

MADCAP CENTRAL

Sites Guide

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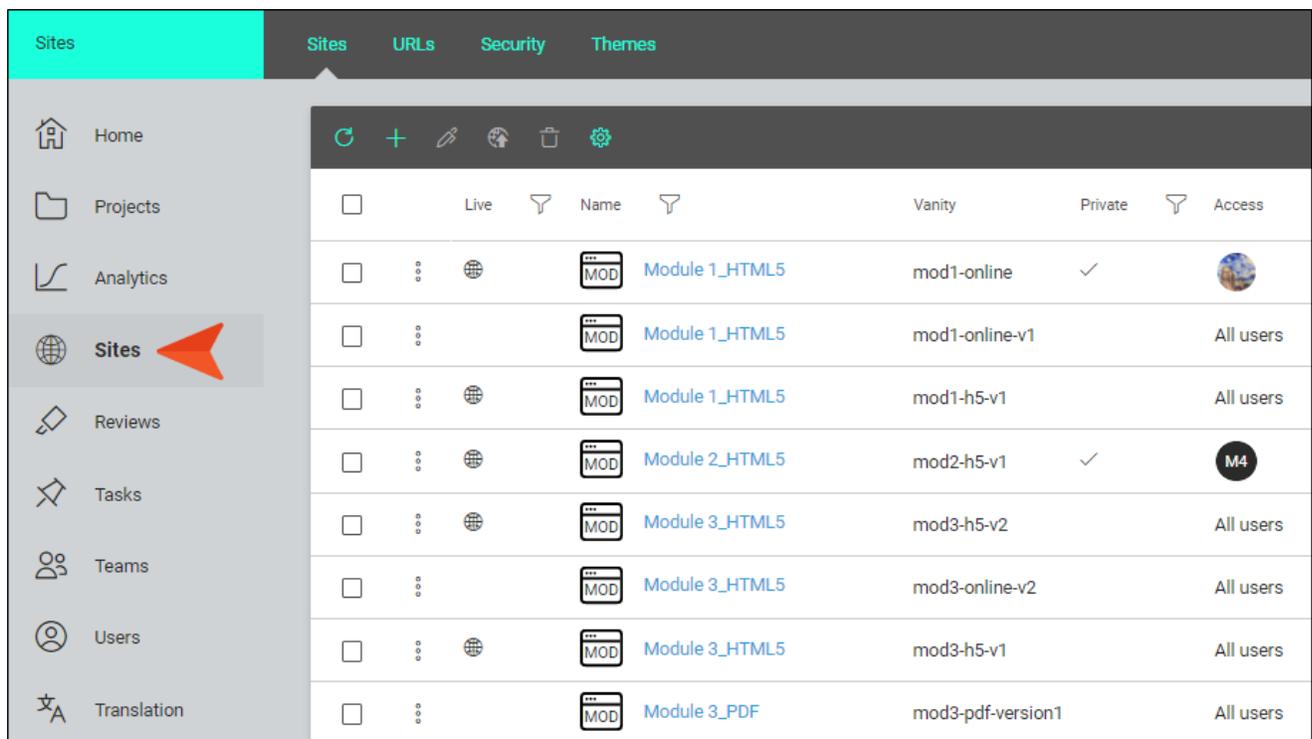
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CHAPTER 1

Introduction

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.



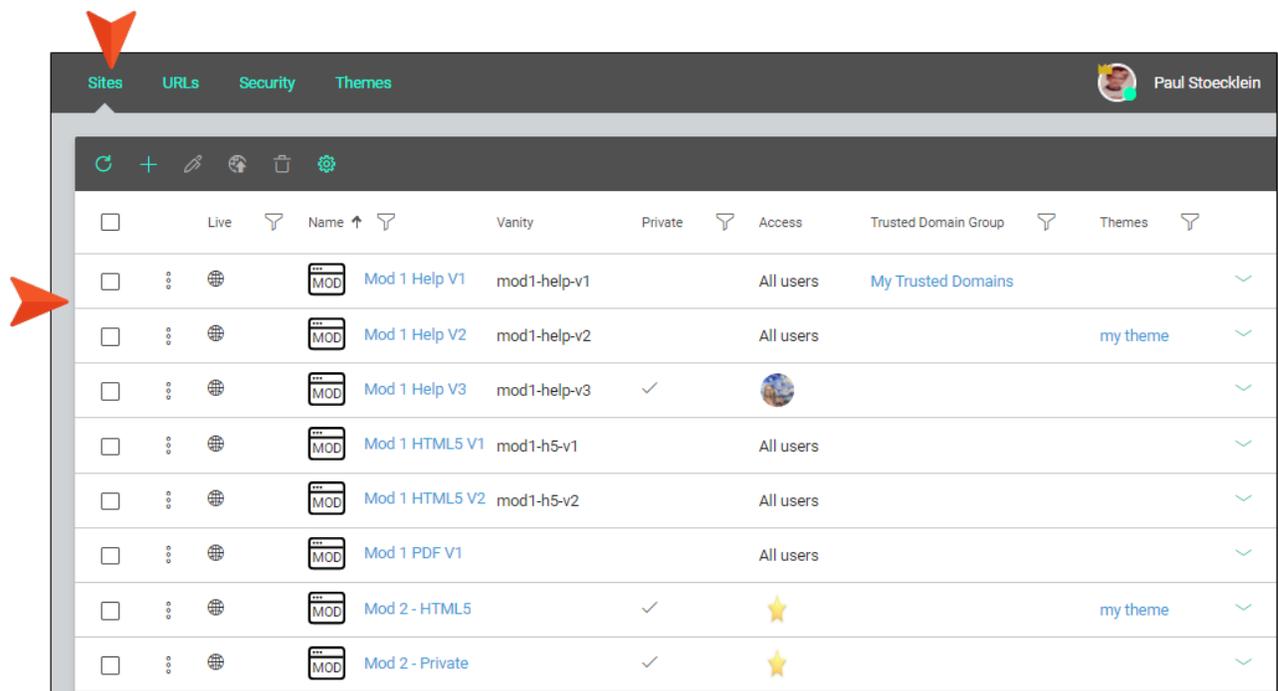
The screenshot displays the 'Sites' management interface. On the left is a navigation sidebar with options: Home, Projects, Analytics, Sites (highlighted with a red arrow), Reviews, Tasks, Teams, Users, and Translation. The main content area shows a table of sites with columns for checkboxes, Live status, Name, Vanity, Private, and Access. The table contains 10 rows of site configurations.

<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
<input type="checkbox"/>		Module 3_PDF	mod3-pdf-version1		All users

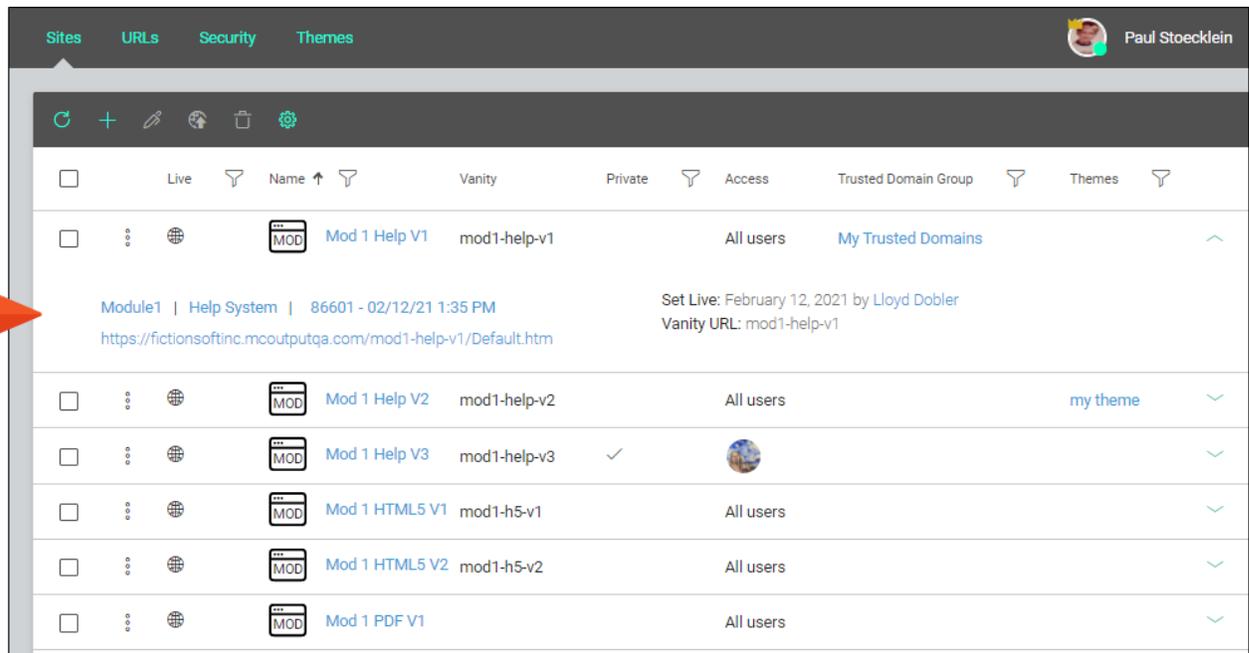
CHAPTER 2

Sites Page View

The Sites page view lets you create, manage, and see all of the sites for the license. This includes the ability to set the vanity (URL) for the site's output, as well as set the output as "live" and/or "private."



You can expand any row to see output information and the link associated with a specific site.



This chapter discusses the following:

Main Activities for Sites	8
Other Activities for Sites	44

I Main Activities for Sites

Some activities are particularly common and important when it comes to this feature.

- "Creating Sites" on the next page
- "Editing Sites" on page 13
- "Setting Site Vanities" on page 14
- "Setting Sites as Live" on page 26
- "Rolling Back to a Previous Live Output" on page 32
- "Setting Sites as Private" on page 37
- "Associating Sites With Teams" on page 43

Creating Sites

You can create a site for each output that you want to set as "live" and/or "private."

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Create a Site

1. Do the following:
 - Make sure you are associated with the project for which you want to set up a site destination.
 - Make sure you have synchronized (pushed) the latest changes from Flare to Central, and if you are using branching, ensure the changes for that particular branch are synchronized with Central.
 - You also might want to make sure the relevant target has at least one build successfully generated for it. Otherwise, you can tell Central to just use the latest build when you get to that option later in the dialog.
2. On the left side of the interface, click **Sites**.
3. With the **Sites** tab selected at the top, click .
4. On the **Settings** tab of the dialog, complete the appropriate fields.
 - **Name** Give the site a name so that you easily recognize the output to which it points.

☆ **EXAMPLE** You might decide to name each site after a combination of the project and target names. If your project is called "Module 1" and the target is called "HTML5," you could name the site "Module 1 - HTML5."

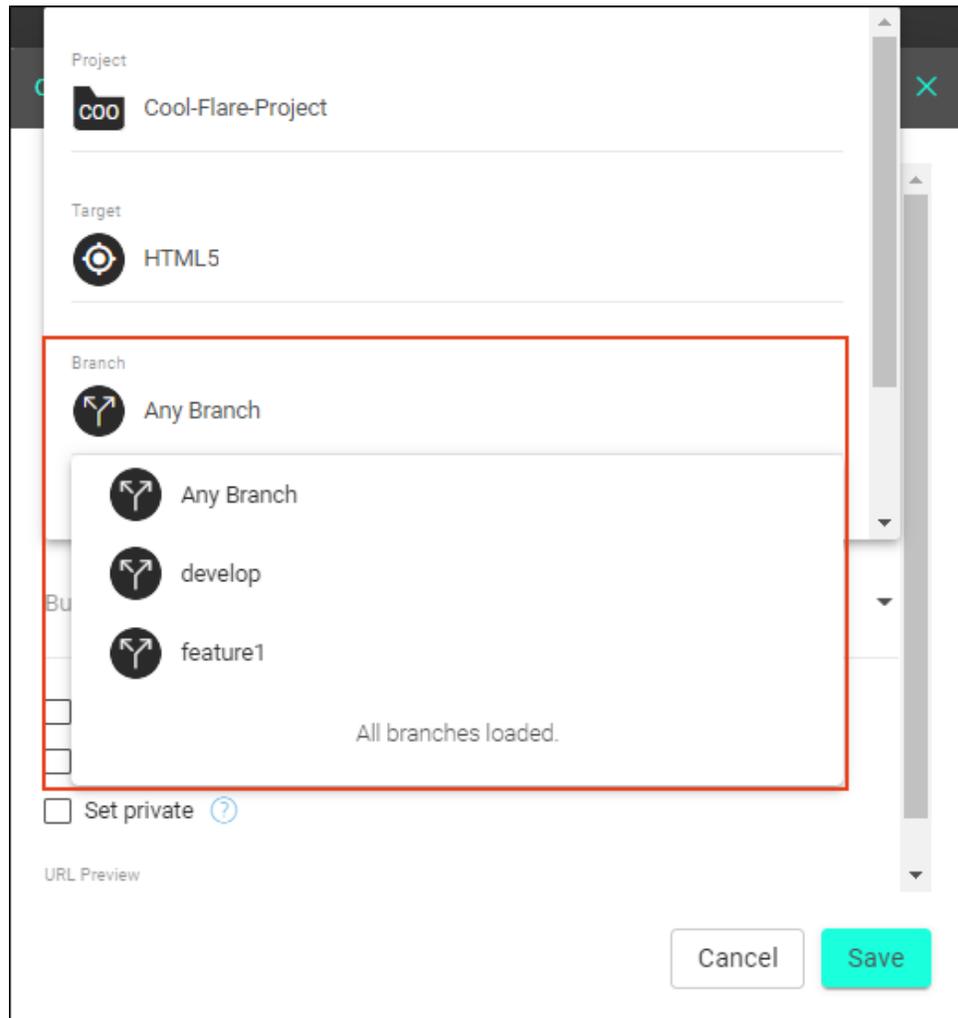
 **NOTE** Keep in mind that the avatar automatically generated for the site will display the first three characters of the site's name.

- **Domain** Select a domain (i.e., URL), which you create and manage in the URLs page view. If you are not mapping to your own host domain, just select the default Central domain (e.g., fictionsoft.mcoutput.com).
- **Vanity** (Optional) You can set a vanity for the output to produce a more meaningful URL that is easier to recognize when the site is live. This is also useful if you have multiple versions of a target's output and want to have a different URL for each version. If you do not provide a vanity here, an auto-generated ID will be used. See "Setting Site Vanities" on page 14.

