MadCap Software

Reviews & Contributions Guide

Flare 10

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THIS GUIDE WAS CREATED USING MADCAP FLARE.

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CHAPTER 1

Introduction

Flare provides for close collaboration between authors and other individuals through the use of file reviews and contributions. Contributors and reviewers can use a separate application called Contributor when collaborating with you and your Flare project. You can also send files for review to other Flare authors.

This chapter discusses the following:

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Features

Following are some of the key features available for topic reviews and contributions.

- **Annotations** You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use. See "Inserting Annotations" on page 54.
- **Contribution Templates** In order to accommodate and assist the contribution process, you can create contribution templates for other individuals to use. These templates are topic files that can be crafted to already have certain pieces in place (e.g., text, formatting, locked regions) and make certain ancillary files available (e.g., variables, condition tags, stylesheets) to the contributor. After using the template to create a new document in Contributor, the contributor can send it to you, and you can then make the document part of your project. See "Creating and Sending Contribution Templates" on page 44 and "Sending Contribution Templates" on page 47.
- **Emailing** Thanks to tight integration with Microsoft Outlook, topics can quickly be emailed back and forth for review. The necessary file is automatically attached to the email, and the default email message text is provided. You can also save email messages to use again in the future, and you can add email addresses to an address book for enhancing quick file transfers. See "Sending Files for Review" on page 14, "Creating and Sending Contribution Templates" on page 44, and "Sending Contribution Templates" on page 47.

  Note: This works with 32-bit versions of Microsoft Office, not 64 bit.

- **SharePoint and External Resources** When you share review and contribution files with others, you can use SharePoint integration or the external resource files feature as an alternative to sending the files through emails. For more information see the online Help.
- **Locks** This feature is not limited to reviews and contributions, but it comes in quite handy in those processes. You can put a lock on certain parts of a topic or contribution template, which lets individuals see those areas, but not modify them. See "Locking Elements" on page 35.
- **Review Ribbon and Toolbar** The Review ribbon and toolbar let you perform many of the tasks involved with reviews, such as sending topics for review, importing review packages, tracking and accepting changes, and inserting annotations. For more information see the online Help.
- **Snippets** Not only can you send topics for review, but snippets as well. In addition, if you are sending a topic or snippet for review and that file contains snippets, those snippets are automatically included as part of the review package too. For more information see the online Help.
- **Track Changes** You can track changes made to content files edited in the XML Editor and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar (see "Tracking Changes" on page 65).You can change the way tracked changes are displayed in the

interface—e.g., in balloons, inline (see "Changing the Display of Tracked Changes" on page 72). The tracked changes for each user can be shown in a separate color. You also have the option of choosing a specific color for all users (see "Changing the User Color for Reviews" on page 60).

Note: When you send files for review or receive review packages from others, changes made to those files are automatically tracked.

» **User Name and Initials** You can modify the user name and initials that are part of annotations and the track changes feature. You can do this from the Review tab in the Options dialog. See "Changing Your User Name and Initials" on page 62.

Review Workflow—Sending to Others

Following are the steps involved for sending files out for review.

1. **(Optional) You—Open File** Open a topic or snippet that you want to send for review.

   If you intend to send multiple files for review at once, you do not need to open each one. You can use a wizard to add more files when you get to step 3.

2. **(Optional) You—Lock elements** If you want to ensure that the other individual(s) do not make changes to certain portions of the file, you can apply locks to specific elements within it. See "Locking Elements" on page 35.

3. **You—Send File to Reviewers** Email one or more files to other individuals for review. Alternatively, you can use the "Save Package" option to store the review package file in a location where the reviewer can access it, such as in a SharePoint or external resources folder. See "Sending Files for Review" on page 14.

4. **Reviewers—Open Review Package** The reviewers open review package (.fltrev file) in Contributor or in Flare.

5. **Reviewers—Insert Annotations/Make Edits** In Contributor or Flare, the reviewer inserts annotations and/or makes changes to the file (if full registered mode instead of annotation-only free mode). Changes are automatically tracked. Also, if the files you sent already had tracked changes in them, the reviewer can accept or reject those changes.

6. **Reviewers—Save and Return Package** After finishing inserting annotations and/or making edits, the reviewer saves the package file and returns it to you (via email, SharePoint integration, or external resources).

7. **You—Open File** Open the .fltrev package file. In the dialog that opens, you can choose to copy the review file into the inbox in the appropriate Flare project (so that you can integrate it back into the project), or you can choose to open the file in the Flare interface to simply view it.

8. **You—Take Action on File** Do one of the following, depending on the option you selected.

   - **If You Copied the File to the Inbox in Your Flare Project** You can open your inbox in the Topic Reviews window pane to access the reviewed files (see "Viewing Reviewed Files in the Inbox" on page 27). Then you can do the following.

     - **Accept Files** After you accept a reviewed file, it will overwrite the original file in your project. The new file will therefore include all annotations and tracked changes from the reviewed copy. The reviewed file will also be removed from the inbox. See "Accepting Reviewed Files" on page 29.

       If conflicts are detected, you can merge reviewed files. See "Merging Reviewed Files" on page 30.

     - **Accept or Reject Tracked Changes** You can accept or reject tracked changes individually, or you can do this for all changes in the file. This can be done either in the reviewed file before it is accepted, or it can be done after the reviewed file is accepted. See "Accepting or Rejecting Tracked Changes" on page 70.

   - **If You Opened the File in Flare** You can quickly view the file, insert your own annotations and/or edit the file, and then send it back to the reviewer for more work.

Review Workflow—Receiving from Others

Following are the steps involved when you receive files from other Flare authors for review.

1. **Open** You can open the review package file (from your email, from SharePoint, or from an external resource folder). In the dialog that opens, select **Open the package in Flare for review**, and click **OK**. Flare launches and the files in the review package are listed in the Review Packages window pane. Double-click a row to review and edit a particular file.

   If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets this by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Link**.

2. **Edit** You can edit the content in Flare, and your changes are tracked automatically. Also, if the file you received already had tracked changes in it, you can accept or reject those changes. After you return the review package, the other author can see your changes and accept or reject them.

3. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Inserting Annotations" on page 54.

4. **Return** You can return the review package to the author via email, or by using SharePoint Integration or the external resources feature.

Contributions Workflow

Following are the steps involved in the contribution process.

1. **(Optional) You—Create Contribution Template** If you want to give contributors prepared files and content to use when creating documents, you can create and send contribution templates to them. Otherwise, contributors can simply create new documents using standard factory templates. See "Creating and Sending Contribution Templates" on page 44 and "Sending Contribution Templates" on page 47.

   If you want to ensure that the contributor does not make changes to certain portions of the topic, you can apply locks to specific elements within it. See "Locking Elements" on page 35.

2. **(Optional) Contributors—Save Template** If you send a contribution template to the contributor, that person can save the template in a particular location on his or her local drive to be opened later when creating new documents.

   Note: If contributors save the template file, they can do so anywhere on their local drive. However, if you want the contributor to be able to use the template when creating brand new documents in Contributor, the template file should be saved to a specific location in that individual's Documents\My Templates folder ("My Documents" in some operating systems).

   To do this, the contributor can open his or her "Documents" folder and create a subfolder named "My Templates." Then, within that folder, the contributor should create another folder named "Contributor." The contributor should place your template file within it. In other words, the contributor saves your contribution template file to a folder called "Documents\My Templates\Contributor."

   Why go through all of this? Because when the contributor creates a new document, he or she can select your template to start the new document with the same elements from the template file. You might use this method, for example, if you plan to periodically receive contributions from a developer and you want that person to always send you topics that contain the same introduction text and use the same formatting. Rather than making the developer perform those tasks (or "fixing" the document yourself after receiving it from the developer), you can ensure that the pieces are all there when the developer first creates the document. Then the developer can simply concentrate on adding content.

   Note: Any templates that you created in the past for X-Edit can still be used in Contributor, but those files will need to be relocated to the new Contributor folder location in order to use them when creating new documents.

3. **Contributors—Create** The contributor can create a new document (MCCO file) in Contributor (with or without using your template).

When creating documents, contributors can either use a standard factory template provided by Contributor (by selecting **Factory Templates** in the New Document dialog), or they can use the contribution template that you provided (by selecting **My Templates**, if they have previously saved the template to the appropriate folder in Documents\My Templates\Contributor).

4. **Contributors—Send File** After finishing the file, the contributor sends it to you (via email, or by using SharePoint integration or the external resources feature). There are options from the Contributor interface for doing this.
5. **You—Open File** Open the contribution file (from your email, from SharePoint, or from an external resource folder). A message indicates that the file is added to the Documents\My Incoming Contributions folder on your computer. You can then access the file from the Contributions window pane in your project.

> **Note:** You can also import contribution files from another location. See "Importing Contribution Files" on page 51.

6. **You—Accept File** From the Contributions window pane you can view and accept the topic. See "Viewing Contribution Files" on page 48 and "Accepting Contribution Files" on page 49.

CHAPTER 2

Reviews—Sending to Others

You can email review package files containing topics and/or snippets to other individuals for their feedback and/or changes. Alternatively, you can use SharePoint integration or the external resources feature to store the review package files. The reviewer's changes are always automatically tracked so you can see what edits were made. After inserting annotations (comments) or making changes to a file with Flare or with Contributor (for non-Flare users), reviewers can send the package back to you. You can then view those comments and accept or reject the edits so that they are added to the source file(s). In order to take full advantage of this process, reviewers should have a full, purchased version of either Flare or Contributor.

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Sending Files for Review

Following are steps for sending files to others for review.

HOW TO SEND FILES FOR REVIEW

1. Do one of the following:
   - Open a file (topic or snippet).
   - In the Content Explorer, select a file (topic or snippet).
   - In the File List window pane (**View>File List**), select one or more files (topic or snippet). You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
   - Open a table of contents (TOC) or browse sequence and select one or more entries within it. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

     Note: If you use the TOC option, individuals who receive the review package can view that package as a TOC using the TOC view option in the Review Packages window pane. This allows them to see the context and organization of the material that you send.

2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Packages** section select **Send For Review**.

     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 **Review>Send For Review**.
   - **Review Toolbar** Click Send For Review...

     To open the Review from the menu view, select **View>Toolbars>Review**.
   - **Local Toolbar** Click .
   - **Right-Click** If you have a TOC or browse sequence open, right-click the entry and from the context menu, select **Send For Review**.

The Send Files For Review Wizard opens. If you selected a topic that contains snippets, those snippets are also automatically added to the package.

3. (Optional) In the **Review Package Name** field you can enter a name for the package file that will be sent to the reviewer.
4. (Optional) If you want to add more files to the package file, do the following:
   a. Click .
   b. Use the multi-view buttons to find the file(s) you want to add. If you want to add multiple files, make sure is selected.

