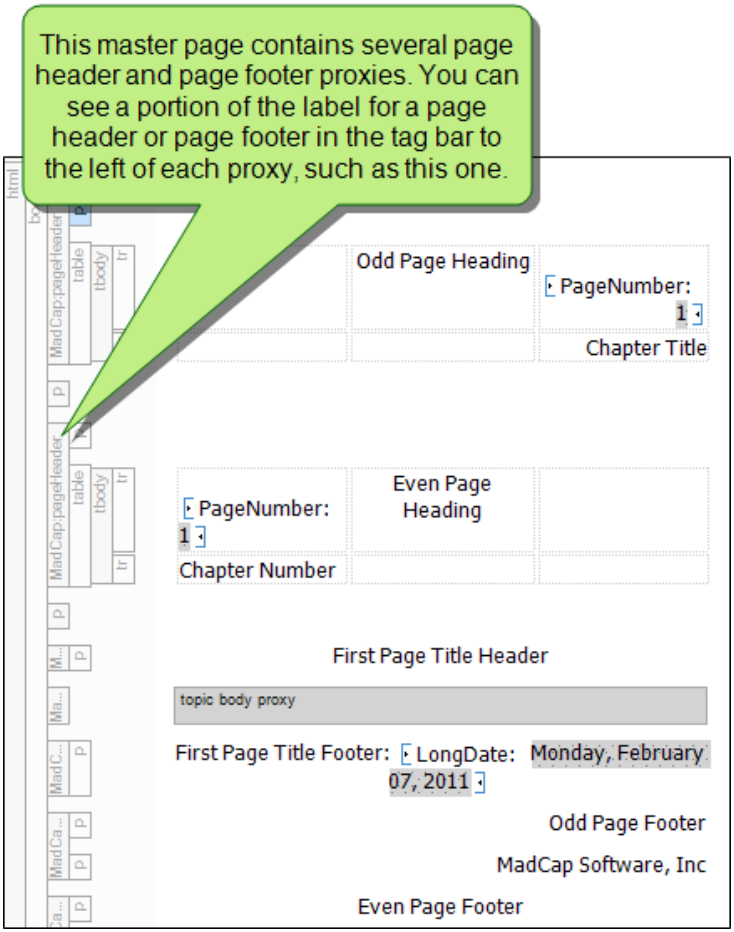
   The proxy is added to the master page. A holder for page numbering is automatically added. However, this does not mean that you *must* use page numbering for that header or footer. You can delete the page numbering holder if you want. It also does not mean that you cannot add anything else to the header or footer. You can add any content that you want to that header or footer by doing the following.

   a. Place your cursor inside a particular page header or page footer proxy.
   b. Type or insert the content as you normally would in a regular topic.

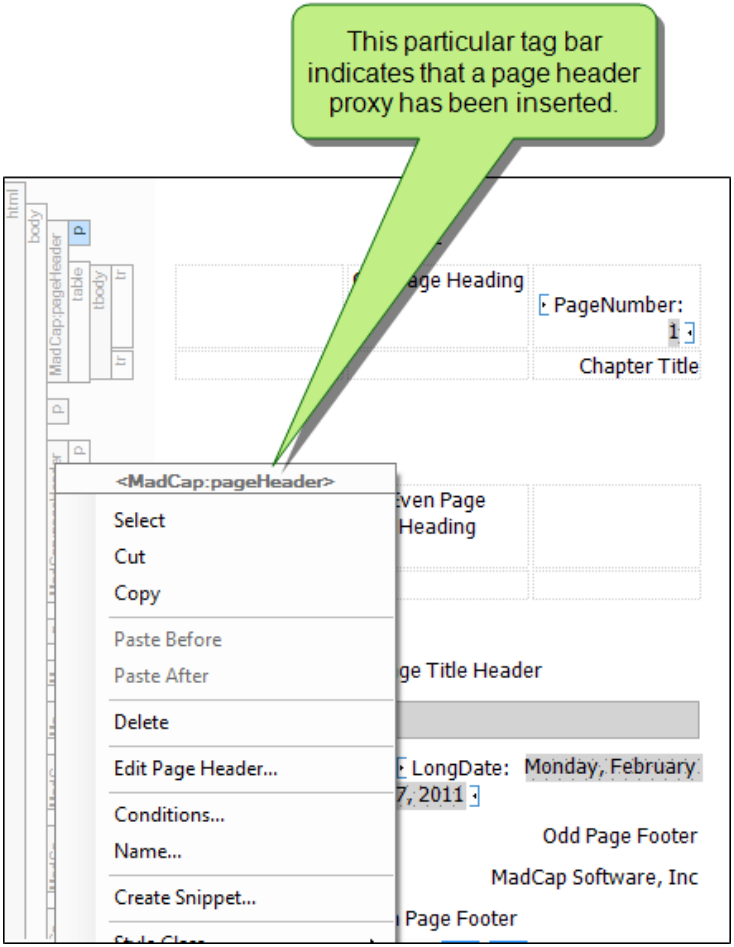
HOW TO TELL IF YOUR CURSOR IS PLACED WITHIN A PAGE HEADER OR FOOTER PROXY

Turn on the tag bars in the master page by clicking in the local toolbar at the bottom of the XML Editor.

The tag bar to the left of the proxy will display the label (or at least the first part) for a "MadCap|pageHeader" or "MadCap|pageFooter."

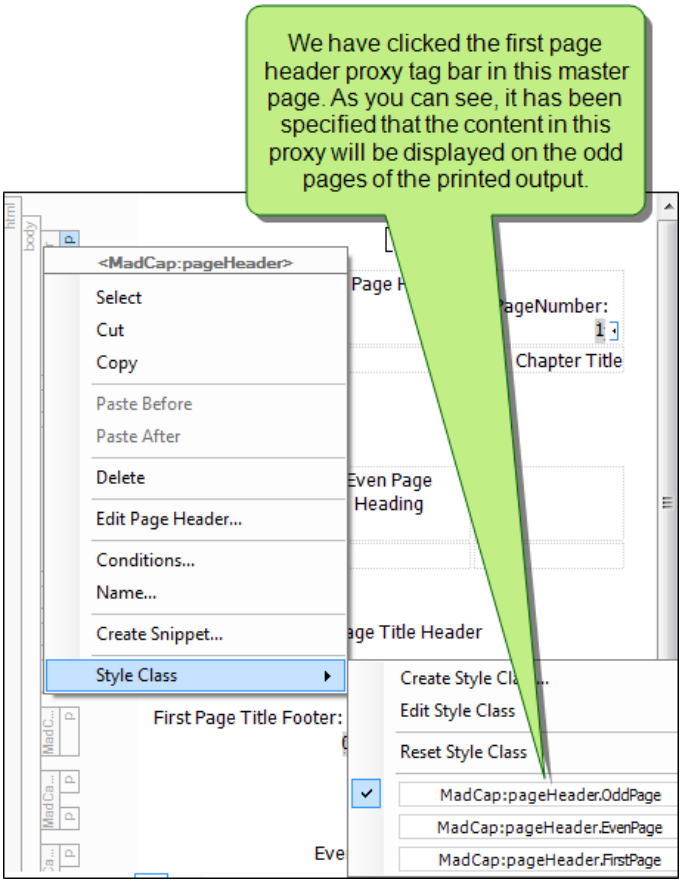


You can right-click on the tag bar to bring up a context menu. The menu confirms the type of proxy by showing the page header or page footer label at the top.



HOW TO TELL WHICH PAGE(S) WILL DISPLAY PAGE HEADER OR FOOTER CONTENT

To determine whether the page header or page footer will be displayed on odd pages, even pages, or the first page of the printed output, select **Style Class** in the context menu. The appropriate page designation will have a check mark next to it.



6. Click to save your work.

Inserting Heading Variables Into Master Pages

In addition to any type of regular content (e.g., text, images) and page numbers, you can insert Heading variables or Running Head variables into master pages.

HOW TO INSERT A HEADING VARIABLE INTO A MASTER PAGE

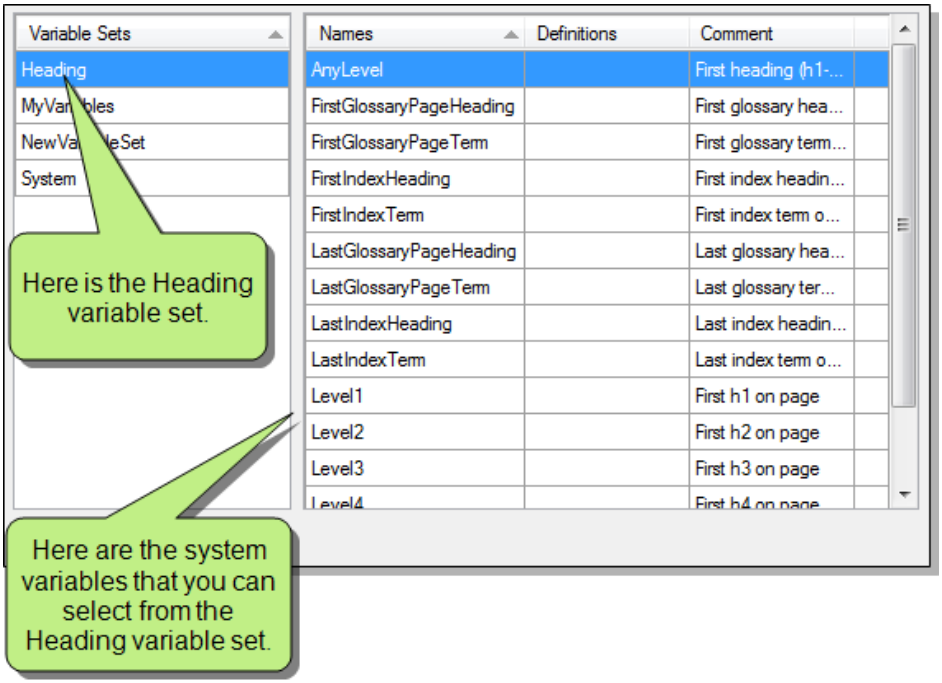
1. From the Content Explorer, open the master page.
2. Place your cursor inside a particular page header or page footer proxy.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single-Source** section select **Variable**.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** On your keyboard press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.
4. Select the **Heading** variable set.
5. Select the variable you want to add:
   - **AnyLevel** Automatically displays the text in the first heading on a page that uses any of the <h1> through <h6> styles.
   - **Level1** Automatically displays the text in the first heading on a page that uses the <h1> style tag.

     E X A M P L E

     Let's say you are using the <h1> style tag only for your chapter titles at the beginning of each chapter. If you insert the Heading.Level1 variable into the heading frames in the page layout that you are using for chapters, the appropriate chapter title will display automatically at the top of each chapter in the output.
   - **Level2** Automatically displays the text in the first heading on a page that uses the <h2> style tag.
   - **Level3** Automatically displays the text in the first heading on a page that uses the <h3> style tag.
   - **Level4** Automatically displays the text in the first heading on a page that uses the <h4> style tag.
   - **Level5** Automatically displays the text in the first heading on a page that uses the <h5> style tag.
   - **Level6** Automatically displays the text in the first heading on a page that uses the <h6> style tag.

Note: The glossary and index variable options are available only in Adobe PDF, Microsoft XPS, and XHTML output.



6. Click **OK**. The variable is added to the master page.
7. Click to save your work.

Inserting Running Head Variables Into Master Pages

In addition to any type of regular content (e.g., text, images) and page numbers, you can insert Heading variables or Running Head variables into master pages.

HOW TO INSERT A RUNNING HEAD VARIABLE INTO A MASTER PAGE

1. Add a variable set to the project, selecting the Running HF template.
2. From the Content Explorer, open the master page.
3. Place your cursor in the master page where you want to insert a Running head variable (i.e., in a page header or page footer proxy). See "Adding Page Header and Footer Proxies" on page 525.
4. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Insert** ribbon. In the **Single-Source** section select **Variable**.
   - **Menu** Select **Insert>Variable**.
   - **Local Toolbar** Click .
   - **Keyboard Shortcut** On your keyboard press **CTRL+SHIFT+V**.

   The Variables dialog opens, with the variable set(s) on the left and the variables associated with the selected set on the right.
5. On the left side of the dialog, select the Running Head variable set that you created.
6. On the right side of the dialog, select the variable that you want to insert. Unless you edit the variable definitions to change the style classes within them, each variable is associated with one of the six heading styles (<h1> through <h6>). When you insert a Running Head variable into a master page, Flare will insert the text from the first occurrence of the specified style on that page. If it doesn't find any text using that style, it will use the text from the previous occurrence of that style.

   E X A M P L E

   If you want the header in chapters to display content that is using the h1 style (perhaps you are using this style to display the chapter title for your output), select the **Running H/F 1** variable. The header will then display the first h1 content that it finds in the document (e.g., "My First Chapter Title"). When the next occurrence of the h1 style appears on another page, the heading changes to display that text (e.g., "My Second Chapter Title"), and so on.

7. Click **OK**. The Running Head variable is added to the master page.
8. Click to save your work.

CHAPTER 7

Creating an Outline TOC

Creating a table of contents in Flare can be very easy to do for both online and print output. For online output, it can be as easy as dragging topics into the TOC Editor. You can create a TOC by adding books and items with links. The links usually point to topics, but for online outputs they can also point to external files, other Help systems, and movies. You put all of these books and items in a structure that you think would be useful for the individual. End users then browse through a TOC to find information.

You have the option to customize your TOCs in lots of ways, getting as fancy as you want. However, there are some things you should know. The most important thing to understand is that the TOC files that you see in the Project Organizer work differently for online output than they do for print-based output. For online outputs, TOC files are exactly as their name suggests; they are files that create TOCs in the output. But for print-based outputs, that same TOC file functions more like an outline. The element that actually generates a TOC in print-based output is called a "proxy." You can manually create that proxy yourself, or you can select an option in the Advanced tab of the Target Editor and let Flare do it all for you. There are pros and cons for both methods.

You can see both online and print TOCs in action by looking at Flare's many project templates on the Start Page. Typically, the templates labeled as "Basic" use the easy auto-generation method for creating print TOCs, and the "Advanced" templates use the more robust method by making use of a combination of a TOC proxy, styles, and page layouts.

This chapter discusses the following:

Steps for Using an Outline TOC 535
Adding an Outline Table of Contents 536
Opening an Outline Table of Contents 538

Including Print Topics in an Outline TOC 539
Specifying Chapter and Page Layout Breaks 542
Specifying Section Breaks and Master Pages 552
Autonumbering Flow for Output 556
Associating a Master Table of Contents with a Project 559
Associating a Master Table of Contents with a Target 560

Steps for Using an Outline TOC

Following are the tasks necessary for including an outline TOC in your project.

1. **Add/Open TOC** If you do not want to use the initial TOC often provided by Flare, you can add one. And you can open an existing TOC from the Project Organizer whenever you need to work on it. See "Adding an Outline Table of Contents" on the next page and "Opening an Outline Table of Contents" on page 538.
2. **Include Print Topics in Outline TOC** You need to make sure that all of the topics to be included in your printed output (those that are *only* for printed output, as well as those that are for printed *and* online output) are added to an "outline TOC." See "Including Print Topics in an Outline TOC" on page 539.
3. **(Optional) Specify Chapter Breaks With TOC** If you are creating print-based output with page layouts, you will likely want to complete this task. After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time. See "Specifying Chapter and Page Layout Breaks" on page 542.
4. **(Optional) Specify Section Breaks With TOC** If you are creating Word or FrameMaker output with master pages (or if you want to use "section" autonumbers), you may want to complete this task. After you create a master page for print output and configure it as necessary, you need to associate the master page with the appropriate content. In many cases, you will probably want to associate multiple master pages with various entries in your outline TOC (so that different master pages can be used for different parts or "chapters" in a manual). Otherwise, you would associate a single master page with an entire target; in that case, the same page layout will be applied to all topics in that target. Whenever you associate a master page with a TOC entry, you must first create a section break in order to do so. See "Specifying Section Breaks and Master Pages" on page 552.
5. **(Optional) Associate Master TOC With a Project or Target** In most situations, you will have one TOC that you use for a particular output (target). In that case, you simply associate the appropriate TOC with the target. If you have multiple TOCs that you want to include in the same project or output target, the TOC that you associate with the project or target serves as the "master" TOC. In your master TOC, you have the option of creating links to the other TOC that you want to include in the output. If you do not select a TOC, Flare will use the first one in the project (if there is more than one). If you have specified a master TOC at the project level and another at a target level, the TOC at the target will take precedence.See "Associating a Master Table of Contents with a Project" on page 559 and "Associating a Master Table of Contents with a Target" on page 560.

Adding an Outline Table of Contents

Factory templates provide you with at least one TOC, which you further enhance using the TOC Editor. You may decide to add more TOCs to the project so that you can have different TOCs for different outputs. The steps below show you how to add a new TOC.

HOW TO ADD AN OUTLINE TABLE OF CONTENTS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Table of Contents**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.
   - **Menu** Select **Project>>Add Table of Contents**.
   - **Right-Click** In the Project Organizer, right-click on the **TOCs** folder and from the context menu select **Add Table of Contents**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **TOC** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     Note: In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

» **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the 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 TOC.
6. Click **Add**. The TOC is added to the TOCs folder in the Project Organizer. The TOC Editor opens to the right, with the page for the new TOC shown and some initial TOC books and entries added for you.
7. Click to save your work.

Opening an Outline Table of Contents

You can quickly open a TOC anytime you need to work on it.

HOW TO OPEN THE MASTER TOC

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

- **Ribbon** Select the **Project** ribbon. In the **Primary Files** section select **Primary TOC**.
- **Project Toolbar** Click Master TOC.

  To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
- **Keyboard Shortcut** Press **CTRL+F8**.

HOW TO OPEN A SPECIFIC TOC

1. Make sure the Project Organizer is open.
2. Double-click the **TOCs** folder. The TOC(s) in your project are displayed.
3. Double-click the TOC that you want to open. The TOC opens in the TOC Editor to the right.

Including Print Topics in an Outline TOC

You need to make sure that all of the topics to be included in your printed output are added to an outline table of contents (TOC). We refer to it as an "outline TOC" because for print-based output it really serves more as an outline than a TOC. You have a couple of options:

- Create a new TOC just for your printed output (most common method).

  OR

- Incorporate the print topics into a shared TOC (along with topics for other outputs) and use condition tags.

HOW TO CREATE A NEW TOC (JUST FOR YOUR PRINT-BASED OUTPUT)

1. Add a new TOC to the project (see page 536).
2. Make sure the Content Explorer is open.
3. (Optional) If you want to select and add multiple topics to the TOC at the same time (as opposed to one topic at a time), complete these steps.
   a. In the local toolbar of the Content Explorer, click the **Show Files** button. The Content Explorer splits into two halves.
   b. On the right half of the Content Explorer, find and select the folder and topic files that you want to include in the TOC. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

> **Note:** Make sure you do not select the Resources folder in the Content Explorer, which holds your ancillary content files (e.g., images, stylesheets). If you do, that folder and its contents will also be included in the TOC.

4. Drag the topics that are to be included in the printed manual from the Content Explorer to the appropriate locations in the TOC Editor.

E X A M P L E

Drag the topic that contains a TOC proxy (for displaying a generated TOC) near the top of the TOC (since you will want the TOC in your printed output to be placed near the front of it). Drag the topic that contains an index proxy (for displaying a generated index) near the bottom of the TOC (since you will want the index to be placed at the end of your printed manual).

Also, you can use the buttons in the TOC Editor local toolbar to add elements (e.g., books, topic pages) to the TOC and to determine how they behave (e.g., link them to topics).

5. Click to save your work.

HOW TO INCORPORATE THE PRINT TOPICS INTO A TOC (TO BE SHARED WITH ANY OTHER OUTPUT)

1. Open the TOC (page 538).
2. Make sure the Content Explorer is open.
3. (Optional) If you want to select and add multiple topics to the TOC at the same time (as opposed to one topic at a time), complete these steps:

   a. In the local toolbar of the Content Explorer, click the **Show Files** button. The Content Explorer splits into two halves.

   b. On the right half of the Content Explorer, find and select the folder and topic files that you want to include in the TOC. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

   > **Note:** Make sure you do not select the Resources folder in the Content Explorer, which holds your ancillary content files (e.g., images, stylesheets). If you do, that folder and its contents will also be included in the TOC.

4. Drag the topics that are to be included in the printed manual from the Content Explorer to the appropriate locations in the TOC Editor.

   > **E X A M P L E**
   >
   > Drag the topic that contains a TOC proxy (for displaying a generated TOC) near the top of the TOC (since you will want the TOC in your printed output to be placed near the front of it). Drag the topic that contains an index proxy (for displaying a generated index) near the bottom of the TOC (since you will want the index to be placed at the end of your printed manual).

   Also, you can use the buttons in the TOC Editor local toolbar to add elements (e.g., books, topic pages) to the TOC and to determine how they behave (e.g., link them to topics).

5. Create condition tags for your topics (see page 327).
6. Apply these condition tags to the appropriate entries in your print TOC. The easiest way to do this is to double-click an entry in the TOC and use the Conditional Text tab in the Properties dialog to choose the condition tag(s) to be associated with that entry. For more details, see the online Help.
7. Associate the condition tags with your print target (see page 333).

Specifying Chapter and Page Layout Breaks

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time.

Following are steps for creating chapter breaks and associating page layouts with TOC entries. Before completing these steps, you must first create an outline TOC. See "Including Print Topics in an Outline TOC" on page 539.

In addition to specifying page layouts, chapter breaks also allow you to generate output in multiple files (as opposed to just one file), although a "multi-chapter" output can be also contained in a single file, depending on the output type. With chapter breaks, you can also take advantage of autonumbering at the chapter level and automatically include endnotes at the end of each chapter. Finally, setting a chapter break can have an effect on whether a generated TOC can be included in the output (if you are producing Word or FrameMaker output).