 **NOTE** Only alphanumeric characters, periods, underscores, and hyphens are allowed.

- **Site Theme** (Optional) Select a theme to use when displaying various interface elements (e.g., login fields, 404 pages) to end users. If you do not select a theme, the default Central design will be used.
- **Site Trusted Domain Group** (Optional) Select a group containing domains that you want to allow in your output (see "Adding Trusted Domain Groups" on page 69 and "Adding Trusted Domains" on page 70). For example, in one of your Flare topics maybe you have inserted a link to an external website within an IFrame. Without setting that domain as trusted, the site might fail to display due to certain security policies.

- **Build** Select a destination (i.e., output) for the site.
 - a. From the **Project** field, select a project.
 - b. From the **Target** field, select a target.
 - c. From the **Branch** field, select a branch. You can also select "Any Branch" if you want the final field to list builds from all branches in the project.



- d. From the **Build** field, select a build. You can select a specific build (based on the build's ID, completion date, and time), or you can select **Latest Build** (i.e., the most recent successful build will be used automatically).

 **WARNING** If you are setting the site as "live" for the general public, we recommend you select a specific build. Otherwise, if you tell Central to use the latest build, you might end up with live output that is not yet ready for publication but happens to be the most recent build for the target. However, if the output is also set as "private" and intended only for individuals in your company, you might find it beneficial to choose the latest build. Just give it some thought when making a selection in this field.

 **TIP** If this is a site where the build might be updated over time, it is a good idea to set the previously live build to "keep," just in case you need to roll back to it at some point.

- **Set live** (Optional) You can set a site (i.e., destination output) as "live," which means it is published and therefore immediately be viewable by the public (or to certain individuals only if you make the site private). See "Setting Sites as Live" on page 26.
- **Include in search engines** (Optional) For each site that you set to "live" (but not "private"), you have the option to prevent the output from being used by search engines. You might consider doing this if you have multiple versions of product documentation, but you only want the most recent version to show up in search results. See "Excluding Live Sites From Search Engines" on page 45.

 **NOTE** When you enable this option, the server adds the site URL to a robots.txt file, which is generated by the server. This robots.txt file specifies that searches for content in that URL should be disallowed.

- **Set private** (Optional) You can set HTML5 outputs as "private." Users must log in to view the output, which means they must be part of your license as authors, SMEs, or viewers. See "Setting Sites as Private" on page 37.

5. Click **Save**.

Editing Sites

You can edit a site to adjust its settings.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Edit a Site

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site you want to edit.
3. With **Settings** selected on the left, make changes to any of the fields. For details on the fields, see "Creating Sites" on page 9. Also see any of the following:
 - "Setting Site Vanities" on the next page
 - "Setting Sites as Live" on page 26
 - "Setting Sites as Private" on page 37
 - "Excluding Live Sites From Search Engines" on page 45
4. Click **Save**.
5. On the left, select **Teams**. Then, click **Edit** and select or deselect the teams to be associated with the site. See "Associating Sites With Teams" on page 43.
6. Click **Save**.

Setting Site Vanities

After you generate a target and set the associated site to “live,” an ID is auto-generated to represent the target and build, and this is added to the URL, along with the entry file for the output (e.g., Default.htm).

☆ EXAMPLE

```
https://fictionsoft.mcoutput.com/64951/Default.htm
```

However, you can set a vanity for the output to produce a more meaningful URL that is easier to recognize when the site is live. This is also useful if you have multiple versions of a target's output and want to have a different URL for each version.

☆ EXAMPLE

```
https://fictionsoft.mcoutput.com/module1-v1/Default.htm
```

Permission Required?

For this activity, you must have the following permission setting:

Manage Sites

For more information about permissions, see the Central online Help.

How to Set a Vanity for a Site

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site you want to edit.
3. On the **Settings** page, complete the **Vanity** field.

 **NOTE** Only alphanumeric characters, periods, underscores, and hyphens are allowed.

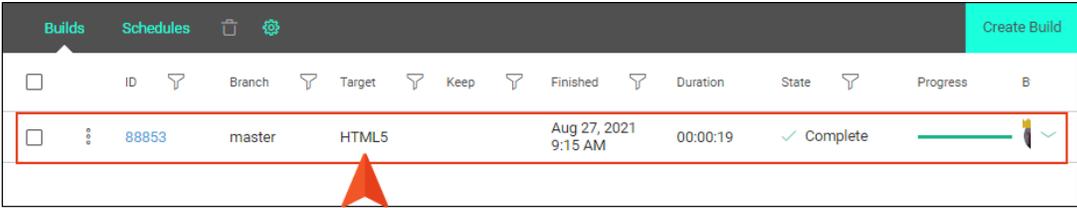
4. Click **Save**.

☆ **EXAMPLE** Your company has a product called FictionSoft Pro, and it consists of multiple modules. Your documentation team has therefore created a different Flare project for each of those modules. Suppose that you are in charge of the Module 3 project.

Periodically, your company releases a new version of the software. As a technical writer, you need to produce documentation for each of those releases.

In your Flare Module 3 project, you have an HTML5 target that you use to produce an online Help system. Instead of creating a different target for each release, you want to just keep using the same target.

You upload your Flare Module 3 project to Central, and you build output for it.



	ID	Branch	Target	Finished	Duration	State	Progress	B
<input type="checkbox"/>	88853	master	HTML5	Aug 27, 2021 9:15 AM	00:00:19	Complete	<div style="width: 100%;"></div>	

- ☆ You want this Module 3 Version 1 documentation to have a unique path, different than the paths for other modules, and different than later versions of Module 3. So you create a new site for this output. You decide to name it **M3 H5 V1**, and you give it a vanity with a similar name: **mod3-h5-v1**.

Create Site ✕

Name
M3 H5 V1

Domain
fictionsoftinc.mcoutputqa.com

Vanity
mod3-h5-v1

Site Theme
Site Trusted Domain Group

Build

Set live

Include in search engines

Set private ?

URL Preview
Please select a build.

Cancel Save

☆ The first part of this name/vanity (mod3) refers to the project name (Module 3), to keep it distinct from the other projects. The second part (h5) refers to the kind of target (HTML5), to keep it distinct from the many PDFs you will also be producing for that project. And the third part (v1) refers to the version number (Version 1), to keep it distinct from later versions.

When selecting the build, you choose the Module 3 project, the HTML5 target, and the master branch. Finally, you choose the build that you know is ready for publication.

Create Site [X]

Name
M3 H5 V1

Domain
fictionsoftinc.mcoutputqa.com

Vanity
▼ mod3-h5-v1

Site Theme
▼ Site Trusted Domain Group ▼

Build

M3 Module3 [Target Icon] HTML5 [Branch Icon] master [Build Icon] 88853 ▼

Set live

Include in search engines

Set private ?

URL Preview
https://qa.madcaprnd.com/publish/fictionsoftinc/07df8218d6c5447383307d608758d7d8/Default.htm

Cancel Save

☆ You also click **Live** to make the output available to your audience.

Create Site ✕

Name
M3 H5 V1

Domain **fictionsoftinc.mcoutputqa.com** Vanity **mod3-h5-v1**

Site Theme **Site Trusted Domain Group**

Build

M3 Module3 HTML5 master 88853

Set live

Include in search engines

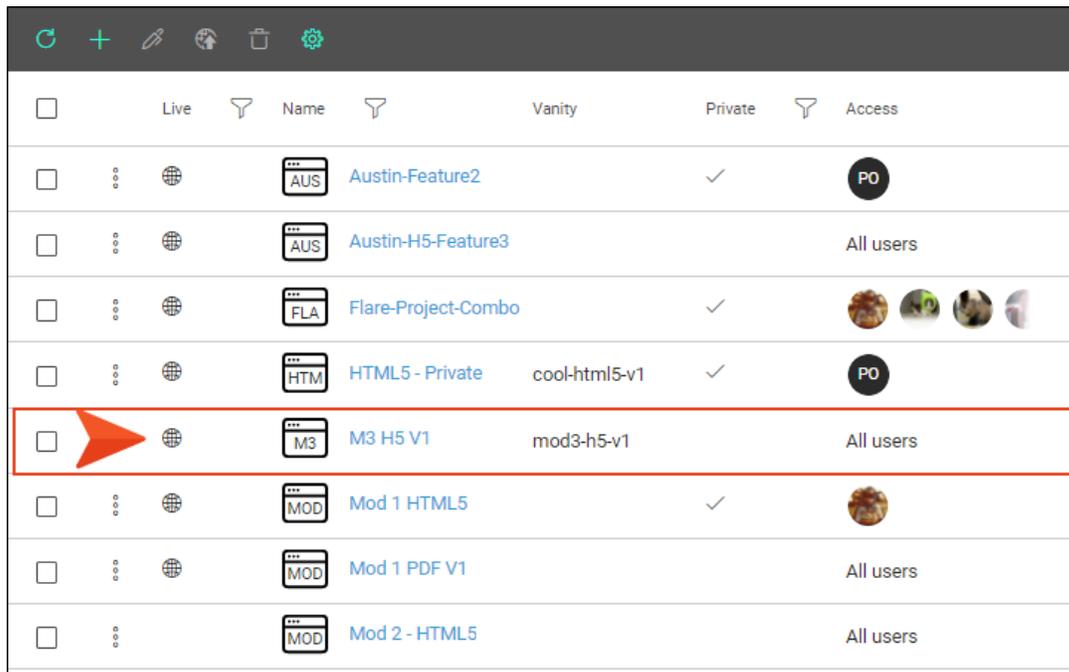
Set private [?](#)

URL Preview
fictionsoftinc.mcoutputqa.com/mod3-h5-v1/Default.htm

Cancel Save



☆ After clicking **Save**, the profile opens. You close the profile and see the site has the live icon next to it.



<input type="checkbox"/>	Live	Name	Vanity	Private	Access
<input type="checkbox"/>		AUS Austin-Feature2		✓	PO
<input type="checkbox"/>		AUS Austin-H5-Feature3			All users
<input type="checkbox"/>		FLA Flare-Project-Combo		✓	
<input type="checkbox"/>		HTM HTML5 - Private	cool-html5-v1	✓	PO
<input type="checkbox"/>		M3 M3 H5 V1	mod3-h5-v1		All users
<input type="checkbox"/>		MOD Mod 1 HTML5		✓	
<input type="checkbox"/>		MOD Mod 1 PDF V1			All users
<input type="checkbox"/>		MOD Mod 2 - HTML5			All users

☆ When the site row is expanded, you notice that the URL has the site vanity. This is also indicated in the Vanity column of the grid.

	Live	Name	Vanity	Private	Access
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Austin-Feature2		<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Austin-H5-Feature3		<input checked="" type="checkbox"/>	All users
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Flare-Project-Combo		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	HTML5 - Private	cool-html5-v1	<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	M3 H5 V1	mod3-h5-v1	<input checked="" type="checkbox"/>	All users
<p>Module3 HTML5 88853 - Aug 27, 2021 9:15 AM</p> <p>https://fictionsoftinc.mcoutputqa.com/mod3-h5-v1/Default.htm</p> <p>Set Live: November 30, 2021 by Paul Stoeckl Vanity URL: mod3-h5-v1</p>					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mod 1 HT...		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Mod 1 PDF V1		<input checked="" type="checkbox"/>	All users

- ☆ Sometime later, you are ready to publish output for Version 2. So you push your changes up to Central and build the target again. You also create a new site and name it similar to the first one, except with a reference to Version 2 (**M3 H5 V2**). And it also has a site vanity named in the same way: **mod3-h5-v2**.

Create Site ✕

Name
M3 H5 V2

Domain
fictionsoftinc.mcoutputqa.com

Vanity
▼ mod3-h5-v2

Site Theme
▼ Site Trusted Domain Group ▼

Build
▼

Set live

Include in search engines

Set private ?

URL Preview
Please select a build.

Cancel Save

- ☆ When selecting the build, you choose the Module 3 project, the HTML5 target, and the master branch. But this time, you choose the newer build for Version 2 that you know is ready for publication.

Create Site ✕

Name
M3 H5 V2

Domain
fictionsoftinc.mcoutputqa.com

Vanity
▼ mod3-h5-v2

Site Theme
▼ Site Trusted Domain Group

Build

M3 Module3 HTML5 master 90222 ▼

Set live

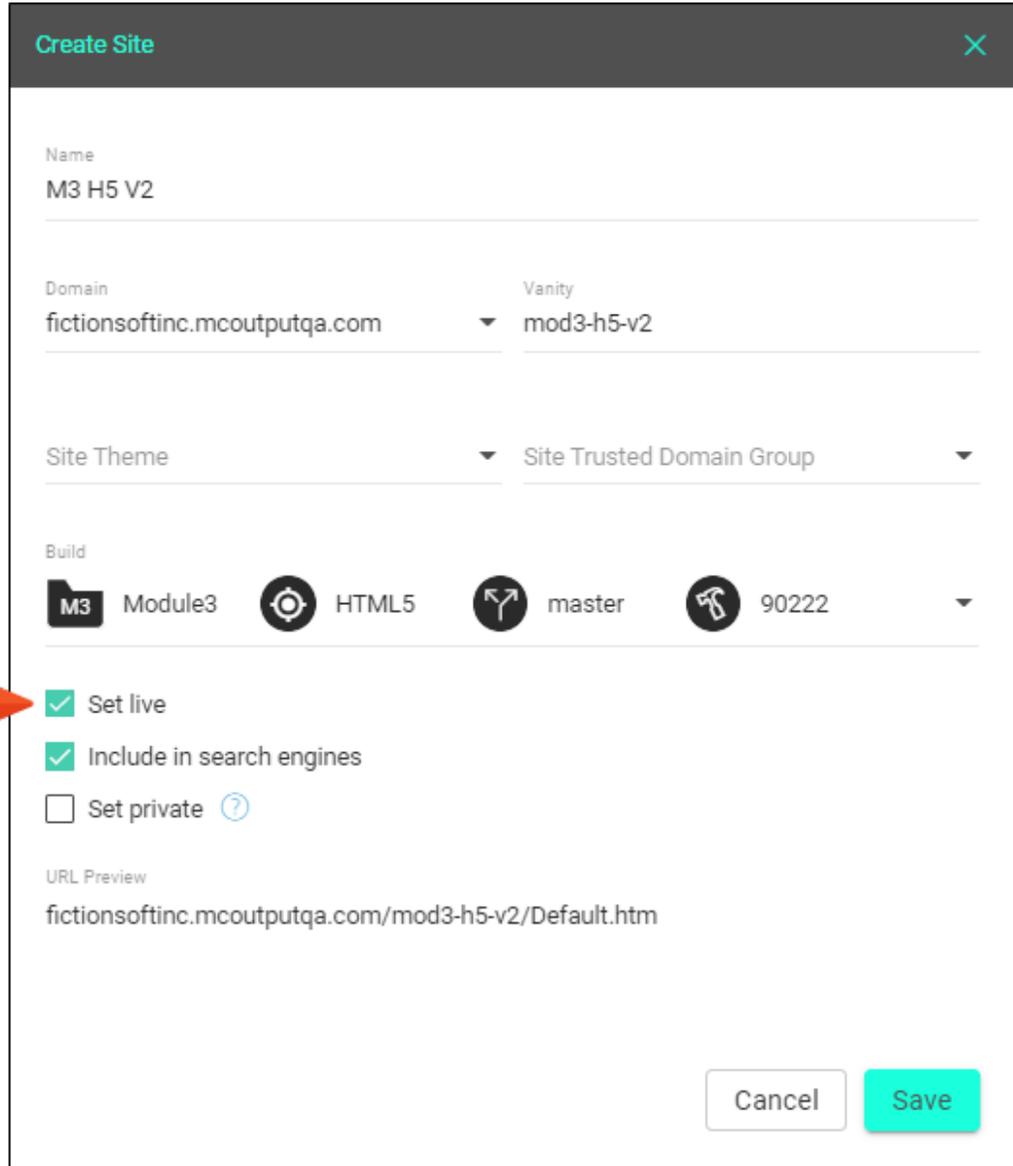
Include in search engines

Set private ?

