madcap software

USER GUIDE

MADCAP CENTRAL

Getting Started Guide

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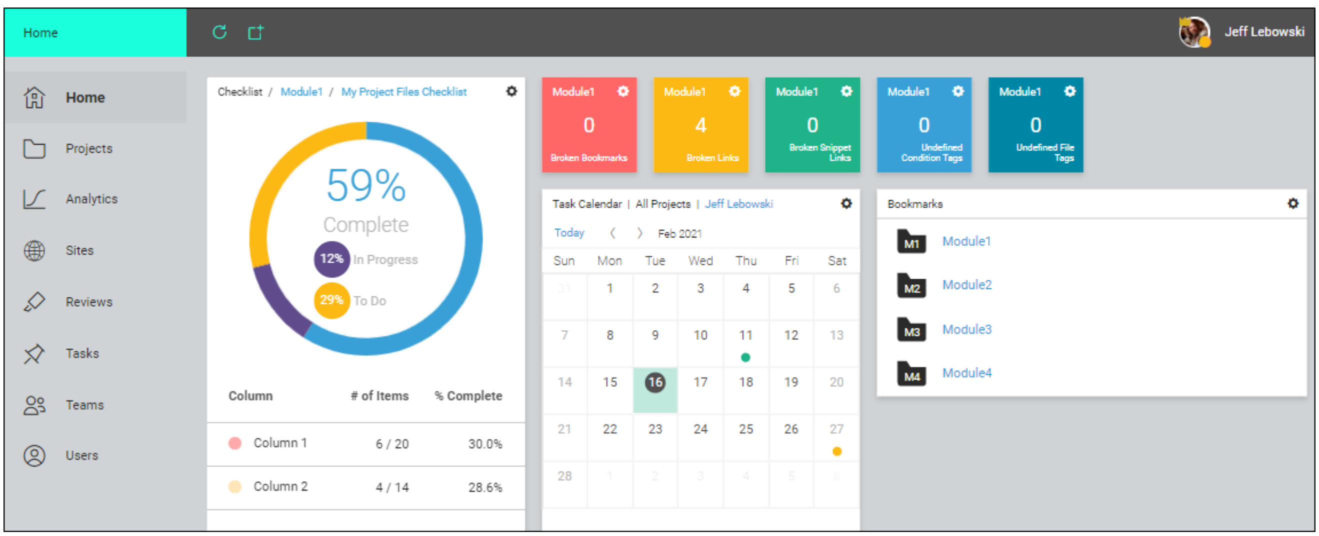
THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 1

Introduction

MadCap Central is a cloud-based platform that lets you plan, track, and manage the processes, content, and teams that are at the heart of your organization. It is especially ideal for MadCap Flare users, but even non-Flare users can take advantage of MadCap Central.



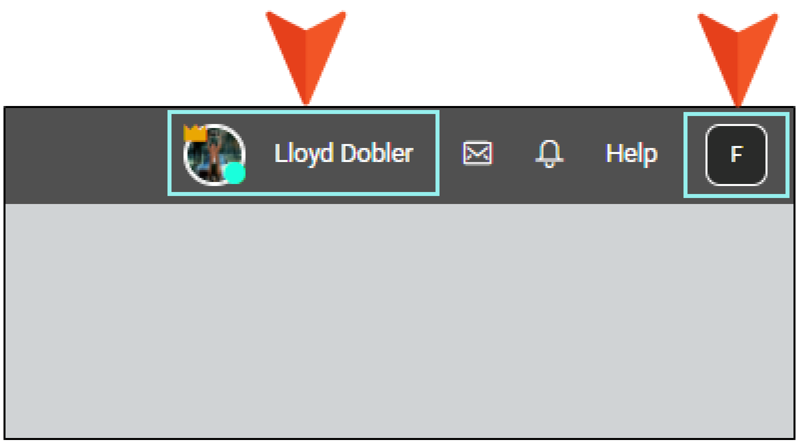
This guide discusses the following:

- Interface Take a quick look at the basic areas of the interface, especially the main navigation framework. See "Interface" on page 7.
- Users and Permissions Learn about inviting users to your license and setting permissions to control what each person is allowed to do. See "Users and Permissions" on page 15.
- Teams Discover how you can organize users on your license into teams. See "Teams" on page 21.
- Projects and Builds See how you can create projects directly in Central, upload projects, associate users with them, and manage builds (output). See "Projects and Builds" on page 24.
- Sites Learn about using sites to manage your output (live and/or private), as well as the domains (URLs) for accessing the output. See "Sites" on page 43.
- Analytics View user activity on published Flare HTML5 output. See "Analytics" on page 44.
- Reviews Take a look at how you can view, edit, and manage Flare review files. See "Reviews" on page 45.
- Tasks Understand how tasks can help you manage your workload and processes. See "Tasks" on page 48.
- Widgets Learn how to insert information objects (widgets) into your Home and Project dashboards. See "Widgets" on page 64.

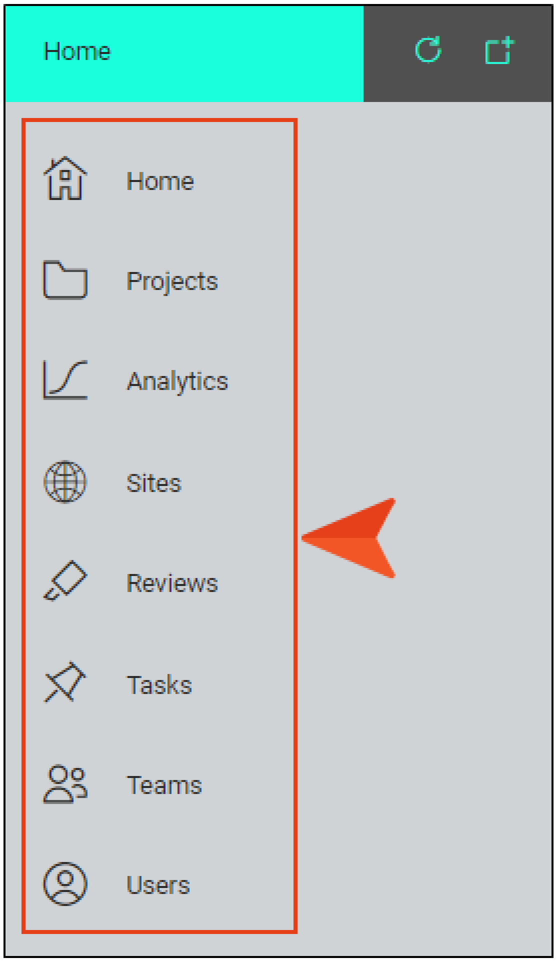
CHAPTER 2

Interface

After you first log in to Central, you will see your name at the top, and the avatar (or initial) representing your license is on the right side. If you are a user on more than one license, you can click it to switch between licenses without signing out.



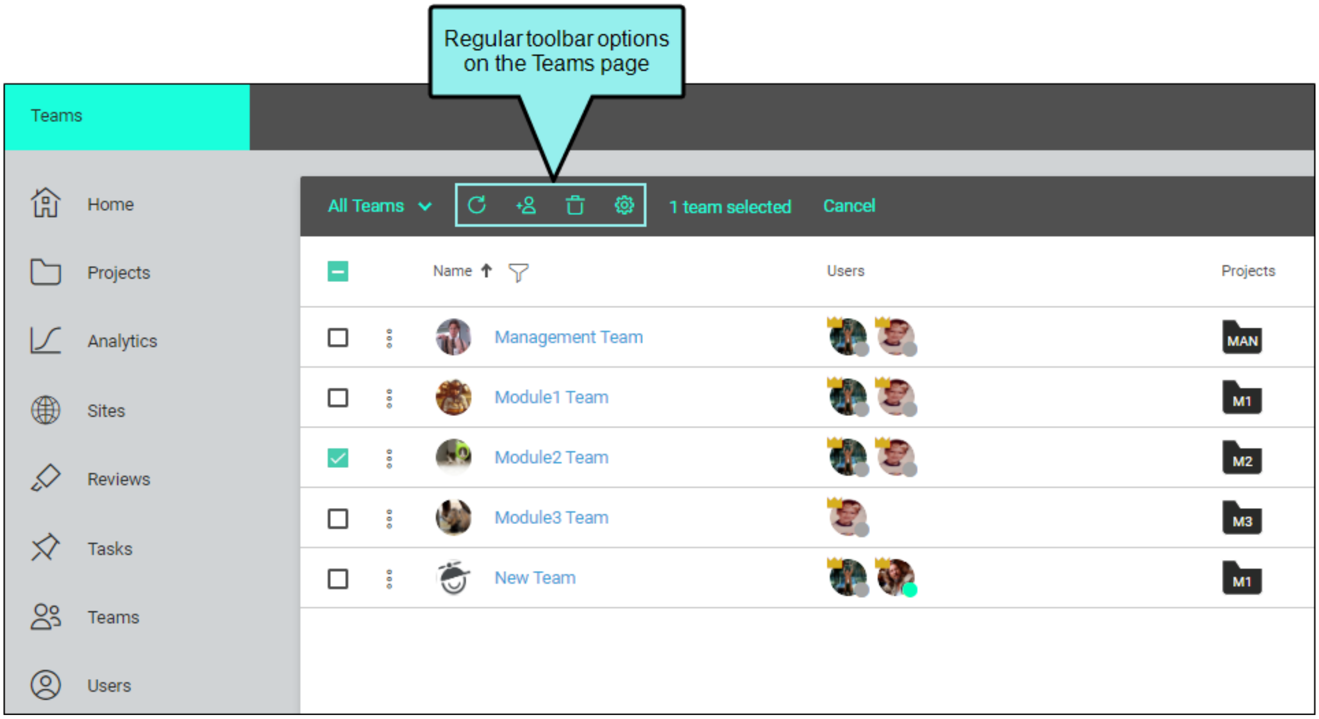
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Tasks, Reviews, Teams, Users, and Translation.

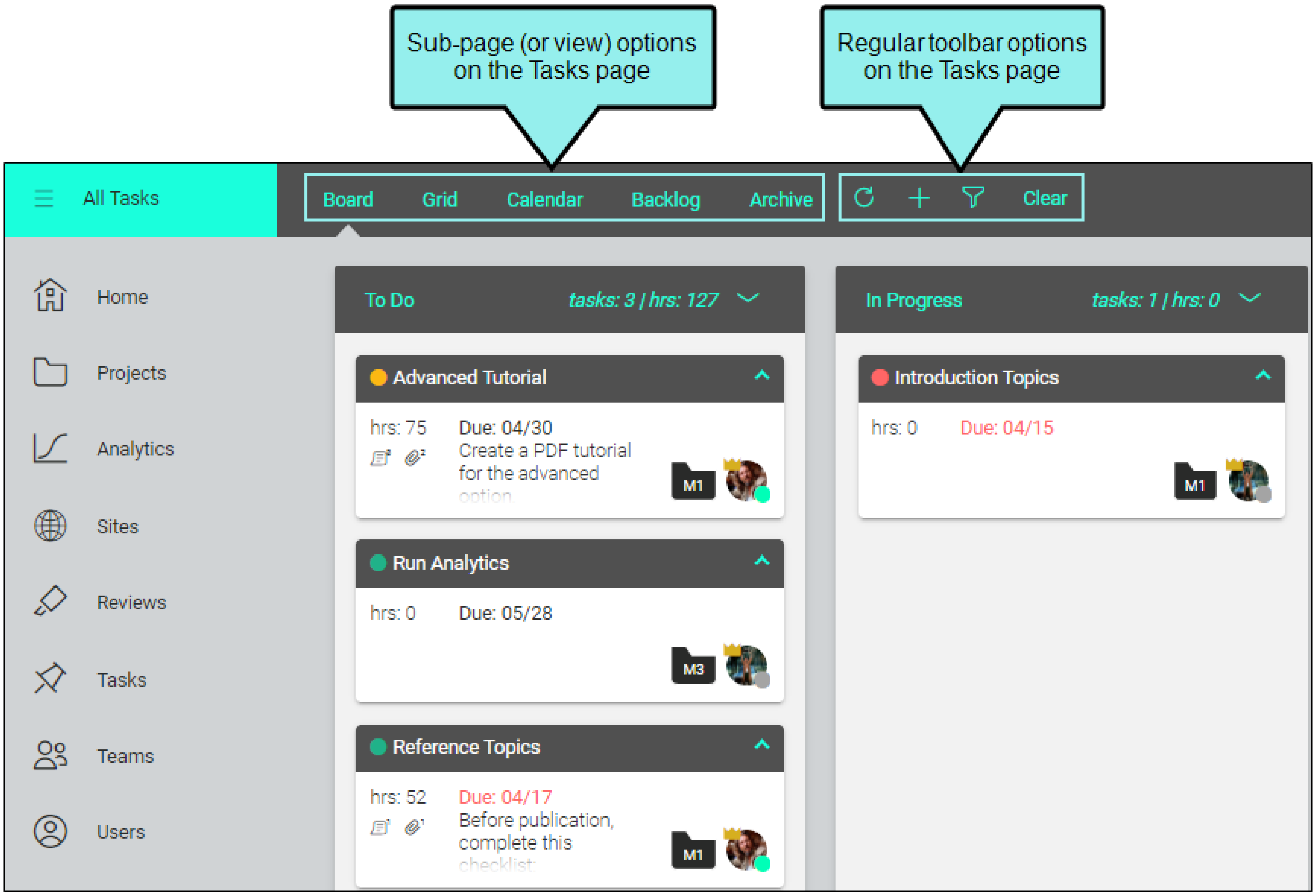


NOTE If you are a subject matter expert (SME), rather than a Flare author, you will only see the Reviews page.

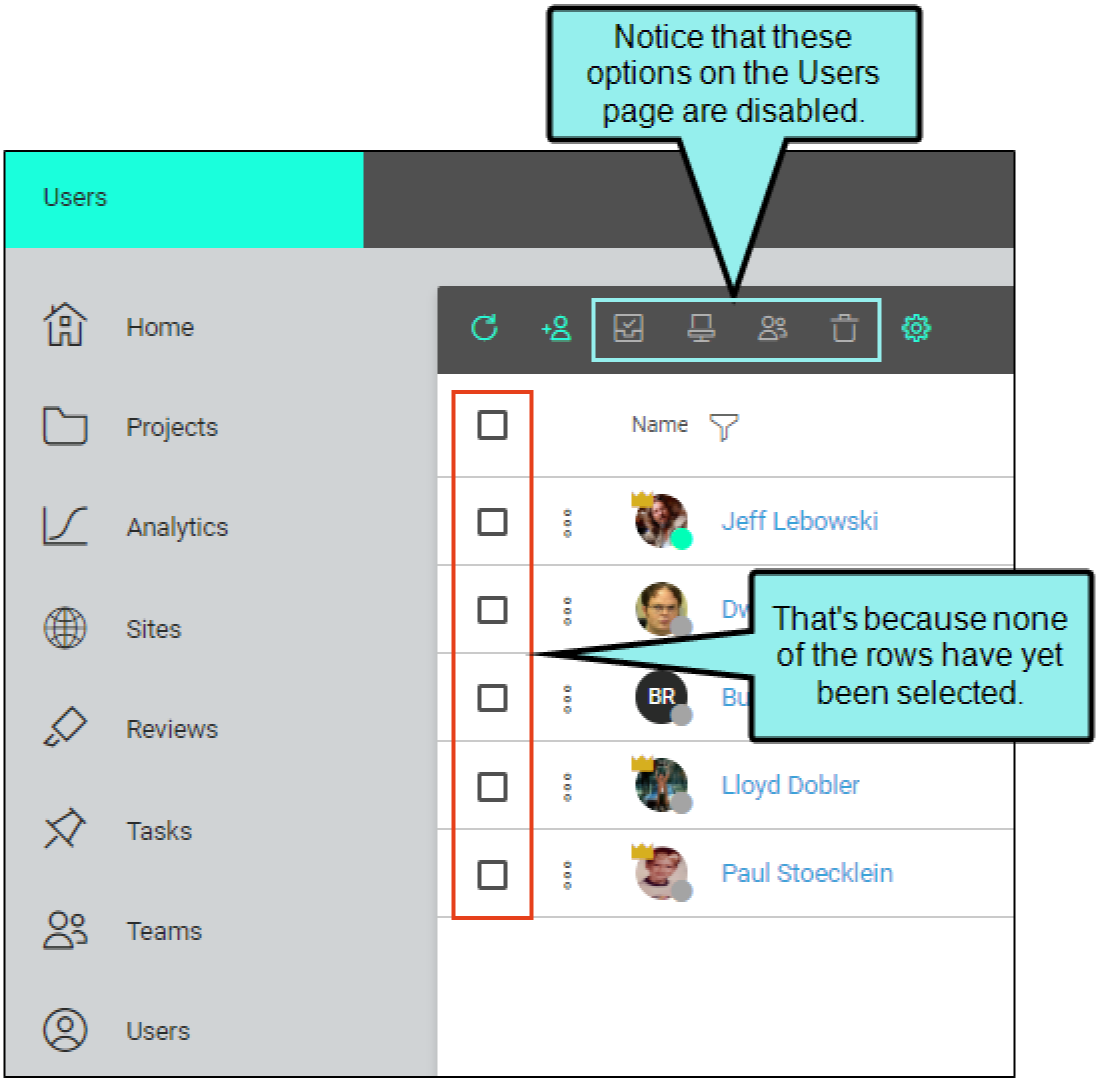
Your Home dashboard is initially empty, but you can add widgets to it by clicking at the top. Widgets provide a quick glance of various types of information throughout your system. See "Widgets" on page 64.

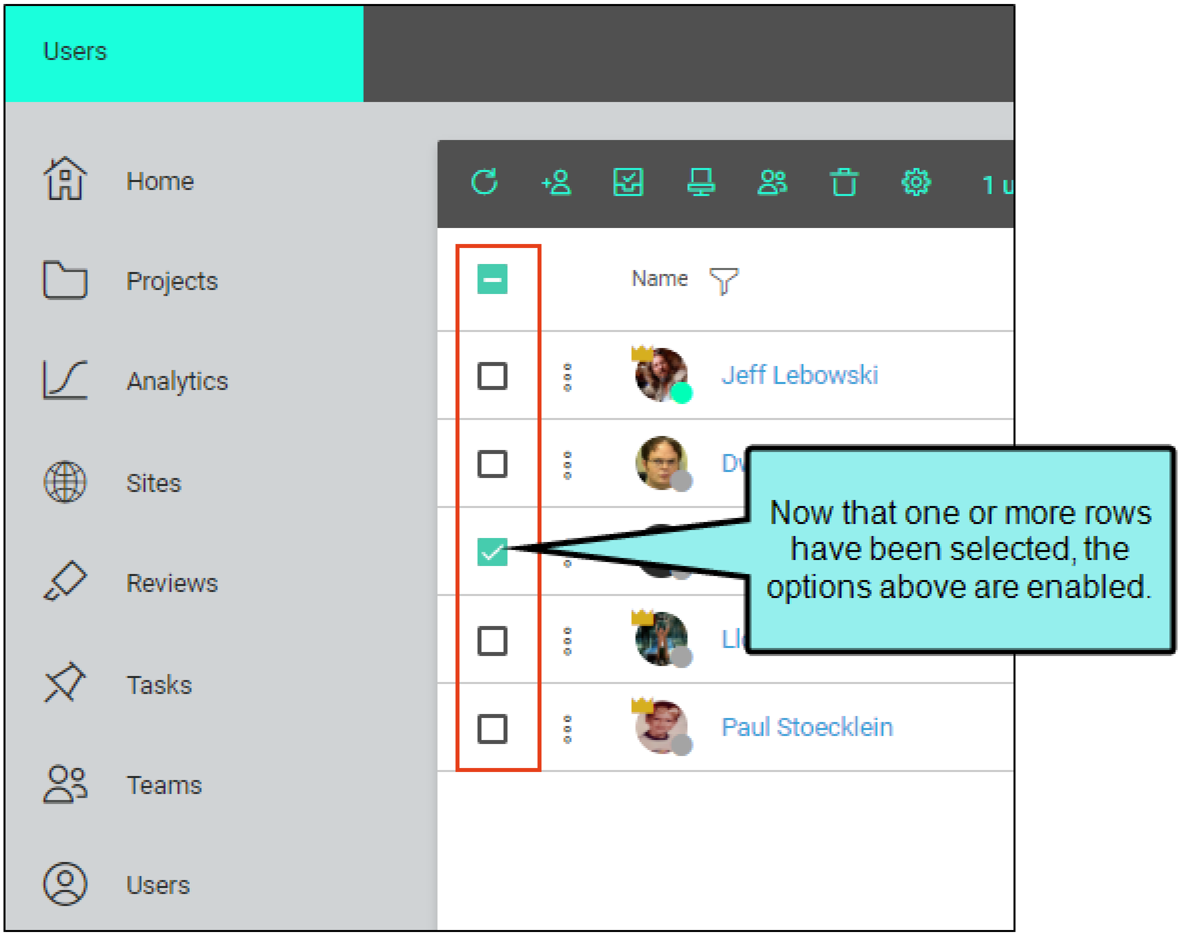
Each page in Central has a toolbar that lets you add, manage, and remove information on that page. Some pages—such as Projects and Tasks—have additional options at the very top of the interface, which let you see different sub-pages (or views).




Sub-page (or view) options on the Tasks page
Regular toolbar options on the Tasks page
All Tasks
Board
Grid
Calendar
Backlog
Archive
Clear
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
To Do
tasks: 3 | hrs: 127
In Progress
tasks: 1 | hrs: 0
Advanced Tutorial
hrs: 75
Due: 04/30
Create a PDF tutorial for the advanced option
M1
Introduction Topics
hrs: 0
Due: 04/15
M1
Run Analytics
hrs: 0
Due: 05/28
M3
Reference Topics
hrs: 52
Due: 04/17
Before publication, complete this checklist
M1

Depending on the page, some toolbar options might not be accessible until you make selections by clicking the check boxes next to rows.

