

MADCAP CENTRAL

Getting Started Guide

Copyright © 2024 MadCap Software. All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of MadCap Software.

MadCap Software
1660 17th Street, Suite 201
Denver, Colorado 80202
858-320-0387
www.madcapsoftware.com

THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 1

Introduction	5
--------------------	---

CHAPTER 2

Interface	7
Responsive Interface	13

CHAPTER 3

Users and Permissions	15
-----------------------------	----

CHAPTER 4

Teams	21
-------------	----

CHAPTER 5

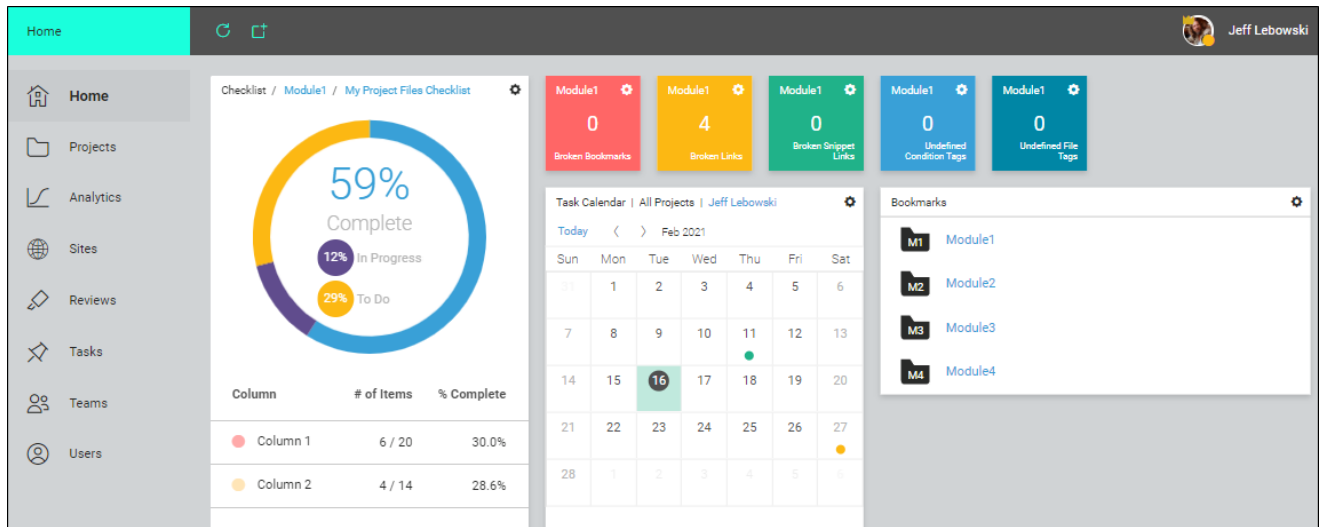
Projects and Builds	24
Creating Projects	26
Uploading Projects	27
Associating Users With Projects	28
Project Dashboard	34
Builds	35
Checklists	36
Files	37

Commits	38
Reports	39
Translations	40
Accessing Other Projects	41
CHAPTER 6	
Sites	43
CHAPTER 7	
Analytics	44
CHAPTER 8	
Reviews	45
CHAPTER 9	
Tasks	48
Board	52
Grid	58
Calendar	59
Backlog	62
Archive	63
CHAPTER 10	
Widgets	64
APPENDIX	
PDFs	68

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.



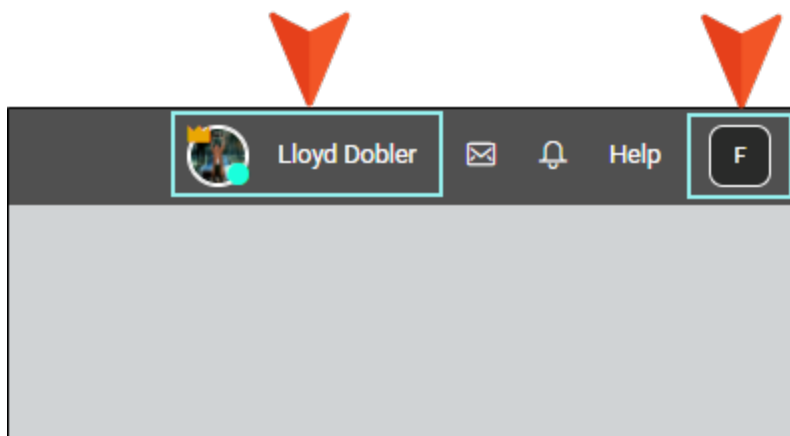
This guide discusses the following:

- **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.

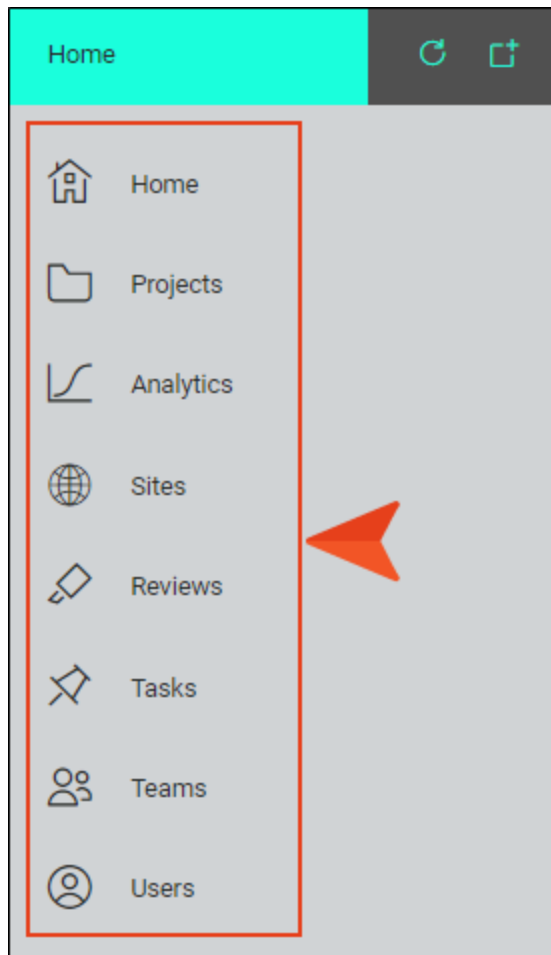
CHAPTER 2


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.



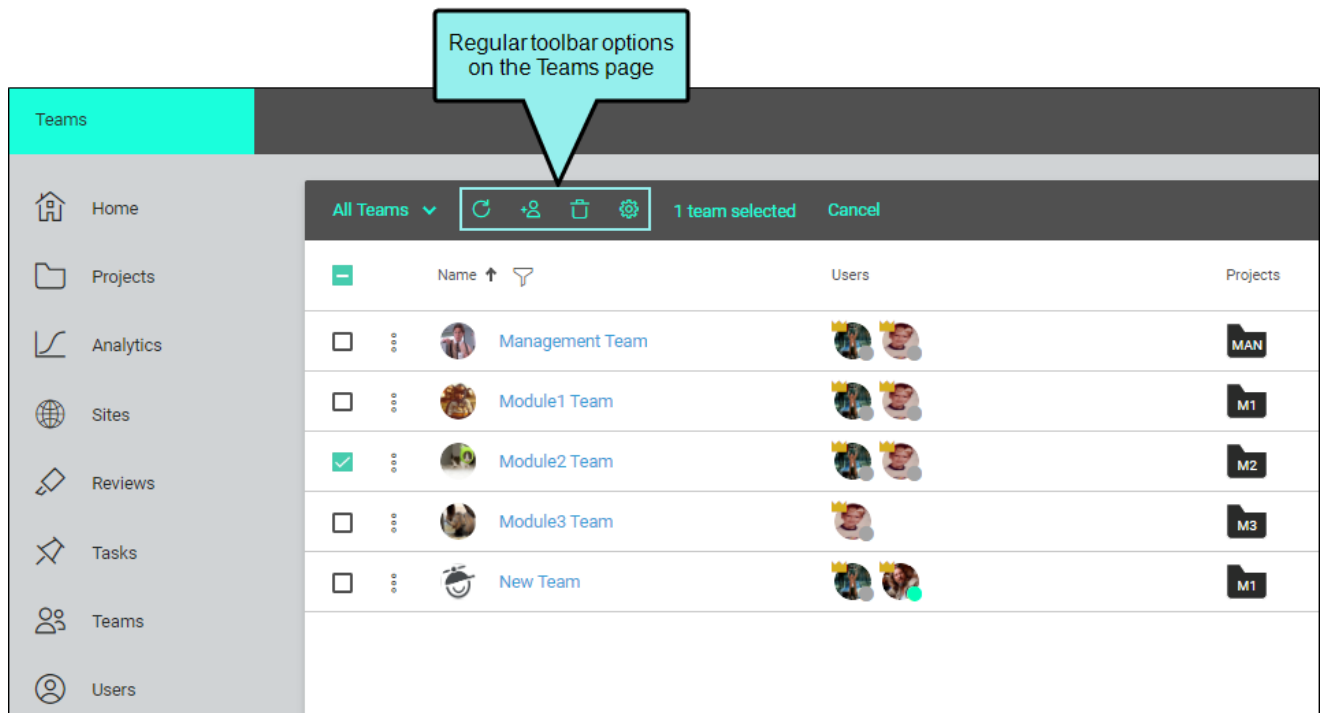
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Tasks, Reviews, Teams, Users, and Translation.



 **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).

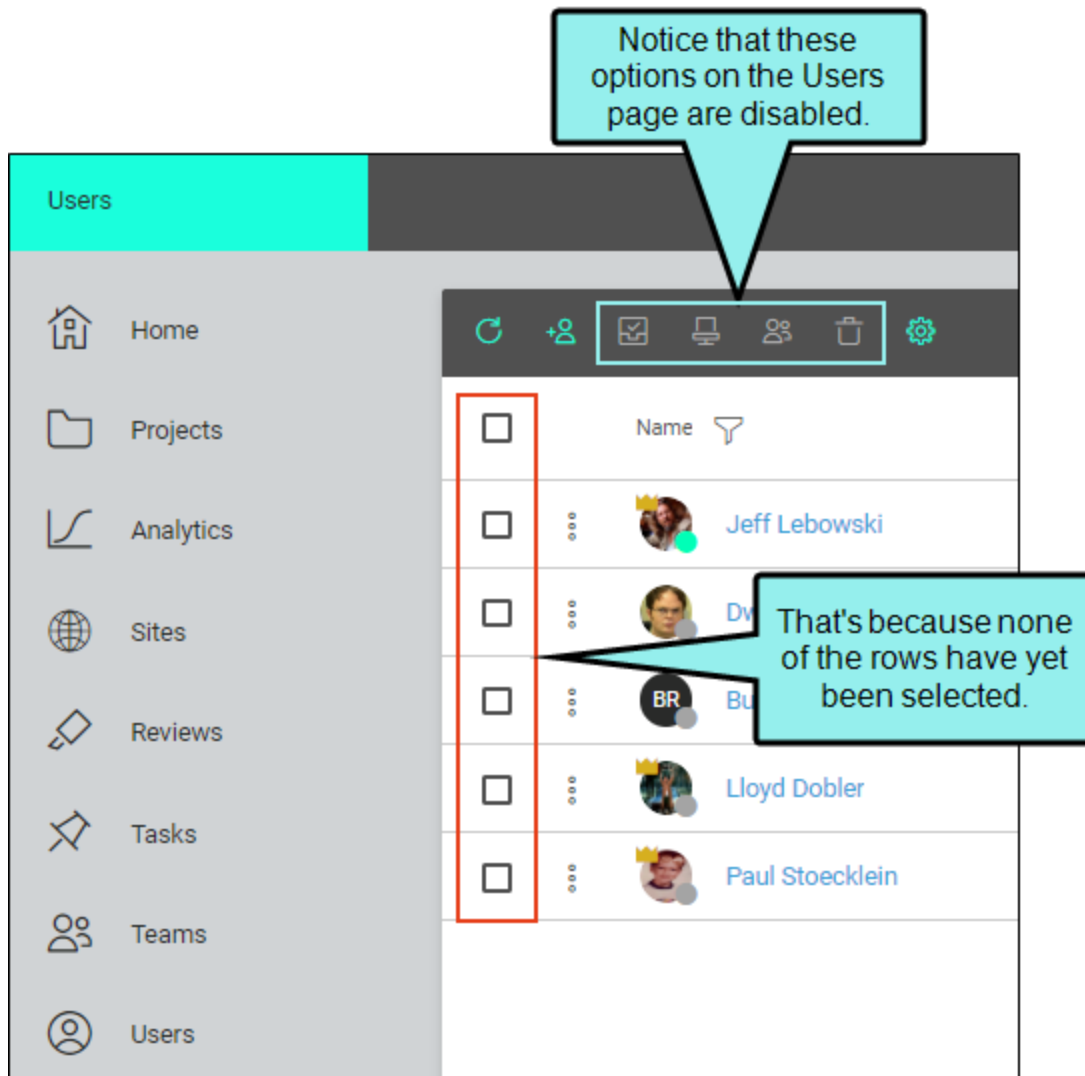


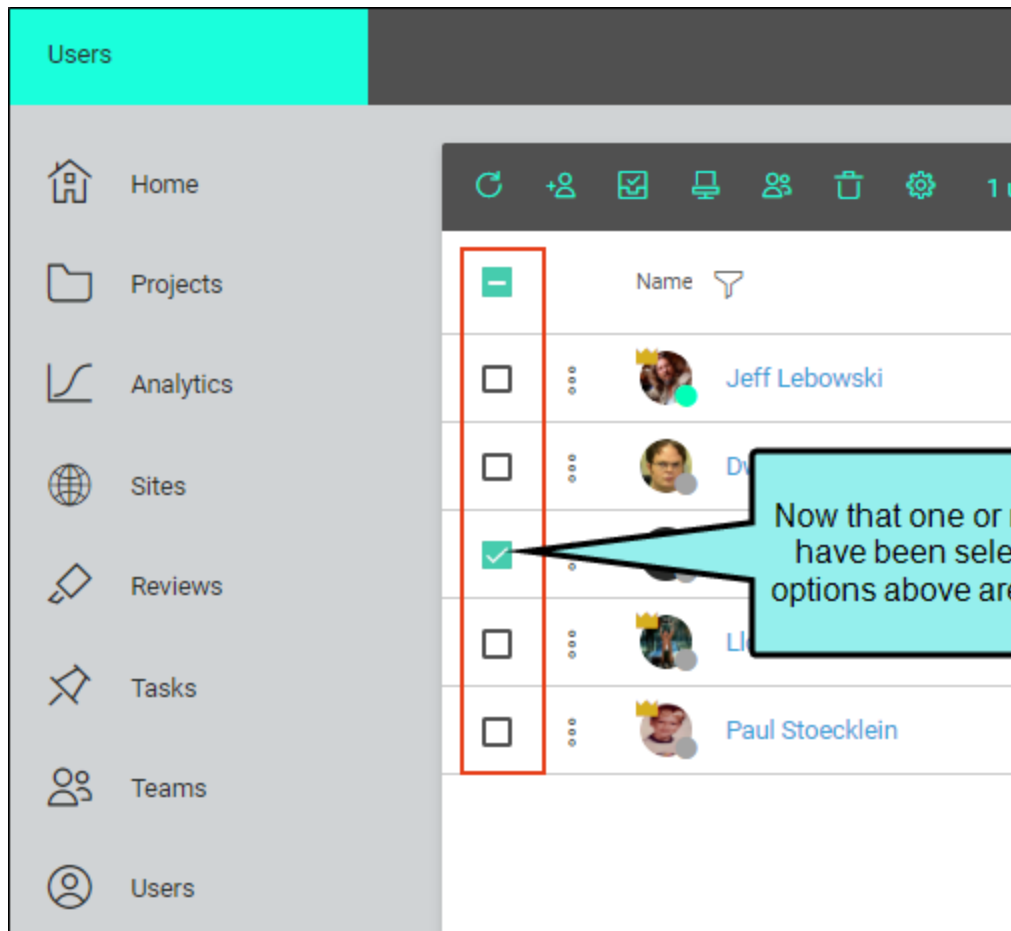
Sub-page (or view) options on the Tasks page

Regular toolbar options on the Tasks page

The screenshot shows a task management application interface. At the top, there is a navigation bar with a menu icon and the text "All Tasks". Below this, a secondary bar contains view options: "Board", "Grid", "Calendar", "Backlog", and "Archive". To the right of these options is a toolbar with icons for refresh, add, filter, and a "Clear" button. A callout box points to the view options, and another points to the toolbar. The main content area is divided into two columns. The left column is titled "To Do" and contains three task cards: "Advanced Tutorial" (75 hours, due 04/30), "Run Analytics" (0 hours, due 05/28), and "Reference Topics" (52 hours, due 04/17). The right column is titled "In Progress" and contains one task card: "Introduction Topics" (0 hours, due 04/15). A left sidebar contains navigation links for Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, and Users.


