

MADCAP FLARE ONLINE

Checklists Guide

Copyright © 2025 MadCap Software. All rights reserved.

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

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

THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

- CHAPTER 1**
 - Introduction 5

- CHAPTER 2**
 - Main Activities for Checklists 8
 - Creating Checklists 9
 - Editing Checklists 33
 - Deleting Checklists 34
 - Setting Notifications for Checklists 35

- CHAPTER 3**
 - Checklist Templates 36
 - Creating Checklist Templates 37
 - Editing Checklist Templates 42
 - Deleting Checklist Templates 43

- CHAPTER 4**
 - Branching in Checklists 44
 - How to Create a Checklist for a Specific Branch 46
 - What’s Noteworthy? 55

APPENDIX

PDFs56

CHAPTER 1

Introduction

You can create checklists to keep track of work related to your projects.

Checklists might have to do with specific files (e.g., topics) in your project. These are called “Project Files” checklists. You can create custom columns for whatever types of activity you want to track for each file, and you can use a note column for specific information about each row. Also, you can associate a Project Files checklist with a specific branch, which is helpful when tracking the progress of content that is in a state of development.

Alternatively, you might create checklists for random things you need to accomplish, such as a product release “To Do” list. These are called “Generic” checklists, and they let you manually name each column and row.

You can set the appropriate status on each item as you work. At the top of the interface you can select to show charts and percentages as you progress through the checklist.

The screenshot shows a web application interface for managing checklists. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Workspace', 'Commits', 'Reports', and 'Translations'. The 'Checklists' section is active, showing a list of checklists on the left and a detailed view of 'My Generic Checklist' on the right.

Callout Boxes:

- Top Left:** In this example, we've selected **Checklists**.
- Top Center:** Click to create a new checklist – generic or based on project files.
- Top Right:** Click to create and manage templates, which are useful if you create lots of checklists that contain the same rows or columns.
- Right Side (Top):** This area shows charts and data related to the progress of your checklist.
- Right Side (Middle):** Click to show/hide charts for the checklist.
- Right Side (Bottom):** Click arrow for different types of charts (i.e., total % complete, checklist item % complete, and checklist completion table).
- Left Side (Middle):** Checklists are listed here.
- Left Side (Bottom):** Use this area to work with an open checklist.
- Bottom Left:** Statuses – To Do, In Progress, Complete, N/A
- Center (Top):** Click here to edit the checklist.

Main Content:

Checklists List:

- My Generic Checklist 33.3%
- My Project Files Checklist 0%

My Generic Checklist View:

Total % Complete: 33% Complete

- 50% In Progress
- 17% To Do

Items Table:

Items	Mike	Sally	Note
Research	✓	✓	Click to add a note
Fix bugs	🔄	🔄	Click to add a note
Run reports	🟡	🔄	Click to add a note

Main Activities

- "Creating Checklists" on page 9
- "Editing Checklists" on page 33
- "Deleting Checklists" on page 34
- "Setting Notifications for Checklists" on page 35

Checklist Templates

- "Creating Checklist Templates" on page 37
- "Editing Checklist Templates" on page 42
- "Deleting Checklist Templates" on page 43

Branching

- "Branching in Checklists" on page 44

CHAPTER 2

Main Activities for Checklists

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

This chapter discusses the following:

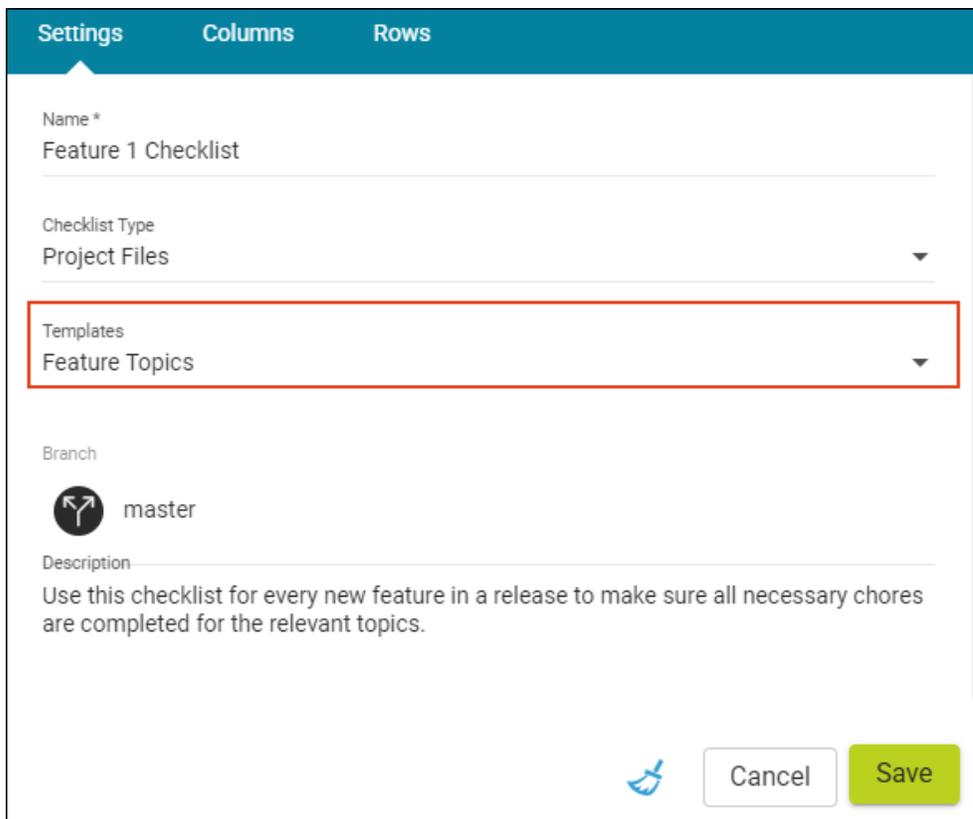
- Creating Checklists 9
- Editing Checklists33
- Deleting Checklists34
- Setting Notifications for Checklists35

Creating Checklists

You can create checklists to keep track of work related to your projects.

How to Create a Checklist

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click . The Create Checklist dialog opens.
4. (Optional) If you have previously created a checklist template, you can click the **Templates** field and choose it (see "Creating Checklist Templates" on page 37). Information from the template (e.g., type, description, columns) will populate corresponding fields. After the fields are populated, you can edit them if necessary.



The screenshot shows the 'Create Checklist' dialog box with the following fields and options:

- Settings** | Columns | Rows
- Name ***: Feature 1 Checklist
- Checklist Type**: Project Files
- Templates**: Feature Topics (highlighted with a red box)
- Branch**:  master
- Description**: Use this checklist for every new feature in a release to make sure all necessary chores are completed for the relevant topics.
- Buttons:  Cancel Save

5. Complete the **Name** field.

Settings Columns Rows

Name *
Feature 1 Checklist

Checklist Type
Project Files

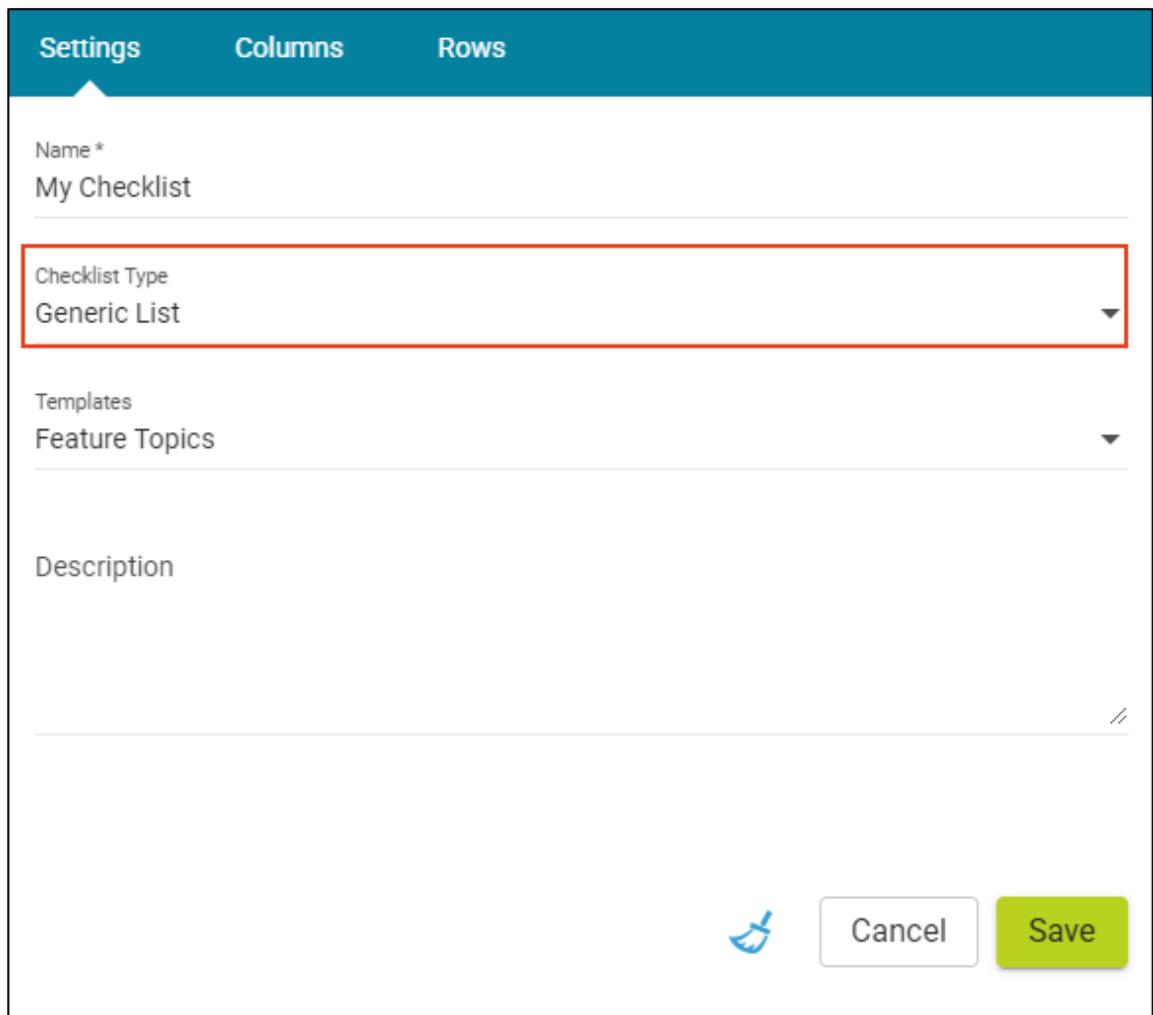
Templates
Feature Topics

Branch
 master

Description
Use this checklist for every new feature in a release to make sure all necessary chores are completed for the relevant topics.

 Cancel Save

6. From the **Checklist Type** field, you can select a generic or project files checklist type.
- **Generic List** This lets you add a checklist where each row is manually created. The checklist can pertain to anything you want.