URL Preview
https://qa.madcaprnd.com/publish/fictionsoftinc/401d94bb961f4371900647b946932925/Default.htm

Cancel Save

☆ You also click **Live** to make the output available to your audience.



Create Site ✕

Name
M3 H5 V2

Domain
fictionsoftinc.mcoutputqa.com

Vanity
mod3-h5-v2

Site Theme
Site Trusted Domain Group

Build
M3 Module3 HTML5 master 90222

Set live

Include in search engines

Set private [?](#)

URL Preview
fictionsoftinc.mcoutputqa.com/mod3-h5-v2/Default.htm

Cancel Save

☆ After clicking **Save**, the profile opens. You close the profile and see the new site next to the previous one.

<input type="checkbox"/>	Live	Name	Vanity	Private	Access
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Austin-Feature2		<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input type="checkbox"/>	Austin-H5-Feature3		<input type="checkbox"/>	All users
<input type="checkbox"/>	<input type="checkbox"/>	Flare-Project-Combo		<input checked="" type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	HTML5 - Private	cool-html5-v1	<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input type="checkbox"/>	M3 H5 V1	mod3-h5-v1	<input type="checkbox"/>	All users
<input type="checkbox"/>	<input type="checkbox"/>	M3 H5 V2	mod3-h5-v2	<input type="checkbox"/>	All users

Module3 | HTML5 | 90222 - Nov 30, 2021 10:27 AM
<https://fictionsoftinc.mcoutputqa.com/mod3-h5-v2/Default.htm>

Set Live: November 30, 2021 by Paul S
Vanity URL: mod3-h5-v2

☆ The grid columns show that the two builds from the same target are using different URLs, and both are set to "live."

<input type="checkbox"/>	Live	Name	Vanity	Private	Access
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Austin-Feature2		<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Austin-H5-Feature3		<input type="checkbox"/>	All users
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Flare-Project-Combo		<input checked="" type="checkbox"/>	[User Avatars]
<input type="checkbox"/>	<input checked="" type="checkbox"/>	HTML5 - Private	cool-html5-v1	<input checked="" type="checkbox"/>	PO
<input type="checkbox"/>	<input checked="" type="checkbox"/>	M3 H5 V1	mod3-h5-v1	<input type="checkbox"/>	All users
<input type="checkbox"/>	<input checked="" type="checkbox"/>	M3 H5 V2	mod3-h5-v2	<input type="checkbox"/>	All users

Module3 | HTML5 | 90222 - Nov 30, 2021 10:27 AM
<https://fictionsoftinc.mcoutputqa.com/mod3-h5-v2/Default.htm>

Set Live: November 30, 2021 by Paul S
Vanity URL: mod3-h5-v2

Setting Sites as Live

You can set a site (i.e., destination output) as "live," which means it is published and therefore immediately be viewable by the public (or to certain individuals only if you make the site private).

Permission Required?

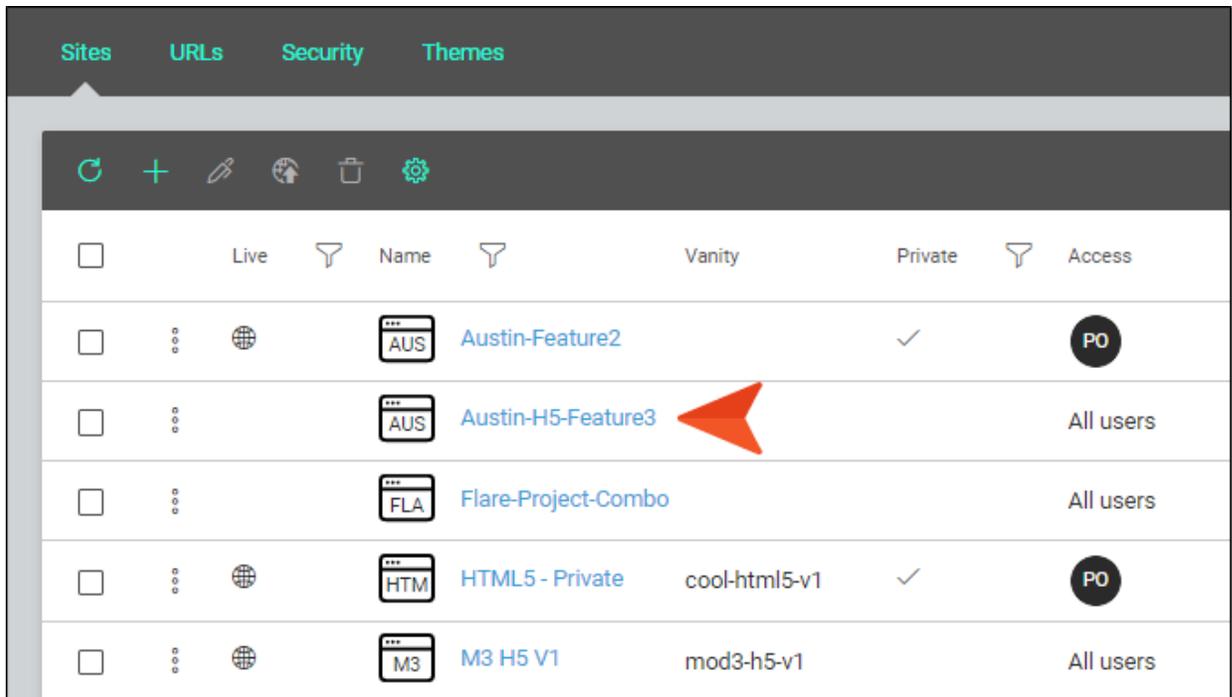
For this activity, you must have the following permission setting:



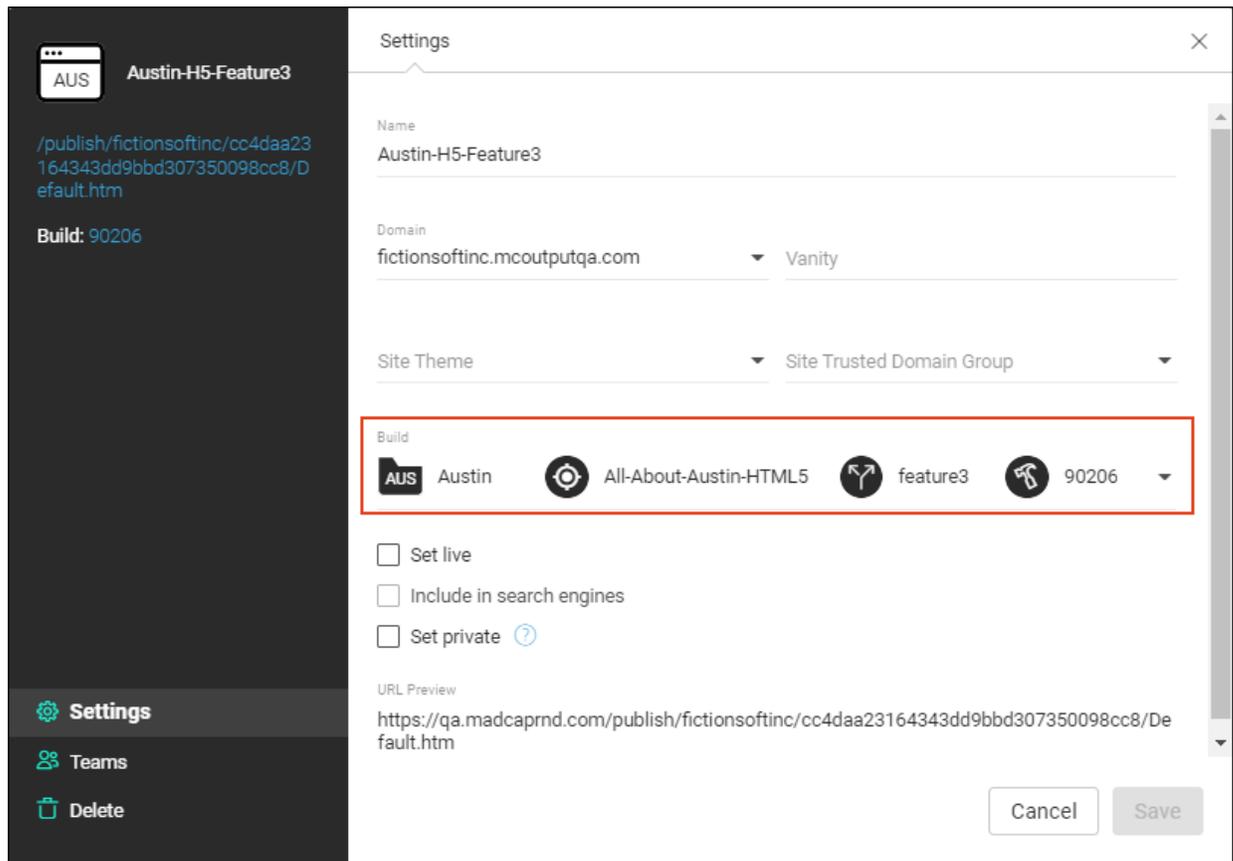
For more information about permissions, see the Central online Help.

How to Set a Site as Live

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site that you want to set as "live."



3. On the **Settings** page, click the **Build** field and select the project, branch, and build you want to be associated with the live site.



✓ **TIP** Unless the live site is also set as private and intended for internal purposes in your company, it is recommended that you associate the live site with a specific build when creating or editing the site, rather than choosing the "Latest Build" option. Otherwise, a build that isn't yet ready to be published might end up being the live output that your customers see.

4. Select **Set live**.

The screenshot shows a 'Settings' dialog box for a project named 'Austin-H5-Feature3'. The dialog is divided into two main sections: a dark sidebar on the left and a main content area on the right. The sidebar contains a menu with 'Settings' (highlighted), 'Teams', and 'Delete'. The main content area has a title bar 'Settings' with a close button. Below the title bar, the 'Name' field is 'Austin-H5-Feature3'. The 'Domain' field is 'fictionsoftinc.mcoutputqa.com' with a 'Vanity' dropdown. The 'Site Theme' and 'Site Trusted Domain Group' fields are also present. The 'Build' section shows a sequence of icons and labels: 'AUS Austin', 'All-About-Austin-HTML5', 'feature3', and '90206'. Below the build section, there are three checkboxes: 'Set live' (checked), 'Include in search engines' (checked), and 'Set private' (unchecked). A red arrow points to the 'Set live' checkbox. At the bottom right, there are 'Cancel' and 'Save' buttons. The URL preview at the bottom is 'fictionsoftinc.mcoutputqa.com/151426/Default.htm'.

5. Click **Save** and close the profile. An icon is shown next to the site, and if you click the row to expand it, the URL for the published output is shown.

<input type="checkbox"/>	Live		Name		Vanity	Private		Access
<input type="checkbox"/>			Austin-Feature2			<input checked="" type="checkbox"/>		
<input type="checkbox"/>			Austin-H5-Feature3			<input type="checkbox"/>		All users
Austin All-About-Austin-HTML5 90206 - Nov 30, 2021 8:44 AM						Set Live: November 30, 2021 b		
https://fictionsoftinc.mcoutputqa.com/151426/Default.htm						Vanity URL: <i>Vanity not set</i>		
<input type="checkbox"/>			Flare-Project-Combo			<input type="checkbox"/>		All users
<input type="checkbox"/>			HTML5 - Private		cool-html5-v1	<input checked="" type="checkbox"/>		
<input type="checkbox"/>			M3 H5 V1		mod3-h5-v1	<input type="checkbox"/>		All users

Also, if you look on the Builds page for projects, you will see a live link icon  in that build row. This icon indicates that the build is associated with a live site, but that the live status is not set here, but rather on the Sites page.

<input type="checkbox"/>	ID	Branch	Target	Keep	Finished	Du
<input type="checkbox"/>	90211	feature3	All-About-Austin-HTML5		Nov 30, 2021 9:23 AM	00
<input type="checkbox"/>	90206	feature3	All-About-Austin-HTML5 		Nov 30, 2021 8:44 AM	00
Private URL: /publish/fictionsoftinc/cc4daa23164343dd9bbd307350098cc8/Default.htm						
Sites: Austin-H5-Feature3						
<input type="checkbox"/>	90080	feature1	All-About-Austin-PDF		Nov 29, 2021 7:42 AM	01
<input type="checkbox"/>	90076	feature1	All-About-Austin-HTML5 ✓		Nov 29, 2021 7:42 AM	16
<input type="checkbox"/>	90059	feature2	All-About-Austin-HTML5 		Nov 27, 2021 9:44 AM	00

 **NOTE** To remove the “live” status, click  again.

Rolling Back to a Previous Live Output

Periodically, it is possible that you need to roll back to a previous build that was associated with a live site. For this reason, Flare automatically sets previous live builds to "keep." You can also set builds to "keep" manually. The keep setting makes it easier to identify the build to roll back to, and it also prevents a user from accidentally deleting that build.

Permission Required?