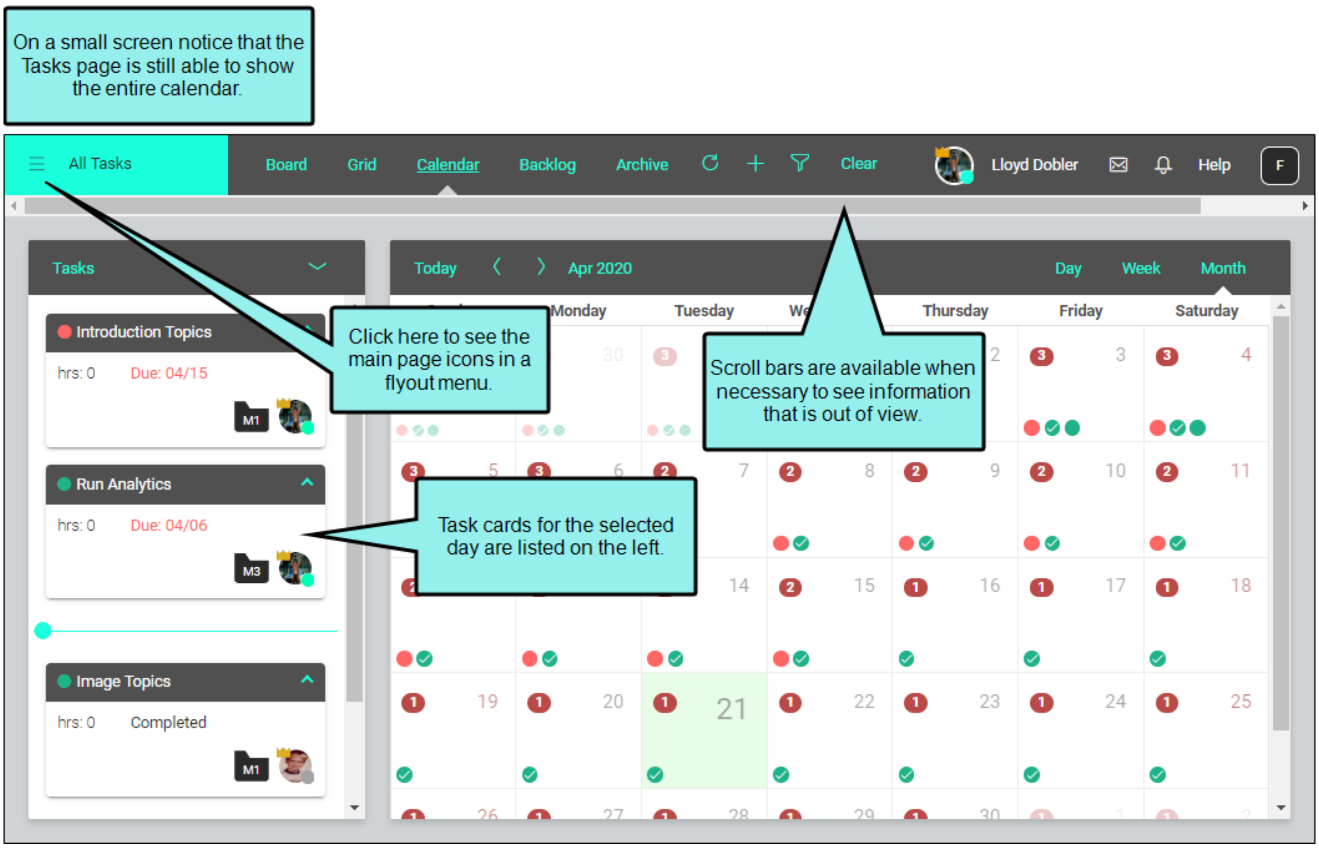


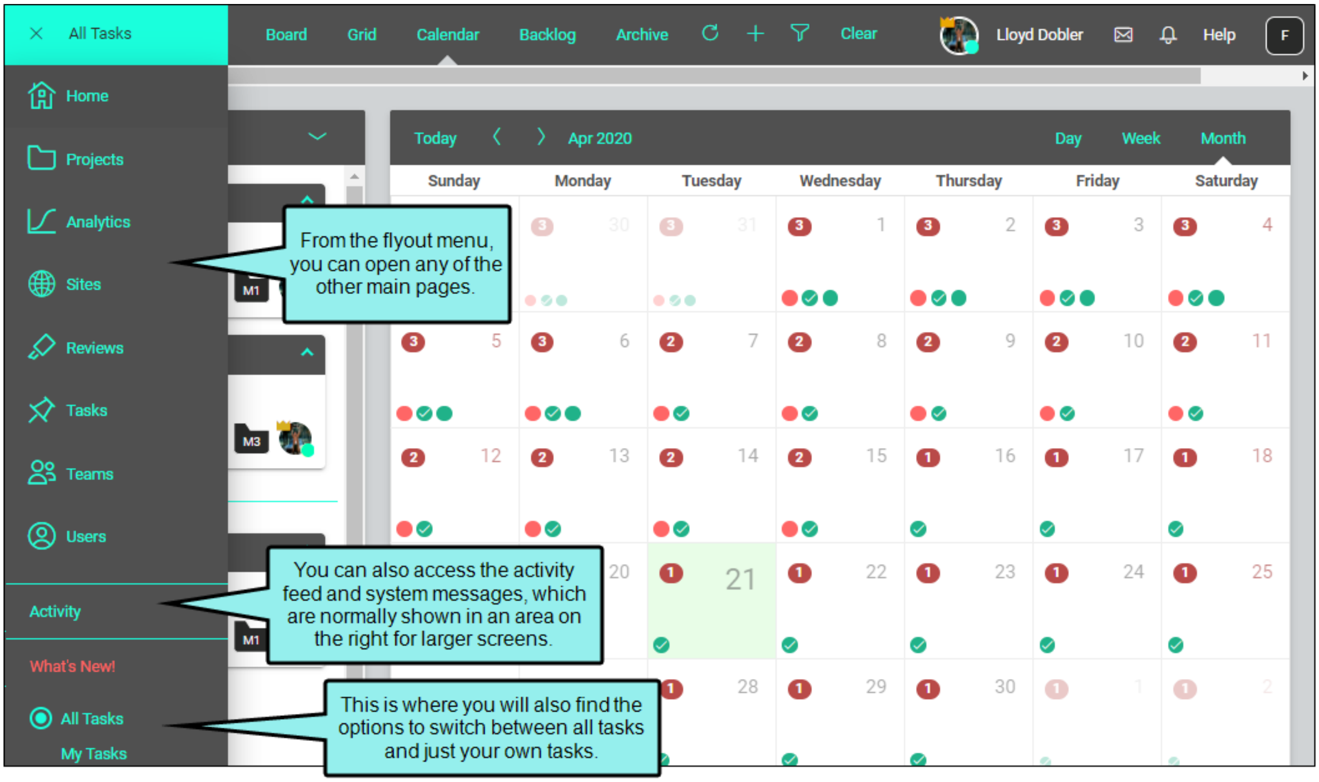

Users
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Name
Jeff Lebowski
Paul Stoecklein
Now that one or more rows have been selected, the options above are enabled.

Responsive Interface

The Central interface is responsive, which means that the elements of the workspace shift automatically when you move from a large screen to a smaller one, or from a high-resolution monitor to a low-resolution display.

If you are working on a small screen or at a low resolution, you will notice that the main navigation and some elements are moved into a flyout pane, which you can open by clicking ☰ in the upper-left corner. This leaves the primary areas of focus in view, but also makes other options easily accessible.

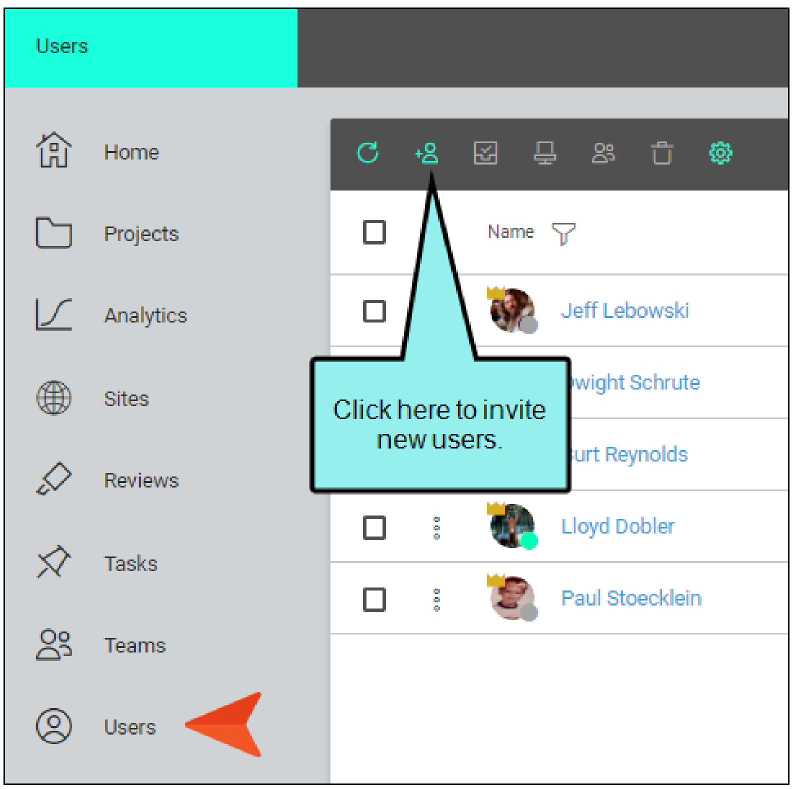



All Tasks
Board
Grid
Calendar
Backlog
Archive
Clear
Lloyd Dobler
Help
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Activity
What's New!
All Tasks
My Tasks
Today
Apr 2020
Day
Week
Month
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
From the flyout menu, you can open any of the other main pages.
You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
This is where you will also find the options to switch between all tasks and just your own tasks.

CHAPTER 3

Users and Permissions

The first person to log in to MadCap Central using your company's license has "User Administration" permission. From the Users page, this person can invite other individuals to join the license.

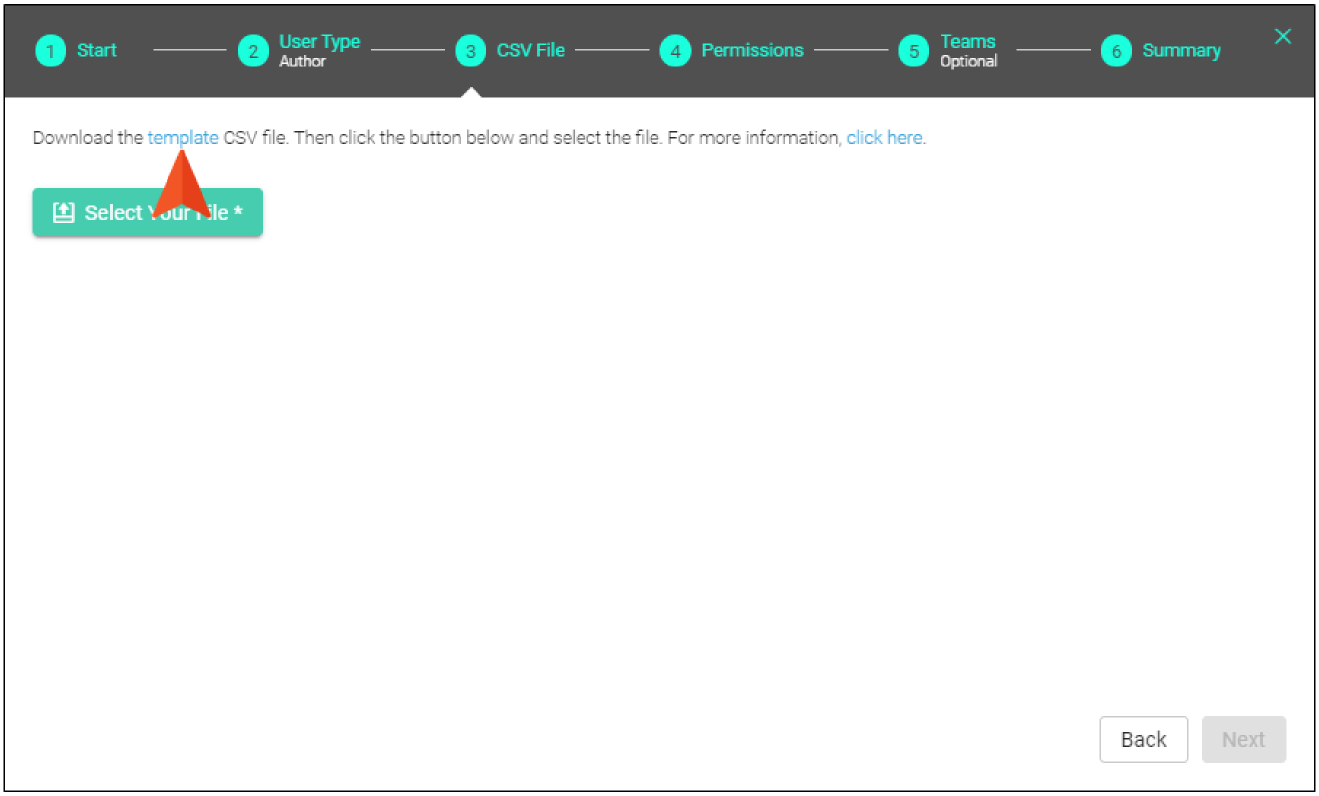


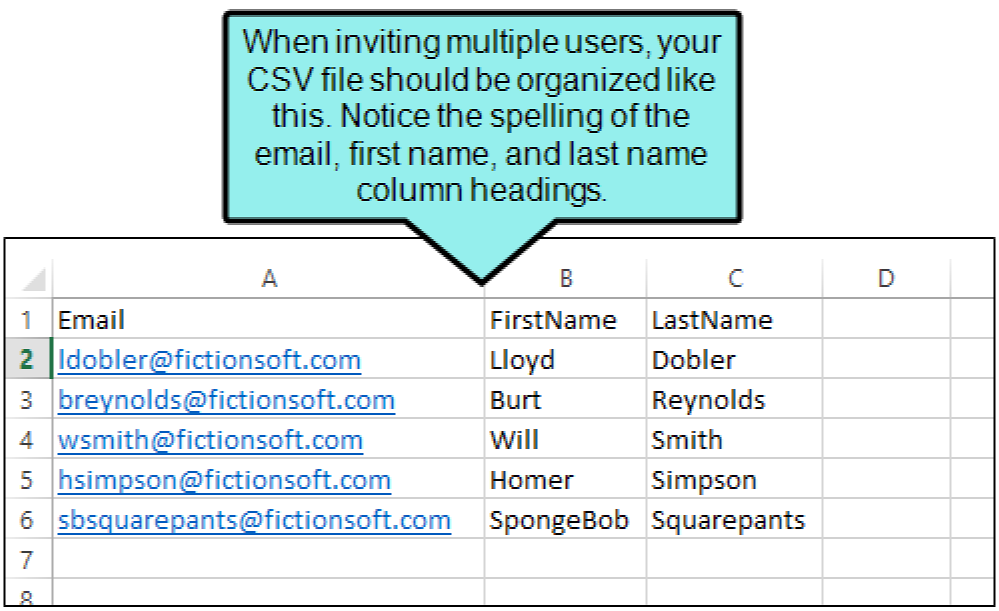
You can add multiple kinds of users.

- **Author** An author is an individual who works in projects, creating and editing content. This person can also be the "owner" of a review when they send topics and snippets that need to be reviewed by others. Owners can assign other reviewers with the author seat type and permission to manage reviews. Authors can monitor reviews, access grids for information and progress, and create review packages directly in Central. Along with the reviewers, the author can open and edit files in the Review Editor. Authors with the appropriate permissions can send a project out for translation. They can also create and edit content in Central via the project Files page.
- **Subject Matter Expert** A subject matter expert (SME) is an individual whose main purpose in Central is to review topics and/or snippets sent by an author. Therefore, a SME only sees the parts of the Central user interface that are necessary for reviews.
- **Viewer** A viewer is an individual whose only role is to view live private output. These users do not even need to belong to your company. However, they must set up a Central password; not to access Central itself, but to see live private outputs with which they are associated. Viewers can also see live output that is not set as private, just as anyone in the general public can. So if you do not need private output, you do not need to invite viewers to the license.

> NOTE A person who has the author user type can function as either the owner (i.e., original author) or a reviewer during the review process.

You can invite users one at a time or in bulk by pointing to a CSV file containing each person's email, first name, then last name. If you do not yet have a CSV file, you can download a template from Central and complete it with your users' details.



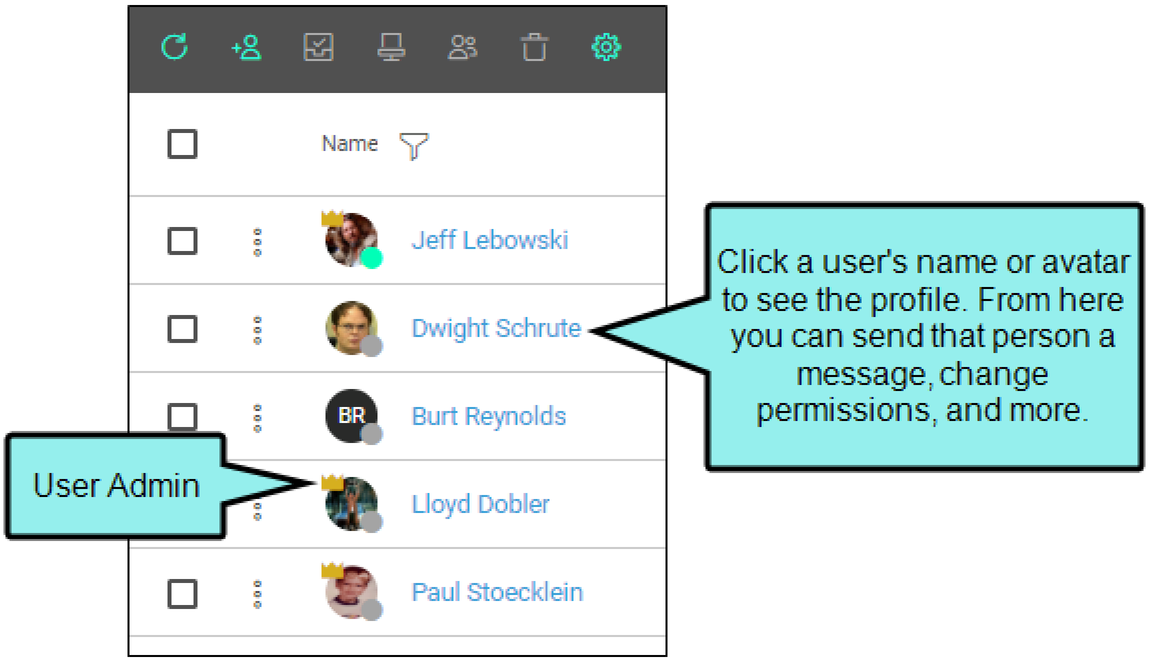


	A	B	C	D
1	Email	FirstName	LastName	
2	ldobler@fictionsoft.com	Lloyd	Dobler	
3	breynolds@fictionsoft.com	Burt	Reynolds	
4	wsmith@fictionsoft.com	Will	Smith	
5	hsimpson@fictionsoft.com	Homer	Simpson	
6	sbsquarepants@fictionsoft.com	SpongeBob	Squarepants	
7				
8				

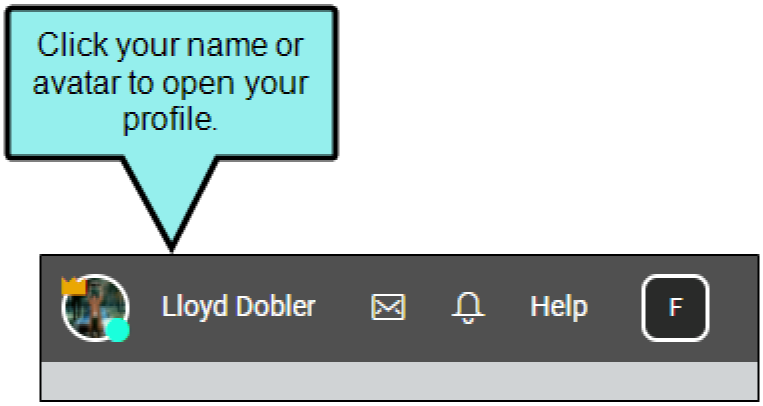
A person with "User Administration" rights can assign permissions to other users (authors only, not SMEs or viewers). Some users might receive only basic permissions, while others might be granted higher administrative rights.

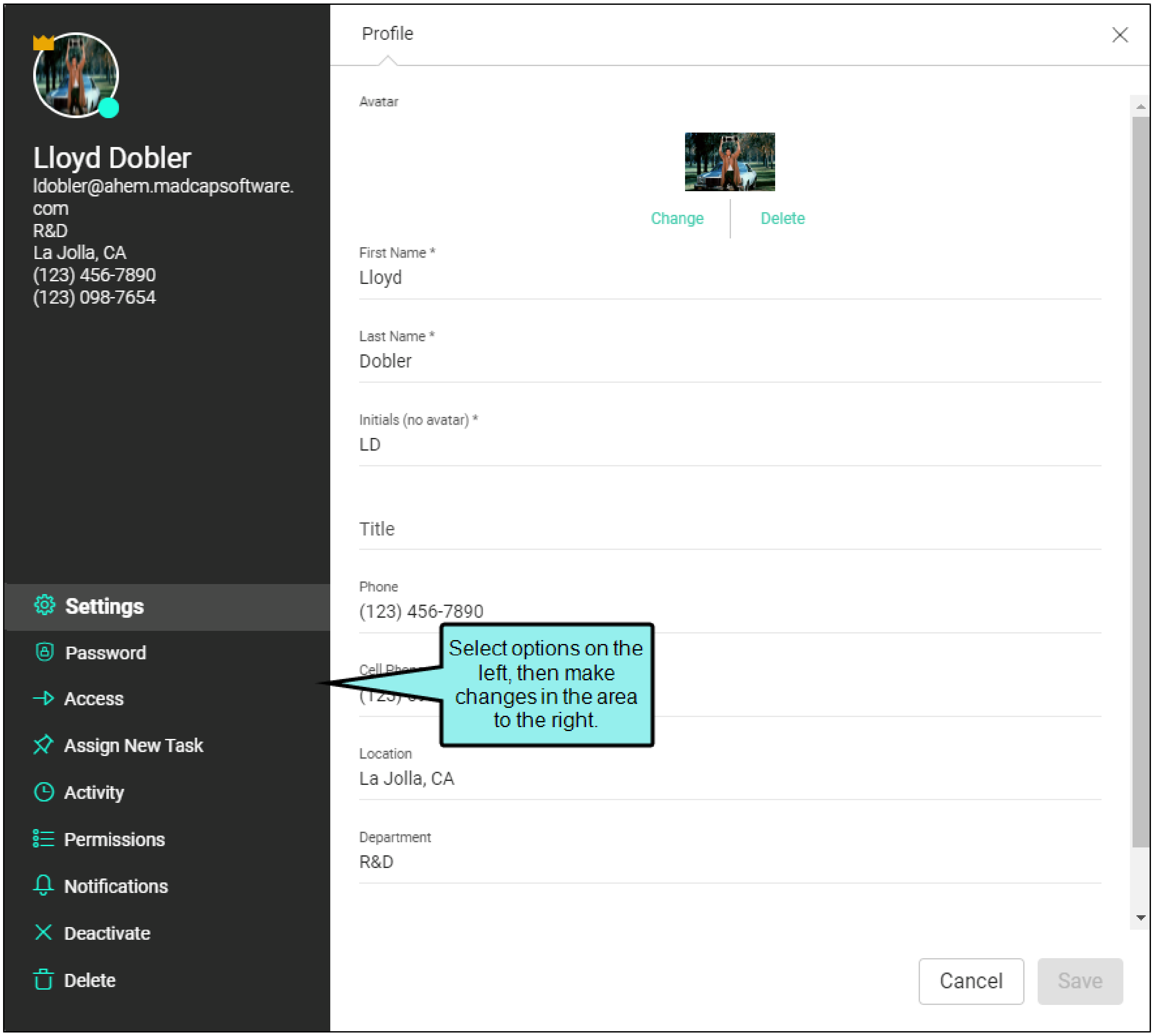
When a new user is invited, that person receives an email. The individual must click a link to complete the invitation to Central. This allows the user to confirm or edit his or her name, and set up a password. After the user submits the information, the account is activated.

From the Users page, you can see all other users in the system, view their profiles, and contact them. Users with a crown icon have "User Administration" permission.



If you click your avatar or name at the top of the interface, your profile opens.



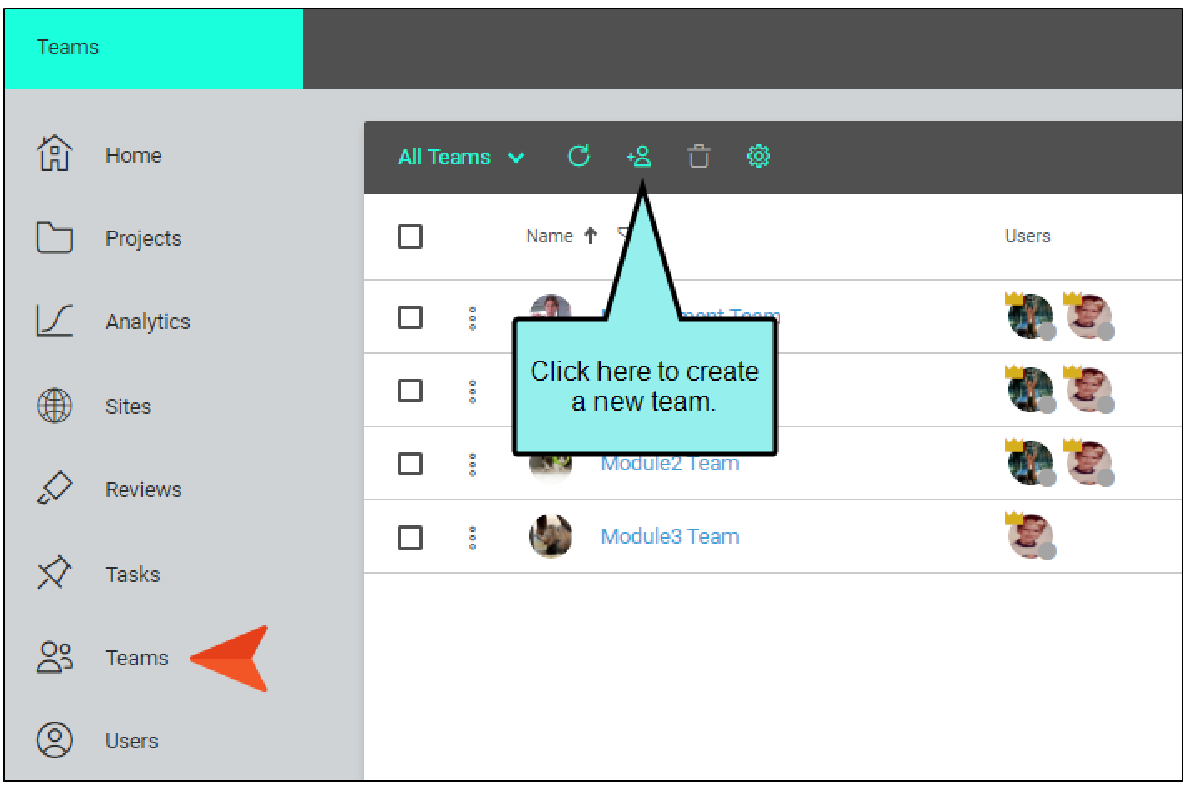


NOTE The notifications feature is available for author user types only, not for SMEs or viewers.

