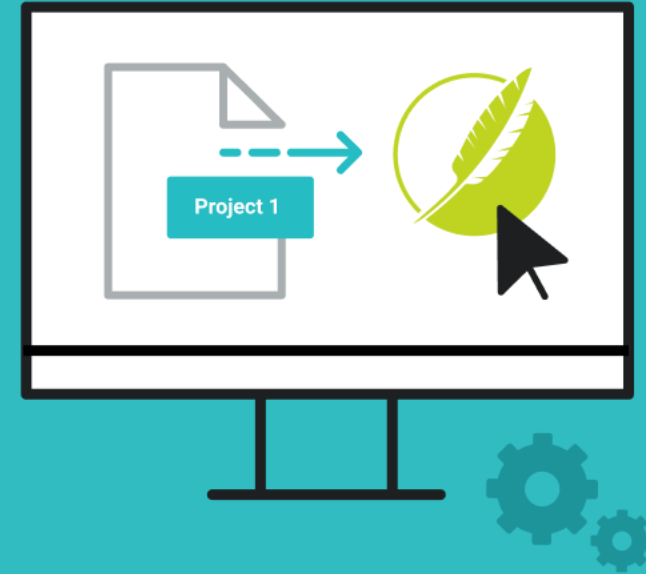




LIVE WEBINAR

# Migrating Large Projects into MadCap Flare



Presented By:

**Thomas Bro-Rasmussen**

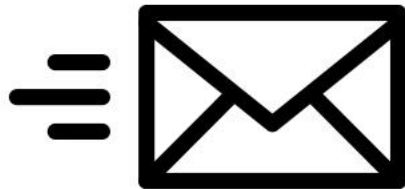
TBRO

**Scott DeLoach**

ClickStart



## Before We Get Started...



The webinar will be recorded  
and emailed to all registrants



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throughout the webinar

# Areas covered today

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1. “Basic” import process (*Scott DeLoach*)
2. The challenging conversions (*Thomas Bro*)
3. Pushing data into Flare (*Thomas Bro*)

# **“BASIC” IMPORT PROCESS**

*Click**Start***

# Overview

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Focus “Basic” import process

File Types HTML, Markdown, FrameMaker, Word

## Process

- Analysis
- Pre-import
- Import
- Post-import

# ANALYSIS

# Process

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- Does it need to migrate?
- Who should migrate it?
- When should you migrate?
- When will you switch to Flare?
- Timeline
  
- Redesign
- Reorganization

# Formatting - styles and tags

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- Headings
- Tables
- Lists
- Alerts



# Images

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- Sizes
- Positions
- Callouts
- Storage location(s) and organization
- Format(s)

# Layout(s) and structure

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- Sections
- Page types
- Headers/footers
- Numbering scheme(s)
- Navigational items (TOC, index, glossary, etc)

**PRE-IMPORT**

# Cleanup & standardization

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- Inline formatting / inconsistency
- Headings
  
- Match existing styles in Flare?

# Duplication

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- Existing duplication and potential single sourcing
- Chapters and pages
- Content types - text, images, tables, lists
  
- Global project?

**IMPORT**

# Importing content

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- Create import file.
- Set the import options.
- Click **Import**.

# Flexibility

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- Multiple import files
- Reimporting
- “Batches”



**POST-IMPORT**

# Sanity check

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- Content
  - TOC
  - Broken links
- Formatting
- Organization
  
- Document the process

# Reimporting

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- Source file locations
- Auto-reimport
- “Breaking the link”

# Cleanup

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- Styles and tags
- Images
- Layout(s)
- Single source any content duplication
  
- Batch cleanup
- Automate as much as possible

# THE CHALLENGING CONVERSIONS



# The challenging conversions

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- Conversions from any tool which is not directly supported by Flare, e.g.:
  - InDesign
  - Quark Xpress
  - PowerPoint
  - Interleaf
  - Ventura
  - Word Perfect
  - Google Docs
  - And others