The screenshot shows a configuration form with a teal header containing three tabs: 'Settings', 'Columns', and 'Rows'. The 'Settings' tab is active. The form contains the following fields:

- Name ***: A text input field containing 'My Checklist'.
- Checklist Type**: A dropdown menu with 'Generic List' selected. This field is highlighted with a red rectangular border.
- Templates**: A dropdown menu with 'Feature Topics' selected.
- Description**: A large text area for entering a description, currently empty.

At the bottom right of the form, there is a blue trash icon, a 'Cancel' button, and a green 'Save' button.

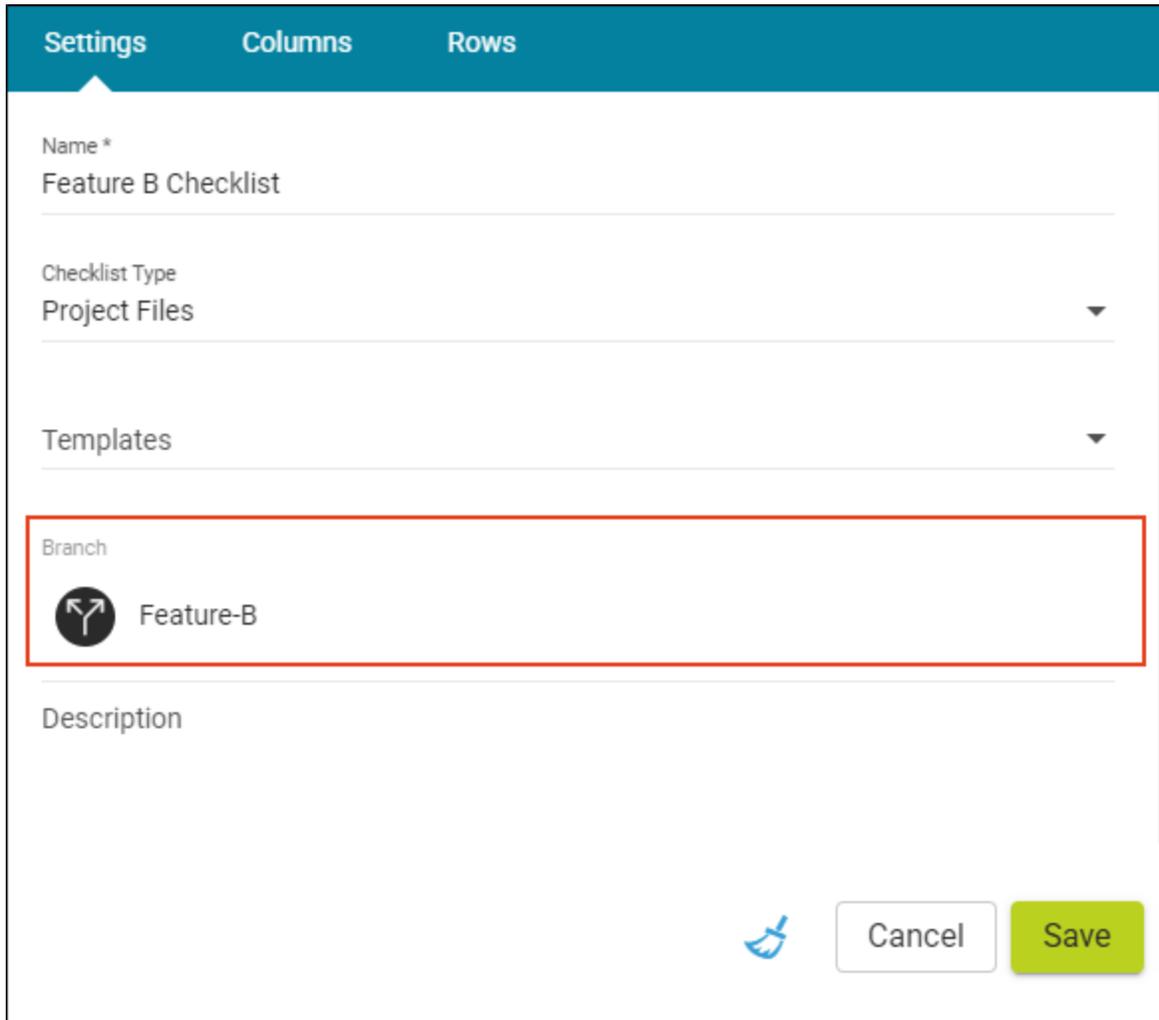
- **Project Files** This lets you add a checklist where the rows are based on files from your project. Most commonly, these kinds of checklists will be used to track the progress of topics as you edit them, but if you like, you can create checklists that include any other kinds of files from the project (e.g., template pages, images, TOCs, targets, skins).

The screenshot shows a configuration window with a teal header containing three tabs: 'Settings', 'Columns', and 'Rows'. The 'Settings' tab is active. Below the header, there are several input fields:

- Name ***: A text field containing 'Feature 1 Checklist'.
- Checklist Type**: A dropdown menu with 'Project Files' selected. This field is highlighted with a red rectangular border.
- Templates**: A dropdown menu.
- Branch**: A section with a circular icon containing a fork symbol and the text 'master'.
- Description**: A large empty text area.

At the bottom right of the form, there is a blue brush icon, a 'Cancel' button, and a green 'Save' button.

- (Optional) If you are creating a "Project Files" type of checklist and using branching (which is highly recommended), click the **Branch** field. Then, select the name of the branch to be associated with the checklist. See "Branching in Checklists" on page 44.



The image shows a settings form for a checklist. At the top, there are three tabs: "Settings" (selected), "Columns", and "Rows". The form contains the following fields:

- Name ***: Feature B Checklist
- Checklist Type**: Project Files (dropdown menu)
- Templates**: (dropdown menu)
- Branch**: Feature-B (highlighted with a red box, accompanied by a branch icon)
- Description**: (empty text area)

At the bottom right, there are three buttons: a blue icon, a "Cancel" button, and a green "Save" button.

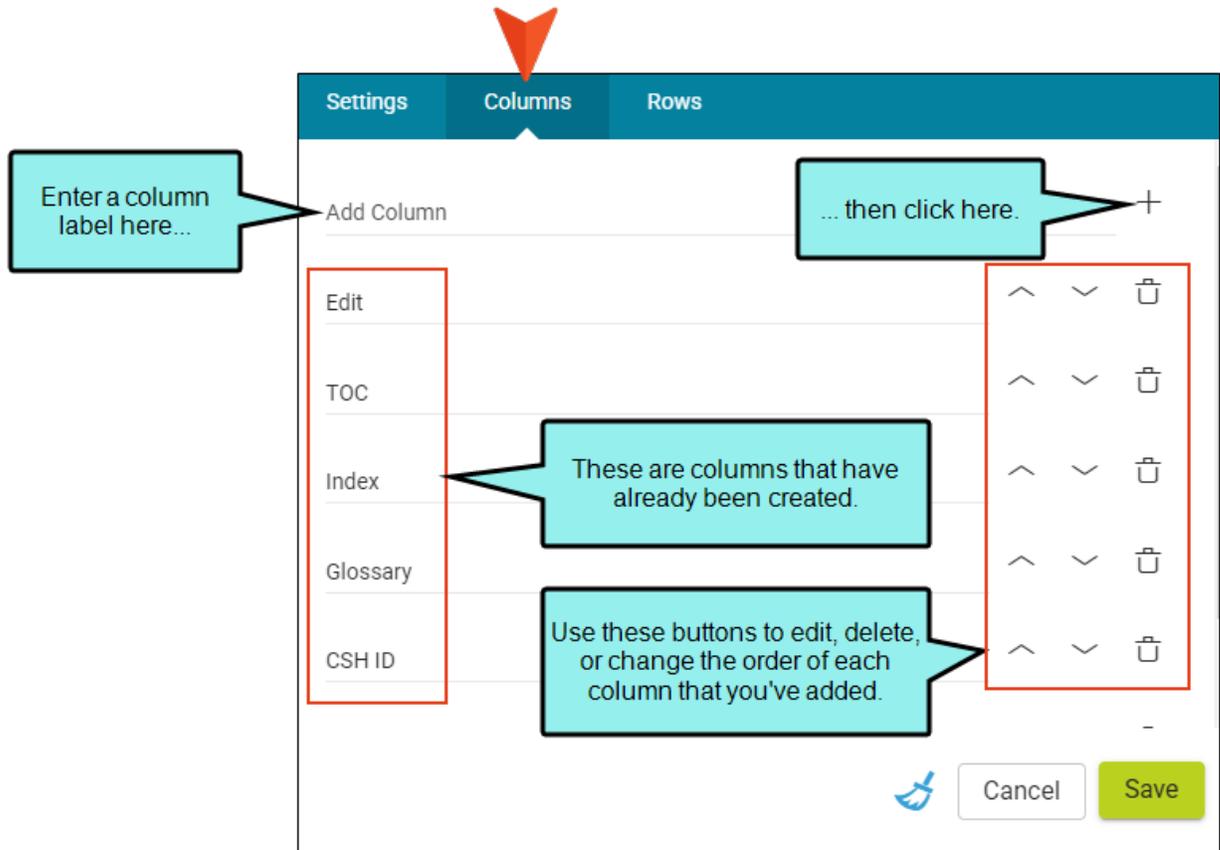
8. (Optional) You can complete the **Description** field if you want a more detailed explanation of the checklist for yourself and other writers on your team.

The screenshot shows a settings form for a checklist. At the top, there are three tabs: "Settings" (selected), "Columns", and "Rows". The form contains the following fields:

- Name ***: Feature 1 Checklist
- Checklist Type**: Project Files (dropdown menu)
- Templates**: Feature Topics (dropdown menu)
- Branch**: Feature-B (with a circular icon containing a branching symbol)
- Description**: Use this checklist for every new feature in a release to make sure all necessary chores are completed for the relevant topics. (This field is highlighted with a red border)

At the bottom right of the form, there is a blue trash can icon, a "Cancel" button, and a green "Save" button.