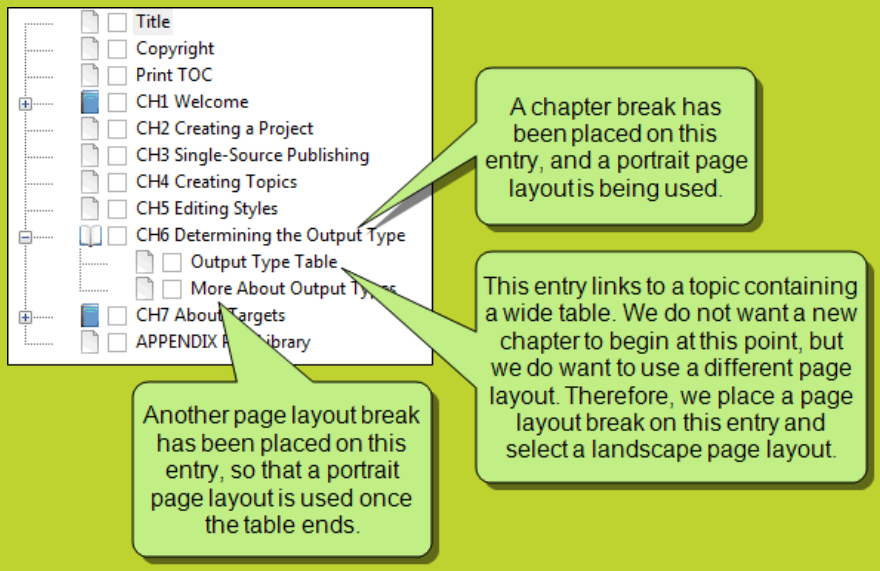
HOW TO SPECIFY CHAPTER BREAKS AND PAGE LAYOUTS

1. Make sure the Project Organizer is open.
2. Double-click the TOCs folder.
3. Double-click the TOC that you plan to use for the printed output. The TOC Editor opens to the right.
4. Select the entry in the TOC where you want to insert a chapter or page layout break.
5. In the local toolbar, click .
6. Click the **Printed Output** tab.
7. In the **Break Type** field, select one of the following.
   - **None** This prevents a break from being used for the outline TOC entry.
   - **Chapter Break** This creates a chapter break on the outline TOC entry. You can then select the page layout to be used until another break occurs in the outline TOC. The chapter break also allows chapter autonumber settings to be applied.

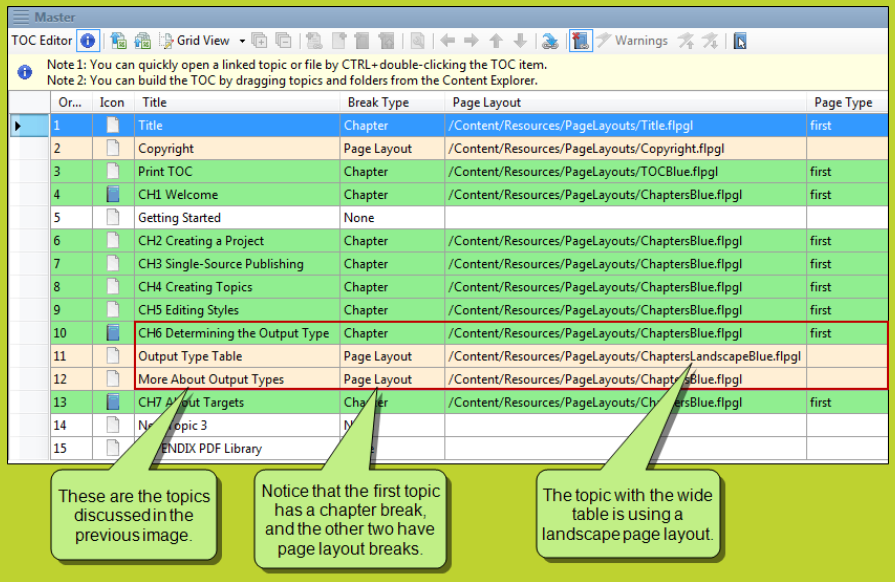
» **Page Layout Break** This lets you change the page layout used, starting at a certain outline TOC entry, without creating a new chapter. You might use this option, for example, if you have a wide table in the middle of a chapter and need to switch to a landscape page layout on the pages displaying that table.

E X A M P L E

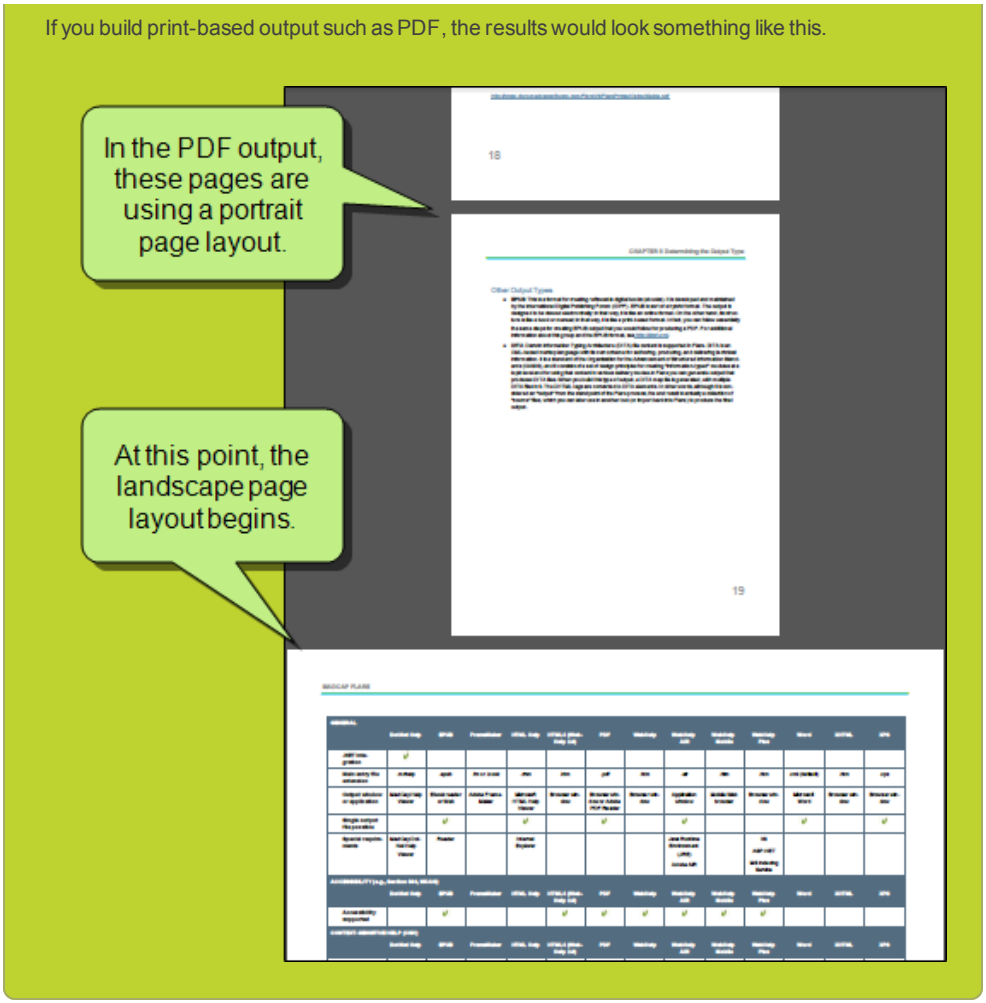
Let's say you have an outline TOC for print-based output that looks like this.



This is actually easier to see in Grid View (click the Tree View button in the local toolbar of the TOC Editor to switch views), and by customizing the columns to remove those you don't want to display.



Or...	Icon	Title	Break Type	Page Layout	Page Type
1		Title	Chapter	/Content/Resources/PageLayouts/Title.flpgl	first
2		Copyright	Page Layout	/Content/Resources/PageLayouts/Copyright.flpgl	
3		Print TOC	Chapter	/Content/Resources/PageLayouts/TOCBlue.flpgl	first
4		CH1 Welcome	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
5		Getting Started	None		
6		CH2 Creating a Project	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
7		CH3 Single-Source Publishing	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
8		CH4 Creating Topics	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
9		CH5 Editing Styles	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
10		CH6 Determining the Output Type	Chapter	/Content/Resources/PageLayouts/ChaptersBlue.flpgl	first
11		Output Type Table	Page Layout	/Content/Resources/PageLayouts/ChaptersLandscapeBlue.flpgl	
12		More About Output Types	Page Layout	/Content/Resources/PageLayouts/Chapt[illegible]sBlue.flpgl	
13		CH7 A[illegible]ut Targets	Cha[illegible]er	/Content/Resources/PageLayouts/Ch[illegible]rsBlue.flpgl	first
14		N[illegible]opic 3	N[illegible]		
15		[illegible]ENDIX PDF Library	[illegible]		



8. If you selected a chapter or page layout break type, click in the **Page Layout** field labeled and select the layout that you want to use.

9. (Optional) If you want a particular page type from the layout to be used for the *first* page that is displayed, select it from the **Page Type** field. Depending on the pages that have been included in the selected page layout, any of the following may be available in this drop-down field.

   For details and graphics that show how breaks and page types work together to create output that flows the way you want, see "Page Type Flow Scenarios" on page 379.

   - **(default)** This lets Flare choose the default page type for you, depending on the type of break you created.
   - **(continue L/R)** Select this option to specify a Left/Right page sequence, using whichever page comes next in the normal flow.
   - **(continue FL/FR)** Select this option to continue the First Left/First Right page sequence, using whichever page comes next in the normal flow.
   - **Title** Select this type if you want the settings to be applied to the first page in your output, which typically displays the manual title. If you include an Empty page type in your page layout, the title page in the output will be followed by the empty page. It is not mandatory that you use this page type for a title. Instead, you can use one of the other types, such as Normal.
   - **First** Select this type for the first page of a new chapter. This page type can be used in a situation where you are creating a simple configuration and you are not concerned with left and right pages (e.g., a document for electronic distribution only). In most cases, a First page type would be followed by Normal pages.
   - **First Left** Select this page type if you want chapters to begin on left-sided pages, and you need a different look for those pages than would be used for a regular left page.
   - **First Right** Select this page type if you want chapters to begin on right-sided pages, and you need a different look for those pages than would be used for a regular right page.
   - **Left** Select this type if you want the settings to be applied to a page in the output when it appears on a left (or even) page (e.g., page 42).
   - **Right** Select this type if you want the settings to be applied to a page in the output when it appears on a right (or odd) page (e.g., page 43).
   - **Normal** Select this type if you do not want a Left/Right type of page flow, but instead just want the same layout on every page, perhaps like a screenplay.

   Note: Empty page types are not shown in this field. If you are using empty pages in your PDF or XPS output, make sure your page layout has an empty page type and the target is set to automatically apply empty pages when necessary. To do this, open the target. On the **Advanced** tab, click **Inject empty pages as needed to ensure TOC nodes start on their selected pages**. This is recommended

over the older "Auto-end on left page" option. See "Using Empty Pages" on page 375.

10. (Optional) If you want to specify a particular file name for the chapter being created, enter it in the **Chapter File Name** field.

    For PDF, XPS, and Word outputs, the default setting is to create a single file for the entire output. However, you can use an option in the Advanced tab of the Target Editor to generate a new PDF, XPS, or Word file for each chapter break. The Chapter File Name field in the Properties dialog would be applicable if you decide to generate multiple PDF, XPS, or Word files instead of just one.

11. (Optional) In the **Page Number** section, you can specify how you want page numbers treated (if you have inserted them into the page layout).

    - **Reset to** If you want the first page number in the chapter to begin at a specific number, you can select this option and enter the number in the field. If you select the "text" option from the Format field, you can type any kind of text into this field. That text will be used instead of numbering.
    - **Format** If you want a particular format of numbering to be used (e.g., decimal, upper Roman, lower alpha, text), select it from this drop-down. If you select the "text" option, you can type any kind of text into the "Reset to" field. That text will be used instead of numbering.
    - **Increment number** If you want the first page number in the page layout to continue from the previous layout, you can select this option.

    Note: If you want to include autonumbers in the page numbering (e.g., the chapter autonumber followed by a period and then the page number), you can do so using a couple of different methods. With the first method, you can insert the appropriate autonumber variable next to the page number variable in a page layout (see "Chap/Sec/Vol Variables in Frames" on page 430). With the second method, you can use the "Reset to" and "Format" fields on this tab. First, you can select "text" from the Format field. Then in the "Reset to" field, you can enter the appropriate codes for the autonumbering. For example, if you want each page to show the chapter autonumber followed by a period and the page number, you would type {chapnum}.{n} in the "Reset to" field. Using this second method ensures that your page autonumbers are also displayed accurately in a print index. See "Page Autonumbers in Print Indexes" on page 149.

12. Click **OK**.

13. Repeat these steps for each area in the content where you want to specify a new chapter or page layout break.

> **Tip:** If you want to apply the same settings to many TOC entries, you can hold down the CTRL or SHIFT key and select those entries. Then open the Properties dialog and specify the settings.

> **Note:** You do not have to follow these steps for every single TOC entry within that chapter—only for the TOC entries where you want a chapter or page layout break. The page layout will be used in the print-based output starting at that location in the content and continuing to the end of the document, or until it comes across another chapter or page layout break.

14. Click to save your work.

HOW CHAPTER BREAKS AFFECT THE VARIOUS OUTPUT TYPES

When creating chapter breaks, you should keep the following in mind.

NATIVE PDF OR XPS OUTPUT

The following points are relevant if you are sending output directly to PDF or XPS.

IF YOU SELECT THE OPTION TO CREATE A CHAPTER BREAK

- It determines where a new chapter will be created at this point in the output TOC. However, it will not necessarily create a new PDF or XPS file in the output for each chapter. If you want multiple files in the output, you must also select the "Generate multiple documents for native XPS/PDF output" option in the Advanced tab of the Target Editor. If you do not select the "Generate multiple documents for native XPS/PDF output" option, only one file will be created in the output (but it will contain chapter breaks).
- You will be able to use chapter autonumbering, even if you only have one PDF or XPS file as a result of the output.
- You will be able to insert footnotes in your topics that are consolidated and placed at the end of each chapter.

IF YOU DO NOT SELECT THIS OPTION FOR ANY OF YOUR TOC ENTRIES

- Only one PDF or XPS file will be created when you build your output. Even if you select the "Generate multiple documents for native XPS/PDF output" option in the Advanced tab of the Target Editor, only one PDF or XPS file will be created, because you must create chapter breaks in the Properties dialog to tell Flare where you want new documents to start.
- You will *not* be able to use chapter autonumbering (because no chapter breaks exist).

FRAMEMAKER OUTPUT

The following points are relevant if you are sending output to FrameMaker.

IF YOU SELECT THE OPTION TO CREATE A CHAPTER BREAK

- A new FrameMaker document will be created at this point in the output TOC, giving you multiple FrameMaker documents.
- You will be able to include a generated TOC in the FrameMaker output.
- You will be able to use chapter and volume autonumbering.
- You will be able to insert footnotes in your topics that are consolidated and placed at the end of each chapter.

IF YOU DO NOT SELECT THIS OPTION FOR ANY OF YOUR TOC ENTRIES

- Only one FrameMaker document will be created when you build your output.
- You will *not* be able to include a generated TOC in the FrameMaker output. You must have multiple FrameMaker documents in order to have a generated TOC.
- You will *not* be able to use chapter and volume autonumbering because FrameMaker requires multiple documents in order to take advantage of that feature.

WORD OUTPUT

The following points are relevant if you are sending output to Word.

IF YOU SELECT THE OPTION TO CREATE A CHAPTER BREAK

- It determines where a new chapter will be created at this point in the output TOC. However, it will not necessarily create a new Word file in the output for each chapter. If you want multiple Word documents in the output, you must also select the "Generate multiple documents for native XPS/PDF output" option in the Advanced tab of the Target Editor. If you do not select the "Generate multiple documents for native XPS/PDF output" option, only one Word document will be created in the output (but it will contain chapter breaks).
- You will *not* be able to include a generated TOC in the Word output (if you also select the"Generate multiple documents for native XPS/PDF output" option in the Target Editor). However, if you create a chapter break in the Properties dialog but do not select the"Generate multiple documents for native XPS/PDF output" option in the Target Editor, you will be able to include a generated TOC in the Word output. In other words, you must have only a single Word document in order to have a generated TOC. (This is the opposite of the FrameMaker situation, where multiple documents are necessary.)
- You will be able to use chapter autonumbering, even if you only have one Word document as a result of the output.
- You will be able to insert footnotes in your topics that are consolidated and placed at the end of each chapter.

IF YOU DO NOT SELECT THIS OPTION FOR ANY OF YOUR TOC ENTRIES

- Only one Word file will be created when you build your output. Even if you select the "Generate multiple documents for native XPS/PDF output" option in the Advanced tab of the Target Editor, only one Word file will be created, because you must create a chapter break in the Properties dialog to tell Flare where you want new documents to start.
- You will be able to include a generated TOC in the Word output (because only one Word document will be generated).
- You will *not* be able to use chapter autonumbering (because no chapter breaks exist).

EPUB OUTPUT

The following points are relevant if you are sending output to EPUB.

IF YOU SELECT THE OPTION TO CREATE A CHAPTER BREAK

- A new HTM file is created at each point where a chapter break occurs. This can be seen if you extract the EPUB file using another tool

IF YOU DO NOT SELECT THIS OPTION FOR ANY OF YOUR TOC ENTRIES

- The EPUB contains just one HTM file.

Note: Some aspects of this feature (e.g., page layouts) are used only in the print-based outputs. EPUB supports this feature only in the sense that it uses chapter breaks to determine how many HTM files are created as a result.

Note: There is an order of precedence with the three levels where you can specify a page layout. Specific entries in an outline TOC have the highest precedence, followed by page layouts at the target level, followed by page layouts at the project level. So if you've got a page layout set at the project or target level and it doesn't seem to be working the way you think it should, you might check to see if you have any page layouts set on specific TOC entries that are overriding the target- or project-level setting.

Note: When it comes to associating page layouts with entries in an outline TOC, it is important to understand the meaning of the word "chapter" in the Properties dialog. In that dialog, a "chapter" is simply the designation for a new portion of content that will use a particular page layout. It does not mean a chapter in the traditional sense of a manual. For example, if you have a title page, a TOC, 10 chapters, and an index in your manual, each one of those might be considered a separate chapter as far as the dialog is concerned, because you are creating a chapter break with a particular page layout specified at each of those locations in the outline TOC. Therefore, although you only have 10 chapters in the traditional meaning of the word, you might have 13 chapters as far as the dialog is concerned (one for the title page, one for the TOC, one for each traditional chapter, and one for the index).

Note: If you extract the EPUB file using another tool, you will find that it contains one or more HTM files. If you have used chapter breaks in the outline TOC, a new HTM file is created at each point where a chapter break occurs. If you do not use chapter breaks, the EPUB contains just one HTM file.

Specifying Section Breaks and Master Pages

This feature is supported in Adobe FrameMaker and Microsoft Word output.

In Flare, you can specify section breaks for print-based output. Doing this allows you to accomplish the following:

- **Add Section Breaks** You can add actual section breaks into Microsoft Word output. Section breaks are a feature unique to Word.
- **Autonumber Sections** You can take advantage of section autonumbering. See "Autonumbers" on page 252.
- **Start a New Section Using Master Pages** You can use a section break to apply a master page to Microsoft Word or FrameMaker output, starting at that location in the content. Master pages can be used to add header and footer content, insert page numbers, and specify the page size and orientation. The rest of this topic deals with using section breaks to apply master pages.

> **Note:** As an alternative to master pages, you can use page layouts for print-based output. Whereas master pages are used only for Word and FrameMaker outputs, page layouts can be used for all print-based outputs. See "Page Layouts" on page 336.

If you create one or more master pages for Word or FrameMaker output, you need to specify how those master pages will be used. You have a couple of options.

- You can use one or more master pages for specific sections of your print-based output (specify section breaks and master pages).

  OR

- You can use just one master page for every page of the output (associate a master page with a target).

HOW TO SPECIFY SECTION BREAKS AND MASTER PAGES FOR PRINT-BASED OUTPUT

If you are producing Microsoft Word or Adobe FrameMaker output, you can specify places in your outline TOC where you want to create section breaks for your print-based output. A primary reason for using a section break is to specify that a particular chunk of Word or FrameMaker output should use a certain print master page. The output uses the specified master page for the rest of the document, or until it comes across another section break/master page that you have included in the outline TOC.

E X A M P L E

Let's say you are producing a print-based document that includes a title page, a TOC, 15 chapters, and an index. If you want to include page numbering in the printed document, starting with the first chapter (i.e., no page numbers on the title page or TOC) and continuing to the end of the document, you can create a print master page for this purpose. You can specify in the print master page that the even numbers are placed at the bottom-left of those pages and the odd numbers are placed at the bottom-right of those pages. Then, in your outline TOC, you can create a section break where the first page of the first chapter occurs and associate the master page with that section.

Use these steps if you want to use this method:

1. Make sure the Project Organizer is open.
2. Double-click the **TOCs** folder.
3. Double-click the TOC that you plan to use for the print-based output. The TOC Editor opens to the right.
4. Select the entry in the TOC where you want to insert a section break, and where you want a print master page to start being displayed in the print-based output.
5. In the local toolbar, click . The Properties dialog for the TOC entry opens.
6. Click the **Printed Output** tab.
7. Click **Start a new section**.
8. Click the down arrow in the field **Configure section using this Master Page**, and select the print master page that you want to use.
9. Click **OK**.

10. Repeat steps 4-9 for each print master page that you want to associate with a particular section.

> **Tip:** If you want to apply the same settings to many TOC entries, you can hold down the CTRL or SHIFT key and select those entries. Then open the Properties dialog and specify the settings.

> **Note:** You do not have to follow these steps for every single TOC entry within that section—only for the first TOC entry in that section. The master page will be used in the print-based output starting at that location in the content and continuing to the end of the document, or until it comes across another section break/master page that you have designated.

11. Click to save your work.

HOW TO ASSOCIATE A MASTER PAGE WITH A PRINT TARGET

Use the following steps if you want to include only one master page in your Word or FrameMaker output, displaying that master page on every page of the output.

