MadCap Software

Templates Guide

Flare 10

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THIS GUIDE WAS CREATED USING MADCAP FLARE.

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CHAPTER 1

Introduction

When you create a project and add content (e.g., topics, snippets, stylesheets) or project-related elements (e.g., tables of contents, targets, skins) to it, you can use templates. A template is simply an existing file or element of the same type that you are creating. By basing your addition on a template, you are giving yourself a head start because the template already contains some settings or formatting for you.

In most cases, Flare provides you with one or more templates (called "factory templates"), so you do not need to worry about coming up with your own. However, if you want, you can create your own templates and use them when you create new projects or add new elements to a project.

This chapter discusses the following:

Example 6
Steps for Using Templates 7
Managing Templates 15
Contribution Templates 16
Exporting Projects to Templates 17

Example

The following example shows one way that you might make use of templates.

EXAMPLE

Let's say that you want to add a new target to a project. You already know that you want your target to share most of the same settings as other targets that you've created in the past, with a few minor exceptions. So when you add the target, you can base it on a target template that already contains all of the settings that are shared by your many targets. That way, you do not have to specify all of those settings manually in your new target. After the target is inserted into the project, you can adjust the new target as necessary.

Steps for Using Templates

Following are the main steps for using templates.

1. **Create Template Folders** The first step in using custom templates is to create a template folder, by selecting a folder that already exists. The template folder is simply the place where you will store your template files. You can have as many template folders as you need in order to hold all of your template files. In addition to selecting a folder on your local drive, you can also select a folder on a network, even on a SharePoint server (if you have previously connected to one). When you save a file (e.g., topic, page layout) as a new template and select a template folder, the appropriate template subfolder is added to that folder (e.g., topic templates are stored in a subfolder called "Content"; page layout templates are stored in a subfolder called "PageLayouts"). As a result, those files become accessible as templates when you create new features in Flare. Selecting a folder on a network is a great way to share template files with other Flare users. See "Creating Template Folders" on page 19.

2. **Create Templates** After creating a template folder, you can add one or more template files to it. See "Creating Templates" on page 21.

   What if the file being used as a template has links to other files (e.g., stylesheet, images)? Flare does not remove those links. Therefore, you need to make sure those ancillary files are also imported into the project and placed in the same location(s) relative to the file in question.

3. **Select Templates** Whenever you create new projects or add new elements (e.g., topics, page layouts, targets) to a project, you select the factory or custom template that you want to use.

E X A M P L E

Let's say you are working with a team of 10 other writers, and you want to create a topic called "Welcome" that each author should use in his or her projects at the root level of the Content Explorer. The template topic will contain some standard text and headings, as well as your company's logo. In addition, the topic links to a stylesheet, which will automatically give the topic the appropriate look and feel. The idea is that each author will create a "Welcome" topic in each of their projects, adding more content to that topic as needed; all "Welcome" topics should be consistent and look the same in all projects.

To accomplish this, you first open a Flare project and create the topic, placing it in the Content Explorer, but not in any subfolders. This is not to say that you cannot put the topic in a subfolder in the Content Explorer; rather, in this example, the topic just happens to be located at the root level. This is important because of the links to the stylesheet and the image in that topic. In the end, all authors will create this same topic in the same location in their projects, ensuring that the links will work.

When you are finished creating the topic, it might look something like this:

Welcome

Welcome to [Name of Product], which is used to [purpose of product].

How It Works

The following diagram shows how [Name of Product] works.

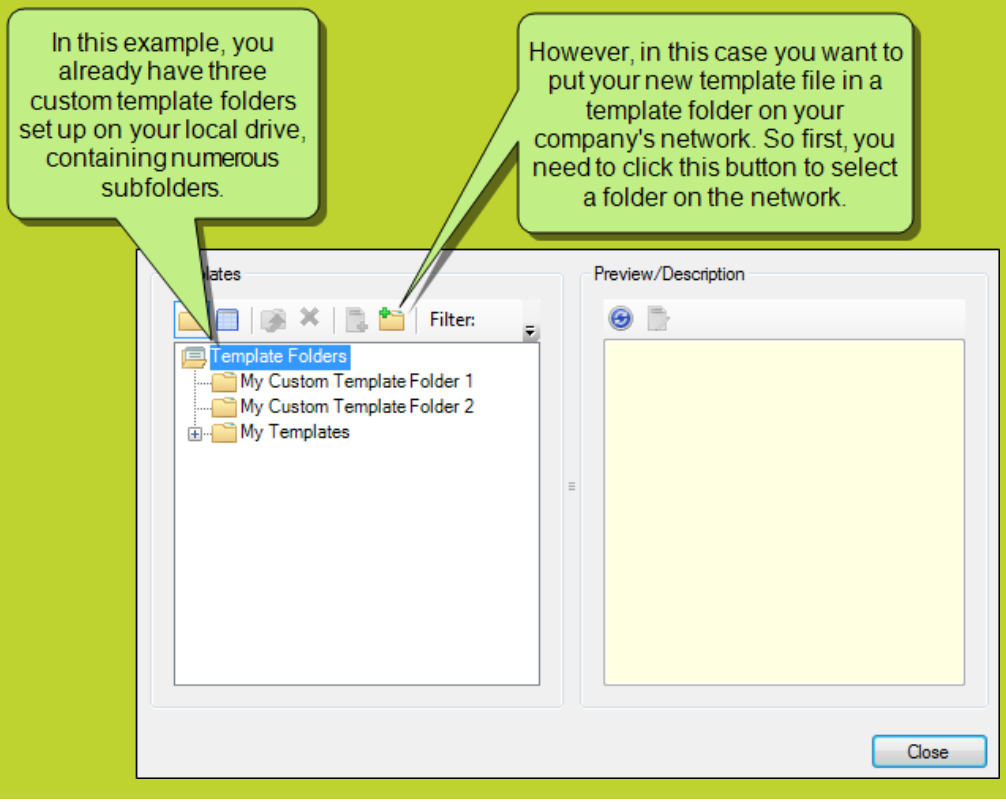
[Insert Process Image]