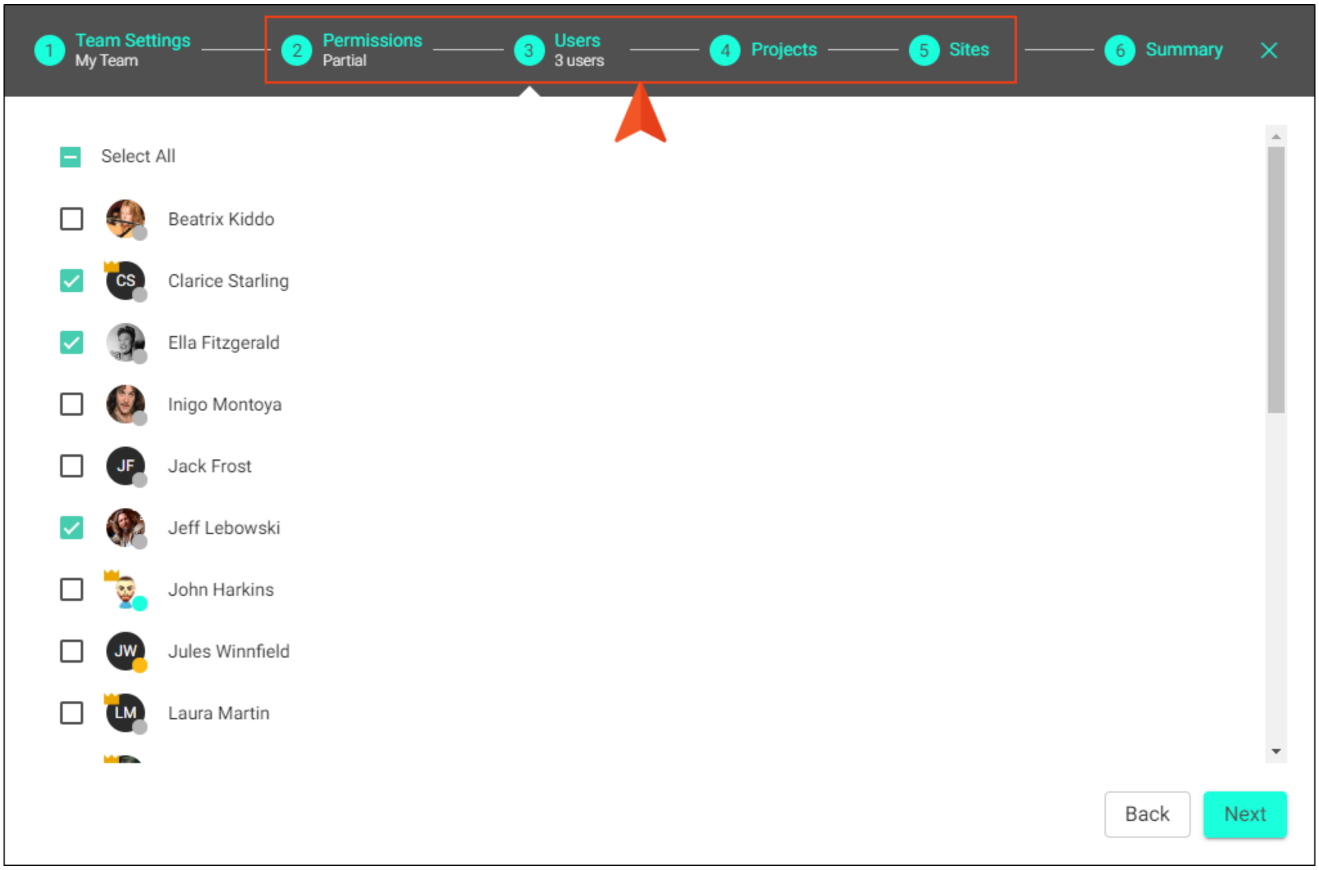
CHAPTER 4

Teams

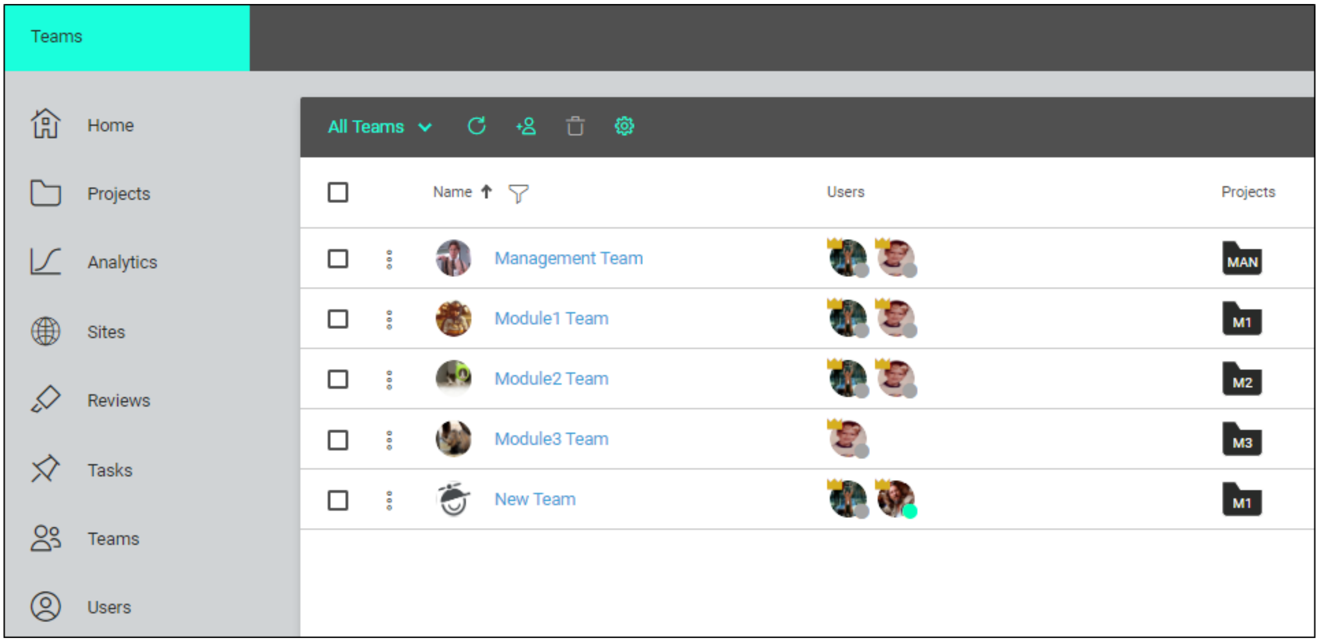
The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects, as well as to give users permissions on the license. Teams are also important if you produce private output, because only members of a team that is associated with the private site can view that output.



Not only can you associate specific users with a team, but you can also link teams to projects and sites. You can also set permissions for authors who you've added to the team.



After teams are created, you can see the users and projects associated with each one.



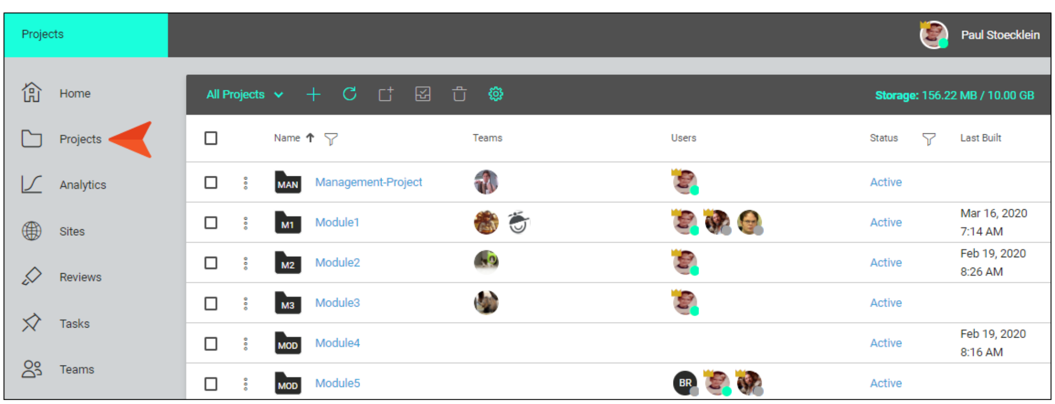
CHAPTER 5

Projects and Builds

The Projects page displays a grid, which lists all projects that have been created in Central or uploaded to your Central license. Creating a project using Central's UI is a convenient way to make basic projects in the cloud. Users associated with the project can always import it later from Central to Flare if more advanced features are needed.

Uploaded projects are copies of the local projects located on users' desktops. Some reasons to upload (i.e., bind) projects to Central, are the following: (1) You can let Central build and host your output, which means you can publish without having to involve an IT department; (2) the connection between your local project files in Flare and the cloned files on Central can be used as a source control solution, with branching integrated in various places in Central; and (3) you can use Central as a platform for topic reviews.

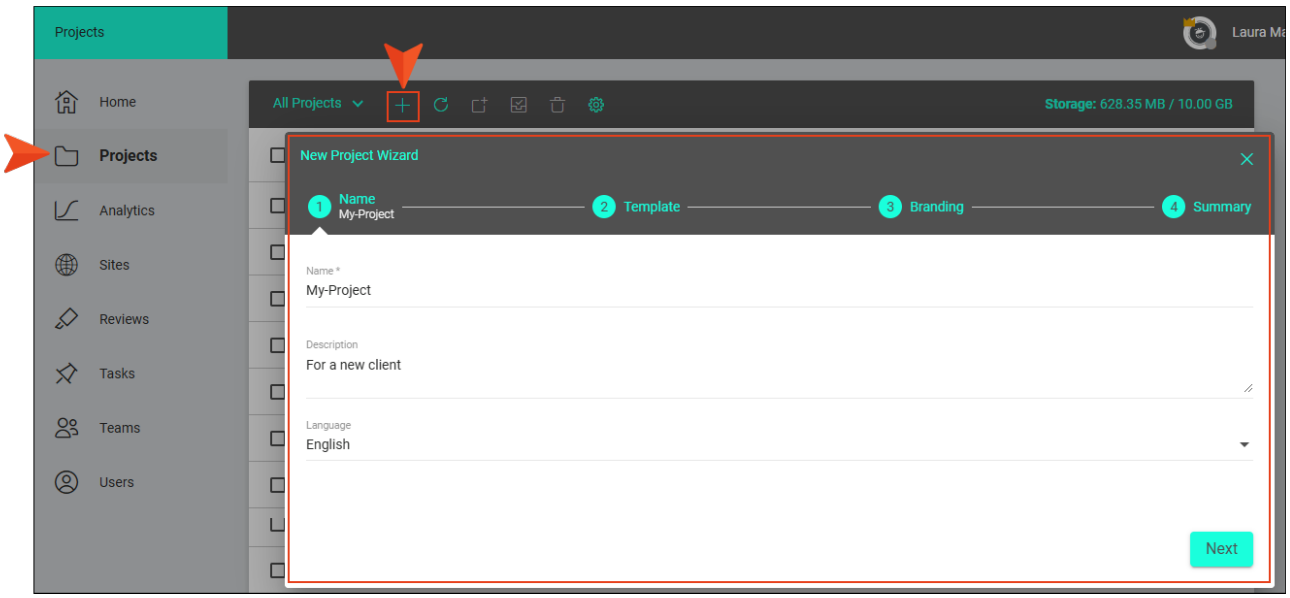
Regardless of whether you create a project in Central or upload it, you can do the following: (1) author, add, and edit project files directly in Central, with the ability to tap into the power of ChatGPT; (2) manage progress on topic development by using checklists; and (3) create a translation branch, using MadTranslations or a third-party language service provider to get translations done.



This chapter discusses the following:

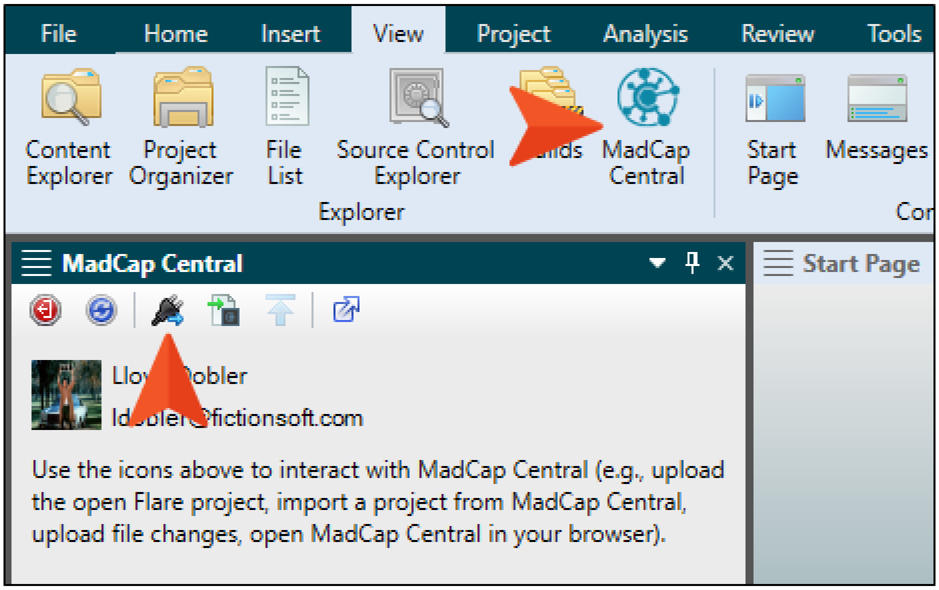
Creating Projects

You can create projects from scratch directly in Central; eliminating the need to interact with the Flare desktop application. This centralized workflow is ideal for basic projects, or for keeping project management simple.



Uploading Projects

You do not upload projects from within Central. Instead, you do this from the desktop project itself, using a recent version of Flare that supports it.

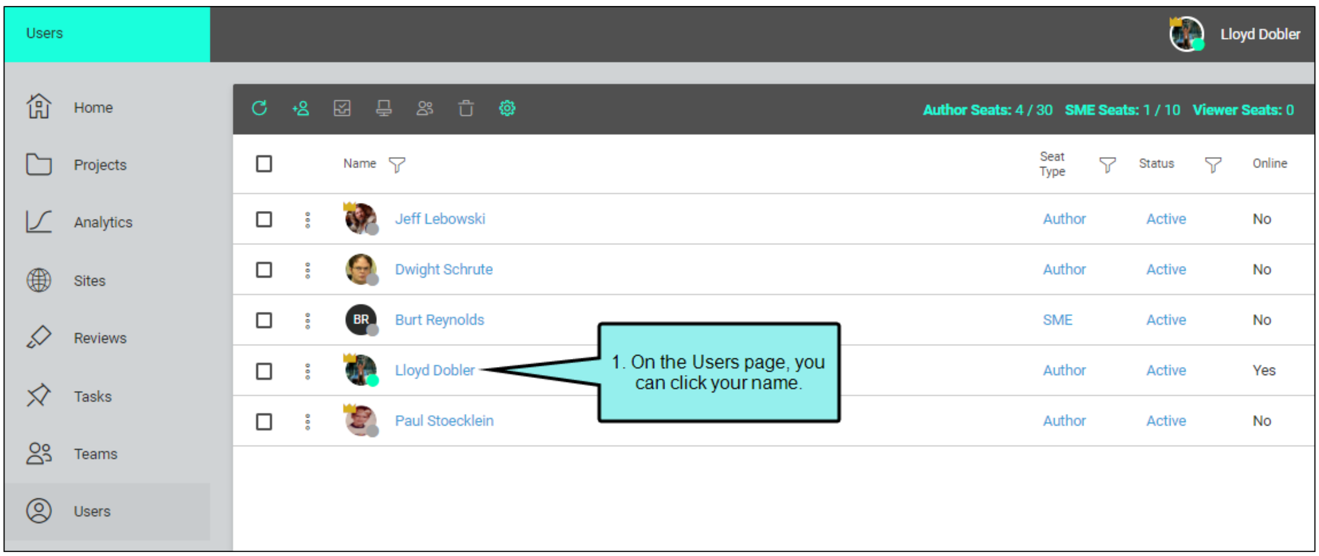


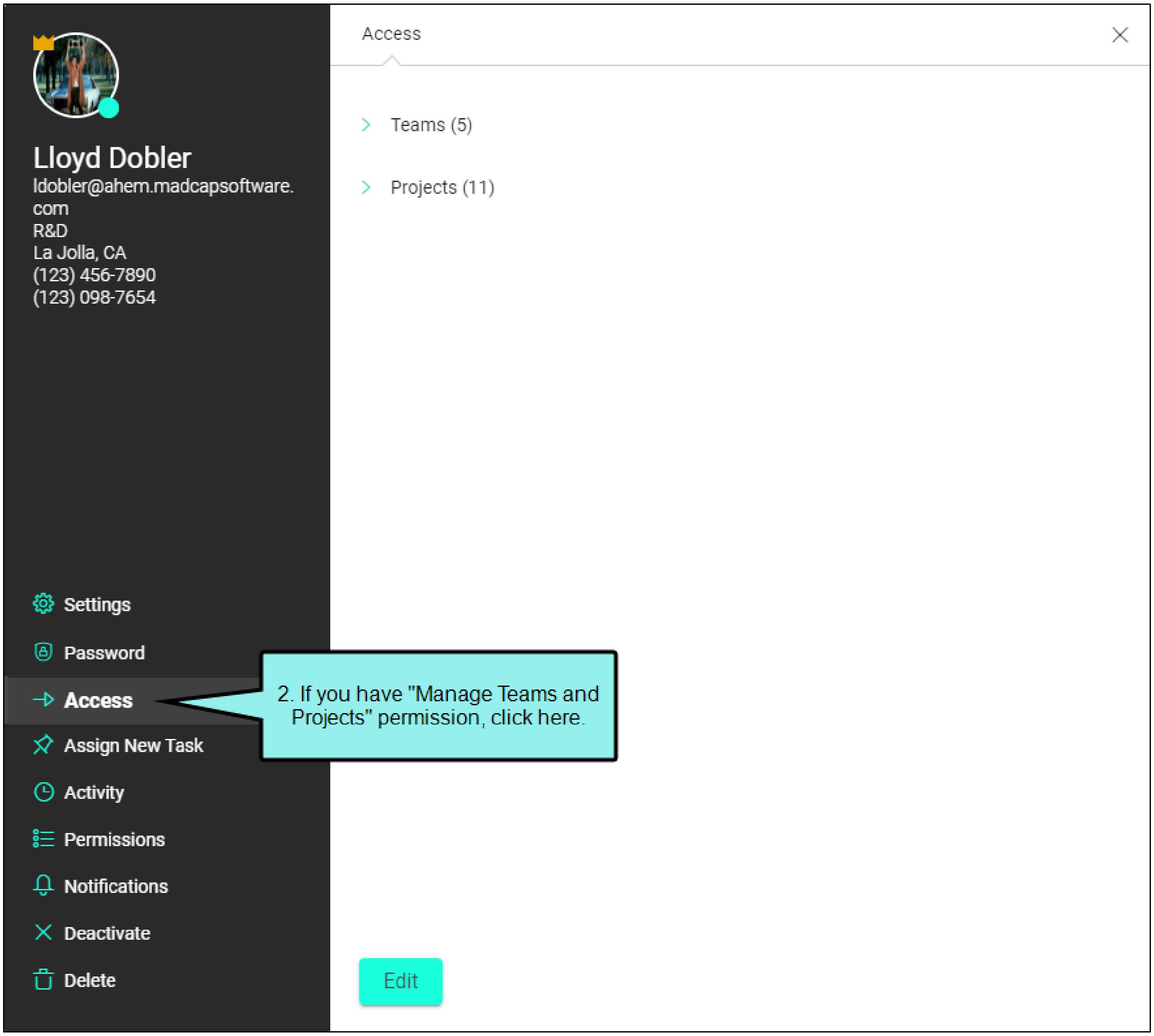
IMPORTANT Central is not a replacement for your desktop Flare application. You continue to author your project content locally in Flare. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project on Central. If you are working in a dual-bound model, you use your normal (third-party) source control tool to synchronize your files and then use Flare to push those changes to Central. Whichever method you use, this ensures that your files are up-to-date in Central before you build output.

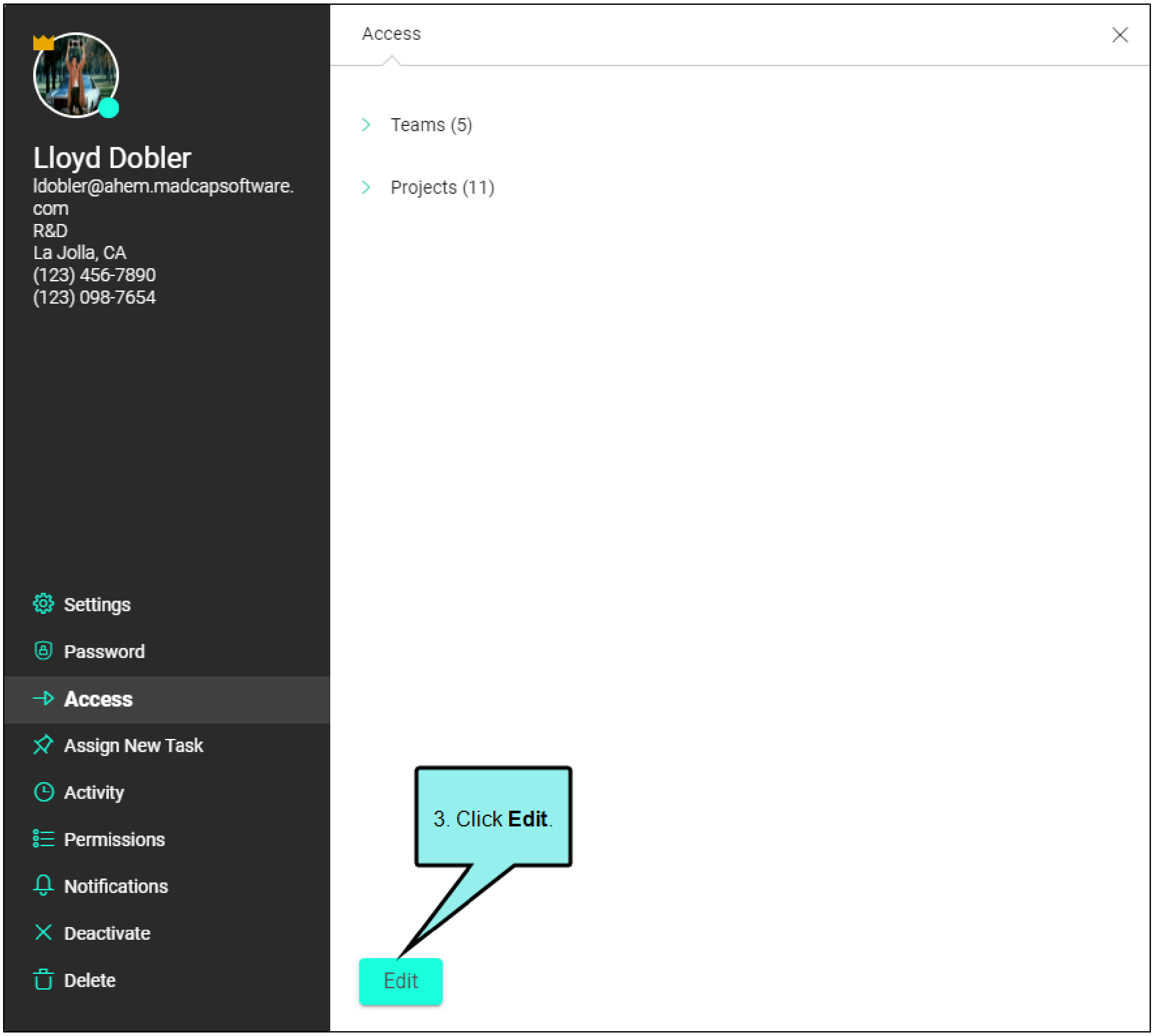
NOTE When you upload a project to Central, the files are connected to Central via an integrated source control system (Git). Your interaction with source control can follow one of two models—single-bound (recommended) or dual-bound. For more information, see the online Help or the *Projects and Builds Guide*.