1. Open the Word or FrameMaker target that you are using to create the output.
2. Click the **Advanced** tab.
3. Click the drop-down arrow in the **Master Page** field, and select the print master page that you want to associate with the target.
4. Click to save your work.

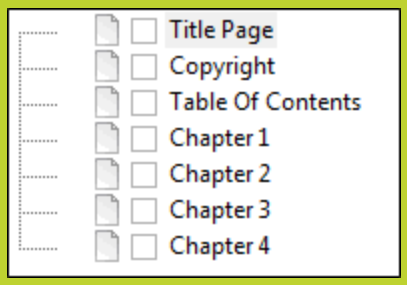
Autonumbering Flow for Output

If you have created autonumber formats that include volume, chapter, or section numbers (i.e., those using {chapnum}, {secnum}, and {volnum} commands), you need to specify how they will flow from one to another. You can determine whether to (a) start a particular volume, section, or chapter at a specific number; (b) use the same number as the previous instance; or (c) continue with the next number in the sequence. In addition, you can specify the type of number format (e.g., Roman, alpha, uppercase, lowercase, text) to use for volume, chapter, or section numbers.

The following steps are especially useful if you have created chapter autonumbers and need to ensure that they begin with the correct number at the correct location, after any front matter.

E X A M P L E

Let's say that the outline TOC that you have created to dictate the contents of your print-based output looks like this:



In order to specify different page layouts for different parts of the output, you might create a chapter break on "Title Page," another on "Table of Contents," another on "Chapter 1," another on "Chapter 2," another on "Chapter 3," and another on "Index."

What does this have to do with autonumbers? Well, let's say that you have created an autonumber format with the {chapnum} command (which is used for incrementing chapters), and you have applied this autonumber format on the first heading for the topics that start Chapters 1, 2, and 3. The problem is that you have already created chapter breaks on "Title Page" and "Table of Contents," which come before your "real" chapters. Therefore, unless you specify otherwise, Flare will consider "Chapter 1" to actually be the third chapter, and the autonumbers will reflect this.

So in order to ensure that the autonumber in "Chapter 1" actually starts with the number 1, you need to tell Flare to reset the autonumber to 1.

HOW TO SPECIFY AUTONUMBERING FLOW FOR OUTPUT

1. Make sure the Project Organizer is open.
2. Double-click the **TOCs** folder.
3. Double-click the TOC that you are using for the print-based output. The TOC Editor opens to the right.
4. Select the entry in the TOC for which you want to specify autonumber settings.

   For example, if a particular entry in the TOC is linked to a topic that contains an autonumber format with a {chapnum} or {volnum} command, you may want to specify the settings for that entry.

5. In the local toolbar, click . The Properties dialog for the TOC entry opens.
6. (Optional) Click the **Printed Output** tab.
   - **If You are Creating Chapters** In the **Break Type** field, select **Chapter Break** to specify that a chapter break should be created at this location. Next, use the **Page Layout** field to assign a page layout for the content starting at that point. Wherever a chapter break occurs in the output, chapter and volume autonumbers will be incremented. (For FrameMaker, this option will create a new document in the output. For the other outputs—PDF, XPS, XHTML, Word—this merely creates chapter breaks. If you want this to produce multiple PDF, XPS, or Word documents in the output, you also need to select the **Generate Multiple Documents for native XPS/PDF output** check box in the Advanced tab of the Target Editor.)
   - **If You are Creating Sections in Word or FrameMaker Output** Place a check mark in the **Start a new section** box if you want this location to start a new section break in the content. Wherever a section break occurs in the output, section autonumbers will be incremented. Another reason to select this option is to include a master page for that section of the document for either Microsoft Word or FrameMaker output. Master pages are not used for PDF, XPS, or XHTML output.
7. Click the **Auto-numbers** tab.
8. Complete the fields on the tab. Make sure you select the option in the appropriate area (**Chapter Number**, **Volume Number**, or **Section Number**).
   - **Reset to** Select this option if you want the section, chapter, or volume numbers in topics starting at this point in the TOC to begin at a specific number. Enter the number in the blank field. If you select the "text" option from the Format field, you can type any kind of text into this field. That text will be used instead of numbering.
   - **Format** Select the type of numbering to be used for the section, chapter, or volume autonumbers (e.g., decimal, Roman, uppercase, lowercase, text). If you select the "text" option, you can type any kind of text into the "Reset to" field. That text will be used instead of numbering.
   - **Same as previous** Select this option if you want the section, chapter, or volume numbers in topics starting at this point in the TOC to begin at the same number as the previous section, chapter, or volume.

» **Increment number** Select this option if you want the section, chapter, or volume numbers in topics starting at this point in the TOC to begin at the next number after the previous section, chapter, or volume.

Note: When setting the autonumber flow a TOC entry that you intend to be the start of a new volume, you should pay attention to the setting in the Chapter Number section, as well as the Volume Number section. For example, let's say you want the numbers in the output to go like this:

Vol 1

Ch 1

Ch 2

Ch 3

Vol 2

Ch 4

Ch 5

Suppose you select the TOC entry that you intend to be the start of Vol 2. You set the Volume Number to "Increment number" because you want it to follow Vol 1 in the numbering sequence. If the Chapter Number section above it is set to "Same as previous," you'll get the end result that you want. But if the Chapter Number section above is set to "Increment number," you may end up with something like this:

Vol 1

Ch 1

Ch 2

Ch 3

Vol 2

Ch 5

Ch 6

9. Click **OK**.
10. Click to save your work.

Associating a Master Table of Contents with a Project

The following steps show you how to associate a master TOC with a project.

HOW TO ASSOCIATE A MASTER TOC WITH A PROJECT

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Properties** section select **Project Properties**.
   - **Menu** Select **Project>Project Properties**.
   - **Project Toolbar** Click Project Properties...

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.

   The Project Properties dialog opens.
2. Select the **Defaults** tab.
3. Click in the **Master TOC** field, and from the drop-down, select the TOC.
4. Click **OK**.
5. Select **File>Save>Save All** (if using ribbons), select **File>Save All** (if using menus), or press **CTRL+SHIFT+S**.

Associating a Master Table of Contents with a Target

The following steps show you how to associate a master TOC with a target.

HOW TO ASSOCIATE A MASTER TOC WITH A TARGET

1. Open the target from the Project Organizer.
2. On the **General** tab in the Target Editor, click the drop-down arrow in the **Master TOC** field, and select the TOC that you want to associate with the target.
3. Click to save your work.

CHAPTER 8

Developing Outputs

In Flare you can determine what kind and how many types of output you want to provide for your end users. This can involve different tasks, depending on what you want to accomplish.

This chapter discusses the following:

Output Types 562
Targets 563
Primary Target 564
Condition Tags 565
Single-Sourcing 567
Which Topics Show Up in the Output? 568
Tasks Associated with Outputs 569
Determining the Output Type 571
Changing the Output Type for a Target 575
Adding Targets 576
Renaming Targets 578
Editing Target Settings 579

Output Types

There are several types of online output (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and several types of print-based output (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML) that you can produce in Flare. In addition, you can create EPUB output, which is used for ebooks. There is also an output type that lets you generate DITA code from your project (DITA code can be used to create either online or print-based output). Each output type has its own set of advantages.

There is a fine line between what is called "online output" and what is called "print-based" output. The truth is that topics in virtually any of Flare's online output types can be sent to a printer, and therefore considered print-based. Similarly, any of the print-based output types can be viewed electronically, and therefore considered online. The real distinction between online and print-based outputs has to do with their primary purpose. Online outputs are usually intended to be viewed on a screen, rather than on a printed page. The idea is to show only small pieces of content at a time and allow users to jump around to other topics or elements of the output. On the other hand, print-based output follows a more traditional format that you would find in an actual book or manual—with the pieces of the output following one after the other on pages until the end of the book (e.g., title page, table of contents, preface, chapters, index, appendixes—with page numbers, as well as header or footer content, shown along the way). Then there is EPUB output, which is intended to be viewed on a screen, but follows a structure closer to print-based outputs.

Targets

It is easy to confuse output types with targets, but they are two different concepts. A target is one instance of an output type. When you build your final output, you are essentially building one or more of the targets in your project.

When you create a new project using one of Flare's factory templates, one or more new targets are added to your project.

However, any targets added to the project are just a starting point for you. You can rename them to reflect the nature of your project. For example, if you are writing a Help system for a software program called FictionSoftPro, you could rename a target "FictionSoftPro." Also, just because only one target was added when you first created the project, this does not mean that you are limited to just that target in your project. You can add as many new targets as you need, using any of the available formats. You can also make as many copies of an existing target as you want. Each target has properties that you adjust to change the way the target behaves, as well as the way it looks and feels.

Primary Target

You can have as many targets in your project as you want, and any of your targets can be built (generated) whenever you like. However, chances are that you will have one target that you work with more than the others. You can set it as your primary target.

A primary target is treated just like any of your other targets, with one exception. There are certain shortcuts in Flare that let you build, view, or publish your primary target more quickly.

Also, when you open topics in the XML Editor, they will be displayed by default with the styles and other specifications associated with the primary target. However, you can use the Layout and Medium drop-downs in the local toolbar of the XML Editor to view topics with other settings. See "About Layout Modes" on page 22.

Condition Tags

Condition tags are markers that you can apply to different files or areas of your content so that some sections show up in some of your outputs but not in others.

E X A M P L E

Let's say you have two different audiences—beginners and advanced users. The content in your project is the same in most places for both audiences. However, there are sections that apply only to the beginners, and other sections that apply only to the advanced users. You can use one condition tag to mark the sections for the beginners only, and you can use another condition tag to mark the sections for advanced users only. This lets you create one output for the beginners and another output for the advanced users without having to create two separate projects.

You can apply condition tags to many different elements in your project, including the following.

AREAS OF CONTENT

- Bookmarks
- Images
- Index keyword markers
- Paragraphs in topics
- Snippets
- Table rows and columns in topics
- Text within paragraphs
- TOC books and entries
- Variables

CONTENT FILES

- Image files
- Master page files
- Multimedia files
- Page layout files
- Stylesheet files
- Topic files

PROJECT FILES

- Alias files
- Auto-index phrase set files
- Browse sequence files
- Condition tag set files
- Destination files
- Export files
- File tag set files
- Glossary files
- Header files
- Import files
- Index link set files
- Relationship table files
- Report files
- Search filter set files
- Skin files
- Synonym files
- Target files
- Table of contents files
- Variable set files

Single-Sourcing

"Single-sourcing" is a fancy term that means something very simple—to produce multiple results from one source. In Flare, you can make use of single-sourcing in many different ways.

One way to single-source content is to take advantage of multiple output formats and condition tags. How does it work? Each target in your project is a potential output (using a specific output format, such as PDF or XPS). You can create and apply condition tags to content. Then you associate the condition tags to your different targets as necessary, so that some content appears in some targets but not in other targets. This way, you do not need to create a separate project for each output that you want to produce. If most of the content for your outputs is similar, there is no need to rewrite it in another project. Simply specify which sections to include or exclude in which targets through the use of condition tags. This is one reason that topic-based authoring is so appealing. By placing condition tags on individual topic files themselves, you can pick and choose which topics to include in some outputs and which to include in other outputs.

You can also single-source images. If you have MadCap Capture installed and use it to create images for your project, you can provide one group of settings for online outputs and another group of setting for print-based outputs. You can do this from just one image, and you do not need to use condition tags for it.

For more information, including other methods for single-sourcing content, see the online Help.

Which Topics Show Up in the Output?

Suppose you have hundreds of topics, and you want some to show up in some outputs, but not in others? How do you control which topics are included in a given output? It depends on whether you are generating online or print-based output.

Online Output

If you are creating online output, all of the topics in the project will be included in the output unless you use one of the following methods to include or exclude them—(1) applying condition tags at the file level or (2) excluding links from the target. If you do not use one of these methods, every topic will be in the output, even if you add only some of them to the TOC (e.g., readers will be able to locate topics not in the TOC by using the search feature).

- **Applying Condition Tags at the File Level** You can place condition tags on the topic files and include or exclude them from the targets. This is an easy method, but you must make sure to apply the appropriate condition tags to each topic file, and then include/exclude those conditions in the correct targets.

  > **Note:** You can place condition tags on files in the Project Organizer as well, but these condition tags do not affect what files are included in the output. Rather, these condition tags are useful for importing files from one Flare project into another.

- **Excluding Links from Targets** Another method is to use an option on the Advanced tab in the Target Editor to exclude all content files unless they are directly or indirectly referenced from the target. This means that if the target is using particular files such as a table of contents (TOCs), master page, and so on, other files linked directly or indirectly from them will be part of the output. This is a much quicker method and helps to keep your output file size down, but it is not quite as flexible as the other method.

Print-based Output

If you are creating a print-based output, only the topics included in your "outline TOC" will be included in the output. In addition, you can place condition tags on outline TOC entries and use them to further separate content for different outputs (if you have targets using that same outline TOC).

Tasks Associated with Outputs

When developing outputs through the use of targets, there are many possible tasks that you might perform, depending on your situation. You may not need to perform all of the following tasks, just those that fit your needs. You also may not necessarily perform these tasks in the following order. For more information see the online Help.

- **Determine Output Type** The first task in developing output for your project is to determine which type of output is most appropriate for your needs. You might even need to produce multiple outputs and require more than one output type. There are several types of online output (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and several types of print-based output (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML) that you can produce in Flare. In addition, you can create EPUB output, which is used for ebooks. There is also an output type that lets you generate DITA code from your project (DITA code can be used to create either online or print-based output). Each output type has its own set of advantages. The output type can be specified on the General tab of the Target Editor. See "Determining the Output Type" on page 571 and "Changing the Output Type for a Target" on page 575.
- **Add or Make Copies of Targets** Every target in a project has particular output type assigned to it. You can add multiple targets to a project, and you can make as many copies of existing targets that you want. For example, your project might end up containing three targets that are all based on the PDF output type. See "Adding Targets" on page 576.
- **Rename Targets** It is helpful to rename targets that you use to reflect the nature of your project, especially if you are using multiple targets with the same output type. To rename a target, open the **Targets** folder in the Project Organizer, right-click the target you want to rename, and then select **Rename**. Then type a new name for the target and press **Enter**. See "Renaming Targets" on page 578.
- **Set Primary Target** You can select a primary target when you are in the process of creating a new project. Otherwise, you can open the **Targets** folder in the Project Organizer, right-click the target that you want to specify as the primary, and select **Make Primary**.
- **Create Condition Tags** If you are creating multiple outputs from the same project and you want the various outputs to contain different content, you can create condition tags. To create a condition tag, you can open the **Conditional Text** folder in the Project Organizer, double-click a condition tag set, and click the **New Item** button in the Condition Tag Set Editor. See "Creating Condition Tags" on page 327.
- **Apply Condition Tags** After you create condition tags, you can apply them to content. There are many ways to apply condition tags, depending on the element you are working on. In the Condition Tags dialog, you can select the condition tag(s) to be applied to that content. See "Applying Condition Tags for Printed Output" on page 329 and the online Help.
- **Associate Condition Tags With Targets** After creating and applying condition tags, you need to tell Flare what your target should do with the condition tags that you have created and applied. Should content with a particular condition tag be included in or excluded from that target? To associate condition tags with a target, open the **Targets** folder in the Project Organizer, and double-click the target that you want to open. Then in the Target Editor, select the **Conditional Text** tab and click the appropriate check boxes next to the condition tags that you

want to include in that target or exclude from it. See "Associating Condition Tags with Your Print Target" on page 333.

» **Edit Target Settings** Using the Target Editor, you can perform tasks such as changing the output type, setting the output file name, selecting a master stylesheet, improving the processing performance of the target, excluding content based on direct and indirect links from the target, and more. To edit target settings, open the **Targets** folder in the Project Organizer, double-click the target that you want to edit, and use the various tabs in the Target Editor to specify settings. See "Editing Target Settings" on page 579.

Determining the Output Type

One of the first tasks in developing output for your project is to determine which type of output is most appropriate for your needs. You might even need to produce multiple outputs and require more than one output type.

There is a fine line between what is called "online output" and what is called "print-based" output. The truth is that topics in virtually any of Flare's online output types can be sent to a printer, and therefore considered print-based. Similarly, any of the print-based output types can be viewed electronically, and therefore considered online. The real distinction between online and print-based outputs has to do with their primary purpose. Online outputs are usually intended to be viewed on a screen, rather than on a printed page. The idea is to show only small pieces of content at a time and allow users to jump around to other topics or elements of the output. On the other hand, print-based output follows a more traditional format that you would find in an actual book or manual—with the pieces of the output following one after the other on pages until the end of the book (e.g., title page, table of contents, preface, chapters, index, appendixes—with page numbers, as well as header or footer content, shown along the way). Then there is EPUB output, which is intended to be viewed on a screen, but follows a structure closer to print-based outputs.

PDF

Short for "Portable Document Format," PDF is an open standard format for electronic documentation exchange invented by Adobe. PDF files are used to represent a two-dimensional document in an device- and resolution-independent fixed-layout format. You can generate PDF output from your project directly, or you can generate a PDF while simultaneously building FrameMaker or Word output.

You can also set PDF options in the Target Editor. These options let you specify the way that images, document properties, the initial view, and security are handled in the output.

PDF output consists of a file with a **.pdf** extension that you can print or distribute to users.

XHTML

XHTML is a browser-based output type that consolidates project content into an XML file. It can be viewed online or printed.

XHTML is a good choice if you need an "intermediary" format for your large, custom, enterprise level proprietary systems. You can easily transform Flare-authored content into your own system. By creating the single file output, you can feed it into your own parser/transform and convert all of the Flare content to your internal formats. This is part of the flexibility that allows Flare to be integrated into just about any tool chain or work flow. If you do not have a situation like that, you may find one of the other formats to be a more suitable option for you.

XHTML consists of a collection of XHTML files that you can print or distribute to users. This includes the following.

- A file with an **.htm** extension. This is the XHTML file that contains the consolidated topic content from your project.
- A file with an **.mcbook** extension. This file is used to display the chapters in the MadCap Book Viewer.

- A Resources folder with **various ancillary files**, such as stylesheets and images.

If you want to make XHTML output accessible for others, you need to include all of the files in the output mentioned in this list. Otherwise, when they view the output, certain elements (e.g., images) might be missing from the pages.

XPS

Microsoft's XML Paper Specification (XPS) is a document format with a markup language that is a subset of XAML for Windows Presentation Foundation. XPS is an alternative to Adobe's Portable Document Format (PDF). You can generate XPS output from your project directly. Make sure you have the latest version of Microsoft .NET Framework installed on your computer. This is a free download from **microsoft.com**. Alternatively, you can generate XPS output while simultaneously building Word 2007 output (by installing a free add-in download from Microsoft).

XPS output consists of a collection of XPS files that you can print or distribute to users. This includes:

- A file with an **.xps** extension. This is the file that contains the consolidated topic content from your project. This is the main file and the only one that is essential. This is the file that you would provide to a printer or distribute to end users.
- A Resources folder with **various ancillary files**, such as stylesheets and images.

If you want users to download an XPS document from a server, you need to enable the server to do this by registering the MIME types and file extensions. For steps see the online Help.

Word

Word is an output type where the generated project is exported to Microsoft Word in one of the following formats: XML (default), DOC, DOCX, XPS, PDF. However, you can also create PDF or XPS output directly, without going through Word.

Note: For Word output, you can use master pages or page layouts to control the configuration of pages in the output. If you use page layouts (which are recommended), you can select an option in the Page Layout Editor that shows the real header, footer, and body areas if the page layout will be used in Microsoft Word output. See "Showing the Word Overlay in Page Layouts" on page 407.

Note: Unless you specify otherwise, the Word target will create files with an .xml extension only. If you want to use one of the other formats see the online Help.

Note: Flare supports Microsoft Word 2003 and newer versions.

Note: To create output in DOCX or XPS format, you need to have Microsoft Word 2007 installed. Also, Word 2007 allows you to create PDF files from Word without needing to have the Adobe Distiller installed.

FrameMaker

FrameMaker is an output type where the generated project is exported to Adobe FrameMaker in one of the following formats: BOOK, FM, PDF. However, you can also create PDF output directly, without going through FrameMaker.

Note: Flare supports FrameMaker 7.0 and newer versions.

Note: In addition to these formats, you can also generate EPUB output. EPUB is an online format for creating reflowable digital books (ebooks). This format is developed and maintained by the International Digital Publishing Forum (IDPF). For additional information about this group and the EPUB format, see http://idpf.org/. EPUB is sort of a hybrid format. The output is designed to be viewed electronically; in that way, it is like an online format. On the other hand, its structure is like a book or manual; in that way, it is like a print-based format. In fact, you can follow many of the same steps for creating PDF output to produce EPUB output.

Changing the Output Type for a Target

Each target in your project is based on one of the output types that is available in Flare (Adobe FrameMaker, Adobe PDF, DITA, DotNet Help, Eclipse Help, EPUB, Microsoft HTML Help, HTML5, Microsoft Word, Microsoft XPS, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus). If you want a particular target to use a different output type than is currently specified, use the following steps. You can also add an internal comment to describe the output.

HOW TO CHANGE THE OUTPUT TYPE FOR A TARGET

1. From the Project Organizer, open the target.
2. Click the **General** tab.
3. From the **Output Type** field make a selection.
4. In the message that opens click **Yes**.
5. (Optional) In the **Comment** field, you can enter an internal comment that describes the output you are generating from the target.
6. Click to save your work.

Note: For help in deciding which output type(s) you should use, see "Determining the Output Type" on page 571.

Adding Targets

You can add as many targets as you want to a project.

HOW TO ADD TARGETS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Target**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.
   - **Menu** Select **Project>Add Target**.
   - **Right-Click** In the Project Organizer, right-click on the **Targets** folder and from the context menu select **Add Target**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Target** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.
   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the 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 target.
6. From the **Output Type** field, select one of the available output formats. You can always change the output type later in the Target Editor.
7. Click **Add**. The target is added to the Targets folder in the Project Organizer. The Target Editor opens to the right.

HOW TO MAKE COPIES OF TARGETS

1. Make sure the Project Organizer is open.
2. Double-click the **Targets** folder. The available targets are shown.
3. Click on the target that you want to copy.
4. Press **CTRL+C** on your keyboard.
5. Press **CTRL+V** on your keyboard. A copy of the target is added to the Targets folder. The new target is given the same name as the target you copied, with the words "Copy of" before it.