Steps

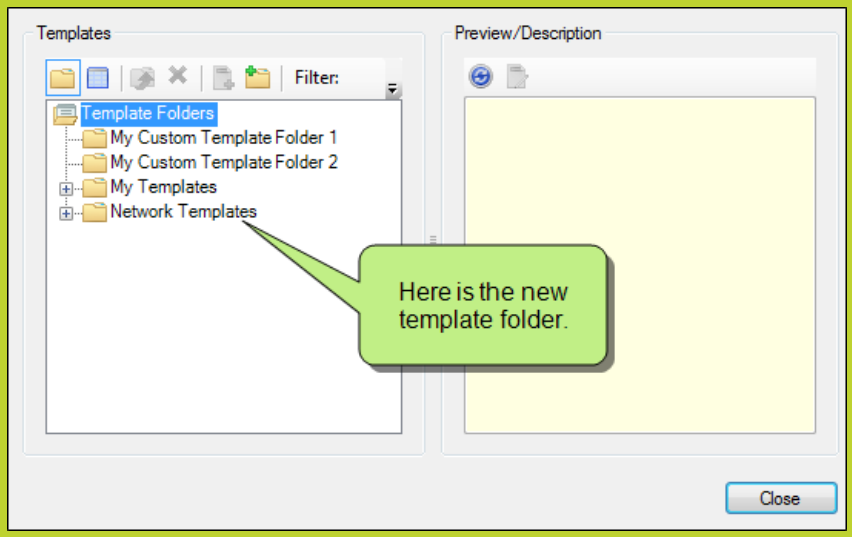
Following are the basic steps for using [Name of Product]:

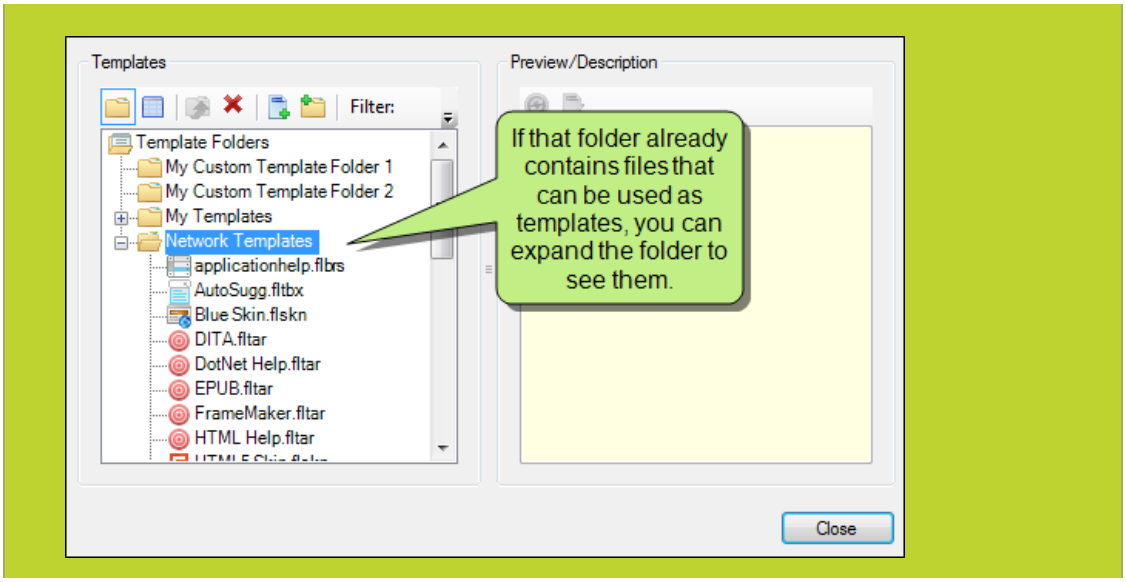
1. [Step one].
2. [Step two].
3. [Step three].

Now you need to make sure that you have a template folder ready to hold the new template file. Let's say you are working in the ribbon view, as opposed to tool strip view. Therefore, you select the **Tools** ribbon. In the **Templates** section you click **Manage Templates**. This opens the Template Manager.