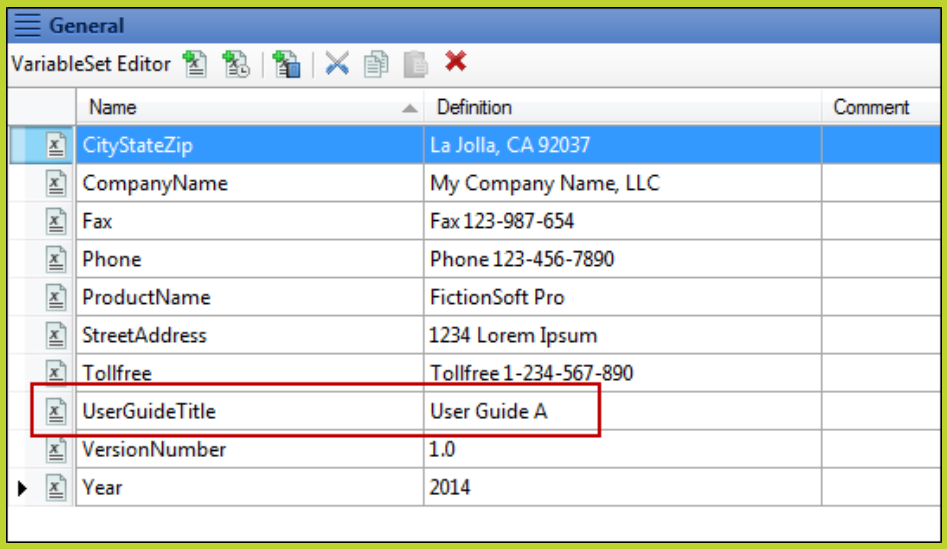
	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the Show Folders button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	Shows or hides hidden files and folders.
	If the Show Files button is the only one selected, you can click this button to move up one folder level.

   c. Find and select the file(s) you want to add to the package file. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items. When you are finished click **Open** in the dialog.

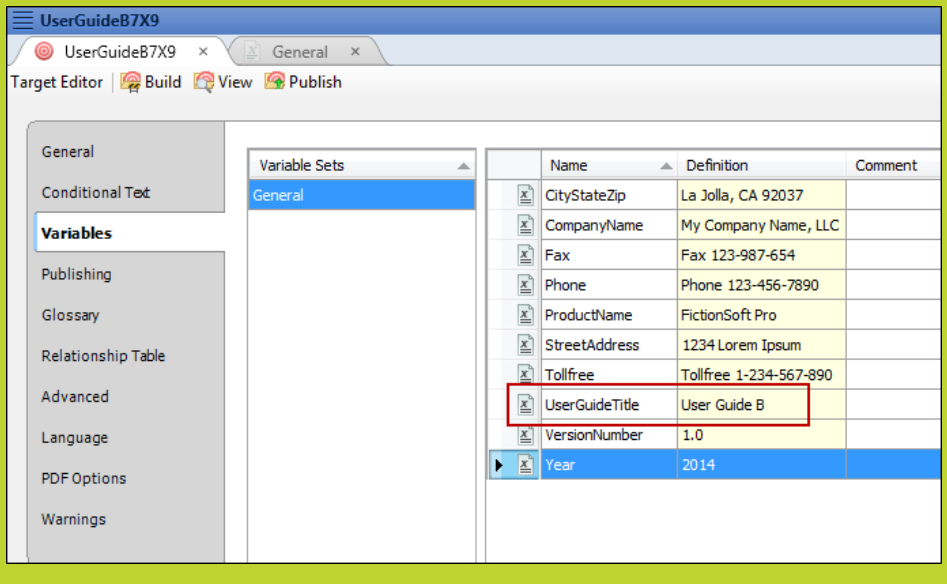
5. (Optional) If you have overridden any default variable definitions for a particular target, and you want the reviewer to see that definition rather than the default one, click in the drop-down field and select it.

E X A M P L E

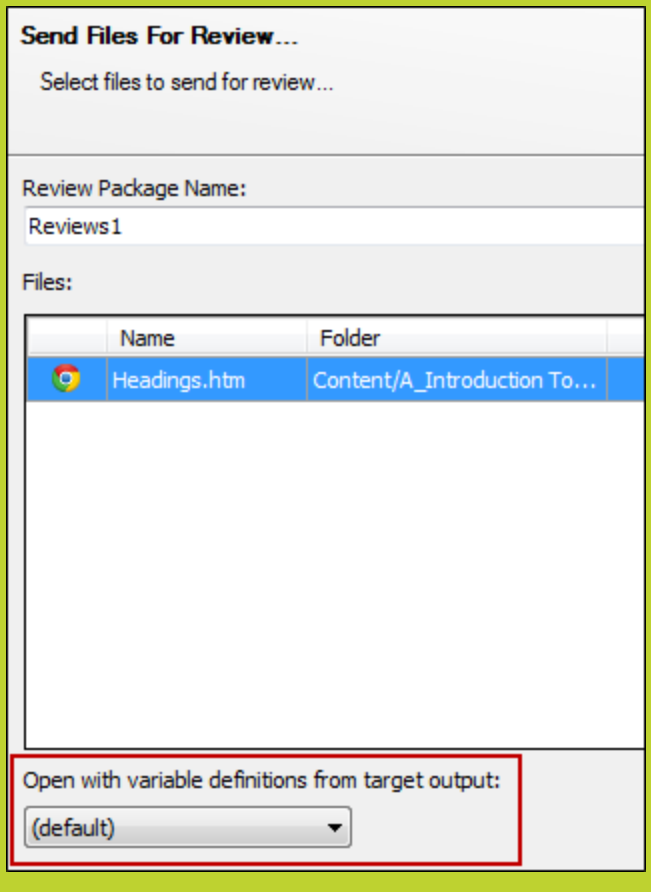
Let's say you have a variable called "UserGuideTitle," and your default definition for it in the Variable Set Editor is "User Guide A."



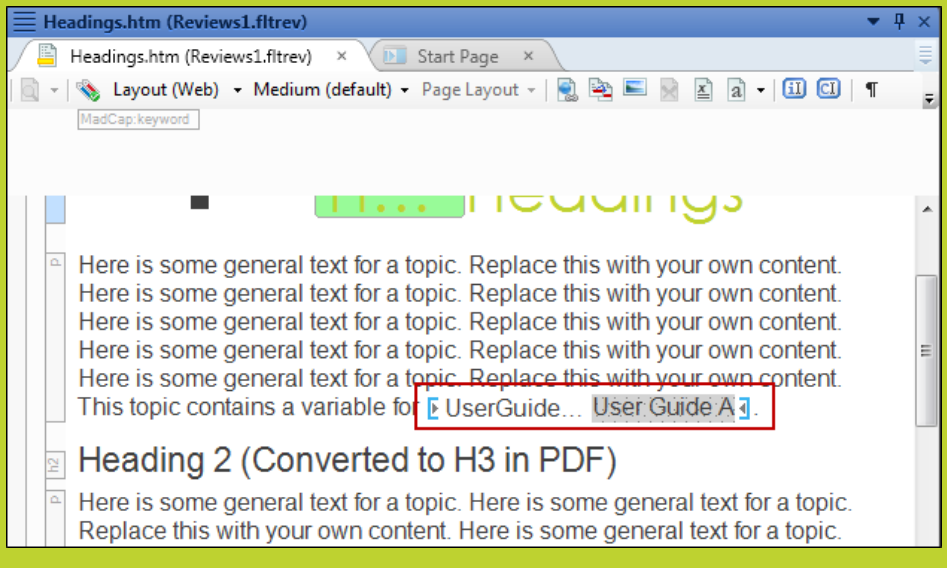
However, for some targets, you override that definition in the Target Editor so that it becomes "User Guide B."



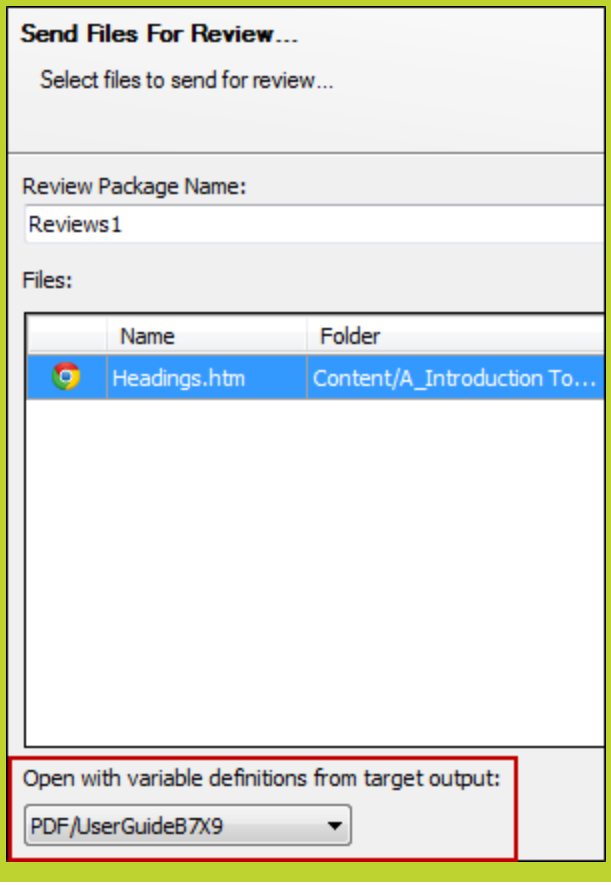
Suppose you send a topic for review that has the variable inserted into it, and you keep the default variable selection in the Send Files for Review Wizard.



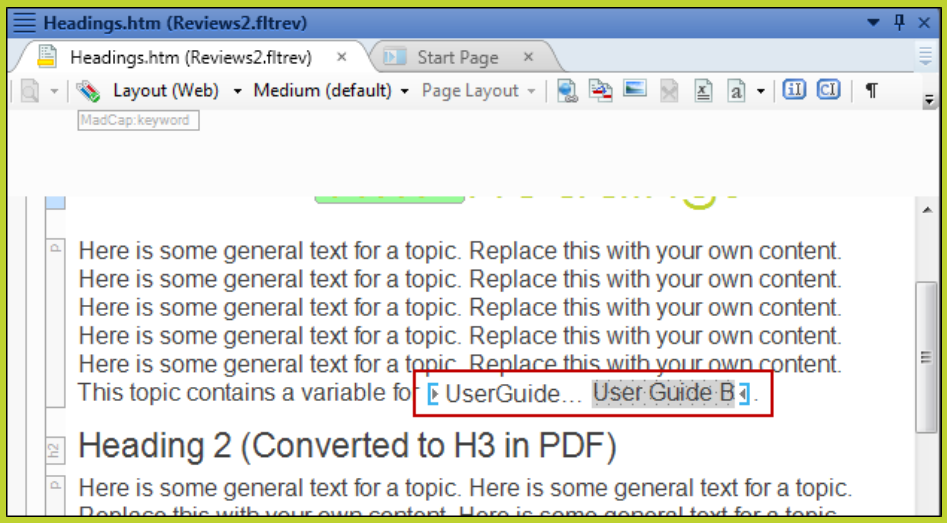
In that case, the reviewer sees the "User Guide A" variable definition.



On the other hand, in the Send Files for Review Wizard let's say you select a target that uses the alternate definition.



In that case, the reviewer see the "User Guide B" variable definition.