Renaming Targets

It is usually helpful to rename the targets that you use to reflect the nature of your project (especially if you are using multiple targets with the same output type).

E X A M P L E

If you are producing a manual for a software application called FictionSoftPro, you might want to rename the target "FictionSoftPro." If you are creating a beginner's version and an advanced version of your manual, you might want to name one target "Beginner FictionSoftPro" and the other target "Advanced FictionSoftPro." That would be much easier than trying to distinguish between targets called "MyPDF" and "Copy of MyPDF."

HOW TO RENAME A TARGET

1. Make sure the Project Organizer is open.
2. Double-click the **Targets** folder. The available targets are shown.
3. Click on the target that you want to rename.
4. Press **F2**. The name in the target is highlighted.
5. Type a new name for the target and press **Enter** on your keyboard. The target is renamed.

Editing Target Settings

Using the Target Editor, you can edit properties for any of your targets.

HOW TO EDIT A TARGET

1. From the Targets folder in the Project Organizer, open the target that you want to edit.
2. You can use the tabs in the Target Editor to perform various tasks, depending on the output type associated with the target (i.e., some tasks can be performed only in certain targets). For additional tasks not described here (such as those for online output), see the online Help.
   - **Build (Generate) Output** You can use the Target Editor to build a target in your project that is not designated as your primary target. See "Building a Single Target" on page 622.
   - **Condition Tags (Associate)** After you create and apply condition tags to content, you need to tell Flare what your target should do with the condition tags that you have created and applied. Should content with a particular condition tag be included in or excluded from that target? See "Associating Condition Tags with Your Print Target" on page 333.
   - **Empty Pages—(Inject)** For PDF and XPS outputs, this check box is used in conjunction with empty page types to automatically include empty pages in the output when necessary. See "Using Empty Pages" on page 375.
   - **Glossaries (Associate)** If you are including one or more glossaries in your output, you need to associate them with the target. After you build the target, the glossary will be incorporated into the output. See "Associating Glossaries with Targets" on page 89.
   - **Glossaries (Auto-generate)** You can select an option to let Flare auto-generate a glossary for you in print-based output. See "Auto-generating Glossaries for Print" on page 71.
   - **Images—Microsoft Word Output (Embed)** An option on the Advanced tab of the Target Editor lets you ensure that images are embedded in Microsoft Word output. This option is enabled by default. For more information see the online Help.
   - **Images—Resized Scaled Images (Generate)** When you use Flare's resizing features to scale images, you can specify whether you want Flare to pre-compile the resized images. You can do this for the online outputs (DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus), as well as for Microsoft Word and Adobe FrameMaker output. What does this mean? It means that Flare will create new copies of images wherever you have specified resizing, rather than relying on the browser to render the new size from the original. This means better quality images, but it also means more image files in the output. It is recommended that you leave the default pre-compile setting as it is (enabled). However, if you want to disable it, you can open the Target Editor, select the **Advanced** tab, and select **Generate resized copies of scaled images** to remove the check mark. (For Adobe PDF, Microsoft XPS, and XHTML output, the resized images will always be pre-compiled, whether this option is enabled or not.)

- **Importing—Auto-sync (Disable)** Let's say you have imported Microsoft Word, Adobe FrameMaker, or Flare files from another project, and when doing so, you selected the "Easy Sync" option to automatically re-import the files when you generate output. You can use this feature to override that Easy Sync setting for a specific target. Therefore, if you want to re-import any of the files, you will need to do so manually. You might decide to use this option, for example, if you are testing the generation of output and do not want to wait the extra time for the files to be imported. After you finish your testing, you can deselect this option to return to the automatic imports of the files. For more information see the online Help.
- **Index (Auto-generate)** You can select an option to let Flare auto-generate an index for you in print-based output. See "Auto-generating Indexes for Print" on page 129.
- **Output File and Folder (Specify)** When you build the output for a target in your project, Flare sends the output files to the Output folder where your project is located. It also uses a default name for the main entry file in the default output type. However, you can specify a different location and main entry file name for a target's output files. For Word and FrameMaker output, you can also specify a different output file type than the default (e.g., add .pdf to the end of the file name, instead of .xml). For more information see the online Help.
- **Output Type (Change)** Each target in your project is based on one of the output types available in Flare (Adobe FrameMaker, Adobe PDF, DITA, DotNet Help, Eclipse Help, EPUB, Microsoft HTML Help, HTML5, Microsoft Word, Microsoft XPS, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus). You can use the Target Editor to switch the output type for a particular target. You can also add an internal comment to describe the output. See "Changing the Output Type for a Target" on page 575.
- **Page Layout—Master (Associate)** After you create a page layout and configure its frames and settings as necessary, you need to associate the page layout with the appropriate content. In most cases, you will probably want to associate different page layouts with various entries in your outline TOC (so that different page layouts can be used for different parts or chapters in a manual). Otherwise, you would associate a single "master" page layout with an entire target or project; in that case, the same page layout will be applied to all topics in that target or project. You can associate a page layout with an outline TOC entry with or without creating a chapter break at the same time. In the Target Editor, you can associate a master page layout with a target. See "Associating Master Page Layouts with Targets" on page 494.
- **PDF Output—Multiple Documents (Create)** If you are generating PDF output directly (rather than going through FrameMaker or Microsoft Word to produce it), you can split the generated output into multiple documents, rather than using the default, which results in only one document. To create multiple PDF documents, you must also specify chapter breaks at the appropriate places in the TOC (not the TOC that displays in the PDF output, but in the "outline TOC" used to determine the printed manual content and structure). This can be done on the Printed Output tab of the TOC Properties dialog. By specifying chapter breaks, you are letting Flare know where you want to split the output into new PDF documents. Then in the Advanced tab of the Target Editor, select the "Generate multiple documents for native XPS/PDF output" option.

- **PDF Output—Options (Specify)** If you are sending output directly to Adobe PDF, you can access PDF options in the Target Editor. These options let you specify the way that images, document properties, PDF tagging, and the initial view are handled in the output. See "Specifying PDF Options" on page 586.
- **PDF Output (Specify)** If you are building either Microsoft Word or Adobe FrameMaker targets, you can send the output to Adobe's Portable Document Format (PDF) as well. When you use this feature, Flare generates the native Word or FrameMaker documents, in addition to a PDF file. See "Specifying PDF Output Via Word or FrameMaker" on page 584.
- **PDF Output—Top Margins (Collapse)** You can collapse the top margin for all elements occurring at the top of a new page or column. See "Collapsing Top Margins" on page 601.
- **Printed Output—Online Features (Convert)** Some online features in your project are automatically handled in one way or another when you produce printed output. However, there are some features (expanding text and popup effects) where you can specify how you would like them to be treated in the printed output. See "Specifying How Online Features are Converted in Printed Output" on page 599.
- **Publish Output** After you build a target, you can publish the output to any destinations that you have created. See "Publishing Output to Destinations" on page 647.
- **Publishing Destinations (Associate)** A publishing destination is used to tell Flare where to send a copy of your output files. After you create a publishing destination, you need to associate it with a target that you plan to build. You can associate the same publishing destination with as many targets as you want. See "Associating Publishing Destinations with Targets" on page 646.
- **Pulse (Enable)** To integrate Pulse with your Flare output, you need to enable the Pulse functionality in a Flare target. You also need to create or select a community for the target. A community is simply the entity for a collection of Pulse data. You can perform these tasks on the Community tab in the Target Editor.
- **Redacted Text (Set)** For each output (i.e., PDF or XPS document) that needs to include redacted content, you can open the target. Then you can use the Advanced tab to specify how the content marked as "redacted" should be treated in the output. See "Setting Redacted Text on Targets" on page 604.
- **Relationship Tables (Associate)** If you have created relationship tables in your project, you need to tell Flare which tables to use for which targets. For more information see the online Help.
- **Source Control (Get Files Automatically)** If you have bound your project to a source control program, you can use a setting in the Target Editor to automatically get the latest version of all files prior to generating the target. You might use this option if you are working with a team of authors and want to make sure that you include the latest changes from other writers in the output (without having to manually get those files). For more information see the online Help.
- **Stylesheet—Master (Associate)** When you want to use styles in your content, the stylesheet needs to be made available for the content in question. In Flare, you can associate regular stylesheets with a single topic. However, you also have the option of using a regular stylesheet as a "master," applying it at either the project or target level, or both. In the Target Editor, you can associate a master stylesheet with a target. For more information see the online Help.

- **Stylesheet—Medium (Associate)** A medium is an alternative set of styles in a stylesheet that you use for different outputs. They are intended to be an exception to the default style you want to use. You can use the Target Editor to associate a medium with a particular target. A common use for a medium is to have one group of style settings for online formats (e.g., DotNet Help, Eclipse Help, Microsoft HTML Help, HTML5, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus) and a different group of settings for print formats (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML). Therefore, you could use the default medium for the online formats and use a "print medium" for the print-based targets. See "Associating a Medium with a Target" on page 250.
- **TOC—Master (Associate)** In most situations, you will have one TOC that you use for a particular output (target). In that case, you simply associate the appropriate TOC with the target. If you have multiple TOCs that you want to include in the same project or output target, the TOC that you associate with the project or target serves as the "master" TOC. In your master TOC, you have the option of creating links to the other TOC that you want to include in the output. If you do not select a TOC, Flare will use the first one in the project (if there is more than one). If you have specified a master TOC at the project level and another at a target level, the TOC at the target will take precedence. See "Associating a Master Table of Contents with a Target" on page 560.
- **TOC—Print-based Output (Auto-generate)** You can select an option to let Flare auto-generate a TOC for you in print-based output. See "Tables of Contents" on page 185.
- **TOC—Print-based Output (Heading Levels, Unlinked Books, Remove Images)** There are a few settings in the Target Editor that let you control how a generated TOC is produced in print-based output.
  - **Heading Levels** You can select an option to base the heading levels of your generated TOC on the structure of the outline TOC. When you generate print -based output (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML) with a topic containing a TOC proxy, a TOC is generated and included in the output. Unless you specify otherwise, the levels of the headings in the generated TOC are based on the <h1> through <h6> styles in your project (or other styles where you've entered a value for the mc-heading-level property). However, this option allows you to use an alternative method, basing the generated TOC on the exact structure that you create in the "outline TOC." See "Determining Heading Levels for a Print TOC" on page 203.
  - **Unlinked Books** You can select an option to create headings in a generated TOC for books that are not linked in your outline TOC. See "Creating Headings for Unlinked Books in a Generated TOC" on page 605.
  - **Remove Images** You can select an option to remove images from a generated TOC if you have inserted them into the headings in your topics. See "Removing Images from Headings in a Generated TOC" on page 608.
- **Variables (Override)** The variables that you create and define in the Variable Set Editor are available to your entire project. However, if you want the definition for a variable to be different in a particular target,

you can override the project-level definition for that target in the Target Editor. For more information see the online Help.

- **View Output** After you generate a target, you can view the output for it. See "Viewing Output" on page 632.
- **Word Output—Mirror Margins (Enable)** Let's say you create a page layout with mirror margins on pages (e.g., the odd pages are set up to have a left margin of 2 inches and a right margin of 1 inch, whereas the even pages are set up to have a left margin of 1 inch and a right margin of 2 inches). In such a case, Microsoft Word is unable to display the correct margins without a little help. Therefore, you need to enable mirror margins by selecting a single check box in the Target Editor. When you generate Word output, you will then see the appropriate margins on each page. See "Enabling Mirror Margins in Word Output" on page 609.
- **Word Output—Multiple Documents (Create)** If you are generating Word output, you can split the generated output into multiple documents, rather than using the default, which results in only one document. To create multiple Word documents, you must also specify chapter breaks at the appropriate places in the TOC (not the TOC that displays in the Word output, but in the outline TOC used to determine the printed manual content and structure). This can be done on the Printed Output tab of the TOC Properties dialog. By specifying chapter breaks, you are letting Flare know where you want to split the output into new Word documents.
- **XPS Output—Multiple Documents (Create)** If you are generating XPS output directly (rather than going through Microsoft Word to produce it), you can split the generated output into multiple documents, rather than using the default, which results in only one document. To create multiple XPS documents, you must also specify chapter breaks at the appropriate places in the TOC (not the TOC that displays in the XPS output, but in the "outline TOC" used to determine the printed manual content and structure). This can be done on the Printed Output tab of the TOC Properties dialog. By specifying chapter breaks, you are letting Flare know where you want to split the output into new XPS documents.
- **XPS Output (Specify)** Microsoft's XML Paper Specification (XPS) is a document format with a markup language that is a subset of XAML for Windows Presentation Foundation. XPS is an alternative to Adobe's Portable Document Format (PDF). By installing a free add-in download from Microsoft, you can generate output via Microsoft Word to the XPS format. See "Specifying XPS Output Via Microsoft Word" on page 597.
- **XPS Output—Top Margins (Collapse)** You can collapse the top margin for all elements occurring at the top of a new page or column. See "Collapsing Top Margins" on page 601.

3. After you have edited settings in the editor, select **File>Save**.

Specifying PDF Output Via Word or FrameMaker

If you are building either Microsoft Word or Adobe FrameMaker targets, you can send the output to Adobe's Portable Document Format (PDF). When you use this feature, Flare generates both the native Word or FrameMaker documents, in addition to a PDF file.

Creating a PDF via Microsoft Word

In order to send output to PDF via Microsoft Word, you need to have the following setup:

- You must have Microsoft Word 2007 installed. Previous versions of Word do not support this functionality.
- You must download and install the following free add-in from Microsoft:

  http://www.microsoft.com/downloads/details.aspx?familyid=4D951911-3E7E-4AE6-B059-A2E79ED87041&displaylang=en

> **Note:** With Word 2007 and this add-in from Microsoft, there is no need to have the Adobe Distiller installed.

HOW TO SPECIFY PDF OUTPUT VIA MICROSOFT WORD

1. Open the Word target.
2. In the Target Editor, do one of the following:

   USE THE OUTPUT FILE FIELD ON THE GENERAL TAB

   a. Select the **General** tab.

   b. In the **Output File** field, enter the name that you want to use for the main output file and add the .pdf extension at the end of it. For example, if you want your main output file to be called "MyNewManual," you would enter the following in this field: `MyNewManual.pdf`

   USE THE CHECK BOX ON THE ADVANCED TAB

   a. Select the **Advanced** tab.

   b. Click the check box next to **Generate PDF for MS Word Output**.

> **Note:** If you use this second check box option, it will overrule any file extension specified for the output file name on the General tab.

3. Click to save your work.

Creating a PDF via Adobe FrameMaker

In order to send output to PDF via Adobe FrameMaker, you need to have the Adobe Distiller installed.

HOW TO SPECIFY PDF OUTPUT VIA ADOBE FRAMEMAKER

1. Open the FrameMaker target.
2. In the Target Editor, do one of the following:

   USE THE OUTPUT FILE FIELD ON THE GENERAL TAB

   a. Select the **General** tab.

   b. In the **Output File** field, enter the name that you want to use for the main output file and add the .pdf extension at the end of it. For example, if you want your main output file to be called "MyNewManual," you would enter the following in this field: `MyNewManual.pdf`

   USE THE CHECK BOX ON THE ADVANCED TAB

   a. Select the **Advanced** tab.

   b. Click the check box next to **Generate PDF for FrameMaker Output**.

   > **Note:** If you use this second check box option, it will overrule any file extension specified for the output file name on the General tab.

3. Click to save your work.

> **Note:** You can also create PDF output directly, without going through Word or FrameMaker.

Specifying PDF Options

If you are sending output to Adobe PDF, you can access PDF options in the Target Editor. These options let you specify the way that images, document properties, PDF tagging, the initial view, and security are handled in the output.

HOW TO SPECIFY PDF OPTIONS

1. Open a target that is using the PDF format. If necessary, you can change the output type for a target. See "Changing the Output Type for a Target" on page 575.
2. Select the **PDF Options** tab.
3. Complete the options on the tab as necessary.

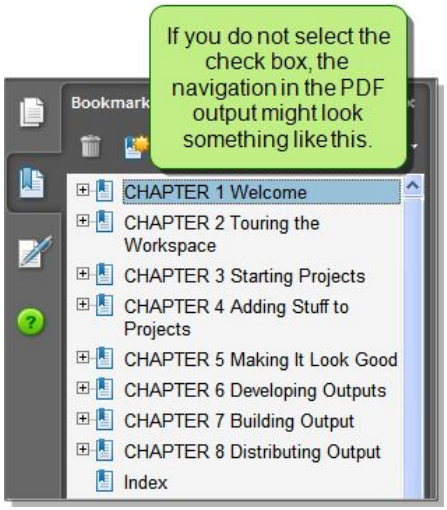
   IMAGE COMPRESSION

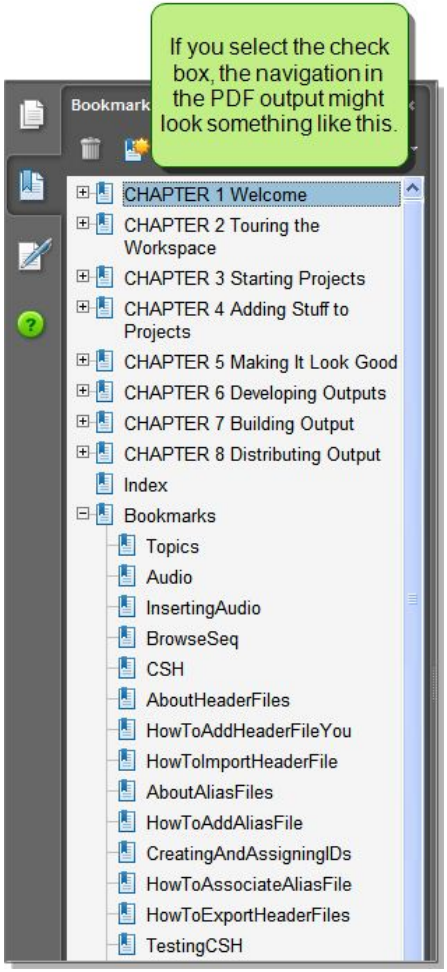
   - **Downsample images above** Select this if you want to downsample images and then enter the number of pixels per inch. Downsampling means to reduce the number of pixels in an image, which can significantly reduce the size of the PDF.
   - **Compression** Select an option for the compression.
     - **Automatic** This uses Flare's internal lossless compression algorithm on all images. Lossless compression allows you to reduce file size without sacrificing image quality. JPEGs remain as they are.
     - **JPEG** This converts all images to JPEG with some compression.
   - **Quality** If you select the "JPEG" option, you can also choose an option from this field. Maximum uses the least amount of compression and results in a higher file size.

   DOCUMENT PROPERTIES

   - **Title** Enter the title for the PDF document. This information is included in the final PDF output (e.g., shown in the file properties). The same is true for the Author, Subject, and Keywords fields.
   - **Author** Enter the name of the author.
   - **Subject** Enter the subject of the document.
   - **Keywords** Enter any keywords for the document.

» **Include non-TOC bookmarks in the bookmarks pane** If you have inserted bookmarks randomly in some of your topics, by default these will not appear as links in the output navigation pane. If you want these bookmarks to be shown in the navigation pane (under your table of contents links) you can click this check box.





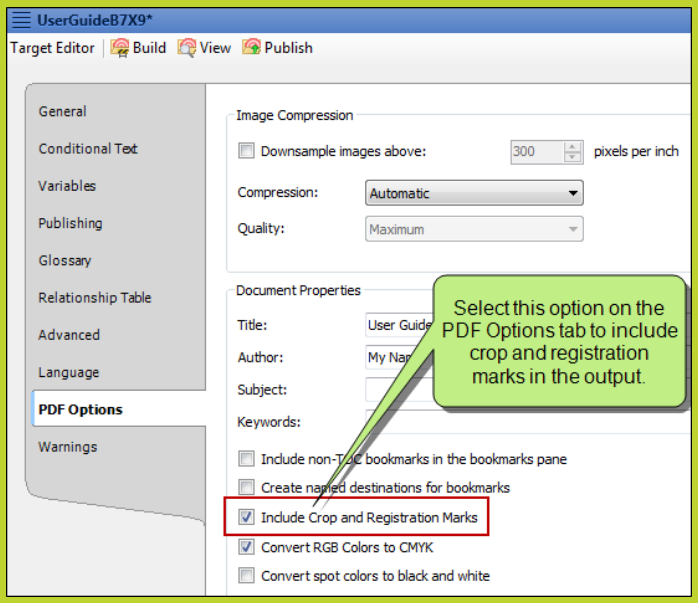
» **Create named destinations for bookmarks** Select this check box if you want to automatically create named destinations everywhere a bookmark exists. This lets you create links from a file to a specific location in a PDF. You can also insert named destinations manually.

» **Include Crop and Registration Marks** Select this check box if you want to include crop and registration marks in the output. These are elements that are often used when documents are sent to a professional printer.