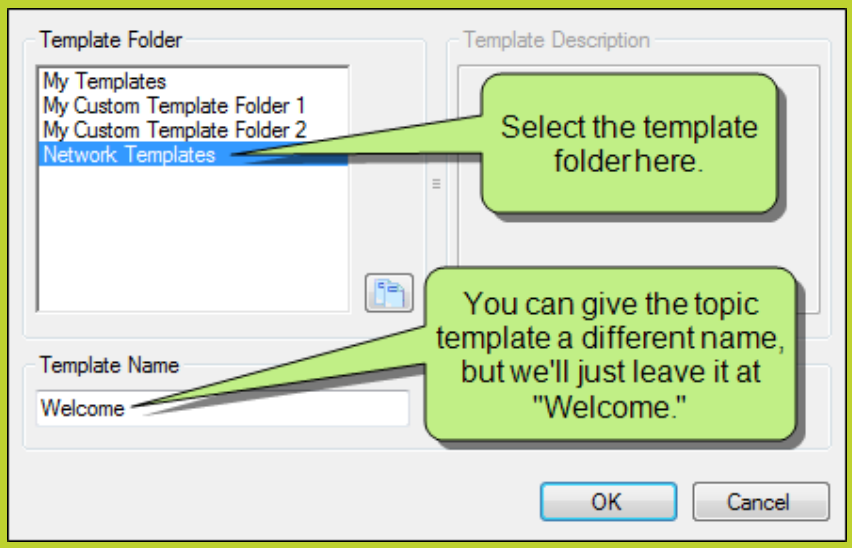


In the dialog that opens, you find and select the folder where you want to store the template file.

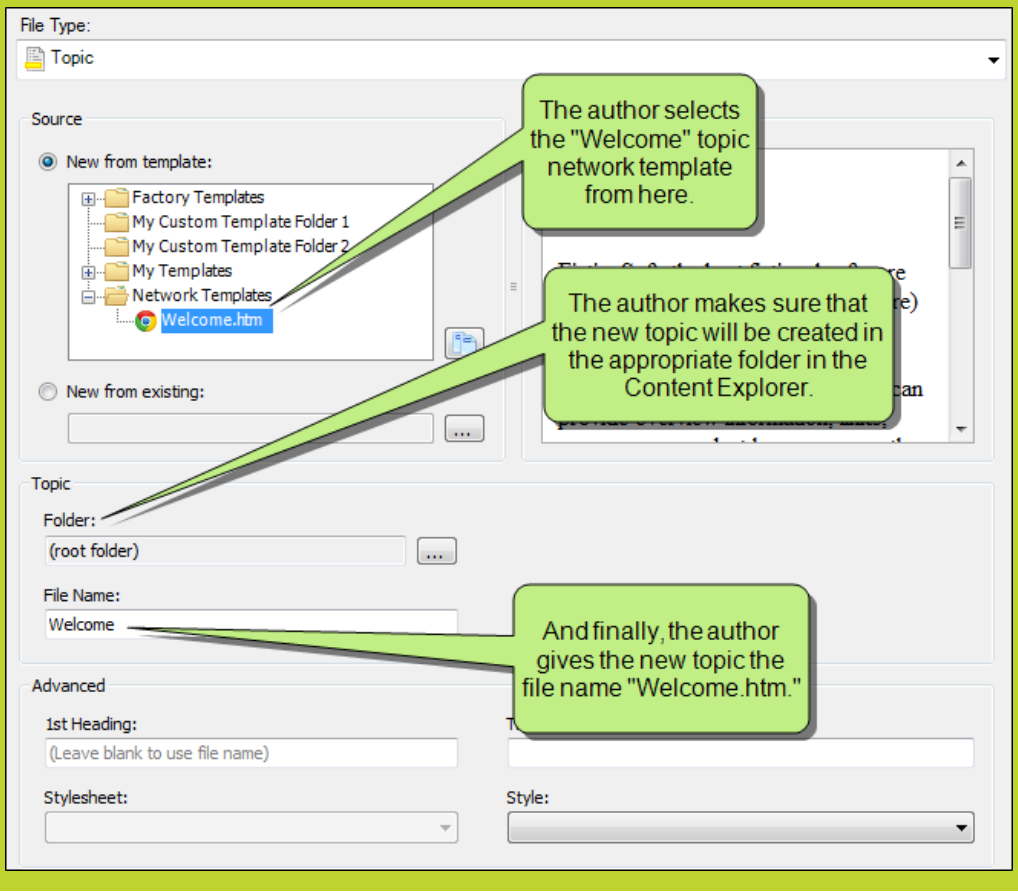



Templates
Filter:
Template Folders
My Custom Template Folder 1
My Custom Template Folder 2
My Templates
Network Templates
applicationhelp.flbrs
AutoSugg.fltbx
Blue Skin.flskn
DITA.fltar
DotNet Help.fltar
EPUB.fltar
FrameMaker.fltar
HTML Help.fltar
Preview/Description
If that folder already contains files that can be used as templates, you can expand the folder to see them.
Close

After closing the Template Manager, you make sure your new topic is still open. Then you select **File>Save>Save As Template**. In the dialog that opens, you select the new template folder and click **OK**.



Now let's say that one of the other authors wants to create a "Welcome" topic for a new project she is working on. In her Flare project, she selects **Project>New>Topic** (in ribbon view). In the dialog that opens, she selects the template file you created, chooses the correct location (in this case, the root folder), and provides a name for the new file. Then she clicks **Add** and **OK**.



The new topic is added to the author's project. However, it might not yet look just like the topic you created. Instead, it might look something like this:

Welcome

Welcome to [Name of Product], which is used to [purpose of product].