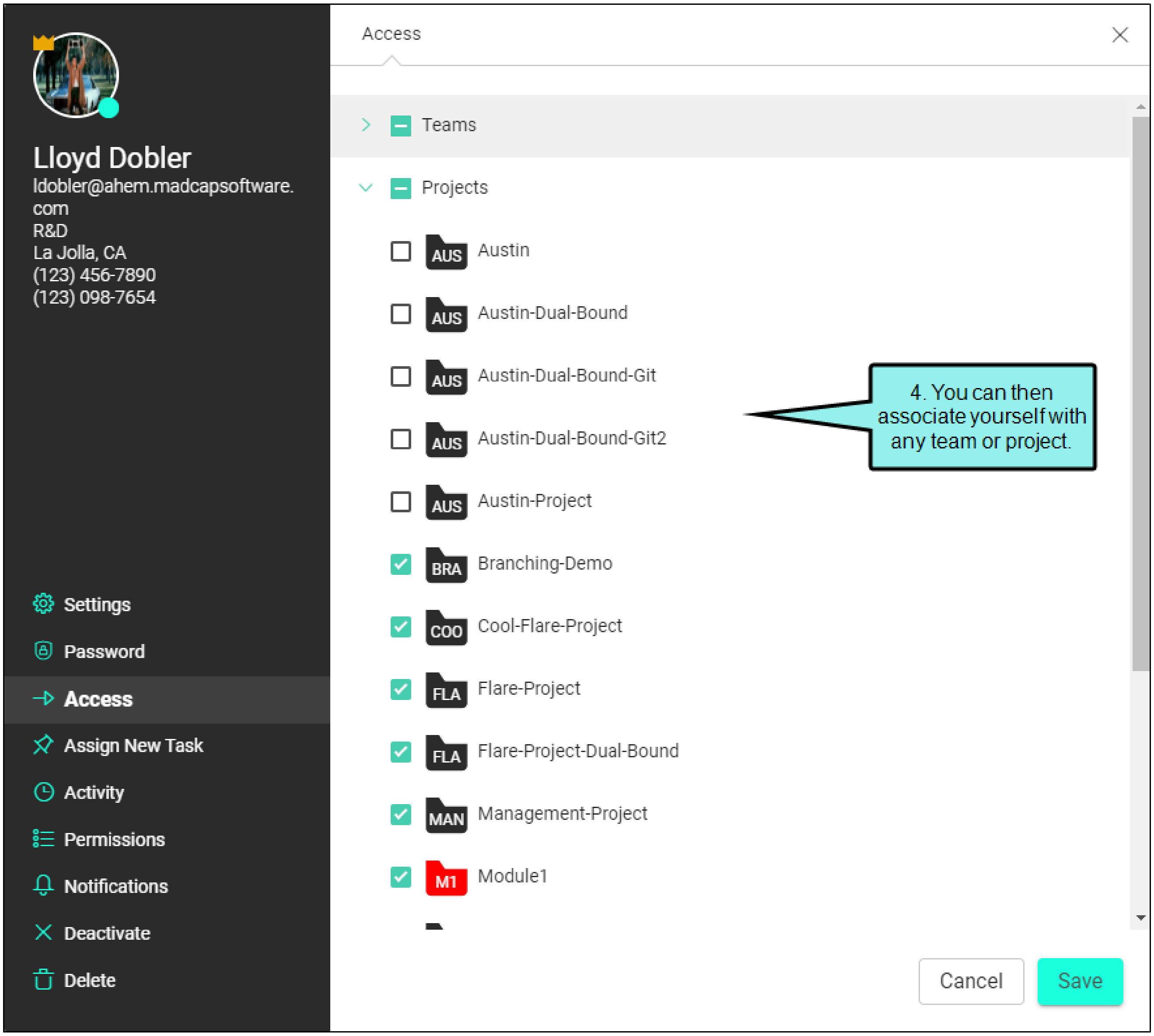
Associating Users With Projects

All users can see all the projects listed in the grid on the Projects page. However, to open a project (by clicking on its name) or take action on it, you must be associated with that project. There are a few ways to become associated with a project. First, you can upload a project to Central yourself. Second, another user can add you to his or her project. Third, if you have "Manage Teams and Projects" permission, you can open your profile and add yourself to a project. And fourth, if another user sends files from a project for you to review, you will automatically become associated with that project.




Lloyd Dobler
ldobler@ahem.madcapsoftware.com
R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654
Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Access
Teams (5)
Projects (11)
Edit
2. If you have "Manage Teams and Projects" permission, click here.


Lloyd Dobler
ldobler@ahem.madcapsoftware.com
R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654
Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Access
Teams (5)
Projects (11)
3. Click **Edit**.
Edit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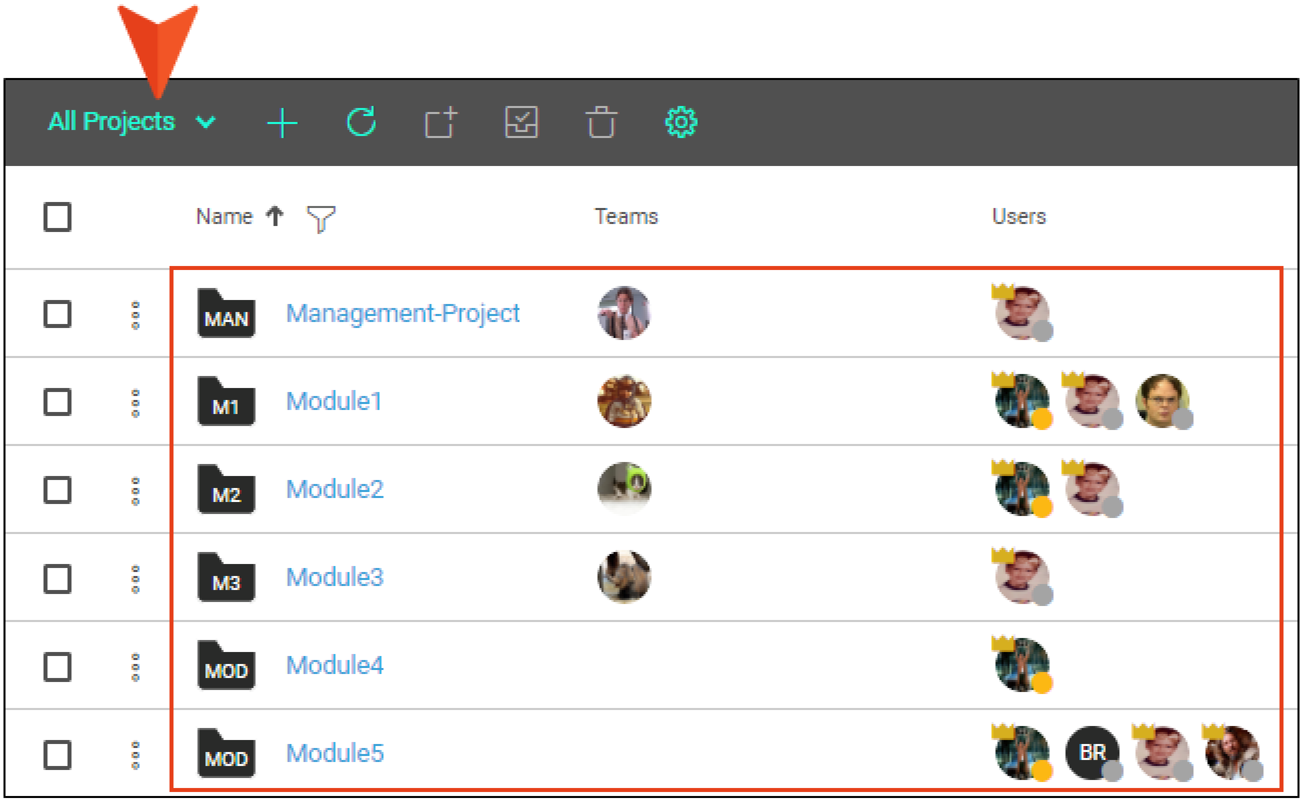
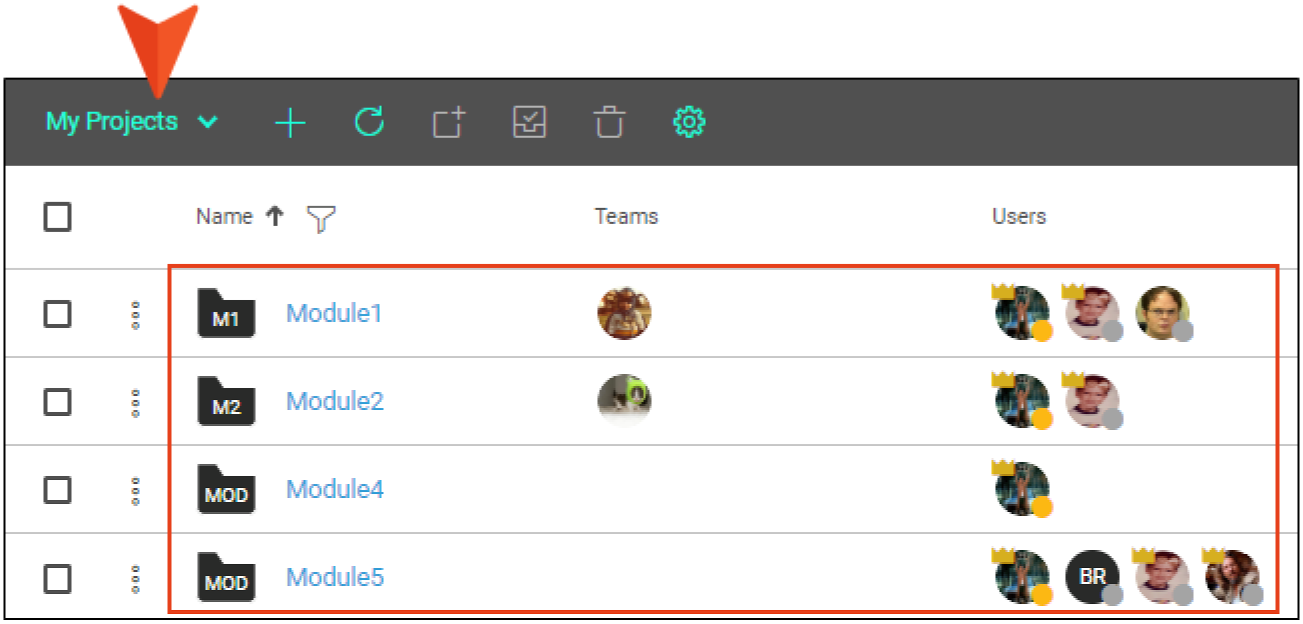
ldobler@ahem.madcapsoftware.com
R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654
Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Access
Teams
Projects
AUS Austin
AUS Austin-Dual-Bound
AUS Austin-Dual-Bound-Git
AUS Austin-Dual-Bound-Git2
AUS Austin-Project
BRA Branching-Demo
COO Cool-Flare-Project
FLA Flare-Project
FLA Flare-Project-Dual-Bound
MAN Management-Project
M1 Module1
4. You can then associate yourself with any team or project.
Cancel
Save

There is also a drop-down on the Projects page that lets you switch between seeing all projects and only the projects you are associated with.

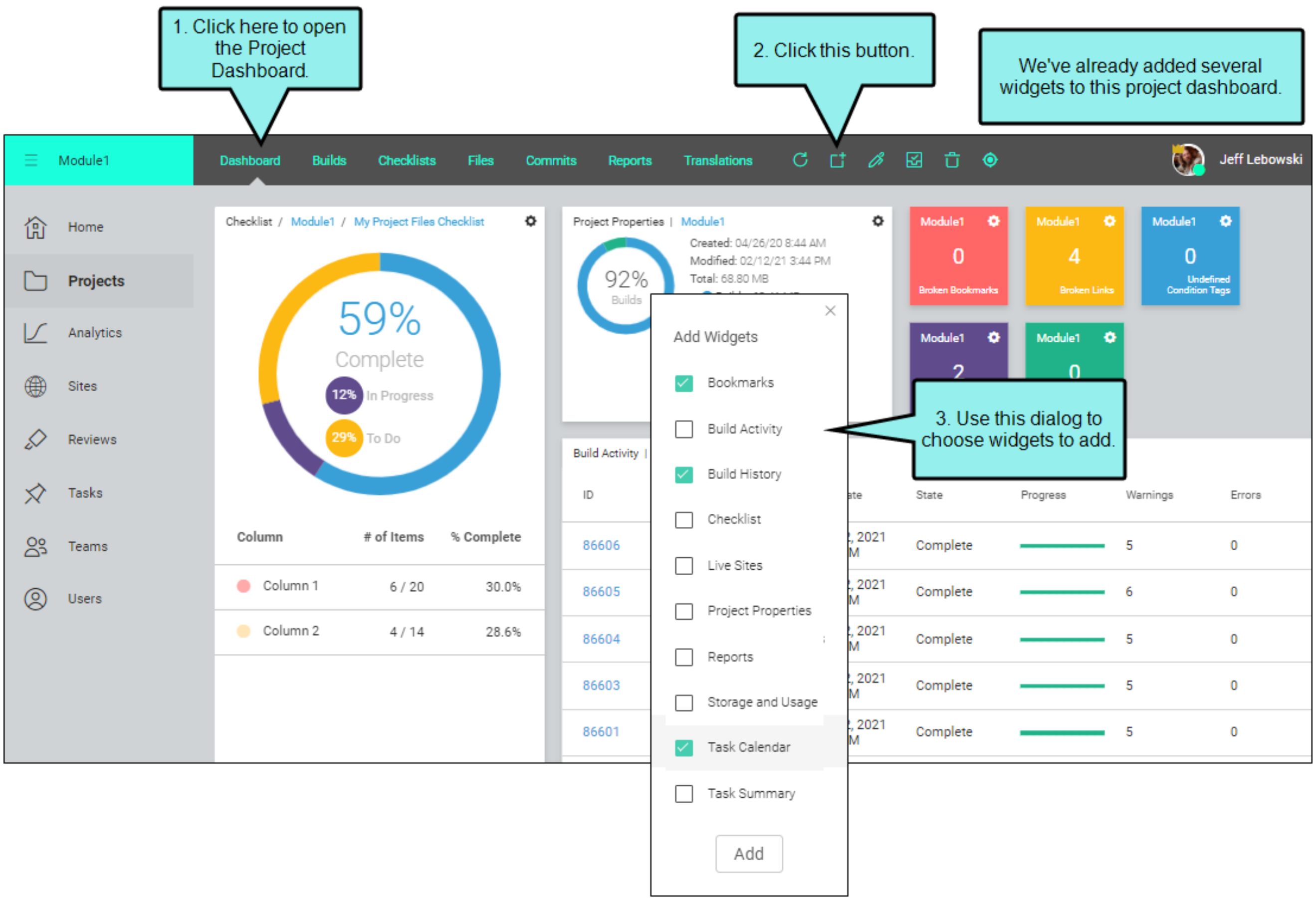



My Projects
Name
Teams
Users
M1
Module1
M2
Module2
MOD
Module4
MOD
Module5
BR

Project Dashboard

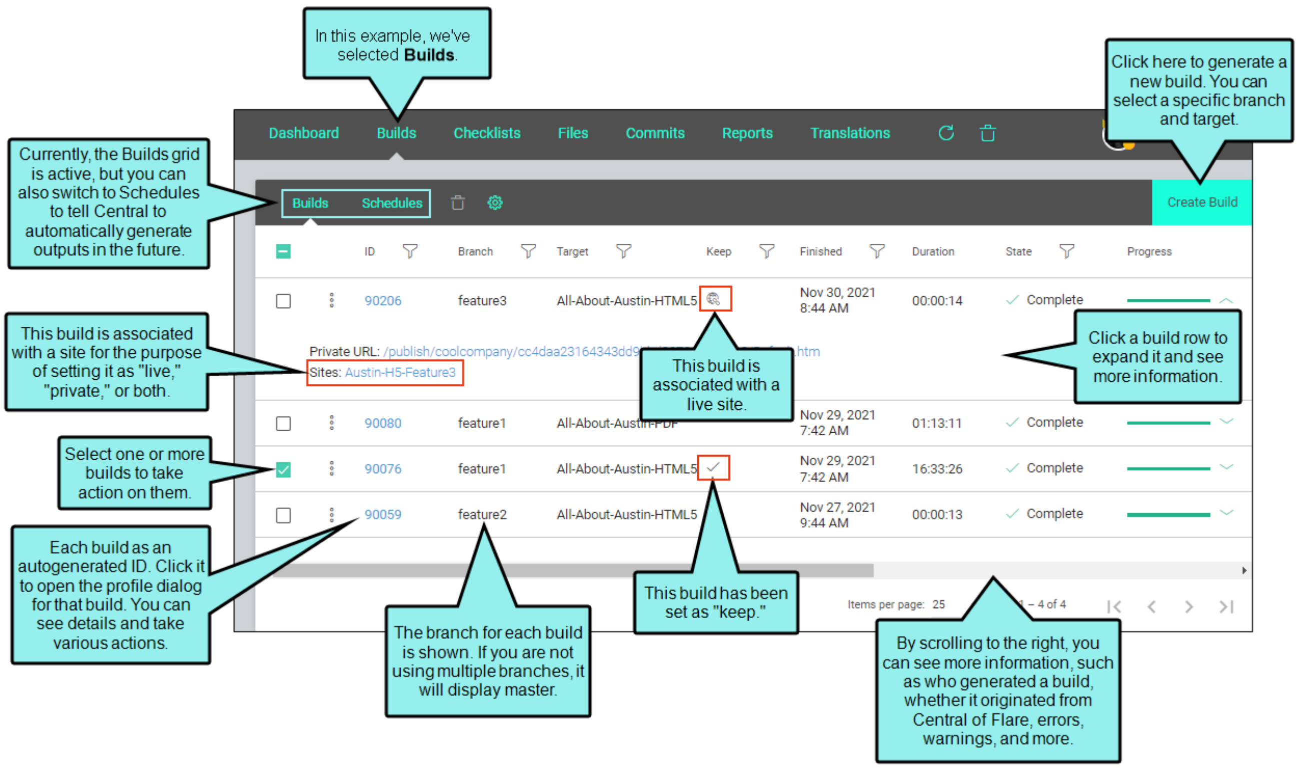
Once you are associated with a project in Central, you can open it from the main Projects page by clicking on the project name.

When you first open a project in Central, it displays by default in Dashboard view. As with your Home dashboard, it will be empty at first. You can populate each project dashboard with widgets that you find useful. See "Widgets" on page 64.



Builds

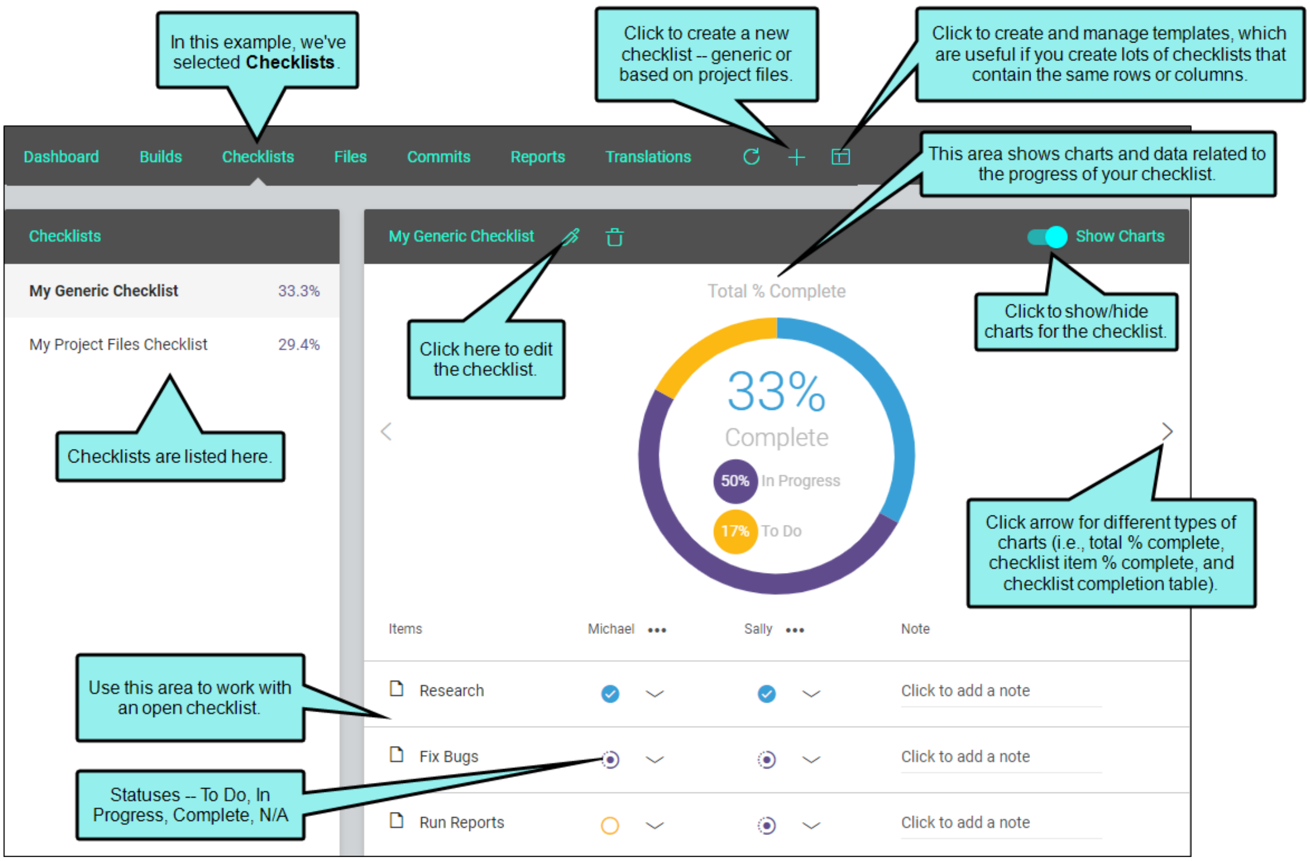
You can click **Builds** at the top of the interface to work with the targets in the project. The Builds view lets you generate, open, and manage output from a target. To set output as “live” (i.e., it can be viewed by the public) or configure domains (URLs), you can use the Sites page (see "Sites" on page 43).



Checklists

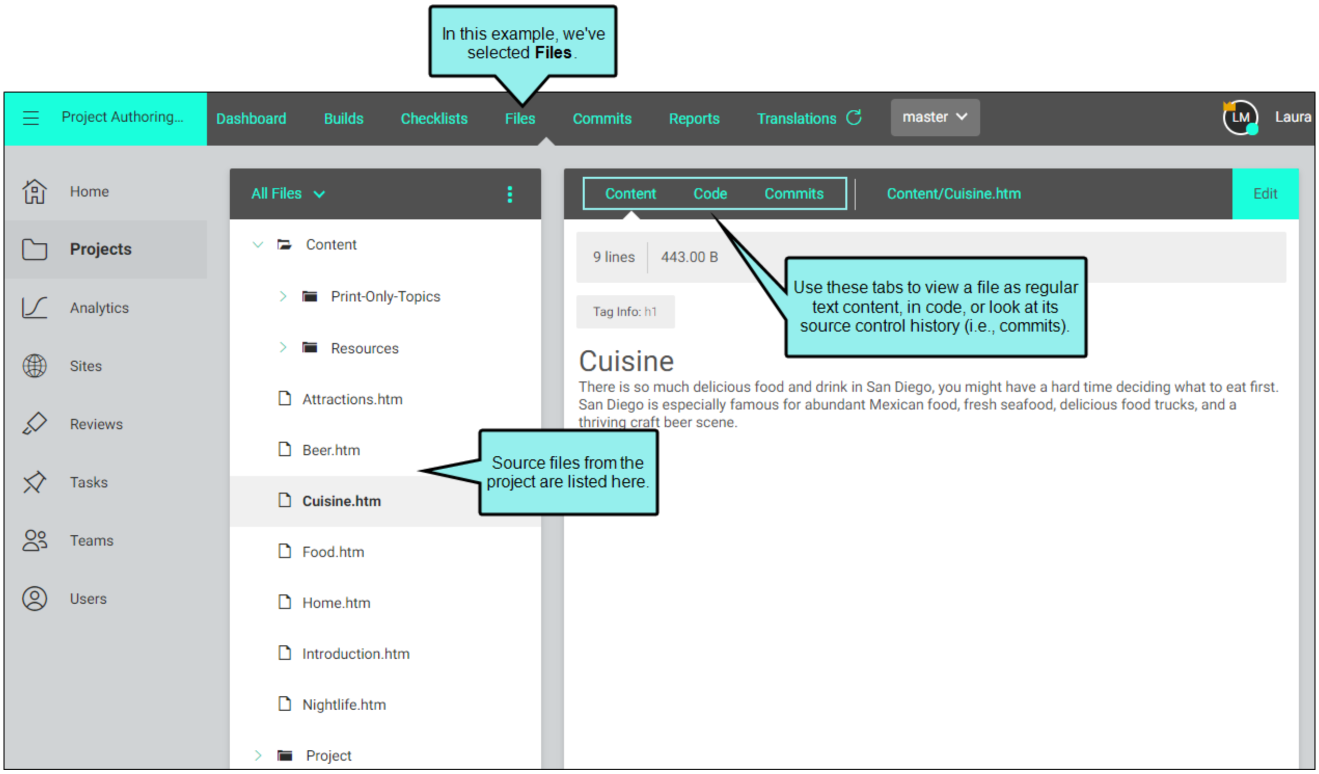
You can click **Checklists** at the top of the interface to create and manage checklists related to your project.