6. (Optional) If you want to include or exclude content in the review files based on condition tags, do the following:

   a. Click . The Conditional Text dialog opens.

   b. You can include or exclude conditions in a couple of different ways. You can even use both:

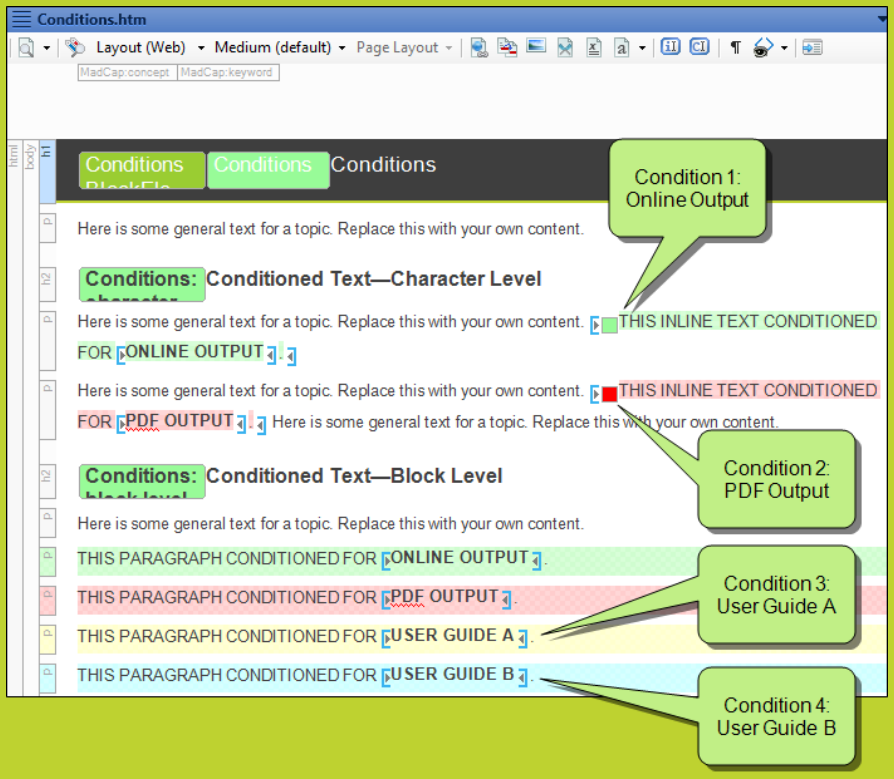
      - **Target Settings** The easiest method is to click the **Target Expressions** drop-down and select a target in your project. The dialog is automatically populated based on the included and excluded conditions in that target.

      - **Manual** You can also complete this dialog manually. You can use the same steps that are used in the target for including and excluding certain condition tags.

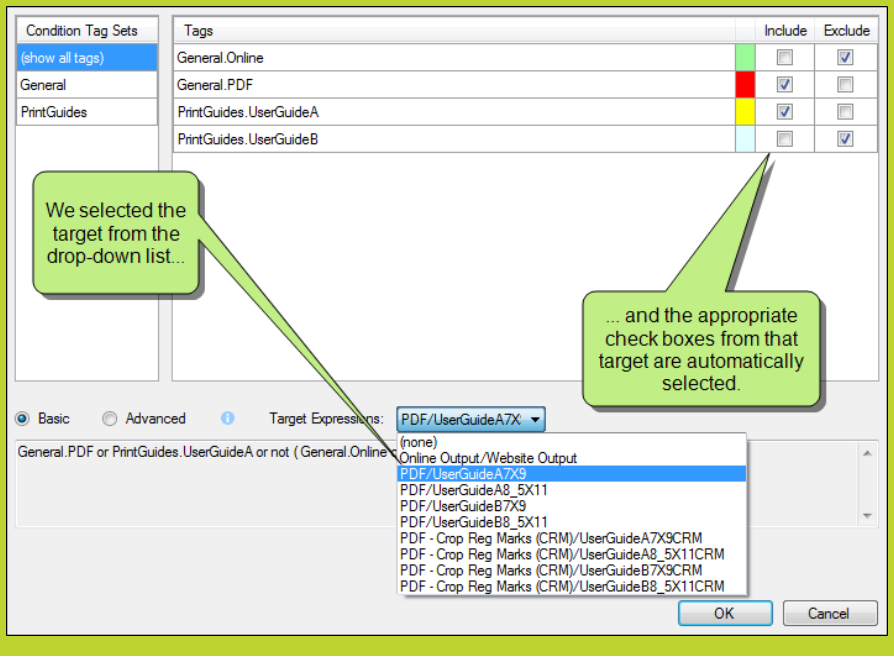
   c. When you are finished, click **OK**.

E X A M P L E

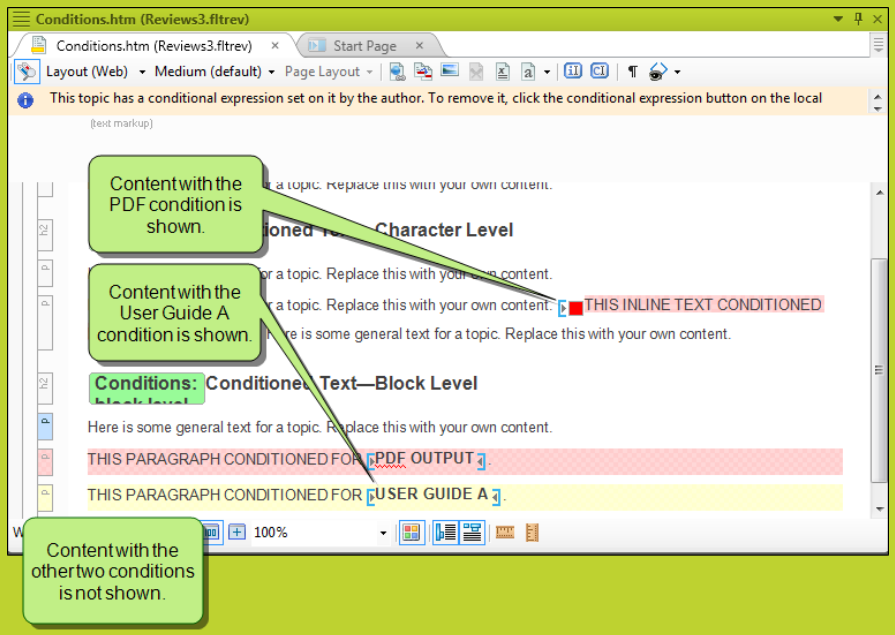
Let's say you have a topic that looks like this, with four different conditions applied to content:

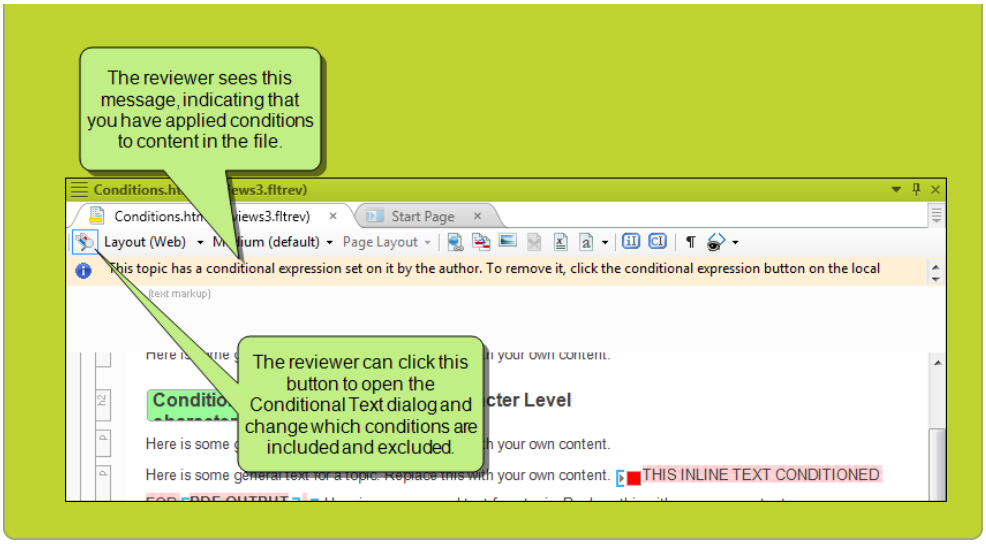


In the Conditional Text dialog accessed from the Send Files For Review Wizard, you select **Target Expressions** and choose **PDF/UserGuideA7X9**.



When the reviewer opens the file, this is what is shown:





7. (Optional) If you want to save a copy of the review package, click **Save**. Then find and select a folder to store it in and click **Save** again. You might use this option, for example, if you want to place the package in a SharePoint or external resources folder where others can access it, instead of using the email method. If you use this feature, you do not need to complete the rest of the steps.
8. Click **Next**.
9. (Optional) On the next page of the wizard, you can click in the **Subject** field and edit the default text that will be shown in the Subject field of the email sent to the reviewers.
10. (Optional) Enter or select a message that will be shown in the main body of the email sent to the reviewers.
    - You can click in the **Message** area and edit or replace the default text.

      OR
    - You can select a saved message from the drop-down list above the Message field.

      About the Saved Message Option The save option is useful if you repeatedly use the same email message text when sending files for review. Instead of retyping the same message each time you go through the wizard, you can click to type a new message, and then you can save it. After the message has been saved, you can select it from the drop-down list above the Message field. If you want to rename an email message, click .

11. If you do not have an email address in the list, click Add Email Recipient... . Complete the fields in the New Address Book Entry dialog and click **Add**. Do this for each email recipient.
12. Once email addresses have been added to the list, click the **Send** check box next to the addresses that you want to include in the email.
13. Click **Send**. A message in Microsoft Outlook opens with the package file attached.

> **Note:** The feature to open Microsoft Outlook and insert a review package works with 32-bit versions of Microsoft Office only, not 64 bit. If you are on a 64-bit system, you can save the review package and drag it into an Outlook email message.

14. Send the email.

> **Note:** If Microsoft Outlook is not installed or an Exchange server cannot be found, you will be prompted to save the review file and send it manually.

> **Note:** If you send out review packages and then move or rename the project, you will receive an error stating that the package does not belong to the project when you attempt to import those review packages. That's because Flare looks for the path of the project. Therefore, in order for it to function correctly, you need to return the project to the original path and name.

Viewing Reviewed Files in the Inbox

After an individual returns a package file that you have sent for review, you can bring that FLTREV file into your Flare project. Once the reviewed file is inside your project, you can view and accept it.

HOW TO VIEW REVIEWED FILES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Packages** section select **File Reviews**.

     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 or **Review>File Reviews**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.

   The File Reviews window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Inbox**. All reviewed files that you have brought into your project, but have not yet been accepted, are listed in the pane.

From the File Reviews window pane, you can select a file in the list and click any of the following buttons in the local toolbar to take action on it.

	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens a reviewed topic in the Reviewed Topic Editor or a snippet in the Reviewed Snippet Editor.
	Opens the source topic in the XML Editor.
	Lets you accept the reviewed topic. After accepting the file, it is converted to an HTM file (just like your regular content files) and overwrites the source file in your project. Any edits or annotations (i.e., comments) in the reviewed file therefore become part of the original file. See "Accepting Reviewed Files" on page 29.

Opens a dialog that lets you import reviewed files into the Inbox of the File Reviews window pane. See "Importing Reviewed Files" on page 34.

Accepting Reviewed Files

After an individual returns a package that you have sent them for review, you can bring that FLTREV file into your Flare project. Once the reviewed files (i.e., topics and snippets) within that package are inside your project, you can view and accept them. After accepting a file, it is converted to an HTM file (just like your regular files) and overwrites the source file in your project. Any edits or annotations (comments) in the reviewed file therefore become part of the original file.

HOW TO ACCEPT REVIEWED FILES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Packages** section select **File Reviews**.
   - **Menu** Select or **Review>File Reviews**.
   - **Review toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.