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

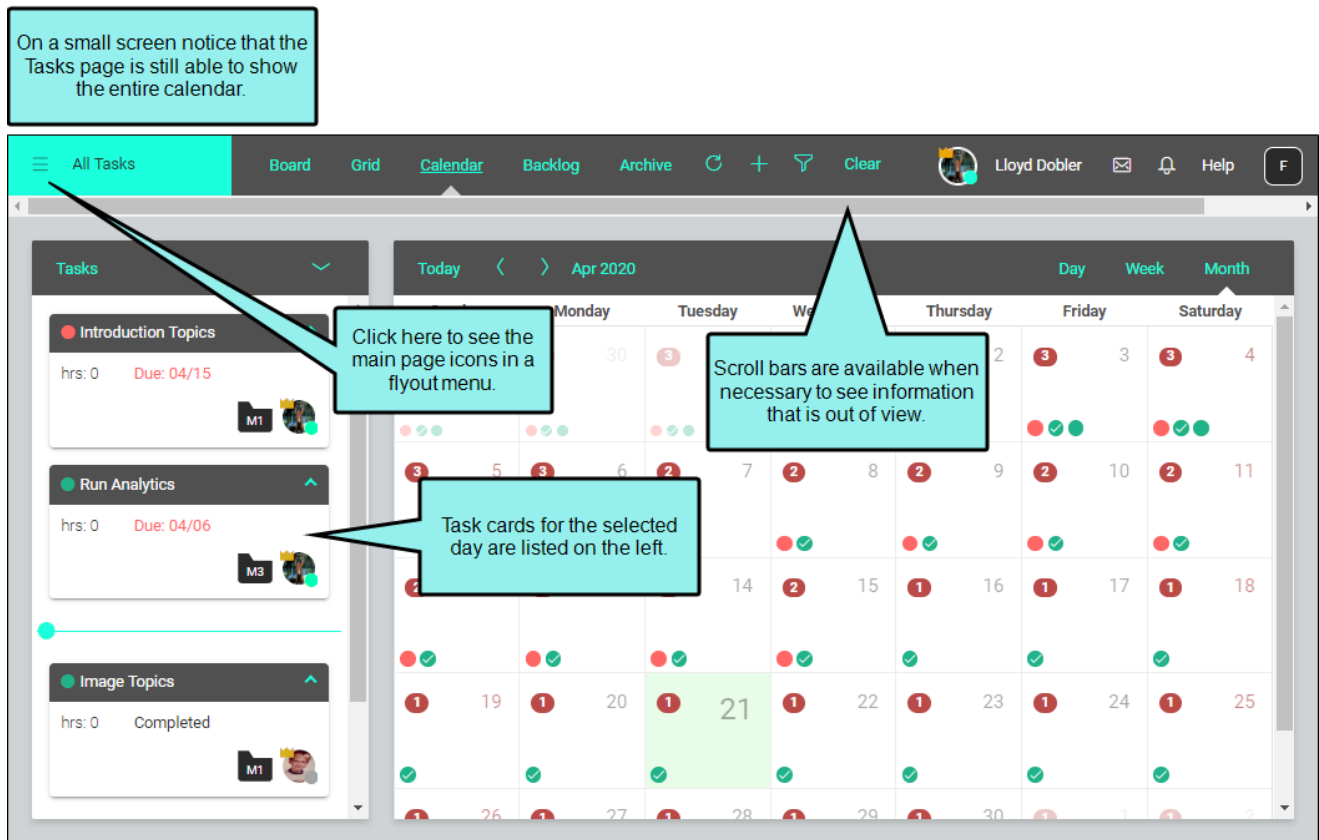




Responsive Interface

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.



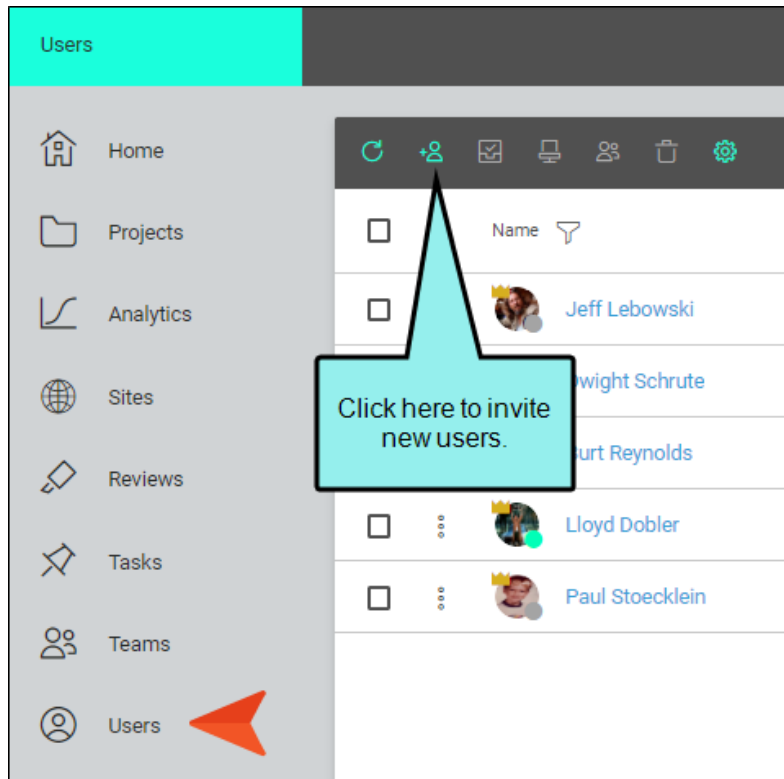
The screenshot shows a task management application interface. At the top, there is a navigation bar with tabs for 'All Tasks', 'Board', 'Grid', 'Calendar', 'Backlog', 'Archive', and 'Clear'. The user's name 'Lloyd Dobler' and a help icon are also visible. On the left, a dark flyout menu contains icons for 'Home', 'Projects', 'Analytics', 'Sites', 'Reviews', 'Tasks', 'Teams', and 'Users'. Below these are sections for 'Activity' and 'What's New!', with sub-items 'All Tasks' and 'My Tasks'. The main area displays a calendar for April 2020, with tasks represented by colored dots and numbers. Three callout boxes provide instructions:

- Callout 1:** From the flyout menu, you can open any of the other main pages.
- Callout 2:** You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
- Callout 3:** 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.

1 Start — 2 User Type Author — 3 CSV File — 4 Permissions — 5 Teams Optional — 6 Summary X

Download the [template](#) CSV file. Then click the button below and select the file. For more information, [click here](#).

Select Your File *

Back Next

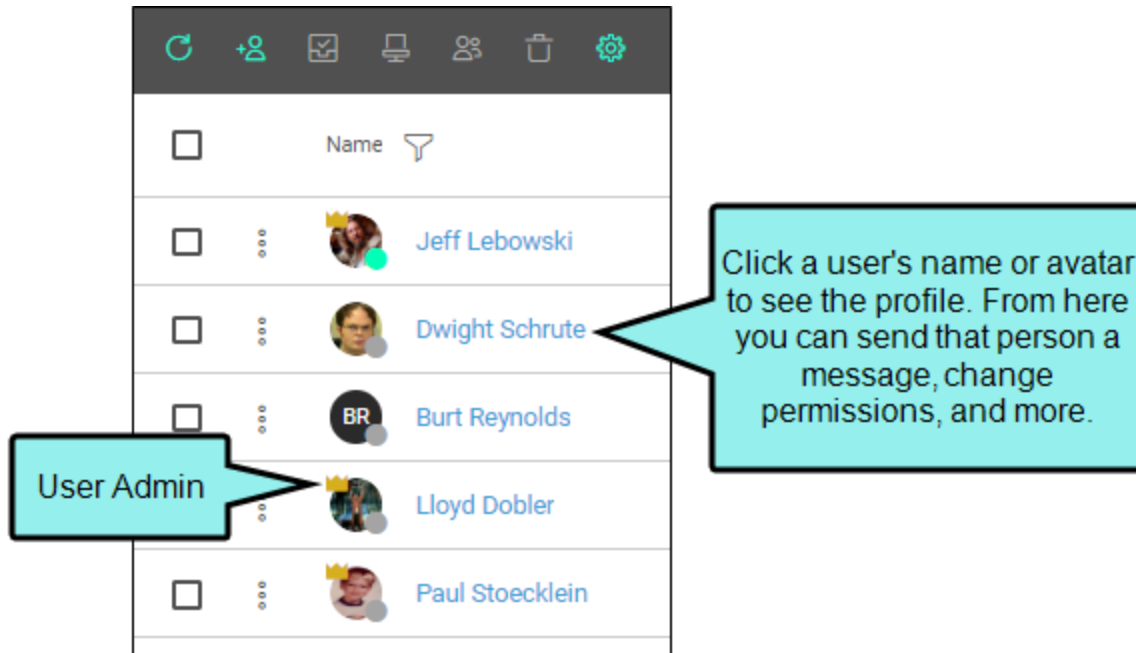
When inviting multiple users, your CSV file should be organized like this. Notice the spelling of the email, first name, and last name column headings.

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

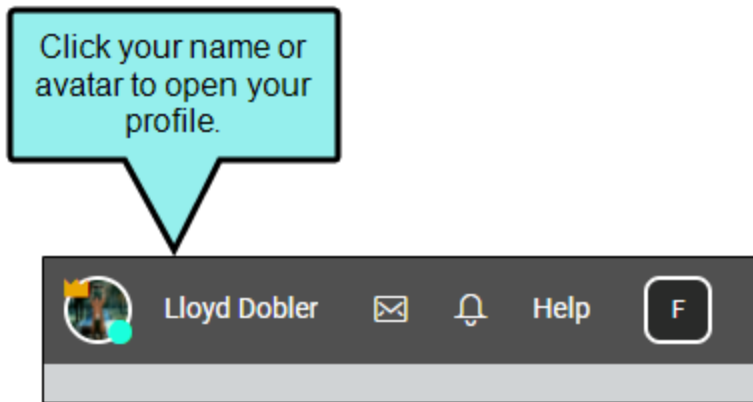
A person with “User Administration” rights can assign permissions to other users (authors only, not SMEs or viewers). Some users might receive only basic permissions, while others might be granted higher administrative rights.

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.



Profile

Avatar

Change | Delete

First Name *
Lloyd

Last Name *
Dobler

Initials (no avatar) *
LD

Title

Phone
(123) 456-7890

Cell Phone
(123) 456-7890

Location
La Jolla, CA


Department
R&D

Cancel Save

Select options on the left, then make changes in the area to the right.

Settings

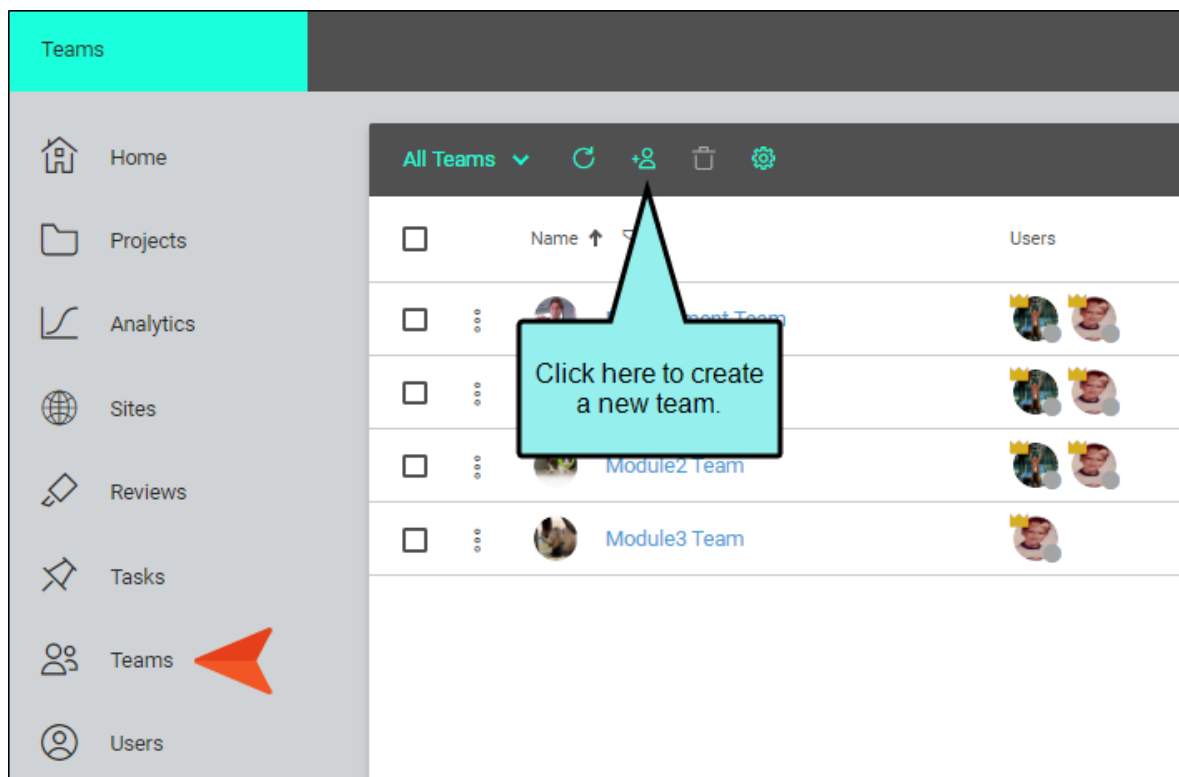
- Password
- Access
- Assign New Task
- Activity
- Permissions
- Notifications
- Deactivate
- Delete

 **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.

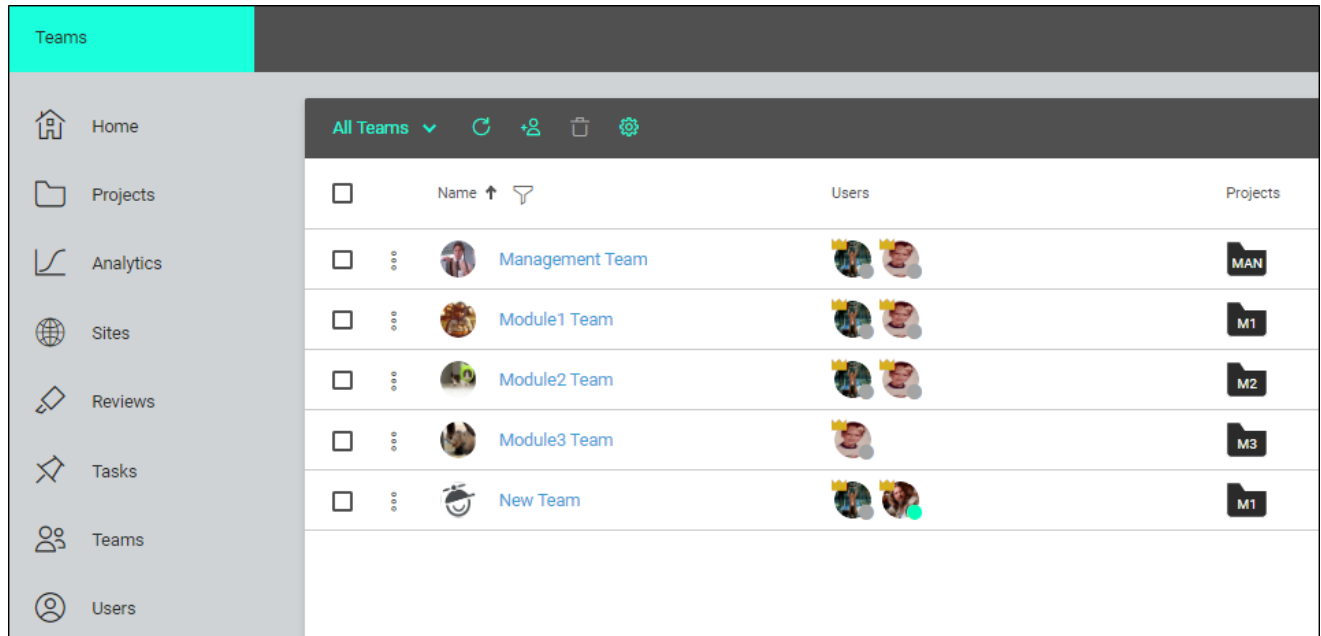


Not only can you associate specific users with a team, but you can also link teams to projects and sites. You can also set permissions for authors who you've added to the team.