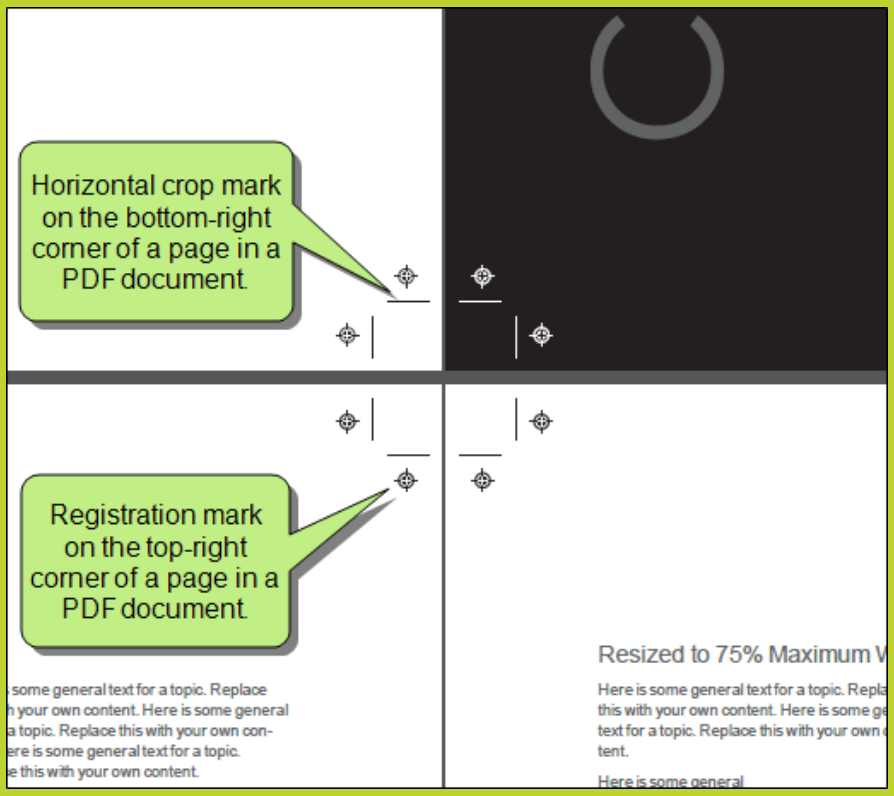
  » **Crop marks** These are thin vertical and horizontal lines that show the edges of the page, where it will be trimmed by the printer. The location of crop marks are determined by the page size you specify.

  » **Registration marks** These are small cross-hair target icons shown next to crop marks. Each color in the final output is printed on its own layer. Therefore, in order to make sure the colors are matched up accurately, printers use registration marks to align plates on the press.

EXAMPLE



Here is PDF output showing crop and registration marks.



- **Convert RGB Colors to CMYK** Select this check box if you have used only RGB colors in your content and want all of those occurrences to be converted to the CMYK model in the output. CYMK is an acronym for the four primary colors used in printing (Cyan, Magenta, Yellow, and Key—or black). Whereas CMYK is often the preferred model for print-based output, the RGB (Red, Green, Blue) model is primarily intended for electronic content.
- **Convert spot colors to black and white** Select this option to convert spot colors to black and white. Spot colors include things such as font color, background color, and so on (basically, everything except images). This is a quick way to produce a PDF that does not contain color. The alternative is to make sure that you do not have any color settings locally in topics, in your stylesheet (or medium), in page layouts, etc. For example, you might create some PDFs in full color, but you might need to send one to a professional printer to be processed in black and white. So for that target, you select the option to convert spot colors to black and white.

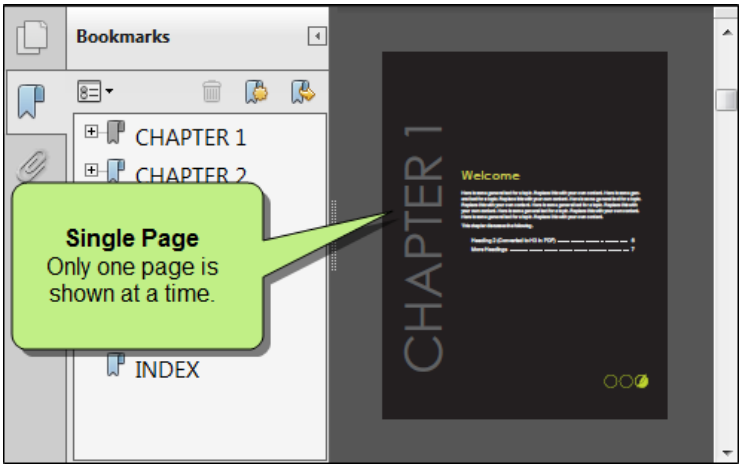
> **Note:** If you also need the PDF to show images in gray scale, you have a couple of options. First, you can insert one image in color and another in gray scale, then apply conditions to them. Second, you can create and insert just one image, but single-source it so that online outputs show it in color but print outputs show it in gray scale.

PDF TAGGING

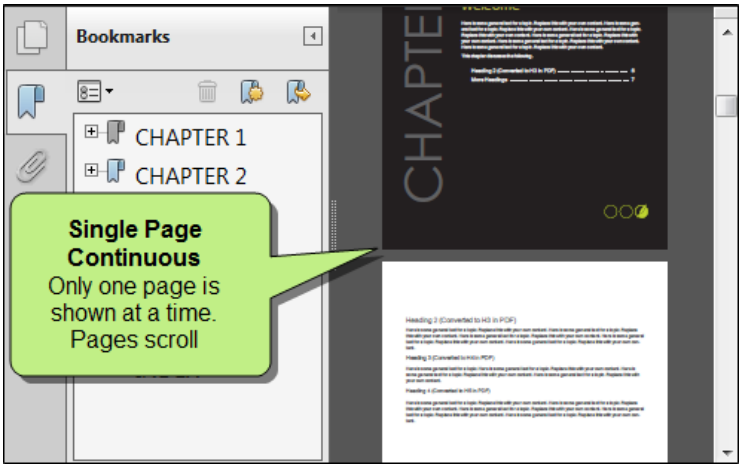
- **Generate tagged PDF** Select this to generate a tagged PDF. This gives the file a structure similar to that of the source XHTML documents. This structure is necessary for certain accessibility applications, including screen readers. For more information about viewing the tag structure in Adobe Acrobat Pro, please refer to the documentation provided with that application.

INITIAL VIEW

- **Magnification** Select the default size for displaying the PDF output when an end user opens it (e.g., actual size, fit page, fit width, a specific percentage).
- **Navigation** Select how you want the output to be displayed by default when it comes to navigation features (Page Only, Bookmarks Panel, and Page).
- **Page layout** You can select any of the following options to set the page layout that the reader initially sees when opening the PDF.
  - **(default) Single Page** This displays one page at a time, with no portion on other pages visible. When you slide the scroll bar, the current page does not scroll; instead, the next page appears quickly.

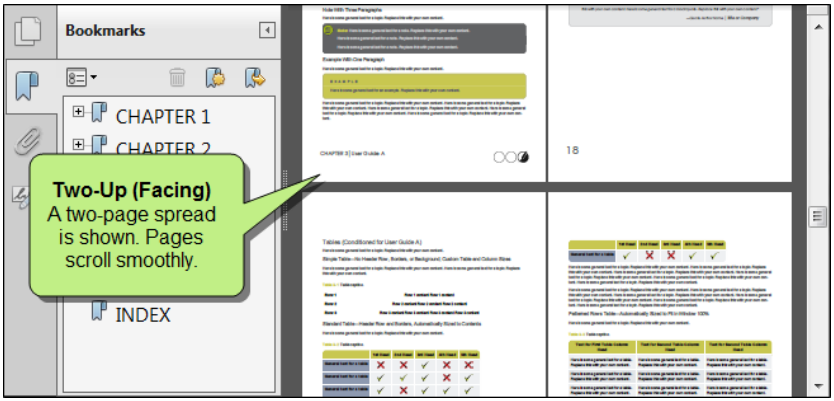


» **Single Page Continuous** This displays pages in a continuous vertical column that is one page wide. When you slide the scroll bar, the current page scrolls until the next page smoothly comes into view.

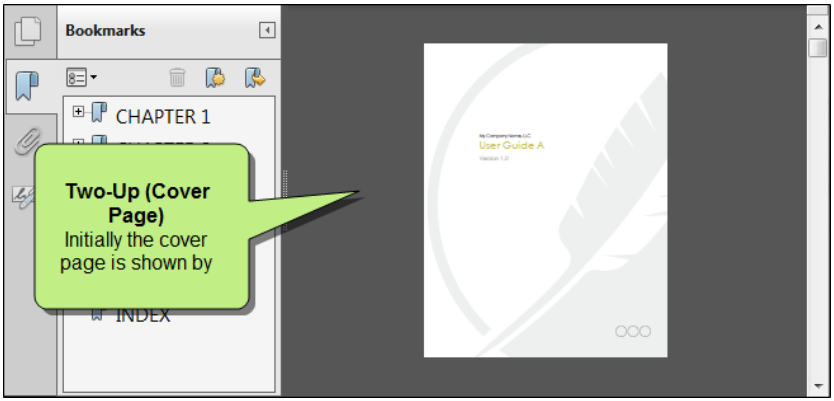


» **Two-Up (Facing)** This displays each two-page spread with no portion of other pages visible. When you slide the scroll bar, the current pages do not scroll; instead, the next pages appear quickly.

» **Two-Up Continuous (Facing)** This displays facing pages side by side in a continuous vertical column. When you slide the scroll bar, the current pages scroll until the next pages smoothly come into view.



» **Two-Up (Cover Page)** This displays the first page by itself. After that it displays each two-page spread with no portion of other pages visible. When you slide the scroll bar, the current pages do not scroll; instead, the next pages appear quickly.



- **Two-Up Continuous (Cover Page)** This displays the first page by itself. After that it displays each two-page spread with no portion of other pages visible. When you slide the scroll bar, the current pages scroll until the next pages smoothly come into view.

- **Title bar** You can select one of the following to determine the text shown in the title bar of the PDF output.
  - **File Name** This is the text specified in the Output File field on the General tab of the Target Editor.
  - **Document Title** This is the text specified in the Title field on the PDF Options tab of the Target Editor.
- **Collapsed bookmarks** Select this if you want the bookmark folders to be collapsed initially in the bookmark panel of the output.
- **Open in full screen mode** Select this if you want the output to be displayed initially in full screen mode, taking over the reader's entire screen.

SECURITY

- **Require password to open** Select this if you want users to be required to enter a password in order to open the document. Then type the password you want to use.

  Specify the amount of security for the document.

  - **40-bit** Not as secure, but can be viewed with Adobe Reader 3.0 and higher
  - **128-bit** More secure, but can be read only with Adobe Reader 5.0 and higher

» **Restrict permissions** Select this if you want to limit what readers of the document can do unless they have the permissions password. Then type the password you want to use. When you set only a permissions password (also known as a "master password"), recipients don't need a password to open the document. However, they must type the permissions password to set or change the restricted features. This option works with Adobe Acrobat Reader 9.0 and higher.

In the **Open Permissions** section, specify the actions that you want to restrict.

> **Note:** If the PDF is secured with both types of passwords, it can be opened with either password. However, only the permissions password allows the user to change the restricted features. Because of the added security, setting both types of passwords is often beneficial. All Adobe products enforce the restrictions set by the permissions password. However, if third-party products do not support or respect these settings, document recipients are able to bypass some or all of the restrictions you set.

4. Click to save your work.

> **Note:** File size results with these options may vary.

Specifying XPS Output Via Microsoft Word

Microsoft's XML Paper Specification (XPS) is a document format with a markup language that is a subset of XAML for Windows Presentation Foundation. XPS is an alternative to Adobe's Portable Document Format (PDF).

You can generate XPS output from your project directly. Make sure you have the latest version of Microsoft .NET Framework installed on your computer. This is a free download from **microsoft.com**.

Alternatively, you can generate XPS output while simultaneously building Word 2007 output (by installing a free add-in download from Microsoft).

The following describes how to use the second option, sending output to XPS via Microsoft Word. If you want to send output to XPS directly, simply install the latest version of Microsoft .NET Framework and build an XPS target.

Requirements

In order to send output to XPS via Microsoft Word, you need to have the following setup.

- You must have Microsoft Word 2007 installed. Previous versions of Word do not support this functionality.
- You must download and install the following free add-ins from Microsoft.
  - **To View and Generate XPS** Go to **http://www.microsoft.com/whdc/xps/viewxps.mspx**

    Note: This first add-in is not necessary for Microsoft Vista users.

  - **To Save as XPS** Go to **http://www.microsoft.com/downloads/details.aspx?familyid=4D951911-3E7E-4AE6-B059-A2E79ED87041&displaylang=en**

HOW TO SPECIFY XPS OUTPUT FOR MICROSOFT WORD

1. Open a Word target.
2. In the Target Editor, do one of the following.

   ##### *USE THE OUTPUT FILE FIELD ON THE GENERAL TAB*

   a. Select the **General** tab.

   b. In the **Output File** field, enter the name that you want to use for the main output file and add the .xps extension at the end of it. For example, if you want your main output file to be called "MyNewManual," you would enter the following in this field: `MyNewManual.xps`

   OR

   ##### *USE THE CHECK BOX ON THE ADVANCED TAB*

   a. Select the **Advanced** tab.

   b. Click the check box next to **Generate XPS for MS Word Ouput**.

   > **Note:** If you use this second check box option, it will overrule any file extension specified for the output file name on the General tab.

3. Click to save your work.

Specifying How Online Features are Converted in Printed Output

The online features from your project (e.g., text hyperlinks, expanding text, Help controls) are converted to print-based output in various ways, as described in the following table.

Online feature	How it is converted in print-based output
Breadcrumbs	Not included in the document
Browse sequences	Not included in the document
Context-sensitive Help	Not included in the document
Cross-references	You can convert the cross-references to page number references (e.g., "See My Topic" can become "See page 36"). This is done by using a stylesheet medium and changing the property settings for the cross-reference style for the print medium. You also need to make sure the print medium is associated with the target you wan to build.
Drop-down text	Hotspot converted to text; body expanded inline
Expanding text	Hotspot converted to text; body can be converted (in the Target Editor) to (1) footnotes, (2) inline text, or (3) removed. See steps below.
Favorites	Not included in the document
Glossary term links	Converted to footnotes at the bottom of pages
Help controls (related topics, concept links, keyword links)	Not included in the document
Popups	Hotspot converted to text; body can be converted (in the Target Editor) to (1) footnotes, (2) inline text, or (3) removed. See steps below.
Rules (horizontal lines)	Not included in the document
Scripts	Not included in the document

Online feature	How it is converted in print-based output
Search	Not included in the document
Text hyperlinks	Converted; for some outputs (e.g., Word), users can press CTRL key and click link to go to destination
Togglers	Hotspot converted to text; destination converted to inline text
Topic popups	Converted to text with link removed

HOW TO SPECIFY THE WAY ONLINE FEATURES ARE CONVERTED IN PRINTED OUTPUT

Some online features in your project are automatically handled in one way or another when you produce printed output. However, there are some features (expanding text and popup effects) where you can specify how you'd like them to be treated in the printed output.

1. Open the target that you plan to build for your printed output. The Target Editor opens.
2. Click the **Advanced** tab.
3. In the **Expanding Text Effects** and **Text Popup Effects** sections, select an option for each type of online feature:
   - **Convert to footnote** The body for the expanding text or popup effect is displayed as a footnote in the printed output.
   - **Expand text inline** The body for the expanding text or popup effect is displayed as a text (after the "hotspot" text) in the printed output.
   - **Remove the "body"** The body for the expanding text or popup effect is not included in the printed output.
4. Click to save your work.

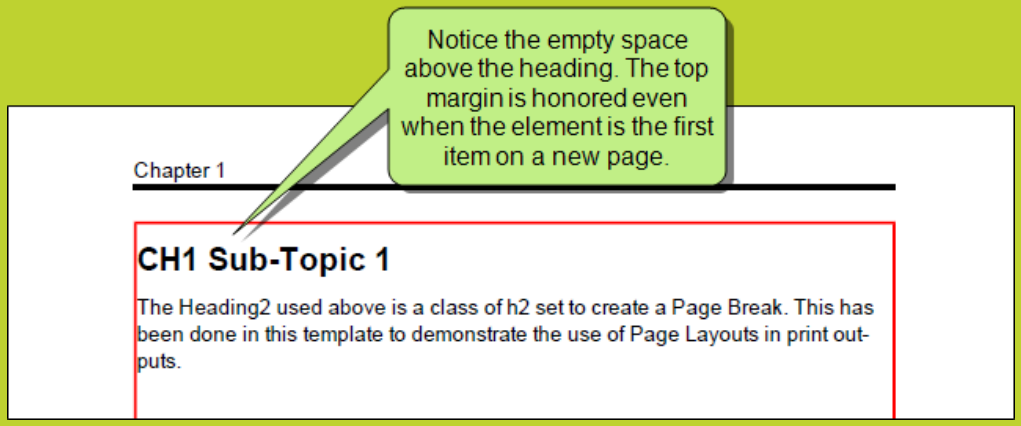
Collapsing Top Margins

This feature is supported in Adobe PDF and Microsoft XPS output.

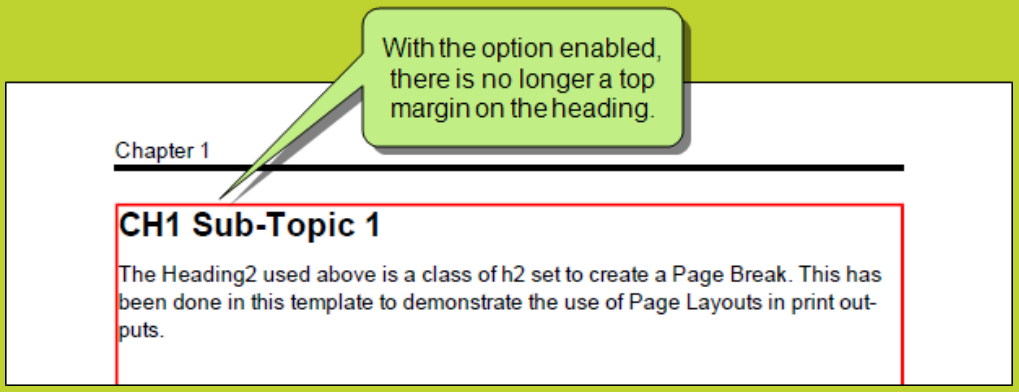
In PDF and XPS targets you can collapse the top margin for all elements occurring at the top of a new page or column.

E X A M P L E

Let's say you have top margins set on your headings. If the "collapse top margin" option is not enabled, the results are something like this (a red border has been added to the body frame so you can see the subtle difference):



If the option is enabled, the results are something like this:



HOW TO COLLAPSE TOP MARGINS

1. Open the target.
2. In the Target Editor, select the **Advanced** tab.
3. In the **Margins** section, select **Collapse top margin at top of page/column**.
4. Click to save your work.

Setting Redacted Text on Content

This feature is supported in Adobe PDF, Microsoft XPS, and XHTML output.

At each place in a document where you need to perform redaction, you can select the necessary content and apply the redaction via a style (recommended) or locally. Redaction occurs when content is permanently eliminated from a printed or electronic document. In place of that content, end users will see black rectangles that indicate where the original content was found.

HOW TO SET REDACTED TEXT ON CONTENT ON USING A STYLE

1. From the Content Explorer, open the stylesheet that you want to modify. By default, stylesheets are stored in the Resources\Stylesheets folder, but you can store them elsewhere if you like.
2. In the local toolbar, make sure the first button displays Simplified View (which means that the Advanced view is currently shown in the editor). If the button displays Advanced View instead, then click it.

   Note: For steps using the Simplified View, see the online Help.

3. In the upper-left corner of the editor, make sure the **Show Styles** field is set to Show All Styles.
4. Select a style (e.g., character, heading, paragraph).
5. From the **Show** drop-down list on the upper-right side of the editor, select Show: Alphabetical List.
6. Scroll down and find the property called **mc-redacted**.
7. Click in the cell to the right of that property and select **redacted**.
8. Click to save your work.
9. After editing a style, you can apply it to content in a topic or snippet.

   The text becomes shaded in the editor, letting you know that it will be redacted when the output is generated.

10. Click to save your work.

Setting Redacted Text on Targets

This feature is supported in Adobe PDF and Microsoft XPS output.

For each output (i.e., PDF or XPS document) that needs to include redacted content, you can open the target. Then you can use the Advanced tab to specify how the content marked as "redacted" should be treated in the output.

HOW TO SET REDACTED TEXT ON TARGETS

1. Open the appropriate PDF or XPS target.
2. In the Target Editor, select the **Advanced** tab.
3. In the **Redacted text** section, select one of the following.
   - **Black out** Displays black rectangles in places of content that has been redacted.
   - **Highlight** Displays content that has been redacted with a highlighted background.
   - **Display as normal text** Displays content that has been redacted in the same way that it displays other content.

   Why are there choices other than "black out"? Those options are available in case you need to generate another output that shows the redacted text.

   E X A M P L E

   Let's say you need to generate one PDF that blacks out the redacted text (e.g., the version being released to the public) and another PDF that shows the text rather than hiding it (e.g., the version being distributed to authorized individuals). In that case, you can open the target to be used for public release and set the redacted text option to "Black out." For the target to be used for authorized individuals, you can set the redacted text option to either "Highlight" or "Display as normal text."

4. Click to save your work.

Creating Headings for Unlinked Books in a Generated TOC

This feature is supported in EPUB and in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, XHTML).

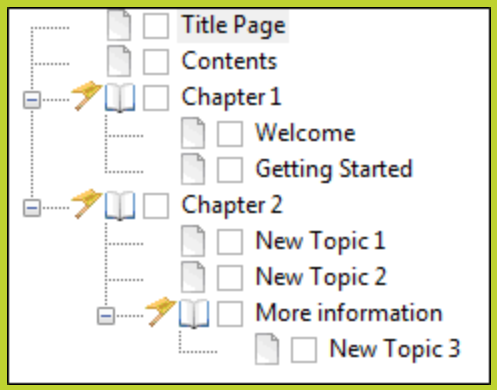
When creating print output, you can determine which topic headings will be displayed at which level in the generated TOC. For example, even though all of your topics may use a heading style of <h1>, you might want some of those topic headings to display at the first level in the print TOC (acting as an <h1>), others at the second level (acting as an <h2>), and still others at the third level (acting as an <h3>).

You can base the heading levels on the structure you create in the outline TOC. If a TOC entry is at the extreme left of the TOC Editor, it will display at the first level of the print TOC; if an entry is indented to the right one level, it will display at the second level; and so on. Not only will those headings be reflected in the generated TOC in the output, but the corresponding headings will be converted in the main body too (e.g., if a heading becomes an <h2> in the TOC, it will become an <h2> in the text as well). See "Determining Heading Levels for a Print TOC" on page 203.

If you create books in the outline TOC (whether they are linked to topics or not), they will affect the heading level in the print TOC. If you want unlinked books to be converted to headings in the output (both in the print TOC and in the main body), you can do so.