How It Works

The following diagram shows how [Name of Product] works.
[Insert Process Image]

Steps

Following are the basic steps for using [Name of Product]:

1. [Step one].
2. [Step two].
3. [Step three].

Notice that the image is missing, and the text is not colored.

In order for her topic to look just like your topic, she needs to add the same image and stylesheet files to her project, placing them in the same locations where you had them. If your stylesheet was in the Resources\Styles subfolder and your image was in the Resources\Images subfolder, that's where the author needs to place them as well. Therefore, the author brings those files into her project, perhaps by simply importing them or maybe through Global Project Linking.

Once the author brings those files into her project with the same names, places them in the appropriate locations, and associates the stylesheet with her project or at least with the new topic, her topic will look just like yours, and she can begin adding content to it.

Managing Templates

In addition to the main steps for using templates, you can manage templates in the Template Manager dialog. This dialog can be opened from the **Tools** ribbon or menu, by clicking the **Manage Templates** button that can be found in a variety of template-related dialogs (such as the Save As Template dialog). The Template Manager lets you do the following.

- Add template files
- Create template folders
- Open templates to edit them
- Delete templates
- Edit template descriptions.

See "Managing Templates" on page 29.

Contribution Templates

Authors, developers, or other individuals in your company can use MadCap 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.

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. For more information, see the online Help and the *Reviews and Contributions Guide*.

Following are basic tasks that you may perform when using contribution templates.

- "Creating and Sending Contribution Templates" on page 32
- "Sending Contribution Templates" on page 35
- "Viewing Contribution Templates" on page 36

Exporting Projects to Templates

When exporting a project, you can select an option that saves those files to your templates folder (e.g., Documents\My Templates\Projects). By being placed in this location, the project files become available as a template selection when you create a new project.For more information, see the online Help and the *Project Creation Guide*.

CHAPTER 2

Creating Template Folders

The first step in using custom templates is to create a template folder, simply by selecting a folder that already exists. The template folder is simply the place where you will store your template files. You can have as many template folders as you need in order to hold all of your template files.

In addition to selecting a folder on your local drive, you can also select a folder on a network, even on a SharePoint server (if you have previously connected to one). When you save a file (e.g., topic, page layout) as a new template and select a template folder, the appropriate template subfolder is added to that folder (e.g., topic templates are stored in a subfolder called "Content"; page layout templates are stored in a subfolder called "PageLayouts"). As a result, those files become accessible as templates when you create new features in Flare. Selecting a folder on a network is a great way to share template files with other Flare users.

HOW TO CREATE A TEMPLATE FOLDER

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 Templates**.

   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 **Tools>Manage Templates**.

   The Template Manager opens.

2. Click .
3. In the Select dialog, find and select the folder where you want to store template files.
4. After you have selected the folder, click **OK**.
5. In the Template Manager, click **Close**.

CHAPTER 3

Creating Templates

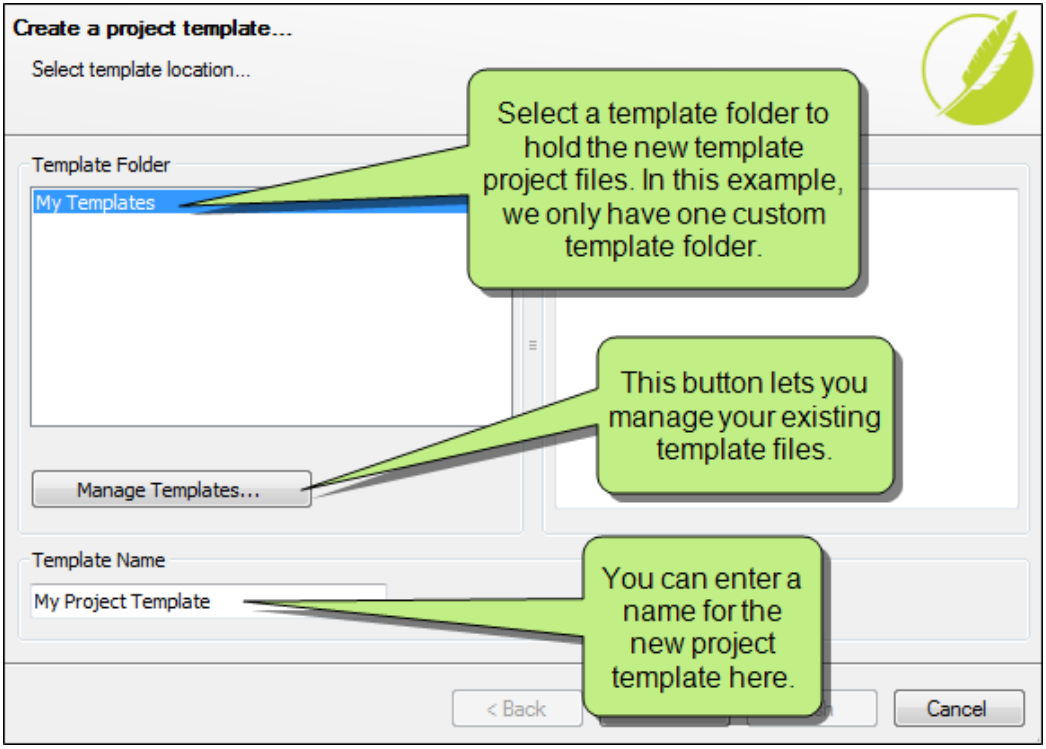
After creating a template folder, you can add one or more template files to it. A template is simply an existing file or element of the same type that you are creating (e.g., a project, topic file, target file, snippet file).

