USER GUIDE

MADCAP FLARE ONLINE

Checklists Guide

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CHAPTER 1

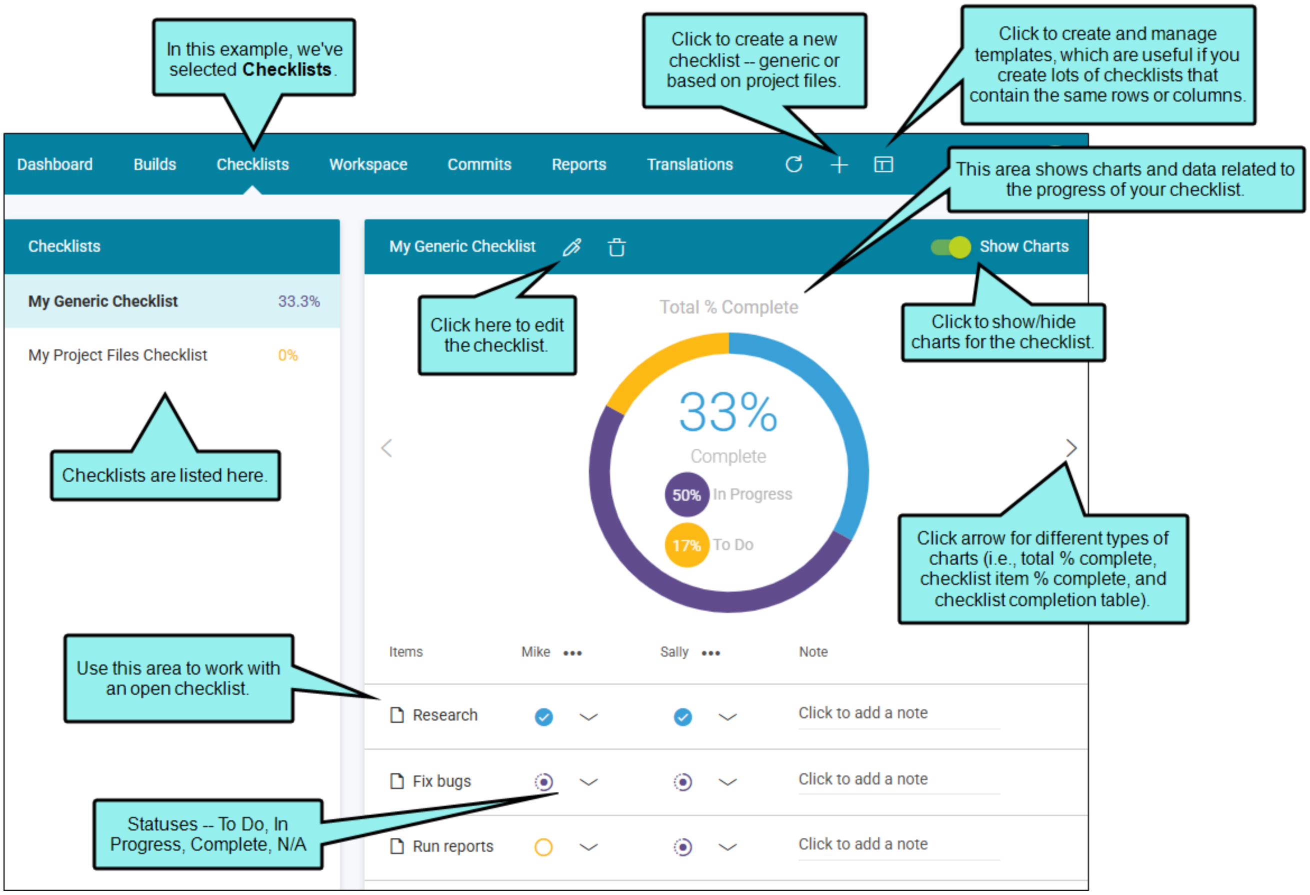
Introduction

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.


In this example, we've selected **Checklists**.
Click to create a new checklist -- generic or based on project files.
Click to create and manage templates, which are useful if you create lots of checklists that contain the same rows or columns.
Dashboard
Builds
Checklists
Workspace
Commits
Reports
Translations
This area shows charts and data related to the progress of your checklist.
Checklists
My Generic Checklist
33.3%
My Project Files Checklist
0%
My Generic Checklist
Show Charts
Click here to edit the checklist.
Total % Complete
Click to show/hide charts for the checklist.
33%
Complete
50% In Progress
17% To Do
Checklists are listed here.
Click arrow for different types of charts (i.e., total % complete, checklist item % complete, and checklist completion table).
Items
Mike
Sally
Note
Use this area to work with an open checklist.
Research
Click to add a note
Fix bugs
Click to add a note
Statuses -- To Do, In Progress, Complete, N/A
Run reports
Click to add a note