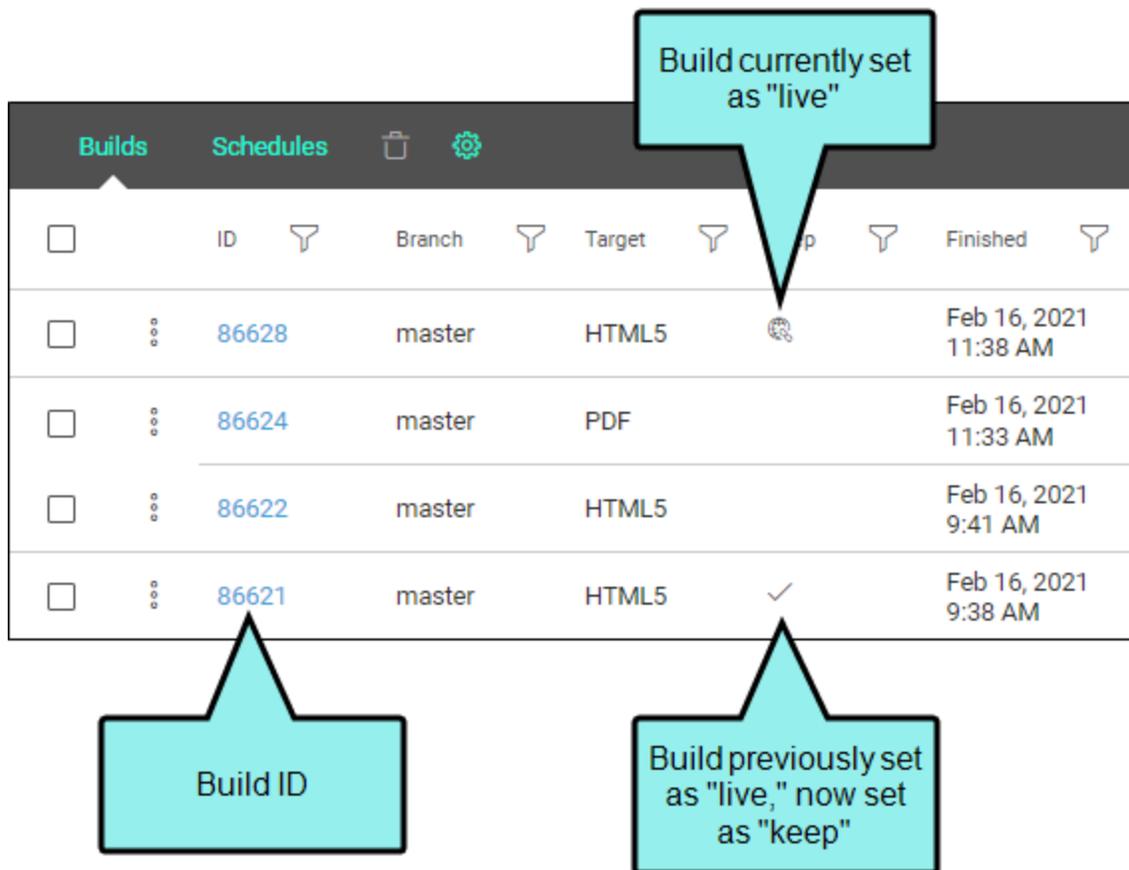
For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Roll Back to a Previous Live Output

1. First, you need to know which build you want to roll back to. So select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Builds**.
3. In the grid, look for the keep icon next to the build that was previously set as "live." Make note of the ID for the build.



4. On the left side of the interface, click **Sites**.
5. Click the name of the site you want to edit.
6. On the **Settings** page, click the **Build** drop-down.

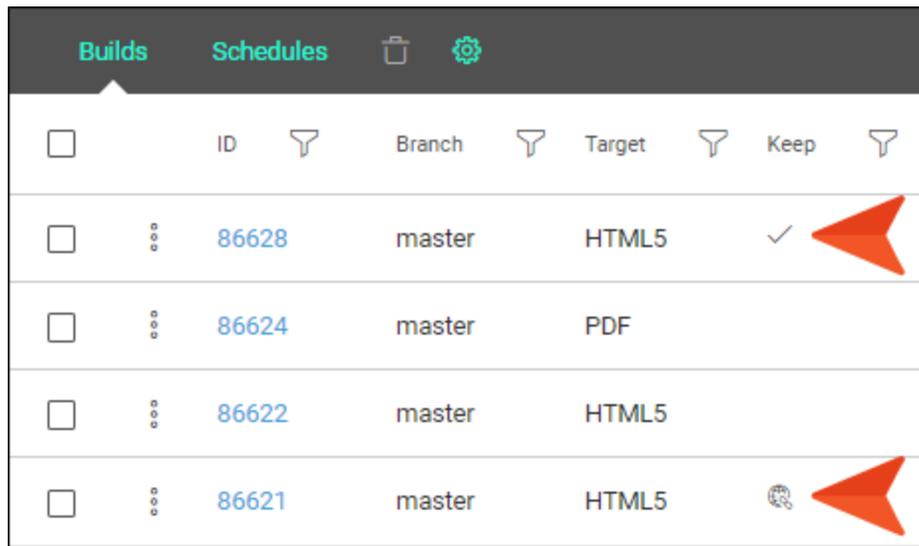
- From the **Build** field at the bottom, select the build that was previously used for the live output (i.e., the one with the ID that you noted on the Builds page).

The screenshot shows the 'Settings' interface for a module named 'Mod 1 HTML5'. On the left, a dark sidebar contains the module name, a URL, the current build ID '86628', and the live date 'Jul 04, 2021 3:36 PM'. Below this are navigation options: 'Settings', 'Teams', and 'Delete'. The main content area is titled 'Settings' and includes fields for Name, Domain, Site Theme, and Site Trusted Domain Group. A 'Build' field is highlighted with a red box, showing a dropdown menu with icons for 'M1', 'Module1', 'HTML5', 'master', and '86628'. Below this, a 'Project' section for 'Module1' displays a list of build options: 'Latest Build', '86628 - Feb 16, 2021 11:38 AM', '86622 - Feb 16, 2021 9:41 AM', and '86621 - Feb 16, 2021 9:38 AM'. The '86621' build is highlighted with a red box and an orange arrow from the sidebar. At the bottom, there are 'Clear' and 'Done' buttons.

8. Click **Save**. That build is now associated with the live site.

The screenshot shows a 'Settings' dialog for a module named 'Mod 1 HTML5'. The left sidebar contains a 'MOD' icon, the module name, a URL, build number '86621', and live date 'Jul 04, 2021 3:36 PM'. The main settings area includes fields for Name, Domain, Site Theme, and Site Trusted Domain Group. A 'Build' dropdown menu is highlighted with a red border, displaying 'M1 Module1 HTML5 master 86621'. Below this are three checkboxes: 'Set live' (checked), 'Include in search engines' (unchecked), and 'Set private' (checked). The URL preview is 'fictionsoftinc.mcoutputqa.com/150642/Default.htm'. 'Cancel' and 'Save' buttons are located at the bottom right.

On the project's Builds page, notice that the live link icon  is shown next to the build you selected, and the previously live build now has the keep icon  next to it.



<input type="checkbox"/>	ID	Branch	Target	Keep
<input type="checkbox"/>	86628	master	HTML5	<input checked="" type="checkbox"/>
<input type="checkbox"/>	86624	master	PDF	
<input type="checkbox"/>	86622	master	HTML5	
<input type="checkbox"/>	86621	master	HTML5	

If you want to delete the build that you replaced, you can remove the keep setting on it (by clicking the three dots next to it and from the menu selecting **Toggle Keep**), and then remove the build.

Setting Sites as Private

You can produce private output that requires a user to log in with an email and Central password. Without credentials, people cannot see the output. It is possible to set private output for all output types supported by Central. Also, accessing private output is not limited to people in your company. Central has a free viewer user type that you can use to add any of your customers to your Central license, and then give them access to live private output.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Set Output as Private

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site you want to edit.
3. On the **Settings** page, select **Set private**.
4. Make sure **Set Live** is also selected.

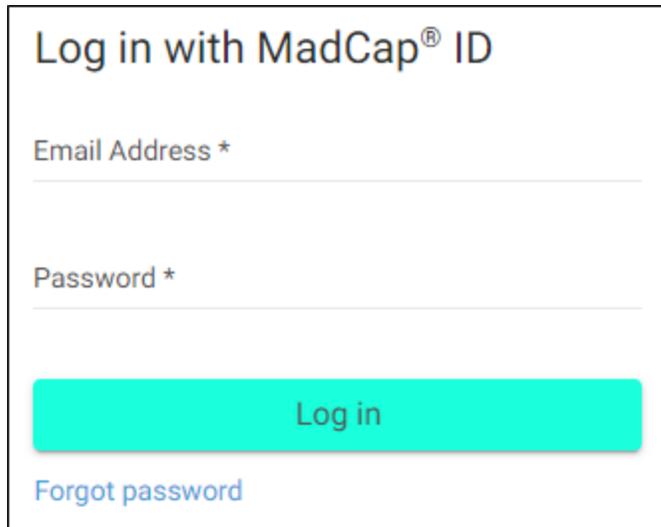
 **NOTE** If the site is not set as "live," the private setting has no effect on the output. In other words, only authors will be able to access it; SMEs and viewers cannot see the output.

5. Click **Save**.
6. On the left side of the profile, select **Teams**. Then, click **Edit** and choose the team(s) to associate with the site. Any users that you want to have access to the private output must be on one of the teams that you associate with the site.
7. Click **Save** and close the profile.

 **NOTE** If you have older published output and want to make it private, you might need to rebuild that output. Then associate the new build with the private site.

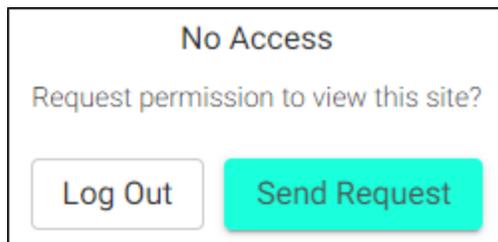
What Users See

Once a site is set to "private" and "live" in Central, "login" fields automatically display when a user tries to open the output.



The screenshot shows a login form titled "Log in with MadCap® ID". It contains two input fields: "Email Address *" and "Password *". Below the fields is a red "Log in" button and a blue "Forgot password" link.

If the user is not associated with a team for the site, or if the team has no site associated with it, a "no access" message displays.

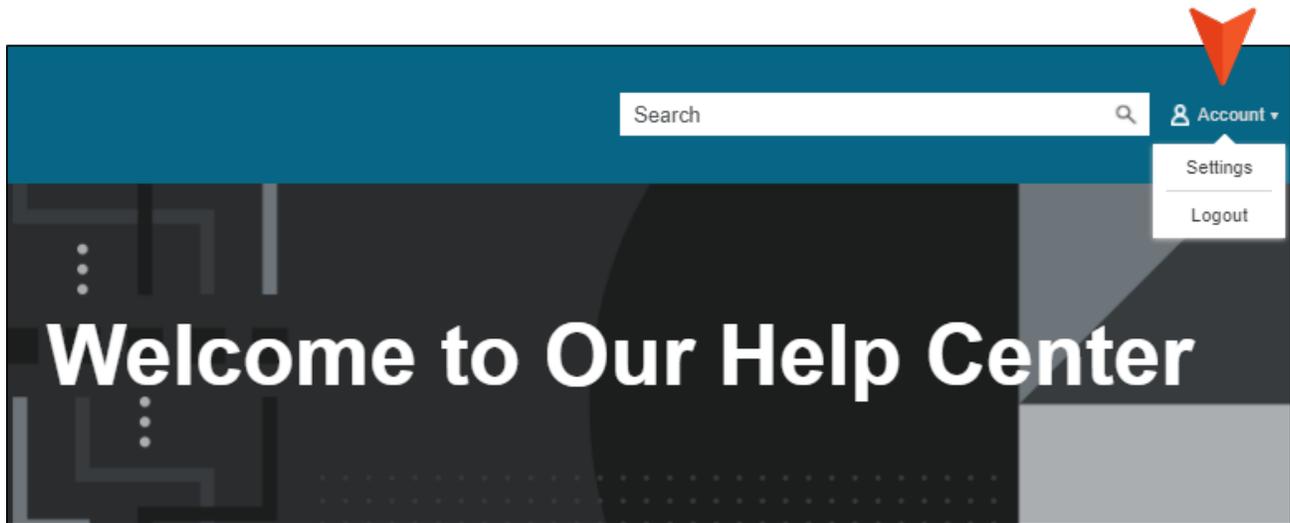


The screenshot shows a "No Access" message. It asks "Request permission to view this site?" and provides two buttons: "Log Out" and "Send Request".

If the output is not set to private, neither of these are shown and the full output opens immediately.

After users log in to see private output, an account link displays in the output interface for HTML5 targets (not for other output types). If the output is not set to private, this link is not shown. When users hover over the link, a menu shows two options.

- **Settings** Opens the user's profile so it can be edited
- **Logout**



What's Noteworthy?

 **NOTE** From a skin in the Flare project, you can customize the location and look of the account link that displays in HTML5 output, but only if you are using Flare 2020 or newer. For older versions of Flare, the account link will still display in HTML5 output, but the skin functionality is not available to modify it. For details, see the Flare online Help.

 **NOTE** Private output is different from private URLs, which are automatically created for each build that you generate, whether that build is associated with a site or not. Private URLs can be useful for sharing output with certain co-workers when that documentation is still in a state of development, although you can use private outputs for that purpose as well.

- **Private URLs** Only users with an author seat can view a private URL.
- **Private Output** Users do not always need to have a paid seat on Central (depending on whether you set the site as "live"). On a site that is both live and private, users can simply be customers of your company using the viewer user type (as well as authors and SMEs on your license).

 **NOTE** You might encounter issues for "non-live" output when making a site private and the same build exists in another site but is not set as private. In cases such as this, the first site created "wins."

For example, you create a site and point it to an HTML5 build. You do not make the site live or private. Then you create a second site and point to the same build. You do not make this site live, but you do set it as private. When you open the URL for the second site, you expect it to show login fields, but it doesn't because it is redirected to the URL of the first site, which is not set as private. If you were to reverse this scenario, you would find yourself opening the URL for a site that isn't set as private, but you are redirected to the URL of the private site.

 **NOTE** Some output formats (such as HTML Help, WebHelp Plus, and Word) cannot be viewed from Central. If you have outputs such as these and set them as private, you will still see login fields when opening the output. After logging in, the output files are downloaded (which is the expected end result), but the browser page will spin.

What's Next?

To allow users (authors, SMEs, and/or viewers) to see private output, you need to:

1. Invite the users to the Central license.
2. Add the users to a team.
3. Associate the team with the site (also described in the steps above).

Associating Sites With Teams

You can associate a site with one or more teams. The primary reason for doing this is to make private output available to users. A user must be on a team that is associated with a private site in order to view the output.

 **NOTE** If your license is enabled for single sign-on (SSO) and you have private output, you can automate the process for inviting users (as viewers), as well as associating users and sites with a team. In the license settings, you can use an option to create viewer users on demand, and choose one or more teams to associate with that process. By simply providing new users with the link to the private output, they will be onboarded with the viewer seat type and added to the team(s) you designate. For more information see the online Help.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Associate a Site With Teams

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site you want to edit.
3. On the left, select **Teams**.
4. Click **Edit**.
5. Select the team(s) to associate with the site.
6. Click **Save**.