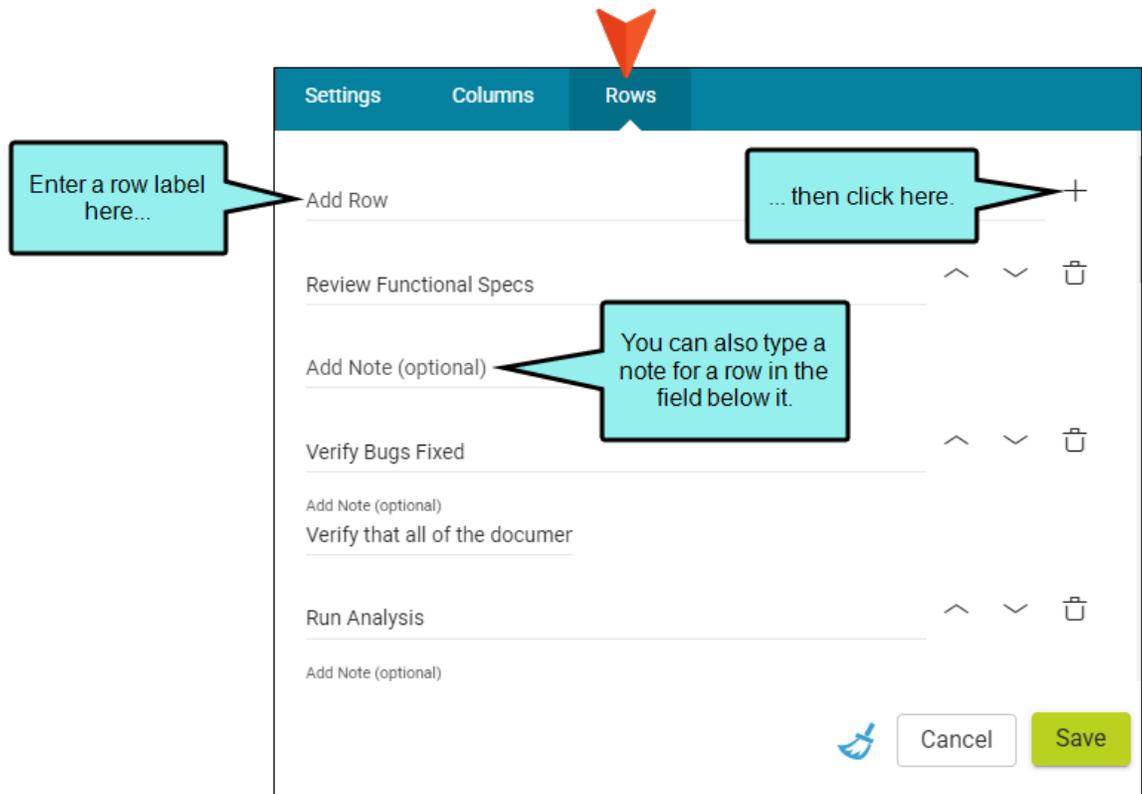
9. Select the **Columns** tab. Create columns by typing a label in the text box and pressing **ENTER** or clicking . Repeat this for each column you want to add. You can use the up and down arrows to change the order of the columns (the column at the top of the dialog will appear at the top of the checklist, and the column at the bottom will appear at the far right).



10. Select the **Rows** tab to create rows for the checklist. This is done differently, depending on the type of checklist you are creating.

- **Generic List** In the text box, type the label for a row and click . Repeat this for each row you want to add. You can use the up and down arrows to change the order of the rows.

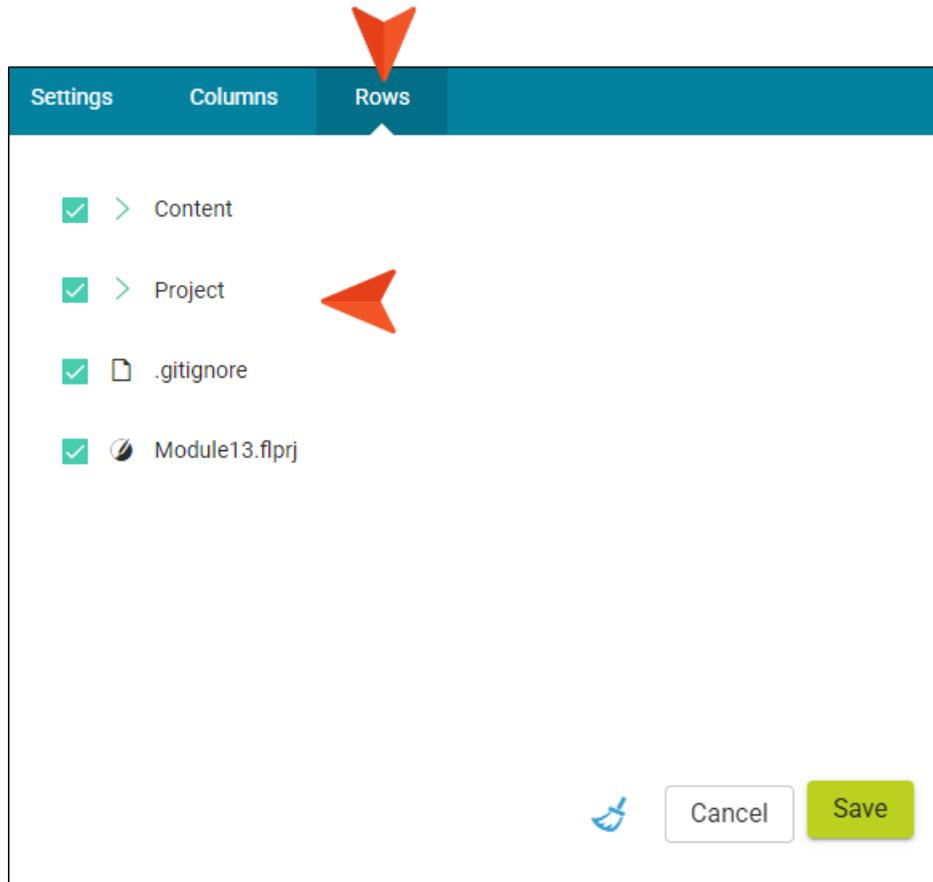
You can also complete the **Add Note** field for any row.



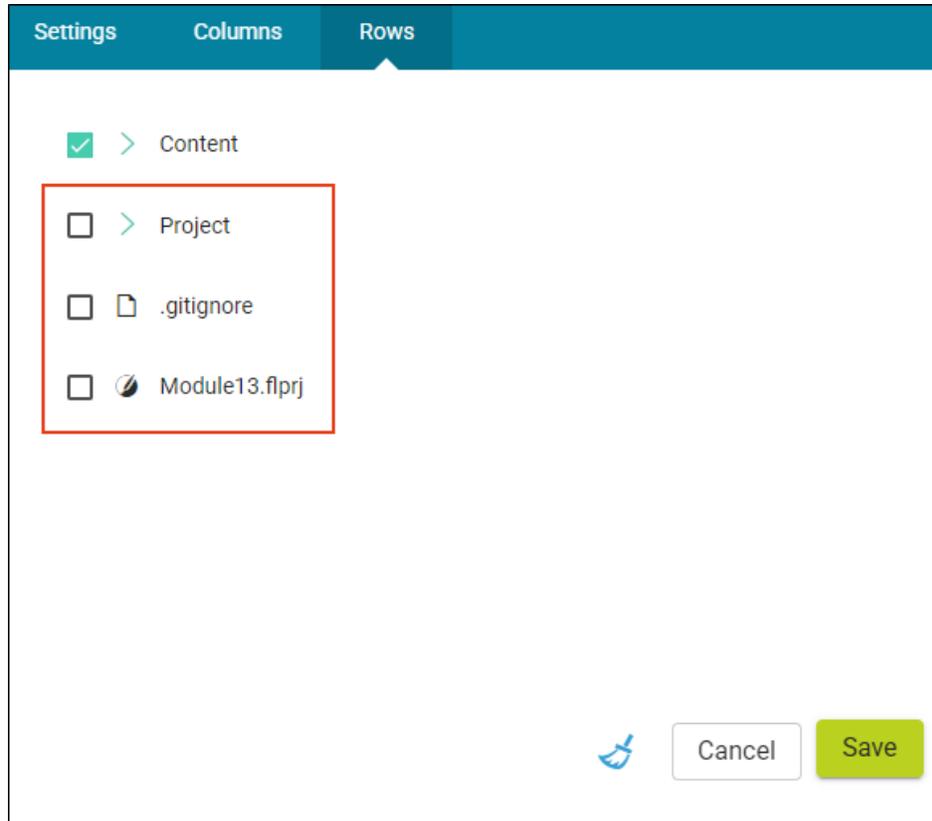
- **Project Files** Your project folders and files are shown on the Rows tab, with check boxes next to each item. Any item with a check mark will be included in the checklist. It is likely that you will only want to include certain files in the checklist. Therefore, remove the check marks for any files you want to exclude. If you want to include a small number of items in a folder, the easiest thing to do is to begin by removing the check mark from the folder. Then navigate to the items you want to include and select them.

☆ **EXAMPLE** You have a project where the Content folder contains topics you want to create a checklist..

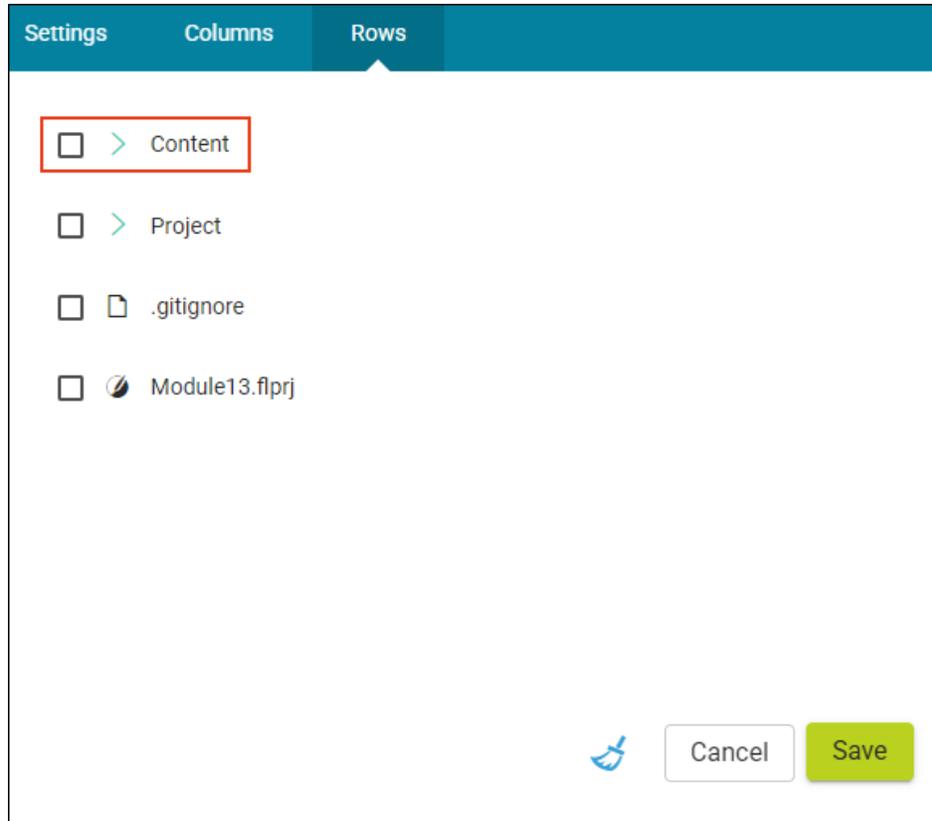
When you create the checklist, you will see the following on the Rows tab:



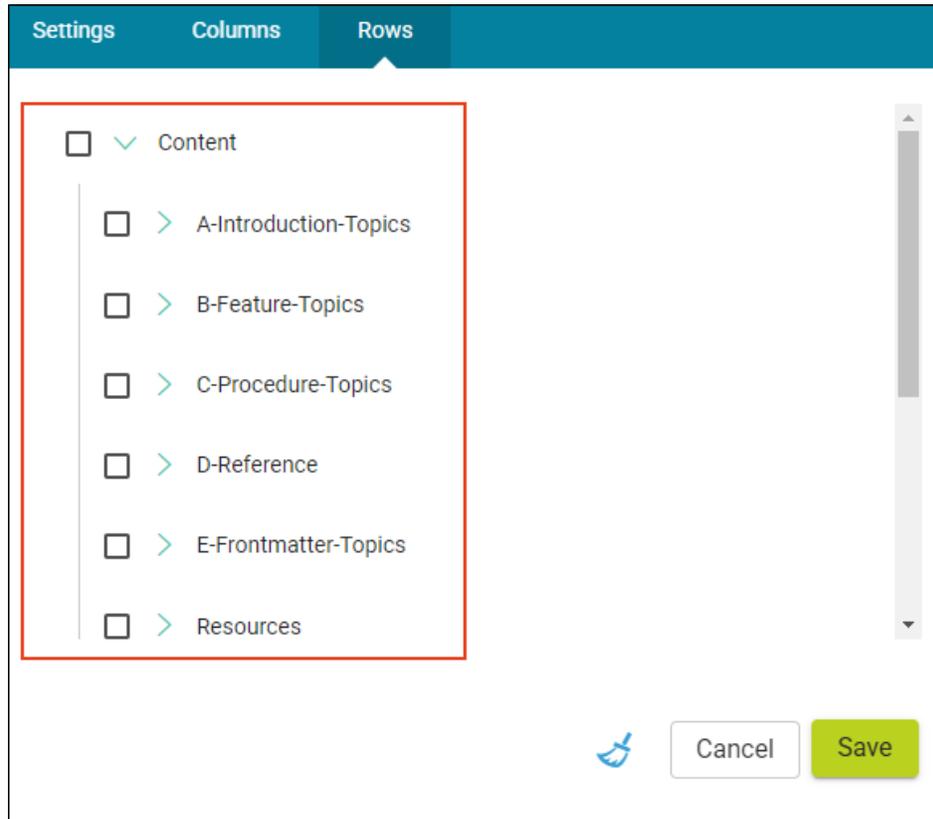
- ☆ You don't want any of the files from the Project folder to be part of the checklist, and you don't want the .gitignore or main project file included either. So you can remove those check marks.



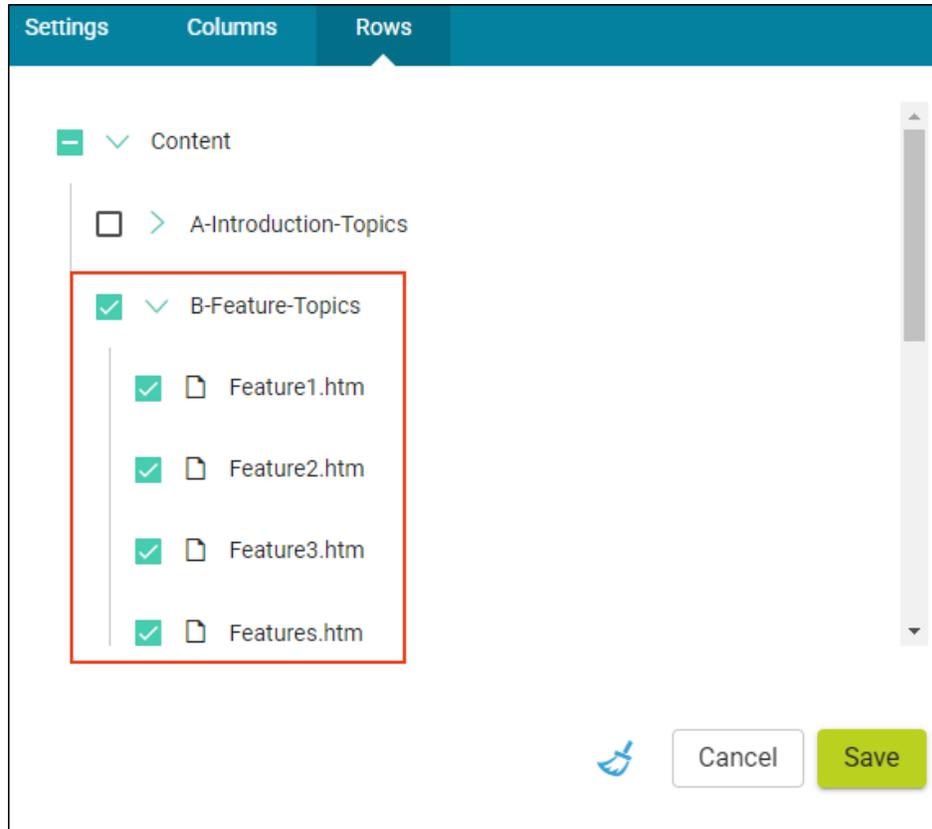
- ☆ The files to be included in the checklist are topics, which are found in the Content folder. However, most of the topics and other files from the Content folder will not be part of the checklist. So the easiest thing is to initially remove the check mark from that folder as well.



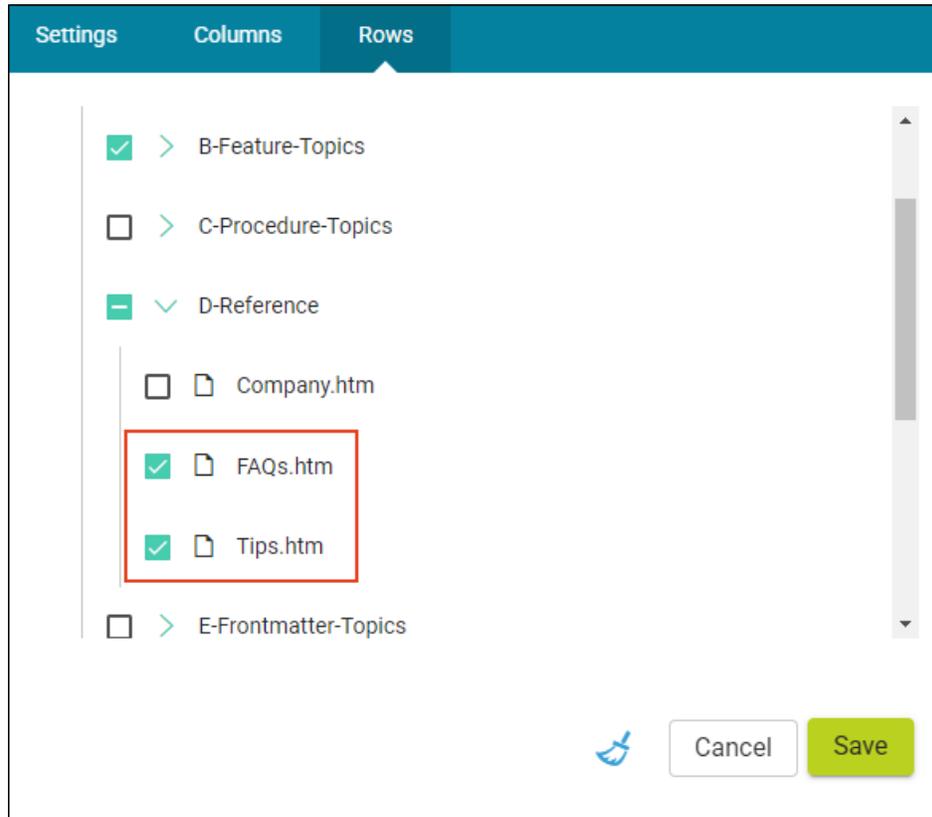
☆ To choose specific topics in the Content folder, click the arrow to the left to expand it. You will see all of the subfolders and files within it.



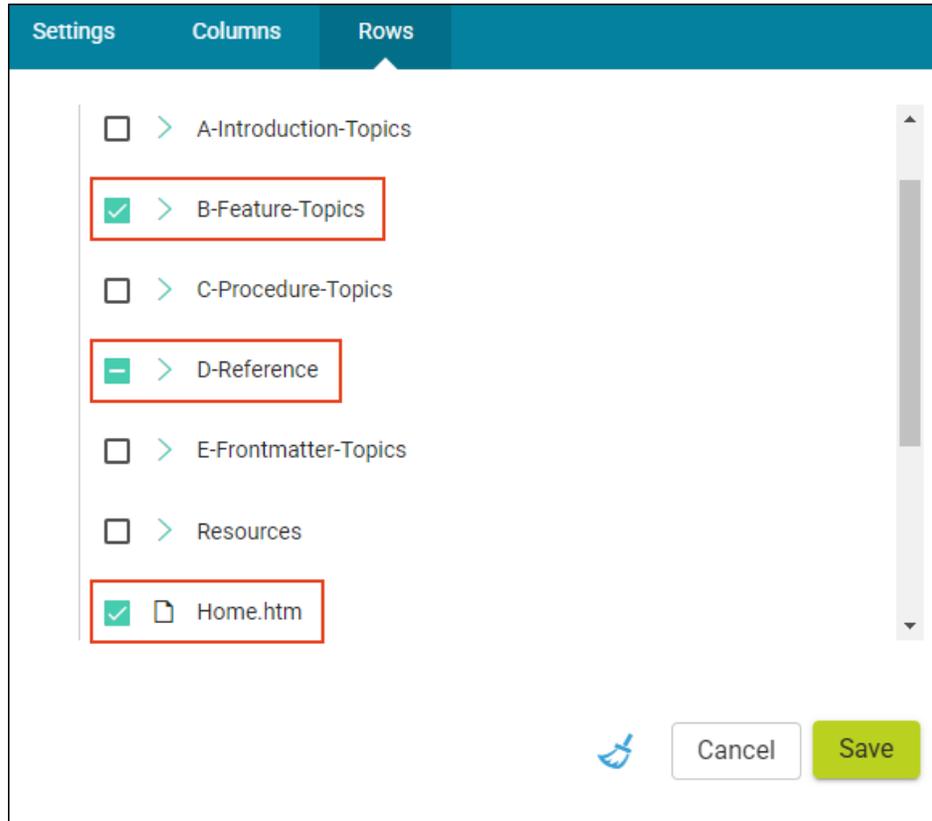
- ☆ Since you want all of the topics in “B-Feature-Topics” to be included, you can just click the check box next to that subfolder. If you expand that subfolder, you will see that all of the topics within it are automatically selected.



- ☆ You only want two of the topics in the “D-Reference” subfolder to be included, so expand that folder and select those topics.