Main Activities

- "Creating Checklists" on page 9
- "Editing Checklists" on page 33
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Checklist Templates

- "Creating Checklist Templates" on page 37
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- "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:

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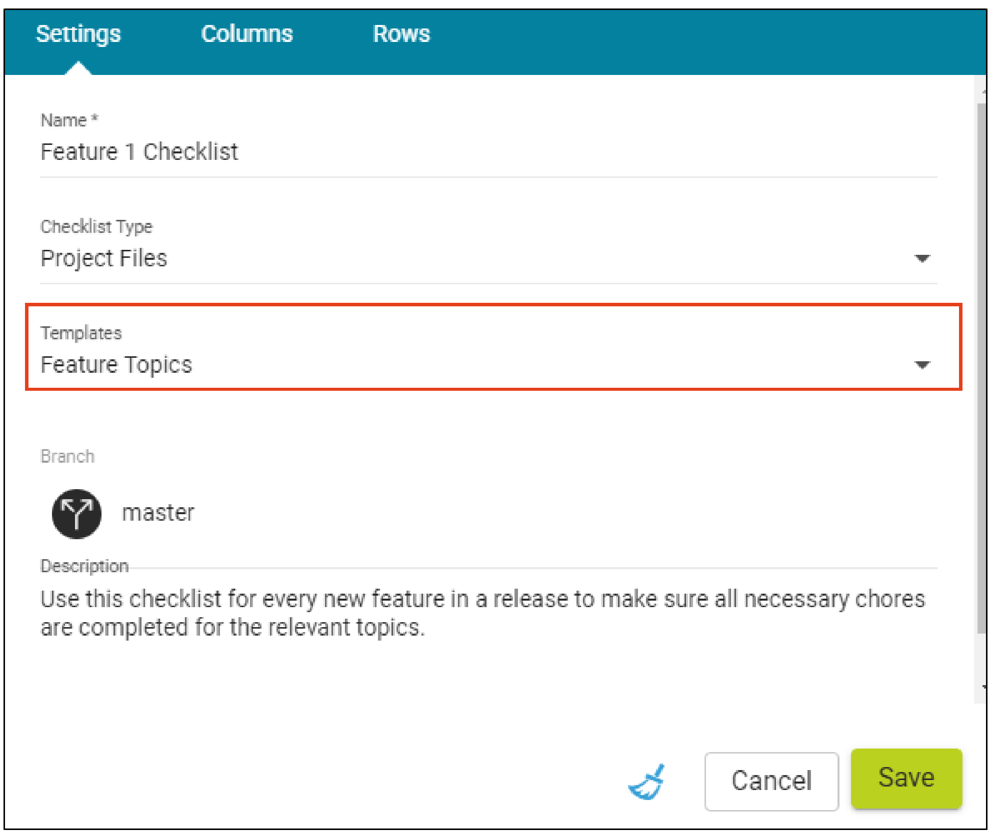
Editing Checklists 33
Deleting Checklists 34
Setting Notifications for Checklists 35

Creating Checklists

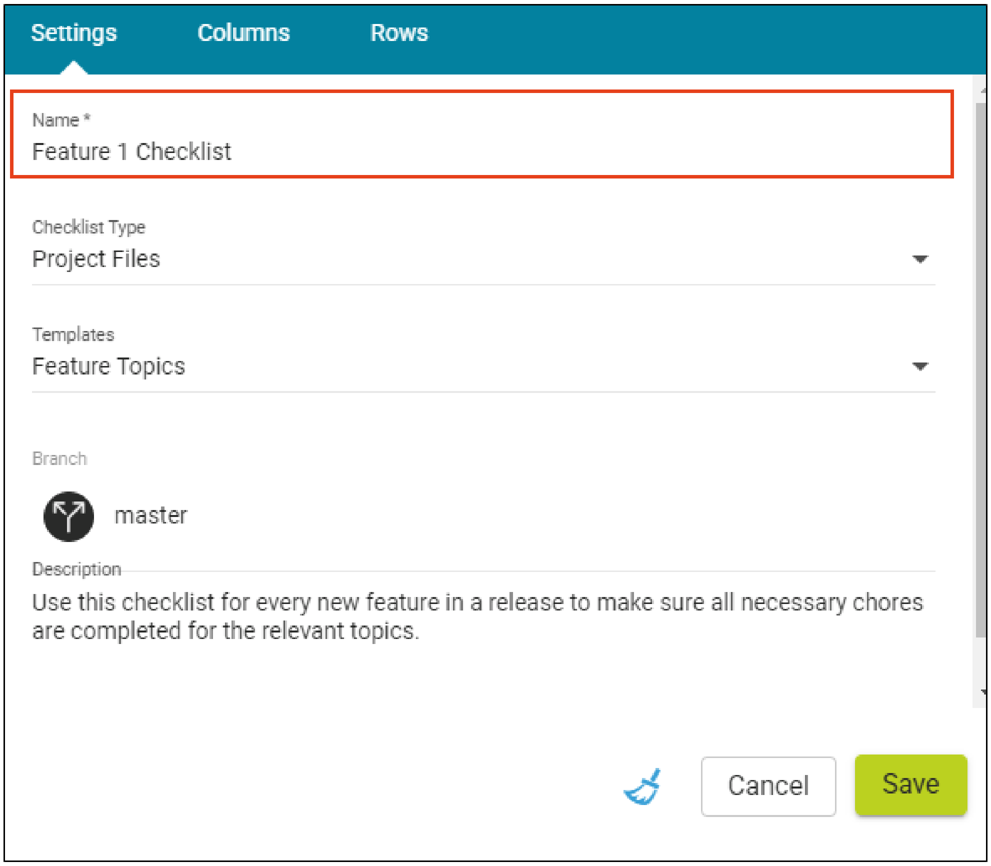
You can create checklists to keep track of work related to your projects.