I Other Activities for Sites

In addition to the main activities, there are some other tasks you might perform regarding this feature.

- "Excluding Live Sites From Search Engines" on the next page
- "Setting Notifications for Sites" on page 46
- "Deleting Sites" on page 47

Excluding Live Sites From Search Engines

For each site that you set to “live” (but not “private”), you have the option to prevent the output from being used by search engines. You might consider doing this if you have multiple versions of product documentation, but you only want the most recent version to show up in search results.

When you enable this option, the server adds the site URL to a robots.txt file, which is generated by the server. This robots.txt file specifies that searches for content in that URL should be disallowed.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Exclude a Site From Search Engines

1. On the left side of the interface, click **Sites**.
2. With the **Sites** tab selected at the top, click the name of the site you want to edit.
3. On the **Settings** page, if the site is not already set to **Live** select that option.
4. Click **Include in search engines** to remove the check mark.
5. Click **Save** and close the profile.

Setting Notifications for Sites

In your account settings, you can choose when to be notified for specific activities. The user who is notified depends on the activity. For more information, see the online Help.

Notifications

Send notifications by

- Notification Center
- Email

Send notifications when

- Builds >
- Checklists >
- Licenses >
- Projects >
- Reports >
- Reviews >
- Sites
 - Set as "Live"
 - Site Created
 - Site Deleted
 - Site Updated
- Tasks >
- Teams >
- Users >

Settings

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

Cancel Save

Deleting Sites

Sites can be deleted when they are no longer needed. However, you cannot delete a site if it is set to "live." You must first remove the "live" setting before deleting it.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

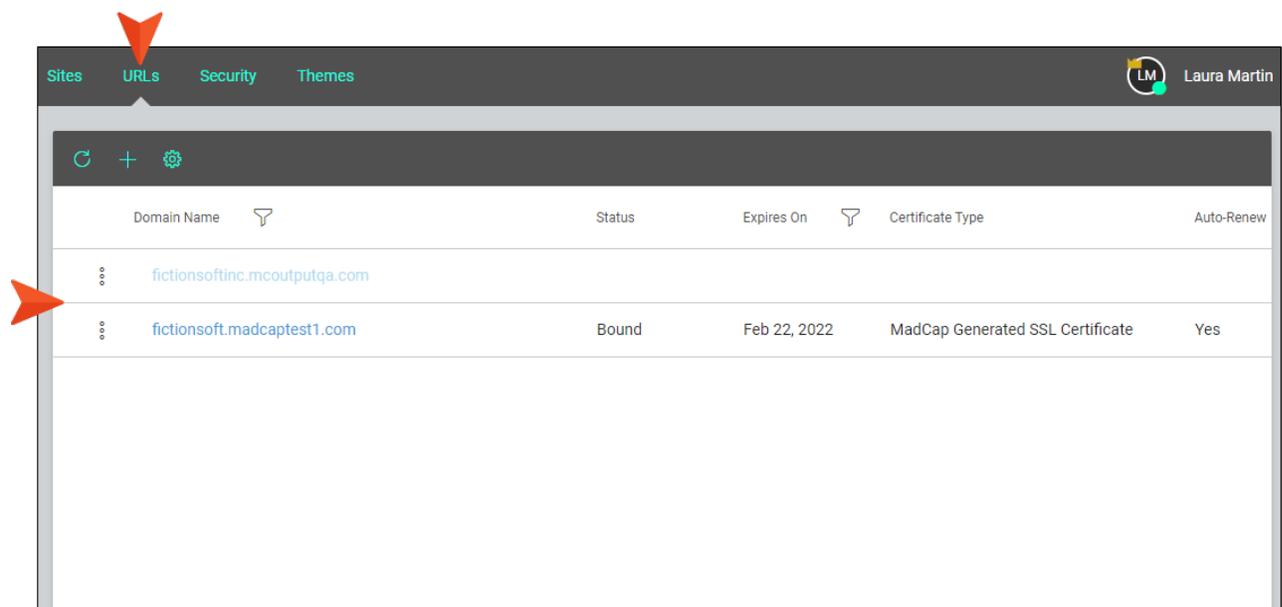
How to Delete a Site

1. On the left side of the interface, click **Sites**.
2. Click the check box next to the site you want to delete.
3. In the toolbar click .
4. In the field in the dialog, type `delete`.
5. Click **Delete**.

CHAPTER 3

URLs Page View

The URLs page view lets you create and manage all domains (i.e., URLs) for the license. Central provides a default domain that you can use, and you have the option of changing the vanity for it. However, many users just leave it alone, because in most cases the vanity is simply the name of your company. You also have the option of mapping to custom host domains if you want users to see your company's URL instead of Central's.



This chapter discusses the following:

General Information for Domains	49
Main Activities for Domains	53

I General Information for Domains

There are various pieces of general information you should know if you plan to use this feature.

- "Default and Host Mapped Domains" on the next page
- "Associating Domains With Sites" on page 52

Default and Host Mapped Domains

Central provides a default domain that you can use, and it is displayed in gray text on the URLs page view. You also have the option of adding your own host mapped domains, as many as you need.

- **Default Central Domain** The default Central URL begins with your license (e.g., company) name, which is the subdomain. This is followed by a period, then “mcoutput.com,” which is Central’s root domain. When these are combined, you have the full URL.

☆ EXAMPLE

```
https://fictionsoft.mcoutput.com
```

After you generate a target and set the associated site to “live,” an ID is auto-generated to represent the target and build, and this is added to the URL, along with the entry file for the output (e.g., Default.htm).

☆ EXAMPLE

```
https://fictionsoft.mcoutput.com/64951/Default.htm
```

However, you can add a vanity to the site (see “Setting Site Vanities” on page 14). The vanity will be used in place of the auto-generated ID, making the output easier to identify.

☆ EXAMPLE

```
https://fictionsoft.mcoutput.com/module1-v1/Default.htm
```

- **Host Mapped Domains** If you prefer end users to see your company's domain instead of Central's ("mcoutput.com"), you can create a CNAME (Canonical Name) to map to your own host domain.

☆ EXAMPLE

```
https://help.fictionsoft.net
```

A full URL for a host mapped domain might be something like the following (we've included a site vanity):

```
https://help.fictionsoft.net/module1-v1/Default.htm
```

Associating Domains With Sites

Whether you are using the default Central domain or host mapped domains (or both), any of the sites that you create can be associated with any of the domains on the URLs page view (see "Creating Sites" on page 9). You can associate each site with a different domain, or you can associate multiple sites with the same domain. It's up to you.

☆ **EXAMPLE** You are producing some knowledge bases and several online Help systems for your company, FictionSoft.

Perhaps you want all of the knowledge bases to point to `kb.fictionsoft.net`, and you want the online Help systems to point to `help.fictionsoft.net`.

Therefore, you can add those two host mapped domains to the URLs page view. Then, when you create a site, you can point to one of those two domains, depending on whether the output is a knowledge base or a Help system.

I Main Activities for Domains

Some activities are particularly common and important when it comes to this feature.

- "Setting the License Vanity" on the next page
- "Adding Host Mapped Domains" on page 57
- "Editing Host Mapped Domains" on page 67

Setting the License Vanity

When you first subscribe to Central, a license vanity is provided for you based on your license (e.g., company) name. This vanity is the prefix (or subdomain) of the default Central domain that is used for your outputs (e.g., **fictionsoft**.mcoutput.com). You can change this license vanity if you would like to use something else, although you cannot change the root Central domain (i.e., the last part, which is "mcoutput.com").

 **WARNING** Use caution when changing the license vanity. It is generally best to do this when your Central license is new and before you have set sites to “live.” If you have already published outputs and then decide to change the license vanity, any links to the older URL will be broken.

 **IMPORTANT** When changing your license vanity, keep in mind that MadCap Software is not responsible for other companies claiming a particular name before you are able to.

This chapter discusses the following:

Permission Required?

For this activity, you must have the following permission setting:

 **Server Management**

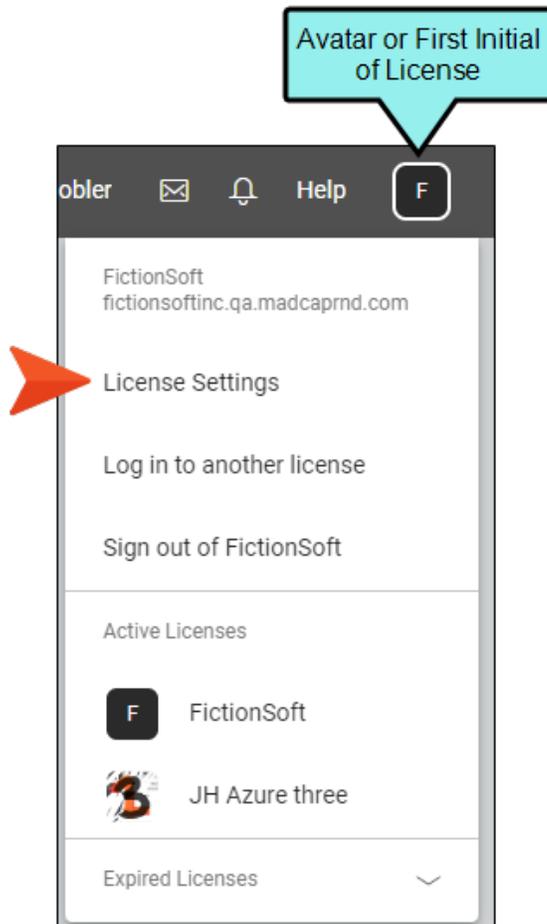
For more information about permissions, see the Central online Help.

How to Set the License Vanity

1. If your license is enabled for single sign-on (SSO), you will need to have your IT department update the application within your identity provider (IdP) to the changed vanity. Otherwise, you will not be able to log in to the license again after you change the vanity.

If you are not using SSO, you do not need to bother with this step.

2. In the upper-right of Central, click your license avatar (or the first letter of your license if you haven't yet chosen an avatar image) and select **License Settings**.



3. On the left, select **Settings**.

4. In the **Vanity** field, enter the subdomain you want to use for your license URL (only alpha characters and numbers are allowed).
5. Click **Save**.

 **NOTE** The original license key label is based on the company name when a Central license is purchased. The same is true for the license vanity (subdomain). If your company name has a space in it, that space is automatically removed. You can add the space back when you change your license key label. However, you cannot add a space when changing the license vanity.

 **NOTE** If you prefer end users to see your company's domain instead of Central's ("mcoutput.com"), you can create a CNAME (Canonical Name) to map to your own host domains. The output will still be hosted on Central servers, but the URL that you give to end users will be your company's domain. See "Adding Host Mapped Domains" on the next page.

Adding Host Mapped Domains

If you want to map to your company's own host domain instead of using the default Central domain, you can do so by creating a Canonical Name (CNAME) and following the steps below. You can add as many host mapped domains as you need. The output will still be hosted on Central servers, but the URL that you give to end users will be your company's domain.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

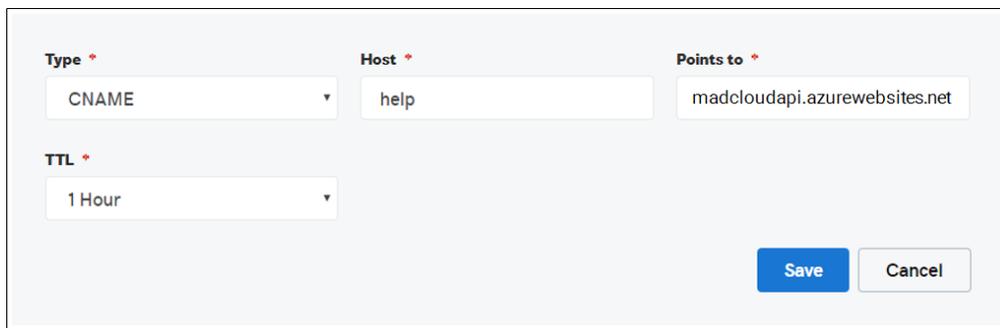
How to Add a Host Mapped Domain

1. After obtaining a domain and subdomain that you want to use, create a CNAME (a type of alias) on the registrar’s website. Point the CNAME to the MadCap Central API.

United States server API:

`madcloudapi.azurewebsites.net`

☆ **EXAMPLE** Your domain is `fictionsoft.com` on the United States server, and your subdomain is `help` (i.e., `help.fictionsoft.com`). If Godaddy is your registrar, you might set up your CNAME like this:



The screenshot shows a form for creating a CNAME record. It has four fields: 'Type' with a dropdown menu set to 'CNAME', 'Host' with a text input containing 'help', 'Points to' with a text input containing 'madcloudapi.azurewebsites.net', and 'TTL' with a dropdown menu set to '1 Hour'. At the bottom right, there are two buttons: 'Save' (blue) and 'Cancel' (grey).

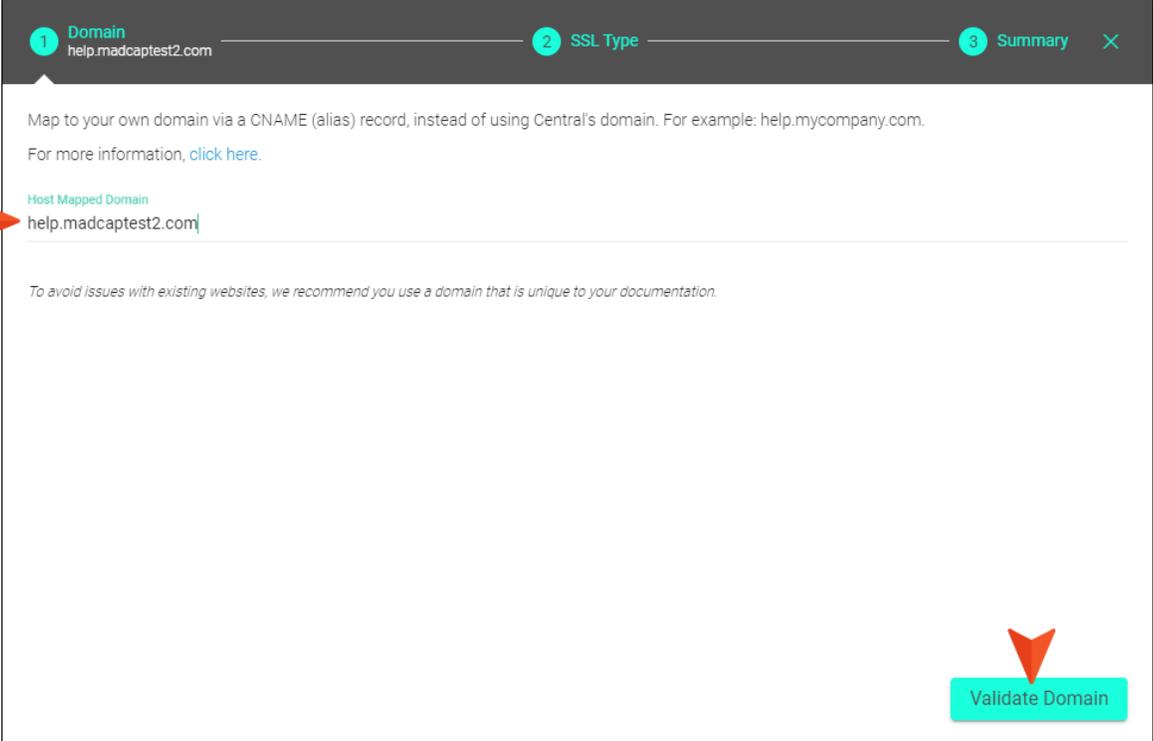
European server API:

`api-eugwc-prod.azurewebsites.net`

📄 **NOTE** You might need to involve an individual in your company, such as a system administrator, to set up the CNAME with the API. For details on creating a CNAME, please refer to the registrar’s website documentation.