You can create templates of entire projects or individual files within a project. There are two ways to create a template from an individual file: (1) with the file open and (2) from the Template Manager.

HOW TO CREATE A TEMPLATE OF AN ENTIRE PROJECT

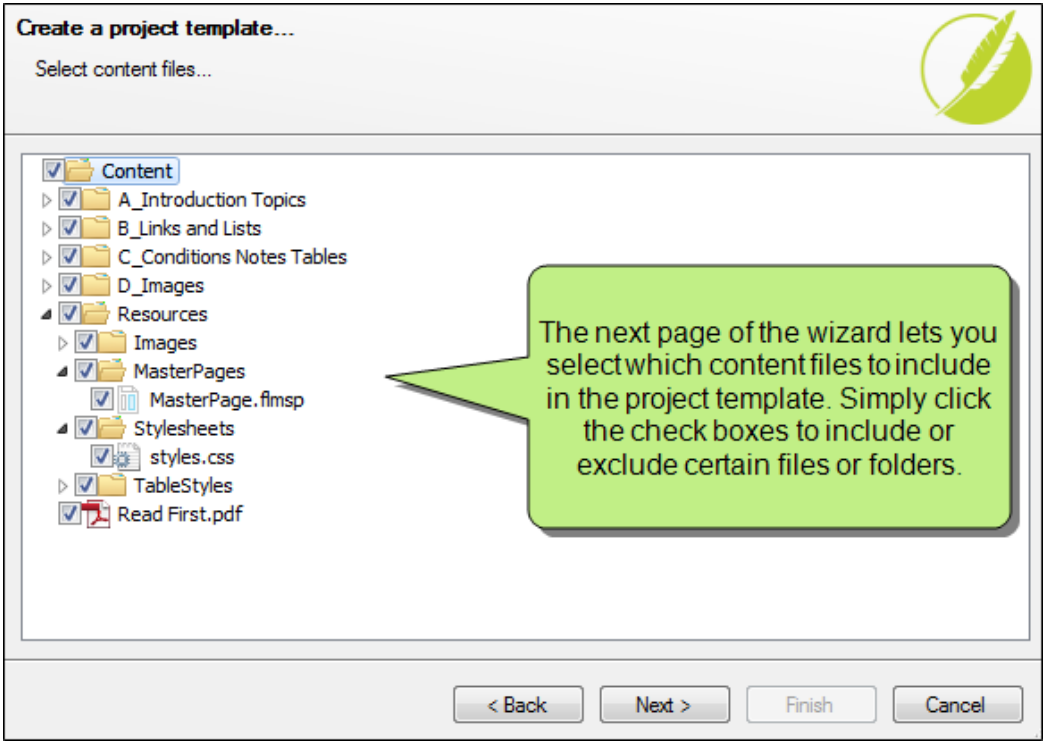
1. Create a project, adding all of the content, elements, and settings that you want to be part of the project.
2. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select the **Project** ribbon. In the **Save** section select **Save Project As Template**.
   - **Menu** Select **Project>Save Project As Template**.

   The Save Project As Template Wizard opens.
3. In the **Template Folder** section, select the folder where you want to store the template files.
4. The **Template Name** field, enter a name for the new template.



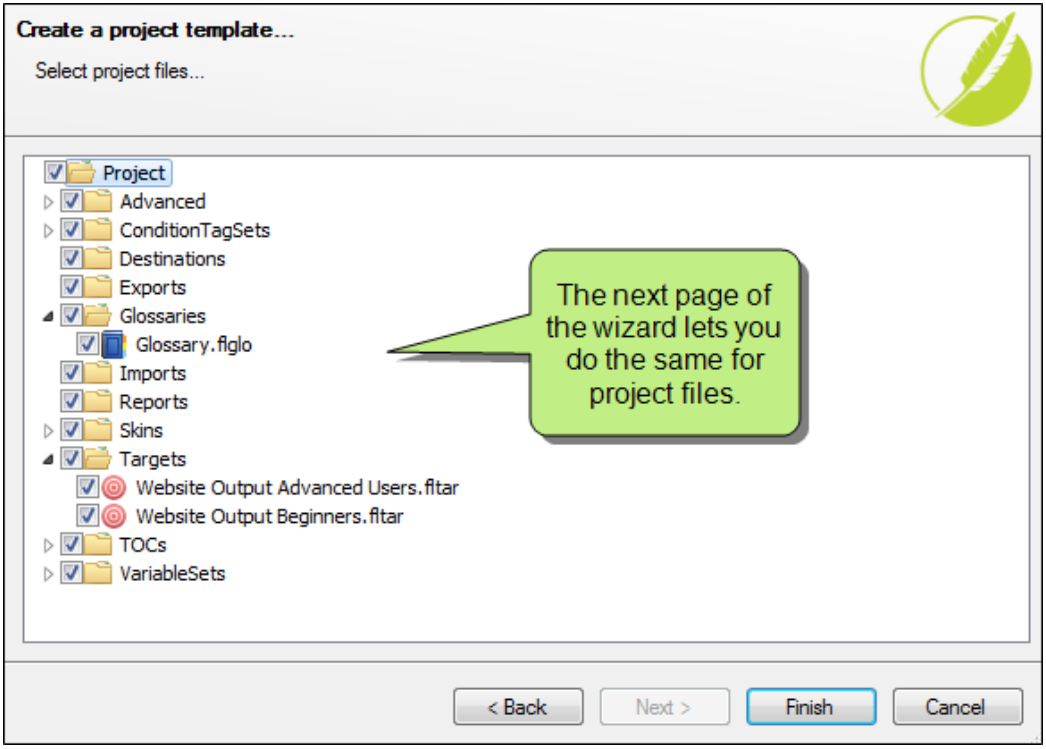
5. Click **Next**.