EXAMPLE

Let's say the first paragraph in each topic that you create uses the <h1> style (except your title page and print TOC topic), and you structure the outline TOC like this:



If you use the TOC depth feature, the print TOC will look like this in the output:

Welcome 2

Getting Started 3

NewTopic1 4

NewTopic2 5

NewTopic3 5

Notice that "NewTopic3" is indented to the third level in the print TOC (because that is its position in the outline TOC). The other topics are at the second level. The books ("Chapter 1" and "Chapter 2") are at the first level, but they are not linked to topics; therefore, they are not included in the output.

If you use the feature to include the unlinked books, the print TOC will look like this in the output:

Chapter 1 2

Welcome 2

Getting Started 3

Chapter 2 4

NewTopic1 4

NewTopic2 5

More Information 6

NewTopic3 6

HOW TO CREATE HEADINGS FOR UNLINKED BOOKS IN A GENERATED TOC

1. Open the target.
2. In the Target Editor, select the **Advanced** tab.
3. In the **Generated TOC** section, select **Inject headings for unlinked books in TOC**.
4. Click to save your work.

Removing Images from Headings in a Generated TOC

This feature is supported in all print outputs (Adobe FrameMaker, Adobe PDF, Microsoft Word, Microsoft XPS, and XHTML).

If you have inserted images into the headings in your topics, you can make sure those images do not appear in the generated TOC of the printed output.

This option works somewhat differently for Word output than it does for the other outputs.

WORD

- If the option is disabled, images appear in both content headings and the print TOC.
- If the option is enabled, images are removed from both content headings and the print TOC.

PDF, XHTML, XPS, FRAMEMAKER

- If the option is disabled, images appear in content headings only.
- If the option is enabled, images are removed completely.

HOW TO REMOVE IMAGES FROM HEADINGS IN A GENERATED TOC

1. Open the target.
2. In the Target Editor, select the **Advanced** tab.
3. In the **Generated TOC** section, select **Remove images from paragraphs with heading levels**.
4. Click to save your work.

Note: Keep in mind that, with this feature, the images are also removed from the heading in the content of the document. Therefore, if you want to have the images in the content, but not in the print TOC, you should not use this feature. Instead, you must remove the images from the print TOC manually after generation (if you compile an editable output, such as Word or FrameMaker).

Enabling Mirror Margins in Word Output

Let's say you create a page layout with mirror margins on pages (e.g., the odd pages are set up to have a left margin of 2 inches and a right margin of 1 inch, whereas the even pages are set up to have a left margin of 1 inch and a right margin of 2 inches). In such a case, Microsoft Word is unable to display the correct margins without a little help. Therefore, you need to enable mirror margins by selecting a single check box in the Target Editor. When you generate Word output, you will then see the appropriate margins on each page.

HOW TO ENABLE MIRROR MARGINS IN WORD OUTPUT

1. Open the target being used for Word output.
2. Select the **Advanced** tab.
3. Click the check box next to **Generate "Mirror Margins" for MS Word Output**.
4. Click to save your work.

Registering MIME Types and File Extensions for XPS Output

If you want users to download an XPS document from a server (e.g., from a website), you need to enable the server to do this by registering the MIME types and file extensions.

The following steps pertain to a server running Microsoft Internet Information Services (IIS). You should provide this information to the individual(s) responsible for software on your company's server. Exact steps may vary depending on the operating system.

HOW TO REGISTER A MIME TYPE AND FILE EXTENSIONS FOR XPS OUTPUT

1. Open the Control Panel. On many computers, you can do this by clicking **Start>Control Panel**.
2. Make sure that Microsoft IIS is installed on the server. If it is not, use the following steps.
   a. Double-click **Add or Remove Programs**. The Add or Remove Programs window opens.
   b. Click **Add/Remove Windows Components**. The Windows Components Wizard opens.
   c. Click the check box next to **Internet Information Services (IIS)** to add a check mark.
   d. Click **Next**.
   e. Click **Finish**.
3. In the Control Panel, double-click **Administrative Tools**. The Administrative Tools dialog opens.
4. Double-click **Internet Information Services**. The Internet Information Services dialog opens.
5. Expand the **IIS tree** until you find the Default Web Site folder. On some servers, you might define the MIME types at the machine node (local computer) in IIS, not the Default Web Site.
6. Right-click the **Default Web Site** folder.
7. Select **Properties**. The Default Web Site Properties dialog opens.
8. Select the **HTTP Headers** tab.
9. In the **MIME Map** section, click **File Types** or **MIME Types**.
10. Click **New Type** or **New**.
11. In the **Associated extension** or **Extension** field, type `.xps`.
12. In the **Content Type (MIME)** or **MIME Type** field, enter `application/vnd.ms-xpsdocument`.
13. Click **OK** until you exit from all open dialogs.

Note: For more information see this article: **http://msdn.microsoft.com/en-us/library/ms752346.aspx**.

Specifying EPUB Options

If you are sending output to EPUB, you can access EPUB options in the Target Editor. These options let you provide metadata, select a cover image, validate output, generate MOBI output, and enable MathML to PNG conversion.

HOW TO SPECIFY EPUB OPTIONS

1. Open a target that is using the EPUB format. If necessary, you can change the output type for a target. See "Changing the Output Type for a Target" on page 575.
2. Select the **EPUB Options** tab.
3. Complete the options as necessary.

   METADATA

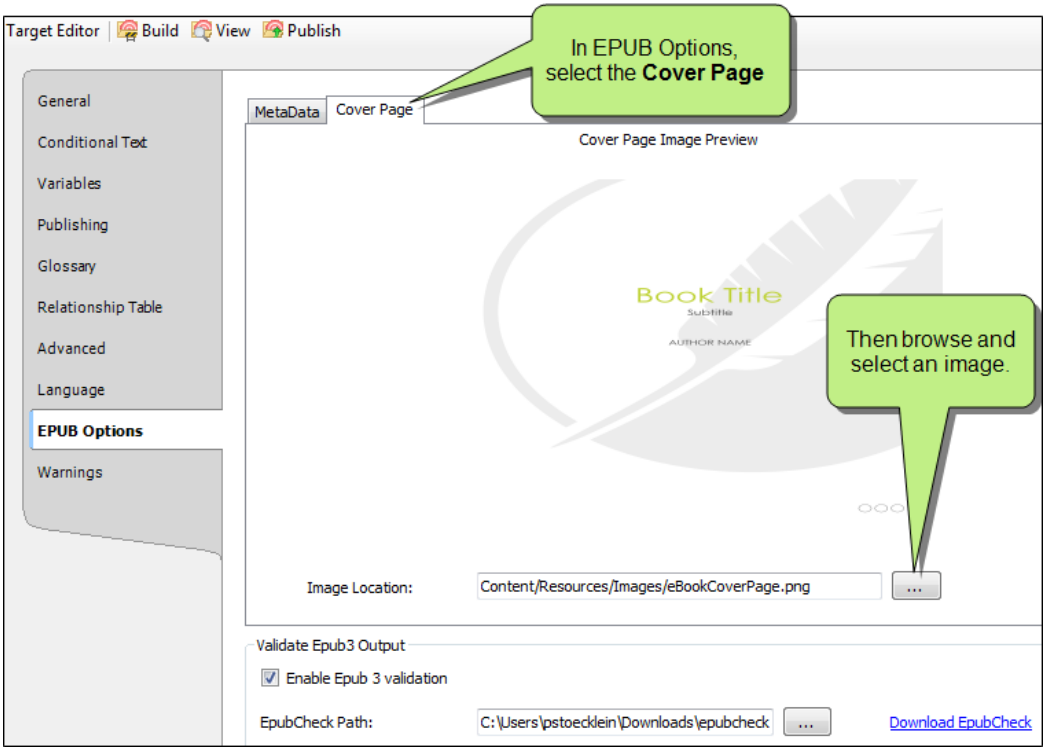
   Select the **MetaData** tab and complete any of the following. The information becomes embedded in the final output.

   - **Title** The document title you provide is usually displayed at the top of the EPUB reader. If you do not provide a title, the target name is automatically used instead.
   - **Author**
   - **Publisher(s)**
   - **Tag** This is a custom field that you can use for your own purposes.
   - **Rights**
   - **Description**
   - **ISBN**
   - **Publish Date**
   - **Identifier**

   For more information about EPUB metadata and the fields supported in Flare (except "Tag"), see this link: **http://idpf.org/epub/20/spec/OPF_2.0.1_draft.htm#Section2.2**.

COVER IMAGE

Select the **Cover Page** tab and click ... to find and select an image file. This is used as the cover for your ebook.



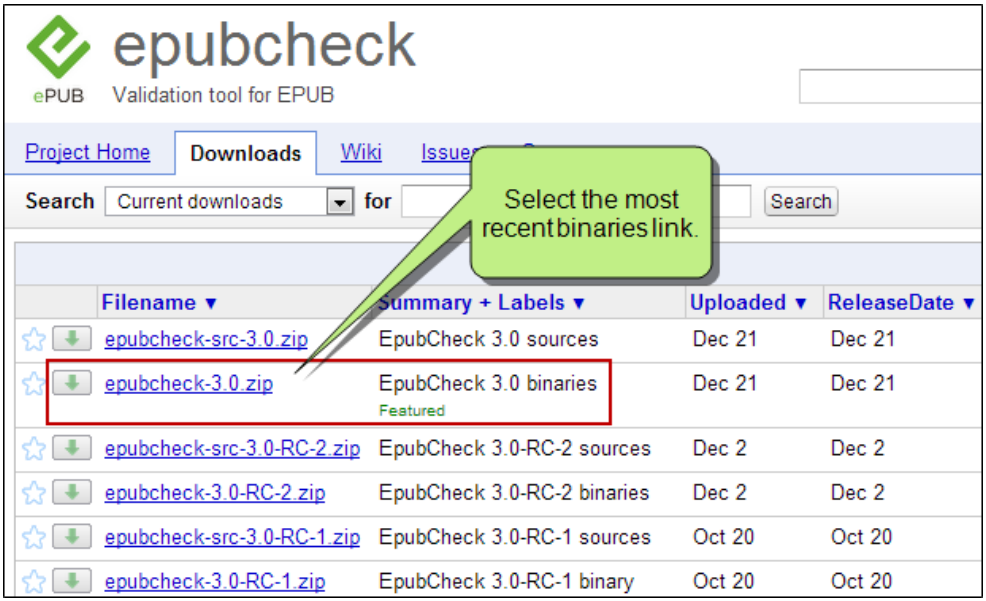
VALIDATE EPUB3 OUTPUT

Use these fields to validate EPUB output so that it will be acceptable to most online stores, such as amazon.com.

a. Select **Enable Epub 3 validation**.

b. Click the **Download EpubCheck** link. A website opens.

c. Click the link you want to download. Newer versions are typically at the top. Select the most recent link for binaries and follow the steps online to download it to your computer.



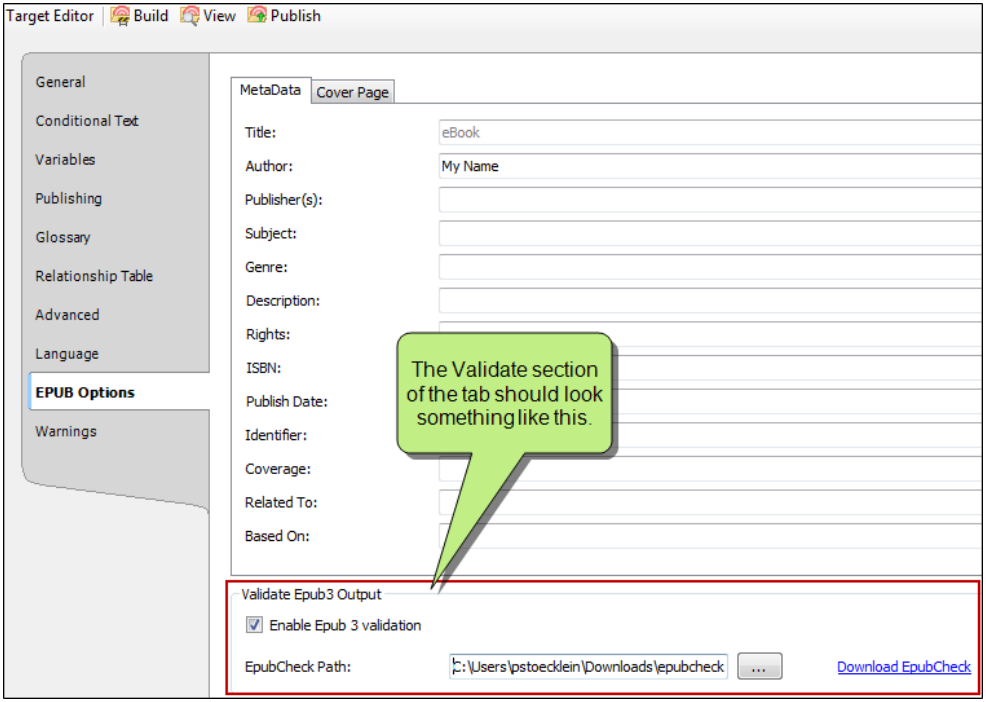
d. The file that you downloaded is a ZIP file, so you need to extract its contents.

e. Return to the EPUB Options tab in Flare.

f. Next to the **EpubCheck** field, click ...

g. Navigate to the extracted folder on your computer.

h. In the Open dialog, double-click the file with the **.jar** extension (e.g., **epubcheck-3.0.jar**).



i. Click to save your work.

When you are finished setting all EPUB options, you can generate the EPUB target. If validation fails, you should see related errors during the compilation process. You can then fix the issues and try to build again.

GENERATE MOBI OUTPUT

MOBI is the standard format used for the Amazon Kindle. You can use these fields settings to generate EPUB output that uses MOBI content.

a. Select **Generate MOBI file**.

b. Click the **Download KindleGen** link. A website opens.

c. Click the link you want and follow the steps online to download it to your computer.

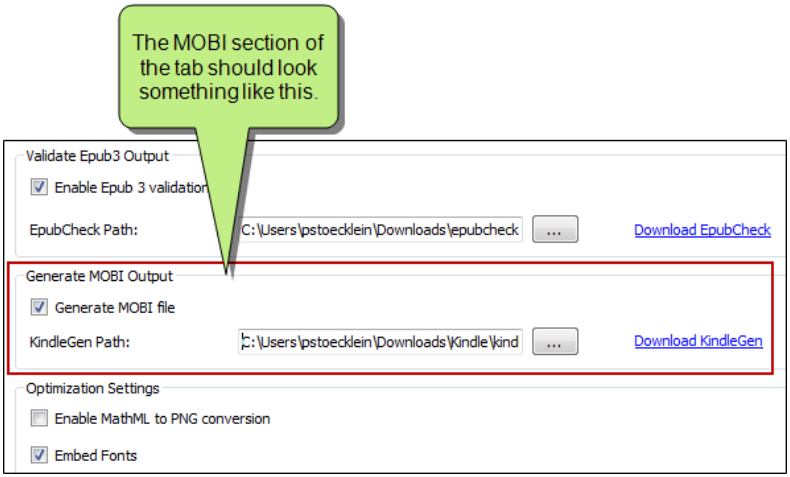
d. The file that you downloaded is a ZIP file, so you need to extract its contents.

e. Return to the EPUB Options tab in Flare.

f. Next to the **KindleGen Path** field, click ...

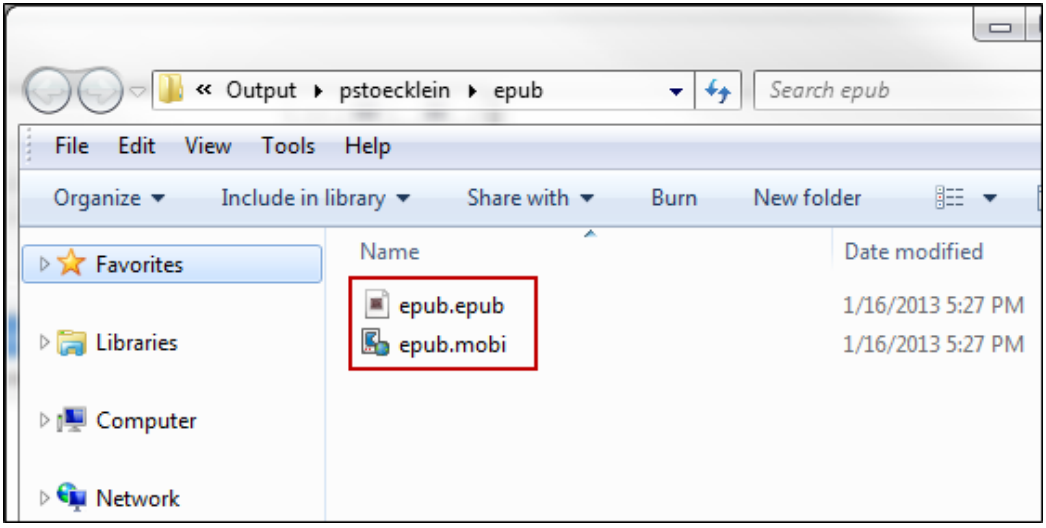
g. Navigate to the extracted folder on your computer.

h. In the Open dialog, double-click the file with the **kindlegen.exe** file.



i. Click to save your work.

When you are finished setting all EPUB options, you can generate the EPUB target. If you open the output folder, you will see that Flare has created a MOBI file in addition to an EPUB file. The MOBI file is all you need to view the ebook on a Kindle. The EPUB file can be used to view the ebook on other readers.



ENABLE MATHML TO PNG CONVERSION

If you use the Equation Editor to insert equations, you are in essence creating MathML markup. This type of content is supported for EPUB output.

If you need to produce output that can be displayed on older readers, you can select this option. All of your MathML content will be converted to PNG image files.

4. Click to save your work.

Note: For all supported image types (PNG, JPEG, JPG, GIF), the cover art in MOBI output has a minimum width or height of 300 pixels.

CHAPTER 9

Building Output

After you have completed the first part of the development process (i.e., creating and designing content, developing targets), you are ready to build the final output. Of course, you can build the output at any point during the development process, but if you make additional changes to content, targets, or the look and feel, you will need to build the output again to make sure the changes are included in the files that you deliver to your end users.

This chapter discusses the following:

Ways to Build Output 618
Build Progress Dialogs 619
Where Output Files are Stored 620
Building the Primary Target 621
Building a Single Target 622
Building Output Using a Batch Target 623
Viewing Output 632

Ways to Build Output

Building the final output involves generating one or more targets in your project, usually with just the click of a button or two. Following are the different ways you can build your final output.

- **Primary Target** Do this if you are only concerned about building the primary target for your project. See "Building the Primary Target" on page 621.
- **Single Target** Do this if you want to build a target that is not designated as your primary target. See "Building a Single Target" on page 622.
- **Batch Target** Do this if you want to build and/or publish one or multiple targets in a batch from the user interface, perhaps scheduled to run at a specific time. See "Building Output Using a Batch Target" on page 623.
- **Command Line/Batch** Do this if you want to build targets from your operating system's command line. Using this method, you do not have to open Flare at all. In addition, this method allows you to build a single target or all targets in your Flare project in one batch. The best way to use this feature is to create a batch file with the necessary commands in it. Then you can use a scheduling tool (such as the "Scheduled Tasks" utility in Windows) to run the batch file automatically whenever you want. This is similar to the "batch target" feature. However, the command line feature works outside of the Flare interface, is a bit more manual, and does not support as many processes. For steps see the online Help.
- **Build Then View Automatically** If you select an option in the user interface to view output from a target, Flare shows that output if it is up to date. But if there is no output or it is out of date, Flare gives you a message, asking if you want to build the output. This feature lets you avoid seeing this message for all targets in all projects. You can select an option to avoid seeing this message for all targets in all projects. This can be done in the Options dialog (**File>Options** or **Tools>Options**) by selecting the **Build** tab and choosing **Build target (if needed) after selecting 'View'**.

Warning: If your computer's anti-virus (AV) software scans the Output folder during the build process and you experience one or more "Build Failed" errors, the AV software may be preventing the build process from accessing the output files. To avoid this, you can temporarily turn off or disable your AV scan. You may also be able to exclude the Output folder, add Flare to an exceptions list, or postpone/reschedule scans to a different time. See your AV vendor for information.

Build Progress Dialogs

When you build targets, a Build Progress dialog shows the progress, including warnings or errors that may occur. This dialog contains the following tabs:

- **Messages Tab** This shows compiler messages and warning text. It is essentially a running log of what is happening as the output is generated.
- **Warnings Tab** This shows warnings reported by the compiler. Warnings do not prevent the output from being generated. Instead they might be issues that you need to fix (e.g., missing files) or suggestions for improving your output (e.g., accessibility settings). You can right-click on a warning and tell Flare to ignore it in future builds.
- **Errors Tab** This shows errors, which are critical problems that stop the project from building output.

When a target finishes building, you can do the following from this dialog:

- **Open Files With Warnings** In the Warnings tab, you can see information about each issue. If you double-click a row, the file that is shown in the File column is opened so you can deal with the issue.
- **Ignore Warnings** You can tell Flare to ignore certain warnings so that they do not display in the Build Progress dialog when generating output. You can do this in the Build Progress dialog by right-clicking on any warning message and selecting **Ignore Warning Globally** or **Ignore Warning in Target**. You can also ignore warnings from the Options dialog or the Target Editor.

  > **Warning:** It is recommended that you be careful with which compiler warnings you choose to ignore. Only ignore warnings that you are certain you do not need to receive.

- **Save Log** This saves the log file after an output has been generated so that you can refer to it later. The log file is stored in the Reports folder of the Project Organizer.

  You also have the option to do this automatically at a global level for all targets in all projects. This can be done in the Options dialog (**File>Options** or **Tools>Options**) by selecting the **Build** tab and choosing **Save log on build**.

- **View Output** This opens the generated output. You can also click the down arrow next to this button and select a specific browser or device to display the output. If you generated output that is enabled with responsive design, the Build Progress dialog includes view options not only for seeing output on a full browser output, but also on a tablet or smart phone. See "Viewing Output" on page 632.
- **Open Output Folder** This opens the project Output folder in Windows so that you can see the output subfolders and files.