The screenshot shows a multi-step process for team management. The top navigation bar includes six steps: 1. Team Settings (My Team), 2. Permissions (Partial), 3. Users (3 users), 4. Projects, 5. Sites, and 6. Summary. Step 3, 'Users', is highlighted with a red box and an orange arrow pointing to it. Below the navigation bar is a list of users, each with a checkbox and a profile picture. The users listed are: Beatrix Kiddo, Clarice Starling (checked), Ella Fitzgerald (checked), Inigo Montoya, Jack Frost, Jeff Lebowsky (checked), John Harkins, Jules Winnfield, and Laura Martin. At the bottom right of the interface are 'Back' and 'Next' buttons.

User	Selected
Beatrix Kiddo	<input type="checkbox"/>
Clarice Starling	<input checked="" type="checkbox"/>
Ella Fitzgerald	<input checked="" type="checkbox"/>
Inigo Montoya	<input type="checkbox"/>
Jack Frost	<input type="checkbox"/>
Jeff Lebowsky	<input checked="" type="checkbox"/>
John Harkins	<input type="checkbox"/>
Jules Winnfield	<input type="checkbox"/>
Laura Martin	<input type="checkbox"/>

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



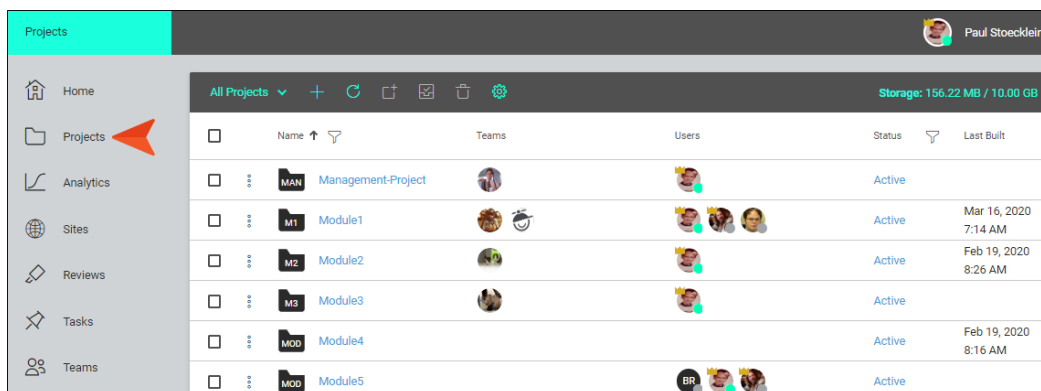
CHAPTER 5

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.



The screenshot shows the 'Projects' page in the Central interface. The page has a dark sidebar on the left with navigation options: Home, Projects (highlighted with a red arrow), Analytics, Sites, Reviews, Tasks, and Teams. The main content area displays a table of projects under the heading 'All Projects'. The table has columns for Name, Teams, Users, Status, and Last Built. The storage usage is shown as 156.22 MB / 10.00 GB. The projects listed are:

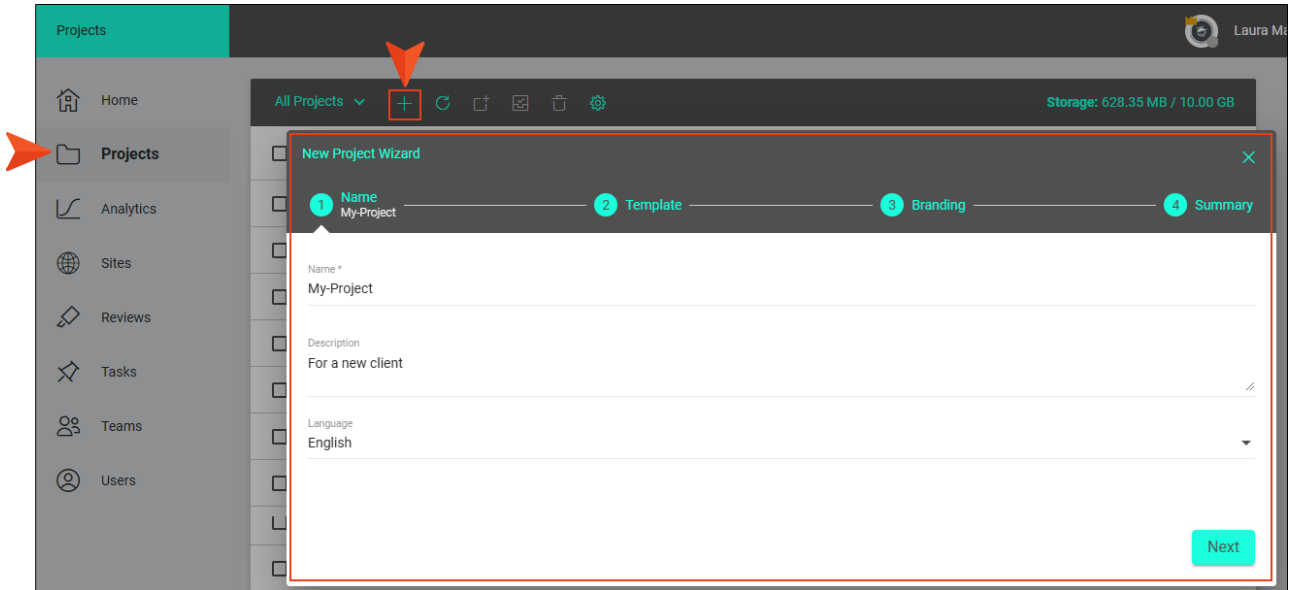
Name	Teams	Users	Status	Last Built
MAN Management-Project	[Team Icon]	[User Icons]	Active	
M1 Module1	[Team Icon]	[User Icons]	Active	Mar 16, 2020 7:14 AM
M2 Module2	[Team Icon]	[User Icons]	Active	Feb 19, 2020 8:26 AM
M3 Module3	[Team Icon]	[User Icons]	Active	
M00 Module4	[Team Icon]	[User Icons]	Active	Feb 19, 2020 8:16 AM
M00 Module5	[Team Icon]	[User Icons]	Active	

This chapter discusses the following:

Creating Projects	26
Uploading Projects	27
Associating Users With Projects	28
Project Dashboard	34
Builds	35
Checklists	36
Files	37
Commits	38
Reports	39
Translations	40
Accessing Other Projects	41

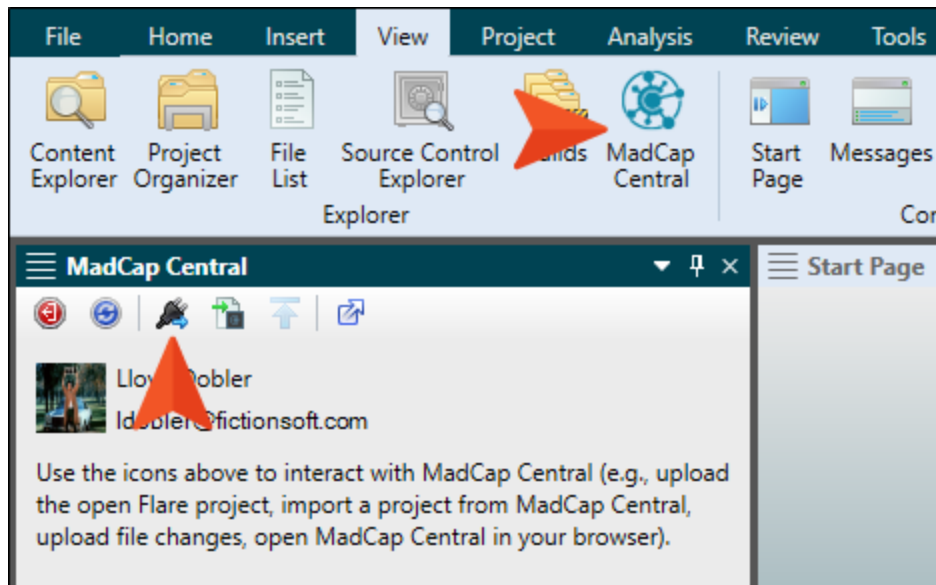
Creating Projects

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.

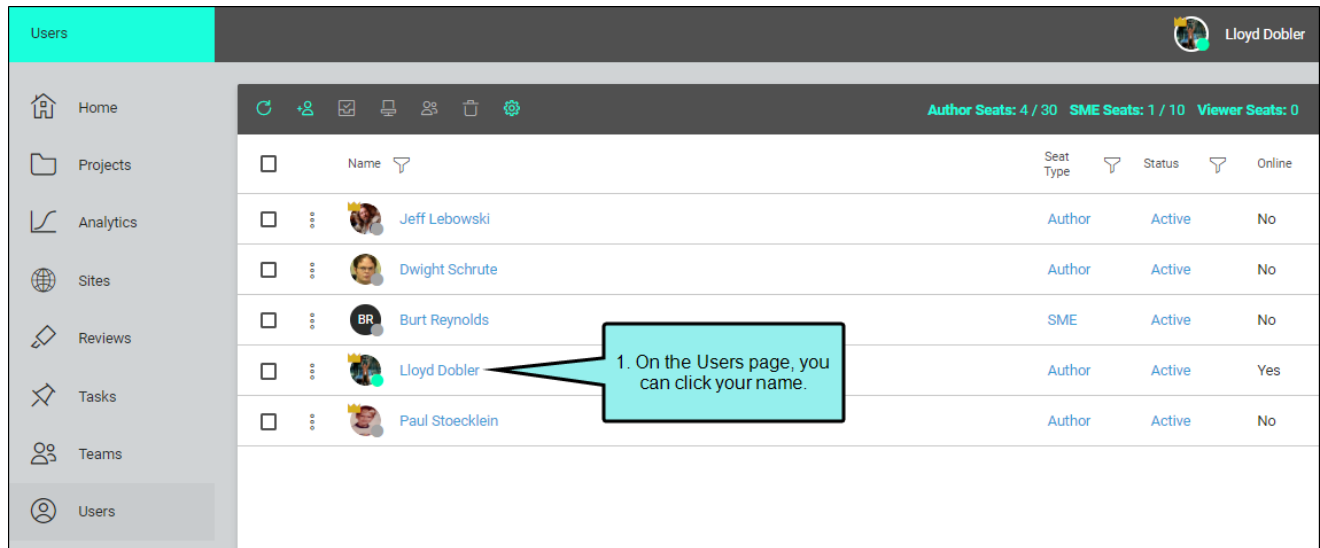


IMPORTANT Central is not a replacement for your desktop Flare application. You continue to author your project content locally in Flare. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project on Central. If you are working 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*.

I 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.



The screenshot shows the 'Users' page in a software application. The page has a sidebar on the left with navigation options: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, and Users. The main content area displays a table of users. The table has columns for Name, Seat Type, Status, and Online. The user 'Lloyd Dobler' is highlighted in blue, and a callout box points to his name with the text '1. On the Users page, you can click your name.'

Name	Seat Type	Status	Online
Jeff Lebowski	Author	Active	No
Dwight Schrute	Author	Active	No
Burt Reynolds	SME	Active	No
Lloyd Dobler	Author	Active	Yes
Paul Stoecklein	Author	Active	No

The screenshot shows a user profile for Lloyd Dobler. The profile information includes an email address, company, location, and phone numbers. A sidebar menu on the left contains options like Settings, Password, Access, Assign New Task, Activity, Permissions, Notifications, Deactivate, and Delete. The 'Access' option is highlighted, and a callout box points to it with the text: "2. If you have 'Manage Teams and Projects' permission, click here." The main content area shows the 'Access' settings, with expandable sections for 'Teams (5)' and 'Projects (11)'. An 'Edit' button is visible at the bottom right of the main content area.

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)

2. If you have "Manage Teams and Projects" permission, click here.

Edit

The image shows a user profile interface for Lloyd Dobler. On the left is a dark sidebar with a user profile card and a list of navigation options. The profile card includes a circular profile picture with a crown icon, the name 'Lloyd Dobler', and contact information: 'ldobler@ahem.madcapsoftware.com', 'R&D', 'La Jolla, CA', '(123) 456-7890', and '(123) 098-7654'. The navigation menu includes 'Settings', 'Password', 'Access' (highlighted with a right-pointing arrow), 'Assign New Task', 'Activity', 'Permissions', 'Notifications', 'Deactivate', and 'Delete'. The main content area is titled 'Access' and contains two expandable sections: 'Teams (5)' and 'Projects (11)'. A callout box with a teal background and black border points to a teal 'Edit' button at the bottom of the sidebar. The callout contains the text '3. Click Edit.'.