2. On the left side of the interface, click **Sites**.
3. Select the **URLs** tab.
4. In the toolbar click .

5. In the wizard, type the host domain you want to use, and click **Validate Domain**.



The screenshot shows a wizard interface with three steps: 1. Domain, 2. SSL Type, and 3. Summary. The current step is 'Domain', where the domain 'help.madcaptest2.com' is entered. An orange arrow points to the 'Host Mapped Domain' input field. Another orange arrow points to the 'Validate Domain' button at the bottom right.

1 Domain
help.madcaptest2.com

2 SSL Type

3 Summary

Map to your own domain via a CNAME (alias) record, instead of using Central's domain. For example: help.mycompany.com.
For more information, [click here](#).

Host Mapped Domain
help.madcaptest2.com

To avoid issues with existing websites, we recommend you use a domain that is unique to your documentation.

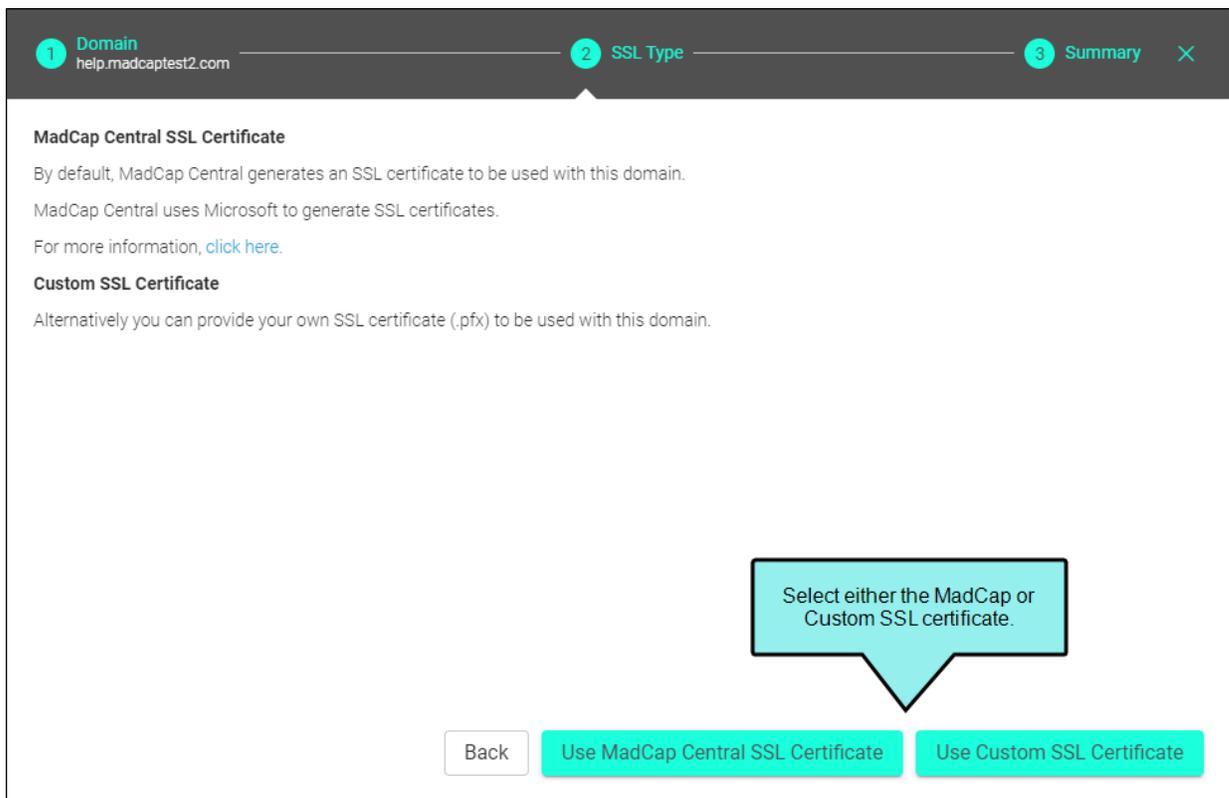
Validate Domain

 **NOTE** If the domain does not validate successfully, make sure the CNAME is set up correctly with the registrar.

6. Choose an SSL certificate.

- **Use MadCap Generated SSL Certificate** You might decide to select the MadCap secure certificate if your company's IT resources are limited or you are not concerned about using your own certificate.
- **Use Custom SSL Certificate** Select this option if your IT department prefers to use its own certificate, instead of MadCap's. After obtaining the Personal Information Exchange (.pfx) file from your IT department, click **Select Your File** to find and select it. Then enter the SSL password, and click **Next**.

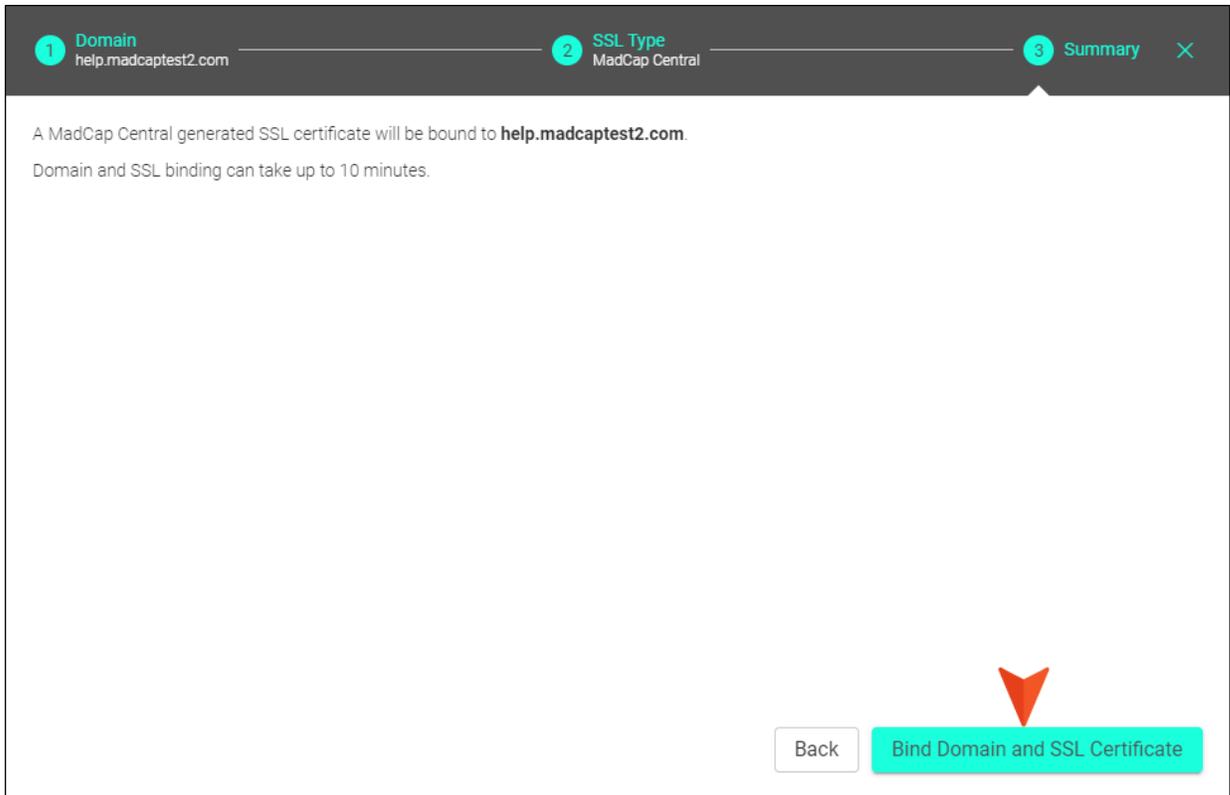
 **NOTE** Central supports only PFX certificates that require passwords.



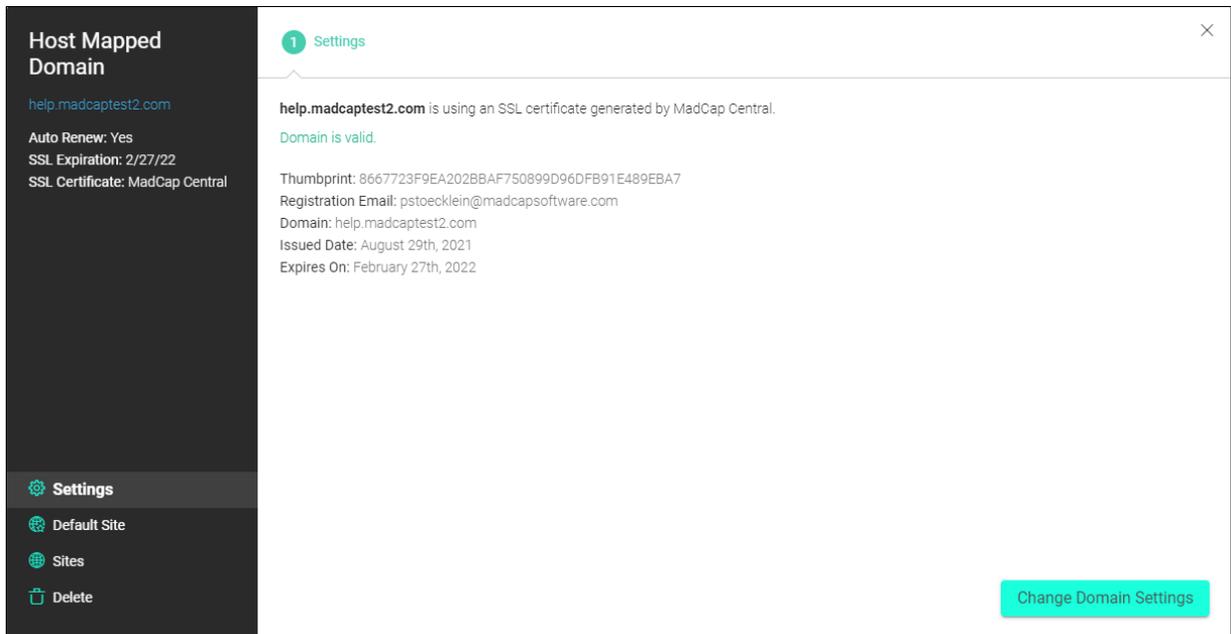
 **NOTE** It is recommended that you generate only one certificate in a 24-hour time period.

 **NOTE** Central uses Microsoft Azure to generate SSL certificates.

7. Select **Bind Domain and SSL Certificate**. (This process can take up to 10 minutes.)



When the domain is validated and bound, you can use the wizard to change host mapped domain settings.



If you click the **Change Domain Settings** button, that takes you back to the Domain page of the wizard to update and validate a new host mapped domain.

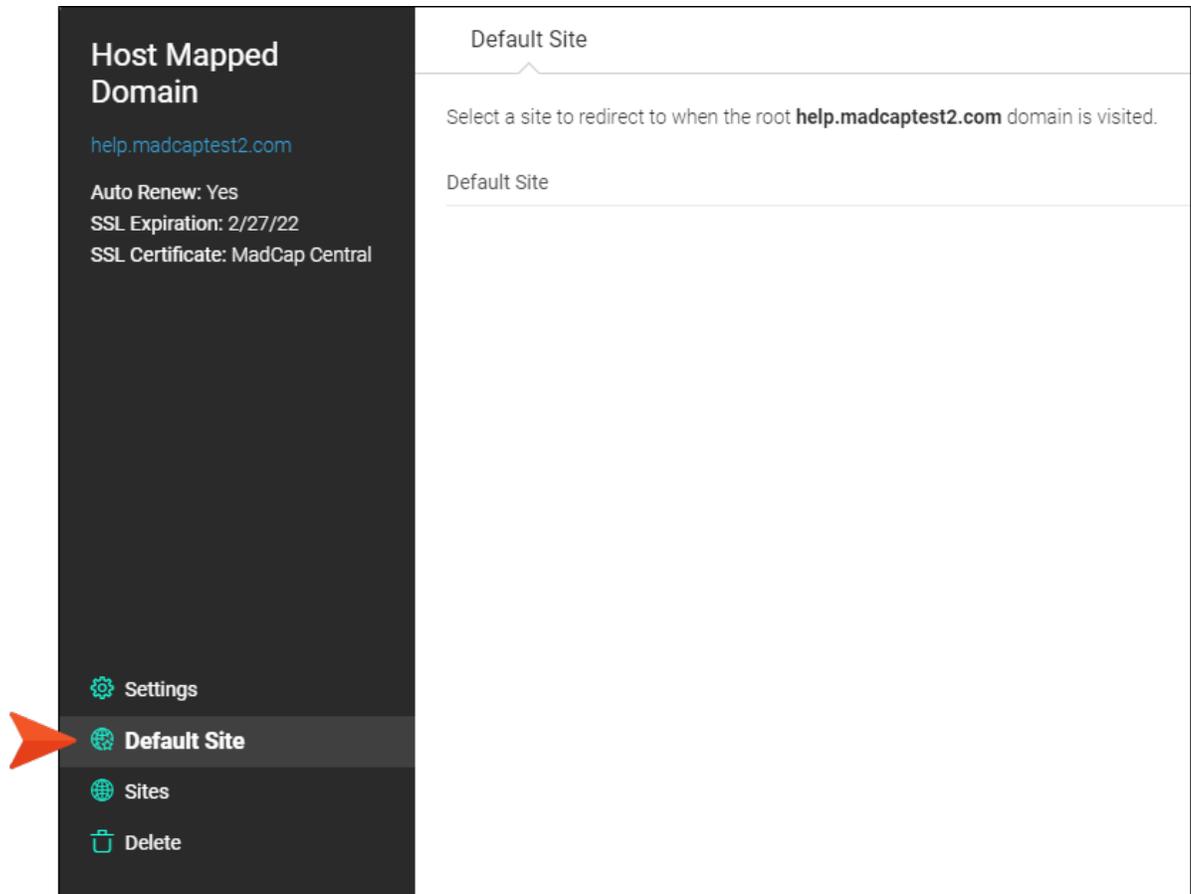
8. Click the **x** in the upper-right corner to close the wizard.