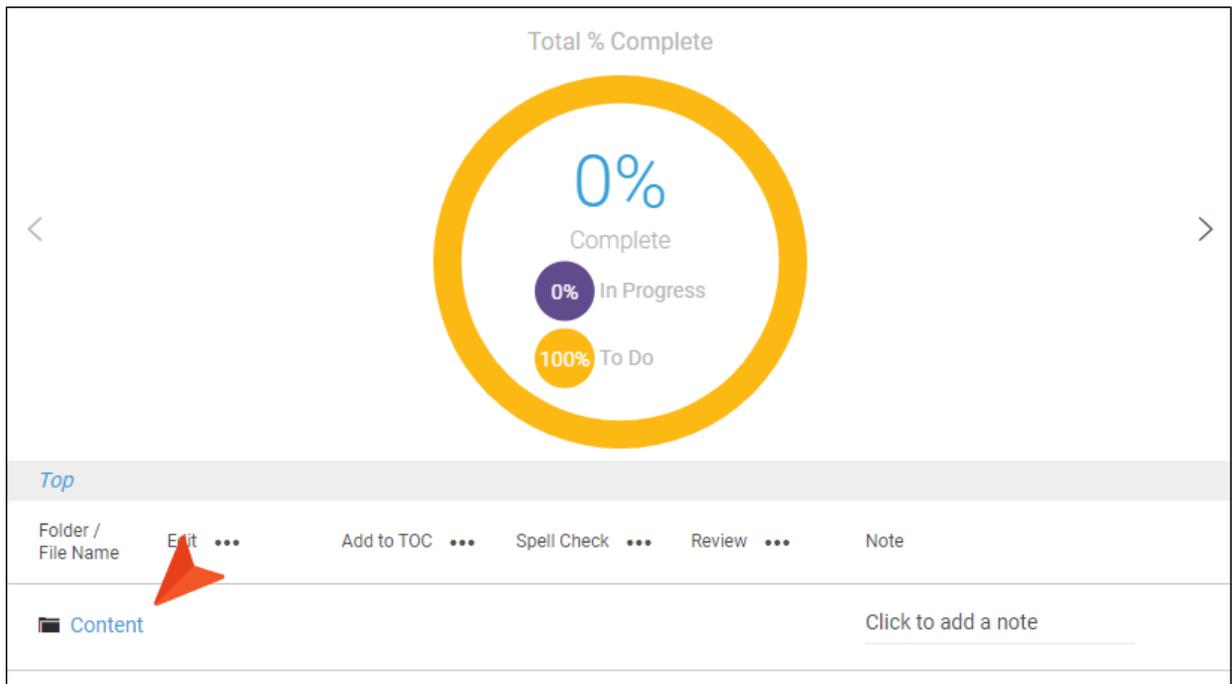


- ☆ And finally, you want the Home topic at the root level of the Content folder to be included, so select it. The dialog should now look as follows when all subfolders are collapsed. Notice that the “D-Reference” subfolder has a small dash instead of a check mark; that’s because only some of the topics within it are selected.

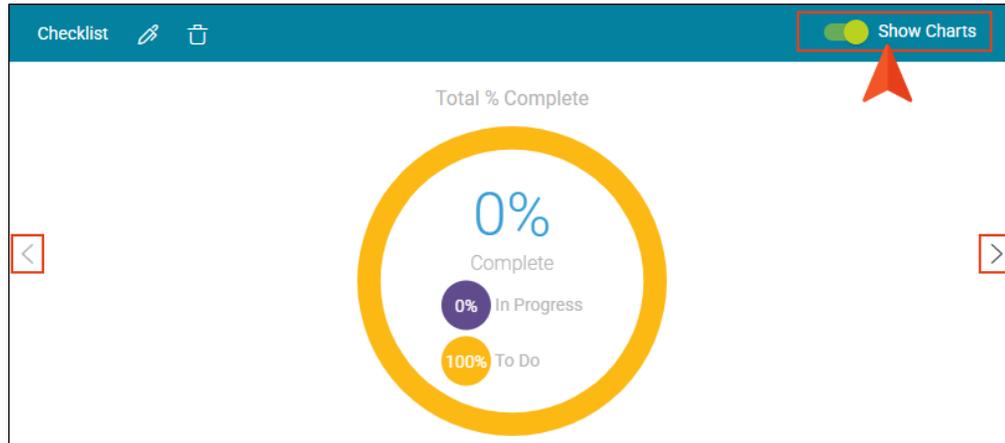


11. Click **Save**. The checklist is created and its name appears on the left side of the interface. The checklist graph and items appear to the right.

12. If you have created a checklist based on project files, you will see the first folder level (e.g., Content).



 **NOTE** Since the Show Charts option is selected by default, the first folder level will display below the checklist graph. With Show Charts activated, you can click the arrow on the side of the current chart to see a different chart (e.g., Total % Complete, Checklist Item % Complete, and Checklist Completion Table). You can hide the visual display by clicking the Show Charts option.



To navigate to a particular subfolder or set of files, click that folder. You will then see the content within that folder, as well as a breadcrumbs trail.

The screenshot displays a checklist application interface. At the top, there is a teal header with the text "Checklist" and icons for editing and deleting. A toggle switch labeled "Show Charts" is on the right. The main content area features a large yellow circular progress indicator titled "Total % Complete" showing 0% complete. Below the progress indicator, there are three smaller circles: a purple one for "0% In Progress" and a yellow one for "100% To Do". A light blue callout box labeled "Breadcrumbs" points to a breadcrumb trail "Top / Content" which is highlighted with a red box. Below the breadcrumb trail is a table listing folders and files:

Folder / File Name	Edit	Add to TOC	Spell Check	Review	Note
B-Feature-T...					Click to add a note
D-Reference					Click to add a note
Home.htm					Click to add a note

When you open a folder that contains files, you will see a circle for each column. These circles are where you set the status of each item.

Top / Content / B-Feature-Topics					
Folder / File Name	Edit ...	Add to TOC ...	Spell Check ...	Review ...	Note
📄 Feature1.htm	○ ▾	○ ▾	○ ▾	○ ▾	Click to add a note
📄 Feature2.htm	○ ▾	○ ▾	○ ▾	○ ▾	Click to add a note
📄 Feature3.htm	○ ▾	○ ▾	○ ▾	○ ▾	Click to add a note
📄 Features.htm	○ ▾	○ ▾	○ ▾	○ ▾	Click to add a note

 **NOTE** You will not see the status circles for rows represented by folders. You can set the status for files only.

Top / Content					
Folder / File Name	Edit ...	Add to TOC ...	Spell Check ...	Review ...	Note
📁 B-Feature-Topics					Click to add a note
📁 D-Reference					Click to add a note
📄 Home.htm	○ ▾	○ ▾	○ ▾	○ ▾	Click to add a note

If you want to navigate back to a particular folder or subfolder, click it in the breadcrumbs.

To go back to the main Content folder, click here.

Top / Content / B-Feature-Topics					
Folder / File Name	Edit ...	Add to TOC ...	Spell Check ...	Review ...	Note
Feature1.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Feature2.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Feature3.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Features.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note

13. Click a circle and it will cycle through all the statuses each time you click. Alternatively, you can click the down arrow next to the circle and choose one of the statuses from the context menu.

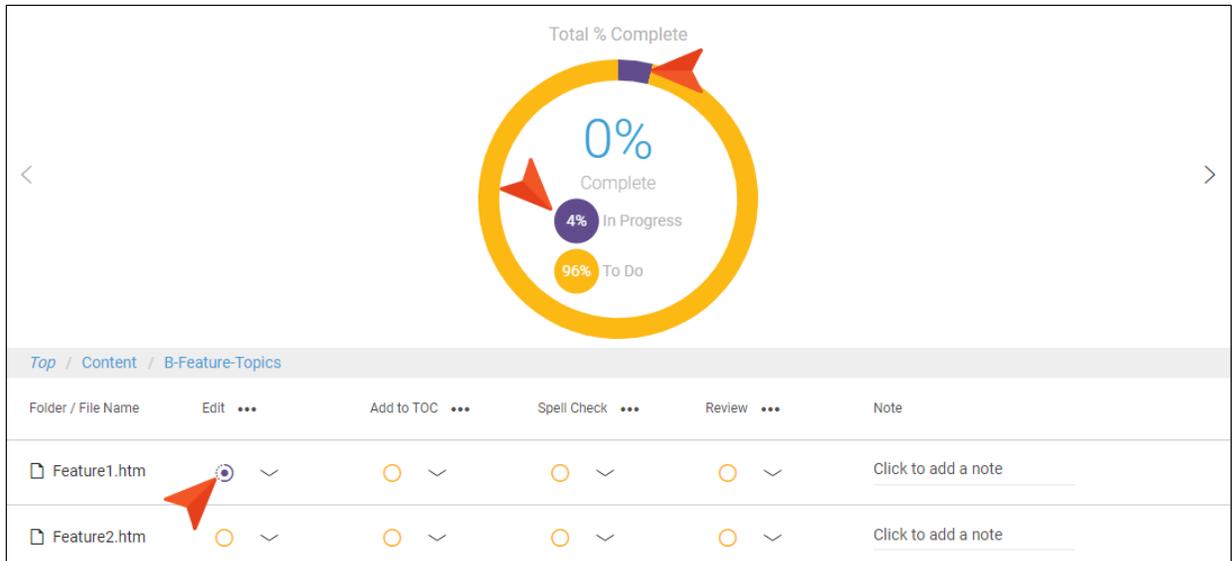
- To Do
- In Progress
- Complete
- N/A Select this status if a particular column is not applicable for that row.

Top / Content / B-Feature-Topics					
Folder / File Name	Edit ...	Add to TOC ...	Spell Check ...	Review ...	Note
Feature1.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Feature2.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Feature3.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note
Features.htm	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	<input type="radio"/> ▾	Click to add a note

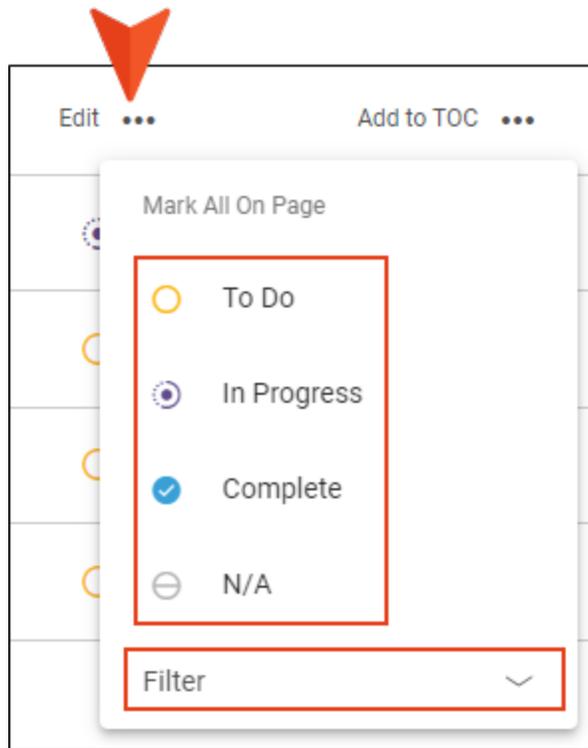
Change Status

- To Do
- In Progress
- Complete
- N/A

Depending on your selection, the appearance of the circle changes, and the graph is updated.



- ✔ **TIP** You can click the ellipsis in a column heading to set all of the items in that column to the same status.

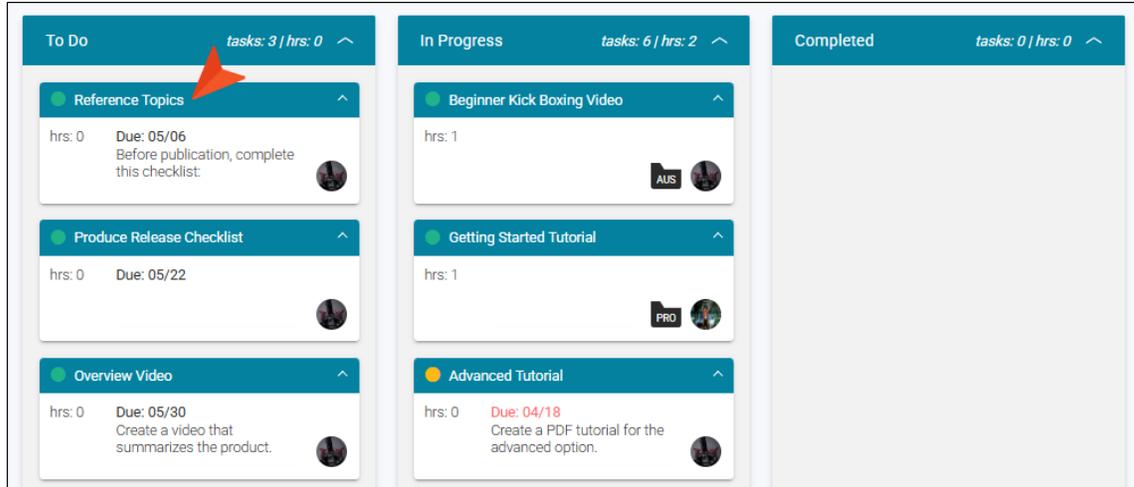


You can also click the Filter drop-down in the context menu to either select to filter only on a specific status, or clear a status type from the checklist.