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

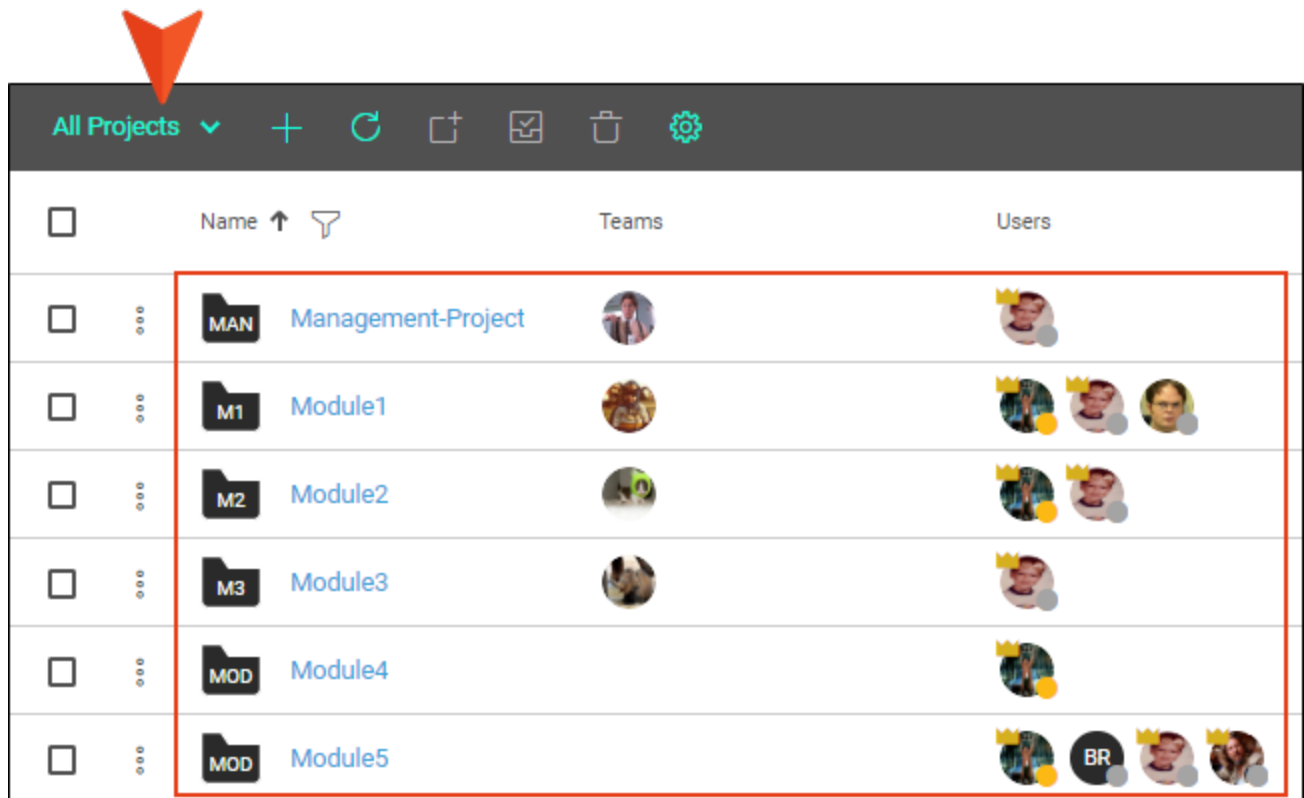
▼ Projects

- 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

Cancel Save


4. You can then associate yourself with any team or project.

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.



The screenshot shows a project management interface. At the top, there is a dark grey header bar with the text "All Projects" followed by a dropdown arrow, and several icons: a plus sign, a refresh icon, a square with a plus sign, a square with a checkmark, a trash can, and a gear. Below the header is a table with the following columns: "Name" (with an upward arrow and a filter icon), "Teams", and "Users". The table contains six rows of project data, each with a checkbox, a three-dot menu icon, a folder icon with a label (MAN, M1, M2, M3, MOD, MOD), a project name (Management-Project, Module1, Module2, Module3, Module4, Module5), a team icon, and user avatars. A red arrow points to the "All Projects" dropdown menu. A red box highlights the entire table content.

	Name ↑	Teams	Users
<input type="checkbox"/>	MAN Management-Project		
<input type="checkbox"/>	M1 Module1		
<input type="checkbox"/>	M2 Module2		
<input type="checkbox"/>	M3 Module3		
<input type="checkbox"/>	MOD Module4		
<input type="checkbox"/>	MOD Module5		



My Projects			
<input type="checkbox"/>	Name ↑	Teams	Users
<input type="checkbox"/>	Module1		
<input type="checkbox"/>	Module2		
<input type="checkbox"/>	Module4		
<input type="checkbox"/>	Module5		

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.

The screenshot shows the Project Dashboard for 'Module1'. The interface includes a sidebar with navigation options (Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users) and a main content area with several widgets. A callout box points to the 'Dashboard' tab in the top navigation bar, stating '1. Click here to open the Project Dashboard.' Another callout points to the 'Add Widgets' button in the top right, stating '2. Click this button.' A third callout points to the 'Add Widgets' dialog box, stating '3. Use this dialog to choose widgets to add.' A fourth callout points to the dashboard content, stating 'We've already added several widgets to this project dashboard.'

The 'Add Widgets' dialog box contains the following list of widgets:

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

The 'Add' button is located at the bottom of the dialog box.

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).

The screenshot shows the 'Builds' view in a software interface. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', 'Reports', and 'Translations'. Below this, there are tabs for 'Builds' and 'Schedules'. A 'Create Build' button is visible in the top right corner. The main area displays a table of builds with columns for ID, Branch, Target, Keep, Finished, Duration, State, and Progress. The table contains four rows of build data. Callouts provide detailed information about the interface elements and build status.

ID	Branch	Target	Keep	Finished	Duration	State	Progress
90206	feature3	All-About-Austin-HTML5	<input type="checkbox"/>	Nov 30, 2021 8:44 AM	00:00:14	Complete	<div style="width: 100%;"></div>
90080	feature1	All-About-Austin-HTML5	<input type="checkbox"/>	Nov 29, 2021 7:42 AM	01:13:11	Complete	<div style="width: 100%;"></div>
90076	feature1	All-About-Austin-HTML5	<input checked="" type="checkbox"/>	Nov 29, 2021 7:42 AM	16:33:26	Complete	<div style="width: 100%;"></div>
90059	feature2	All-About-Austin-HTML5	<input type="checkbox"/>	Nov 27, 2021 9:44 AM	00:00:13	Complete	<div style="width: 100%;"></div>

Callouts and their content:

- In this example, we've selected Builds.** (Points to the 'Builds' tab)
- Click here to generate a new build. You can select a specific branch and target.** (Points to the 'Create Build' button)
- Currently, the Builds grid is active, but you can also switch to Schedules to tell Central to automatically generate outputs in the future.** (Points to the 'Schedules' tab)
- This build is associated with a site for the purpose of setting it as "live," "private," or both.** (Points to the 'Sites' column for build 90206)
- Select one or more builds to take action on them.** (Points to the checkboxes in the 'Keep' column)
- Each build has an autogenerated ID. Click it to open the profile dialog for that build. You can see details and take various actions.** (Points to the ID '90206')
- The branch for each build is shown. If you are not using multiple branches, it will display master.** (Points to the 'Branch' column)
- This build has been set as "keep."** (Points to the checked checkbox in the 'Keep' column for build 90076)
- Click a build row to expand it and see more information.** (Points to the expand icon on the right of build 90206)
- By scrolling to the right, you can see more information, such as who generated a build, whether it originated from Central of Flare, errors, warnings, and more.** (Points to the right side of the build row)

Checklists

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

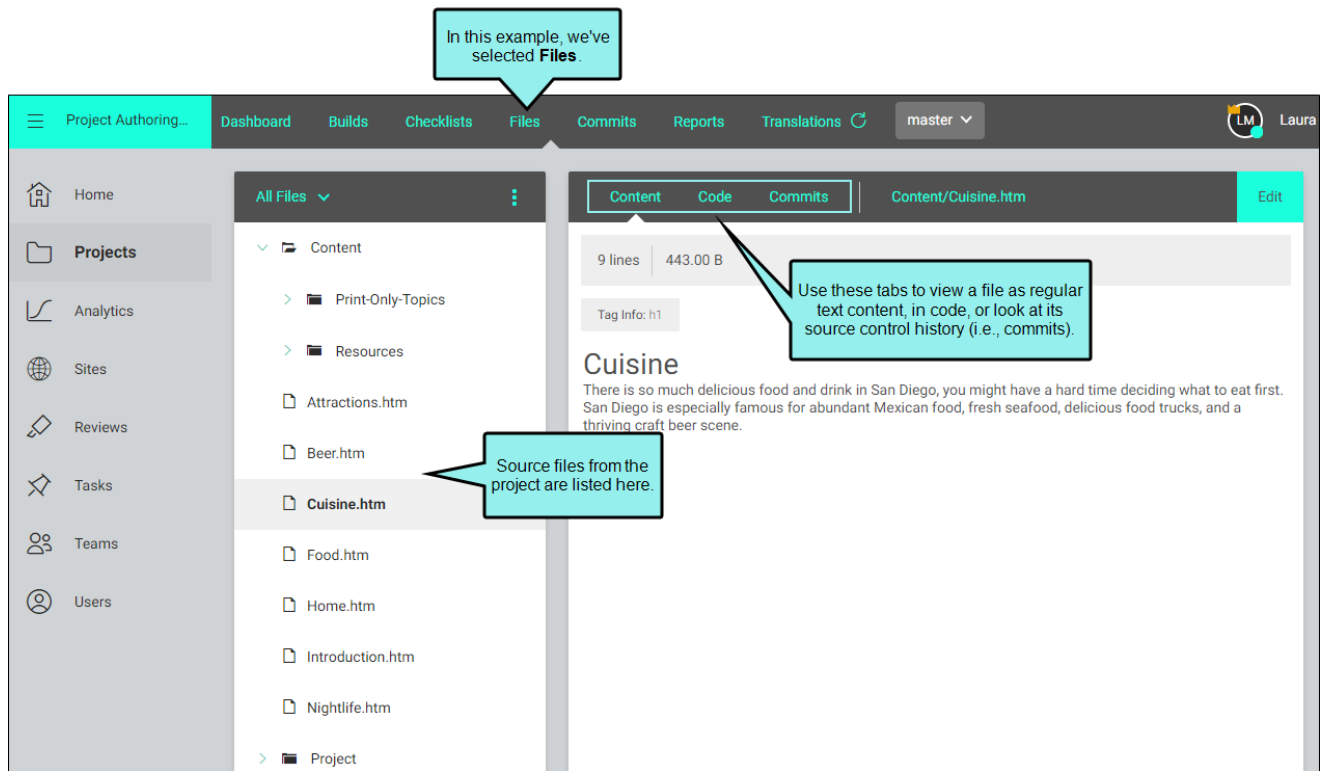
Checklists might have to do with specific files (e.g., topics) in your project. These are called “Project Files” checklists. You can create custom columns for whatever types of activity you want to track for each file, and you can use a note column for specific information about each row. Also, you can 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.

The screenshot shows the 'Checklists' section of a software interface. At the top, a navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', 'Reports', and 'Translations'. The 'Checklists' tab is active. On the left, a sidebar lists 'My Generic Checklist' (33.3%) and 'My Project Files Checklist' (29.4%). The main area displays 'My Generic Checklist' with a 'Show Charts' toggle. A donut chart shows 33% Complete, 50% In Progress, and 17% To Do. Below the chart is a table with columns for 'Items', 'Michael', 'Sally', and 'Note'. The table lists 'Research', 'Fix Bugs', and 'Run Reports' with status indicators for each user. Callouts provide instructions: 'In this example, we've selected Checklists.', 'Click to create a new checklist -- generic or based on project files.', 'Click to create and manage templates, which are useful if you create lots of checklists that contain the same rows or columns.', 'This area shows charts and data related to the progress of your checklist.', 'Click here to edit the checklist.', 'Click to show/hide charts for the checklist.', 'Click arrow for different types of charts (i.e., total % complete, checklist item % complete, and checklist completion table).', 'Checklists are listed here.', 'Use this area to work with an open checklist.', and 'Statuses -- To Do, In Progress, Complete, N/A'.

Items	Michael	Sally	Note
Research	✓	✓	Click to add a note
Fix Bugs	🕒	🕒	Click to add a note
Run Reports	🕒	🕒	Click to add a note

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.

In this example, we've selected **Commits**.

All of the commits are listed, with the most recent at the top.

If you click a commit on the left, you can view more details about a commit, including file differences.

The screenshot shows a web interface with a navigation bar at the top containing 'Module5', 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', 'Reports', 'Translations', and a 'master' dropdown. The 'Commits' section is active. On the left, a list of commits is shown, with the most recent at the top. The selected commit is 'Commit of Content/B-Feature-Topics/Feature1.htm' by Paul Stoecklein, committed a year ago. The right pane shows the file 'Content/B-Feature-Topics/Feature1.htm' with a diff view. The diff shows a change on line 45, where a line was added: '<p>Correct. Austin's climate is considered humid subtropical.</p>'. The diff also shows a change on line 45, where a line was removed: '<p>Correct. </p>'. The diff view includes line numbers and a 'CHANGED' indicator.

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.

In this example, we've selected **Reports**.

Critical reports with the number of issues (if any) from the most recent scan are listed here.

Statistical categories are listed here.

A chart showing the results of each push.

A grid listing the information related to the selected report or statistical category on the left.

The interface shows a navigation bar with 'Reports' selected. The left sidebar lists 'Critical Reports' and 'Stats'. The main area displays a bar chart for 'Broken Links' and a table of 'Latest Scan Results'.

Folder	File	Link	Link Text	Link Tag	Extension	Type
Content/B-Feature	Feature1.htm	Content/D-Referen	Tips	MadCap:ref	htm	Missing Link
Content/B-Feature	Feature1.htm	Content/D-Referen	Tips	Ma		Link
Content/B-Feature	Feature3.htm	Content/D-Referen	Tips			Link
Content/B-Feature	Features.htm	Content/D-Referen	Tips	Ma		Link
Content/C-Procedi	Procedure1.htm	Project/VariableSe				Missing Link
Content/C-Procedi	Procedure1.htm	Content/D-Referen	Tips	MadCap:ref	htm	Missing Link

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.

View language branch information according to package.

View language branch information individually.

Click the vertical three-dot menu for options.

Multiple languages can be associated with a package.

	Name	Targets	Source Branch	Due Date	Target Language	Method	Status
<input type="checkbox"/>	Project2	1 target	master	Sep 28, 2024	2 languages		New
<input checked="" type="checkbox"/>	Project	1 target	master	Sep 20, 2024	3 languages		In Progress
<input type="checkbox"/>	Test-Austin	1 target	master	Oct 23, 2024	2 languages		New
<input type="checkbox"/>	Waterloo	1 target	master	Sep 03, 2024	1 language	Manual	Sent

View language branch information individually.

Select a row to enable toolbar options.

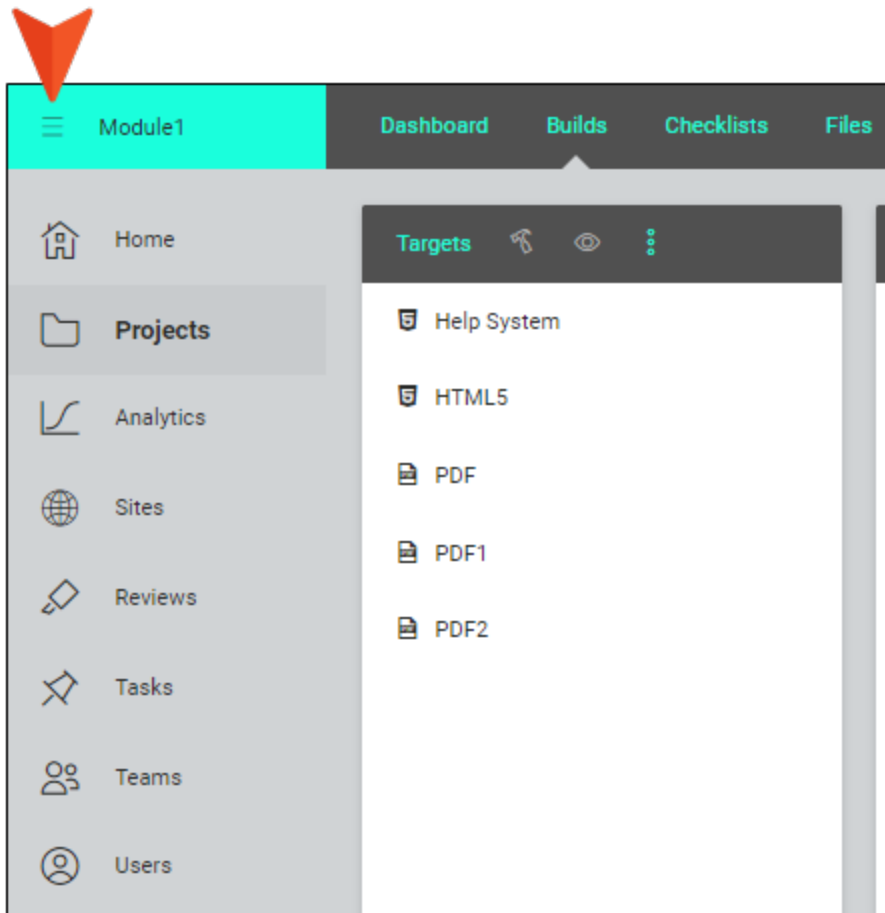
Each row is a translation branch with a language associated to it.