 **NOTE** If you have an older URL that you need to continue to use in order to maintain consistency with your company and prevent older links from breaking, you can create a redirect from that URL to your new domain. Ask the web administrator in your company for assistance with this.

How to Add a Default Site

You can select a site to redirect to when the root domain is visited.

1. On the left side of the interface, click **Sites**.
2. Select the **URLs** tab.
3. Click  next to the domain you want to edit and select **Edit**.
4. From the Host Mapped Domain wizard, select **Default Site**.



- From the **Default Site** drop-down, select a site.

Host Mapped Domain
help.madcaptest2.com
Auto Renew: Yes
SSL Expiration: 2/27/22
SSL Certificate: MadCap Central

Default Site
Select a site to redirect to when the root **help.madcaptest2.com** domain is visited.

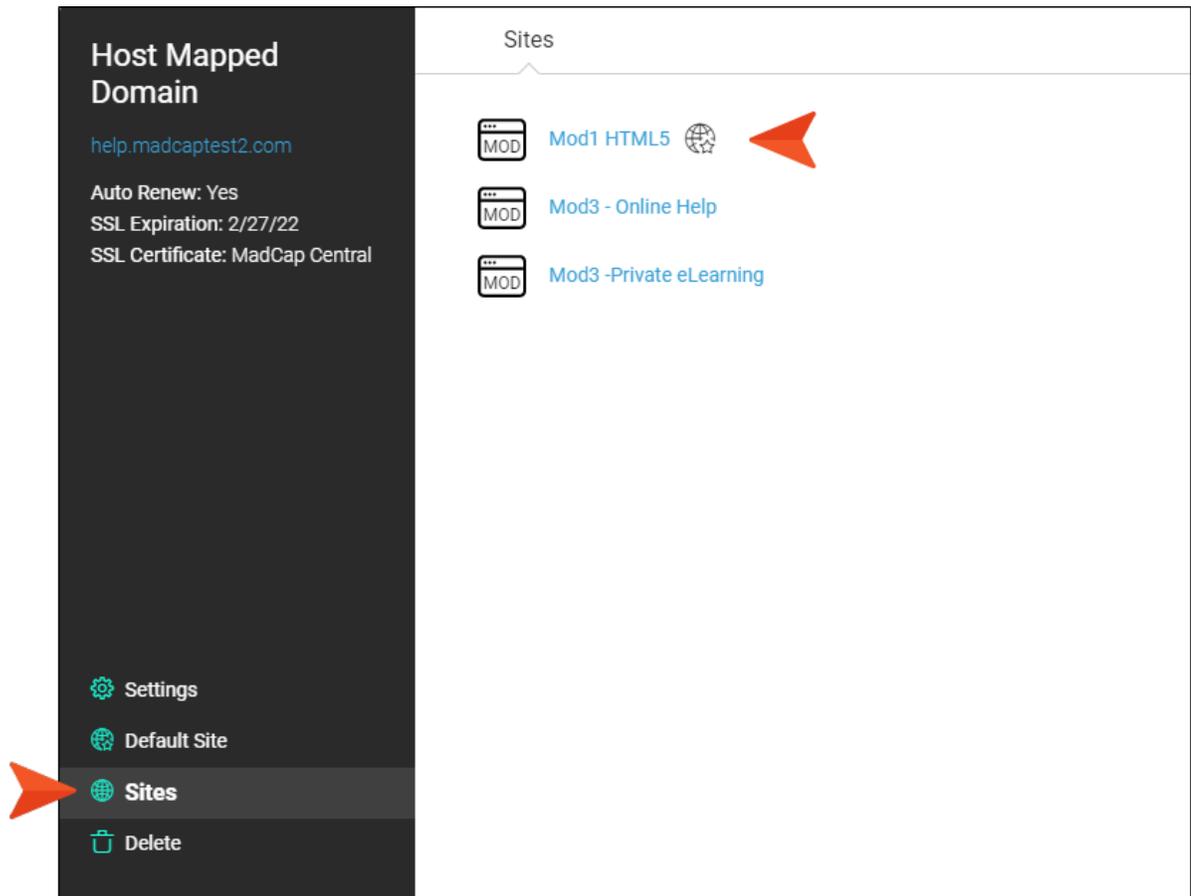
Default Site
MOD Mod1 HTML5

Settings
Default Site
Sites
Delete

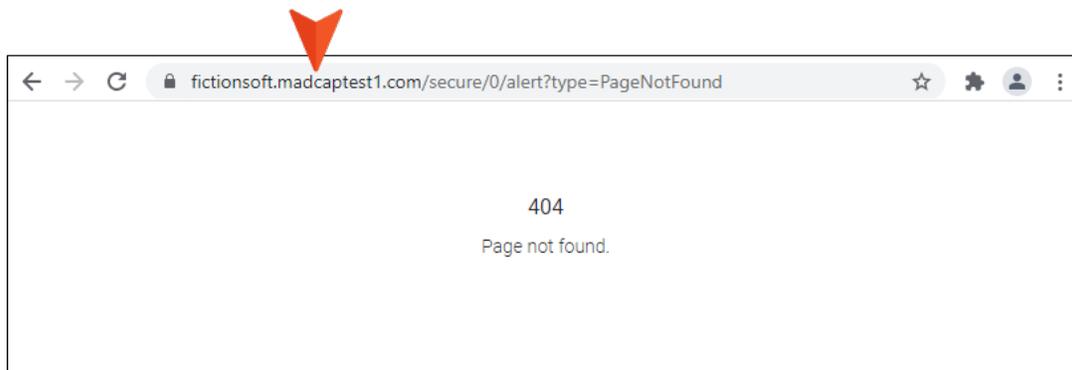
 **NOTE** Make sure the site you select is also associated with a custom domain.

- Click **Save**.

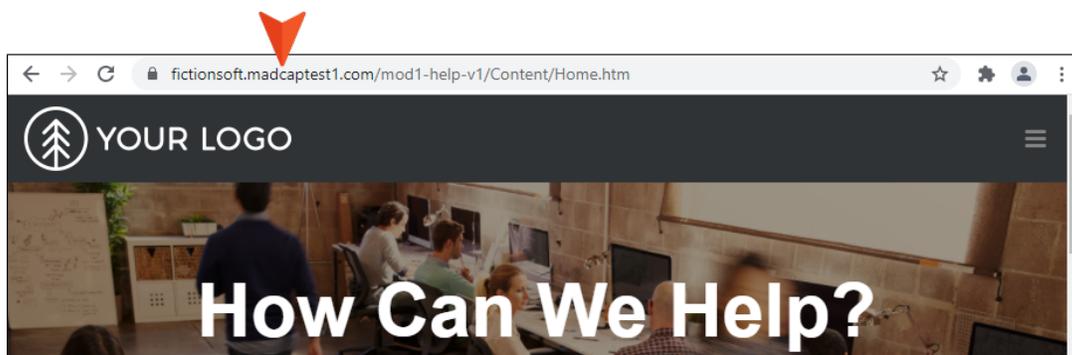
7. (Optional) You can quickly see which sites are associated to the host mapped domain by clicking **Sites**. The wizard lists the sites. If a site is set as the current default site, it is indicated as such by a globe/star icon.



☆ **EXAMPLE** If you don't set a default site, visiting a live URL root domain can result in a "404, page not found" error.



However, if you do set a default site, and you type the root domain into the browser's URL, it redirects to the assigned default site.



Editing Host Mapped Domains

You can make changes to a host mapped domain that you've already added.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

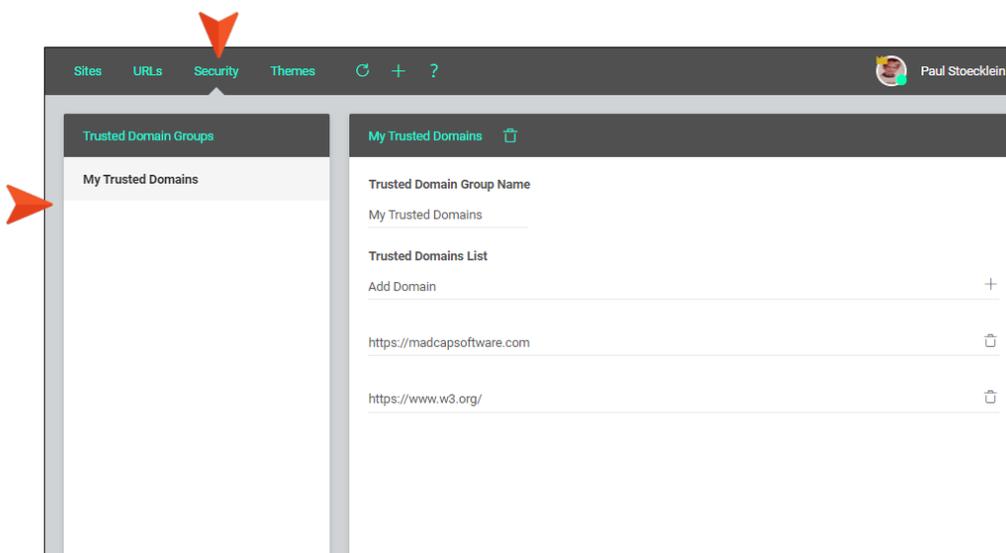
How to Edit a Host Mapped Domain

1. On the left side of the interface, click **Sites**.
2. Select the **URLs** tab.
3. Click  next to the domain you want to edit and select **Edit**.
4. Make changes in the Host Mapped Domain wizard. For field details, see "Adding Host Mapped Domains" on page 57.
5. Click **Save**.
6. Click the **x** in the upper-right corner to close the wizard.

CHAPTER 4

Security Page View

The Security page view lets you create groups of trusted domains to allow the publication of approved content. This feature might be necessary if you want to display one or more external sites within your output. For example, in one of your Flare topics maybe you have inserted a link to an external website within an IFrame. Without setting that domain as trusted, the site might fail to display due to certain security policies(see the *Security Whitepaper* PDF).



This chapter discusses the following:

Adding Trusted Domain Groups	69
Adding Trusted Domains	70

Adding Trusted Domain Groups

The first part to using trusted domains is to create one or more groups to store them in. You might only need one group for all of your trusted domains, but you can create multiple groups if you want.

Permission Required?

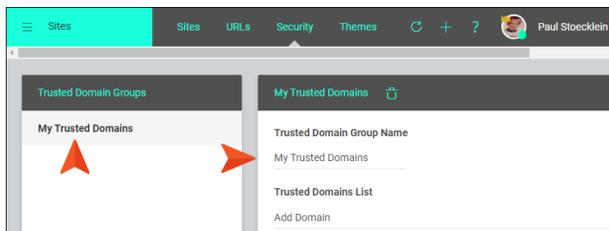
For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Add a Trusted Domain Group

1. On the left side of the interface, click **Sites**.
2. Select the **Security** tab at the top.
3. In the toolbar, click .
4. Enter a name for the group.
5. Click **Save**. The group is added on the left side of the page. Any domain URLs that you add to the group will be listed on the right.



 **NOTE** If you need to rename the group, you can do so on the right side of the page, under **Trusted Domain Group Name**.

Adding Trusted Domains

You can add as many trusted domains to a group as you need. By adding a URL as a trusted domain, it will be considered an approved site and can be displayed in your published output. For example, in one of your Flare topics maybe you have inserted a link to an external website within an IFrame. Without setting that domain as trusted, the site might fail to display due to certain security policies.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Add a Trusted Domain

1. On the left side of the interface, click **Sites**.
2. Select the **Security** tab at the top.
3. Make sure you have added a trusted domain group, and click it on the left side of the page to select it.
4. On the right side of the page, under **Trusted Domains List**, click in the **Add Domain** field and enter the domain (e.g., `https://madcapsoftware.com`). To help avoid cross-site scripting attacks, adhere to the following guidelines when completing this field.

Host Only allow resources to load from a specific host, with optional scheme, port, and path.



EXAMPLES

`example.com`

`*.example.com`

`https://*.example.com:12/path/to/file.js`

Scheme Only allow resources to load over a specific scheme; it should always end with a colon.

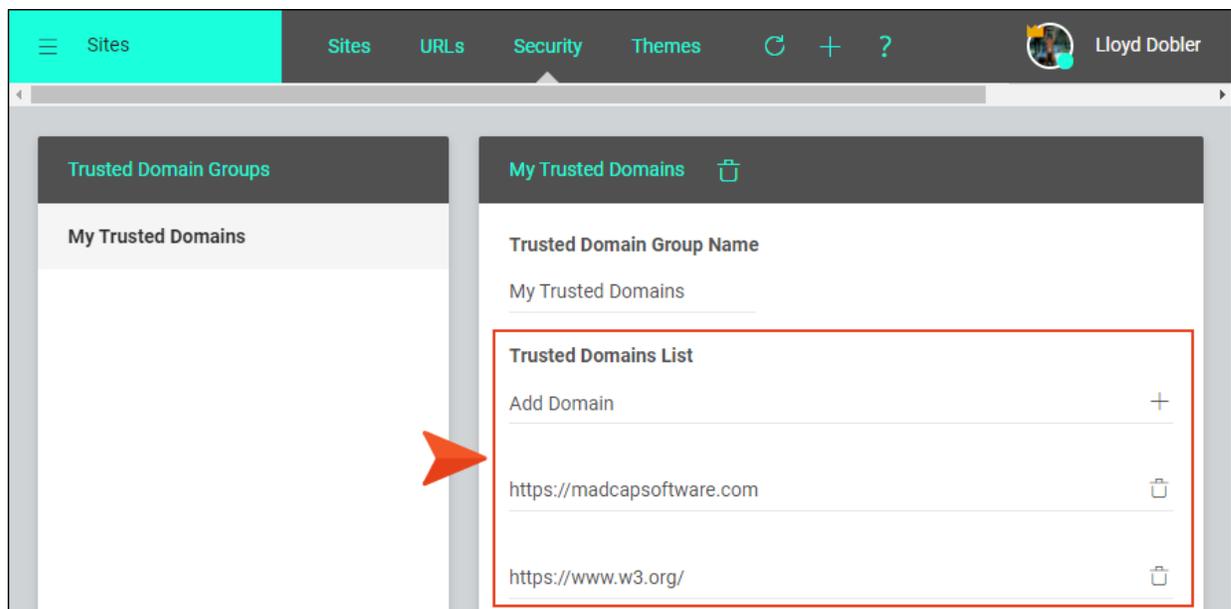
☆ **EXAMPLES**

https:

http:

data:

5. Press **ENTER** or click  to the right.
6. Click **Save**. Any domains that you add are now listed on the right side of the page.