   The File Reviews window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Inbox**. All reviewed files that you have brought into your project, but have not yet been accepted, are listed in the pane.
3. In the list, select the file that you want to accept.
4. In the local toolbar, click . A message opens (if there are unresolved changes), indicating that the unresolved changes will be accepted if the file is accepted. However, if a conflict exists (e.g., the original file in your project changed since the time you sent it out for review), a dialog opens to let you know of the issue. You can then take the appropriate action; you can merge the changes from the files, keep the edits from the reviewer (undoing your changes), or keep your edits (discarding those from the reviewer). See "Merging Reviewed Files" on the next page.
5. Click **OK**. The reviewed file replaces the source file in the project. Also, the file is removed from the File Reviews window pane.

Merging Reviewed Files

If you attempt to accept a reviewed file and Flare detects a conflict, a dialog opens so that you can take the appropriate action.

E X A M P L E

Let's say you send a file to a reviewer. Before the reviewer returns the file, you make changes to the original file in your project. Then you receive the reviewed file and attempt to accept it so that it becomes part of your project. Flare detects a conflict because the original has changed, so you are given a few options. You can merge the changes from the files, keep the edits from the reviewer (undoing your changes), or keep your edits (discarding those from the reviewer).

HOW TO MERGE REVIEWED FILES

1. Go through the process of accepting a reviewed file (see "Accepting Reviewed Files" on the previous page). If a conflict exists, a dialog opens.
2. In this dialog, you can choose from the following options and click **OK**.
   - **Merge changes in merge tool** Opens a merging interface, which lets you see exactly what changes were made and choose which to keep.
   - **Undo my local changes** Removes your changes and keeps changes from the reviewer.
   - **Discard reviewer changes** Removes changes from the reviewer and keeps your changes.

   If you selected the first option, the Merge Changes dialog opens, showing the original (local) file on one side and the reviewed file on the other side, with changes shown in different colors.
3. (Optional) If you want to change the colors associated with the changes, you can click **Options**.
4. (Optional) By default the files are shown in a WYSIWYG (What You See Is What You Get) view. But you can click **Merge as Text** to work in the markup instead; you can left-click to resolve conflicts (accept changes) when merging as text.
5. You can use the Merge Changes dialog to view and select changes. You can take actions in the following ways.
   - **Right-Click Icon** You can right-click on the icon next to a change on either the local or reviewed side. This displays a context menu, which lets you either keep or ignore a particular change.
   - **Left-Click Icon** You can left-click on the icon next to a change on either the local or reviewed side. When you do this, the change from one side is kept and the change from the other side is ignored. If you left-click the icon again, the results are toggled; the first change is ignored and the other is kept.
   - **Type Content** If you want to use your changes as well as those from the reviewer, and even tweak the paragraph a bit more, you can click in the area at the bottom of the dialog and simply type content.

» **Previous/Next Conflict** When you are finished resolving the first conflict, you can use the "Previous Conflict" and "Next Conflict" buttons at the bottom of the dialog to work on other conflicts in the topic.

6. After all conflicts have been resolved, click **OK**.

   A backup of the original file is added to the Backups window pane. This allows you to restore that file if you do not want to keep the merged version.

ICONS FOR FILE DIFFERENCES

Following are descriptions of the various icons you might see in the Merge Changes dialog when merging files.

Icon	Description
	Changed Content This indicates that the content has changed but there is no conflict. Therefore, no action is needed.
	Changed Tag This is the same as the "Changed Content" icon, except the content has not changed, just a tag, such as a style or span.
	New Content This indicates that there is new content, but there is no conflict with your changes. Therefore, no action is needed.
	Deleted This indicates that content was deleted, but there is no conflict with your changes. Therefore, no action is needed.

Following are descriptions of conflict icons.

Conflict Icon	Description
	Changed Content—Conflict This indicates that the content has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.
	Conflict Change—Accepted This indicates that a change with a conflict has been accepted after clicking on . The bottom pane of the Merge Changes dialog updates to show the accepted content.
	Conflict Change—Not Accepted This indicates that a change with a conflict will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays , the opposite pane where the conflict exists will display .

Conflict Icon	Description
	Changed Tag—Conflict This indicates that the tag has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.
	Conflict Tag—Accepted This indicates that a change with a conflict in a tag has been accepted after clicking on . The bottom pane of the Merge Changes dialog updates to show the accepted content.
	Conflict Tag—Not Accepted This indicates that a change with a conflict in a tag will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays , the opposite pane where the conflict exists will display .

Viewing Files Sent for Review

You can view a list of all files that you have sent to others for review. If you double-click a file from the list in the File Reviews window pane, it opens in the XML Editor.

HOW TO VIEW FILES SENT FOR REVIEW

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Packages** section select **File Reviews**.
   - **Menu** Select or **Review>File Reviews**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.

   The File Reviews window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Sent Files**.

From the File Reviews window pane, you can select a file in the list and click one of the buttons in the local toolbar to take action on it.

	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens the file in the XML Editor.

Importing Reviewed Files

You can import reviewed files (topics and snippets) into the inbox of the File Reviews window pane. After that, you can view and/or accept the file. You might use this feature, for example, if you have received a file from a reviewer, but rather than immediately sending the file to your inbox from the email message, you saved it to your local drive.

HOW TO IMPORT REVIEWED FILES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Packages** section select **Import Review Package**.
   - **Menu** Select or **Review>Import Review Package**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.
2. Navigate to the reviewed package (FLTREV file) and double-click it.
3. In the message that opens, click **Yes** if you want to immediately view the file, or click **No** if you do not want to open it. The file is added to your inbox.

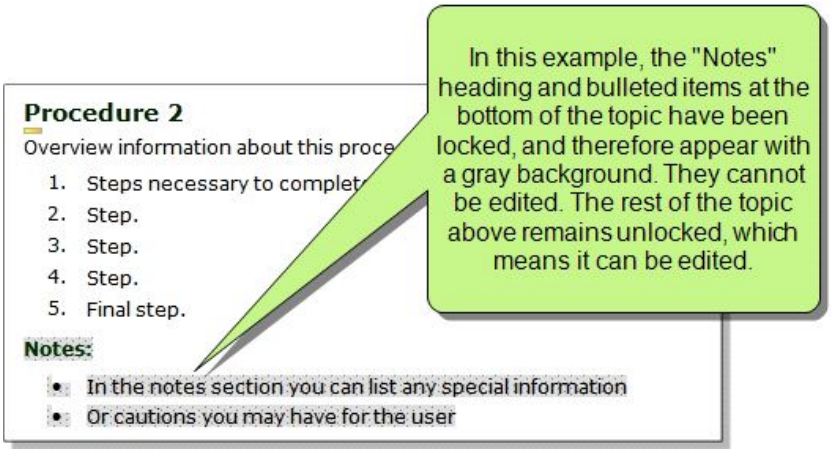
Note: If you send out review packages and then move or rename the project, you will receive an error stating that the package does not belong to the project when you attempt to import those review packages. That's because Flare looks for the path of the project. Therefore, in order for it to function correctly, you need to return the project to the original path and name.

After you import a reviewed file, you can accept it, making the file part of your project. See "Accepting Reviewed Files" on page 29.

Locking Elements

You can lock areas within topics, such as paragraphs, so that they cannot be edited. You might take advantage of this feature, for example, when you are using Flare's file review and contributions process. If you want a reviewer to see portions of a file, but you do not want that individual to alter them, you can lock those parts. After the file is returned, you can unlock those areas of the file. See "Unlocking Elements" on page 37.

When you mark areas in a file to be locked, the background of that area turns gray. However, you can turn this background on or off, depending on whether you want to see it when working on the file.



HOW TO LOCK ELEMENTS

1. Open the content file (e.g., topic, snippet).
2. Place your cursor on a paragraph that you want to lock, or highlight multiple paragraphs.

   Note: Only entire blocks of content or paragraphs can be locked, not portions of paragraphs.

3. Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Select the **Review** ribbon. Select **Lock>Lock** to add a check mark.
   - **Menu** Select **Format>Locks>Mark Element(s) to be Locked**.

   The paragraphs display a gray background, which will not show up in the output.

   If you want to hide this shading from the XML Editor, but still keep the locks on the paragraphs, select **Review>Lock>Show Locked Elements** (in the ribbon view). You can also click the down arrow next to the **Show tags** button in the XML Editor. Then select **Show Locked Elements**.

   Notice that you can still click in the paragraphs and edit the text. That is because the elements have only been marked for locking, but they have not yet been locked.

4. Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Select the **Review** ribbon. Select **Lock>Enable Locks** to add a check mark.
   - **Menu** Select **Format>Locks>Locks (Disabled)** to enable the locks.

   The paragraphs marked for locking are now locked, and you cannot edit the text within them.

5. Click to save your work.

Note: Annotations, which are used in the file review process, cannot be added to areas of a file that have been locked.

Note: This feature is to be used for locking areas of a file, not the file itself.

Unlocking Elements

After locking elements of a paragraph, you can unlock them when you are ready to edit the text again. See "Locking Elements" on page 35.

HOW TO UNLOCK ELEMENTS

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 **Review** ribbon. Select **Lock>Enable Locks** to remove the check mark.
   - **Menu** Select **Format>Locks>Locks (Enabled)** to disable the locks.

   The elements are now unlocked and you can edit them. However, the paragraphs continue to be "marked for locking," meaning they can be easily be locked again by selecting this option again.
3. (Optional) If you want to remove the "marks" on paragraphs that prepare them for locking, place your cursor on the paragraph or highlight multiple paragraphs. Then do one of the following, depending on the part of the user interface you are using.
   - **Ribbon** Select the **Review** ribbon. Select **Lock>Lock** to remove the check mark.
   - **Menu** Select **Format>Locks>Unlocked Element(s)**.
4. Click to save your work.

CHAPTER 3

Reviews—Receiving from Others

Using Flare, you can review documents sent to you by other Flare authors.