Where Output Files are Stored

When you build a target, Flare creates output files and places them in a folder named after the target, which is stored in a subfolder of your project called "Output." For example, let's say your project is stored here: C:\MyProject. In that case, after you generate output, the files would be stored here:

C:\MyProject\Output\MyName\TargetName

Depending on the output type associated with the target, the generated output might consist of many files.

Building the Primary Target

Use the following steps if you want to quickly build the primary target for your project.

HOW TO BUILD THE PRIMARY TARGET

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select the face of the **Build Primary** button.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.
   - **Menu** Select **Build>Build Primary**.
   - **Project Toolbar** Click the face of Build Primary.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click Build.
   - **Keyboard Shortcut** Press **F6**.
2. After the output files finish generating, a message asks if you want to view the output. Click either **Yes** or **No**. If you select Yes, the generated output opens.
3. (Optional) If any errors or warnings occur during the process, you can save the report file by clicking **Save Log** in the Build Progress dialog. You can then open the error report file from the Reports folder in the Project Organizer. You can also ignore warnings that you do not want to see anymore.
4. (Optional) From the Build Progress dialog, you can view the output by clicking **View Output**.
5. (Optional) If you want to open the Windows folder holding the output files that were generated, click **Open Output Folder** in the Build Progress dialog.

Warning: If your computer's anti-virus (AV) software scans the Output folder during the build process and you experience one or more "Build Failed" errors, the AV software may be preventing the build process from accessing the output files. To avoid this, you can temporarily turn off or disable your AV scan. You may also be able to exclude the Output folder, add Flare to an exceptions list, or postpone/reschedule scans to a different time. See your AV vendor for information.

Building a Single Target

Use the following steps if you want to build a single target in your project that is not designated as your primary target.

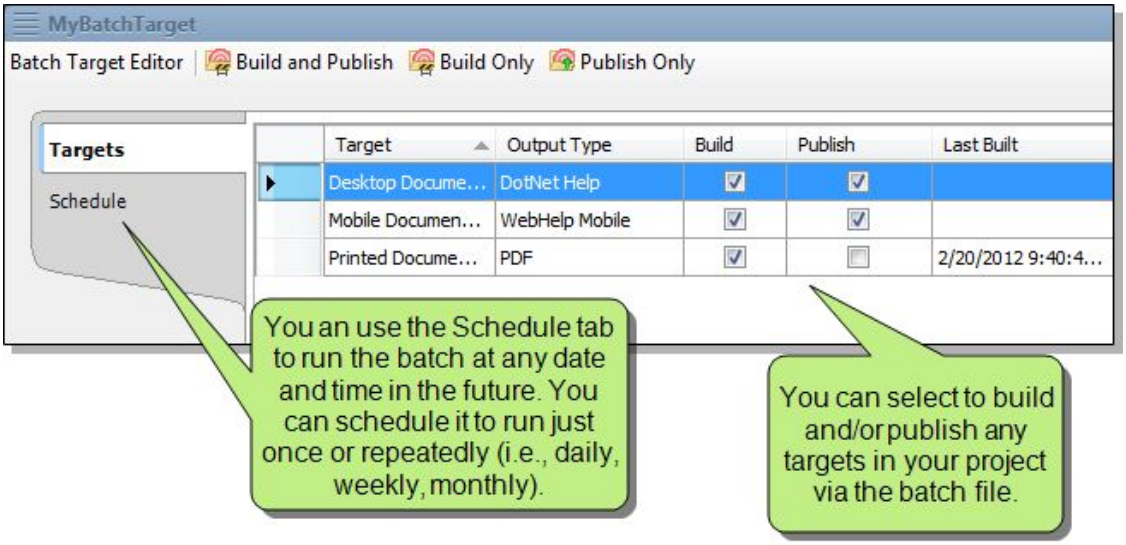
HOW TO BUILD A TARGET

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Build** section select **Build Primary>Build [name of target]**.
   - **Project Toolbar** Click the down arrow next to Build Primary and from the menu select the name of the target.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click Build.
   - **Right-Click** In the Project Organizer, open the Targets folder, right-click on a target, and from the context menu select **Build [name of target]**.
2. After the output files finish generating, a message asks if you want to view the output. Click either **Yes** or **No**. If you select Yes, the generated output opens.
3. (Optional) If any errors or warnings occur during the process, you can save the report file by clicking **Save Log** in the Build Progress dialog. You can then open the error report file from the Reports folder in the Project Organizer. You can also ignore warnings that you do not want to see anymore by right-clicking on them in the Warnings tab.
4. (Optional) From the Build Progress dialog, you can view the output by clicking **View Output**.
5. (Optional) If you want to open the Windows folder holding the output files that were generated, click **Open Output Folder** in the Build Progress dialog.

Building Output Using a Batch Target

Use the following steps if you want to generate and/or publish one or multiple targets in a batch from the user interface, perhaps scheduled to run at a specific time.



E X A M P L E

Let's say you have a project with 17 targets and you need to build and publish 12 of those targets at the beginning of each day. Rather than manually building and generating each of these targets, you can use a batch target. Within this batch target, you can select the "Build" and "Publish" options next to each of the 12 targets. Furthermore, you can use the Schedule tab in the batch target to specify that the batch should be run each night at 2 a.m. When you arrive at the office each morning, the outputs for those 12 targets will already be generated and placed in the appropriate publishing destination folders.

Batch Generate UI/Publish Versus Command Line

The batch target in the Flare interface is similar to the "command line" feature. However, the command line feature works outside of the Flare interface, is a bit more manual, and does not support as many processes.

Tasks Associated with Using a Batch Target

Following are the basic tasks associated with using the batch target feature to build and/or publish output.

- "Create a Batch Target" on the following page
- "(Optional) Schedule Build or Publish Processes" on page 627
- "(Optional) Manually Start Build or Publish Processes" on page 630

Create a Batch Target

First, you must create a batch target. The batch target is a simple file that points to other targets and stores information such as whether to build or publish targets, as well as scheduling commands. After creating the file, you can specify its settings in the Batch Target Editor. A batch target file has an .flbat extension and is stored in the Project Organizer under the Targets folder.

HOW TO CREATE A BATCH TARGET

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select **New>Batch Target**.
   - **Menu** Select **Project>Add Batch Target**.
   - **Right-click** In the Project Organizer, right-click on the **Targets** folder and from the context menu select **Add Batch Target**.

   The Add File dialog opens.
2. In the **File Type** field at the top, make sure **Batch Target** is selected.
3. In the **Source** area select one of the following:
   - **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

     > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

   - **New from existing** This lets you 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 the browse button ..., 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 that you previously created in the 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 batch target.
6. Click **Add**. The target is added to the Targets folder in the Project Organizer.
7. A message asks if you want to create a scheduled task. Click **Yes**. The Batch Target Editor opens to the right.

8. The Targets tab in the editor displays all of the other targets already contained in your project. Click the **Build** and/or **Publish** check boxes next to the targets that you want to be affected when the batch runs.

> **Note:** In order for targets to be published when the batch runs, you must also create and associate a publishing destination with the target(s). See "Creating Publishing Destinations" on page 641 and "Associating Publishing Destinations with Targets" on page 646.

9. Click to save your work.

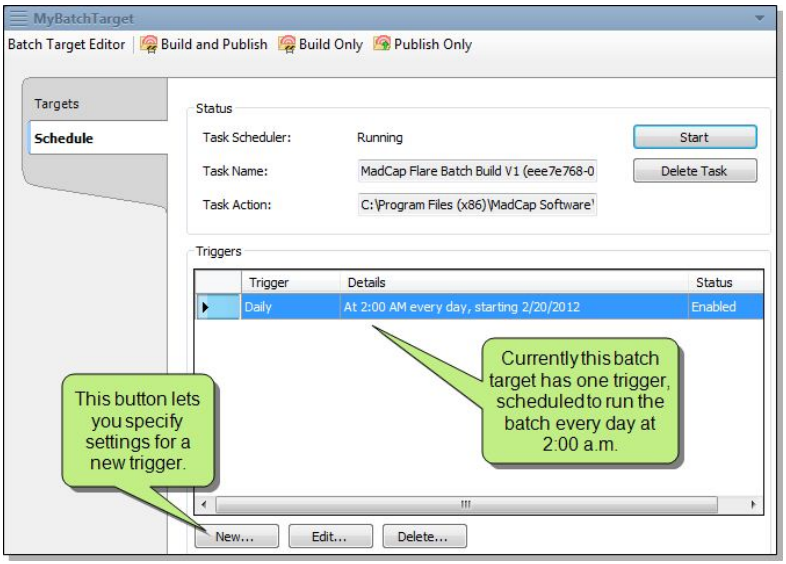
(Optional) Schedule Build or Publish Processes

After you create a batch target in the Flare user interface, you can start that batch whenever you need to (i.e., tell it to start building and/or publishing the related targets). However, you also have the option of creating scheduled tasks. You might do this if you want your targets to be generated or published automatically overnight. Scheduled builds are created using the Windows Task Scheduler. However, the user interface in Flare makes it easier for you to create scheduled tasks without leaving the application. If you use this scheduling feature, you do not need to have Flare open at the time the batch runs.

When a scheduled task runs, the command prompt window opens on your computer and minimizes while the batch runs. This window closes automatically when the batch process is finished. If any errors or warnings occur during the process, a report is automatically saved so you can review the messages. You can then open the error report file from the Reports folder in the Project Organizer.

HOW TO SCHEDULE BUILD OR PUBLISH PROCESSES

1. From the **Targets** folder in the Project Organizer, open the batch target file.
2. If a message indicates that you must create a scheduled task, click **Yes**.
3. In the Batch Target Editor, click the **Schedule** tab.
4. At the bottom of the tab, click **New**.



The New Trigger dialog opens.

5. In the **Settings** area, select how often you want the trigger in the batch to be run. You can also click in the **Start** fields to change the beginning date and/or time:
   - If you select **One Time**, click in the **Start** fields to change the beginning date and/or time.
   - If you select **Daily**, a field displays so that you can specify a certain number of days for the process to recur.
   - If you select **Weekly**, a field displays so that you can specify a certain number of weeks for the process to recur. In addition, check boxes are available so that you can select certain days of the week for the process to run.
   - If you select **Monthly**, additional fields are displayed so that you can select certain months for the process to run, even on specific days during particular months.
6. (Optional) In the **Advanced Settings** area, you can set any of the following.
   - **Repeat task every** You can specify if you want the trigger for the batch to run periodically after a certain number of minutes or hours.
   - **For a duration of** You can specify how long you want the trigger for the batch to be repeated.
   - **Expire** You can specify whether the trigger for the batch should stop running after a certain date.
   - **Enabled** By default the trigger for the batch will be enabled. However, you can disable the trigger if necessary. The trigger will remain in the batch file (even though it will not run while being disabled). You can re-enable it in the future if you want.
7. Click **OK**.

Tip: Because scheduled tasks in batch targets use Windows Task Scheduler, the settings in that utility are applied. By default, scheduled tasks will run only if you are logged on. However, you can change this setting in Windows Task Scheduler so that the batch runs whether you are logged on or not. To accomplish this, first open Windows Task Scheduler. The steps may be different depending on the operating system. For example, in Windows 7 click the **Start** button and select **All Programs>Accessories>System Tools>Task Scheduler**. Then select **Task Scheduler Library** to see a list of your scheduled tasks. In the list select the appropriate task and click **Properties**. Click **Run whether user is logged on or not** (in Windows 7 this is on the General tab). Click **OK**. You will be prompted to enter your Windows login password. When you are finished working for the day, log off your computer (instead of shutting down completely). The task will run as scheduled.

Note: If you create a scheduled task in a batch target, a .job file is automatically created in Windows Task Scheduler. If you delete the batch target from within Flare, the .job file is automatically removed from Windows

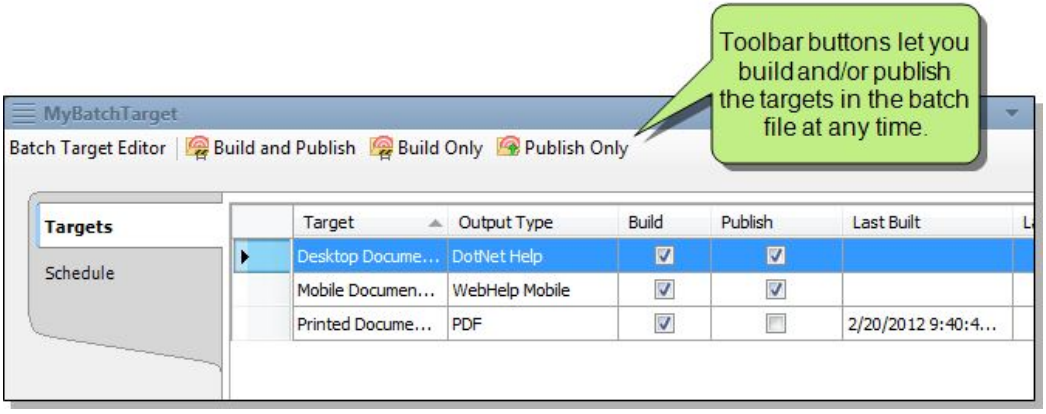
Task Scheduler. However, if you delete the project or batch target from Windows (outside of Flare), the .job file remains in Windows Task Scheduler. Therefore, you will need to remove the .job file manually from there.

(Optional) Manually Start Build or Publish Processes

Although you can schedule a batch target to run at a specific time, you can always open the batch target and manually start the batch.

HOW TO MANUALLY START BUILD OR PUBLISH PROCESSES

1. From the **Targets** folder in the Project Organizer, open the batch target file.
2. In the local toolbar of the Batch Target Editor, click any of the following.
   - Build and Publish Builds and publishes the selected targets (if they have check marks in the Build and Publish boxes in the batch target).
   - Build Only Builds the selected targets (if they have check marks in the Build box in the batch target).
   - Publish Only Publishes the selected targets (if they have check marks in the Publish boxes in the batch target).



   The Batch Progress dialog shows each target and its build status.

3. (Optional) If any errors or warnings occur during the process, you can save the report file by clicking **Save Log**. You can then open the error report file from the Reports folder in the Project Organizer. You can also ignore warnings that you do not want to see anymore.
4. (Optional) You can view the output of each built target—by selecting the target row in the Batch Progress dialog and clicking **View Output**.

5. (Optional) If you want to open the Windows folder holding the output files that were generated, select a target in the grid at the top of the dialog, then click **Open Output Folder**.
6. When the process finishes, click **Close** in the Build Progress dialog.

Warning: If your computer's anti-virus (AV) software scans the Output folder during the build process and you experience one or more "Build Failed" errors, the AV software may be preventing the build process from accessing the output files. To avoid this, you can temporarily turn off or disable your AV scan. You may also be able to exclude the Output folder, add Flare to an exceptions list, or postpone/reschedule scans to a different time. See your AV vendor for information.

Note: When you publish output using a batch target, changed files are replaced and stale files are always removed.

Note: You cannot use scheduled tasks for batch targets if you are working in trial mode.

Viewing Output

You can view the generated output for any of the targets in your project in the following ways:

- **Primary Target** View output for the primary target.
- **Specific Target** View output for a specific target in your project.
- **After Generating** View output for a specific target immediately after generating output; depending on the type of target, you can choose a specific browser or device (such as an EPUB reader) to view the output.
- **Automatic** View outputs automatically after generating targets.
- **Build Then View Automatically** If you select an option in the user interface to view output from a target, Flare shows that output if it is up to date. But if there is no output or it is out of date, Flare gives you a message, asking if you want to build the output. This feature lets you avoid seeing this message for all targets in all projects.

HOW TO VIEW OUTPUT FOR THE PRIMARY TARGET

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select the face of the **View Primary** button.
   - **Menu** Select **Build>View Primary**.
   - **Project Toolbar** Click the face of View Primary.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click View.
   - **Keyboard Shortcut** Press **SHIFT+F6**.
2. If the output for the target has not yet been generated or is out of date, a message lets you know and asks if you want to generate the output. Click **Yes**. The generated output opens.

HOW TO VIEW OUTPUT FOR A SPECIFIC TARGET

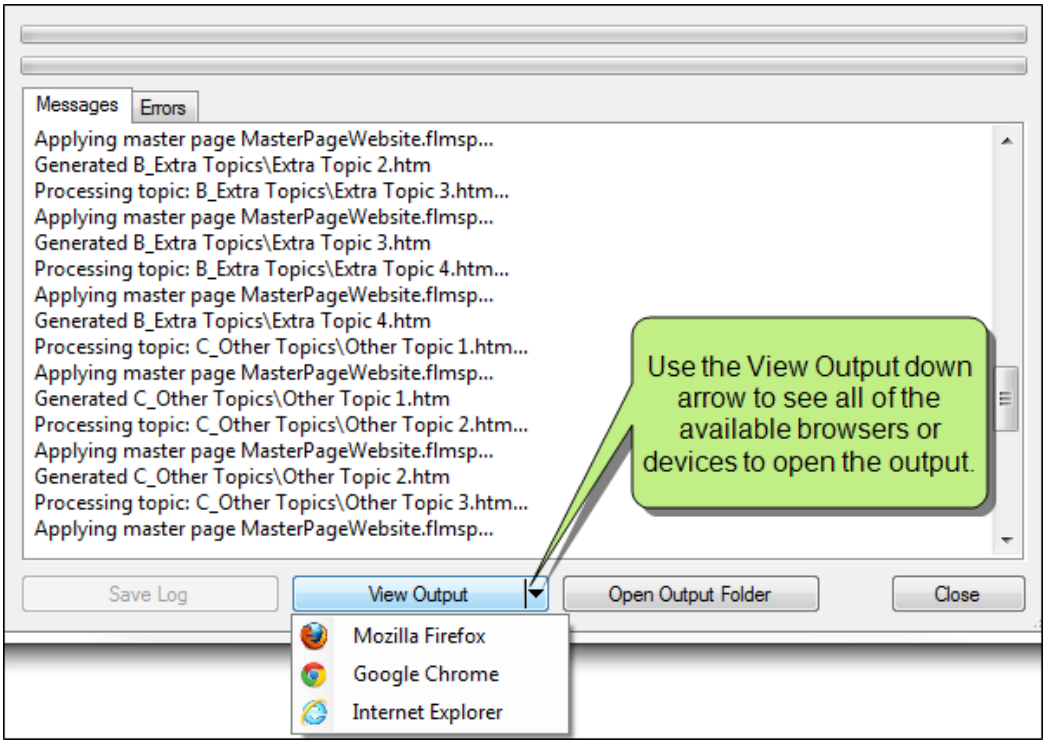
1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Build** section select **View Primary>View [name of target]**.
   - **Project Toolbar** Click the down arrow next to [View Primary] and from the menu select the name of the target.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click [View].
   - **Right-click** In the Project Organizer, open the Targets folder, right-click on a target, and from the context menu select **View [name of target]**.
2. If the output for the target has not yet been generated or is out of date, a message lets you know and asks if you want to generate the output. Click **Yes**. The generated output opens.

HOW TO VIEW OUTPUT IMMEDIATELY AFTER BUILDING IT

1. Generate output for the target.
2. When the build process finishes, a message asks if you want to view the output (if no errors or warnings are found). If you want to see it in the default browser or device, click **Yes**.

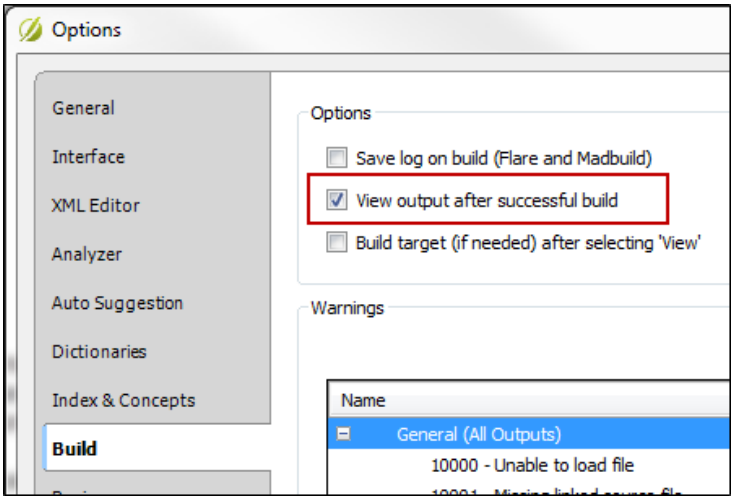
   If instead, you want to see it in a specific browser or device, click **No**. Then in the Build Progress dialog, click the down arrow next to the **View Output** button and select the browser or device.



HOW TO VIEW OUTPUTS AUTOMATICALLY

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **File>Options**.
   - **Menu** Select **Tools>Options**.

   The Options dialog opens.
2. Select the **Build** tab.
3. Select **View output after successful build**.



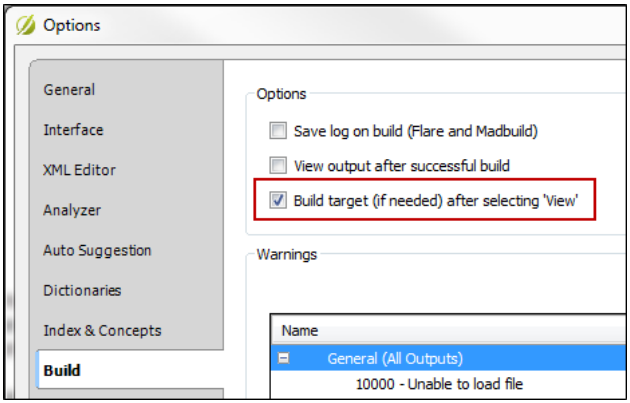
4. Click **OK**.

After you generate a target, the output will automatically open, without asking you first.

HOW TO BUILD OUTPUTS AUTOMATICALLY IF NEEDED WHEN SELECTING VIEW

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **File>Options**.
   - **Menu** Select **Tools>Options**.

   The Options dialog opens.
2. Select the **Build** tab.
3. Select **Build target (if needed) after selecting 'View'**.



4. Click **OK**.

CHAPTER 10

Distributing Output

Distributing Flare print-based output is often a matter of publishing a copy of the output file(s) to a location that your end users can access, or printing hard copies of the output file(s) to hand out. The number of files that are generated and need to be distributed depends on the output type you are creating and the settings that you provide when developing your project.