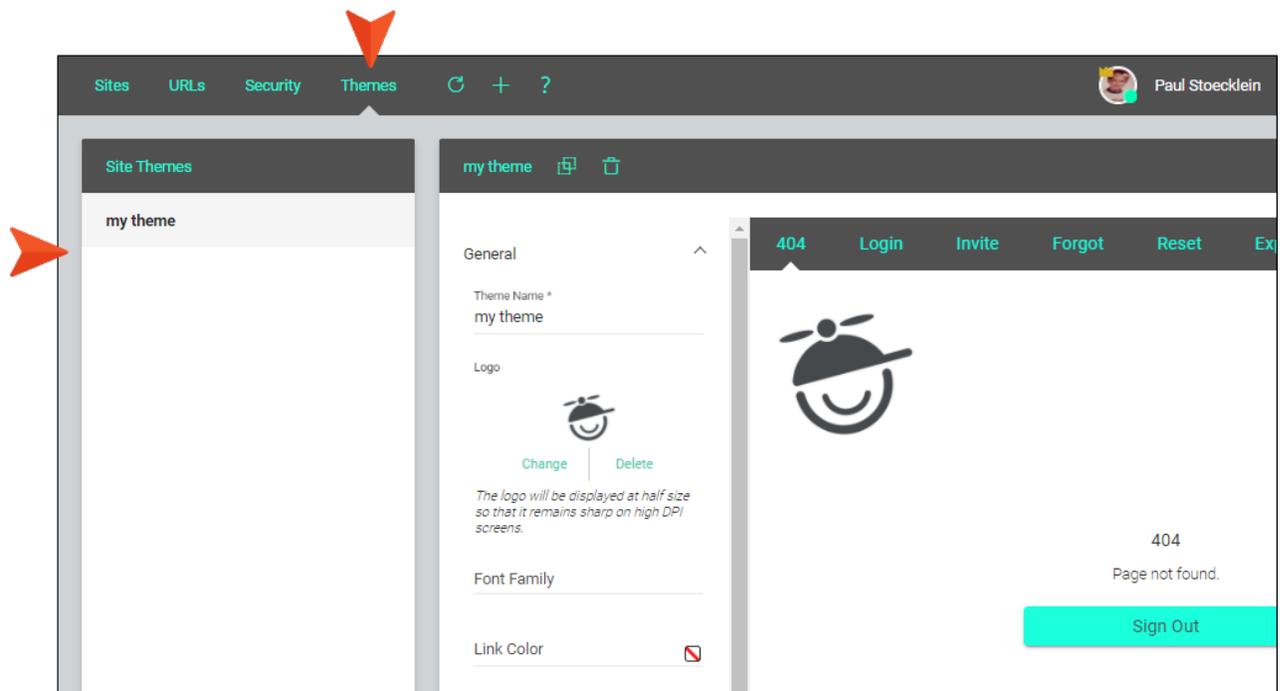
What's Next?

After you create a trusted domain group and add domains to it, you can associate that group with a site, and this will be shown in a column on the Sites page. See "Creating Sites" on page 9 and "Editing Sites" on page 13.

CHAPTER 5

Themes Page View

The Themes page view lets you control how different interface elements look for each site (e.g., 404 pages, login fields). It is possible that you only need one theme for all of your sites, but you can create multiple themes if necessary (e.g., if you have product outputs with different color schemes). If you do not create a theme, the default theme provided by Central will be used.



This chapter discusses the following:

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Creating Themes

You can create a theme if you want to use a different look than the default design for interface elements (e.g., login fields, 404 page).

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Create a Theme

1. On the left side of the interface, click **Sites**.
2. Select the **Themes** tab.
3. In the toolbar click .
4. Enter a name for the theme and click **Save**.
5. Complete the fields on the left, and use the tabs on the right to preview the look for each element. Most of the fields are used to set color, where you click the circle  and use the popup to choose a color. There is also a Gradient Angle option  where you can click and drag a line around a circle to see how a gradient will look when you set a couple of background colors. You can also enter a font family; just make sure you spell the font exactly according to its name on your system. The preview area shows how the element will look with your change.

My theme

General

Theme Name *
My theme

Logo

Change Delete

The logo will be displayed at half size so that it remains sharp on high DPI screens.

Font Family

Link Color

Link Muted Color

Card Colors

Button Colors

Form Colors

Popup Colors

404

Login Invite Forgot Reset Expired Profile No Access

404
Page not found.

Log Out

Preview

Save

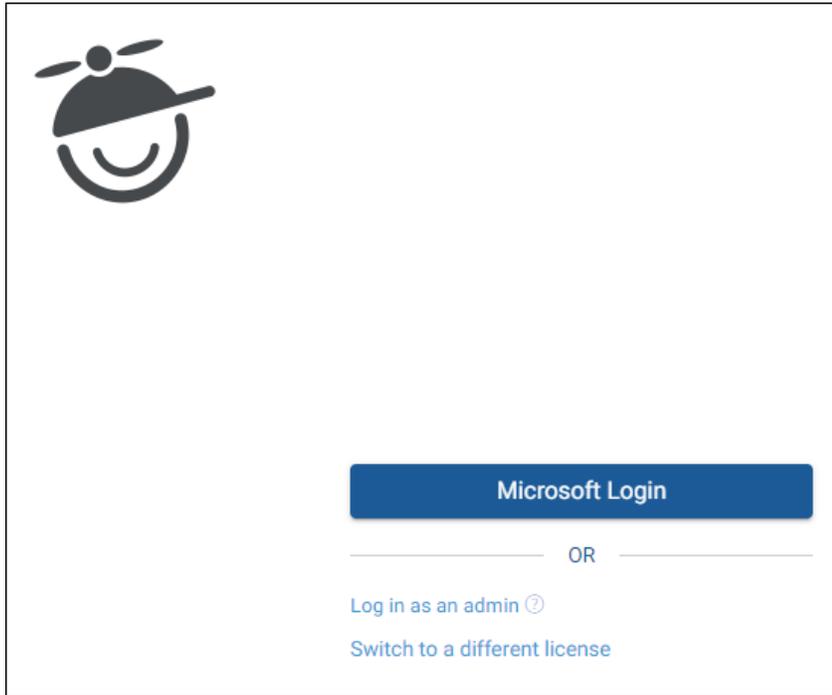
Toggle Popup Toggle Loader

Make changes in these fields.

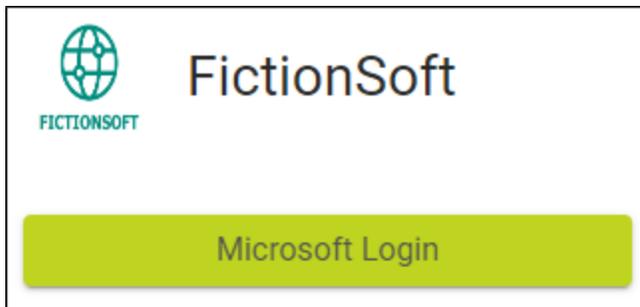
Click each tab to see how that element will be displayed.

 **NOTE** You cannot modify the actual text that is shown on the different theme pages, including the "MadCap ID" text that is shown at times.

 **NOTE** The Logo option can be used to add an image to the upper-left of pages.

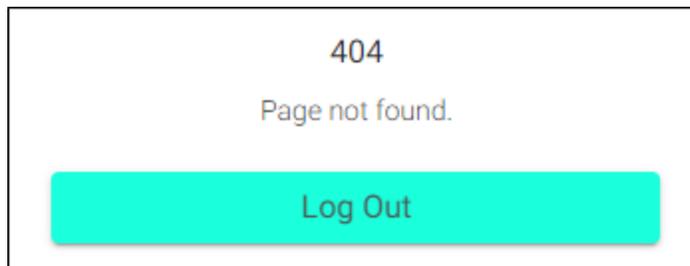


For login pages, the license avatar and name are shown above the login button.

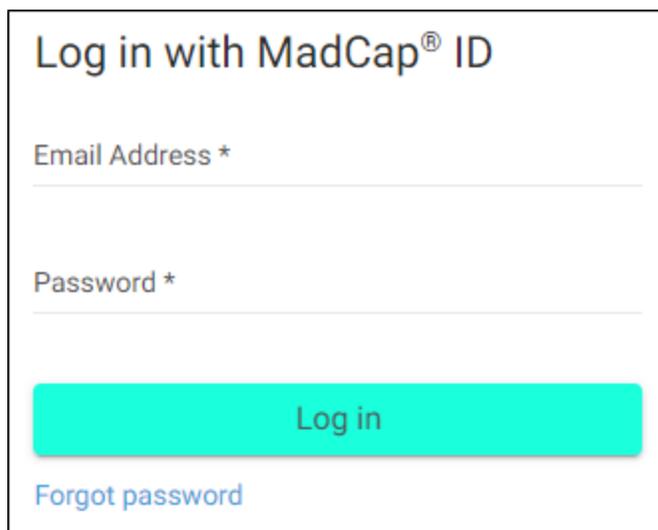


This avatar image is different than the logo image you select for your theme, and it originates from your license settings.

- **404** The text and button that users see when the page cannot be found



- **Login** The login fields users first see when they open the output



- **Invite** The fields users see when completing their invitation and set a password for Central

Create MadCap® ID

First Name *

Last Name *

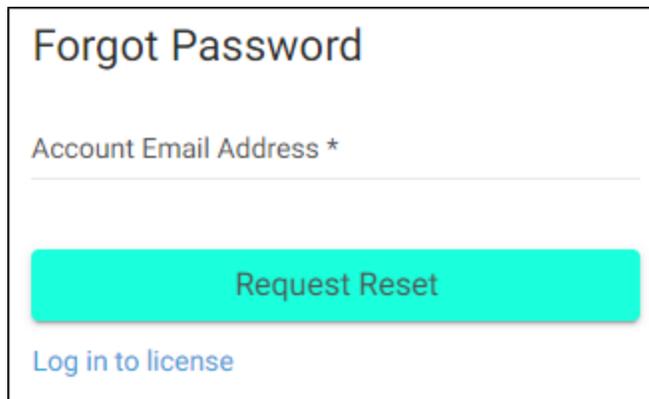
Password *

Confirm Password *

I have read and agree to the [Terms of Use](#)

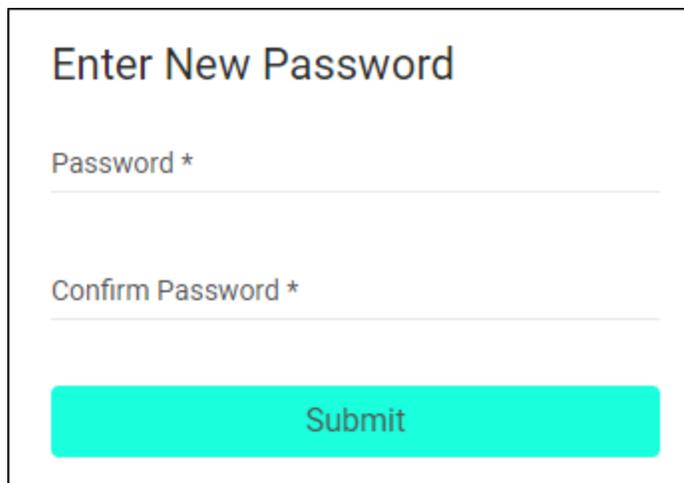
Submit

- **Forgot** The fields users see when requesting a password reset



The screenshot shows a form titled "Forgot Password". It contains a text input field labeled "Account Email Address *". Below the input field is a large red button labeled "Request Reset". At the bottom of the form, there is a blue link labeled "Log in to license".

- **Reset** The fields users see when resetting a password



The screenshot shows a form titled "Enter New Password". It contains two text input fields: "Password *" and "Confirm Password *". Below the input fields is a large red button labeled "Submit".

- **Expired** The fields users see when a password is about to expire

For your security - your password will expire in 2 days.

Create a new password

Email *

Old Password *

New Password *

Confirm New Password *

- **Profile** The fields users see to complete their profile

Profile

Avatar

Change Delete

First Name *
Lloyd

Last Name *
Dobler

Initials (no avatar) *
LD

Title

Phone
(123) 456-7890

Cell Phone
(123) 098-7654

Location
La Jolla, CA

Cancel Save

- **No Access** The message authors and subject matter experts (SMEs) see when they do not have access to the output (e.g., they are not on a team associated with the site), and to request access from an administrator

No Access

Request permission to view this site?

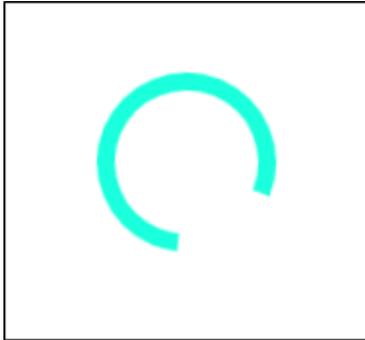
Log Out Send Request

6. You can click the toggle buttons in the lower-right to see how other elements will be displayed. Be sure to click these buttons a second time to hide them from the preview.

- **Toggle Popup** Shows how popups will look for certain events



- **Toggle Loader** Shows a spinning circle, which displays when data is being loaded into the interface



7. (Optional) In the lower-left, you can click  to undo changes to the last saved version of the theme.

8. Click **Save**.

I Editing Themes

You can make changes to a theme that you have created.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Edit a Theme

1. On the left side of the interface, click **Sites**.
2. Select the **Themes** tab.
3. Select the theme name.
4. Complete the fields on the left, and use the tabs on the right to preview the look for each element. For more details, see "Creating Themes" on page 74.
5. Click **Save**.

I Duplicating Themes

You might want to duplicate an existing theme if you want to create a new one that will have some of the same settings.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Duplicate a Theme

1. On the left side of the interface, click **Sites**.
2. Select the **Themes** tab.
3. Select the theme name.
4. In the toolbar click .
5. Enter a name for the new theme.
6. Click **Save**.
7. Make changes to the new theme as necessary, and click **Save** when finished.

I Deleting Themes

If you no longer need a theme that you created, you can delete it.

Permission Required?

For this activity, you must have the following permission setting:



For more information about permissions, see the Central online Help.

How to Delete a Theme

1. On the left side of the interface, click **Sites**.
2. Select the **Themes** tab.
3. Select the theme name.
4. In the toolbar click .
5. Click **Proceed**.

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