6. On the next page of the wizard, make sure a check mark is next to each content folder or file that you want to include in the project template. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary.



7. Click **Next**.

8. On the next page of the wizard, make sure a check mark is next to each project folder or file that you want to include in the project template. By default, all of the boxes are checked, but you can click in any of the boxes to remove the check marks if necessary.

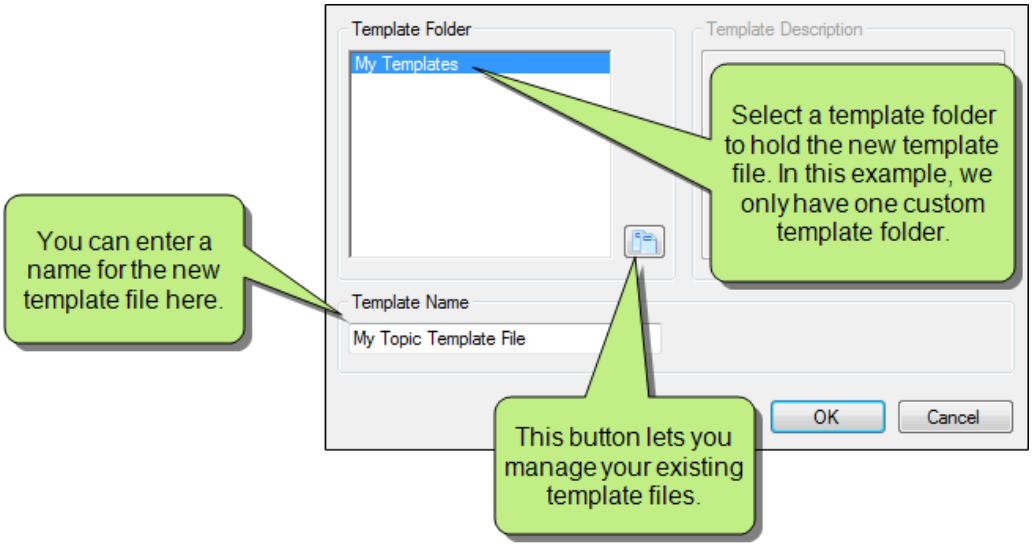


9. Click **Finish**.

HOW TO CREATE A FILE TEMPLATE—WITH THE FILE OPEN

1. In Flare create the element (e.g., topic, target, skin, master page) that you want to use as a template.
2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.
3. Do one of the following, depending on the part of the user interface you are using:
   - **Ribbon** Select **File>Save>Save As Template**.
   - **Menu** Select **File>Save As Template**.

   The Save As Template dialog opens.
4. In the **Template Folder** section, select the folder where you want to store the template file.
5. The **Template Name** field, enter a name for the new template.

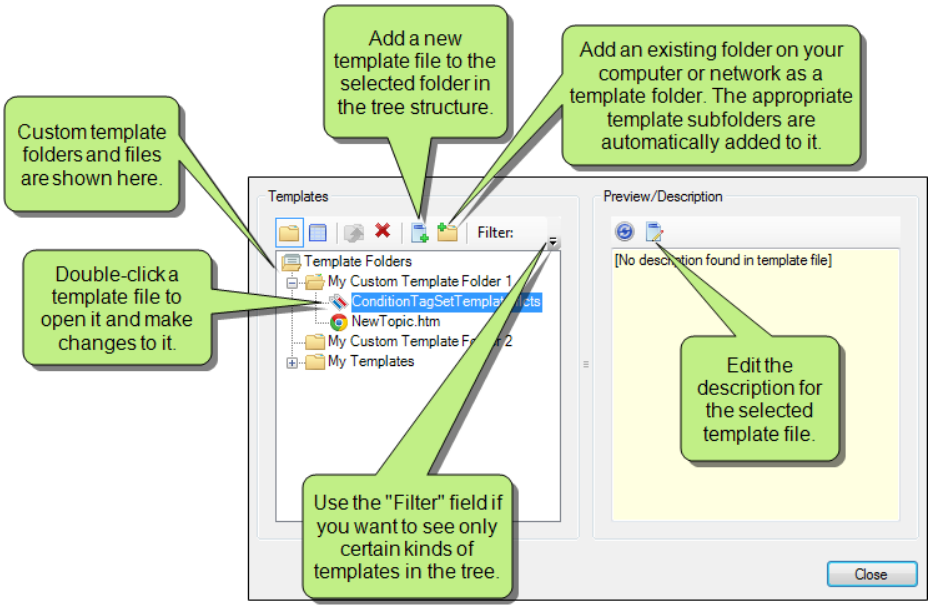


6. Click **OK**.

HOW TO CREATE A FILE TEMPLATE—FROM THE TEMPLATE MANAGER

1. In Flare create the element (e.g., topic, target, skin, master page) that you want to use as a template.
2. Add content or settings to the element as you normally would. When you use the template to create more elements in the future, those new elements will start out with the same content or settings as your template file.
3. Click to save your work.
4. 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 Templates**.
   - **Menu** Select **Tools>Manage Templates**.