Manage and monitor status of the translation branch.

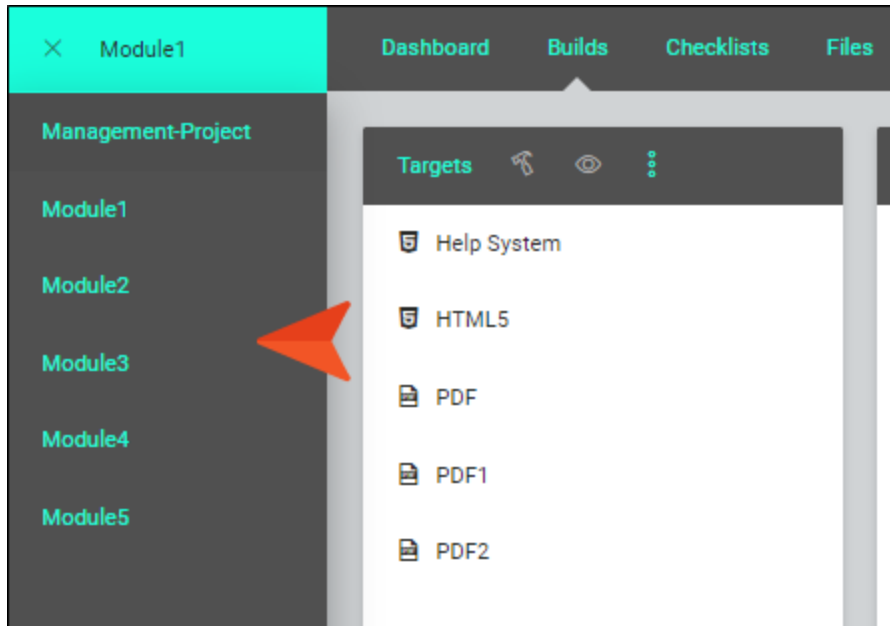
	Name	Target Language	Method	Status	Last Downloaded	Last Uploaded	Translation Package
<input type="checkbox"/>	Czech [cs]	Czech [cs]	Manual	New			
<input checked="" type="checkbox"/>	Greek [el]	Greek [el]	Manual	New	Sep 20, 2024 10:24 AM		
<input type="checkbox"/>	German [de]	German [de]	Manual	Received	Sep 09, 2024 10:24 AM	Sep 09, 2024 1:06 PM	
<input type="checkbox"/>	French [fr]	French [fr]	Manual	New	Sep 09, 2024 10:24 AM		
<input type="checkbox"/>	Japanese [ja]	Japanese [ja]		Sent			
<input type="checkbox"/>	Italian [it]	Italian [it]		New			

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.



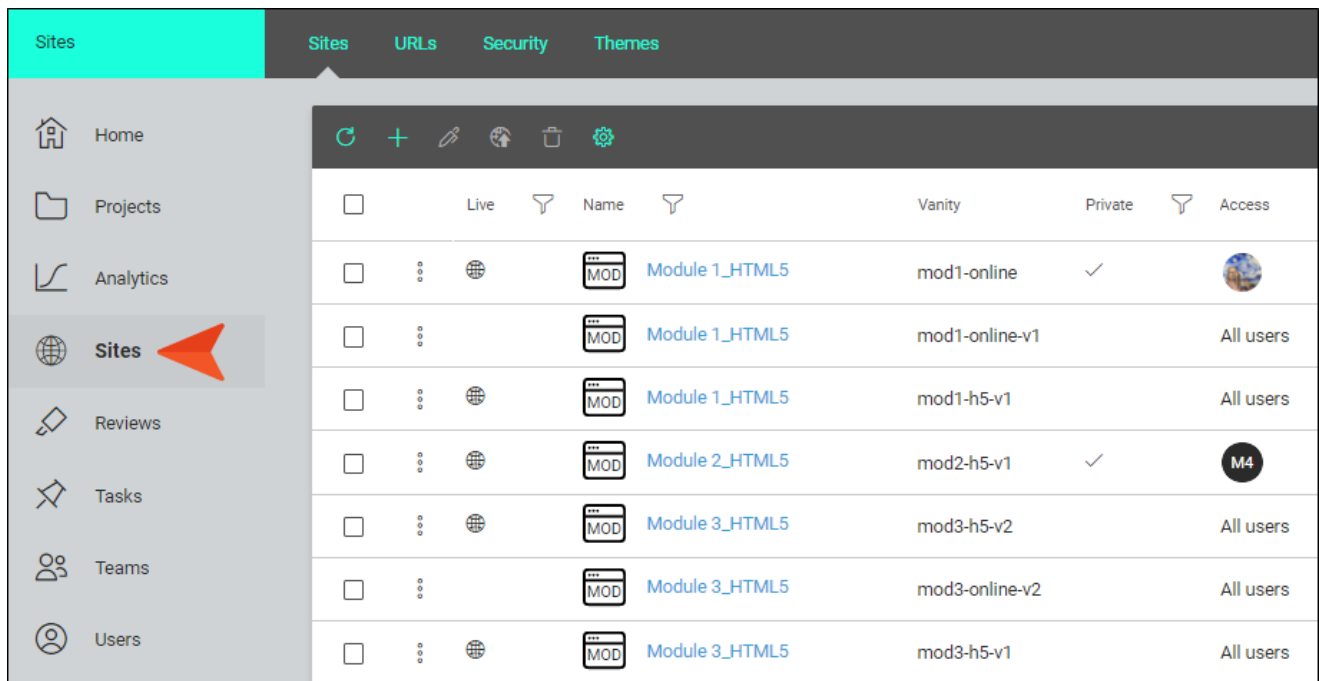
From this drop-down, you can quickly navigate to any other projects that you have permission to open. This is quicker than going back to the main Projects page grid to open another project.



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.

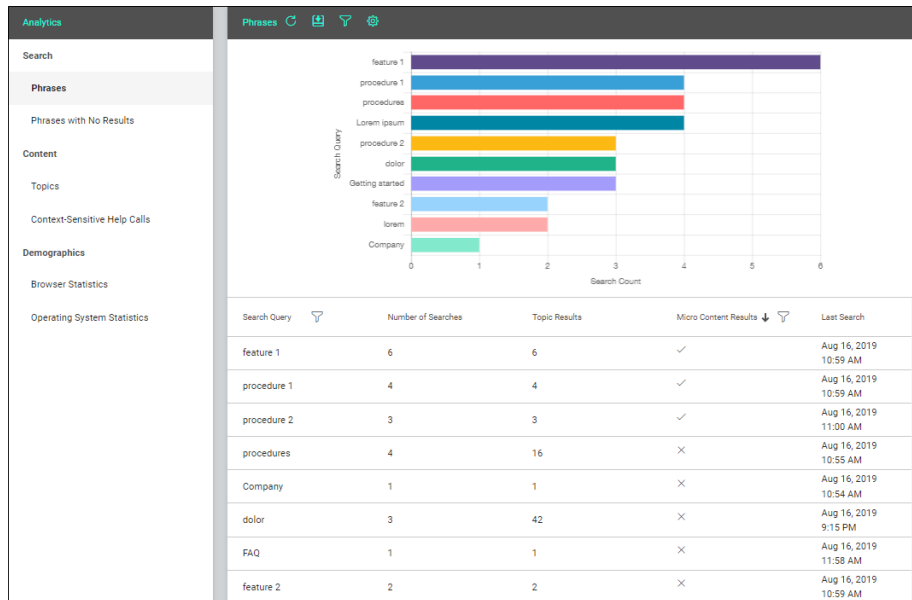


<input type="checkbox"/>	Live	Name	Vanity	Private	Access
<input type="checkbox"/>		Module 1_HTML5	mod1-online	✓	
<input type="checkbox"/>		Module 1_HTML5	mod1-online-v1		All users
<input type="checkbox"/>		Module 1_HTML5	mod1-h5-v1		All users
<input type="checkbox"/>		Module 2_HTML5	mod2-h5-v1	✓	
<input type="checkbox"/>		Module 3_HTML5	mod3-h5-v2		All users
<input type="checkbox"/>		Module 3_HTML5	mod3-online-v2		All users
<input type="checkbox"/>		Module 3_HTML5	mod3-h5-v1		All users

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).

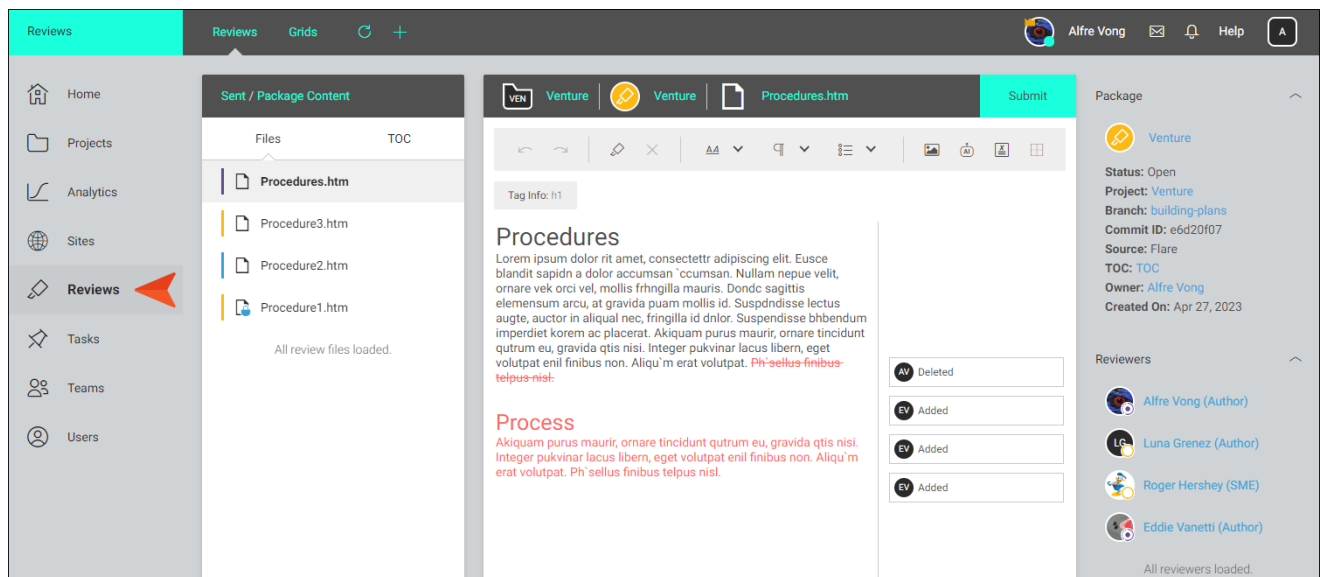


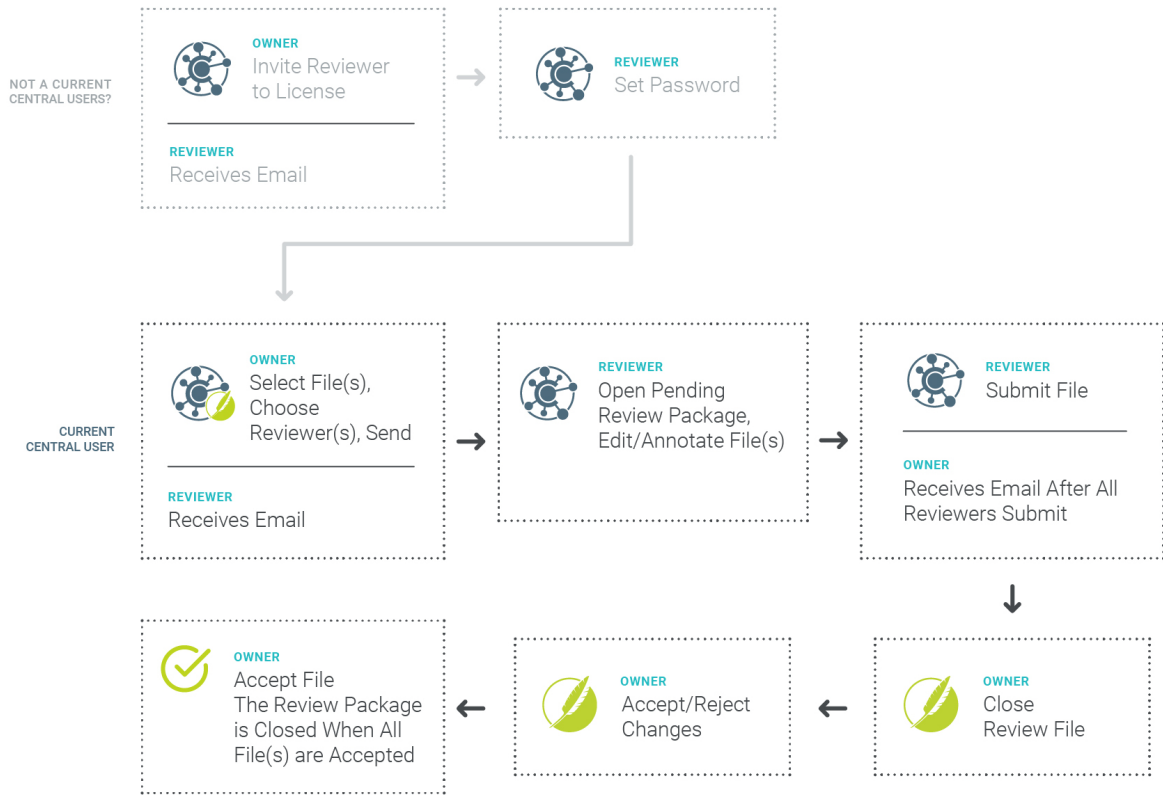
Analytics works on projects located in Central, or you can host output on your own servers. If you host the output outside of Central, you still need to use Central with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Central (e.g., not be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

CHAPTER 8

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).