14. (Optional) If you want to add a comment for a particular row, you can click in the **Note** cell and type it.

✔ **TIP** Although there is not currently any software integration between project checklists and tasks, you might find it helpful to create your own associations between the two as part of your overall workflow.

Let's say you have created a task to write a particular group of reference topics.



- ✓ When creating or editing this task, instead of listing all of the things you need to do, you can paste a copy of the checklist URL in your task description and create a link to it.

Reference Topics Move

● Low Priority Start: 1/20/2022 12:00 AM

Status: To Do Due: 2/25/2022 11:59 PM

📄(0) 📎(0) 52 hrs 4 pos All Day Event

Task Board: Default Board

Owner: Lloyd Dobler

Assigned: Jeff Lebowski

Description:

Before publication, complete this checklist: <https://madcloudportal-env-qa-azurewebsites.net/#/125/projects/7691/checklists/533>

You can select the URL path and use this button to create a link to it.

Once you finish the checklist, you can return to the Tasks page to move the task card to the Completed milestone.

I Editing Checklists

After creating a checklist, you can edit it to make changes or additions.

How to Edit a Checklist

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. On the left side of the page, select the checklist you want to edit. The checklist grid and chart are displayed to the right.
4. In the toolbar click .
5. You can use the Settings tab to change the name, type, branch, or description of the checklist. You can use the other tabs to make any row or column changes for the checklist. For more details about each option, see "Creating Checklists" on page 9.
6. (Optional) You can click **Save as Template**, which will make the checklist content available when you create other checklists in the future. See "Creating Checklist Templates" on page 37.
7. When you are finished, click **Save**.

I Deleting Checklists

Checklists can be deleted from the project.

How to Delete a Checklist

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. On the left side of the page, select the checklist you want to delete.
4. In the toolbar click .
5. In the dialog that opens, type the name of the checklist in the field and click **Delete**.

Setting Notifications for Checklists

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 Help system.

Eddie Vanetti
Vanetti@ahem.madcapsoftware.com

Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete

Notifications

Send notifications by
 Notification Center Email

Send notifications when

- Builds
- Checklists
 - Checklist Created
 - Checklist Deleted
 - Checklist Updated
- Licenses
- Projects
- Reports
- Reviews
- Sites
- Tasks
- Teams
- Translation
- Users

Cancel Save

CHAPTER 3

Checklist Templates

To be more productive, you can create and use templates when working with checklists.

This chapter discusses the following:

Creating Checklist Templates	37
Editing Checklist Templates	42
Deleting Checklist Templates	43

Creating Checklist Templates

You can create checklist templates to save time when adding new checklists. When you create a new checklist, you can base it on any of your saved templates. This is quite useful when you are creating many checklists that share the same type, description, columns, rows, or notes. Rather than typing all the information manually, the template populates the relevant fields automatically.

Checklist templates are available across all projects that you upload to Flare Online.

☆ **EXAMPLE** You have a product release "To Do" checklist that you use every time you publish updated documentation for each of your company's products. The checklist has just one column to indicate whether a particular task has been completed. However, there are about a dozen rows listing things you need to accomplish as part of the product release. Also, some of the rows have detailed notes that provide more explanation of what needs to be done.

Items	Complete	...	Note
 Research	<input type="radio"/>	∨	Click to add a note
 Review Functional Specs	<input type="radio"/>	∨	Click to add a note
 Verify Fix Bugs	<input type="radio"/>	∨	Finish assigned doc bugs.
 Run Annotation Report	<input type="radio"/>	∨	Click to add a note
 Run Analysis	<input type="radio"/>	∨	Scan for critical issues.
 Search Output &Test	<input type="radio"/>	∨	Click to add a note
 Check Troubleshooting Top...	<input type="radio"/>	∨	Click to add a note
 Replace Images	<input type="radio"/>	∨	Click to add a note

☆ If you were to completely re-create that checklist from scratch each time you had a product release, you would spend a lot of time typing (or copying and pasting) the same information repeatedly. Therefore, you create a template that includes the necessary checklist type, description, columns, rows, and notes.

The screenshot displays a configuration window for a checklist template. On the left, a teal sidebar shows the template name 'Product Release'. The main window is titled 'Settings' and includes sub-sections for 'Columns' and 'Rows'. The 'Settings' section contains the following fields:

- Name:** Product Release To Do
- Checklist Type:** Generic List (with a dropdown arrow)
- Description:** Use this checklist for every product release to make sure all of the necessary chores are completed in order.

At the bottom of the window, there are three buttons: 'Save', 'Cancel', and 'Save and Close'.

☆ Then, whenever you need to create a new product release checklist, you select your template.

The screenshot shows a settings form with a teal header containing three tabs: 'Settings', 'Columns', and 'Rows'. The 'Settings' tab is active. The form contains the following fields:

- Name:** Product Release To Do
- Checklist Type:** Generic List (with a dropdown arrow)
- Templates:** Product Release To Do (with a dropdown arrow and a red rectangular highlight around the entire section)
- Description:** Use this checklist for every product release to make sure all of the necessary chores are completed in order.

At the bottom right of the form, there is a double-slash icon (//).

How to Create a Checklist Template

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. Complete the **Name** field.
5. From the **Checklist Type** field, you can select a project files or generic checklist type.
 - **Project Files** This lets you add a checklist where the rows are based on files from your project. Most commonly, these kinds of checklists will be used to track the progress of topics as you edit them, but if you like, you can create checklists that include any other kinds of files from the project (e.g., template pages, images, TOCs, targets, skins).
 - **Generic List** This lets you add a checklist where each row is manually created. The checklist can pertain to anything you want.
6. (Optional) You can complete the **Description** field if you want a more detailed explanation of the checklist for yourself and other writers on your team.
7. Select the **Columns** tab. Create columns by typing a label in the text box and pressing **ENTER** or clicking . Repeat this for each column you want to add. You can use the up and down arrows to change the order of the columns (the column at the top of the dialog will appear at the far left in the checklist, and the column at the bottom will appear at the far right).
8. If you selected **Generic List**, complete the **Rows** tab in the same way that you created the columns. The only difference is that you can also complete an **Add Note** field for each row.

 **NOTE** The Rows tab is not available if you selected Project Files. That's because the files will be different with each project where you might be using the project checklist.

9. Click either **Save** (to save the template and keep the dialog open) or **Save and Close** (to save the template and close the dialog). The template name appears on the left side of the interface. It will also now be available in the Create Checklist dialog.

How to Save an Existing Checklist as a Template

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. On the left side of the page, select the checklist you want to save as a template. The checklist grid and chart are displayed to the right.
4. In the toolbar click . The Edit Checklist dialog opens.
5. If necessary, make any changes to the checklist that you want. For more details about each option, see "Creating Checklists" on page 9.
6. Click **Save as Template**.

Other Template Options

When working in the Template Manager, there are a few more things you can do.

Option	Description
	Lets you create a new template
	Deletes the selected template
	Clears all fields in the dialog

I Editing Checklist Templates

After creating a checklist template, you can edit it to make changes or additions. Keep in mind that existing checklists that were previously created based on the template will not be changed as a result of the template edits.

How to Edit a Checklist Template

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. On the left side of the dialog, select the checklist template you want to edit. The fields are populated to the right.
5. Use the tabs and fields to make any changes that you want. For more details about each option, see "Creating Checklists" on page 9.
6. Click either **Save** (to save the template and keep the dialog open) or **Save and Close** (to save the template and close the dialog).

I Deleting Checklist Templates

Checklists templates can be deleted, in which case they will no longer be available for selection when creating new checklists. Keep in mind that existing checklists that were previously created based on the template will not be affected as a result of the template deletion.

How to Delete a Checklist Template

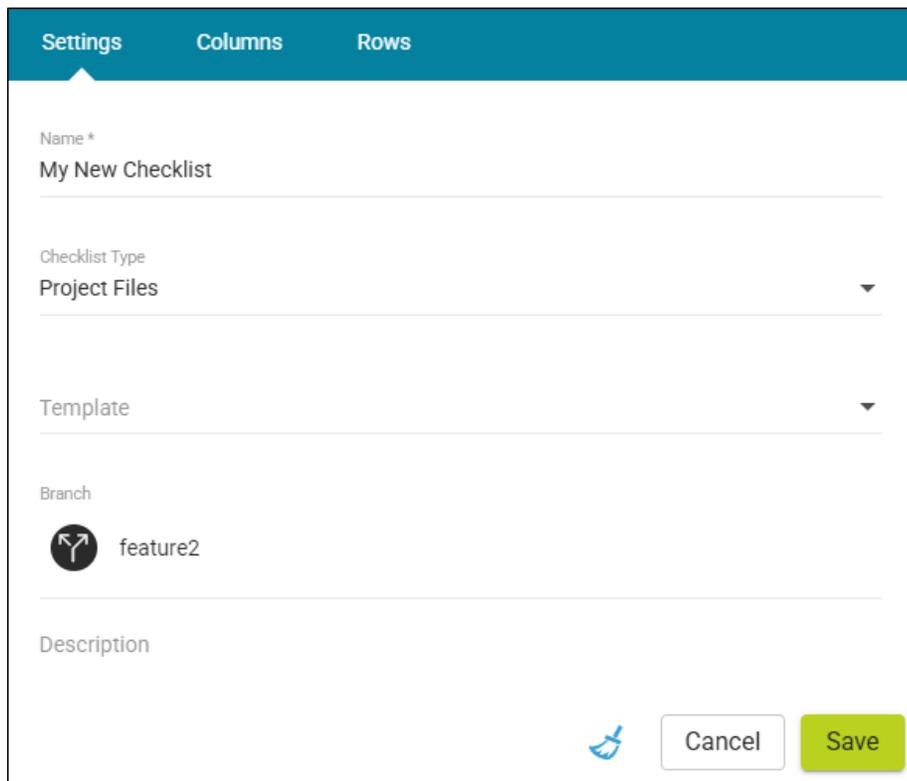
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. On the left side of the dialog, select the checklist template you want to delete.
5. Click .
6. In the dialog that opens, enter the name of the template in the field and click **Delete**.

CHAPTER 4

Branching in Checklists

When working with checklists, you can use branching.