Checklists might have to do with specific files (e.g., topics) in your project. These are called "Project Files" checklists. You can create custom columns for whatever types of activity you want to track for each file, and you can use a note column for specific information about each row. Also, you can associate a Project Files checklist with a specific branch. which is helpful when tracking the progress of content that is in a state of development. Alternatively, you might create checklists for random things you need to accomplish, such as a product release "To Do" list. These are called "Generic" checklists, and they let you manually name each column and row. You can set the appropriate status on each item as you work. At the top of the interface you can select to show charts and percentages as you progress through the checklist.



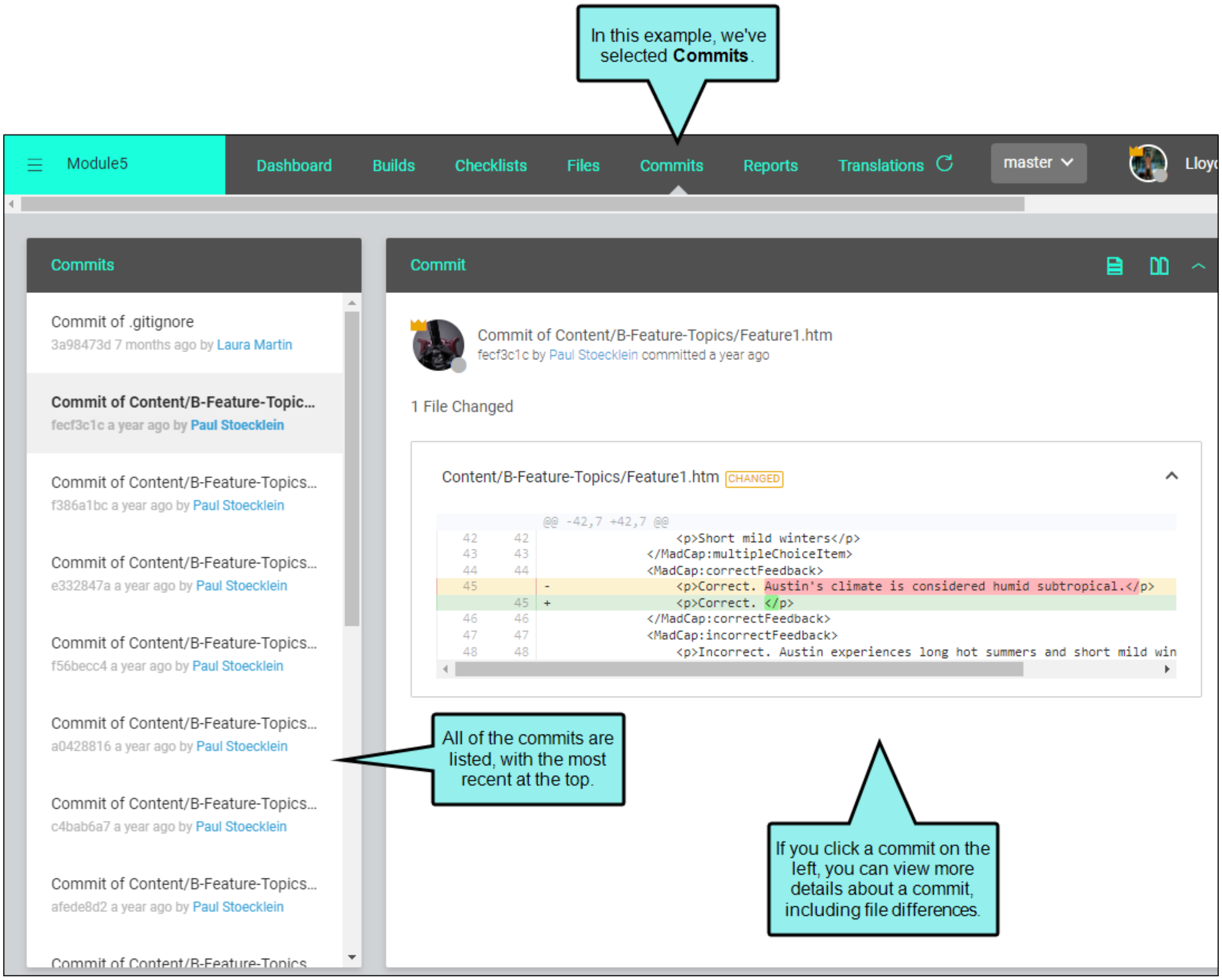
Files

You can click **Files** at the top of the interface to view, edit, and author files in your project.



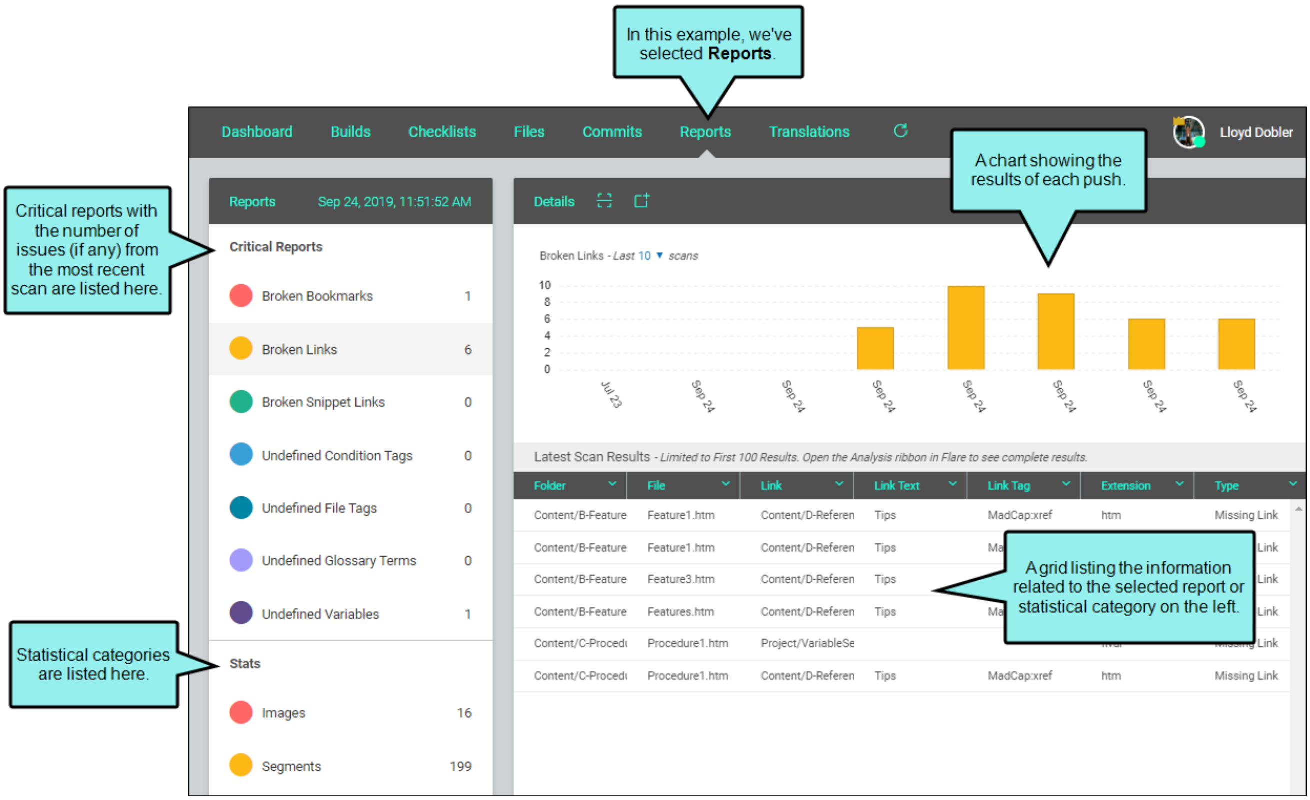
Commits

You can click **Commits** at the top of the interface to see details of all the source control changes that have taken place over time for the project.



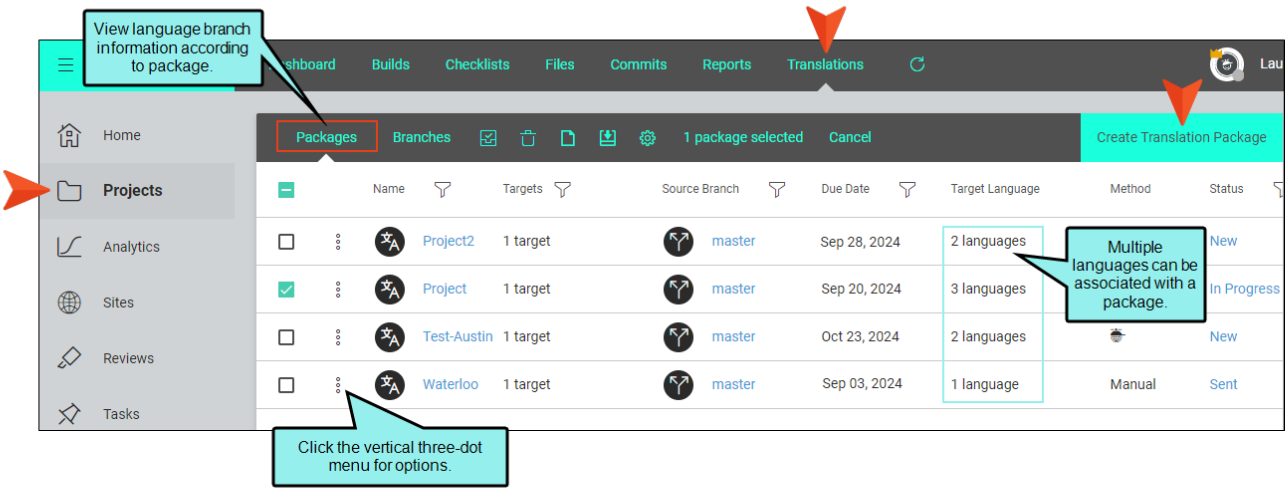
Reports

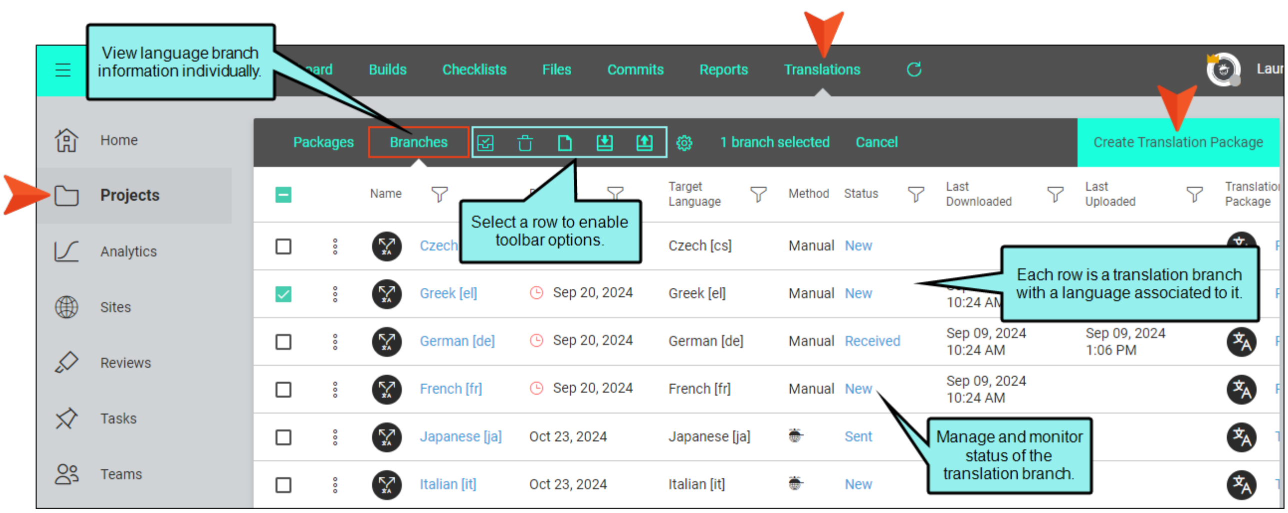
After opening a project in Central, you can click **Reports** at the top of the interface to see various types of reports and statistics. When you select a report or statistical category on the left, a chart and grid are populated on the right with details.



Translations

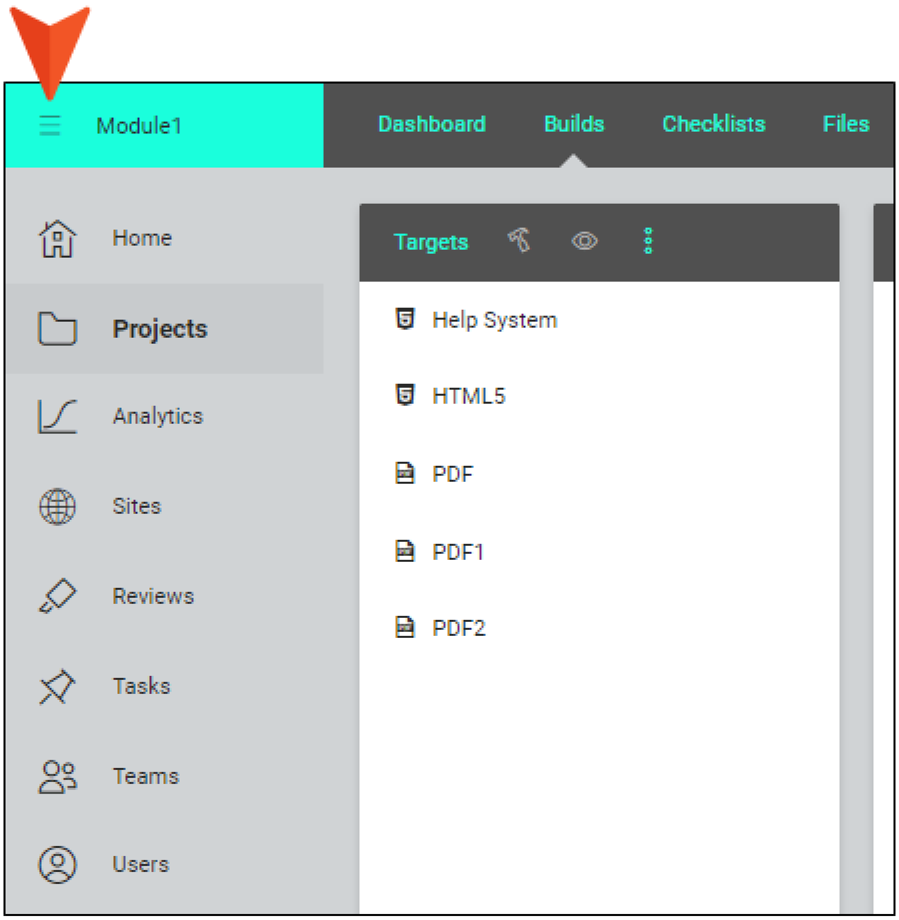
You can click **Translations** at the top of the interface to begin the translation process and to control your multilingual projects. The Translation page includes two grids, Packages and Branches. Functionally, the grids do the same things, but they each provide a different way to view the translation project.



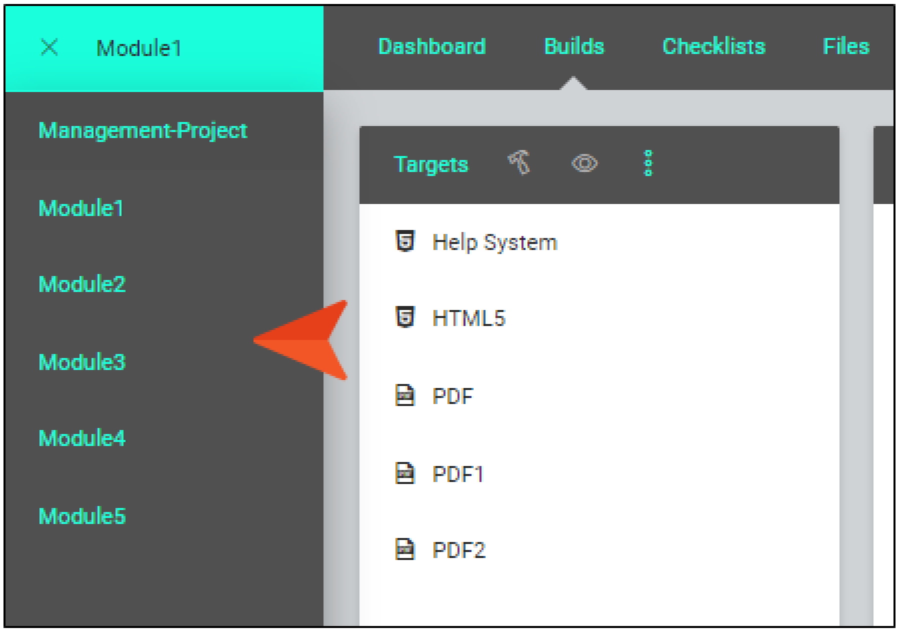


Accessing Other Projects

Once you've opened a project in Central, you can access a drop-down in the upper-left corner of the interface.



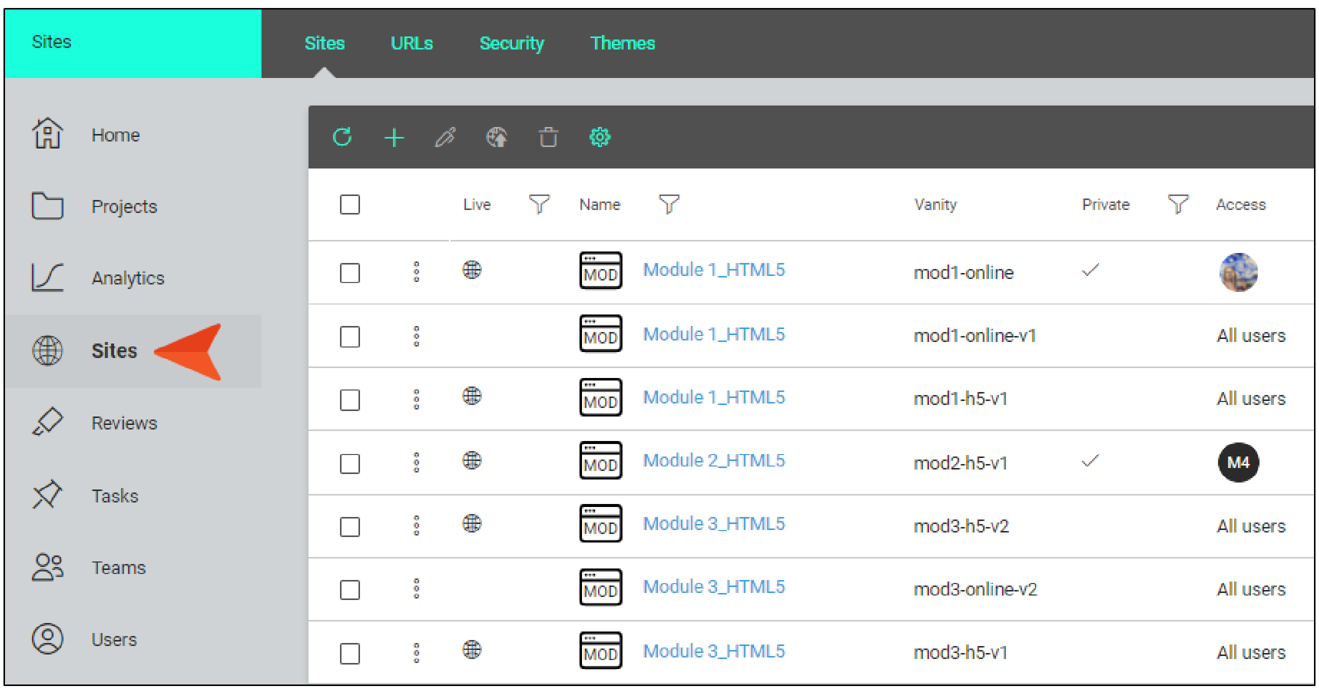
From this drop-down, you can quickly navigate to any other projects that you have permission to open. This is quicker than going back to the main Projects page grid to open another project.



CHAPTER 6

Sites

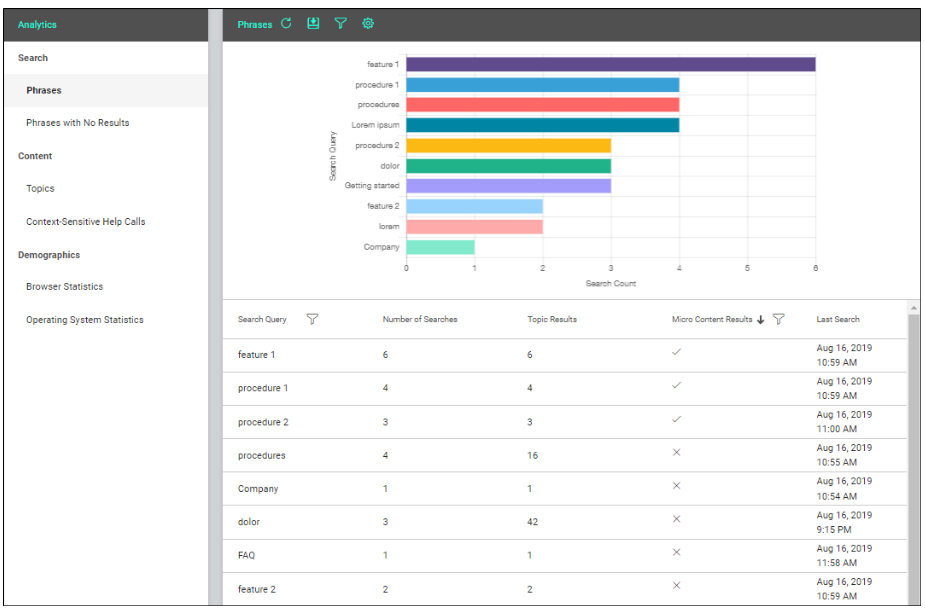
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Four page views are available: Sites, URLs, Security, Themes.



CHAPTER 7

Analytics

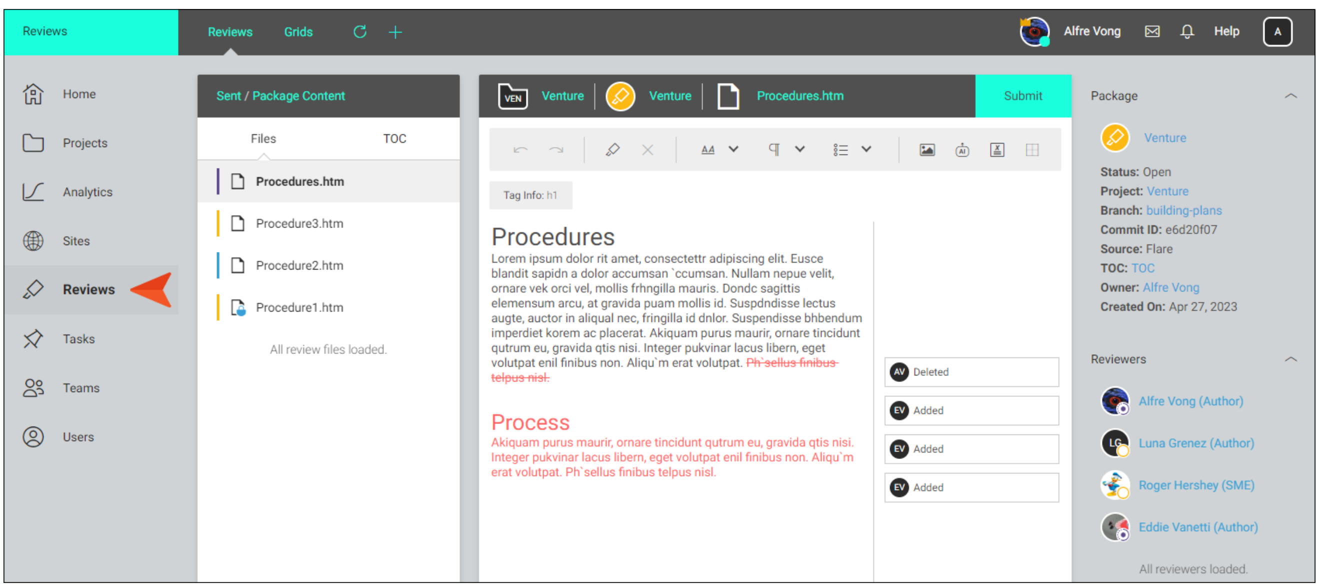
The Analytics page lets you view user activity on published HTML5 output. This includes search phrases used, search phrases with no results, topics viewed, context-sensitive Help calls, and demographic statistics (browsers and operating systems).