Benefits of this review workflow include:

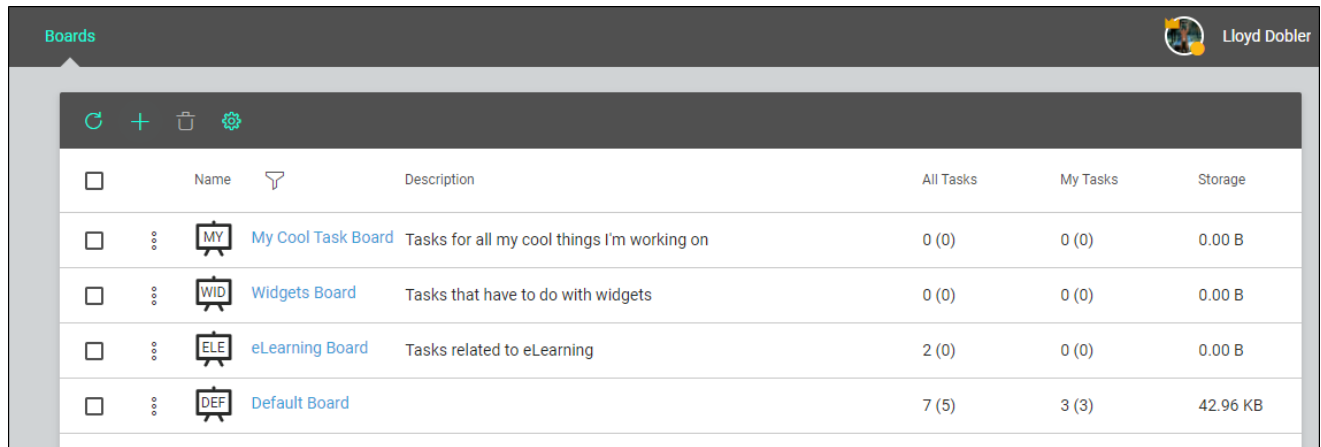
- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version 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).

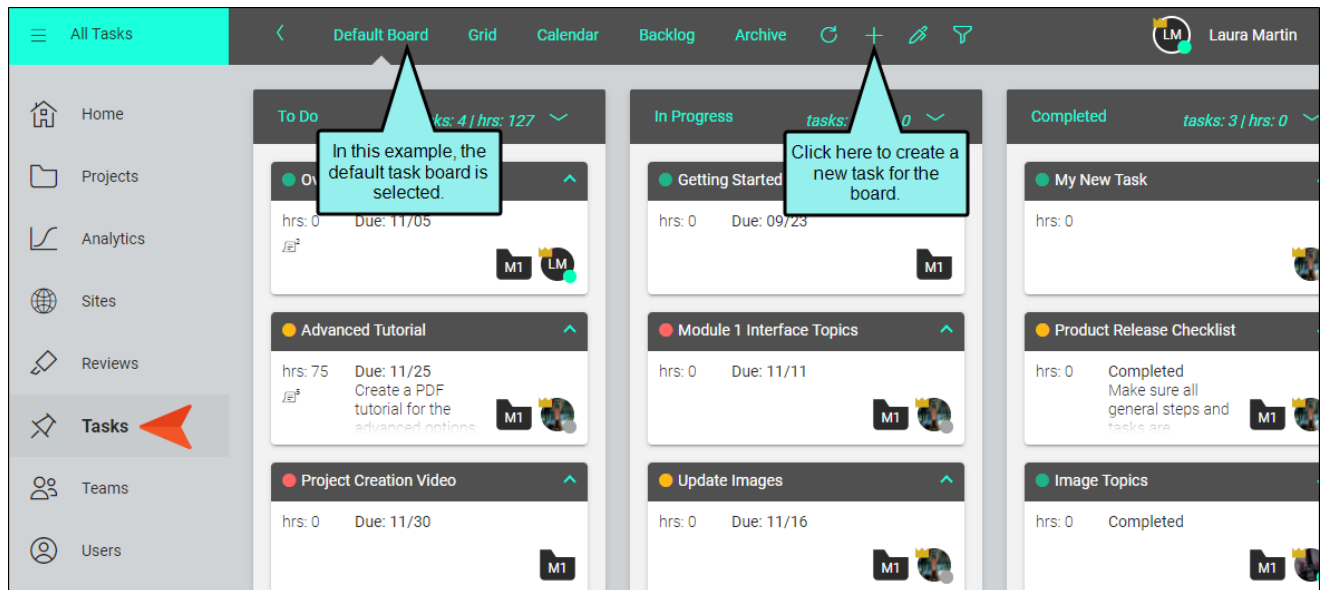
In the All Tasks and My Tasks columns, you will see two numbers. The first number indicates how many active tasks are associated with the board. The number in parentheses indicates how many inactive tasks are associated with the board; in other words, these are tasks that have been moved to either Backlog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



The screenshot shows the 'Boards' interface in Central. At the top, there is a header with the word 'Boards' on the left and a user profile icon for 'Lloyd Dobler' on the right. Below the header is a toolbar with icons for refresh, add, delete, and settings. The main content is a table with the following columns: Name, Description, All Tasks, My Tasks, and Storage. The table lists four boards: 'My Cool Task Board', 'Widgets Board', 'eLearning Board', and 'Default Board'. Each board has a checkbox, a menu icon, and a board icon. The 'All Tasks' and 'My Tasks' columns show two numbers: the first is the total number of tasks, and the second in parentheses is the number of inactive tasks.

<input type="checkbox"/>	Name	Description	All Tasks	My Tasks	Storage
<input type="checkbox"/>	 My Cool Task Board	Tasks for all my cool things I'm working on	0 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 Widgets Board	Tasks that have to do with widgets	0 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 eLearning Board	Tasks related to eLearning	2 (0)	0 (0)	0.00 B
<input type="checkbox"/>	 Default Board		7 (5)	3 (3)	42.96 KB

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 X

Reference Topics

Move | Delete

● Low Priority ▼ Start: [calendar icon] [time picker]

Status: To Do ▼ Due: [calendar icon] [time picker]

[list icon] (0) [tag icon] (0) 0 hrs 6 pos All Day Event

Task Board: Default Board ▼

Owner: Lloyd Dobler ▼

Project:

Assigned: Lloyd Dobler ▼

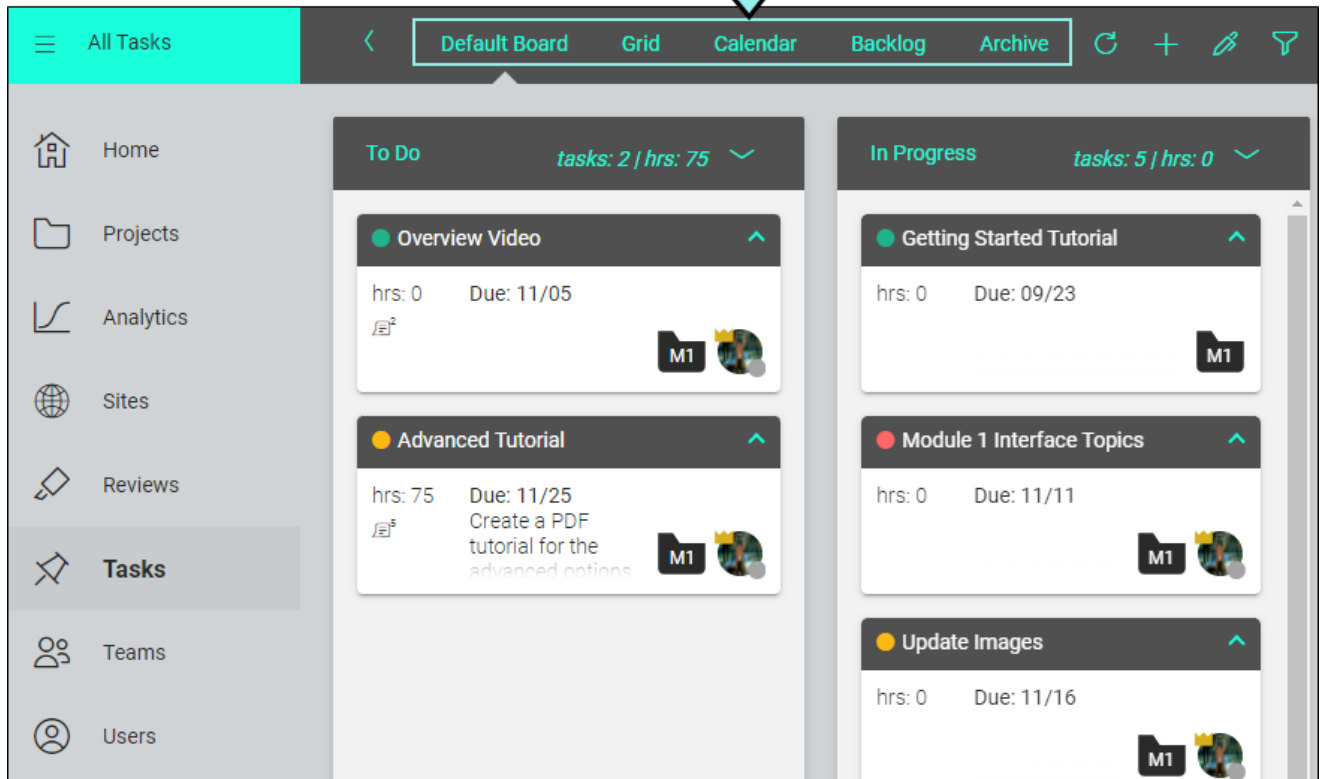
Description:

[undo] [redo] | [font size] ▼ | [link] [unlink] | [search] ▼ [list] ▼

By default, the task is assigned to yourself. You can click this drop-down to assign it to someone else.

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

Multiple ways to view tasks.

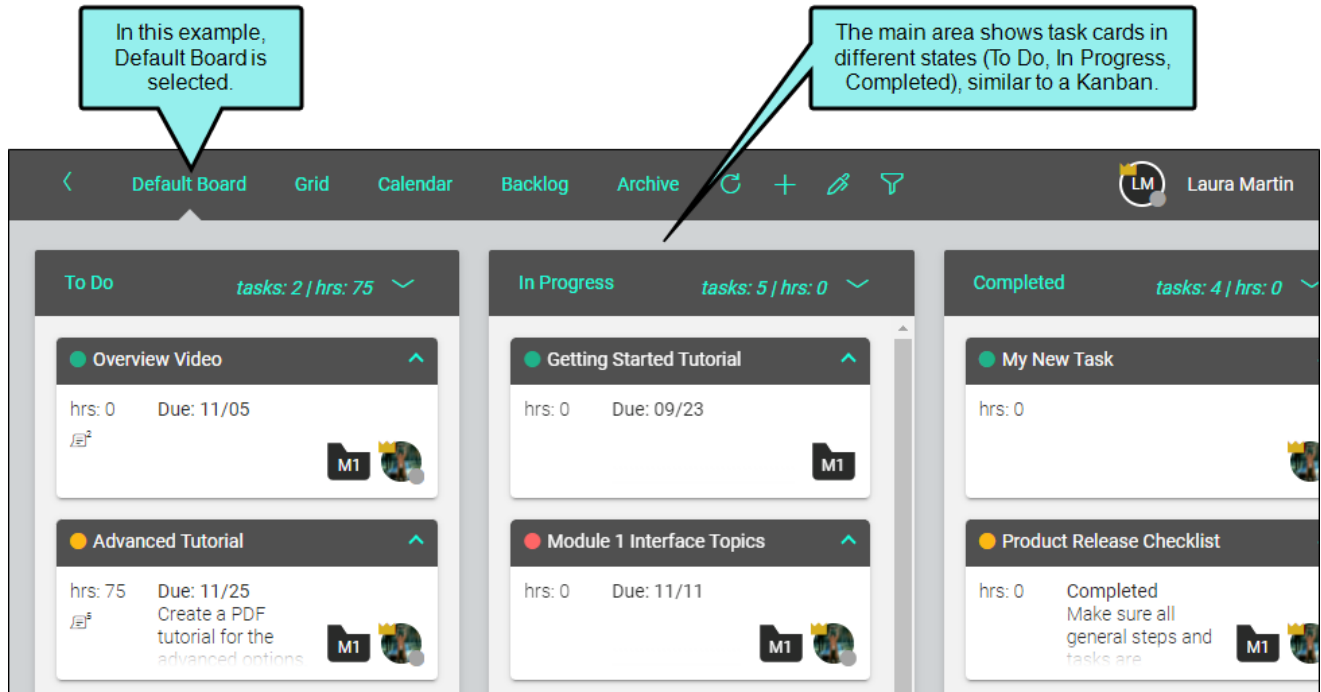


This chapter discusses the following:

Board	52
Grid	58
Calendar	59
Backlog	62
Archive	63

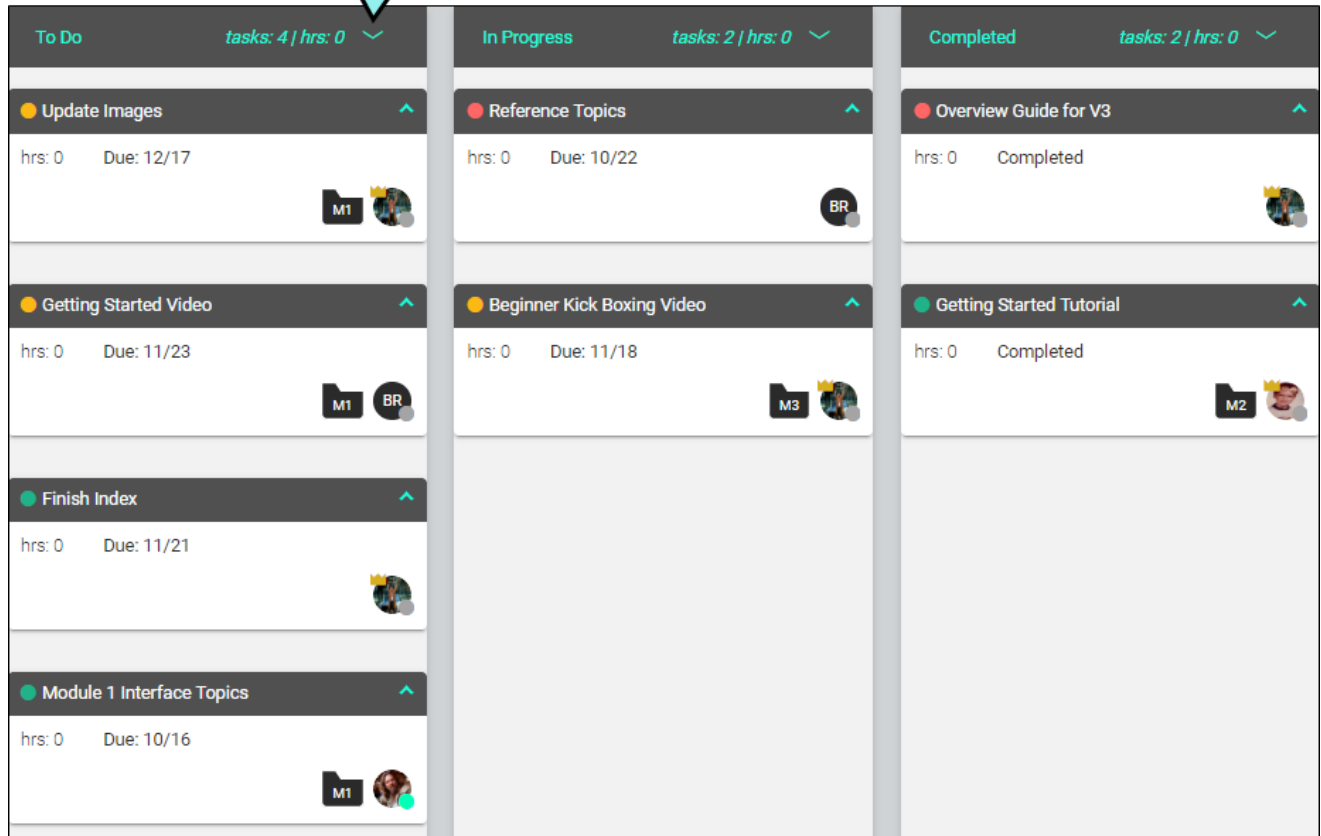
I Board

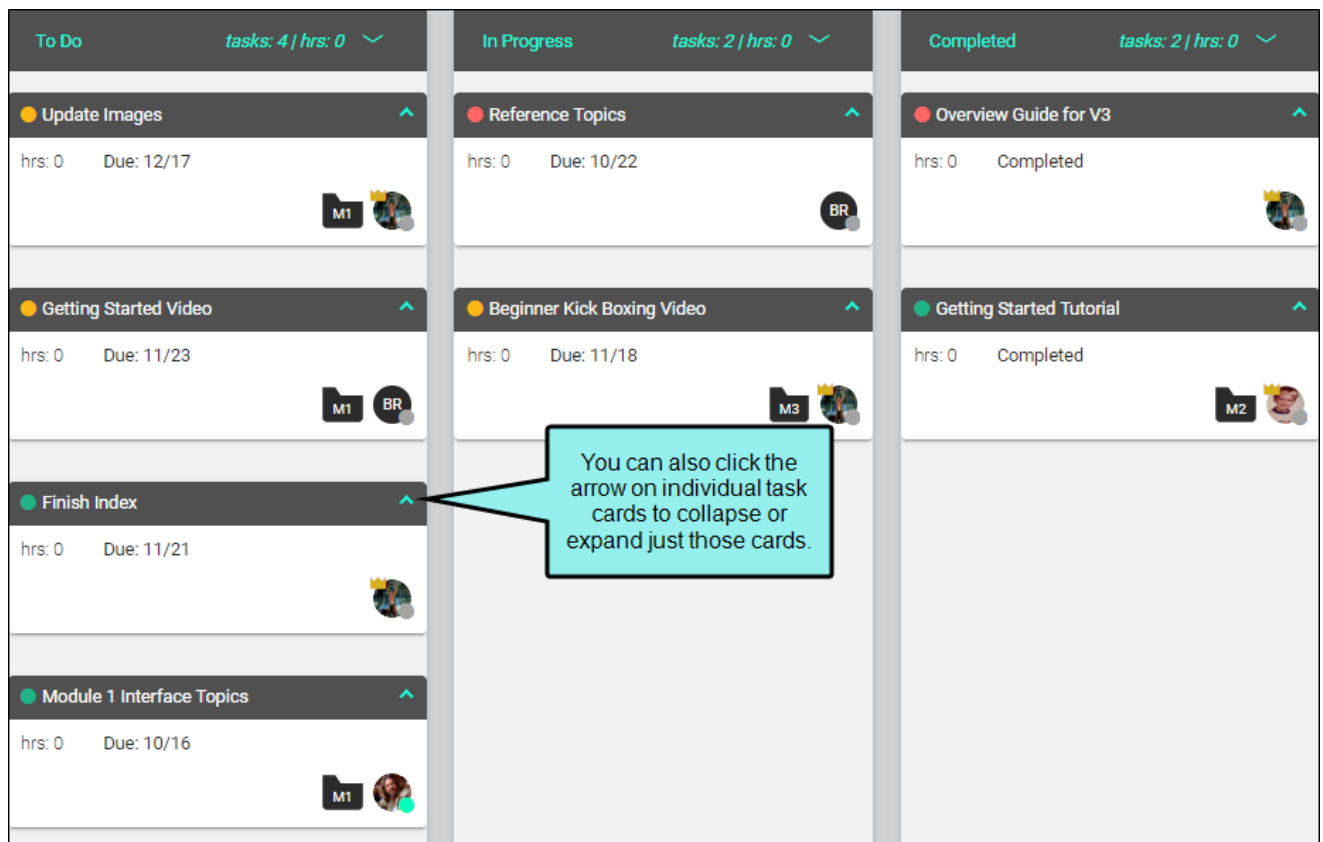
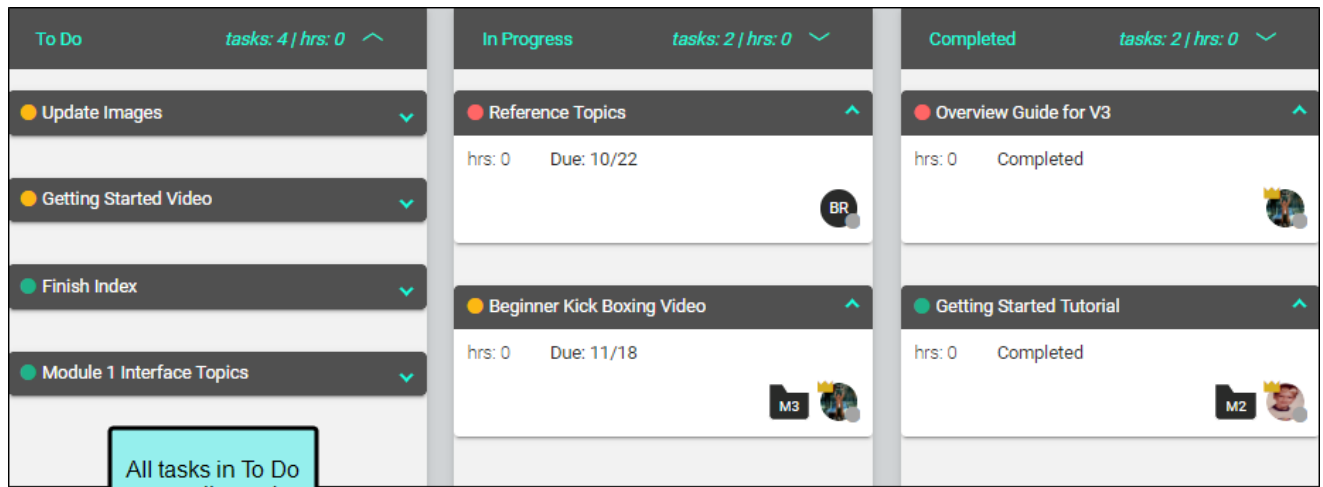
The task board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to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



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

You can click the arrow at the top to collapse or expand all tasks in a milestone.

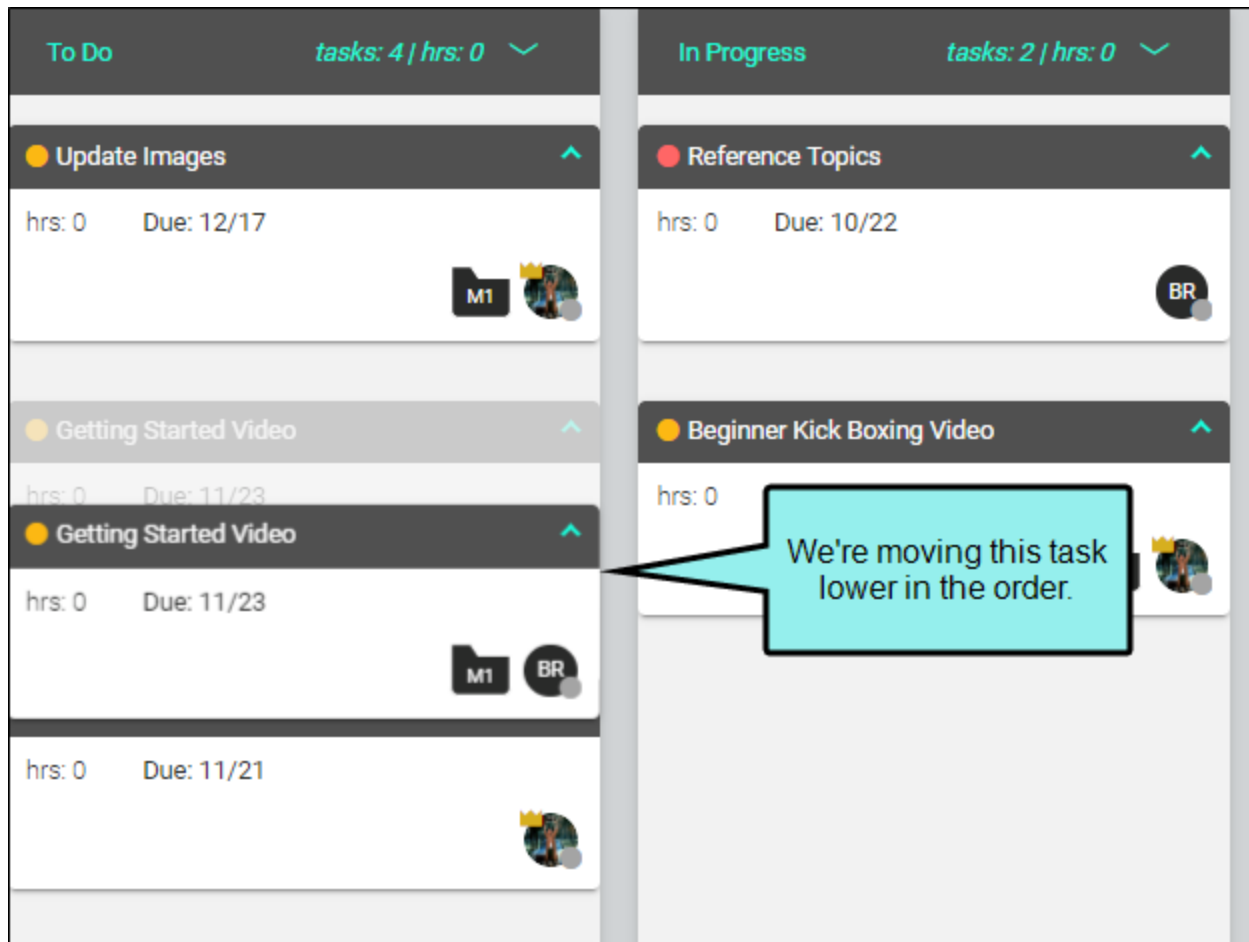




The image shows a Kanban board with three columns: **To Do** (4 tasks, 0 hours), **In Progress** (2 tasks, 0 hours), and **Completed** (2 tasks, 0 hours). Each task card displays its title, status, due date, and assignee. A callout box highlights two collapsed task cards in the In Progress column.

Column	Task Title	Status	Due Date	Assignee	Notes
To Do	Update Images	Open	12/17	M1	
To Do	Getting Started Video	Collapsed			
To Do	Finish Index	Collapsed			
To Do	Module 1 Interface Topics	Open	10/16	M1	
In Progress	Reference Topics	Open	10/22	BR	
In Progress	Beginner K...	Collapsed			Just these two task cards are collapsed.
Completed	Overview Guide for V3	Completed			
Completed	Getting Started Tutorial	Completed		M2	

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



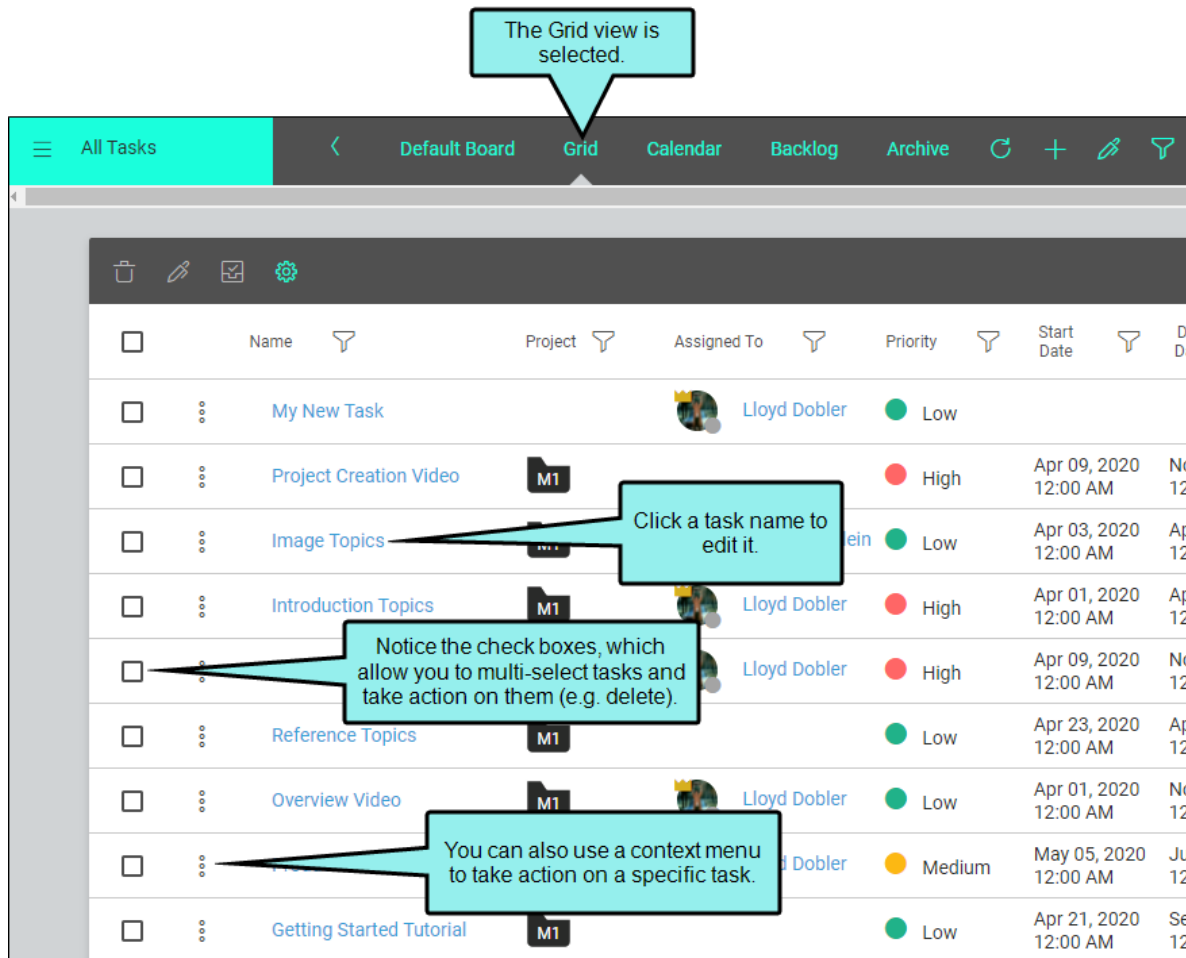
The image shows a Kanban-style task board with two columns: 'To Do' and 'In Progress'. Each column has a header with a task count and a dropdown arrow. The 'To Do' column contains three tasks, and the 'In Progress' column contains two tasks. A callout box points to the 'Getting Started Video' task in the 'To Do' column.

Column	Task Name	Hours	Due Date	Assignee	Location
To Do	Update Images	0	12/17	M1	BR
To Do	Finish Index	0	11/21	BR	
To Do	Getting Started Video	0	11/23	M1	BR
In Progress	Reference Topics	0	10/22	BR	
In Progress	Beginner Kick Boxing Video	0	11/18	M3	BR

New location for this task.

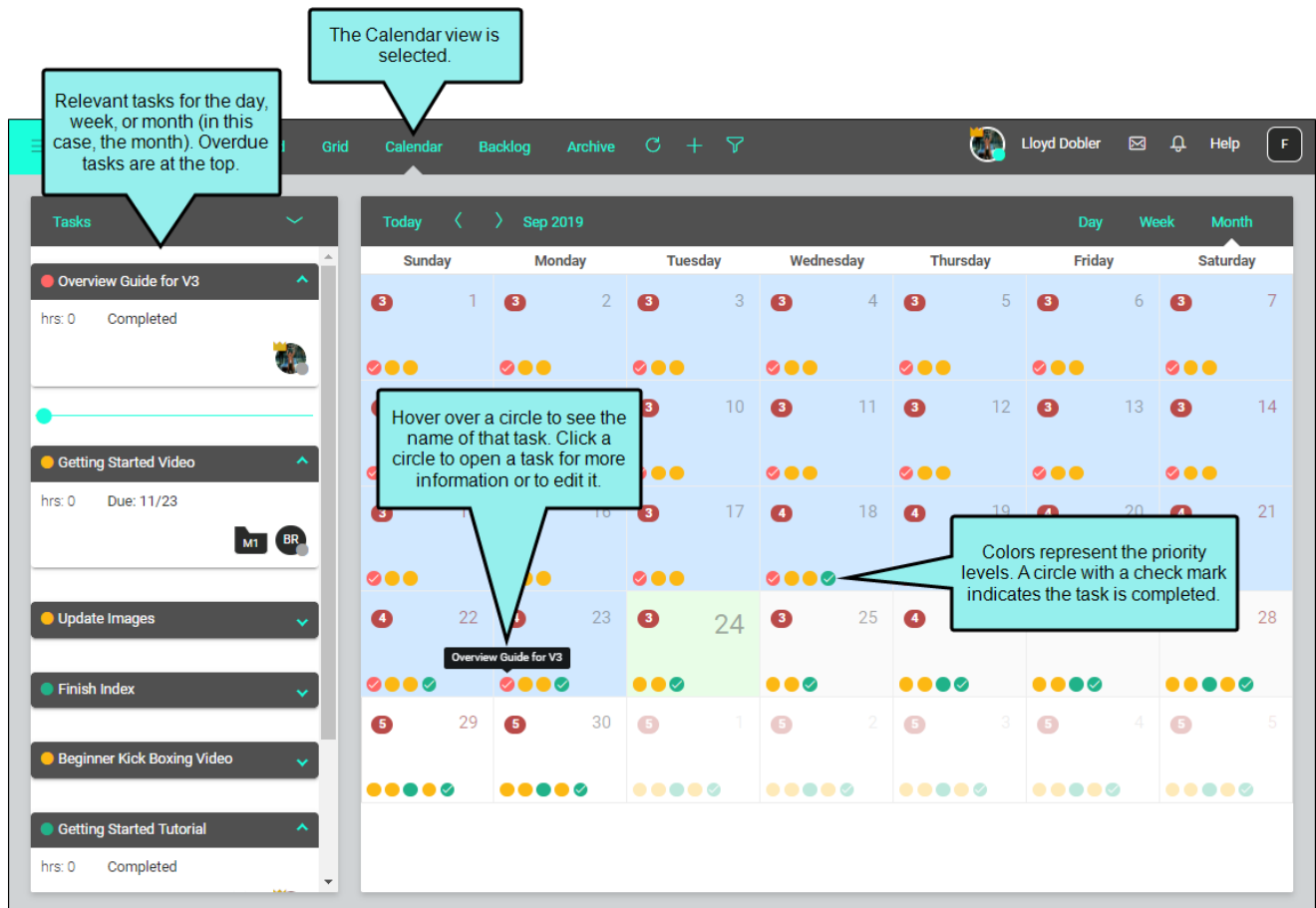
Grid

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.



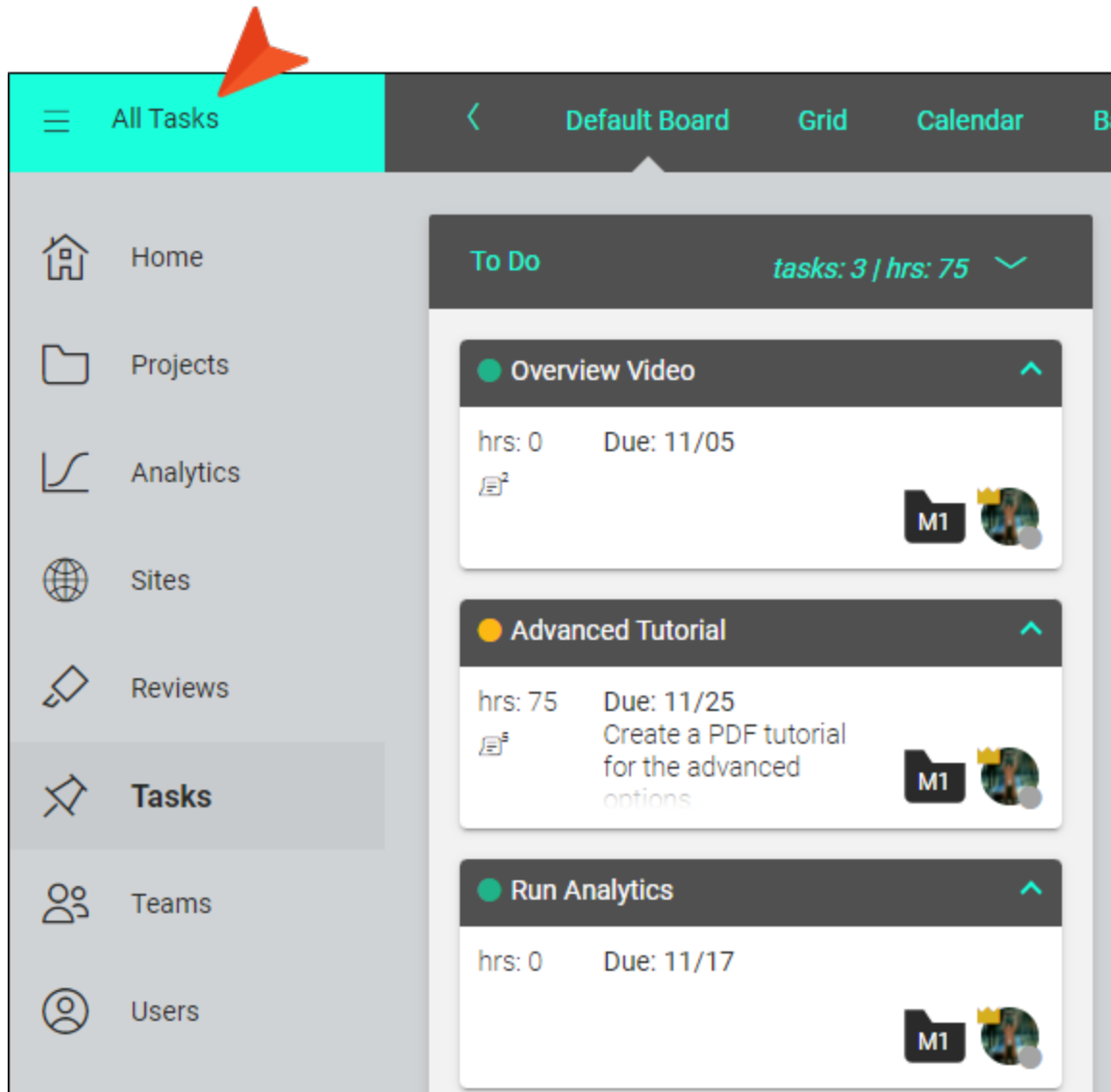
Calendar

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.

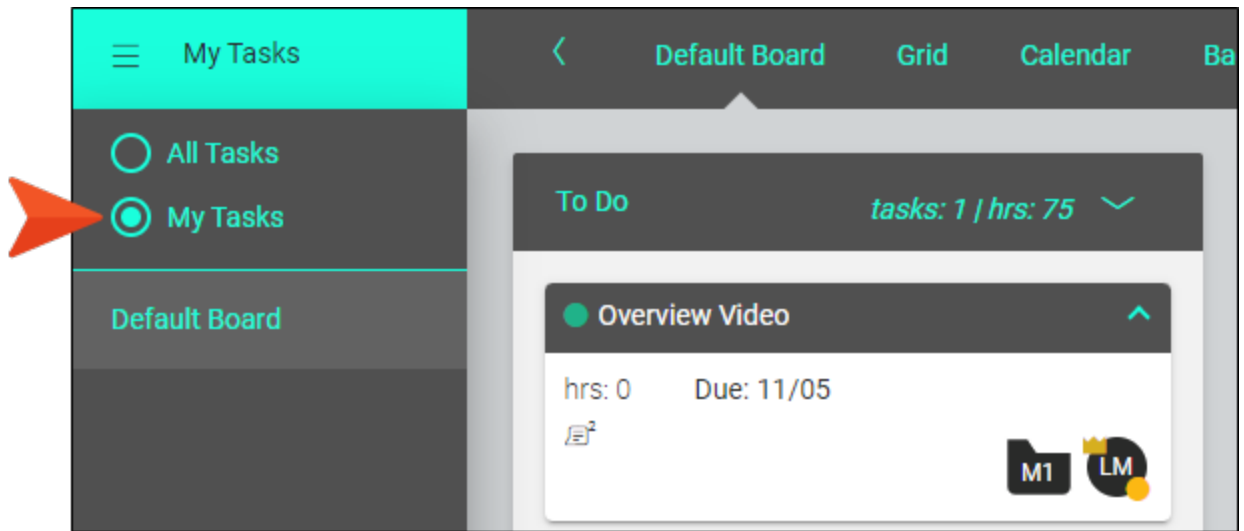


Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and 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**.

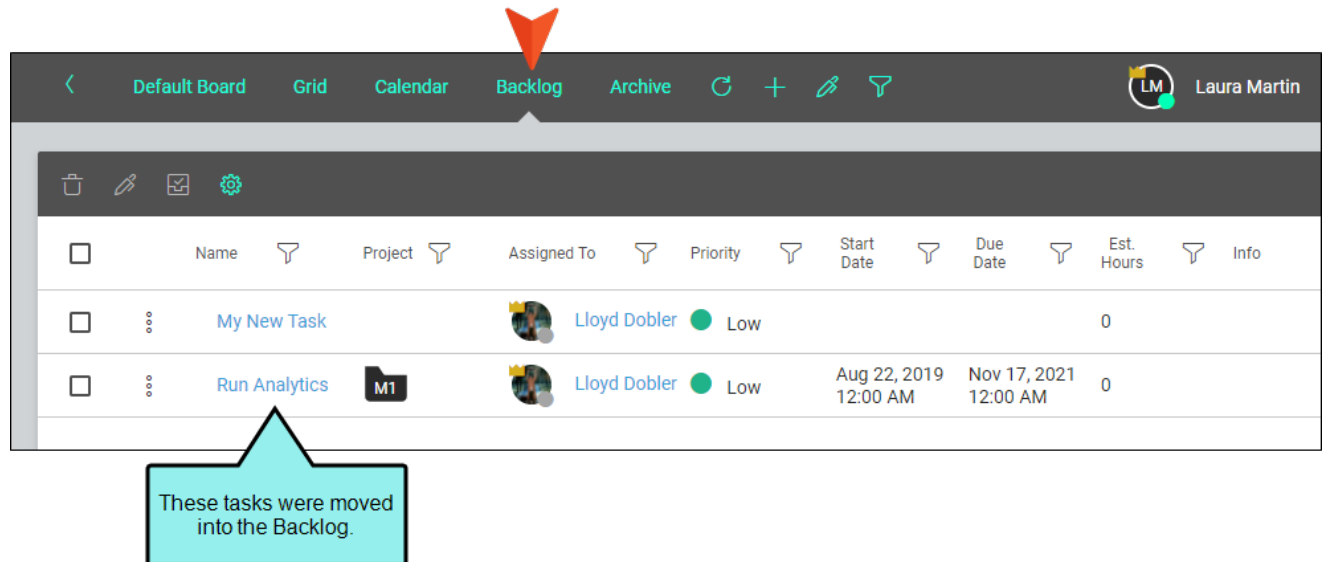


Then, in the flyout menu, you can select **My Tasks**.



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.



The screenshot displays the Backlog view of a project management tool. The navigation bar at the top includes options for Default Board, Grid, Calendar, Backlog (selected), and Archive. The task list below has the following columns: Name, Project, Assigned To, Priority, Start Date, Due Date, and Est. Hours. Two tasks are visible:

Name	Project	Assigned To	Priority	Start Date	Due Date	Est. Hours
My New Task		Lloyd Dobler	Low			0
Run Analytics	M1	Lloyd Dobler	Low	Aug 22, 2019 12:00 AM	Nov 17, 2021 12:00 AM	0

A callout box with a blue border and white background points to the tasks, containing the text: "These tasks were moved into the Backlog."

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.

The screenshot shows the 'Archive' view of a task management application. The navigation bar at the top includes 'Default Board', 'Grid', 'Calendar', 'Backlog', and 'Archive'. The 'Archive' tab is selected, indicated by a red arrow. Below the navigation bar, there is a toolbar with icons for trash, edit, checkmark, and settings. The main area displays a table of tasks with columns for Name, Project, Assigned To, Priority, Start Date, Due Date, and Est. Hours. Two tasks are listed: 'Introduction Topics' (assigned to Lloyd Dobler) and 'Side Nav' (assigned to Paul Stoecklein). A callout box with a red border and a red arrow pointing to the tasks contains the text: 'These tasks were moved into the Archive.'

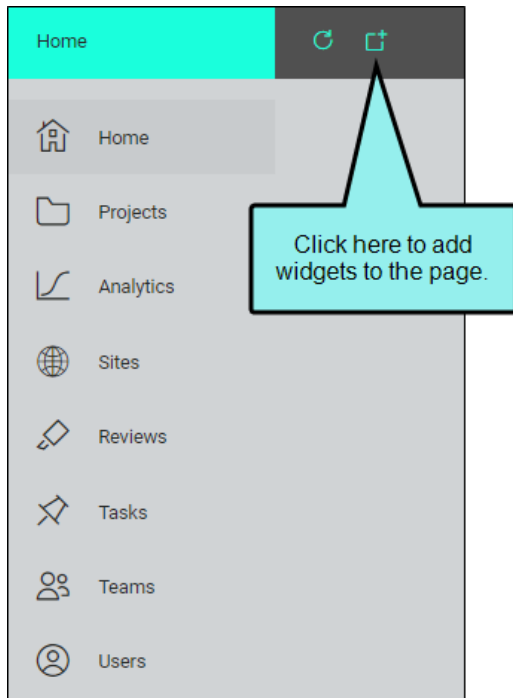
Name	Project	Assigned To	Priority	Start Date	Due Date	Est. Hours
Introduction Topics	M1	Lloyd Dobler	High	Apr 01, 2020 12:00 AM	Apr 21, 2020 12:00 AM	0
Side Nav	M1	Paul Stoecklein	High	Aug 05, 2019 12:00 AM	Mar 19, 2020 12:00 AM	0

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.

In this example, we've added three different widgets to the Home page.

The Storage and Usage widget lets you view and manage your space and seats on the license.

The Bookmarks widget lets you quickly open certain project pages.

The Live Sites widget lets you see any outputs that are published for people to see.

The dashboard interface includes a left sidebar with navigation options: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, and Users. The main content area features three widgets: 'Storage and Usage' with circular gauges for Source Files (27 MB), Builds (178 MB), Tasks (0 B), and Misc (2 MB); 'Bookmarks' with a list of modules (M1-M4); and 'Live Sites' with a table of project outputs.

Name	Project	Target	Vanity	Live Date
Mod 1 HTML5 V2	Module1	HTML5	mod1-h5-v2	Feb 14, 2021 5:33 PM
Mod 1 HTML5 V1	Module1	HTML5	mod1-h5-v1	Feb 14, 2021 5:13 PM
Mod 1 Help V1	Module1	Help System	mod1-help-v1	Feb 12, 2021 3:38 PM
Mod 1 Help V3	Module1	Help System	mod1-help-v3	Feb 12, 2021 2:39 PM
Mod 1 Help V2	Module1	Help System	mod1-help-v2	Feb 12, 2021 2:39 PM

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.

In this example, we've added two Task Summary widgets.

Click here to filter a widget, as well as to perform other actions, such as duplicating or deleting a widget.

This widget has been filtered to show tasks for one user.

And this widget has been filtered to show tasks for another user.

Task Status	Count	Percentage
To Do	0	0%
In Progress	3	75%
Complete	0	0%
Backlog	0	0%
Archive	1	25%

Task Status	Count	Percentage
To Do	1	33%
In Progress	1	33%
Complete	0	0%
Backlog	1	33%
Archive	0	0%

APPENDIX

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