This is extremely important due to the nature of content associated with checklists. When you are working on a checklist related to projects (as opposed to a generic checklist), it usually coincides with *content that is in a state of development*, rather than *content that has already been published*. And branching is the best way to isolate content that is in a state of development so that checklists can be associated directly with it.



The screenshot shows a settings form for a checklist. At the top, there are three tabs: "Settings" (selected), "Columns", and "Rows". The form contains the following fields:

- Name ***: My New Checklist
- Checklist Type**: Project Files (dropdown menu)
- Template**: (dropdown menu)
- Branch**: feature2 (with a branch icon)
- Description**: (empty text area)

At the bottom right, there are three buttons: a blue branch icon, a "Cancel" button, and a green "Save" button.



NOTE Branching in checklists is intended only for "Project File" checklists (i.e., those where you select files from a project), not for "Generic Lists."

This chapter discusses the following:

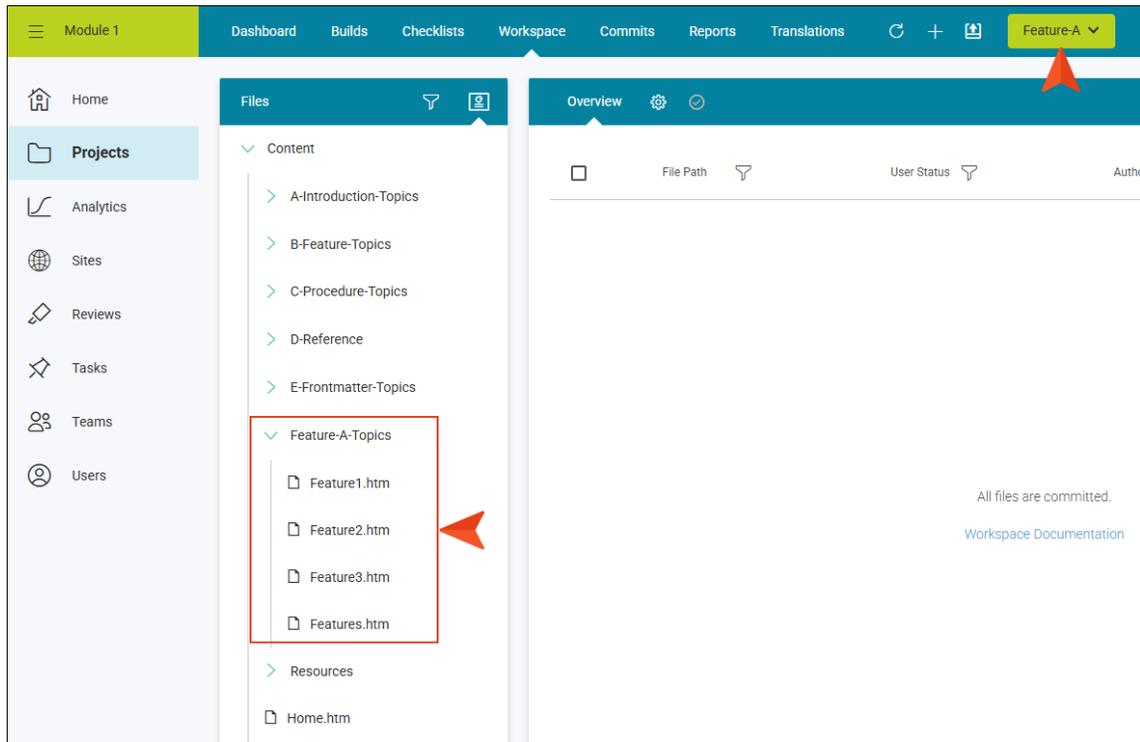
How to Create a Checklist for a Specific Branch	46
What's Noteworthy?	55

I How to Create a Checklist for a Specific Branch

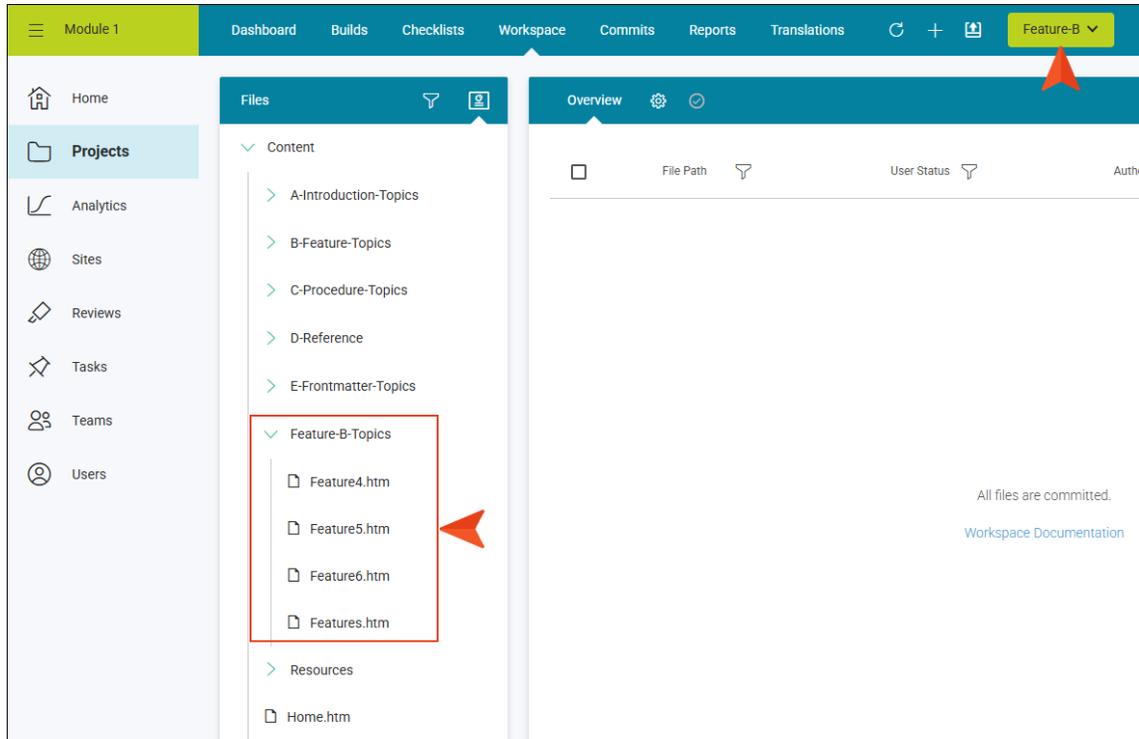
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. On the **Settings** tab, give the checklist a **Name** and make sure the **Checklist Type** is **Project Files**.
5. From the **Branch** field, select the name of the branch to be associated with the checklist.
6. Complete the rest of the options on this tab and the others as you normally would. See "Creating Checklists" on page 9.

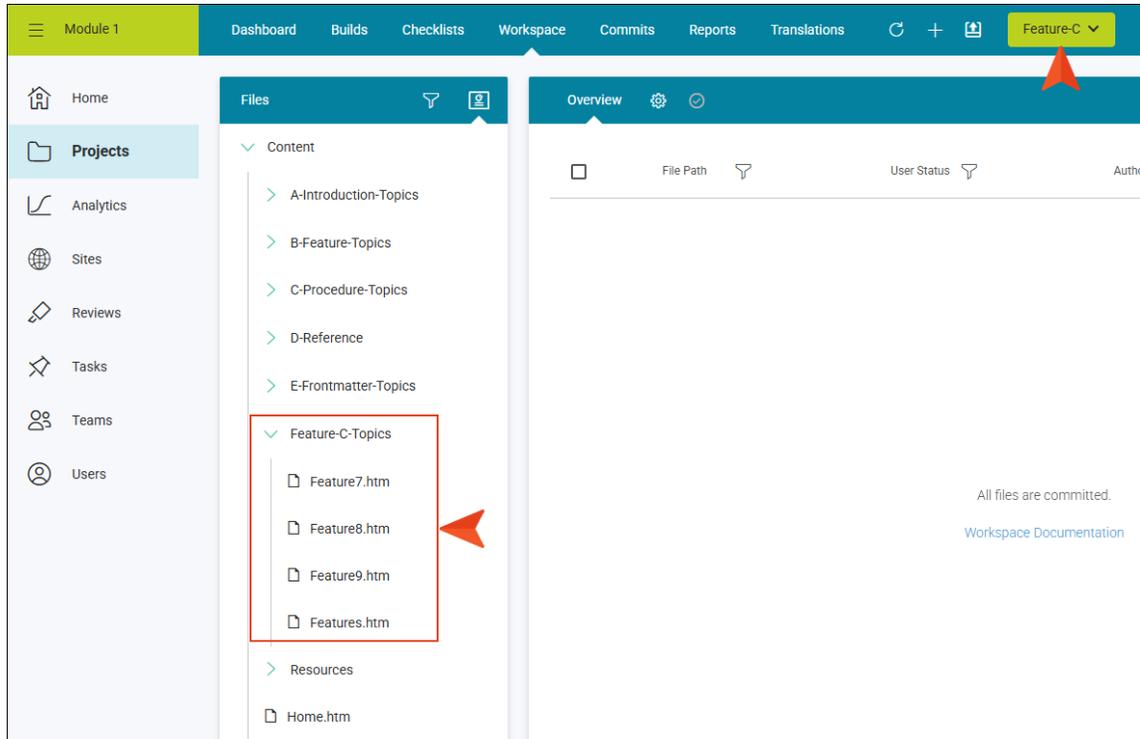
☆ **EXAMPLE** Your company's product is on version 5.0, and the initial plan is to add Feature A, Feature B, and Feature C in the new, upcoming release of version 6.0. Therefore, in Flare Desktop you create a branch called "Feature-A," another called "Feature-B," and a third called "Feature-C." You synchronize your changes with Flare Online.

In Flare Online, you open the Workspace page and switch to the Feature-A branch. Then, you add content for Feature A.



☆ Later, you decide to work on Feature B for awhile, so you switch to the Feature-B branch and add content. The next day, you focus on Feature C, so you switch to Feature-C and do some work.





There are many new topics and other files that you eventually end up adding for each of these branches, and there are several existing files that you update for each one as well. In addition, there are many tasks (e.g., edit, add to table of contents, spell check, review) that you want to keep track of for each file that you work on, just to make sure you are completing everything that is necessary.