   The Template Manager opens.
5. In the built-in tree, find and select the folder where you want to store the template file.
6. Click .



7. In the dialog that opens, find and double-click the file that you want to add as a template.

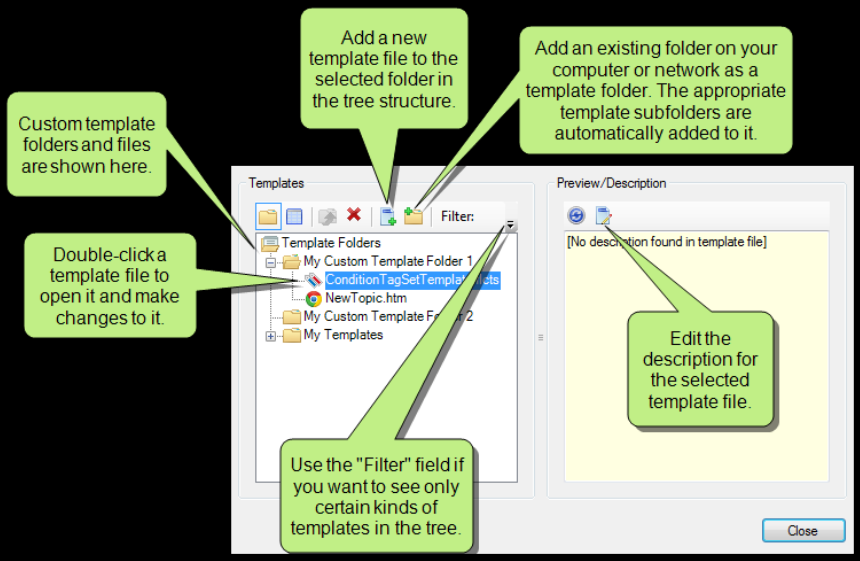
8. In the Save As Template dialog click **OK**.
9. In the Template Manager dialog click **Close**.

After you create a template, you can select it whenever you create a new element of the same type (e.g., you can select a topic template when creating a new topic).

CHAPTER 4

Managing Templates

You can manage your template files from within the Template Manager dialog. This dialog can be opened from the **Tools** ribbon or menu, by clicking the **Manage Templates** button that can be found in a variety of template-related dialogs (such as the Save As Template dialog).



Following are the primary tasks that can be accomplished in the Template Manager dialog.

- **Add Template Files** You can add files to any of your existing template folders. Therefore, those files become available as templates when you create new features in Flare. See "Creating Templates" on page 21. To add a template file in the Template Manager, select the folder where you want it to be stored and then click .
- **Create Template Folders** You can find and select an existing folder on your local drive or on a network, even on a SharePoint server (if you have previously connected to one). When you save a file (e.g., topic, page layout) as a new template and select a template folder, the appropriate template subfolder is added to that folder (e.g., topic templates are stored in a subfolder called "Content"; page layout templates are stored in a subfolder called "PageLayouts"). As a result, those files become accessible as templates when you create new features in Flare. This is a great way to share template files with other Flare users on your network. See "Creating Template Folders" on page 19. To create a template folder in the Template Manager, click .
- **Open/Edit Template Files** If you want to open a template file to make changes to it, you can double-click it in the Template Manager. You can also right-click the file and select **Open**.When you open a template file, it opens in the appropriate editor, just as a regular file would open. However, the following message displays at the top of the editor to let you know that the file you are modifying is a template file that is not located in the current project:

  The file you are editing exists outside of the current project.

- **Delete Template Folders and Files** If you no longer want certain template folders or files, you can select it in the Template Manager and press **Delete**.
- **Edit Template Descriptions** Many template files can include a template description, which is shown when you work in the Template Manager or if you select the template when creating a feature in Flare. In the Template Manager, you can edit the description for any XML template files, except XHTML files. For example, you can edit descriptions for target, skin, TOC, and destination template files, but you cannot edit descriptions for topics, snippets, stylesheets, images, and multimedia files. You might find this feature useful if you are working with a team of writers and need a good description of each template; therefore, each author will easily know the purpose of the template. To create or edit the description for a template in the Template Manager, first select the template file in the built-in tree and then click . Then type a description for the template and click **OK**.

CHAPTER 5

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.

This chapter discusses the following:

Creating and Sending Contribution Templates 32

Sending Contribution Templates 35

Viewing Contribution Templates 36

Creating and Sending Contribution Templates

Following are steps for creating and sending a contribution template.