HOW TO REVIEW DOCUMENTS

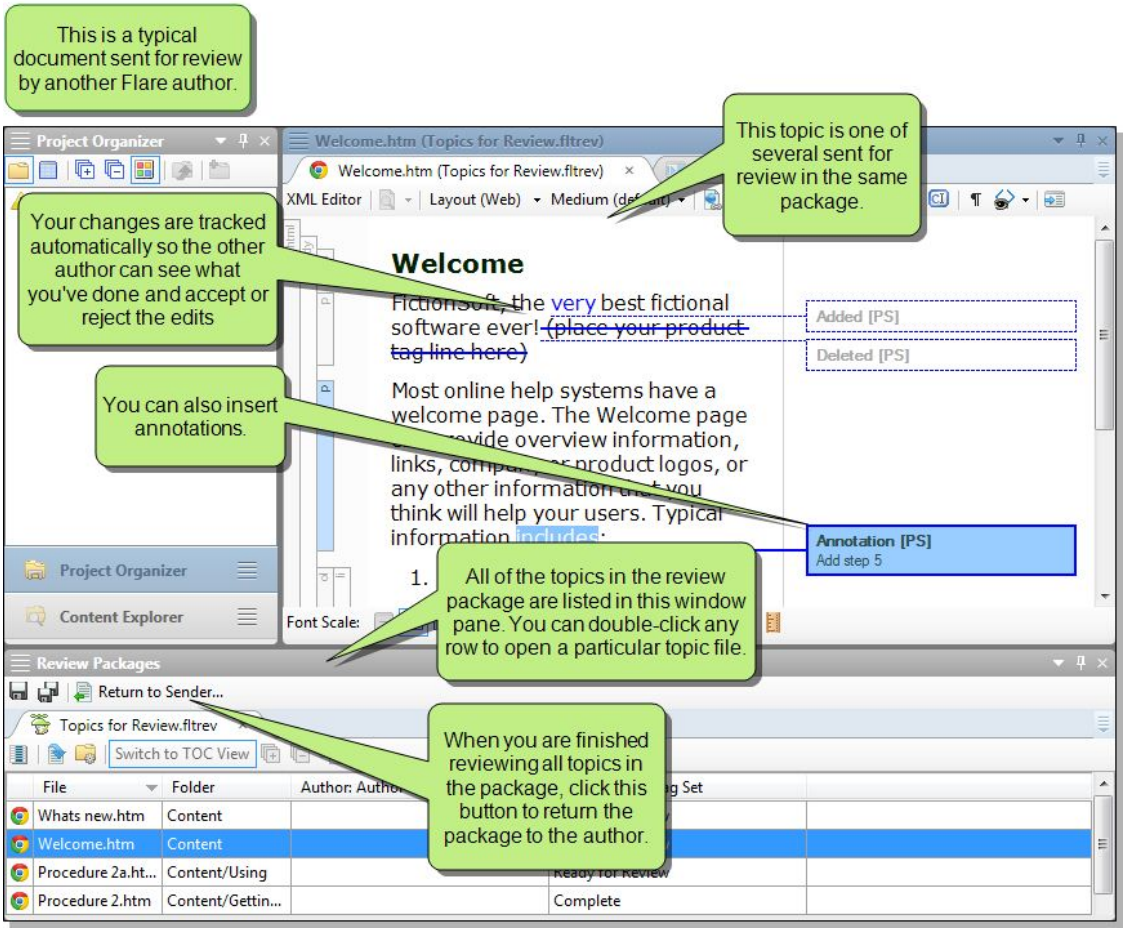
1. **Open** You can open the review package file (from your email, from SharePoint, or from an external resource folder). In the dialog that opens, select **Open the package in Flare for review**, and click **OK**. Flare launches and the files in the review package are listed in the Review Packages window pane. Double-click a row to review and edit a particular file.

   If the review package contains topics as well as snippet files, you can open the snippets too. You can open snippets this by double-clicking them in the Review Packages window pane. Another approach is to right-click the snippet where it is inserted in a topic (or in another snippet) and from the context menu select **Open Link**.

2. **Edit** You can edit the content in Flare, and your changes are tracked automatically. Also, if the file you received already had tracked changes in it, you can accept or reject those changes. After you return the review package, the other author can see your changes and accept or reject them.

3. **(Optional) Insert Comments** You can insert annotations (comments) that are associated with specific areas of text in the document. These annotations do not become part of the content within the document, but rather are intended for internal use between you and others. (Do not select more than one paragraph or click at the very end of paragraphs; otherwise, the "Insert Annotation" option will not be enabled.) See "Inserting Annotations" on page 54.

4. **Return** You can return the review package to the author via email, or by using SharePoint Integration or the external resources feature.



HOW TO RETURN DOCUMENTS TO AUTHORS

1. Open the review package containing the documents you reviewed. If you do not see the Review Packages window pane select **Review>Review Packages**.
2. In the local toolbar of the Review Packages window pane, click Return to Sender...
3. In the email message, click **Send**.

Note: As an alternative to the email method, you can use SharePoint integration or the external resources feature to save the file in a location where the author can access it. If you use either of these features to return documents to authors, you will have to notify them manually through email or other means. For more information see the online Help.

CHAPTER 4

Contributions

Authors, developers, or other individuals in your company can use Contributor to create new documents and files, which can be incorporated into your Flare project. These documents can also be exported to PDF, XPS, and XHTML outputs.

This chapter discusses the following:

Creating and Sending Contribution Templates 44
Sending Contribution Templates 47
Viewing Contribution Files 48
Accepting Contribution Files 49
Viewing Contribution Templates 50
Importing Contribution Files 51

Creating and Sending Contribution Templates

In order to accommodate and assist the contribution process, you can create contribution templates for other individuals to use. These templates are topic files that can be crafted to already have certain pieces in place (e.g., text, formatting, locked regions) and make certain ancillary files available (e.g., variables, condition tags, stylesheets) to the contributor. After using the template to create a new document in Contributor, the contributor can send it to you, and you can then make the document part of your project.

HOW TO CREATE AND SEND CONTRIBUTION TEMPLATES

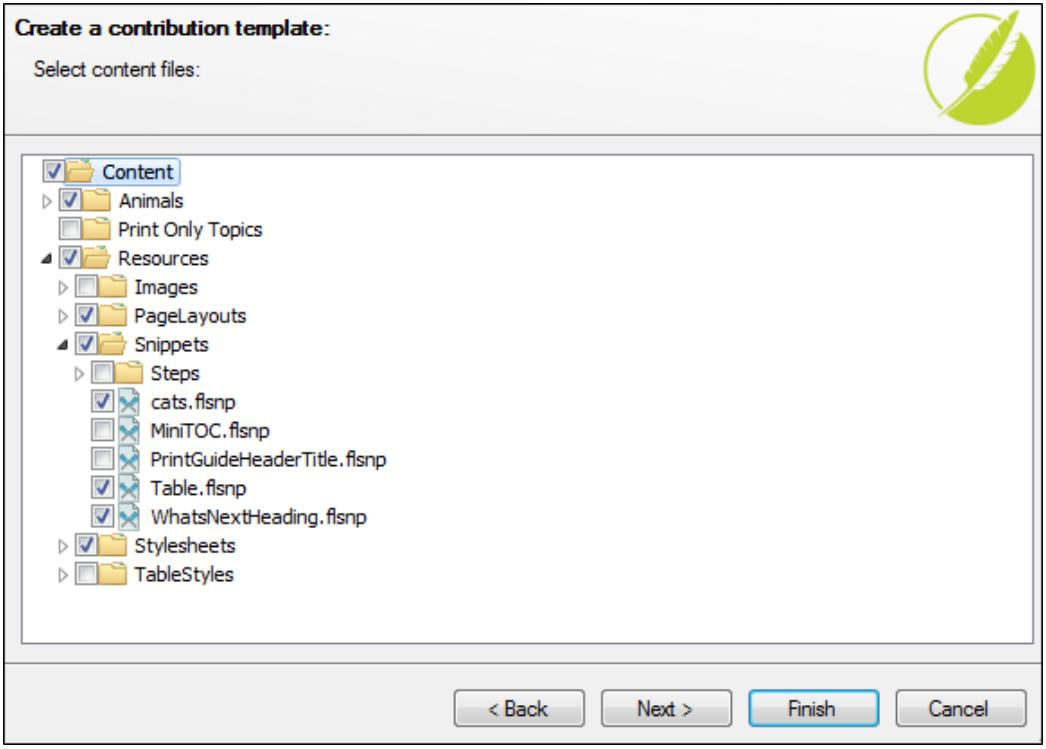
1. Create a topic or open an existing one, and add any content that you want to be part of the ready-made template for contributors (e.g., text, images).
2. (Optional) If there are parts of the topic that you do not want contributors to modify, apply locks to those areas. See "Locking Elements" on page 35.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **File>Save>Save As Contribution Template**.
   - **Menu** Select **Tools>Contributions>Create Contribution Template**.

   The Save Topic as Contribution Template Wizard opens.
4. In the **Template Name** field, enter a name for the new template.
5. (Optional) Click ... and select a location to store a copy of the new template file, which uses an .mccot extension.

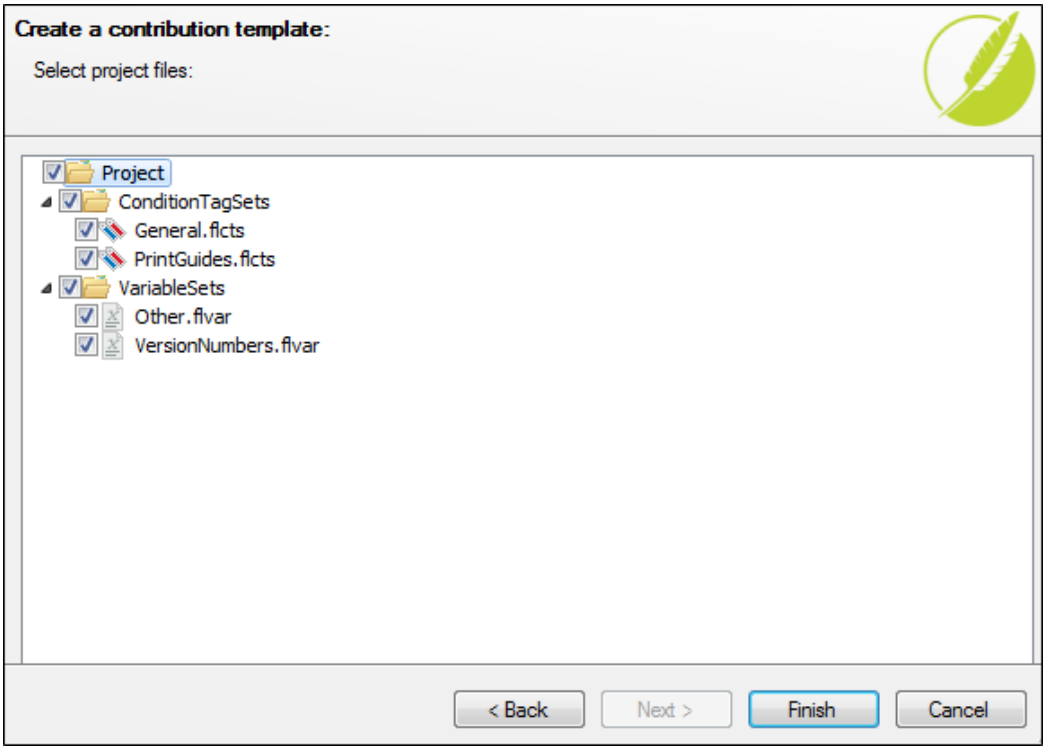
   The default location is Documents/My Contribution Templates. This is the location used if you do not select one.

   Note: In some operating systems, the folder is called "My Documents" instead of "Documents."

6. Click **Next**. All of the content support folders and files are shown, and those that are relevant to the topic are already selected. For example, if the topic has an image and a table using a special table stylsheet, those files are selected in the wizard so that they can be included in the template package. If those support files were not included, the contributor would not be able to see the topic in the same way that you are able to. You can also click other check boxes to include additional files if you like. However, you cannot add other topic files.



7. Click **Next**. This is just like the previous page, except it shows project folders and files, with relevant ones already selected. You can click other check boxes to include additional files if you like.



8. Click **Finish**. The Template Created dialog opens.
9. If you want to immediately send the new template to a contributor, click **Yes**. A new email message is automatically created with the template file attached.
10. Send the email.

After contributors make changes to the file and return it, you can double-click on the MCCO file that they send, bring it into your project, and accept it, thus making it part of your project. See "Viewing Contribution Files" on page 48 and "Accepting Contribution Files" on page 49.

Sending Contribution Templates

In order to accommodate and assist the contribution process, you can create contribution templates for other individuals to use. These templates are topic files that can be crafted to already have certain pieces in place (e.g., text, formatting, locked regions) and make certain ancillary files available (e.g., variables, condition tags, stylesheets) to the contributor. After using the template to create a new document in Contributor, the contributor can send it to you, and you can then make the document part of your project.

Use the following steps to send a contribution template that you have already created. If you have not yet created the template, see "Creating and Sending Contribution Templates" on page 44.

HOW TO SEND CONTRIBUTION TEMPLATES

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

   The Contributions window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Templates**. All contribution templates that you have created are listed in the pane.
3. Click on the template that you want to send.
4. In the local toolbar click Send... . The Send Contribution Template dialog opens.
5. (Optional) You can click in the **Message** area and edit the default text that will be shown in the main body of the email sent to the contributors.
6. If you do not have an email address in the list, click Add Email Recipient... . Complete the fields in the New Address Book Entry dialog and click **Add**.
7. Once an email address is added to the list, click the **Send** check box next to the addresses that you want to include in the email.
8. Click **Send**.
9. Send the email.

After contributors make changes to the file and return it, you can double-click on the MCCO file that they send, bring it into your project, and accept it, thus making it part of your project. See "Viewing Contribution Files" on the next page and "Accepting Contribution Files" on page 49.

Viewing Contribution Files

After an individual emails you an MCCO contribution topic (or places it in a SharePoint or external resources folder), you can bring it into your Flare project, where you can view and accept it. After accepting the topic, it is converted to an HTM file (XML-based, just like your regular topics) and added to your project.

HOW TO VIEW CONTRIBUTION FILES

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

   The Contributions window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Contributions**. All contributed topics that you have brought into your project, but have not yet been accepted, are listed in the pane.

From the Contributions window pane, you can select a document in the list and click any of the following buttons in the local toolbar to take action on it.

	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens the contribution topic (MCCO file) in the Incoming Topic Editor.
	Imports a contribution template.
Accept Topic...	Lets you accept the contribution topic. See "Accepting Contribution Files" on the following page.

Accepting Contribution Files

After an individual emails you an MCCO contribution topic (or places it in a SharePoint or external resources folder), you can bring it into your Flare project, where you can view and accept it. After accepting the topic, it is converted to an HTM file (XML-based, just like your regular topics) and added to your project.

HOW TO ACCEPT CONTRIBUTION FILES

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

   The Contributions window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Contributions**. All contributed topics that you have brought into your project, but have not yet been accepted, are listed in the pane.
3. In the list, select the topic that you want to accept.
4. In the local toolbar, click Accept Topic... . The Accept Contribution Wizard opens.
5. (Optional) In the **File Name** field, you can use the name that the contributor provided, or you can rename it.
6. In the **Select Folder** section, find and select a folder in the Content Explorer where you want to place the new topic.
7. Click **Next**.
8. Flare checks for conflicts between the contribution resource files and the project's resource files (e.g., images, videos, stylesheets). If conflicts are found, you will see a series of pages (depending on the number of conflicts) that allow you to fix the issues. Select either **Use Contribution Resource** or **Use Existing File**, depending on which file you want to keep.
9. Click **Next**.
10. (Optional) When all conflicts have been resolved, or if there were none, the resource files associated with the contribution file are listed. If you want to change the name or location of a particular resource file, select it in the list. Then change the text in the **File Name** field and/or click ... to select a new path in the project. It is recommended that you leave the default path.
11. (Optional) If you want to see a preview of the imported file, click **Next**.
12. Click **Finish**.
13. Click **OK**.
14. You will be asked if you want to recycle the contribution file. Click **Yes** if you do not want to keep a copy of the contribution document; the file will be deleted from your project. Click **No** if you want to keep a copy of that document.

Viewing Contribution Templates

You can quickly see a list of all contribution templates that you have created. From the list, you can open any of the templates or send them to contributors so that they can use them when creating documents in Contributor.

HOW TO VIEW CONTRIBUTION TEMPLATES

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

   The Contributions window pane opens.
2. Click in the drop-down field at the top of the window pane, select **Templates**. All contribution templates that you have created are listed in the pane.

From the Contributions window pane, you can select a template in the list and click any of the following buttons in the local toolbar to take action on it

	Refreshes the window pane so that the latest information is shown.
	Deletes the selection.
	Opens the contribution template (MCCOT file) in the Topic Template Editor.
Send...	Opens the Send Contribution Template dialog, which lets you send the template to your contributors. See "Sending Contribution Templates" on page 47.

Importing Contribution Files

Normally, an individual will email you an MCCO contribution topic. You can then open the file directly in the email message, bringing it into your Flare project, where you can view and accept it. Another option is to import a contribution file. You might use this option if an individual has simply placed the file somewhere on your network, instead of emailing it to you. Of you might use it if you simply saved a contribution file to your local drive instead of immediately bringing it into your project.

HOW TO IMPORT CONTRIBUTION FILES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Resources** section select **Contributions**. Then in the local toolbar of the Contributions window pane, click .
   - **Menu** Select **Tools>Contributions>Import Contribution Document**.

   The Import Contribution File dialog opens.
2. Navigate to the MCCO file and double-click it. The file opens in the interface in the Incoming Topic Editor.

From the Incoming Topic Editor, you can make the imported file a part of your project by clicking Accept Topic... in the local toolbar. After you complete this step, the file is added to your Content Explorer.

CHAPTER 5

Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use.

You can insert an annotation (comment) into a document. These annotations do not become part of the actual content, but rather are intended for internal use between you and others.

This chapter discusses the following:

Inserting Annotations 54
Editing Annotations 56
Hiding and Showing Changes and Annotations 57
Viewing Files with Annotations 58
Deleting Annotations 59
Changing the User Color for Reviews 60
Changing Your User Name and Initials 62
Finding Changes 63

Inserting Annotations

Following are steps for inserting annotations.

HOW TO INSERT AN ANNOTATION

1. Open the content file (e.g., topic, snippet).
2. Highlight the content that you want to associate with the annotation, or place your cursor on it.

   Note: Do not highlight more than one paragraph. Also, avoid placing the cursor at the very end of a paragraph that ends with a punctuation mark or special character; otherwise, the "Insert Annotation" option will not be enabled.

3. Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Select the **Review** ribbon. In the **Annotations** section select **Insert Annotation**.

     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 **Review>Insert Annotation**.

   - **Review Toolbar** Click .

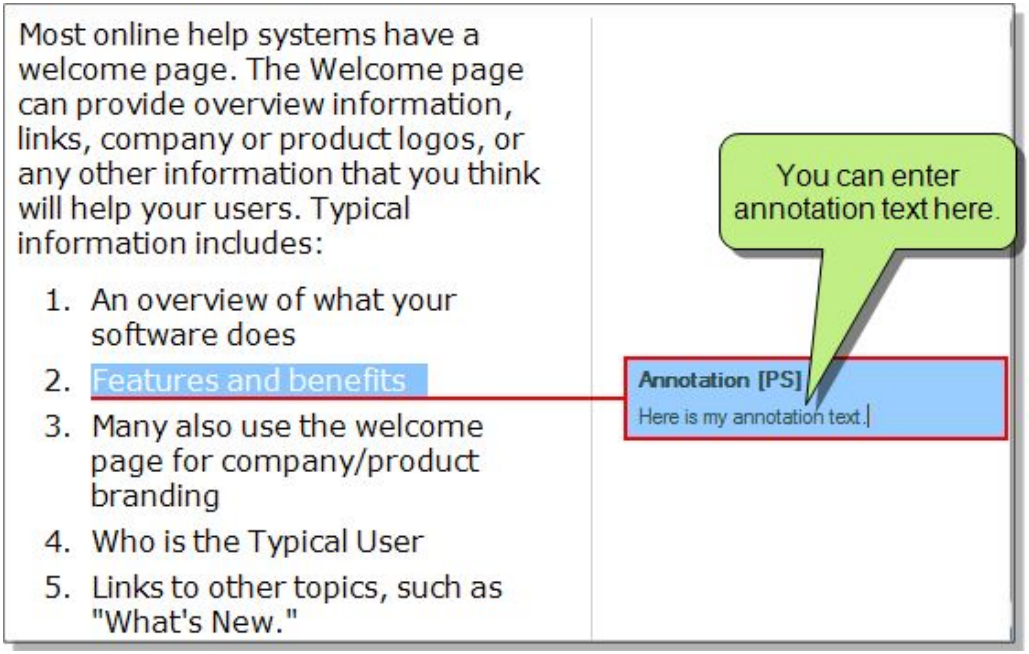
     To open the Review from the menu view, select **View>Toolbars>Review**.

   - **Right-Click** If the track changes feature is enabled, you can right-click and select **Insert Annotation**.

     A rectangle extends to a sidebar on the right, with a line pointing to the selected content. This rectangle will hold the annotation text after you type it.

     Also, the selected content is shaded, indicating that the annotation refers to that text. However, the shading will not be displayed in the output; it is for internal use only.

4. Type your comment in the annotation rectangle.



5. Click to save your work.

Note: When you insert an annotation, your initials are displayed next to it. The initials are the first two letters of your login user name. However, you can change the user name and initials (for use in Flare) to something else. For more information see the online Help.

Editing Annotations

You and other individuals can insert comments and notes next to content in a topic. Annotations do not become part of the actual content; they are simply comments for your internal use.

You can easily make changes to an annotation.

HOW TO EDIT ANNOTATIONS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Changes** section select **Show Changes**.
   - **Menu** Select **Review>Show Changes**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.
2. Click in the rectangle containing the annotation text and make your changes.
3. Click to save your work.

Hiding and Showing Changes and Annotations

You can hide or show tracked changes and annotations in the active document.

HOW TO HIDE AND SHOW CHANGES AND ANNOTATIONS

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 **Review** ribbon. In the **Changes** section select **Show Changes**.
   - **Menu** Select **Review>Show Changes**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.

Viewing Files with Annotations

You can view a list of all files where annotations (internal comments) have been inserted. You can also double-click a row to open the topic in question.

HOW TO VIEW FILES WITH ANNOTATIONS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Analysis** section select **Project Analysis>Files With Annotations**.
   - **Menu** Select **View>Project Analysis>Files With Annotations**.

   The Project Analysis window pane opens, with the "Files With Annotations" option selected from the drop-down menu at the top. The area at the bottom of the window pane displays all topics in your project where annotations have been inserted.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider:
   - **File** Displays the name of the file.
   - **Title** Displays the properties title of the file (if any).
   - **Folder** Displays the folder where the file is found.
   - **Text** Displays the annotation text.
   - **Initials** Displays the initials of the individual who inserted the annotation.
   - **Creator** Displays the user name of the individual who create the annotation.
   - **Editor** Displays the user name of the individual who last edited the annotation.
   - **Create Date** Displays the date and time when the annotation was created.
   - **Edit Date** Displays the date and time when the annotation was last edited.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items.
4. You can double-click any topic in the list to view or modify it.

Deleting Annotations

You can delete annotations that have been inserted into a content file (e.g., topic, snippet) .

HOW TO DELETE ANNOTATIONS

1. Open the content file (e.g., topic, snippet).
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 57.
3. Do one of the following, depending on the part of the user interface you are using:

   DELETE ALL ANNOTATIONS IN THE DOCUMENT

   - **Ribbon**
     a. Select the **Review** ribbon. In the **Annotations** section select **Delete Annotation>Delete All Annotations**.
     b. Click **Yes**.
   - **Menu**
     a. Select **Review>Delete All Annotations**.
     b. Click **Yes**.

   DELETE A SINGLE ANNOTATION

   - **Ribbon**
     a. Select the **Review** ribbon. In the **Annotations** section select **Delete Annotation**.
     b. Click **Yes**.
   - **Menu**
     a. Select **Review>Delete Annotation**.
     b. Click **Yes**.
   - **Right-Click**
     - Right-click on the annotation you want to delete, and from the context menu, select **Delete Annotation**.
4. Click to save your work.

Changing the User Color for Reviews

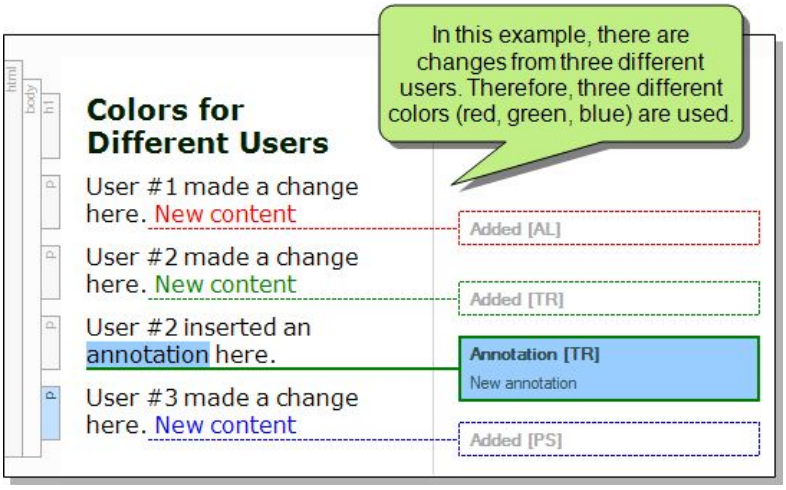
The tracked changes and annotations for each user can be shown in a separate color. You also have the option of choosing a specific color for all users.

HOW TO CHANGE THE USER COLOR FOR REVIEWS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Options** section select **Review Options**.
   - **Menu** Select **Tools>Options**. Then in the Options dialog select the **Review** tab.
2. In the **User Colors** section, choose one of the following.

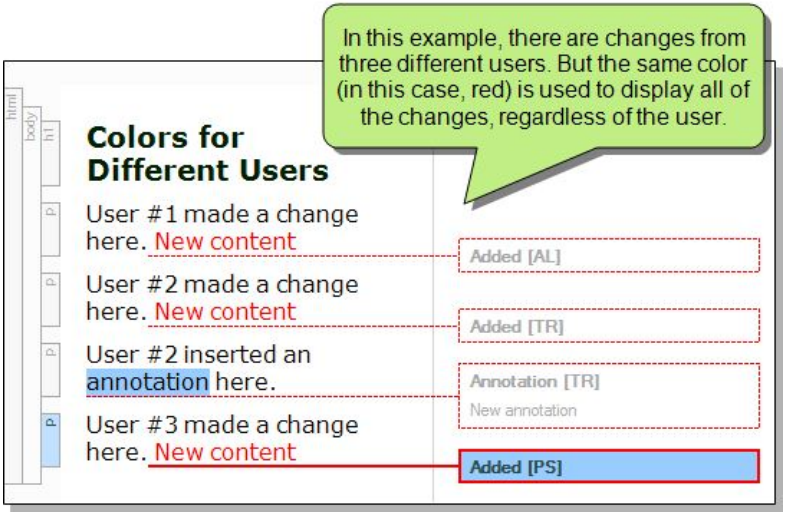
   USE A DIFFERENT COLOR FOR EACH USER

   Select this option if you want Flare to automatically assign a different color for each user.



USE THE FOLLOWING COLOR FOR ALL USERS

Select this option if you want all changes, regardless of the user, to display in the same color. After you choose this option, click the down arrow below to select a color.



3. Click **OK**.

Changing Your User Name and Initials

When you first install and launch Flare, your login user name is captured and stored in the Options dialog. The first two letters of the user name are also stored as your initials. This information is employed whenever you use the track changes and annotations features. For example, if you insert an annotation in a topic, your initials are displayed at the beginning of the comment so that other users know where the annotation came from.

You can always change your Flare user name or initials to something else.

E X A M P L E

Let's say your login user name is "johndoe." In that case, your initials are stored automatically as "jo." Although you want to keep your user name as is, you want to change the initials to "jd," which other users will more readily associate with you. Therefore, you open the Options dialog and use the Review tab to change only your initials.

HOW TO CHANGE THE USER NAME AND INITIALS FOR REVIEWS

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Options** section select **Review Options**.
   - **Menu** Select **Tools>Options**. Then in the Options dialog select the **Review** tab.
2. Change the text in either the **User Name** or **Initials** fields.
3. Click **OK**.

Finding Changes

You can use navigation buttons in the Review ribbon to quickly navigate to the previous or next tracked change or annotation in the file.

HOW TO FIND CHANGES

1. Open the content file (e.g., topic, snippet).
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 57.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Changes** section select **Next Change** or **Previous Change**.
   - **Menu** Select **Review>Next Change** or **Review>Previous Change**.
   - **Review Toolbar** Click to highlight the next change. To move to the previous change, click .

     To open the Review from the menu view, select **View>Toolbars>Review**.

CHAPTER 6

Tracking Changes

You can track changes made to content files edited in the XML Editor (topics, snippets, master pages) and accept or reject those alterations individually. Each change is marked in a color (different colors for different users) and/or labeled in a sidebar.

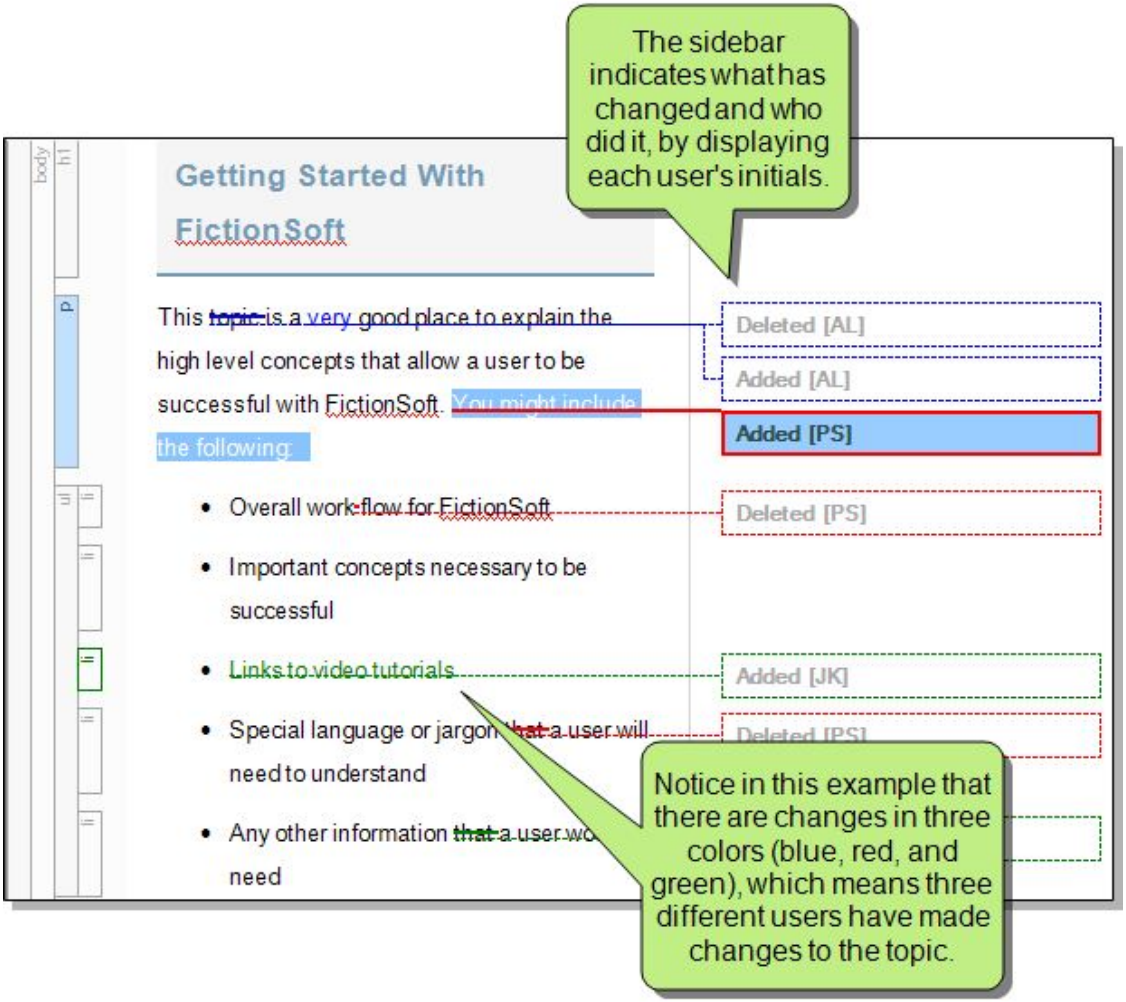
When this feature is enabled, every change to the document—along with the user who performed the change—will be stored in the document's markup. For example, deleted text won't actually be removed from the document, but will instead be marked as deleted in the code. However, if the change is accepted, the text will be removed from the document at that point.

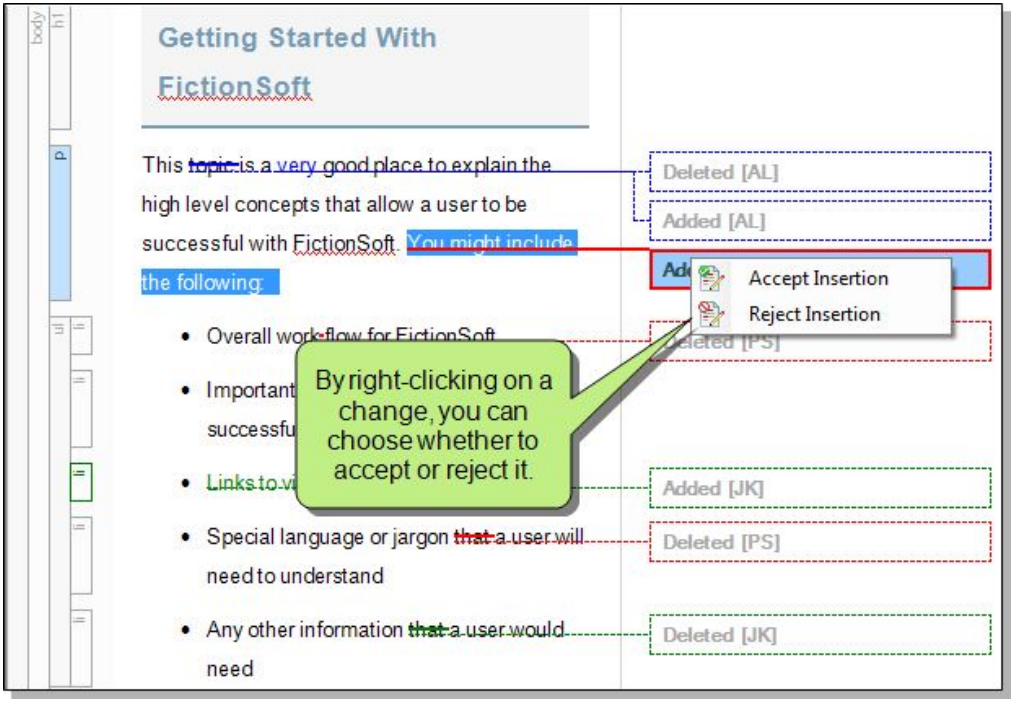
This chapter discusses the following:

Examples 66
Review Workflow 68
Enabling Track Changes 69
Accepting or Rejecting Tracked Changes 70
Changing the Display of Tracked Changes 72
Viewing Files with Changes 74

Examples

The following images show how tracked changes work in Flare.




Getting Started With FictionSoft
This topic is a very good place to explain the high level concepts that allow a user to be successful with FictionSoft. You might include the following:
Overall workflow for FictionSoft
Important
successfu
Links to vi
Special language or jargon that a user will need to understand
Any other information that a user would need
Deleted [AL]
Added [AL]
Accept Insertion
Reject Insertion
Deleted [PS]
Added [JK]
Deleted [PS]
Deleted [JK]
By right-clicking on a change, you can choose whether to accept or reject it.

Review Workflow

The track changes feature is especially useful as part of the file review process (when you send topics out for review to individuals who make changes to them). See "Sending Files for Review" on page 14.

When reviewers open files in Contributor to review them, the track changes feature is automatically enabled. Therefore, you can see exactly what the reviewer modified in the returned document. You can then pick and choose which edits to accept or reject. Also, if the file you sent for review already had tracked changes in it, the reviewer can accept or reject those changes.

Note: The track changes feature is intended only for self-contained operations within the XML Editor. For example, if you make changes to index keywords or concepts in the Index and Concept window panes (e.g., renaming, assigning them to topics), those modifications are not indicated as tracked changes because they are considered project-wide "link updating" processes.

Note: The track changes setting is not global in a project (i.e., it does not affect other content files open at that time). For example, let's say you have two topics open. With focus on topic A, you enable the track changes feature. If you bring focus to topic B, the track changes option is not enabled for that topic yet. However, if you then open other topics after that point, the track changes feature will be enabled in those topics.

Enabling Track Changes

If you want Flare to track your own edits as you make them, you must first enable the feature. When reviewers open topics in Contributor to review them, the track changes feature is automatically enabled. However, reviewers have the option of disabling the track changes feature, so it is imperative that you communicate with reviewers to establish your workflow, including whether changes should be tracked. Therefore, you can see exactly what the reviewer modified in the returned document. You can then pick and choose which edits to accept or reject. Also, if the topic you sent for review already had tracked changes in it, the reviewer can accept or reject those changes.

HOW TO ENABLE THE TRACK CHANGES FEATURE

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 **Review** ribbon. In the **Changes** section select **Track Changes**.

     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 **Review>Track Changes**.
   - **Review Toolbar** Click .

     To open the Review from the menu view, select **View>Toolbars>Review**.
   - **Keyboard Shortcut** Press **CTRL+SHIFT+E**.

Accepting or Rejecting Tracked Changes

You can right-click on tracked changes and use a context menu to accept or reject them individually. You can also use options in the interface to accept or reject each tracked change or all tracked changes in a file. The reject option also removes annotations.

When you track changes, every change to the document—along with the user who performed the change—will be stored in the document's markup. When a change is accepted or rejected, all markup designating it as a change is removed. When all changes in the document are resolved, the it will not contain any history of changes made to it and can be considered ready for output.

HOW TO ACCEPT OR REJECT TRACKED CHANGES

1. Open the content file (e.g., topic, snippet).
2. Make sure you have changes set to be displayed. See "Hiding and Showing Changes and Annotations" on page 57.
3. You can perform any of the following tasks.

   ACCEPT ALL CHANGES IN THE DOCUMENT

   Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Select the **Review** ribbon. In the **Changes** section select **Accept Change>Accept All Changes**.
   - **Menu** Select **Review>Accept All Changes**.
   - **Review Toolbar** Click the down arrow next to and select **Accept All Changes**.

     To open the Review from the menu view, select **View>Toolbars>Review**.

   ACCEPT SINGLE CHANGE

   Do one of the following, depending on the part of the user interface you are using:

   - **Ribbon** Click on the change you want to accept. Select the **Review** ribbon. In the **Changes** section select **Accept Change**.
   - **Menu** Click on the change you want to accept. Select or **Review>Accept Change**.
   - **Review Toolbar** Click on the change you want to accept. In the Review toolbar click .

     To open the Review from the menu view, select **View>Toolbars>Review**.
   - **Right-Click** Right-click on the change you want to accept. From the context menu, select **Accept [Type of Change]**.

REJECT ALL CHANGES IN THE DOCUMENT

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Select the **Review** ribbon. In the **Changes** section select **Reject Change>Reject All Changes**.
- **Menu** Select **Review>Reject All Changes**.
- **Review Toolbar** Click the down arrow next to and select **Reject All Changes**.

  To open the Review from the menu view, select **View>Toolbars>Review**.

REJECT SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click on the change you want to reject. Select the **Review** ribbon. In the **Changes** section select **Reject Change**.
- **Menu** Click on the change you want to reject. Select **Review>Reject Change**.
- **Review Toolbar** Click on the change you want to reject. In the Review toolbar click .

  To open the Review from the menu view, select **View>Toolbars>Review**.
- **Right-Click** Right-click on the change you want to reject. From the context menu, select **Reject [Type of Change]**.

4. Click to save your work.

Changing the Display of Tracked Changes

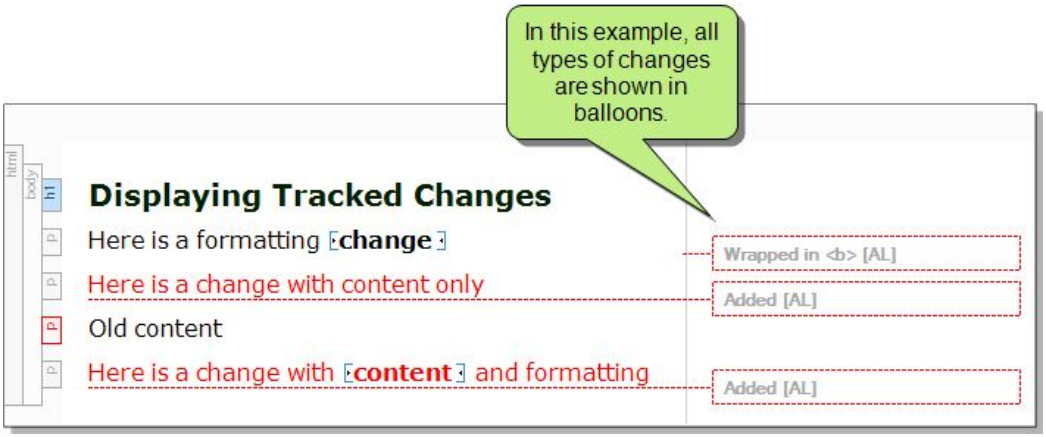
You can change the way tracked changes are displayed in the interface (e.g., in balloons, inline).

HOW TO CHANGE THE DISPLAY OF TRACKED CHANGES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Review** ribbon. In the **Options** section select **Review Options**.
   - **Menu** Select **Tools>Options**. Then in the Options dialog select the **Review** tab.
2. In the **Tracked Change Display** section, choose any of the following.

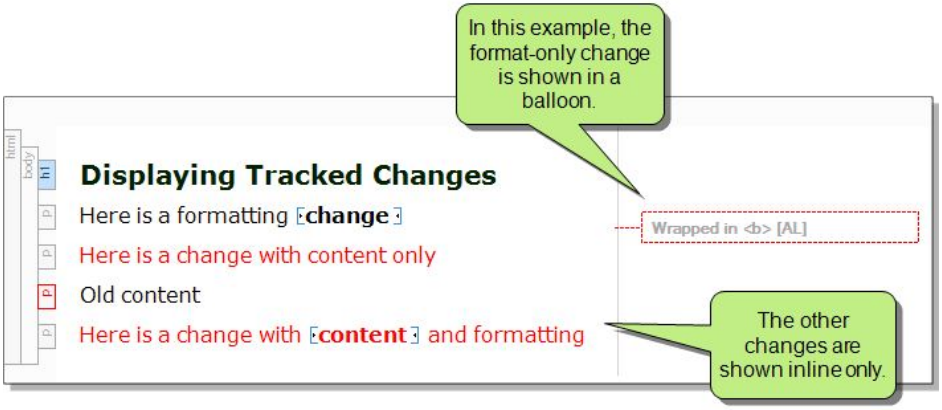
   DISPLAY ALL CHANGES IN BALLOONS

   If you select this option, all changes—text and formatting—will be shown in balloons in the sidebar.



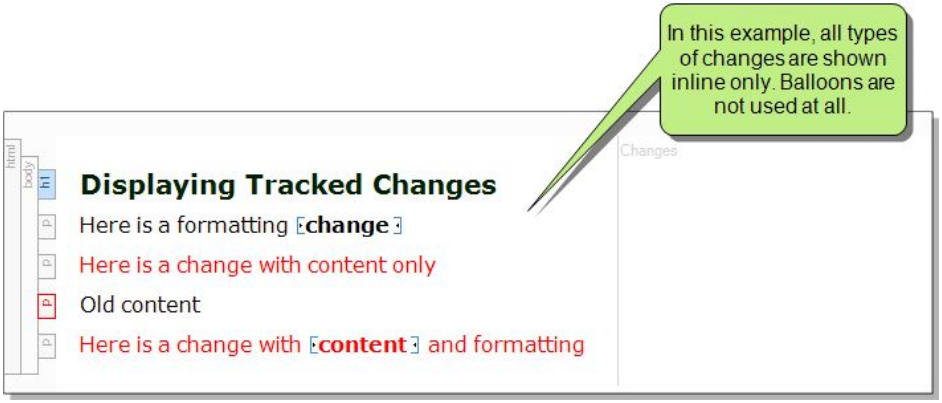
DISPLAY ONLY FORMAT CHANGES IN BALLOONS

If you select this option, changes that include content only (or content plus formatting) will be shown inline. But changes that contain formatting modifications only will be shown in balloons in the sidebar.



DISPLAY ALL CHANGES INLINE

If you select this option, all changes—text and formatting—will be shown inline.



3. Click **OK**.

Viewing Files with Changes

You can view a list of files with tracked changes (and annotations). You can then open the file where the changes are located and deal with them appropriately (e.g., accept or reject changes).

HOW TO VIEW FILES WITH CHANGES

1. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **View** ribbon. In the **Analysis** section select **Project Analysis>Files With Changes**.
   - **Menu** Select **View>Project Analysis>Files With Changes**.

   The Project Analysis window pane opens, with the "Files With Changes" option selected from the drop-down menu at the top. The area at the bottom of the window pane displays all topics in your project where tracked changes have been made.
2. To see more of the information in the window pane, drag the divider bar to make the pane wider:
   - **File** Displays the name of the file.
   - **Title** Displays the properties title of the file (if any).
   - **Folder** Displays the folder where the file is found.
   - **Change** Displays the type of change that was made.
   - **Initials** Displays the initials of the individual who made the change.
   - **Creator** Displays the user name of the individual who made the change.
   - **Timestamp** Displays the date and time when the change was made.
3. If a certain number of items have been found, page navigation buttons in the local toolbar may be enabled. You can use these buttons to go to additional pages to display more items.
4. You can double-click any file in the list to accept or reject the changes.

APPENDIX

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