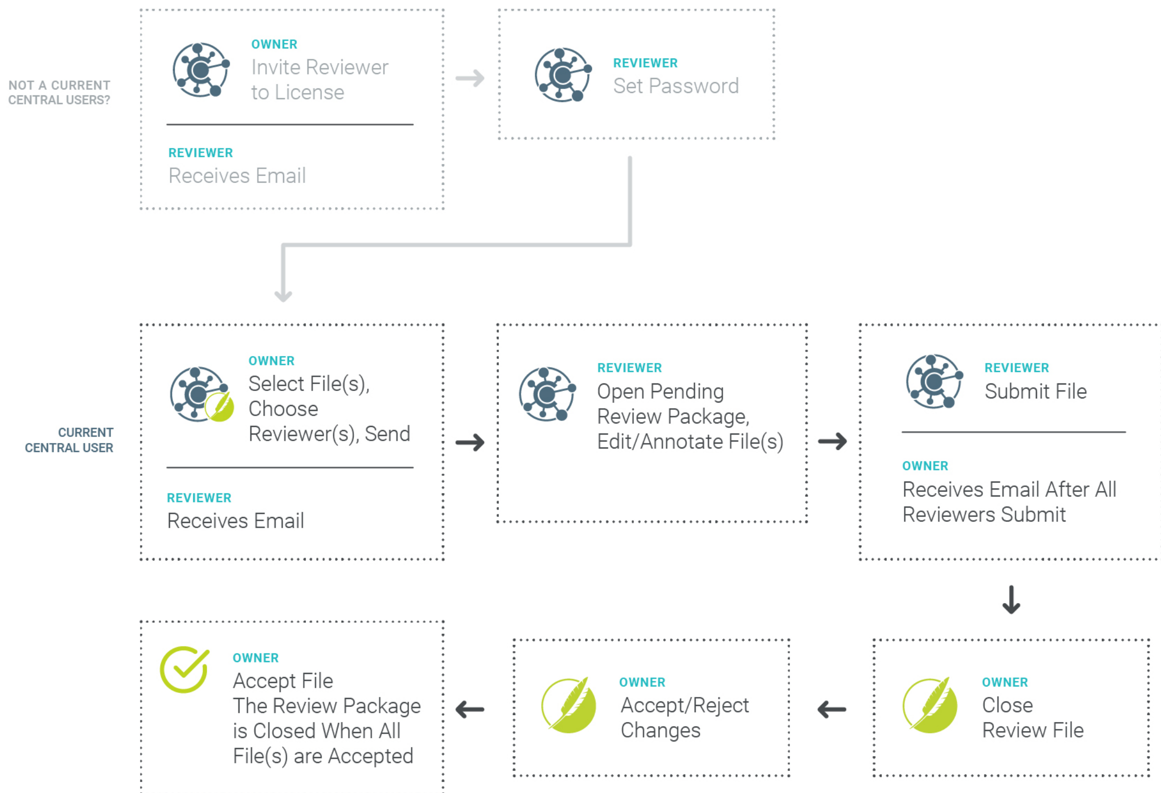


Analytics works on projects located in Central, or you can host output on your own servers. If you host the output outside of Central, you still need to use Central with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Central (e.g., not be behind a firewall).

Reviews

The Reviews page lets you view, edit, and manage review packages that have been sent for review on a particular branch. Bundling files in Flare enables monitoring the progress of a review and updating packages as needed in Central. The data grids for packages and files gives at-a-glance review package information such as recent activity, reviewers, status, and more. Those reviewing files in Central can see them in a contextual TOC view (i.e., assembled order of topics for output).




NOT A CURRENT CENTRAL USERS?
OWNER
Invite Reviewer to License
REVIEWER
Receives Email
REVIEWER
Set Password
CURRENT CENTRAL USER
OWNER
Select File(s), Choose Reviewer(s), Send
REVIEWER
Receives Email
REVIEWER
Open Pending Review Package, Edit/Annotate File(s)
REVIEWER
Submit File
OWNER
Receives Email After All Reviewers Submit
OWNER
Close Review File
OWNER
Accept/Reject Changes
OWNER
Accept File
The Review Package is Closed When All File(s) are Accepted

Benefits of this review workflow include:

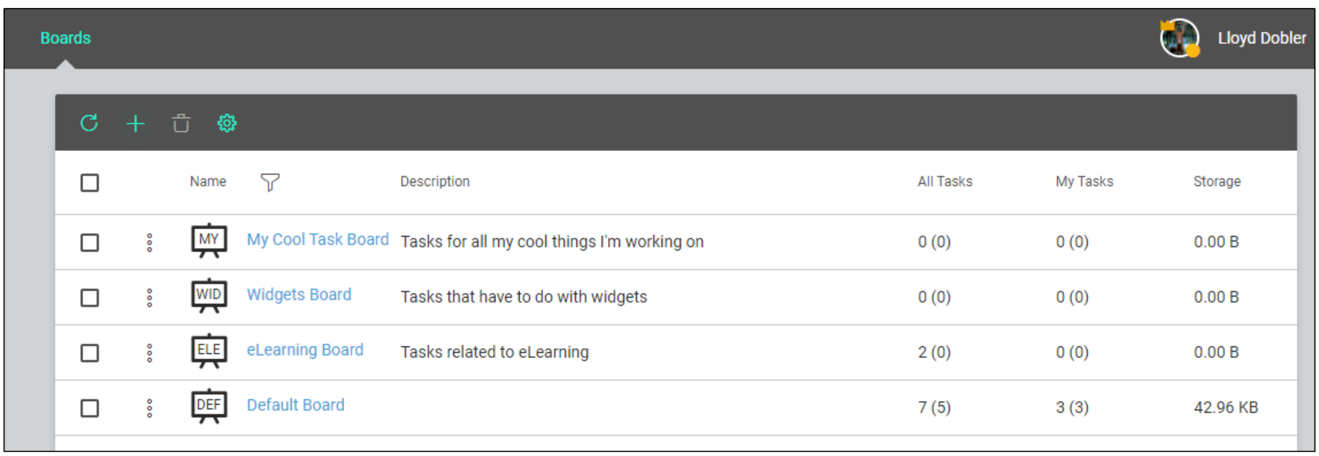
- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version of the editor means a streamlined interface. You only see options and features that are relevant to the review process.
- **Auto-Save and Tracking** Changes in the editor are auto-saved as you work. In addition, all changes are automatically tracked so the owner can easily locate edits for approval or rejection.
- **Branching** Files can be sent for review from a specific Git branch. This lets you keep reviews limited to files that are still in a state of development, as opposed to finished and ready for publication.
- **Workflow Management** Bundling files into review packages favorably services everyone in the review process workflow. Reviewers (e.g., SMEs) can edit and view content from a flat file list or from a contextual TOC view where files display in a TOC for output that an end user might see. Owners (e.g., authors) can edit but they can also monitor and manage reviews in Central. They have access to customizable package and file grids that show review information and progress.

CHAPTER 9

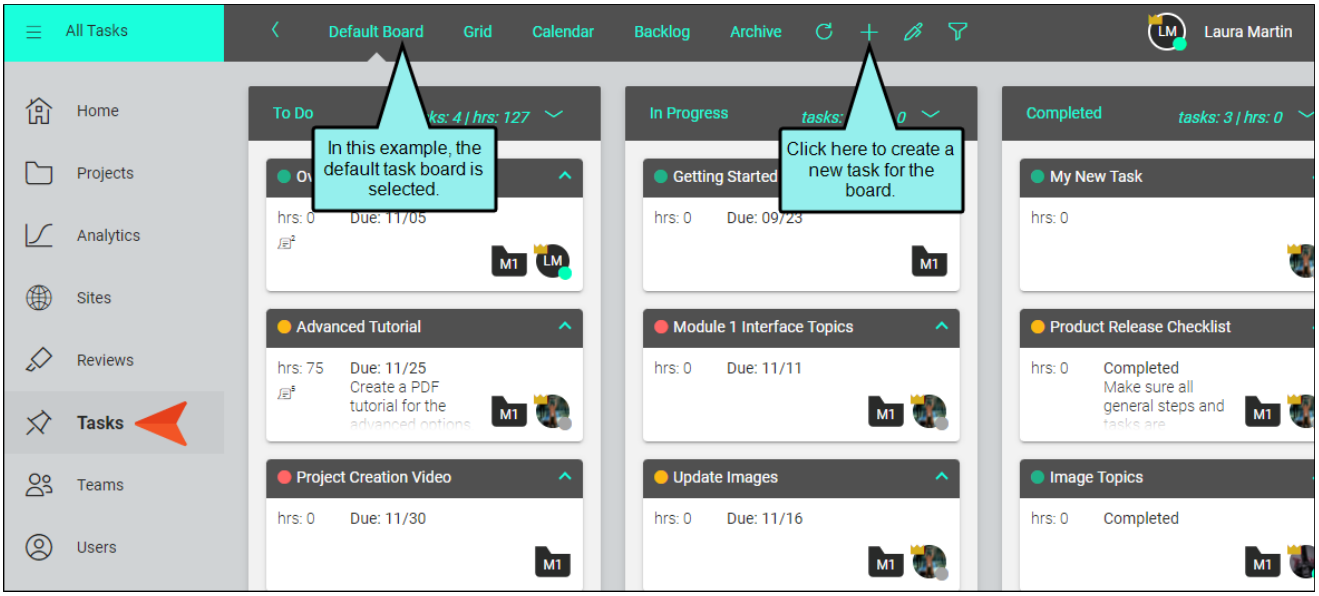
Tasks

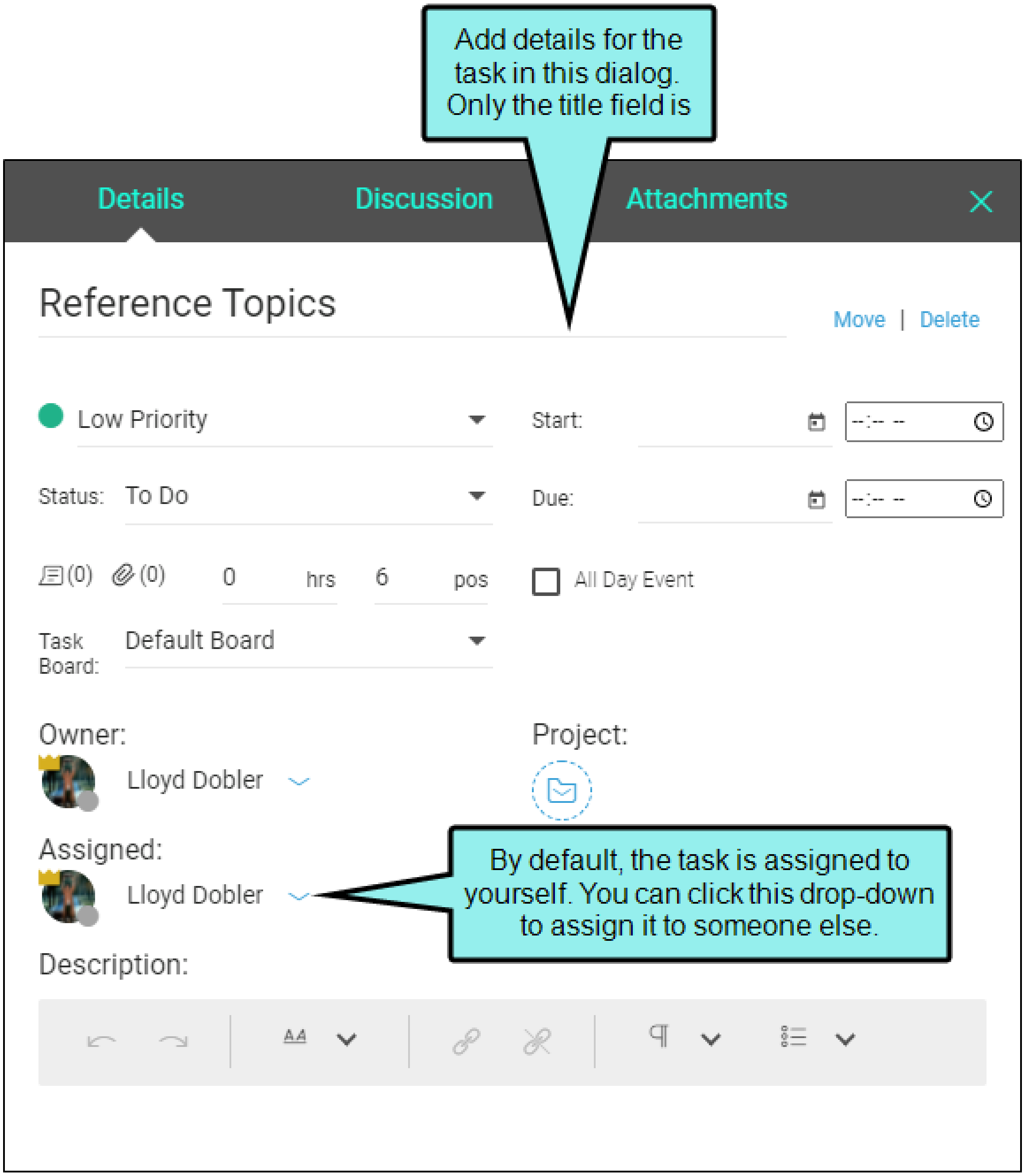
Before creating any tasks, you must first have a task board to hold the tasks. In Central, you can create multiple task boards. This lets you organize tasks according to projects or certain time periods (e.g., product releases).

In the All Tasks and My Tasks columns, you will see two numbers. The first number indicates how many active tasks are associated with the board. The number in parentheses indicates how many inactive tasks are associated with the board; in other words, these are tasks that have been moved to either Backlog or Archive.

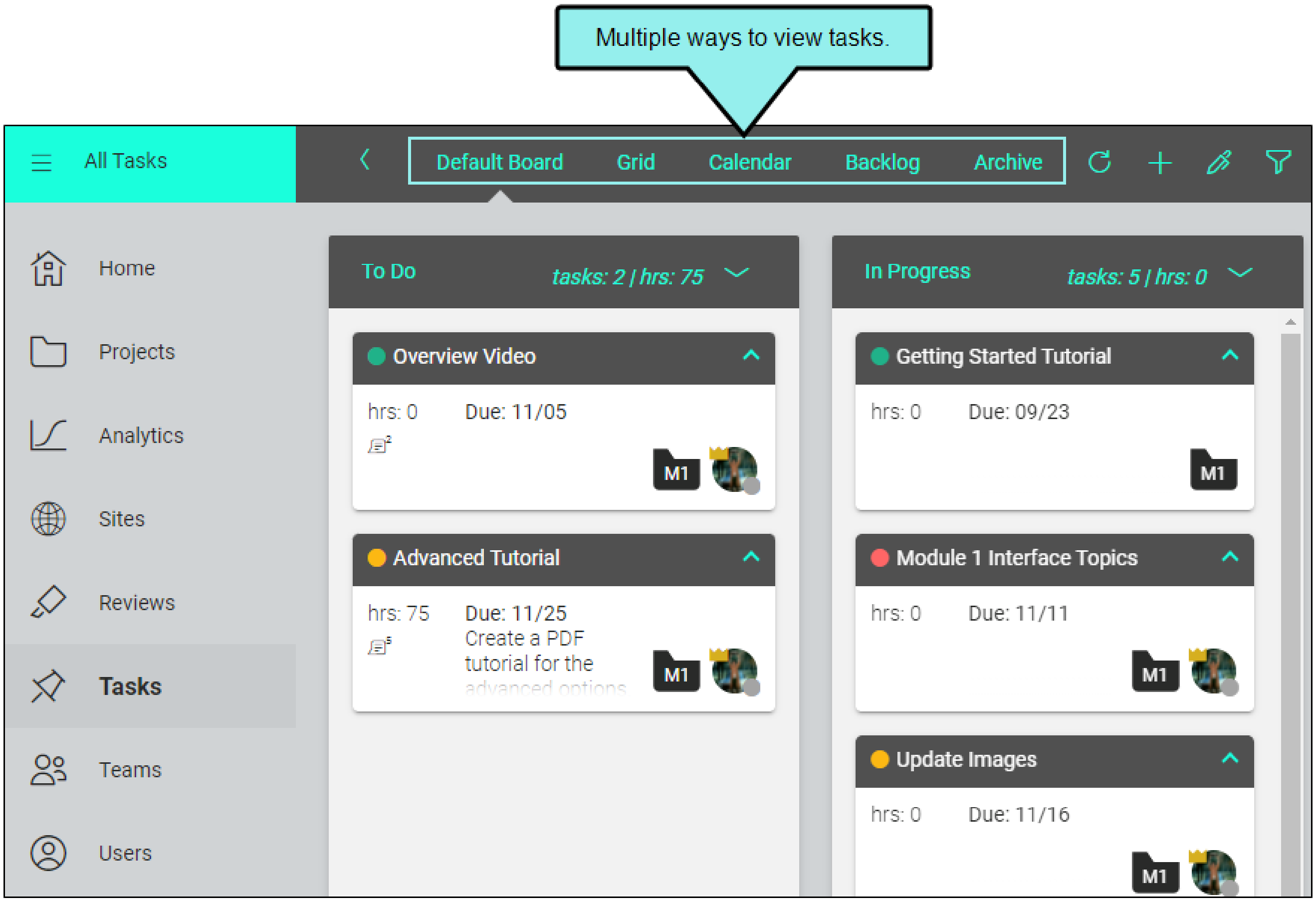


The Tasks page lets you keep track of work that needs to be completed and visualize the work flow. When creating a task board and then tasks within it, you can provide various kinds of information.




Add details for the task in this dialog. Only the title field is
Details
Discussion
Attachments
Reference Topics
Move | Delete
Low Priority
Start:
Status: To Do
Due:
(0) (0) 0 hrs 6 pos
All Day Event
Task Board: Default Board
Owner:
Lloyd Dobler
Project:
Assigned:
Lloyd Dobler
By default, the task is assigned to yourself. You can click this drop-down to assign it to someone else.
Description:

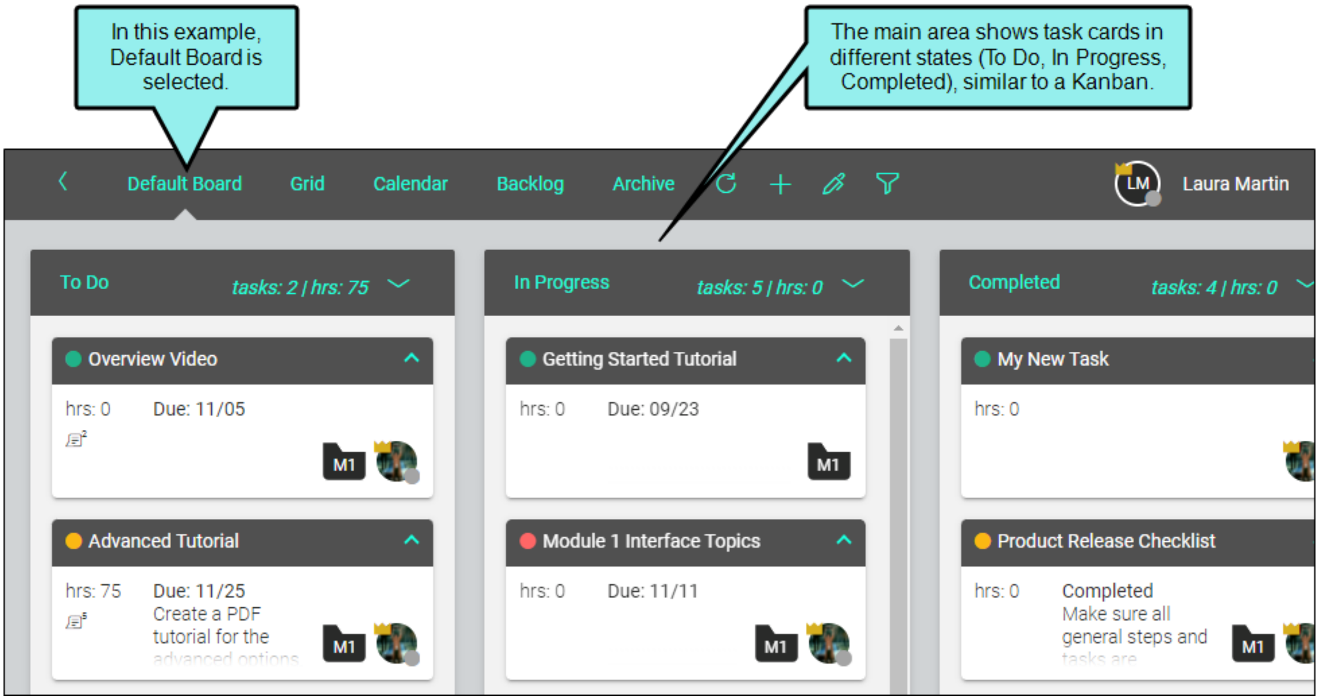
Tabs at the top of the page let you see tasks in multiple views.