HOW TO CREATE AND SEND CONTRIBUTION TEMPLATES

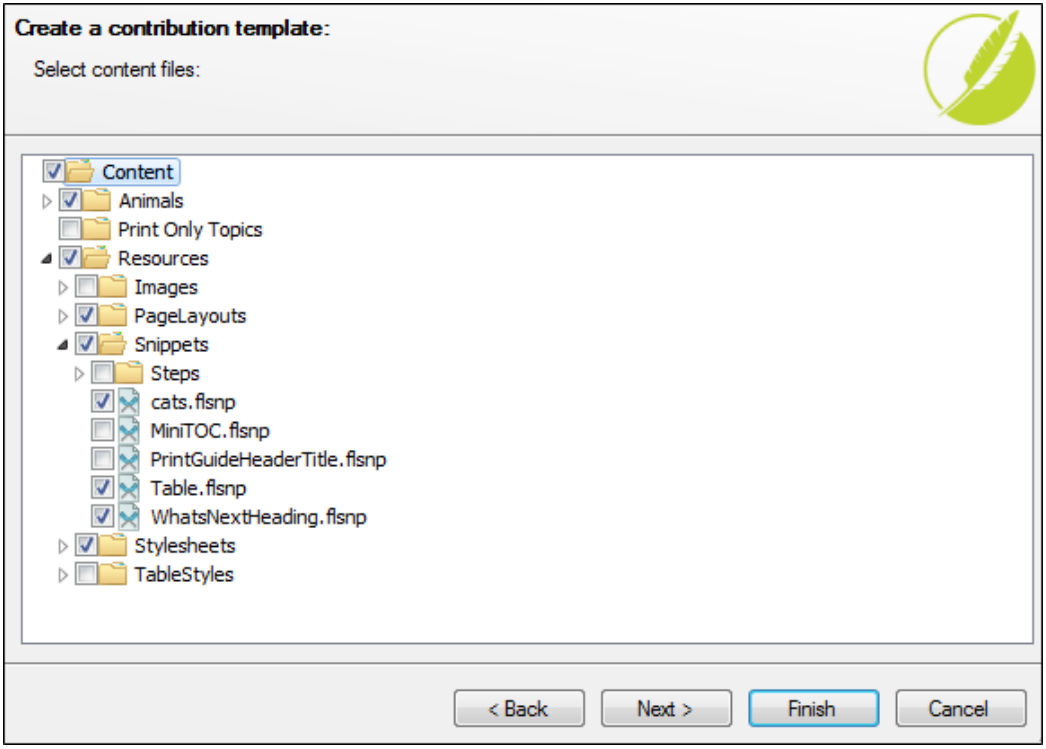
1. Create a topic or open an existing one, and add any content that you want to be part of the ready-made template for contributors (e.g., text, images).
2. (Optional) If there are parts of the topic that you do not want contributors to modify, apply locks to those areas. For more information see the online Help.
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.

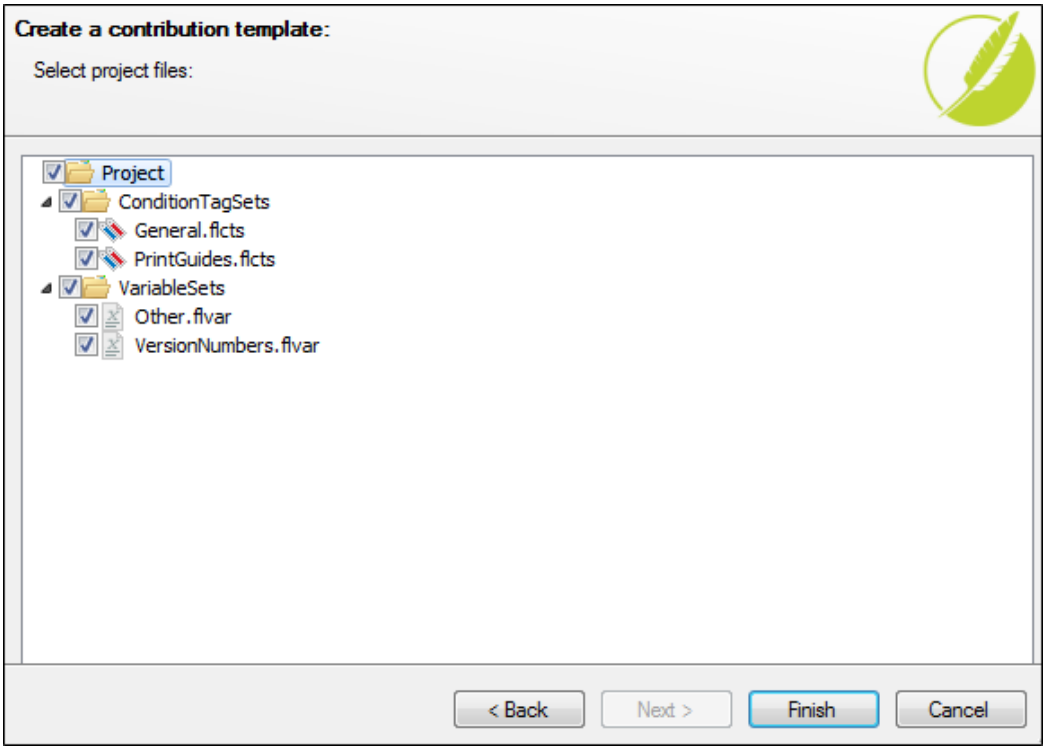
   The default location is Documents/My Contribution Templates. This is the location used if you do not select one.

   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.

Sending Contribution Templates

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 32.

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.

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 the previous page.

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