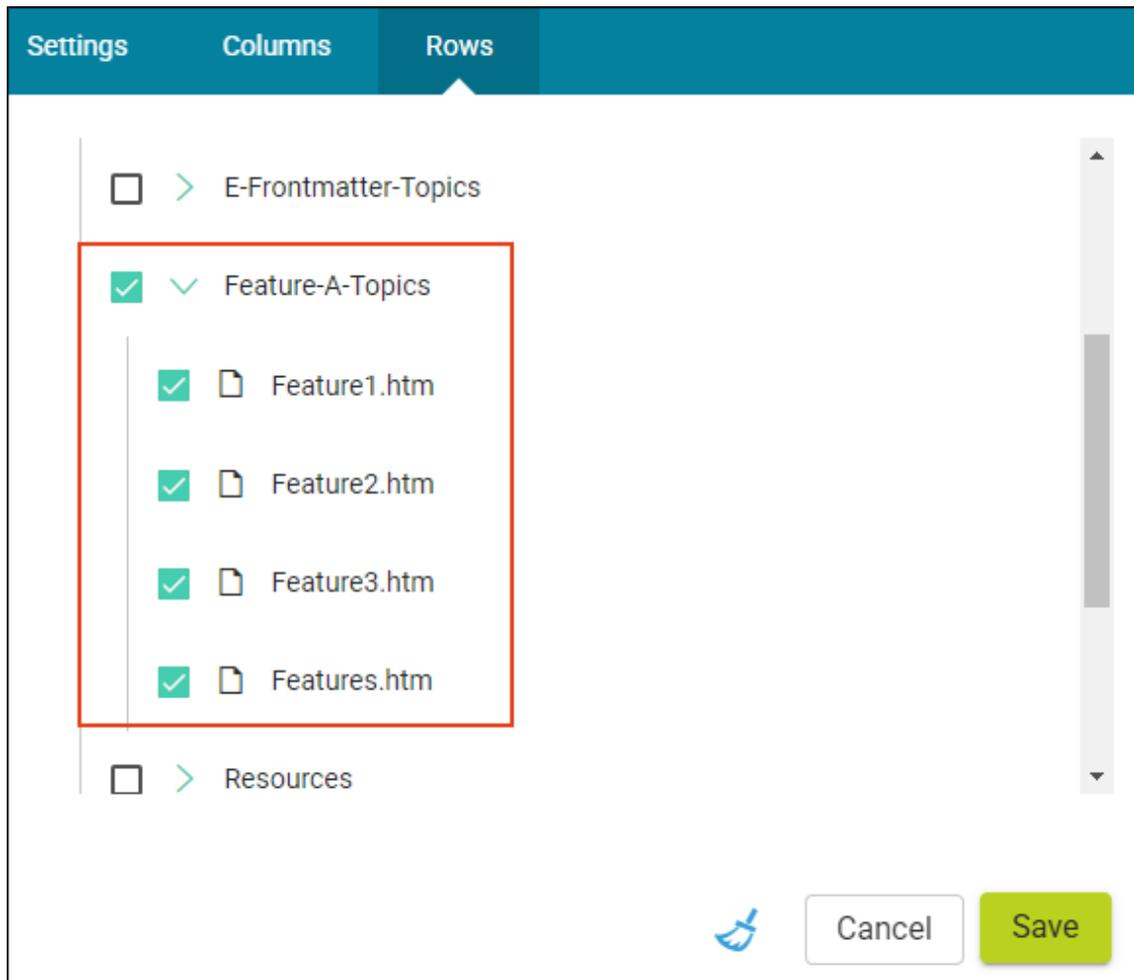
You need some checklists.

- ☆ In Flare Online, you create a new topic checklist called "Feature A Checklist," and you select the Feature-A branch when adding that checklist.

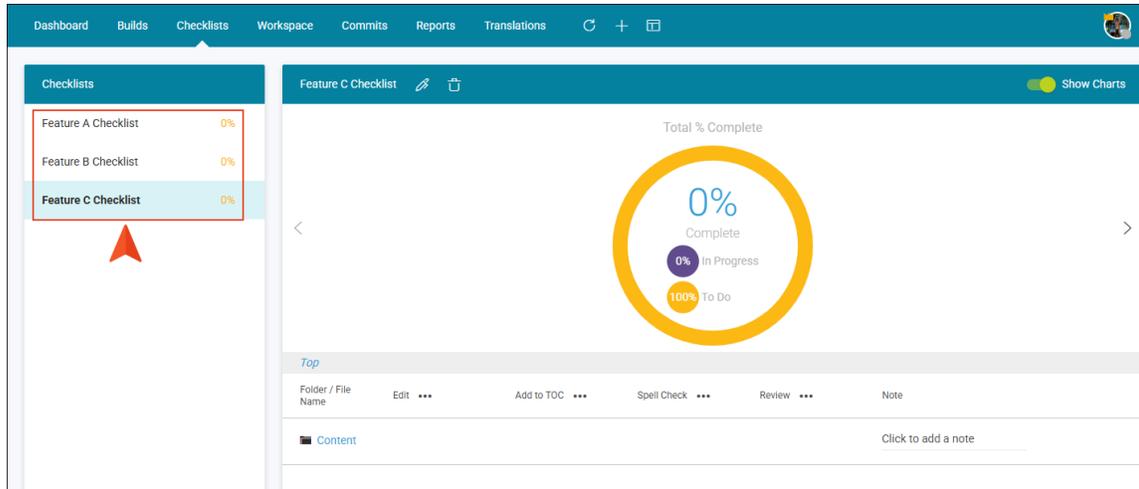
The screenshot shows a form with three tabs: Settings, Columns, and Rows. The 'Settings' tab is active. The form contains the following fields:

- Name ***: Feature A Checklist (indicated by a red arrow)
- Checklist Type**: Project Files (dropdown menu)
- Branch**: Feature-A (indicated by a red arrow and a red box around the selection)
- Description**: Checklist for changes related to Feature A in this release. (indicated by a red arrow)

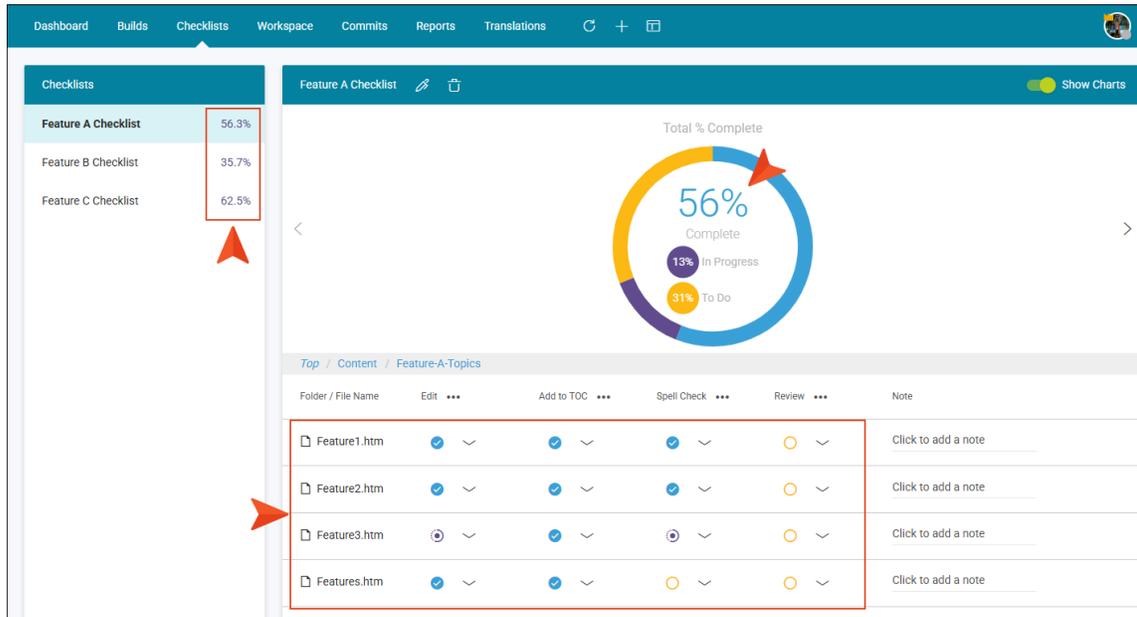
☆ For that checklist, you select many topics that are associated with the documentation of that new feature.



- ☆ You do the same for the other two new features, and you associate several different topics with each of those additional two checklists. So in the end, you have three checklists: Feature A Checklist, Feature B Checklist, and Feature C Checklist. Each of those checklists is associated with its related branch.



- ☆ As you continue to work on the documentation for each feature in the appropriate branches, you update each of the three checklists as necessary to track your progress.



Why did you create those separate branches? Why not just do everything in your "master" branch?

Well, at some point during the release cycle, a decision is made that Feature B is not ready and will take longer than anticipated. It won't go live until version 7.0. If you had done all of the work for each of the three features in the master branch, you'd have a big mess on your hands, because you'd have to figure out a way to back out the changes only for Feature B. But because you separated the work into three feature branches, it's no problem.

☆ Eventually, you complete your work for Feature A and Feature C, and you wrap up the checklists for each. You have confidence that all the necessary documentation tasks have been completed for each feature.

The screenshot displays a software interface with a navigation menu at the top: Dashboard, Builds, Checklists, Workspace, Commits, Reports, and Translations. The main content area is titled 'Feature A Checklist' and includes a 'Show Charts' button. On the left, a 'Checklists' sidebar shows 'Feature A Checklist' at 100%, 'Feature B Checklist' at 35.7%, and 'Feature C Checklist' at 100%. A central progress chart shows 'Total % Complete' at 100% (Complete), 0% (In Progress), and 0% (To Do). Below the chart is a table with columns: Folder / File Name, Edit, Add to TOC, Spell Check, Review, and Note. The table lists four files: Feature1.htm, Feature2.htm, Feature3.htm, and Features.htm, each with a 'Click to add a note' link.

Folder / File Name	Edit	Add to TOC	Spell Check	Review	Note
Feature1.htm	✓	✓	✓	✓	Click to add a note
Feature2.htm	✓	✓	✓	✓	Click to add a note
Feature3.htm	✓	✓	✓	✓	Click to add a note
Features.htm	✓	✓	✓	✓	Click to add a note

And eventually in Flare Desktop you merge your Feature-A and Feature-C branches into the master branch. Then from that branch, you publish the final documentation output for version 6.0 of the product.

What's Noteworthy?

⚠️ **WARNING** – Losing Statuses When Switching Branches

The Branch field is also available when you need to edit a checklist, so it is possible to switch to a different branch than the one you originally started with. However, use caution when doing this, because statuses are not stored separately on the same files across branches. The status will only be retained if the file is unique to that branch.

For example, let's say you have a branch called "Feature-A" and another called "Feature-B." The topic called "Getting Started" exists in each of those branches. You've created a checklist pointing to the Feature-A branch, and you've set the status for the Getting Started topic to "Complete."

Later, you open the properties for that checklist and switch it to use the Feature-B branch. You change the status for the Getting Started topic to "In Progress."

Then, sometime later you open that checklist, bring up the properties, and switch the branch back to Feature-A. When you look at the status for the Getting Started topic, it now says "In Progress." It did not retain the "Complete" status that you originally set for that branch.

However, your Feature-A branch also has a topic called "Feature A Requirements," and this topic is unique to that branch. No other branch contains that topic. You've set the status for that topic in your checklist to "N/A." You switch the checklist to use another branch and do some work in it. When you switch the checklist back to the Feature-A branch later, you'll notice that this unique topic still has its original status.

For these reasons, we recommend that you avoid trying to use different branches for the same checklist. Instead, create a separate checklist for each branch where you want to track progress.

📄 **NOTE** For more detailed information on Git branching and how to use it with projects (including creating, merging, and publishing branches to Flare Online), see the Flare Desktop Help system and the related source control branching videos.

APPENDIX

PDFs

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

AI Assist Guide

Analytics Guide

Authoring Guide

Branding Guide

Building Output Guide

Checklists Guide

Conditions Guide

Getting Started Guide

*Images and Multimedia
Guide*

*License Management and
Purchasing Guide*

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Targets Guide

Tasks Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide