MADCAP CENTRAL

Getting Started Guide

THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 6

CHAPTER 7

CHAPTER 8

CHAPTER 9

CHAPTER 10

CHAPTER 11

APPENDIX

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.
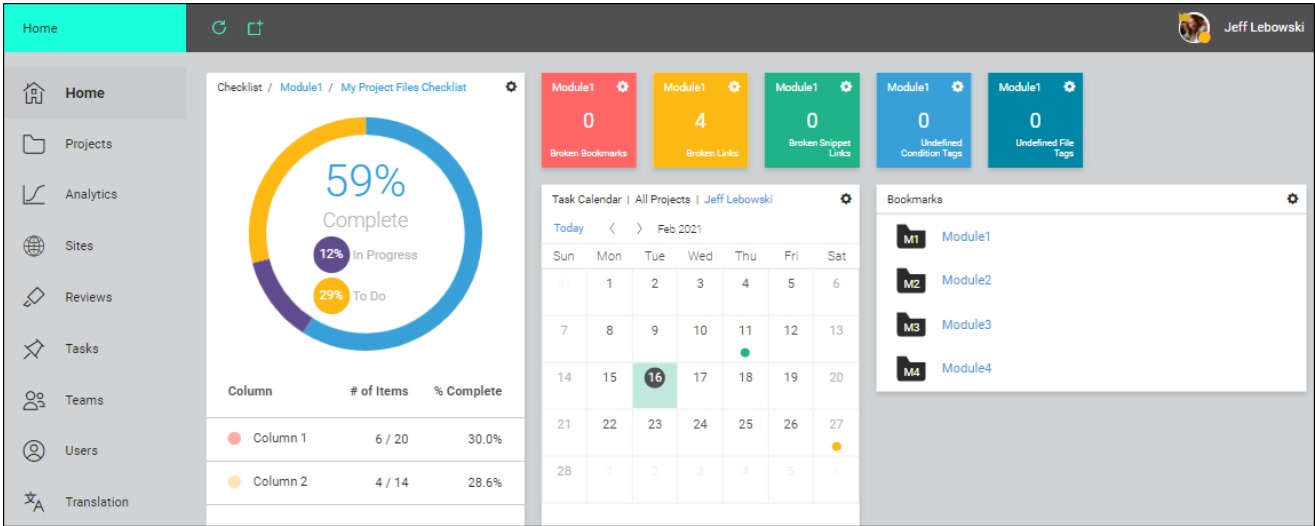
This guide discusses the following:

- **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 upload Flare 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 41.

- **Analytics** View user activity on published Flare HTML5 output. See "Analytics" on page 42.

- **Reviews** Take a look at how you can view, edit, and manage Flare review files. See "Reviews" on page 44.

- **Tasks** Understand how tasks can help you manage your workload and processes. See "Tasks" on page 47.

- **Translation** Request a quote to have your projects and files translated into other languages. See "Translation" on page 63.

- **Widgets** Learn how to insert information objects (widgets) into your Home and Project dashboards. See "Widgets" on page 65.

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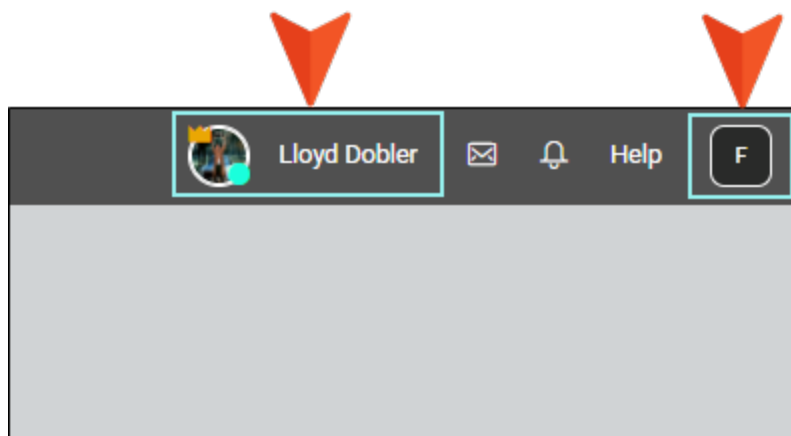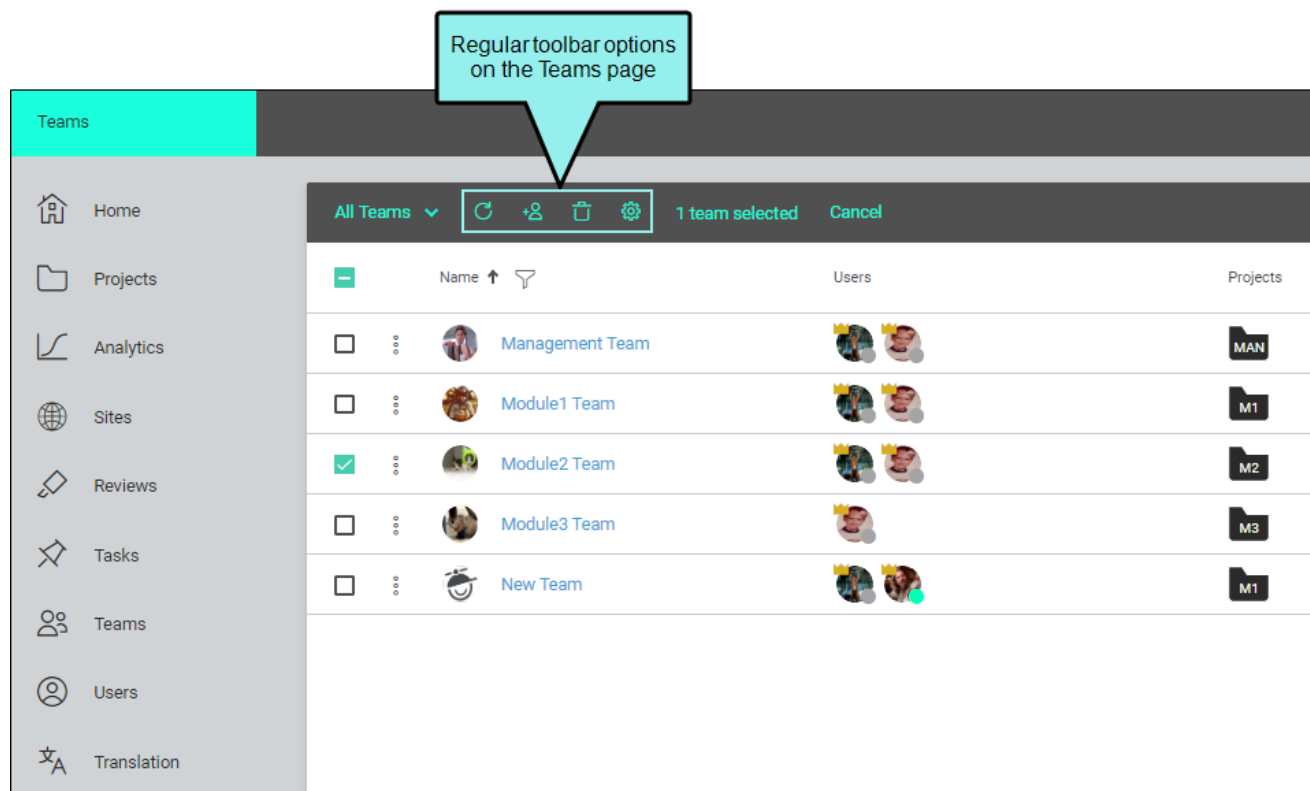
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Tasks, Reviews, Teams, Users, and Translation.
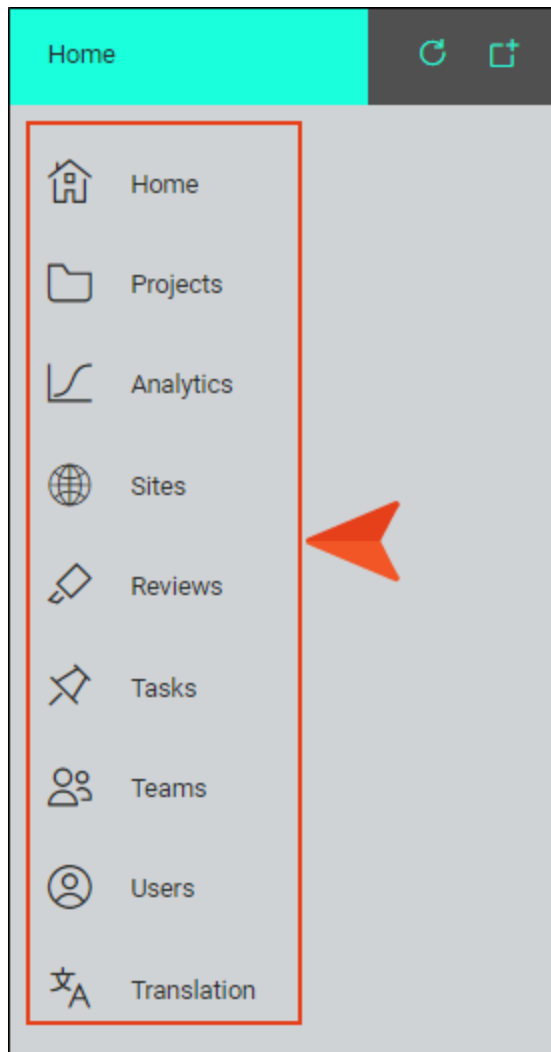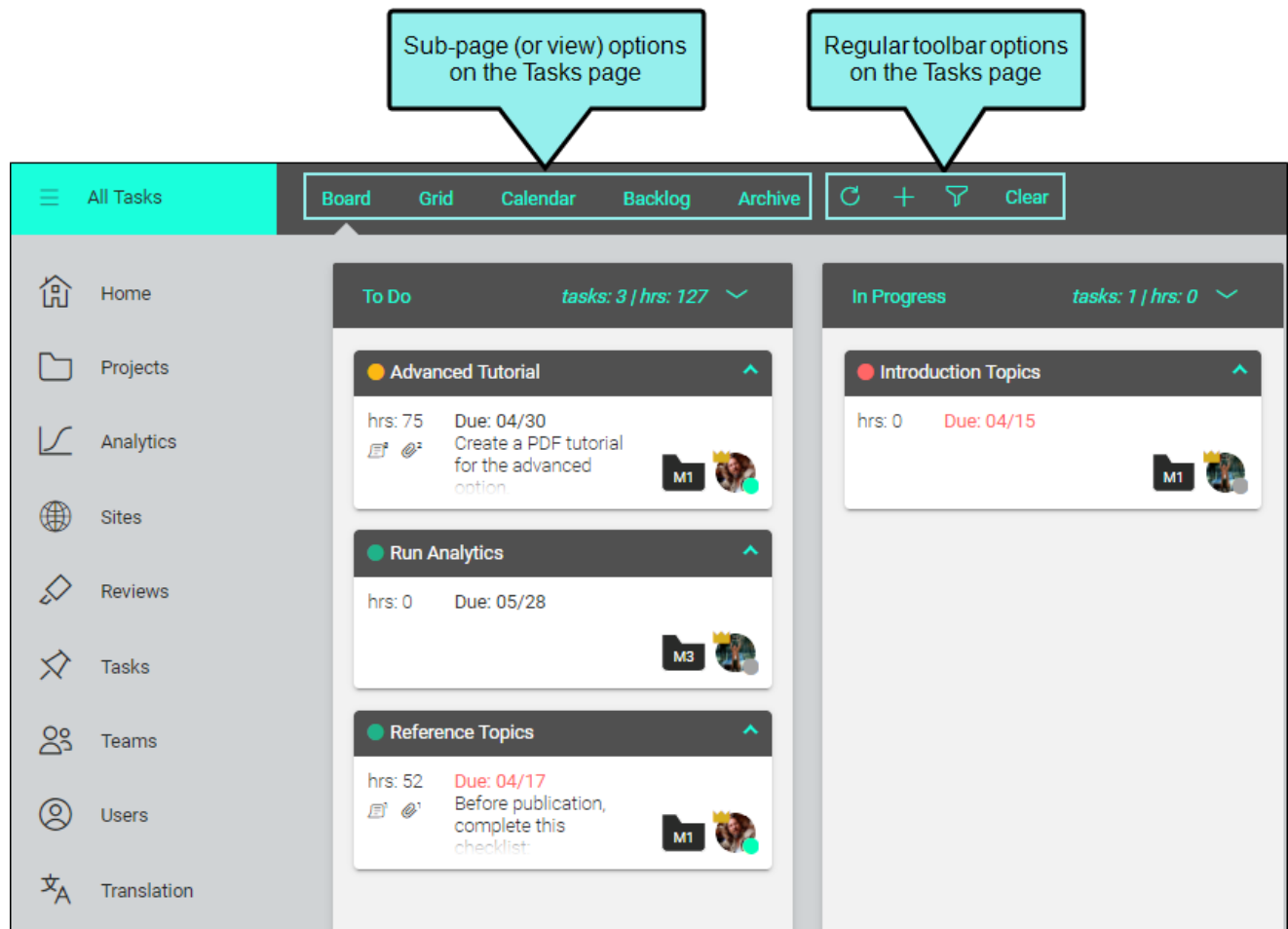

> 📝 **NOTE** If you are a subject matter expert (SME), rather than a Flare author, you will only see the Reviews page.
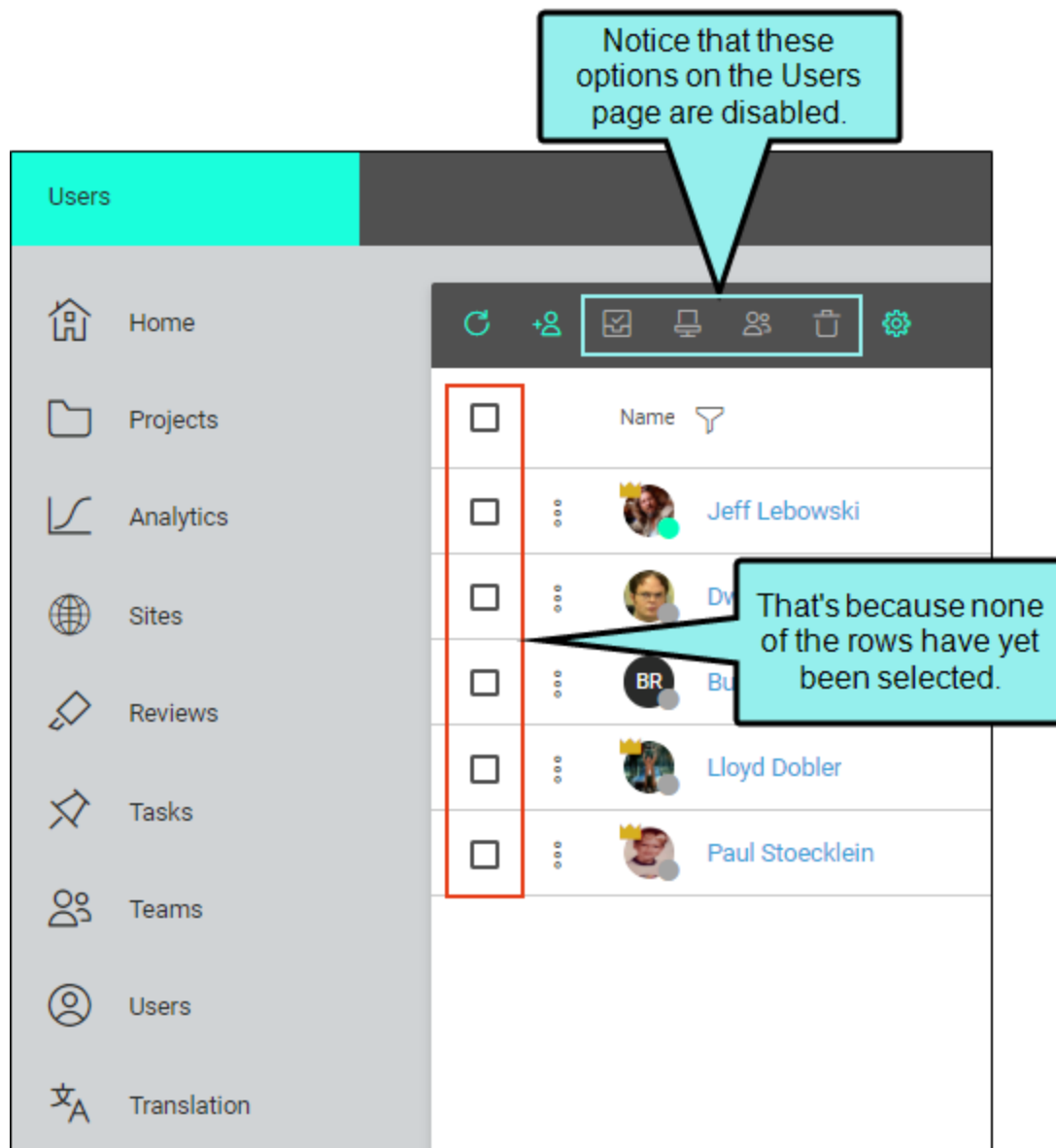
Your Home dashboard is initially empty, but you can add widgets to it by clicking at the top. Widgets provide a quick glance of various types of information throughout your system. See "Widgets" on page 65.

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).

Regular toolbar options on the Teams page

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

🅰 Translation

To Do — *tasks: 3 | hrs: 127* ∨

● Advanced Tutorial ^
hrs: 75   Due: 04/30
📄 📎² Create a PDF tutorial for the advanced option
M1

● Run Analytics ^
hrs: 0   Due: 05/28
M3

● Reference Topics ^
hrs: 52   Due: 04/17
📄 📎¹ Before publication, complete this checklist
M1

In Progress — *tasks: 1 | hrs: 0* ∨

● Introduction Topics ^
hrs: 0   Due: 04/15
M1

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.

On a small screen notice that the Tasks page is still able to show the entire calendar.

Click here to see the main page icons in a flyout menu.

Scroll bars are available when necessary to see information that is out of view.

Task cards for the selected day are listed on the left.

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.

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.
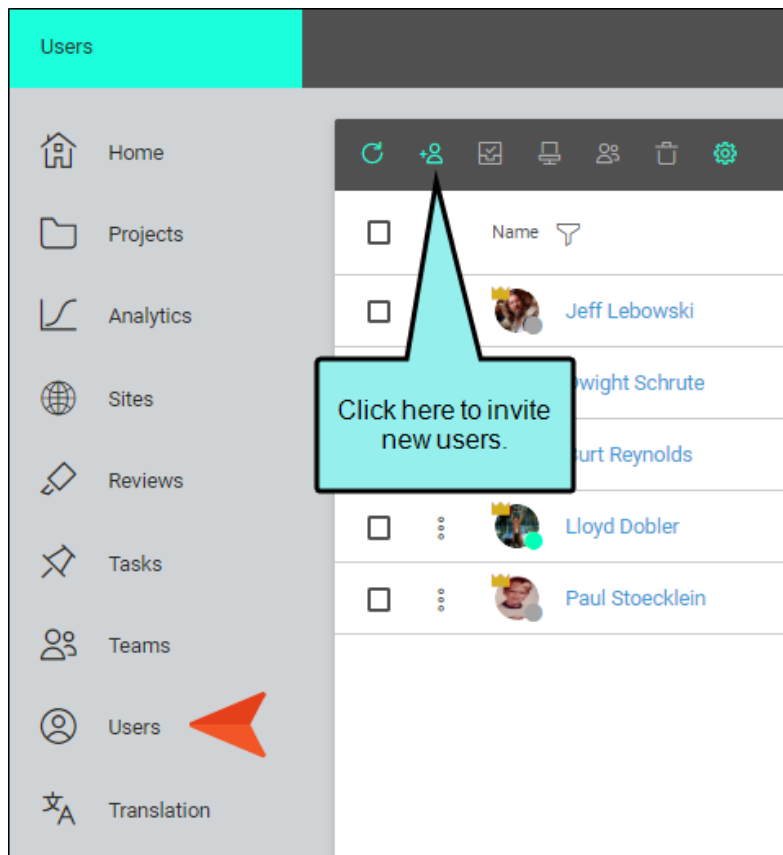
You can add multiple kinds of users.

- **Author** An author is an individual who works in Flare 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 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.

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	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.

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.
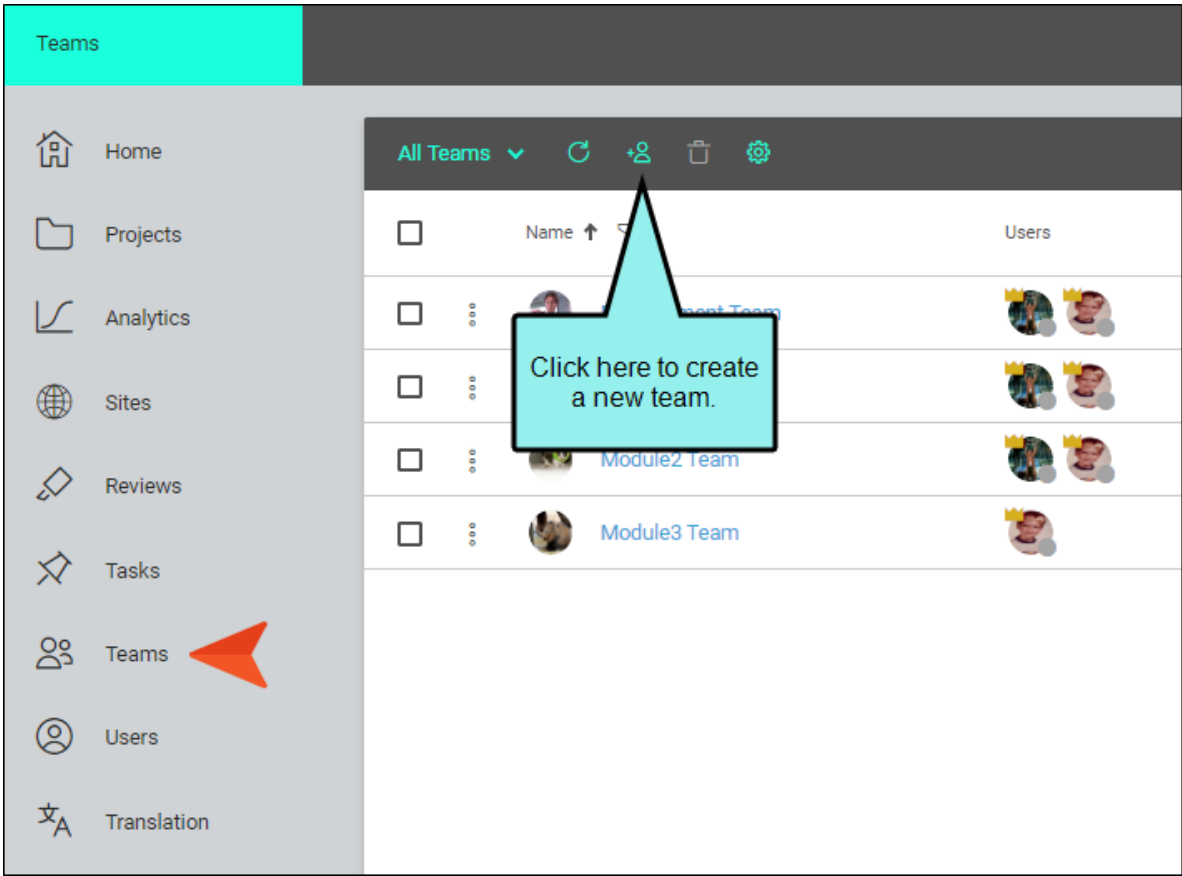
Not only can you associate specific users with a team, but you can also link teams to uploaded Flare projects and sites. You can also set permissions for authors who you've added to the team.
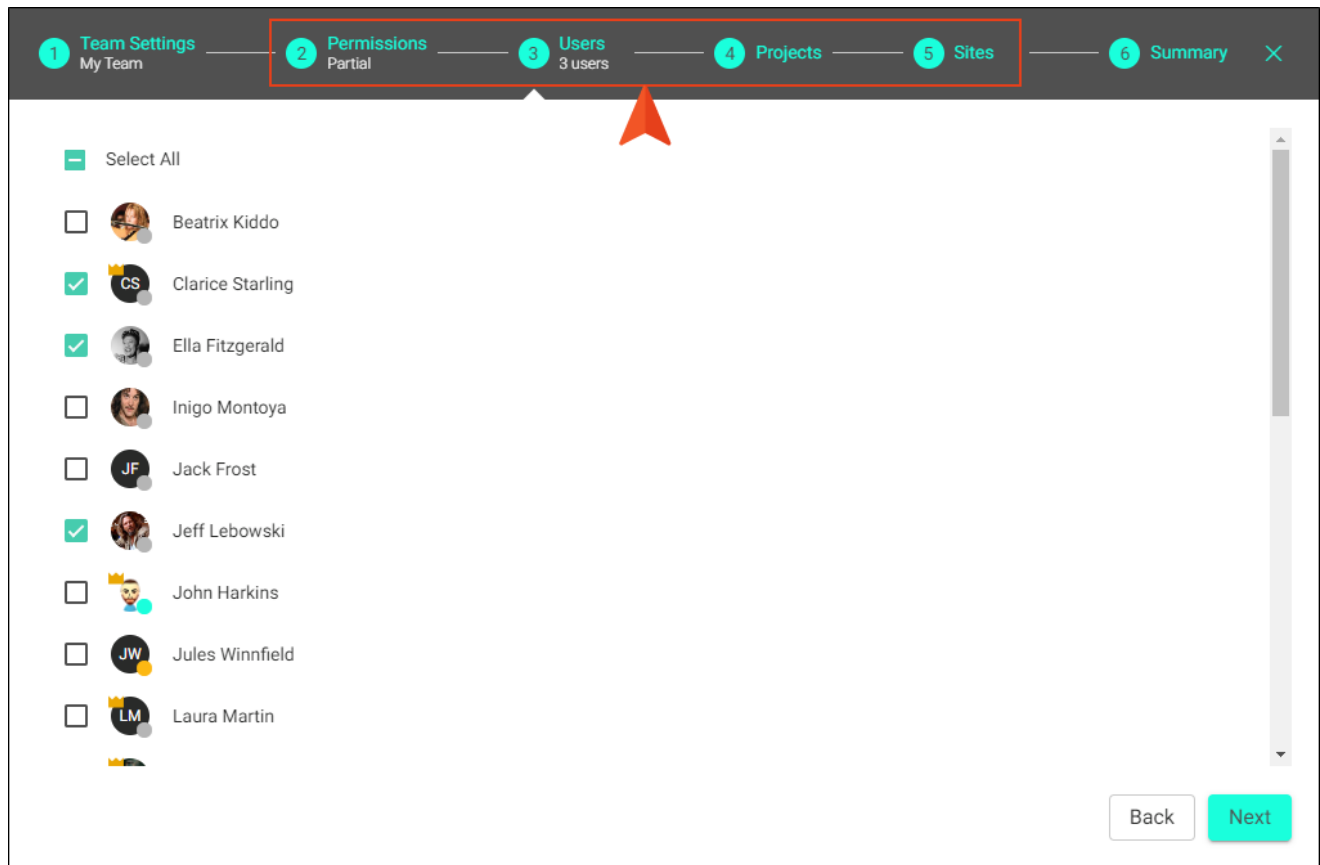
After teams are created, you can see the users and projects associated with each one.

CHAPTER 5

Projects and Builds

The Projects page displays a grid, which lists all MadCap Flare projects that have been uploaded to your Central license. These are copies of the local projects located on users' desktops. There are many good reasons to upload (i.e., bind) Flare projects to Central, including (but not limited to) 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 Flare project files and the cloned files on Central can be used as a source control solution, with branching integrated in various places in Central; (3) you can use Central as a platform for topic reviews; (4) you can add and edit project files directly in Central, with the ability to tap into the power of ChatGPT; and (5) you can manage progress on topic development by using checklists.

This chapter discusses the following:

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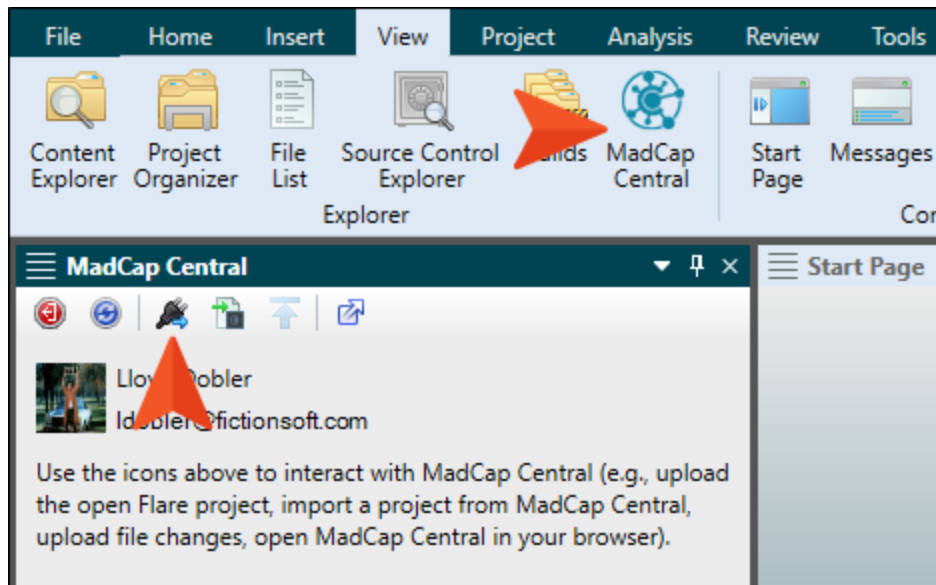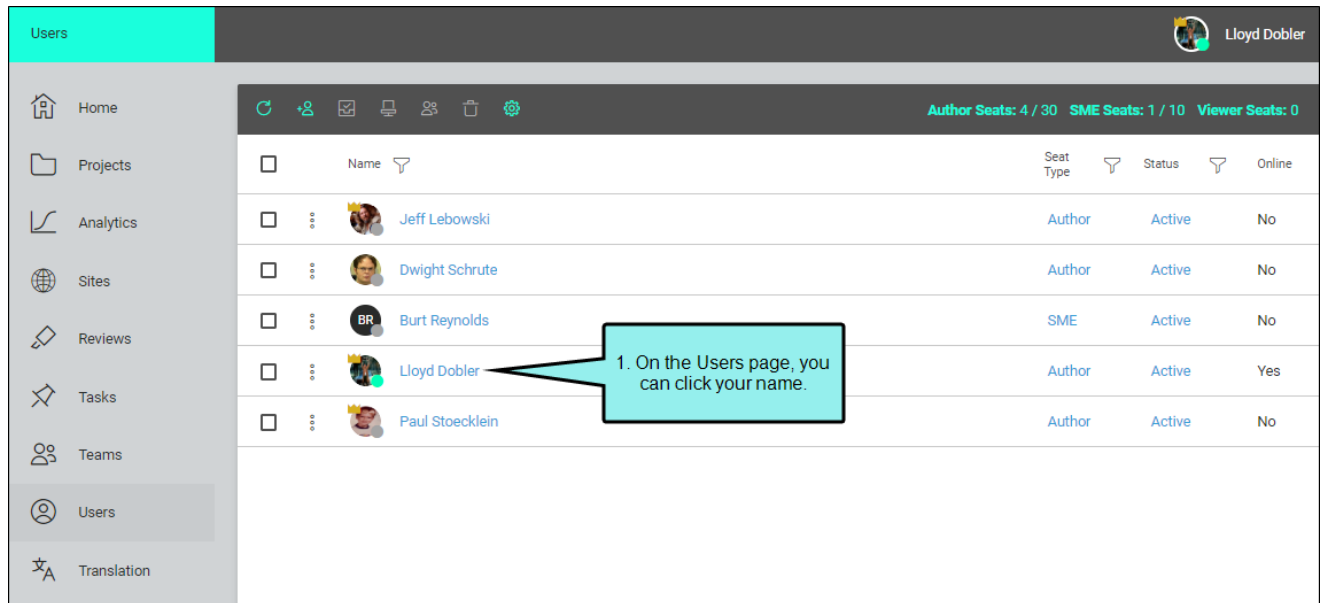
> ⚠ **IMPORTANT** Central is not a replacement for your desktop Flare application. You continue to author your project content locally in Flare. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project on Central. If you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

Access   ✕

Lloyd Dobler
ldobler@ahern.madcapsoftware.
com
R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654

⚙ Settings

🔒 Password

→ **Access**

✰ Assign New Task

🕐 Activity

☰ Permissions

🔔 Notifications

✕ Deactivate

🗑 Delete

> Teams (5)

> Projects (11)

3. Click **Edit**.

Edit

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.

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 65.

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 41).

▌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. 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.
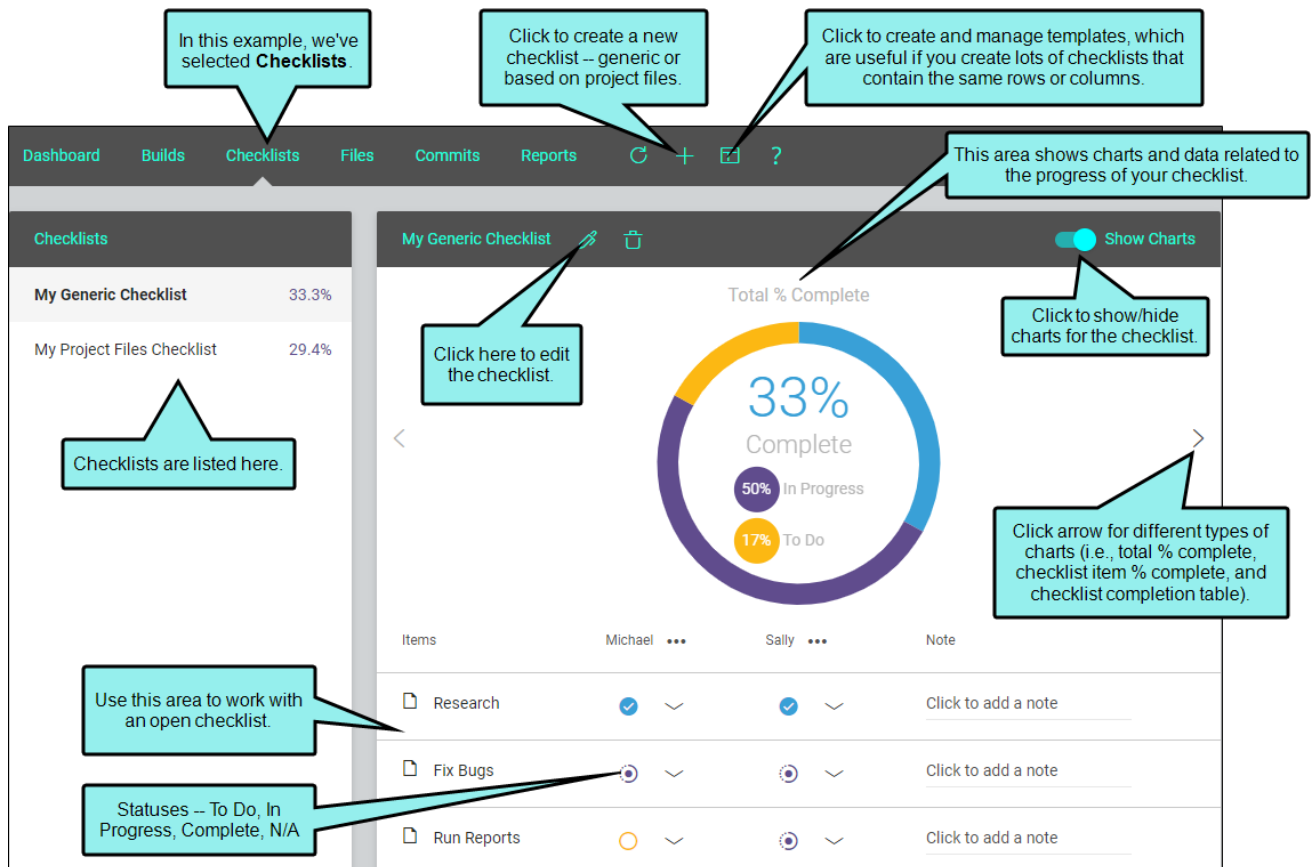
| Files

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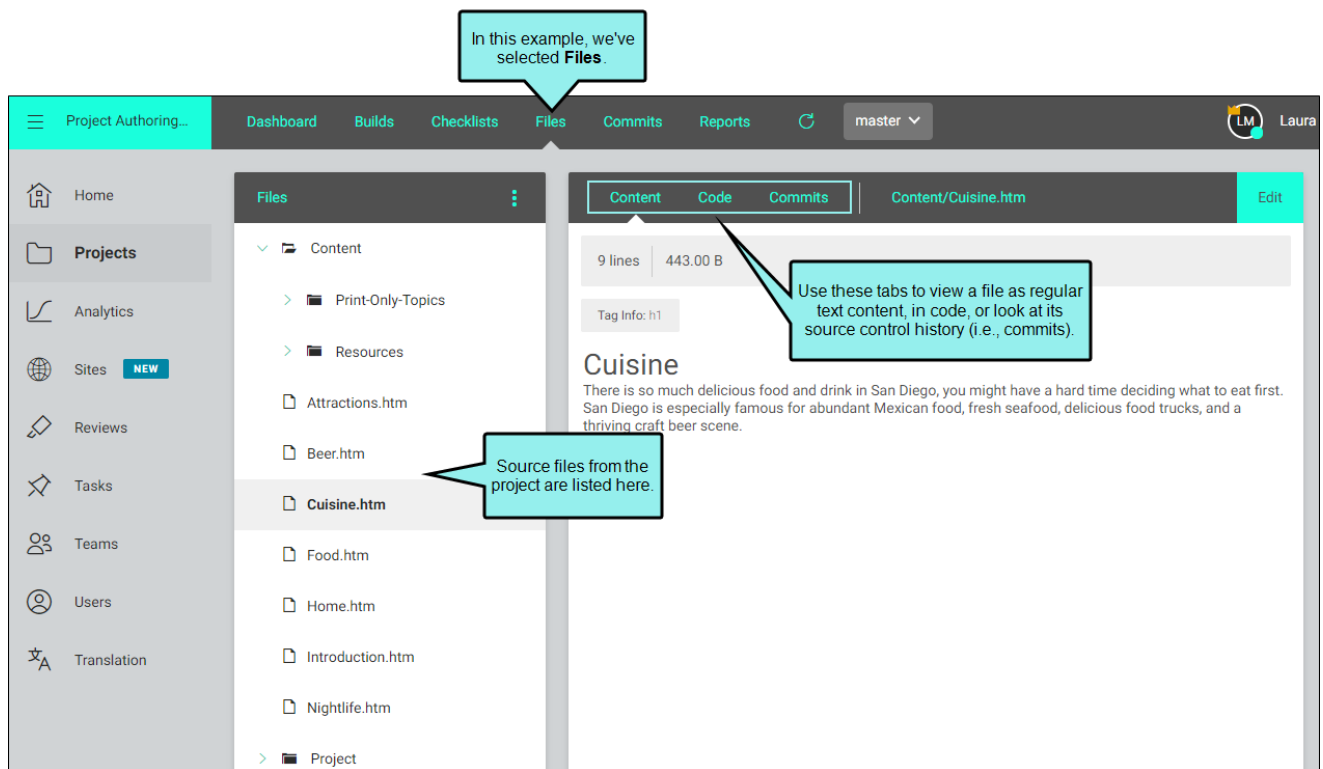
Commits

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.
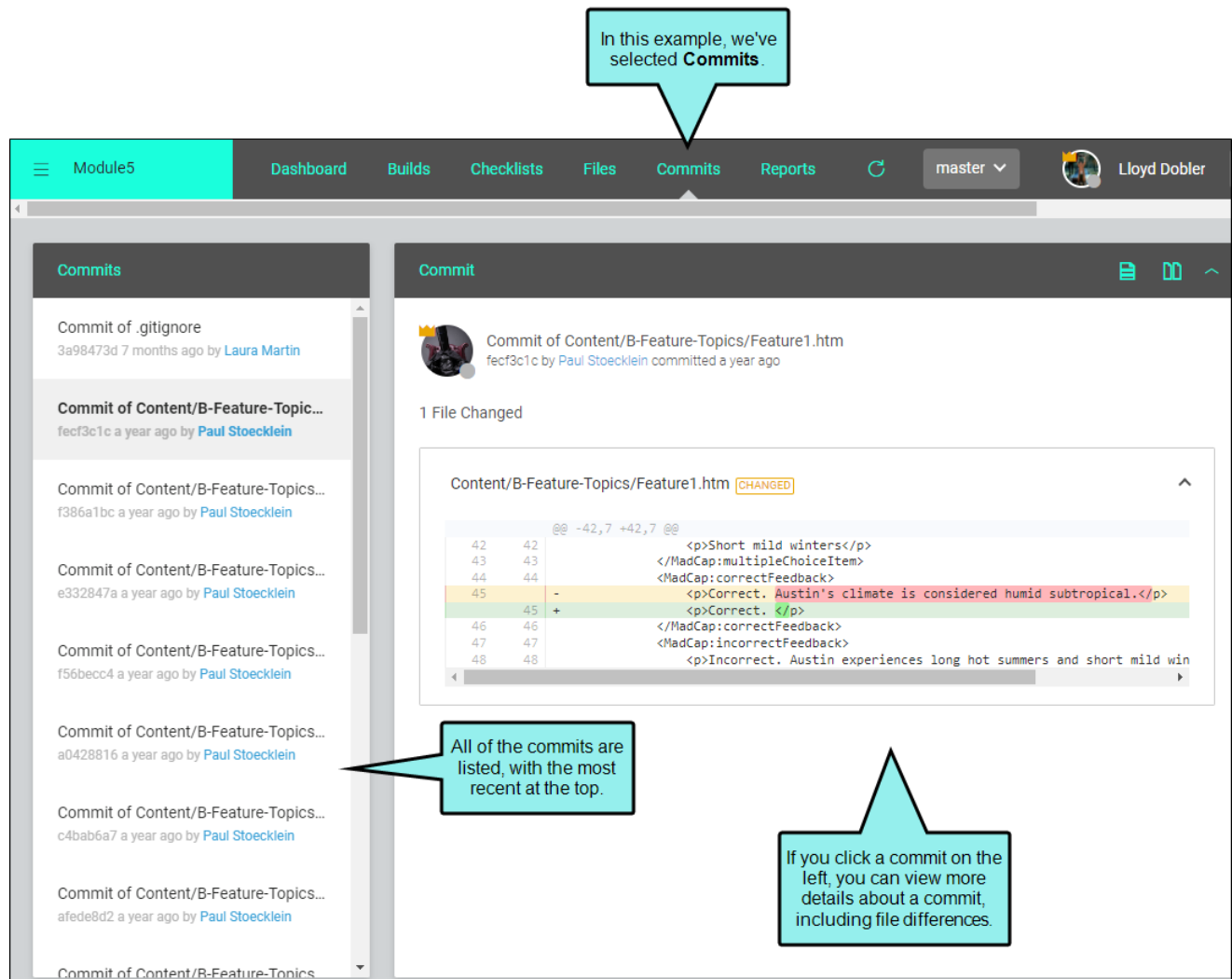
Reports

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.
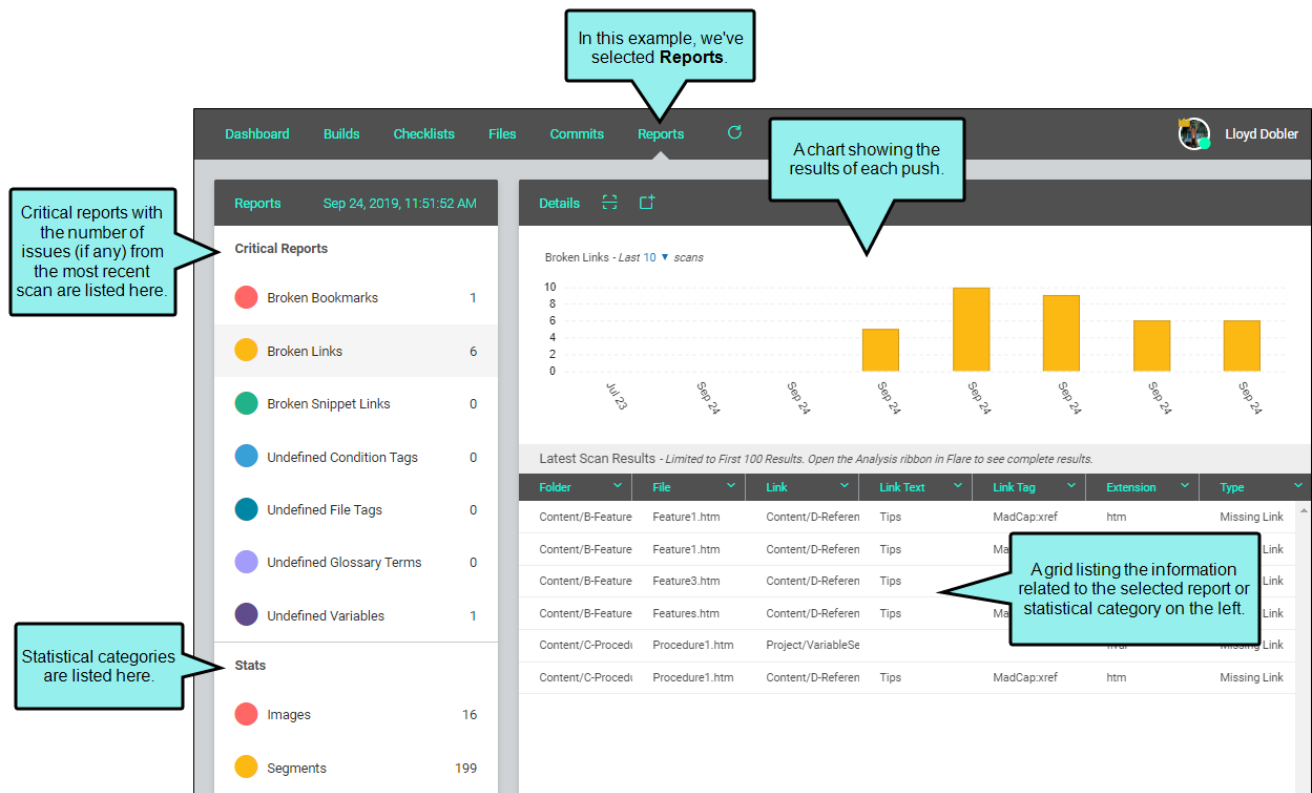
Accessing Other Projects

Once you've opened a project in Central, you can access a drop-down in the upper-left corner of the interface.
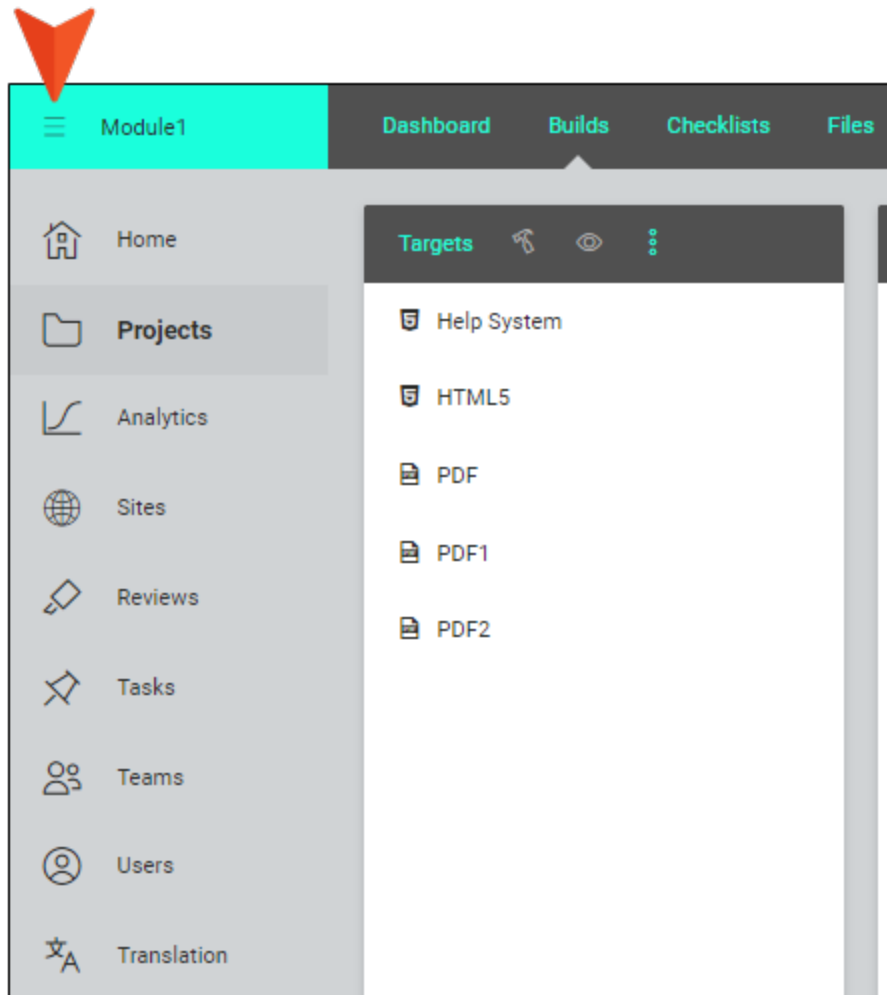
From this drop-down, you can quickly navigate to any other projects that you have permission to open. This is quicker than going back to the main Projects page grid to open another project.
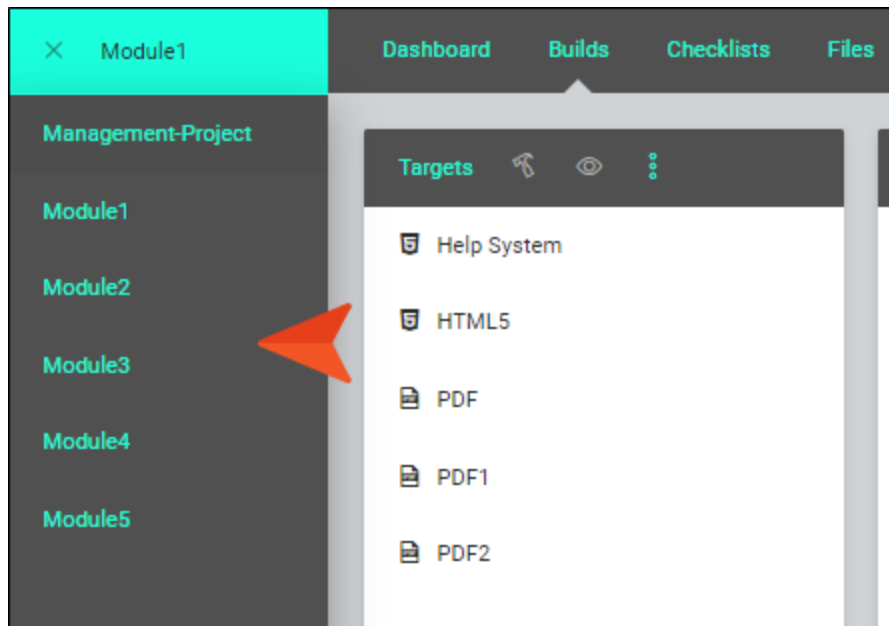
Sites

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.

Analytics

The Analytics page lets you view user activity on published Flare 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).
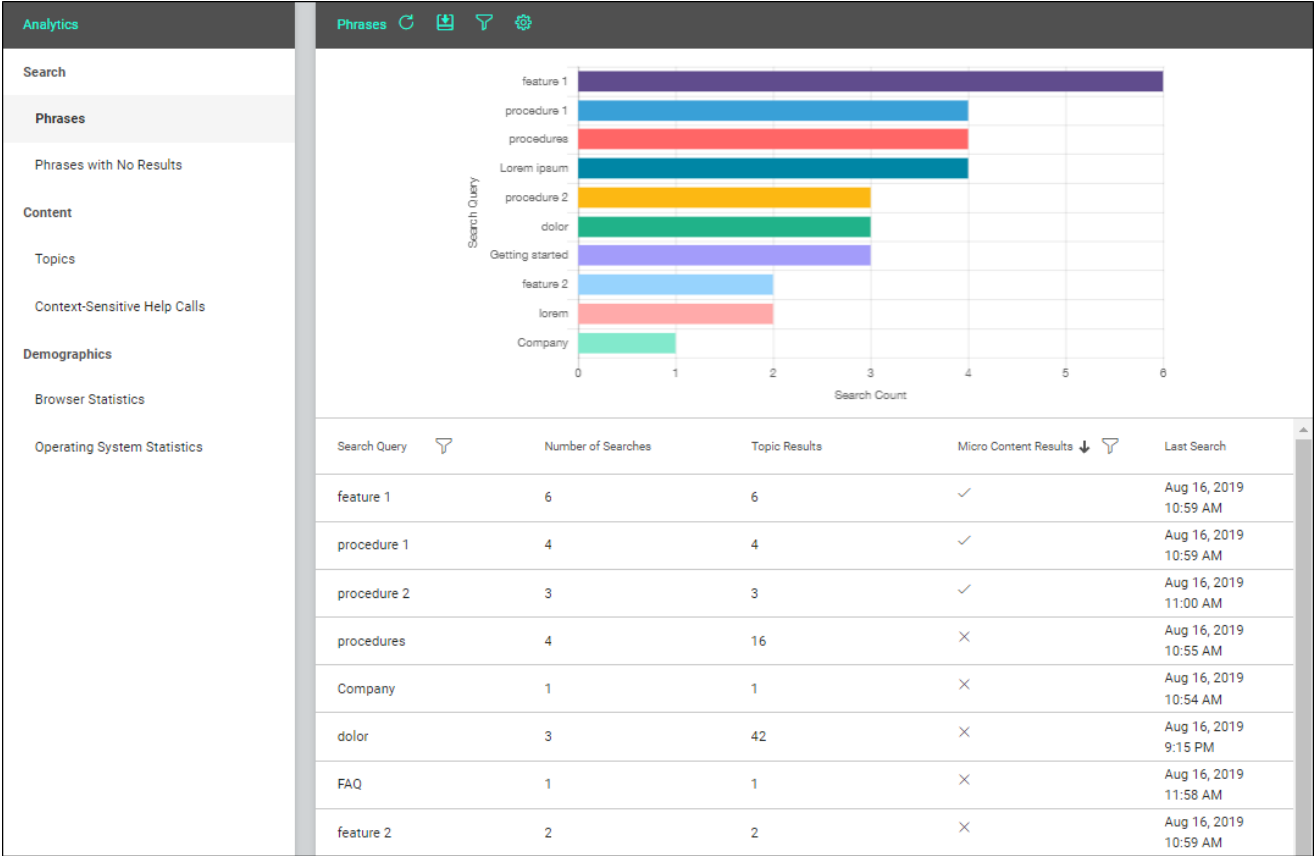
Central analytics works on Flare projects uploaded to Central, or you can host output on your own servers. If you host the output outside of Central, you still need to use Central with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Central (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
Accept File
The Review Package
is Closed When All
File(s) are Accepted

OWNER
Accept/Reject
Changes

OWNER
Close
Review File

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.

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.

		Name	Description	All Tasks	My Tasks	Storage
☐	⋮ MY	My Cool Task Board	Tasks for all my cool things I'm working on	0 (0)	0 (0)	0.00 B
☐	⋮ WID	Widgets Board	Tasks that have to do with widgets	0 (0)	0 (0)	0.00 B
☐	⋮ ELE	eLearning Board	Tasks related to eLearning	2 (0)	0 (0)	0.00 B
☐	⋮ DEF	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.
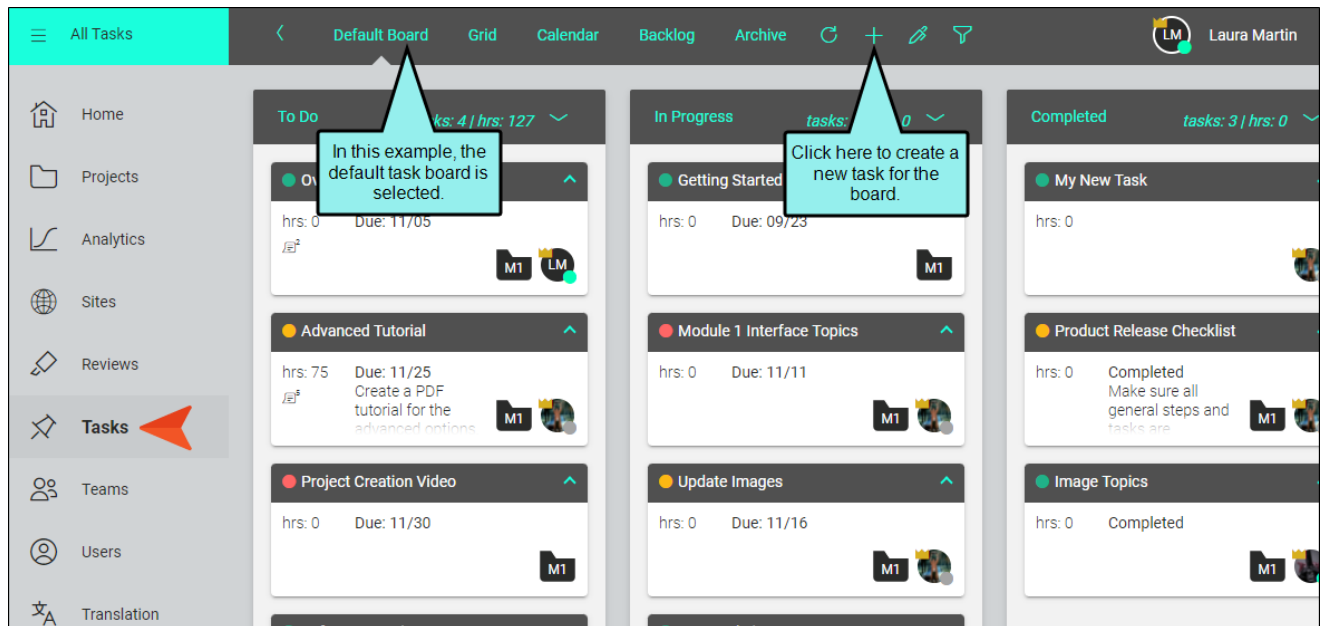
Tabs at the top of the page let you see tasks in multiple views.
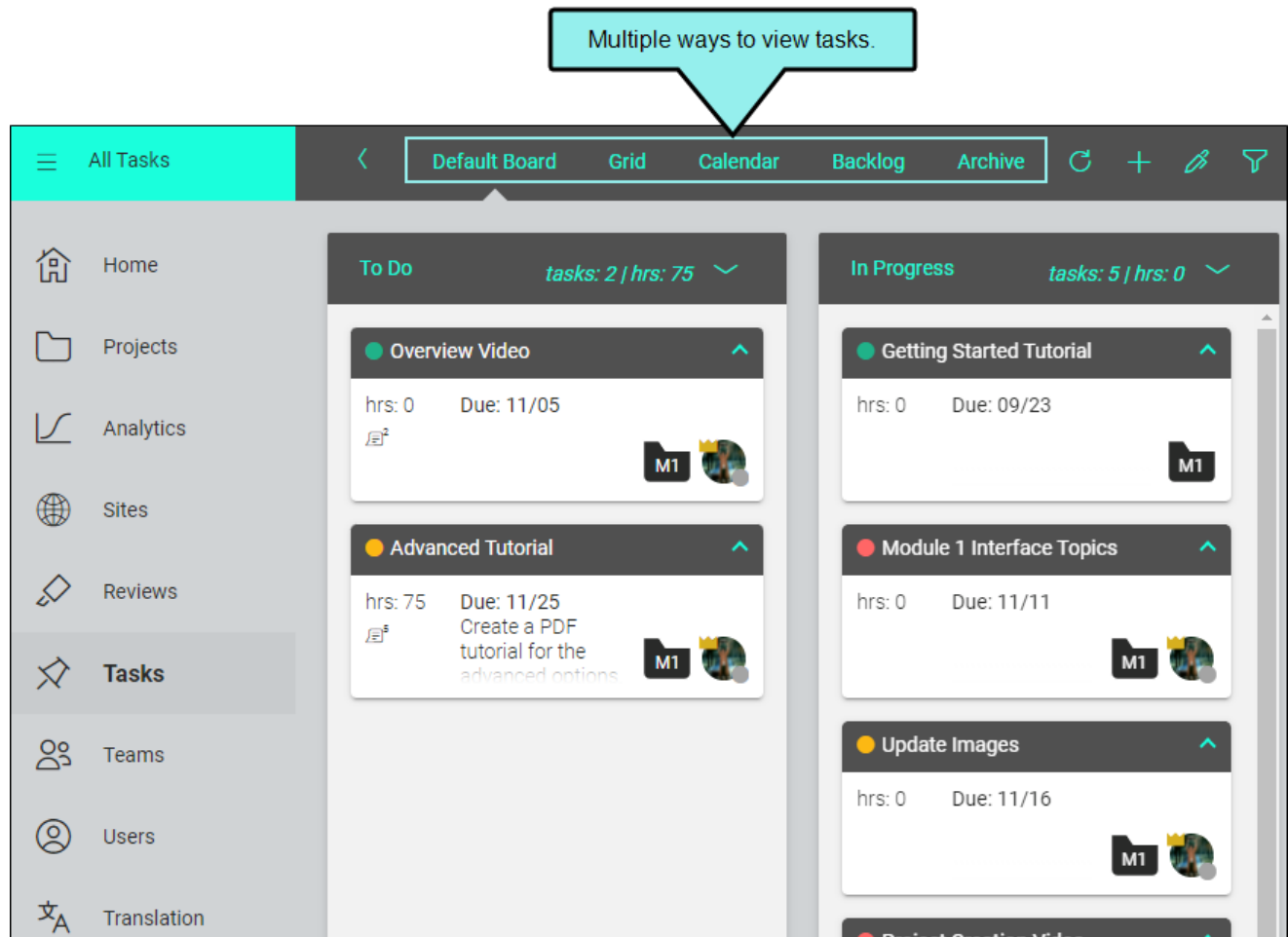
This chapter discusses the following:

❙ 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.

In this example, Default Board is selected.

The main area shows task cards in different states (To Do, In Progress, Completed), similar to a Kanban.
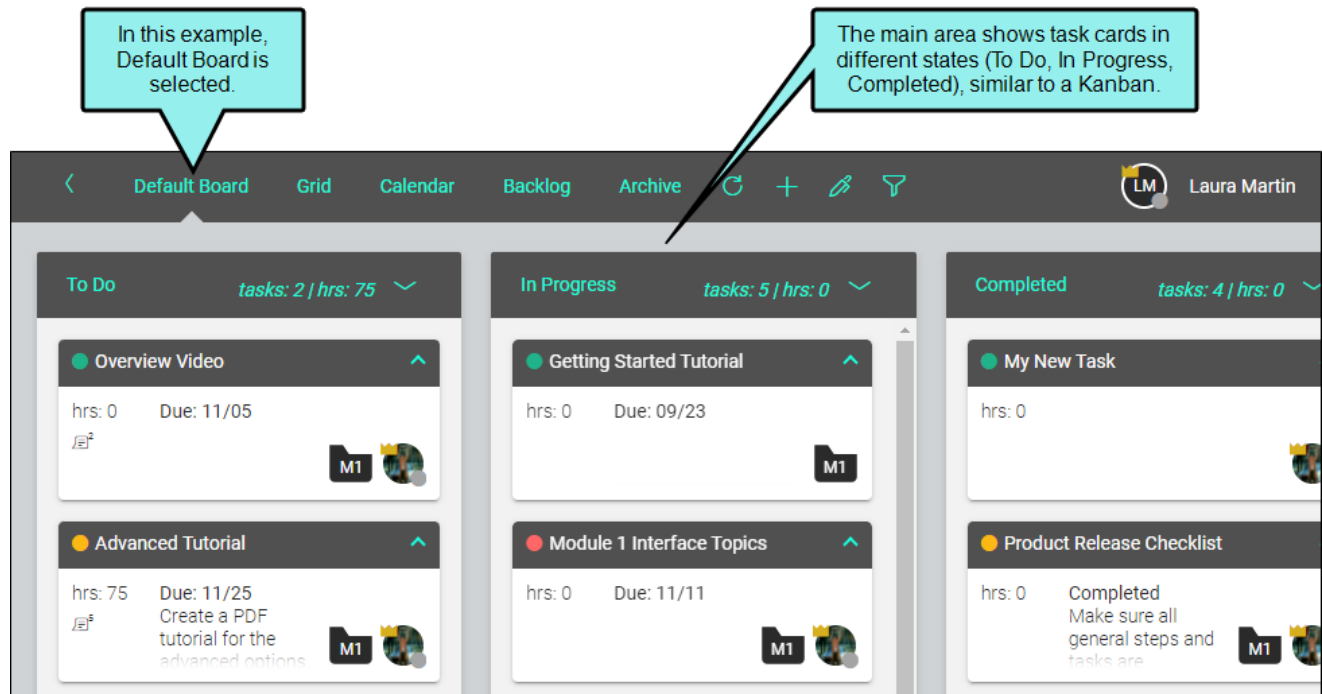
You can collapse and expand any or all cards. This lets you view more task cards on the screen.

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

To Do	tasks: 4	hrs: 0	In Progress	tasks: 2	hrs: 0	Completed	tasks: 2	hrs: 0

To Do

● 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

● Reference Topics
hrs: 0   Due: 10/22
BR

● Beginner Kick Boxing Video
hrs: 0   Due: 11/18
M3

Completed

● 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 ⌄

To Do — tasks: 4 | hrs: 0 ⌃

● Update Images ⌄

● Getting Started Video ⌄

● Finish Index ⌄

● Module 1 Interface Topics ⌄

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

All tasks in To Do are collapsed.

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

Completed — tasks: 2 | hrs: 0 ⌄

● Overview Guide for V3 ⌃
hrs: 0   Completed

● Getting Started Tutorial ⌃
hrs: 0   Completed
M2

You can also click the arrow on individual task cards to collapse or expand just those cards.

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

● Getting Started Video ∨

● Finish Index ∨

● Module 1 Interface Topics ∧

hrs: 0   Due: 10/16

M1

● Reference Topics ∧

hrs: 0   Due: 10/22

BR

● Beginner Ki ∧

Just these two task cards are collapsed.

● Overview Guide for V3 ∧

hrs: 0   Completed

● Getting Started Tutorial ∧

hrs: 0   Completed

M2

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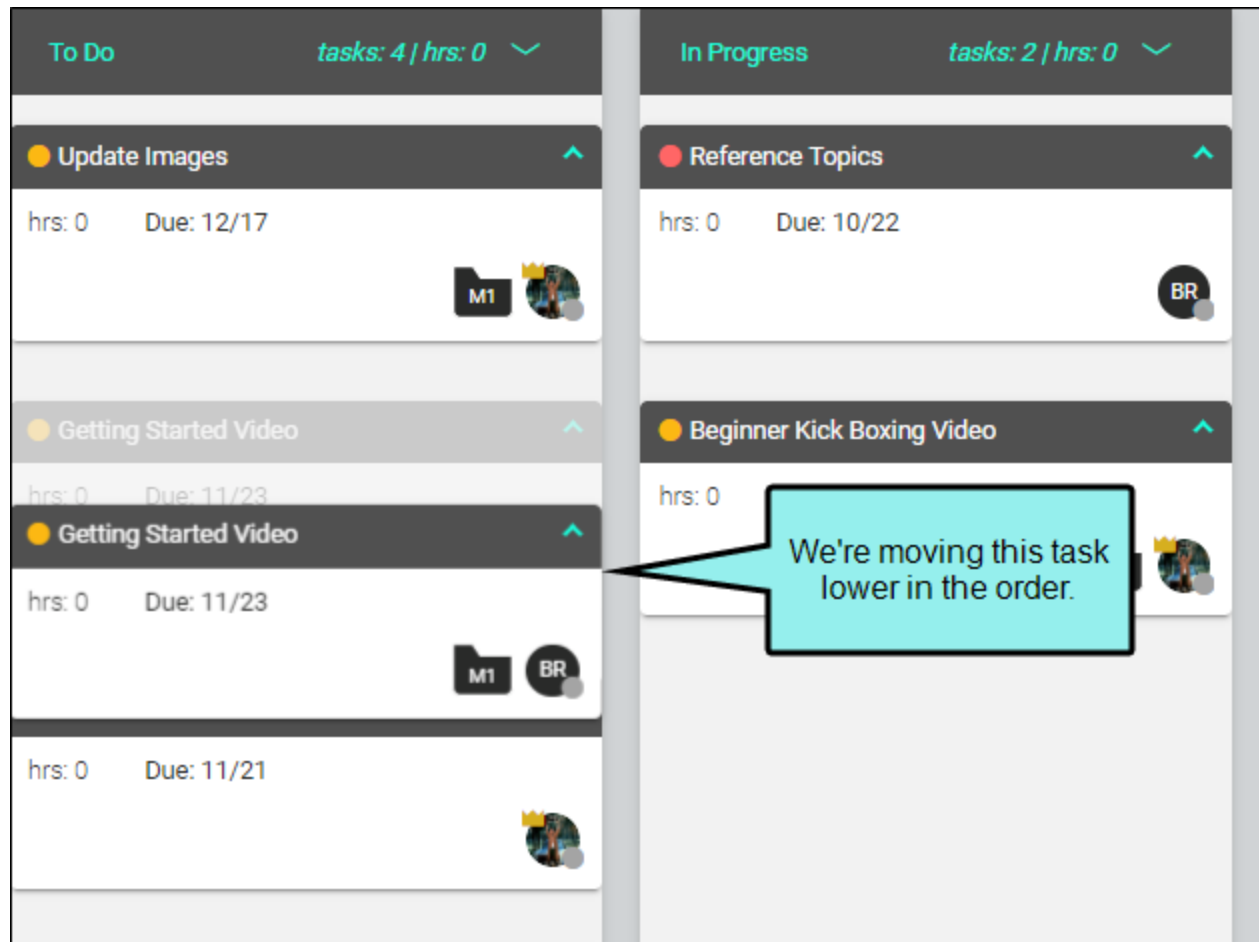
▌Grid

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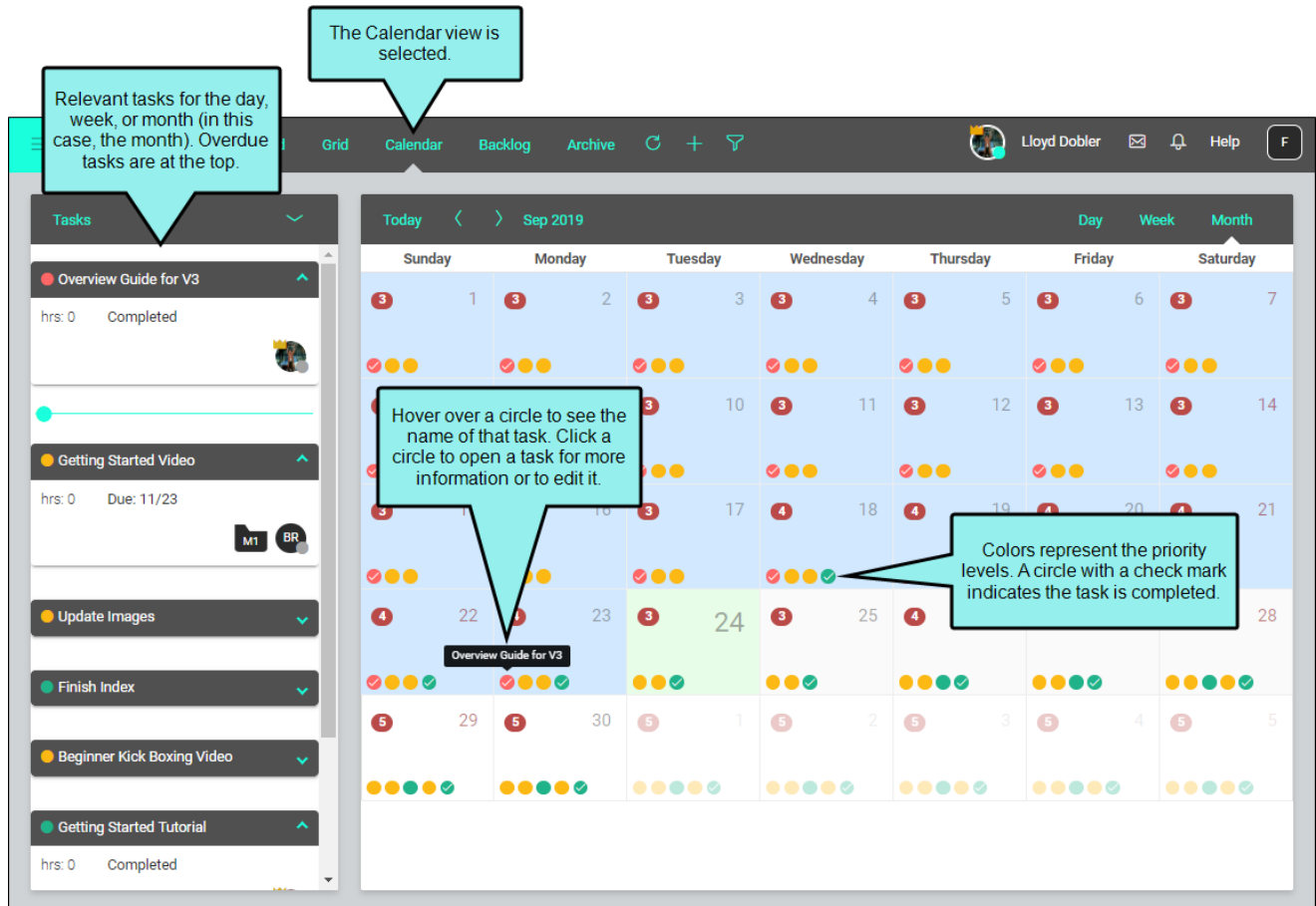
Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and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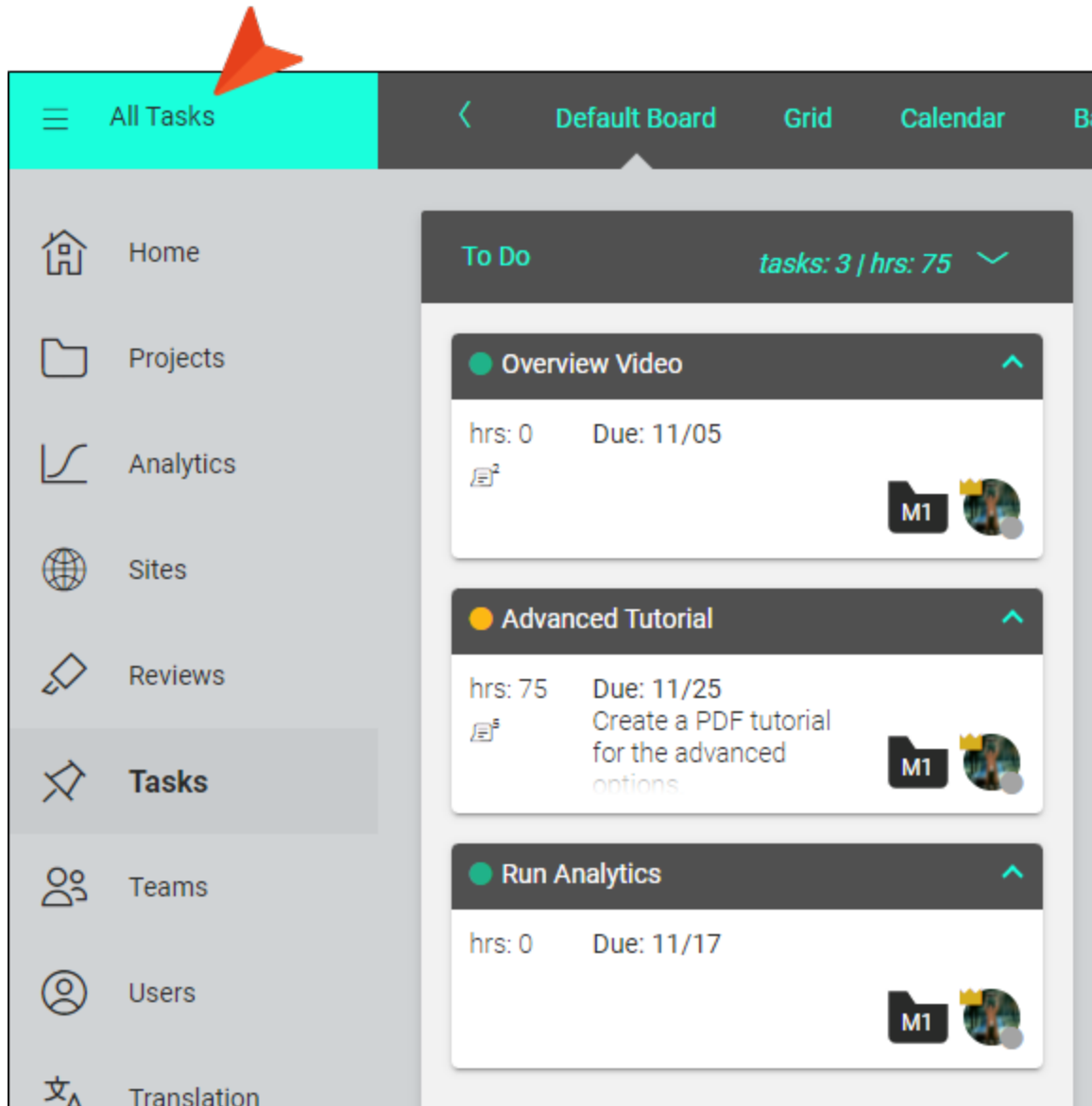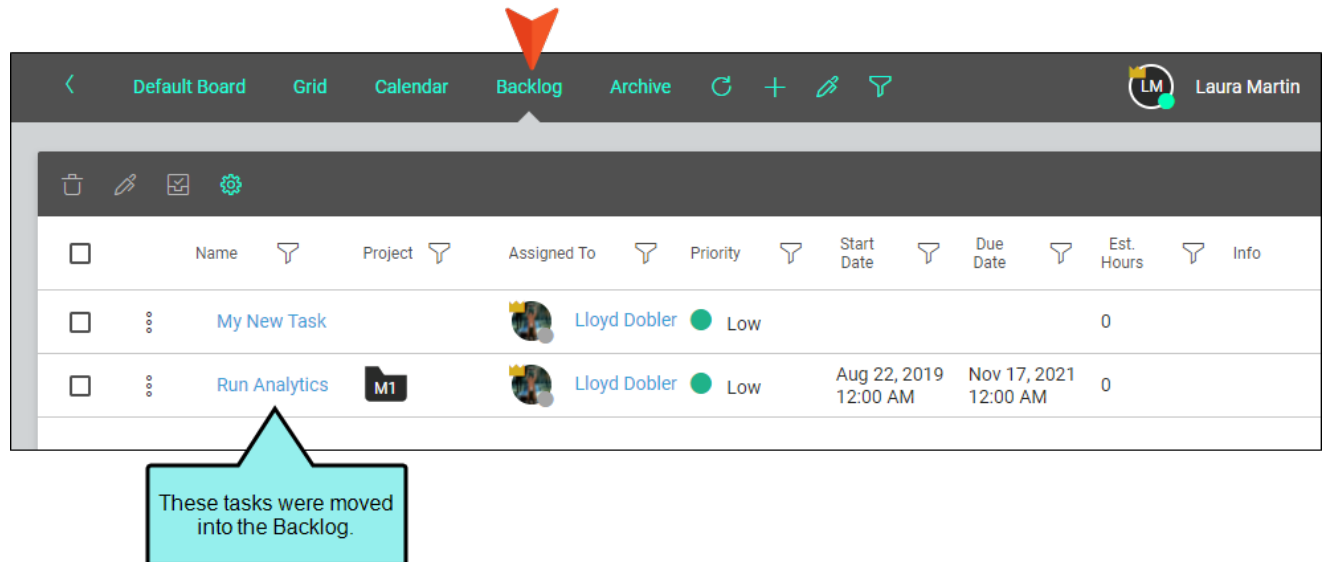
Then, in the flyout menu, you can select **My Tasks**.
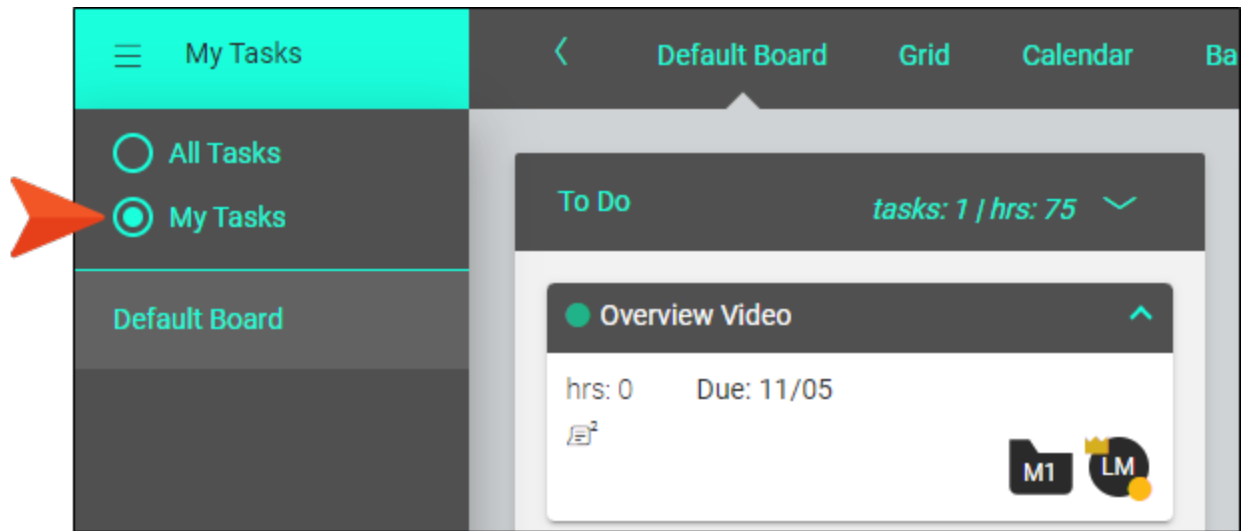
Backlog

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.

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.

These tasks were moved into the Archive.

Translation

The Translation option lets you request a quote for translating your Flare projects and other files. This quote originates from MadTranslations, which is the translation services division of MadCap Software. Select **Translation** on the left side of Central, choose your Flare projects and targets, complete the fields on the right side, and click **Submit**. Within two business days you will receive a reply from MadTranslations.
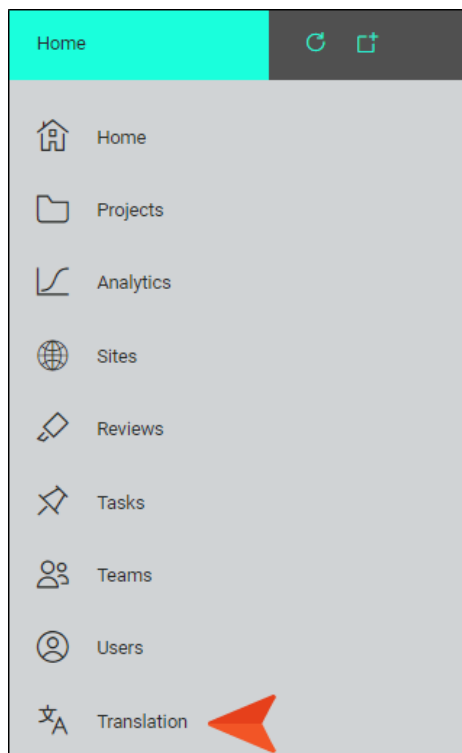
Select the projects and targets needing translation.

Then complete the fields on the right side.

madtranslations - Quote Request ✕

Selection
Please select the projects and targets (optional) for which you would like to receive a translation quote.

☑ Module1 ⌄

  ☑ HTML5

  ☑ PDF1

  ☑ PDF2

☐ Module2 ›

▬ Module3 ⌄

  ☐ HTML5

  ☑ PDF

Translation details
If you want to submit additional files not currently in MadCap Central, please attach them separately in a zip file. If you have projects or files with different source languages, please complete a separate translation quote request for each source language.

Source language
English (United States) ▾

Target language(s)*
Chinese (China) ✕   French ✕   Italian ✕

Due date
11/21/2019 🗓

Description
We need translations in these languages in separate Flare projects.

Additional Files (.zip)

Terms and Privacy
Your data privacy and security are important to us. We will never share your information with a third party. We will store the information you provide to us, and will only use this information for the purpose of assisting you with your inquiry. By checking this box you agree to these terms, and you give permission for MadTranslations (a division of MadCap Software, Inc.) to receive a copy of all files selected in order to provide you with a free translation quote.

☑ I agree to the Terms of Use Agreement and Privacy Policy.

Once your request has been received, a confirmation email will be sent to the email address associated with this MadCap Central account.

Cancel   Submit

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.
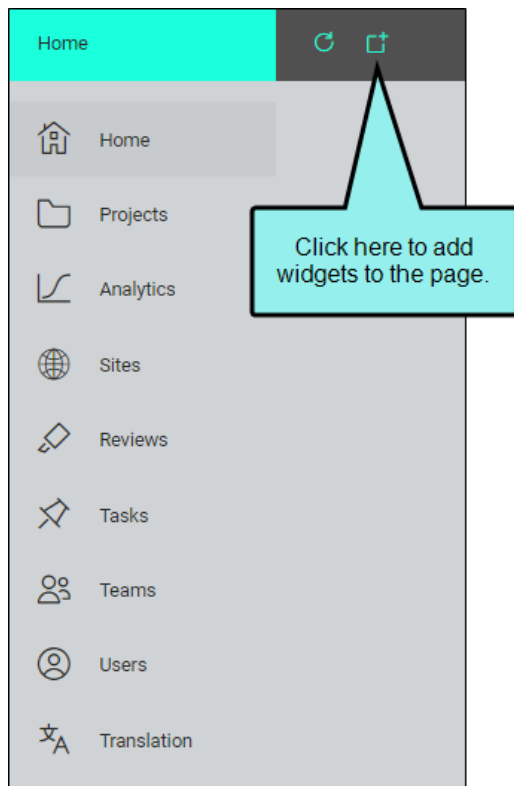
Add Widgets

- ✅ 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.
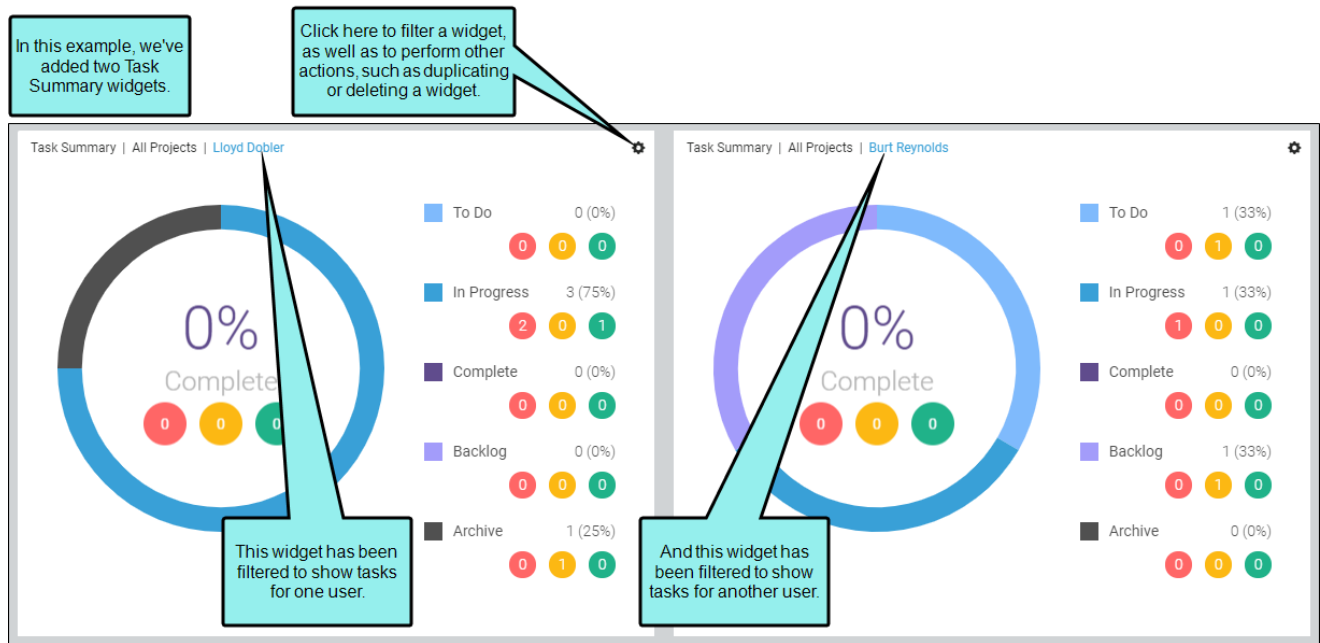
APPENDIX

PDFs

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

Getting Started Guide

Authoring Guide

License Management and Purchasing Guide

Projects and Builds Guide

Security Whitepaper

Sites Guide

Tasks Guide

Users and Teams Guide

What's New Guide

Widgets Guide