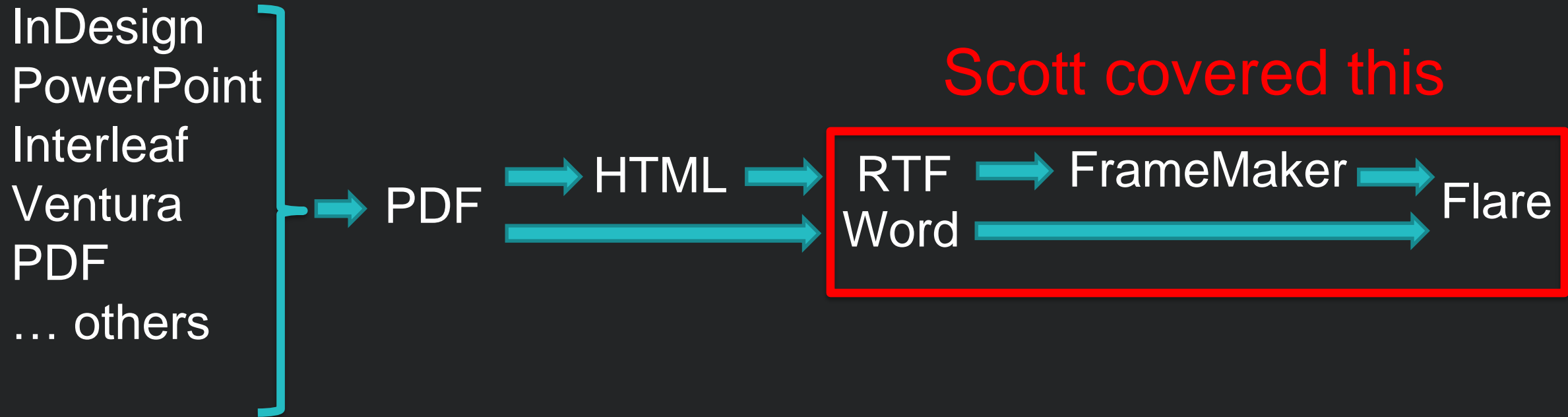
# Why are they difficult

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- Text flows often do not exist (e.g. InDesign)
- If text flows are there, they are not used consistently
- Legacy formats (Ventura/Interleaf)
- Bad or no use of styles
- Some are rare – but still in use
- Tables may not even be tables (e.g. Ventura)
- Images can be embedded (in poor resolution)

# The flow

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**PDF**

# Get a PDF

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- After all PDF is well known
- Most programs can save/export/create PDF's
- Even though text is with no styles – it still makes sense
- Even though images are embedded – it still makes sense
- There is (often) a certain kind of structure
- You can save, export or print from a PDF

# Choice of format

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- Choose HTML, RTF or WORD
- One important issue is to save images and retain/create a link to these (like in Flare).
- Determine the structure of the PDF (even though there might not be one)
- The result is not always as expected (the InDesign conundrum)
- Flare works best with structure. PDF hasn't got it.  
In the conversion process structure has to be created

**WORD, RTF**

# Word/RTF – an intermediate step

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- Do what you can in Word, RTF (search replace)
- Styles do not appear miraculously out of PDF file
- Make sure to convert and any text boxes to be part of the text flow
- Ensure images are linked (makes life easier and Word more stable)

## Challenge

- Unless you use VBA, you can only work on **one** file at a time

**FRAMEMAKER**

# FrameMaker has something ...

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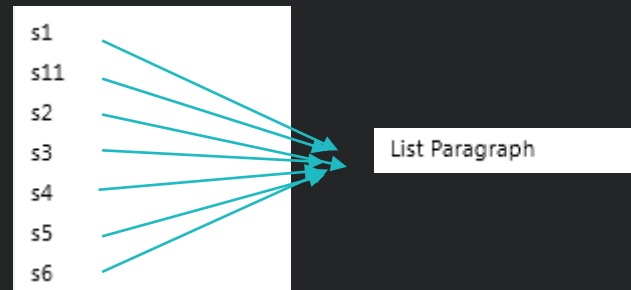
- FrameMaker has some advantages which makes it ideal for import to Flare.
- FrameMaker is the tool which comes closest to what Flare does
- Create your final structure in FrameMaker
- FrameMaker can work on Word/RTF at the same time.
- FrameMaker also exist in a MIF, XML format
- How to get to this?

# FrameMaker (natively)

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- It can work on many files (=all) at the same time
- It can convert formatted (font metrics) to actual styles
- You can batch convert styles from many to one
- Convert Anchored frames into styles (if so needed)
- + `FrameScript`

FrameMaker  
creates these  
from fonts metrics



All of these (similar font  
metrics can be batch  
converted into a single  
sourced style



# PATTERNS

# Patterns are important

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- In any step you should look for patterns
- Or create them if need be
- The importance is that from a pattern you can create structure
- ... it possibly require scripting, automation, macros – but it's worthwhile

**PUSHING CONTENT  
INTO FLARE**

# Pushing content into Flare

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- If you have data outside of Flare in a structured way (Excel, database, XML) it is possible to push this into Flare
- In the process **everything** needed is created
- This is beyond simple development

# adFlare – a solution

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- Enjoy the speed



**TAKE AWAYS**

# Good to remember

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- It's a balance if/when you should invest in migration
- There's a breaking point where copy/paste is easier
- Remember it's often a one time off "thing" – so should you do it
- Regard it as an investment
- Conversion of large number of materials takes time and effort
- It pays off to learn a bit about using Macros (in Word or Windows based). Take the top off the tedious repetitive tasks.

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Questions?



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**Thank You**