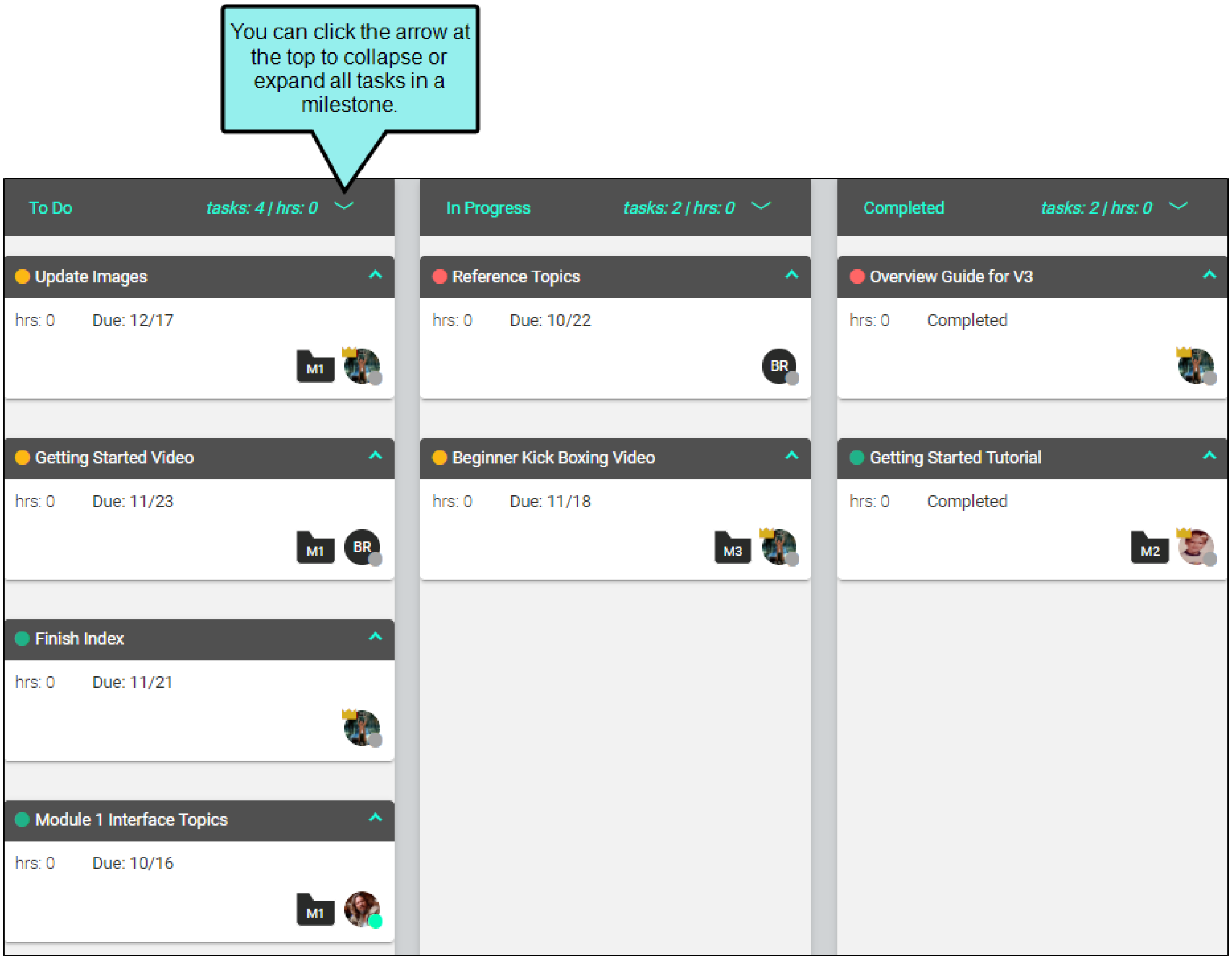
This chapter discusses the following:

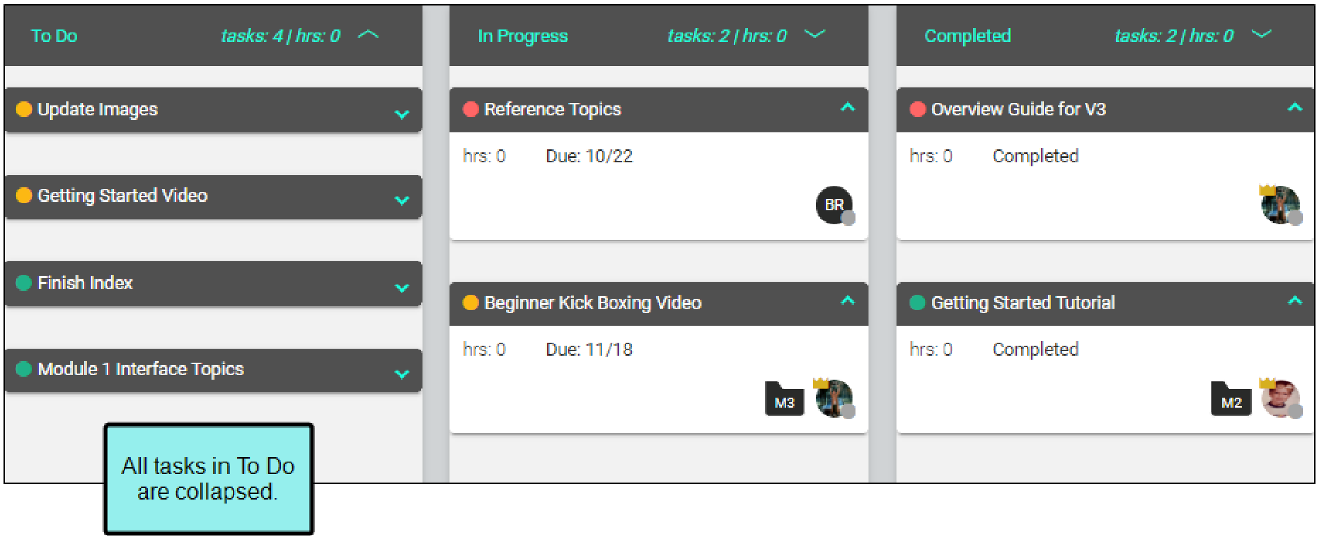
Board

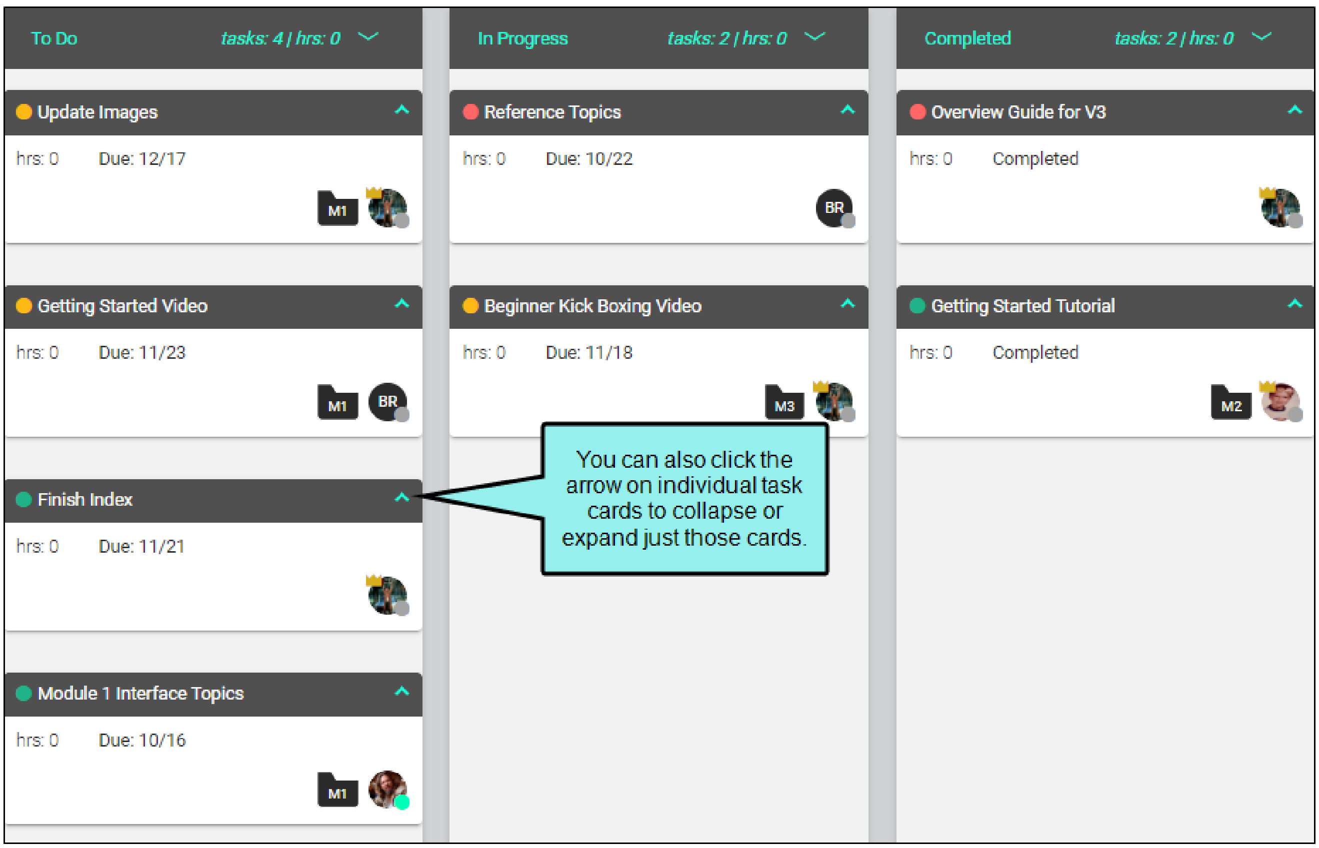
The task board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to a specific task.

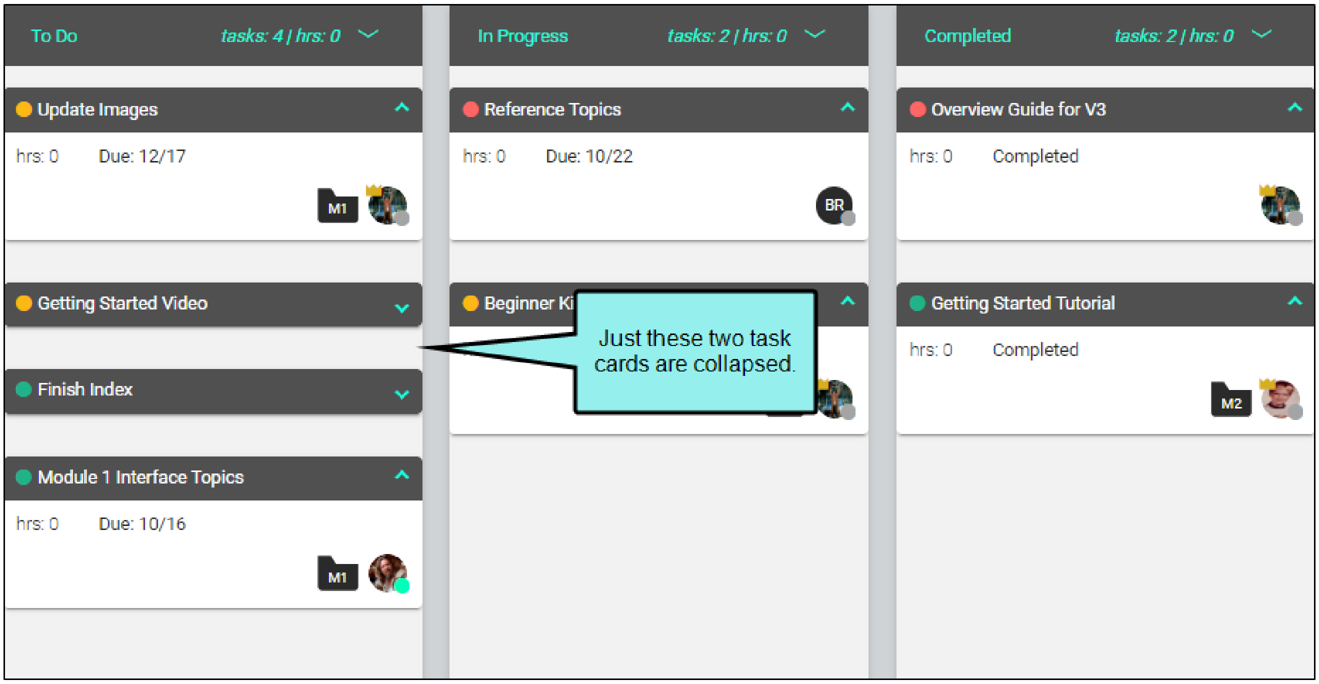


You can collapse and expand any or all cards. This lets you view more task cards on the screen.

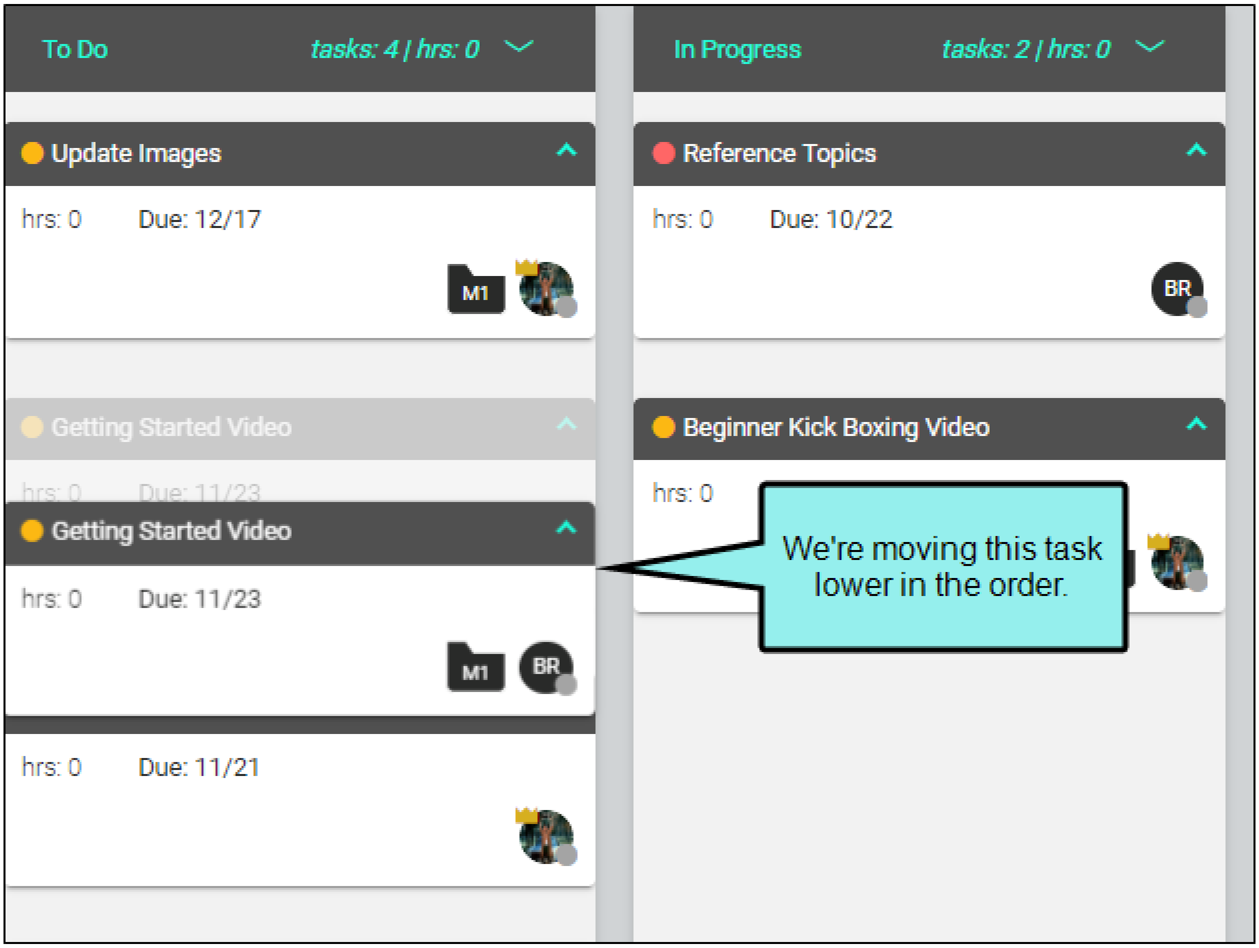


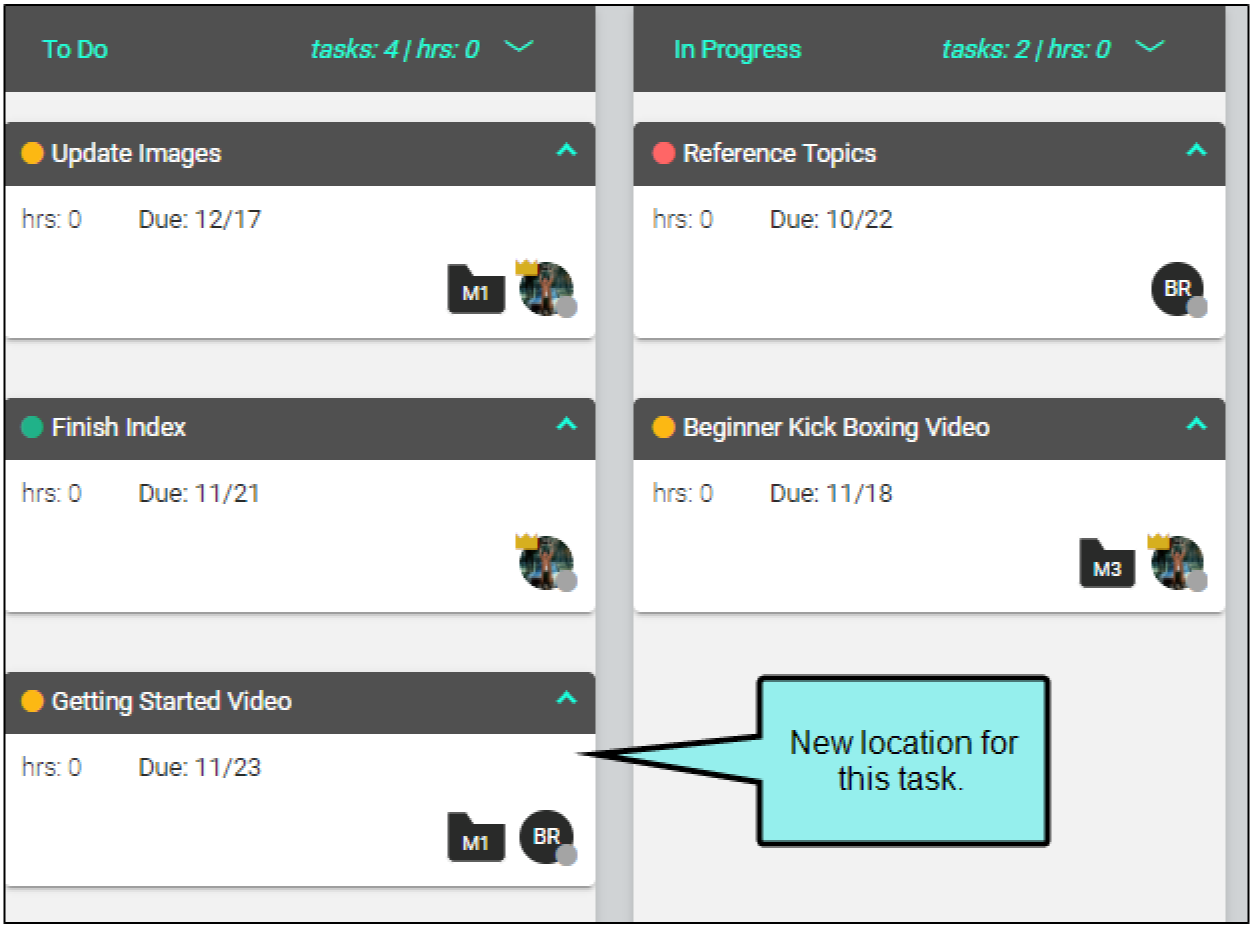

To Do
tasks: 4 | hrs: 0
Update Images
Getting Started Video
Finish Index
Module 1 Interface Topics
All tasks in To Do are collapsed.
In Progress
tasks: 2 | hrs: 0
Reference Topics
hrs: 0
Due: 10/22
BR
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
Completed
tasks: 2 | hrs: 0
Overview Guide for V3
hrs: 0
Completed
Getting Started Tutorial
hrs: 0
Completed
M2


To Do
tasks: 4 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Getting Started Video
hrs: 0
Due: 11/23
M1
BR
Finish Index
hrs: 0
Due: 11/21
Module 1 Interface Topics
hrs: 0
Due: 10/16
M1
In Progress
tasks: 2 | hrs: 0
Reference Topics
hrs: 0
Due: 10/22
BR
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
You can also click the arrow on individual task cards to collapse or expand just those cards.
Completed
tasks: 2 | hrs: 0
Overview Guide for V3
hrs: 0
Completed
Getting Started Tutorial
hrs: 0
Completed
M2


To Do
tasks: 4 | hrs: 0
In Progress
tasks: 2 | hrs: 0
Completed
tasks: 2 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Reference Topics
hrs: 0
Due: 10/22
BR
Overview Guide for V3
hrs: 0
Completed
Getting Started Video
Beginner Ki
Just these two task cards are collapsed.
Getting Started Tutorial
hrs: 0
Completed
M2
Finish Index
Module 1 Interface Topics
hrs: 0
Due: 10/16
M1

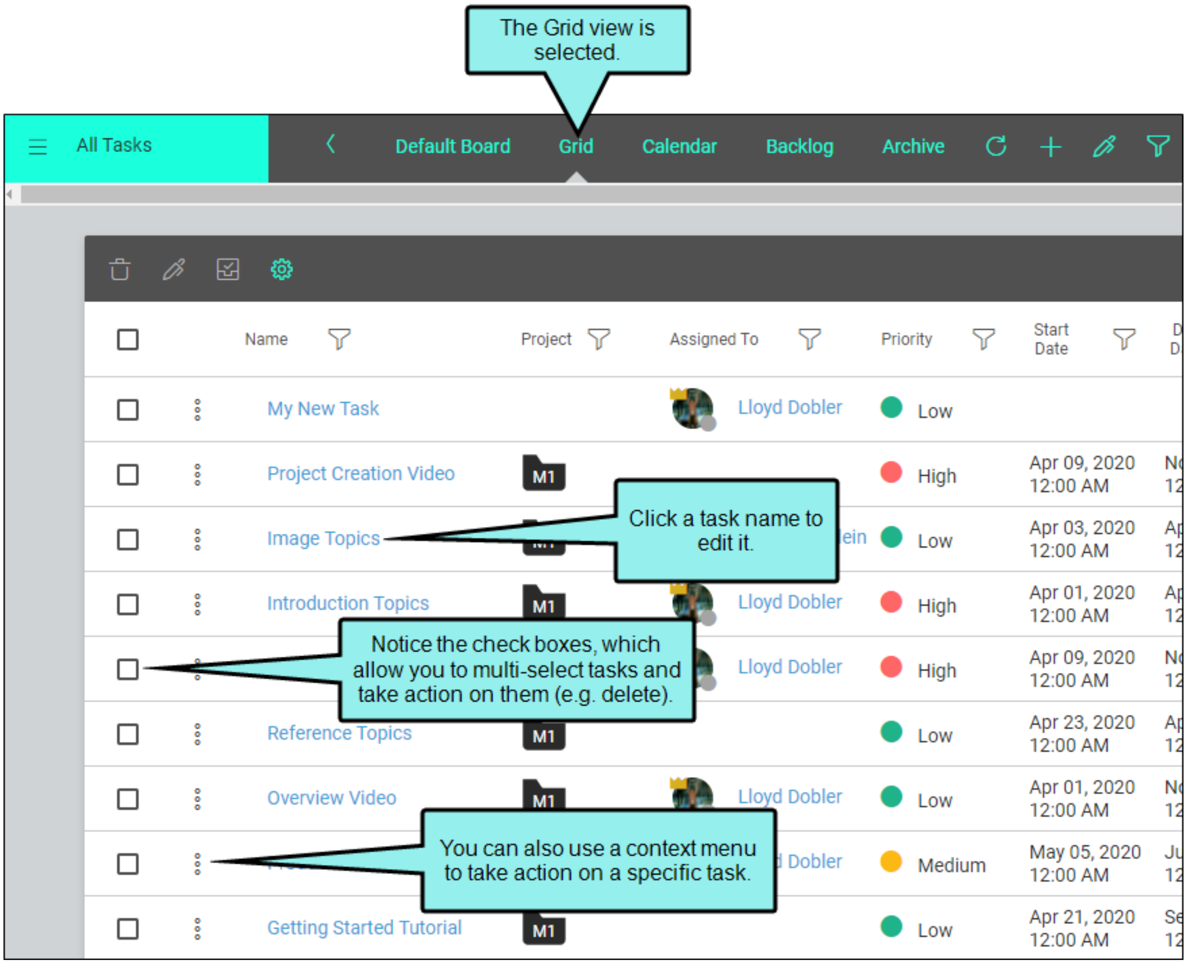
Also, you can customize the order of the tasks within a milestone column by dragging and dropping the cards.




To Do
tasks: 4 | hrs: 0
In Progress
tasks: 2 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Reference Topics
hrs: 0
Due: 10/22
BR
Finish Index
hrs: 0
Due: 11/21
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
Getting Started Video
hrs: 0
Due: 11/23
M1
BR
New location for this task.

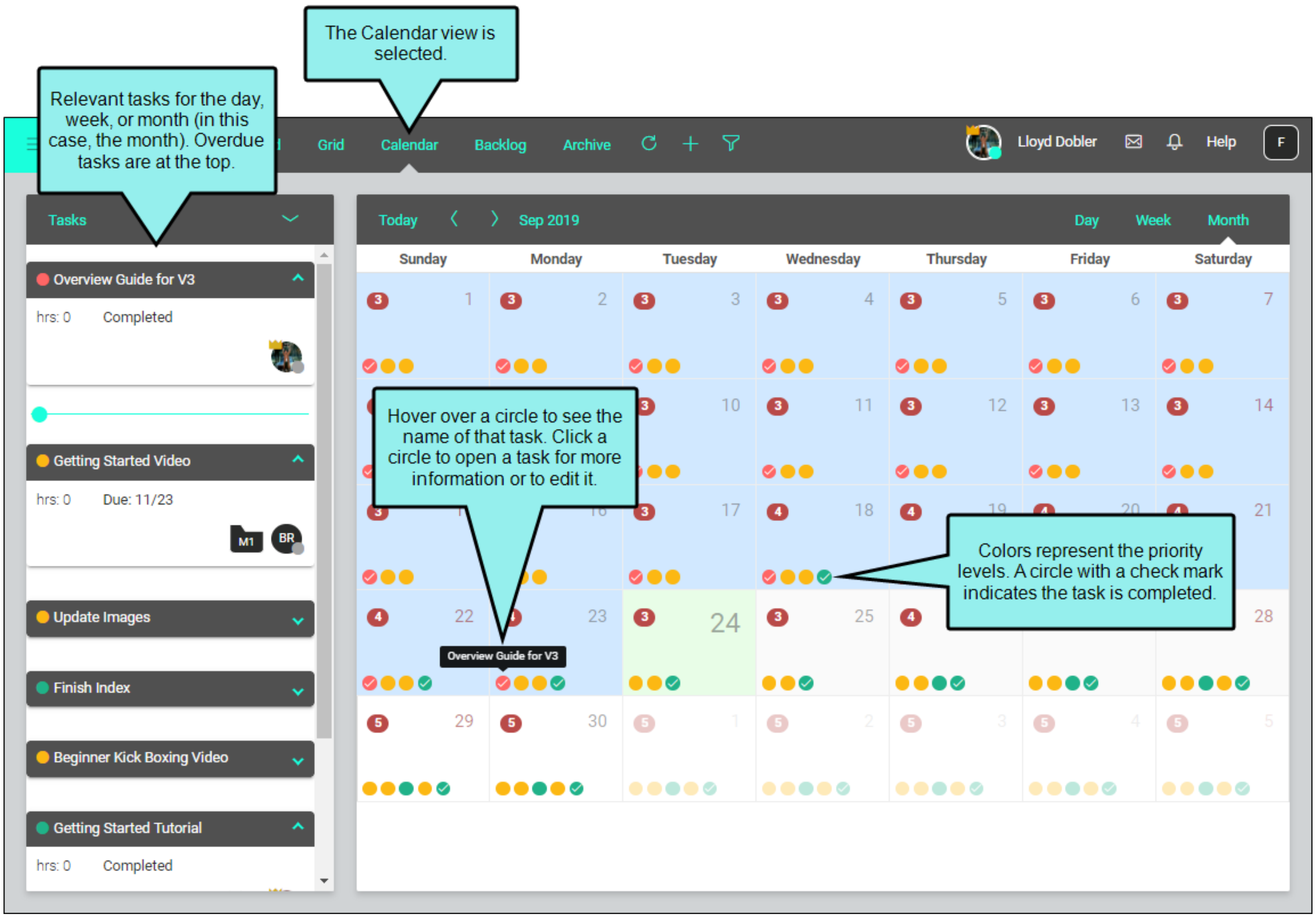
Grid

The Grid view displays tasks in a row format. You can click a task name to edit it. Also, you can use the check boxes to select one or more rows in order to take an action on all those tasks at once, such as moving them to another milestone or deleting them.



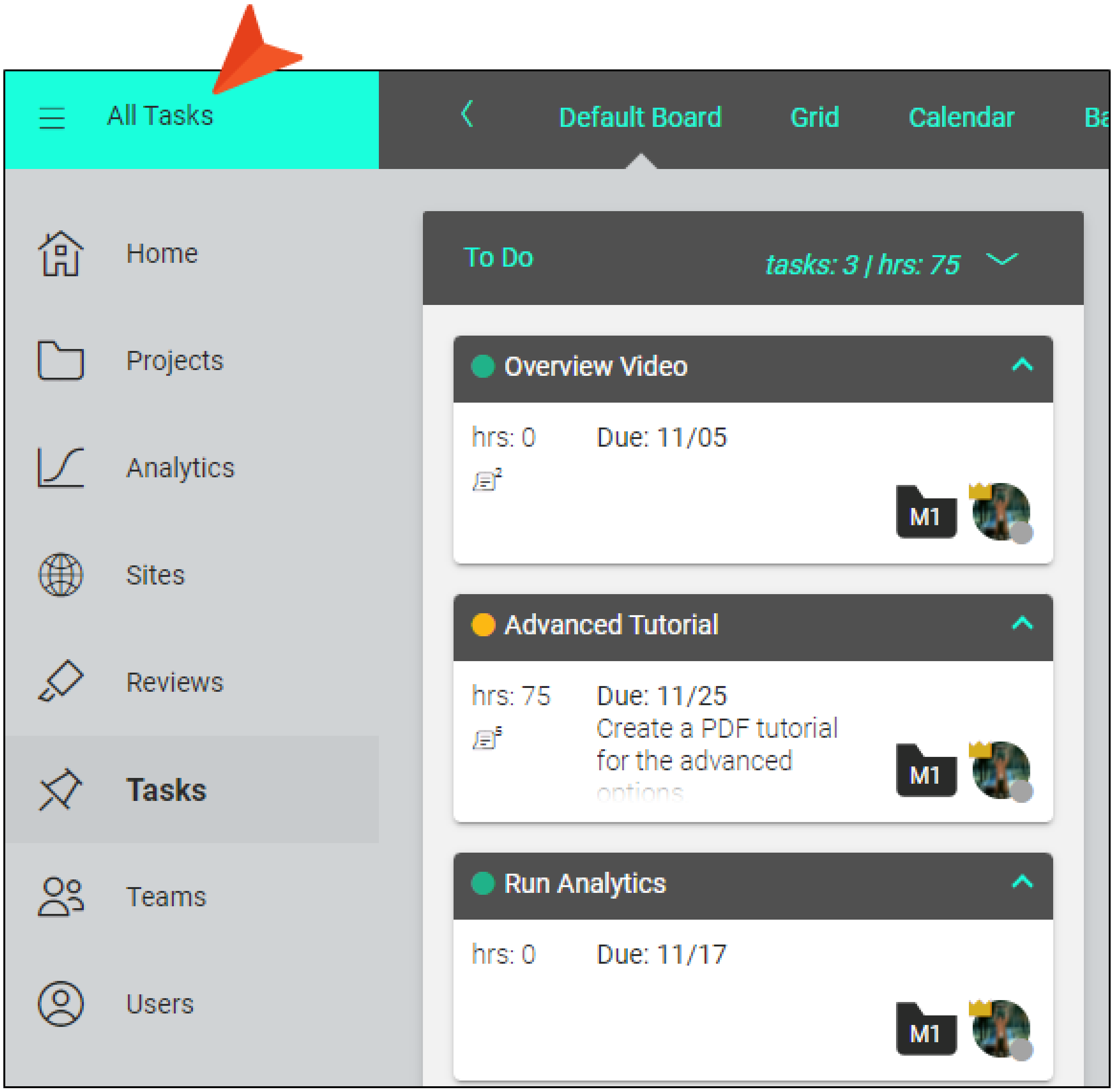
Calendar

The Calendar view displays tasks in a calendar format for the day, week, and month, with task cards listed to the left. Tasks in all milestones—including the Backlog and Archive—are included. However, only tasks that contain dates are displayed in the Calendar view. Small, color-coded circles represent tasks and their priority levels. Hovering over a circle lets you see the name of a task, and clicking the circle opens the task so you can edit it.

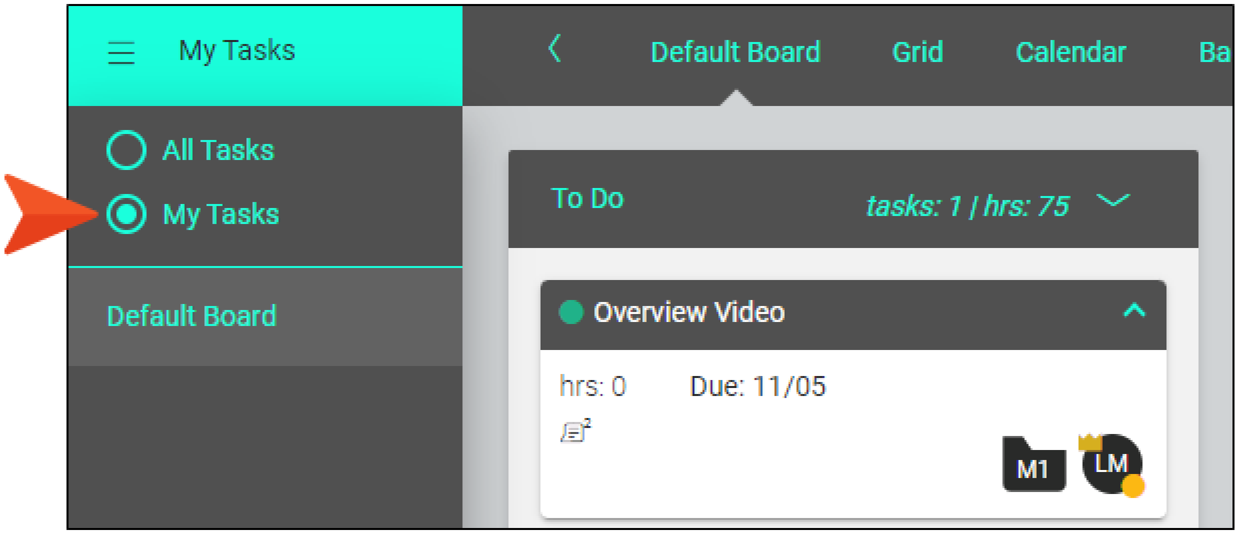


Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and other filters work in any of the Task page views, but can be especially useful in the Calendar view.

To use the "All Tasks/My Tasks" filter, click the upper-left corner of the interface, which by default, should initially say All Tasks.

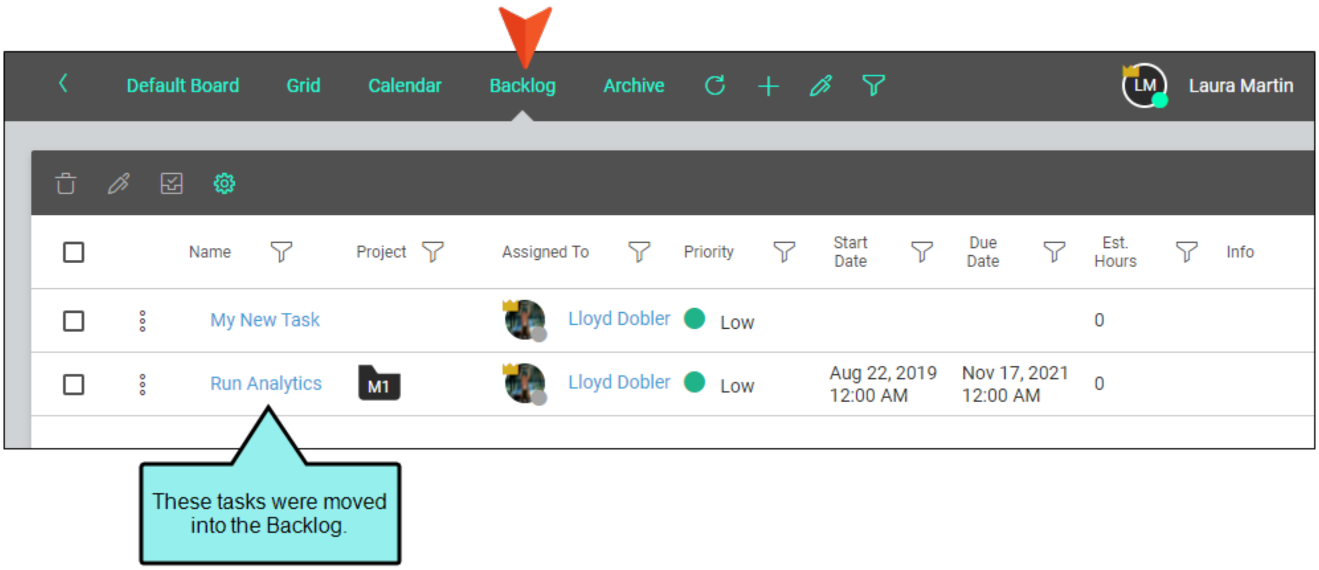


Then, in the flyout menu, you can select **My Tasks**.



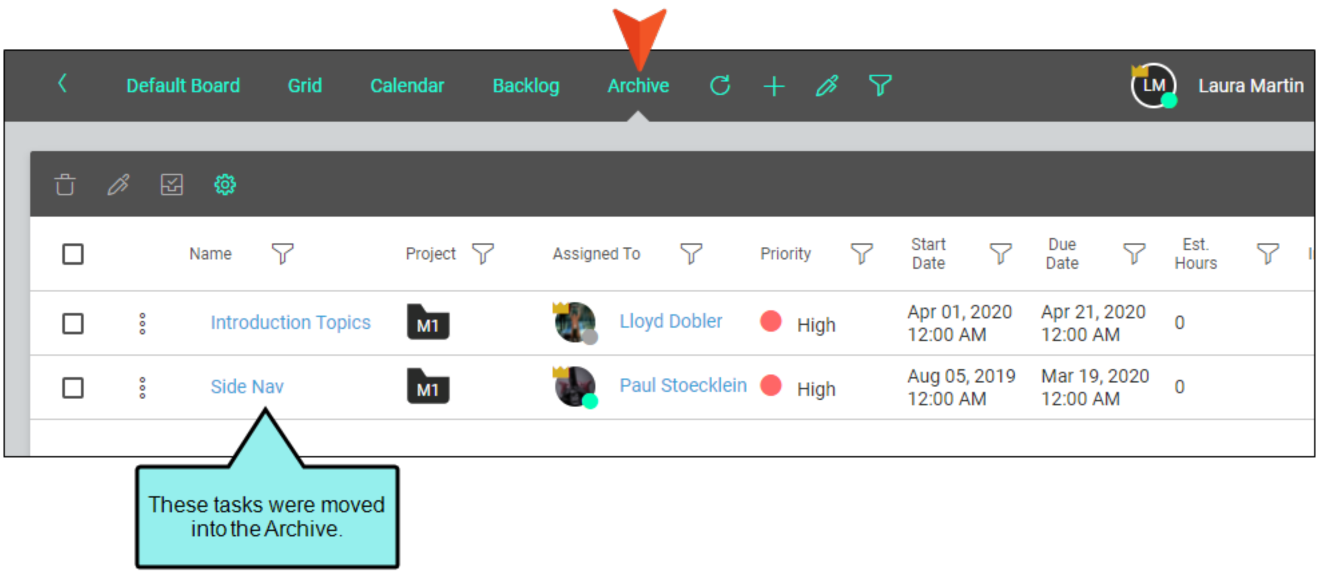
Backlog

The Backlog view displays tasks that are not yet complete and need to be removed from the work flow. The idea is that backlogged tasks will be revisited in the future so that they can be completed.



Archive

The Archive view displays tasks that have been finished and moved out of the current workflow. It is sort of like putting boxes of old documents into the attic; you want them out of the way but can retrieve them later if necessary.

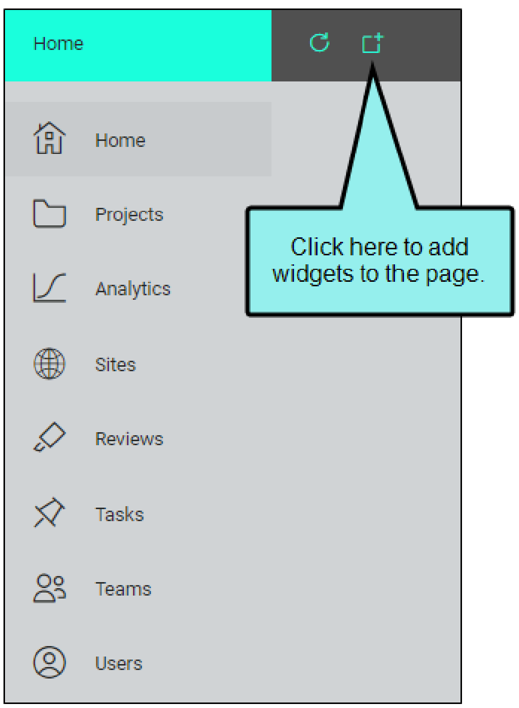


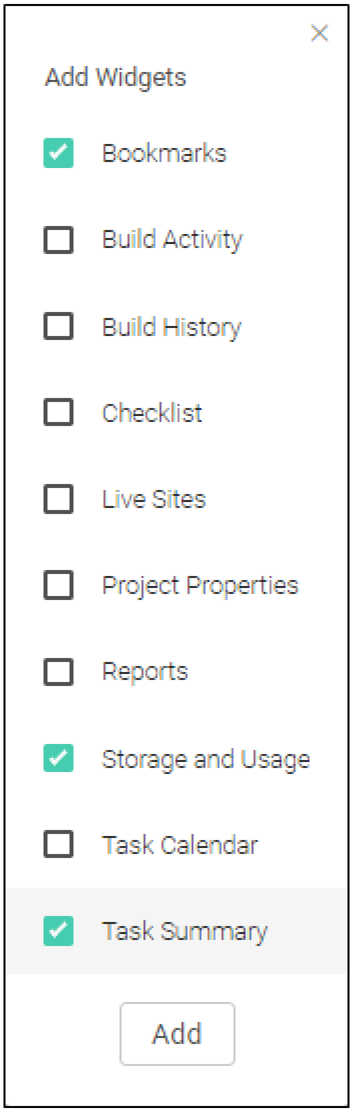
CHAPTER 10

Widgets

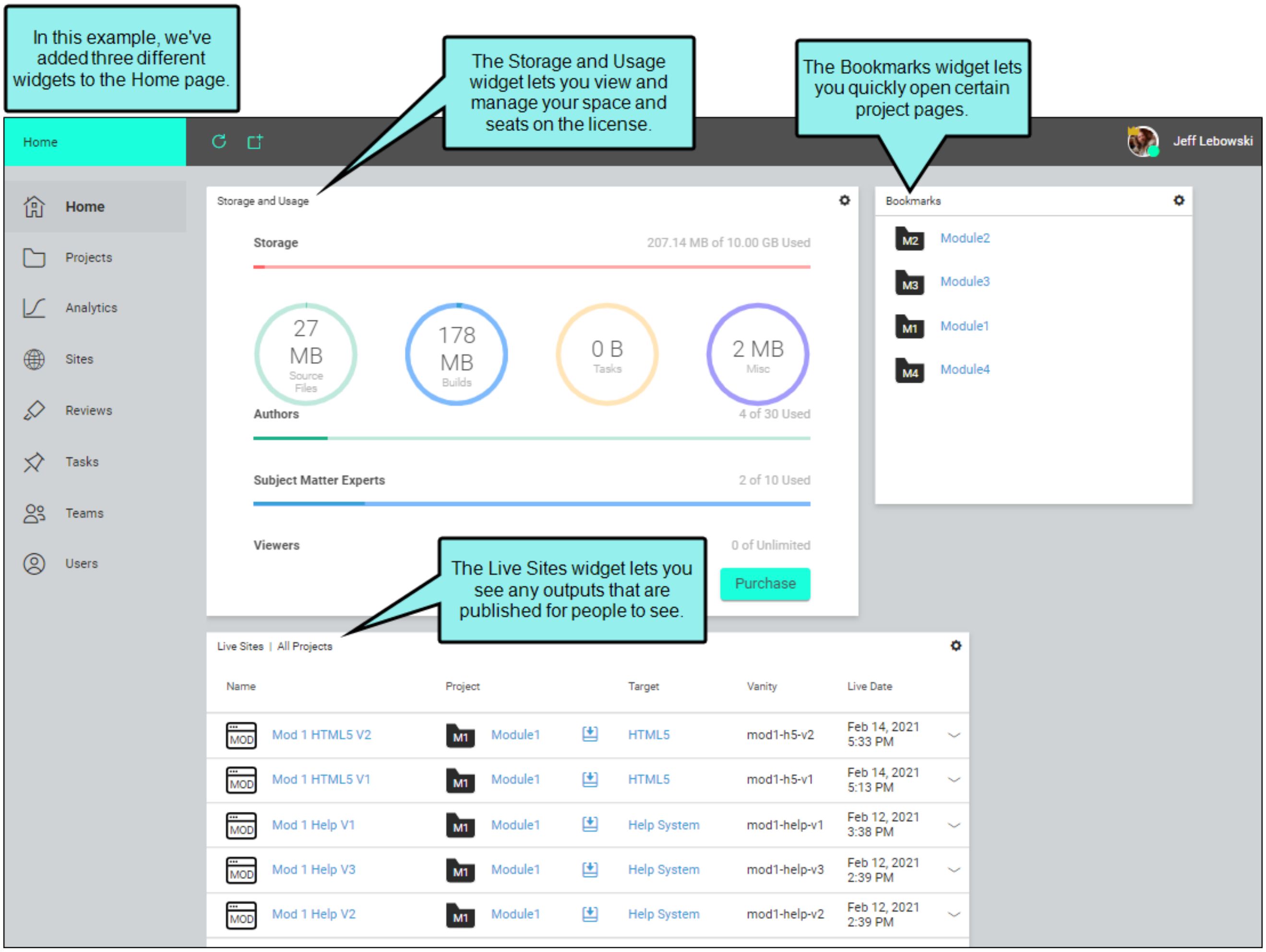
Widgets are standalone information objects that let you see data at a glance and provide quick access to certain areas. You can add widgets for all kinds of information on your Central license.

As information is added to your system, you will probably find it useful to add widgets to your Home dashboard, as well as to individual Project dashboards. Users can customize their own dashboards to meet individual preferences and work habits.



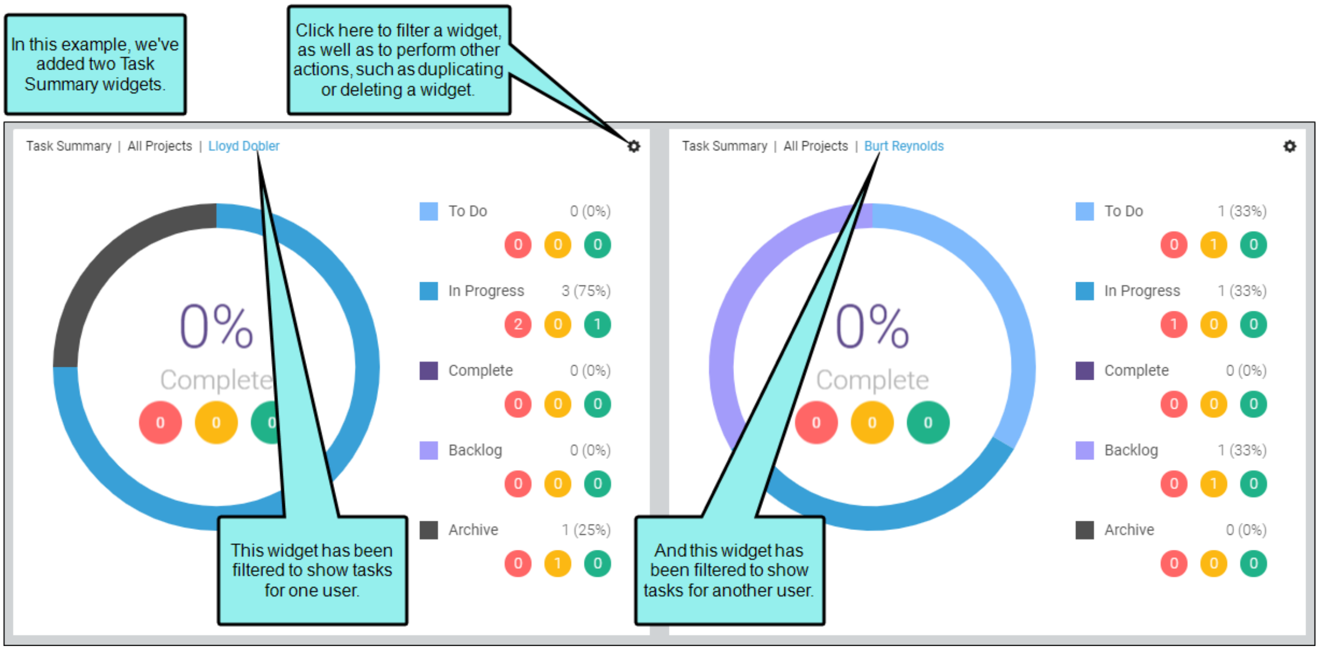

Add Widgets
Bookmarks
Build Activity
Build History
Checklist
Live Sites
Project Properties
Reports
Storage and Usage
Task Calendar
Task Summary
Add

You can click and drag widgets to resize them as you like on your dashboard.



If the screen width is reduced enough, the widgets are reconfigured to stack on top of one another, making them easier to see.

Keep in mind that you can add the same kind of widget multiple times to your dashboard. For example, if you are a documentation manager, you might want to add a Task Summary widget and filter it to show only your tasks. But you then might want to also add a separate Task Summary widget for each of your writers to see the tasks assigned to each of them.



PDFs

The following PDFs are available for download from the online Help.

- *AI Assist Guide*
- *Analytics Guide*
- *Authoring Guide*
- *Branding Guide*
- *Building Output Guide*
- *Checklists Guide*
- *Conditions Guide*
- *Getting Started Guide*
- *Images and Multimedia Guide*
- *License Management and Purchasing Guide*
- *Links Guide*
- *Projects Guide*
- *Reports Guide*
- *Reviews Guide*
- *Security Whitepaper*
- *Sites Guide*
- *Snippets Guide*
- *Source Control Guide*
- *Targets Guide*
- *Tasks Guide*
- *Topics Guide*
- *Translation Guide*
- *Users and Teams Guide*
- *Variables Guide*
- *What's New Guide*
- *Widgets Guide*