This chapter discusses the following:

Steps for Distributing Output 638
Creating Publishing Destinations 641
Associating Publishing Destinations with Targets 646
Publishing Output to Destinations 647

Steps for Distributing Output

Use the following steps to distribute your output to end users.

HOW TO DISTRIBUTE PRINT-BASED OUTPUT

1. You can simply open your Output folder to retrieve the files manually, or you can use Flare's publishing feature to automatically send a copy of the output files to another location (e.g., to a network folder or a website).

   TO RETRIEVE THE LOCAL FILES MANUALLY

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

   - **Ribbon** Select the **Project** ribbon. In the **Build** section select **Open Output Folder**.

     You can use the Options dialog to switch between ribbons and the classic tool strip layout. For more information see the online Help.

     Keep in mind that the smaller the application window becomes, the more the options in a ribbon shrink. Therefore, you might only see a small icon instead of text, or you might see only a section name displayed with a down arrow to access the options in it. You can hover over small icons to see tooltips that describe them. You can also enlarge the application window or click one of the section drop-downs in the ribbon to locate a hidden feature.

   - **Menu** Select **Build>Open Output Folder**.

   TO USE THE PUBLISHING FEATURE

   a. Create a publishing destination for your printed manual. See "Creating Publishing Destinations" on page 641.
   b. Associate the publishing destination with the target that you are using. See "Associating Publishing Destinations with Targets" on page 646.
   c. Build the output. See "Building Output" on page 617.
   d. Publish the output. See "Publishing Output to Destinations" on page 647.

   Note: You can also use a batch target to generate and/or publish multiple targets in a single batch file automatically. See "Building Output Using a Batch Target" on page 623.

2. Now you (or others) can print the manual from the destination and distribute it to end users. You can also provide the document in electronic form to end users. Which output files do you need to be concerned with? It depends on the output type.

   PDF

   PDF output consists of a file with a **.pdf** extension that you can print or distribute to users.

   XPS

   XPS output consists of a collection of XPS files that you can print or distribute to users. This includes:

   - A file with an **.xps** extension. This is the file that contains the consolidated topic content from your project. This is the main file and the only one that is essential. This is the file that you would provide to a printer or distribute to end users.
   - A Resources folder with **various ancillary files**, such as stylesheets and images.

   If you want users to download an XPS document from a server, you need to enable the server to do this by registering the MIME types and file extensions. For steps see the online Help.

   XHTML

   XHTML consists of a collection of XHTML files that you can print or distribute to users. This includes the following.

   - A file with an **.htm** extension. This is the XHTML file that contains the consolidated topic content from your project.
   - A file with an **.mcbook** extension. This file is used to display the chapters in the MadCap Book Viewer.
   - A Resources folder with **various ancillary files**, such as stylesheets and images.

   If you want to make XHTML output accessible for others, you need to include all of the files in the output mentioned in this list. Otherwise, when they view the output, certain elements (e.g., images) might be missing from the pages.

   EPUB

   EPUB output consists of a file with an **.epub** extension that you can distribute to users, who will be able to open the file on a variety of ebook readers.

   Note: Although EPUB is not really classified as either online or print-based output, it is structured more like a print-based manual than a Help system. Therefore, you can treat its distribution somewhat like an electronic PDF file.

WORD

Depending on your settings, Microsoft Word consists of one or more XML, DOC, DOX, XPS, or PDF files that you will distribute to users.

FRAMEMAKER

Depending on your settings, Adobe FrameMaker consists of one or more BOOK, FM, or PDF files that you will distribute to your users.

Note: When you build Word or FrameMaker output, Flare may create an extra folder called Resources (if your project contains ancillary files, such as images). If you want to embed images in your Word document, you can use an option on the Advanced tab of the Target Editor. If you want to embed images in your FrameMaker document, you will need to do so manually in FrameMaker. If you do not embed images in your Word or FrameMaker files and you move those output files to another location than your Output folder, you must remember to also move the Resources folder. Without that folder in the proper location, the referenced images will no longer be displayed in the output files. If you convert the Word or FrameMaker files to PDF, the images will then be incorporated into the PDF file, and you can move that single file anywhere you like.

Creating Publishing Destinations

When you build output from your project, Flare produces the output files and places them in a folder with your project files. Publishing simply has to do with copying those output files and placing them in a location where others can access them, such as on a network, a website, or a SharePoint server. Of course, you can manually copy the output files from your project folder and paste them wherever you'd like, or you can use FTP software to transfer them to a remote server. Flare's publishing feature is simply a way to do this more quickly and easily.

There is a little bit of setup work to complete initially when it comes to publishing your output. But once you are finished with the setup, the ongoing act of publishing your output files can be done with the click of a button.

The first step to setting up your project for publishing output is to create a publishing destination. You can create as many publishing destinations in your project as necessary, depending on how many locations you need to send your output files.

HOW TO CREATE A PUBLISHING DESTINATION

1. Make sure the Project Organizer is open.
2. Do one of the following:

   IF USING AN EXISTING DESTINATION

   a. Double-click the **Destinations** folder. The existing publishing destinations are shown. Depending on the project template you select, Flare may provide you with an initial destination to help get you started.

   b. Double-click the destination that you want to open. The destination opens in its own page in the Destination Editor. (If you want, you can also rename the destination to fit your needs.)

   IF CREATING A NEW DESTINATION

   a. Right-click the **Destinations** folder and select **Add Destination**. The Add File dialog opens.

   b. In the **Source** area select one of the following:

      » **New from template** This lets you choose either the factory template file or one of your own customized 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, expand the **Factory Templates** folder and click on a template file. If you want to use your own customized template file, expand the appropriate folder and click on a file. For more information about templates, see the online Help.

      > **Note:** In some dialogs and wizards you can click the **Manage Templates** button if you want to open the Template Manager. This lets you manage any of your template files (e.g., add new templates, enter descriptions for templates). For more information see the online Help.

      » **New from existing** This lets you 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 the browse button ..., use the Open File dialog to find a file, and double-click it.

   c. (Optional) If you want to place the file into a subfolder that you previously created in the Project Organizer, in the **Folder** field click ... and select the subfolder. Otherwise, keep the default location.

   d. In the **File Name** field, type a new name for the destination (e.g., FictionSoft Staging website, FictionSoft Live website, Network Documentation Folder).

   e. Click **Add**. The destination is added to the Project Organizer and opens in its own page in the Destination Editor.

3. Click in the **Type** drop-down field in the Destination Editor and select one of the following, depending on which method you want to use to publish the output files: **FTP**, **File System**, or **SFTP**. Use the FTP (File Transfer Protocol) option if you want to publish output files to another computer over a TCP/IP network and you are not overly concerned with security. Use the File System option if you want to publish the output to a location on your computer or to another drive on a network. If you have previously connected to a SharePoint server, you can use the "File System" type to choose a folder on that server as the destination. Use the SFTP option if you need a much more secure option than FTP.
4. Complete the rest of the fields in the different areas of the Destination Editor. The options that you see depend on which transfer option you selected above.

SERVER

- **Host Name** Enter or select the name of the remote server or the computer where the output files will be published (e.g., acme.com).
- **Port** Enter the port that you will use to connect to the remote server. Typically, you can obtain the port from your network administrator. The default port for FTP is 21, and the default port for SFTP is 22.
- **Login Credentials** Select this button to open the Log In dialog. You can then enter the user name and password required for accessing the server to which you are publishing. If you do not enter the user name and password at the point, a dialog will open later when you actually publish the output, asking for the user name and password.
- **Anonymous Login** Select this check box if you want to publish to the server without being required to enter a user name or password. (You may need to check with your network administrator to determine if this is allowed.)

SFTP SETTINGS

- **Server Validation**
  - **None** Select this if there is no validation of the SFTP server.
  - **Known Hosts File** Select this if the SFTP server is listed in a known hosts file.
  - **Public Key File** Select this to validate the server against a public key.
- **Hosts File** Click ... to find and select the hosts file.
- **Authentication**
  - **Password** Select this if the server connection is authenticated by the username and password set in the Login dialog (Login Credentials).
  - **Public Key** Select this if the server connection is validated against a public/private key pair match. You need to supply the private key and password for the server.
  - **Both** Select this if the server connection requires both the user and private key validation.
- **Key File** Click ... to find and select the key file.
- **Key Password** Enter the key password.

DESTINATION

- **Directory** Enter the exact location where the output files will be published. You might enter something like this: public_html/Help/FictionSoftPro. You can also leave the default setting of "public_html" if you are publishing to the root directory on the server.

  Note: When you publish your output, only the files and subfolders within your target's output folder are sent to the destination. The target output folder itself is not included. For example, let's say you have a target named "AdvancedOutput." If you want the output to be placed in a destination with the same folder name, you need to create the "AdvancedOutput" folder at the final location first. Then in your publishing destination file, you can point to that exact folder. When you publish the output, the necessary files will automatically be placed inside it.

- **Comment** You can use this field to provide a description of the destination so that its purpose is clear.
- **"View" Url** You can enter or select an .http address in this field to be used for viewing the published files. This field is optional and is for your own internal purposes.
- **Upload Log File** Select this option if you want Flare to publish the log file with the rest of your output files. You can disable this option so that the log file is not uploaded. However, keep in mind that if you do this, you cannot use either of the following options.

- **Upload Only Changed Files** Select this option if you want Flare to republish only the files that have changed. This can save significant time.
- **Remove Stale Files** Select this option if you want Flare to identify files that were previously published but are no longer needed. Flare will then remove such files from the destination.

For single-file outputs (such as Adobe PDF or Microsoft HTML Help), you might decide to disable publication of the log file. But for multi-file outputs (such as HTML5, WebHelp, DotNet Help, and others), you might prefer to use a destination file with this option enabled.

5. Click to save your work.

Associating Publishing Destinations with Targets

After you create a publishing destination, you need to associate it with a target that you plan to build. You can associate the same publishing destination with as many targets as you want.

HOW TO ASSOCIATE A PUBLISHING DESTINATION WITH A TARGET

1. Make sure the Project Organizer is open.
2. Double-click the **Targets** folder. The existing targets are shown.
3. Double-click the target that you want to associate with the destination. The target opens in its own page in the Target Editor.
4. Click the **Publishing** tab. All publishing destinations that have been added to the project are displayed. If a destination contains a check mark next to it, that means it is associated with the target. If it does not contain a check mark, it is not yet associated with the target.
5. Click the check box next to any destinations that you want to associate with the target. A check mark appears next to any destinations that you select.
6. Click to save your work.

Publishing Output to Destinations

After you create a publishing destination and associate it with a target, you are ready to publish your output to the destination.

You can publish output in the following ways.

- **Primary Target** You can quickly publish your primary target.
- **Single Target** You can publish a specific single target.
- **Batch Target** You can publish (and generate) multiple targets by using a batch target. You can even create a scheduled task so that the batch runs at a specific time (e.g., nightly at 3 am). For steps on using this method, see "Building Output Using a Batch Target" on page 623.

HOW TO PUBLISH YOUR PRIMARY TARGET TO A DESTINATION

1. If your output is not up to date, rebuild it. See "Building Output" on page 617.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Content** section select the face of the **Publish Primary** button.
   - **Menu** Select **Build>Publish Primary**.
   - **Project toolbar** Click the face of Publish Primary.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click Publish.
   - **Keyboard Shortcut** Press **CTRL+F6**.
3. If necessary, change any of the options in the Publish Target dialog.
   - **Publish** Add or remove the check mark next to any destinations (depending on whether you want to publish to that destination or not).
   - **Upload Log File** Select this option if you want Flare to publish the log file with the rest of your output files. You can disable this option so that the log file is not uploaded. However, keep in mind that if you do this, you cannot use either of the following options.
     - **Upload Only Changed Files** Select this option if you want Flare to republish only the files that have changed. This can save significant time.
     - **Remove Stale Files** Select this option if you want Flare to identify files that were previously published but are no longer needed. Flare will then remove such files from the destination.

     For single-file outputs (such as Adobe PDF or Microsoft HTML Help), you might decide to disable publication of the log file. But for multi-file outputs (such as HTML5, WebHelp, DotNet Help, and others), you might prefer to use a destination file with this option enabled.

4. Click **Start Publishing**.
5. If a user name and password are required and you have not already provided them in the Destination Editor, enter them in the dialog that opens.
6. After the files are successfully published, a dialog opens, asking if you want to view the log (which lists the files that have been uploaded). Click **Yes** if you want to see it, and close the log when you are finished.
7. In the Publish Target dialog, click **Close**.

HOW TO PUBLISH A SINGLE TARGET TO A DESTINATION

1. If your output is not up to date, rebuild it. See "Building Output" on page 617.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Build** section select **Publish Primary>Publish [name of target]**.
   - **Project toolbar** Click the down arrow next to Publish Primary and from the menu select the name of the target.

     To open the Project toolbar from the menu view, select **View>Toolbars>Project**.
   - **Local Toolbar** In the local toolbar of the Target Editor click Publish.
   - **Right-Click** In the Project Organizer, open the Targets folder, right-click on a target, and from the context menu select **Publish [name of target]**.
3. If necessary, change any of the options in the Publish Target dialog.
   - **Publish** Add or remove the check mark next to any destinations (depending on whether you want to publish to that destination or not).
   - **Upload Log File** Select this option if you want Flare to publish the log file with the rest of your output files. You can disable this option so that the log file is not uploaded. However, keep in mind that if you do this, you cannot use either of the following options.
     - **Upload Only Changed Files** Select this option if you want Flare to republish only the files that have changed. This can save significant time.
     - **Remove Stale Files** Select this option if you want Flare to identify files that were previously published but are no longer needed. Flare will then remove such files from the destination.

     For single-file outputs (such as Adobe PDF or Microsoft HTML Help), you might decide to disable publication of the log file. But for multi-file outputs (such as HTML5, WebHelp, DotNet Help, and others), you might prefer to use a destination file with this option enabled.
4. Click **Start Publishing**.
5. If a user name and password are required and you have not already provided them in the Destination Editor, enter them in the dialog that opens.
6. After the files are successfully published, a dialog opens, asking if you want to view the log (which lists the files that have been uploaded). Click **Yes** if you want to see it, and close the log when you are finished.
7. In the Publish Target dialog, click **Close**.

APPENDIX A

PDF Guides

The following PDF guides are available for download from the online Help.

Accessibility Guide
Analyzer Guide
Autonumbers Guide
Condition Tags Guide
Context-sensitive Help Guide
DotNet Help Guide
Eclipse Help Guide
Getting Started Guide
Global Project Linking Guide
HTML Help Guide
HTML5 Guide
Images Guide
Importing Guide
Index Guide
Key Features Guide
Language Support Guide
Movies Guide
Navigation Links Guide
Print-based Output Guide
Project Creation Guide
Pulse Guide
QR Codes Guide
Reports Guide
Reviews & Contributions Guide
Search Guide
SharePoint Guide
Shortcuts Guide
Skins Guide

Snippets Guide

Source Control Guide

Styles Guide

Tables Guide

Tables of Contents Guide

Targets Guide

Templates Guide

Topics Guide

Touring the Workspace Guide

Transition From FrameMaker Guide

Variables Guide

WebHelp Outputs Guide

What's New Guide

APPENDIX B

Output Type Comparison Tables

Following are tables that show the various output types available, with the distinguishing features of each.

✓ Supported

✓ Supported with limitations

✗ Not supported

Note: If an item does not have a check mark, that does not necessarily mean the feature is unavailable in the output. Rather, it means that the feature cannot be added in Flare. For example, search cannot be added in Flare for EPUB output, but some ebook readers may have search built in.

General

Following are general features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
.NET Integration	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Main Entry File Extension	.mchelp	.xml or .jar	.chm	.htm	.htm	.htm	.htm	.air	.fm or .book	.pdf	.xml (default)	.htm	.xps	.epub or .mobi
Output Window or Application	MadCap Help Viewer	Eclipse Help Viewer	Microsoft HTML Help Viewer	Browser Window	Browser Window	Mobile Web Browser	Browser Window	Application Window	Adobe FrameMaker	Browser Window or Adobe PDF Reader	Microsoft Word	Browser Window	Browser Window	Ebook Reader or Web
Responsive Output	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Single Output File Possible	✗	✓	✓	✗	✗	✗	✗	✓	✗	✓	✓	✗	✓	✓

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Special Requirements	MadCap DotNet Help Viewer	Eclipse Standard 4.3.1 (Kepler) or higher Java (V7 Update 45) or later	Internet Explorer	✗	✗	✗	IIS ASP.NET MS Indexing Service	Java Runtime Environment (JRE) Adobe AIR	✗	✗	✗	✗	✗	Reader

Accessibility

Following are accessibility features (e.g., Section 508, WCAG) supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Accessibility Supported	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✗	✓
Compiler Warnings	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✗	✗
Empty Alt Text for Images	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✗	✗
Scrolling for Toolbars and Navigation Frames—Enable	✗	✗	✗	✗	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗

Generated Content

Following are generated content features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Autonumbers	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Breadcrumbs	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Browse Sequences	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Concept Links	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Keyword Links	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
List of Concepts	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
List of Elements	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
List of Endnotes	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Lists (Numbered and Bulleted)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Page Numbers	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✗
Related Topics Links	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Relationship Links	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Scripts	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Shortcut Controls	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Topic Toolbars	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗

Glossaries

Following are glossary features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Glossaries—Created via Glossary File and Proxy	✗	✓	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Glossaries—Created via Glossary File and Skin Setting	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Auto-generate	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓

Horizontal Rules

Following are horizontal rule features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Horizontal Rules Supported	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✓

Images

Following are image features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML 5	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Images Supported	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Image Hyperlinks	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✓
Image Maps	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Pre-Compile Resized	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✓
Thumbnail Images	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Web-Safe—Convert from Non—Web-safe	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗

Indexes

Following are index features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Indexes—Created Using Keywords and Proxy	✗	✓	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Indexes—Created Using Keywords and Skin Setting	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Auto-generate	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Binary Indexes	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Bookmarks in Index Entries	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Index Links	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Search—Can Exclude Index Entries from Search	✓	✗	✗	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗

Language Support

Following are language support features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Author and Generate Output in Left-to-Right (LTR) and Right-to-Left (RTL) Languages	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Invert Image Callouts to RTL	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓
Invert Page Layouts to RTL	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✗
Invert Styles to RTL	✗	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓
Output Interface—Display in LTR and RTL	✗	✓	✗	✓ Regular skin (UI Text tab)	✓ Language skin	✓ Language skin	✓ Language skin	✓ Language skin	✗	✗	✗	✗	✗	✗

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Output Interface—Display English, French, Japanese, or German	✓ Possible with Help Viewer (end user selects language)	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Language Skins	✓	✗	✓	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Separate UI Text tab in Skin Editor for Localization	✗	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗

Master Pages and Page Layouts

Following are master page and page layout features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML 5	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Master Pages Supported	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✗	✗
Page Layouts Supported	✗	✓	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✗

Miscellaneous Features

Following are miscellaneous features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Equations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Footnotes	✓ Converted to popup	✓	✓ Converted to popup	✓ Converted to popup	✓ Converted to popup	✓ Converted to link	✓ Converted to popup	✓ Converted to popup	✓	✓	✓	✓	✓	✓
Object Positioning	✗	✓	✗	✗	✗	✗	✗	✗	✗	✓	✗	✓	✓	✗
QR Codes	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Preview Topics in Output Type	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✓
Redacted Text	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✓	✓	✗

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Slideshows	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Snippets	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Tables	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Text Boxes	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗	✓	✓	✗

Navigation Links

Following are navigation link features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Cross-References Supported	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Cross-References—Context-Sensitive	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Drop-down Text	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Expanding Text	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Text Hyperlinks	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Text Popups	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Togglers	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Topic Popups	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗

Tables of Contents and Mini-TOCs

Following are table of contents (TOC) and mini-TOC features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML 5	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
TOCs—Created via Headings and Proxy	✗	✓	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓ Some ebook readers have built-in TOC
TOCs—Created via TOC File and Skin Setting	✓	✗	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Auto-generate	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Binary TOCs	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Mark as New	✗	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✓	✗	✗

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Mini-TOCs	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Skin—Select for TOC Entry	✗	✗	✓	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗	✗
Synchronize With Topics	✓	✗	✓	✓	✓	✗	✓	✓	✗	✗	✗	✗	✗	✗

Target Settings

Following are target features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Auto-generate Glossary, Index, TOC	✗	✗	✗	✗	✗	✗	✗	✗	✓	✓	✓	✓	✓	✓
Characters and Spaces—Replace With Underscores	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
CMYK	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✗	✗
Content Folder—Omit from Output	✗	✓	✓	✓	✓	✗	✓	✓	✗	✗	✗	✗	✗	✗
Crop and Registration Marks—Include in Output	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✗	✗

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
DOCTYPE Declaration	✓	✗	✓ Recommend disabling this option for non-English content	✗	✓	✓ Standard mobile DOCTYPE always used	✓	✓	✗	✗	✗	✗	✗	✗
Empty Pages—Inject Automatically	✗	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✗	✓	✗
File Extensions—Custom	✓	✓	✗	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Mark of the Web	✗	✓	✗	✓	✓	✗	✓	✗	✗	✗	✗	✗	✗	✗
Meta Tags—Custom	✓	✓	✓	✓	✓	✓	✓	✓	✗	✗	✗	✗	✗	✗
Startup Topic	✓	✗	✓	✓	✓	✗	✓	✓	✗	✗	✗	✗	✗	✗

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML 5	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Stylesheet Medium	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Warnings—Ignore	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Variables

Following are variable features supported in each output type:

	ONLINE								PRINT					OTHER
	DotNet Help	Eclipse Help	Microsoft HTML Help	HTML	WebHelp	WebHelp Mobile	WebHelp Plus	AIR	FM	PDF	WORD	XHTML	XPS	EPUB
Custom Variables	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Heading Variables	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
Running HF Variables	✗	✗	✗	✗	✗	✗	✗	✗	✓	✗	✓	✗	✗	✗
System Variables	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓

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