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.

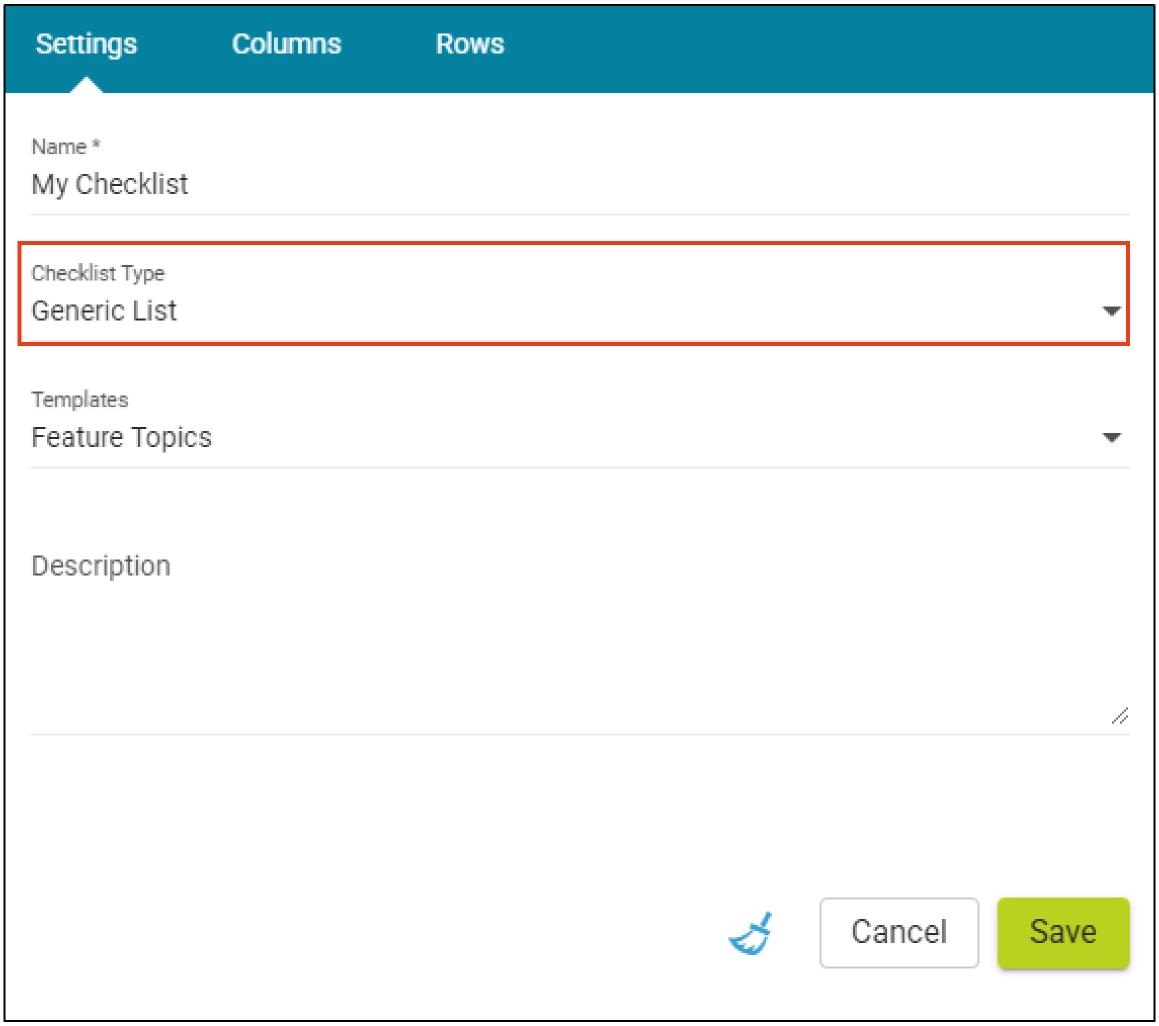


5. Complete the **Name** field.

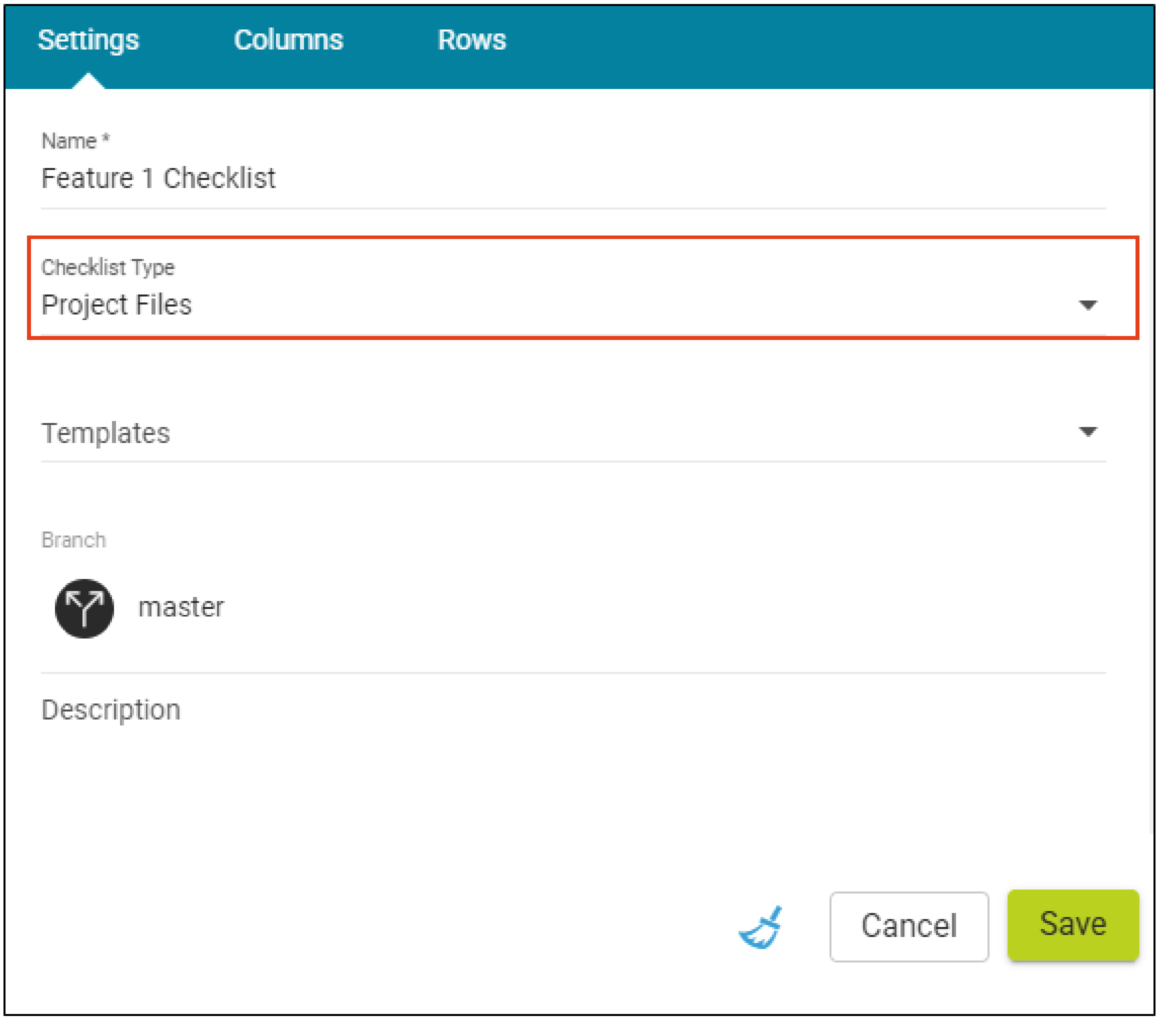


6. From the **Checklist Type** field, you can select a generic or project files checklist type.

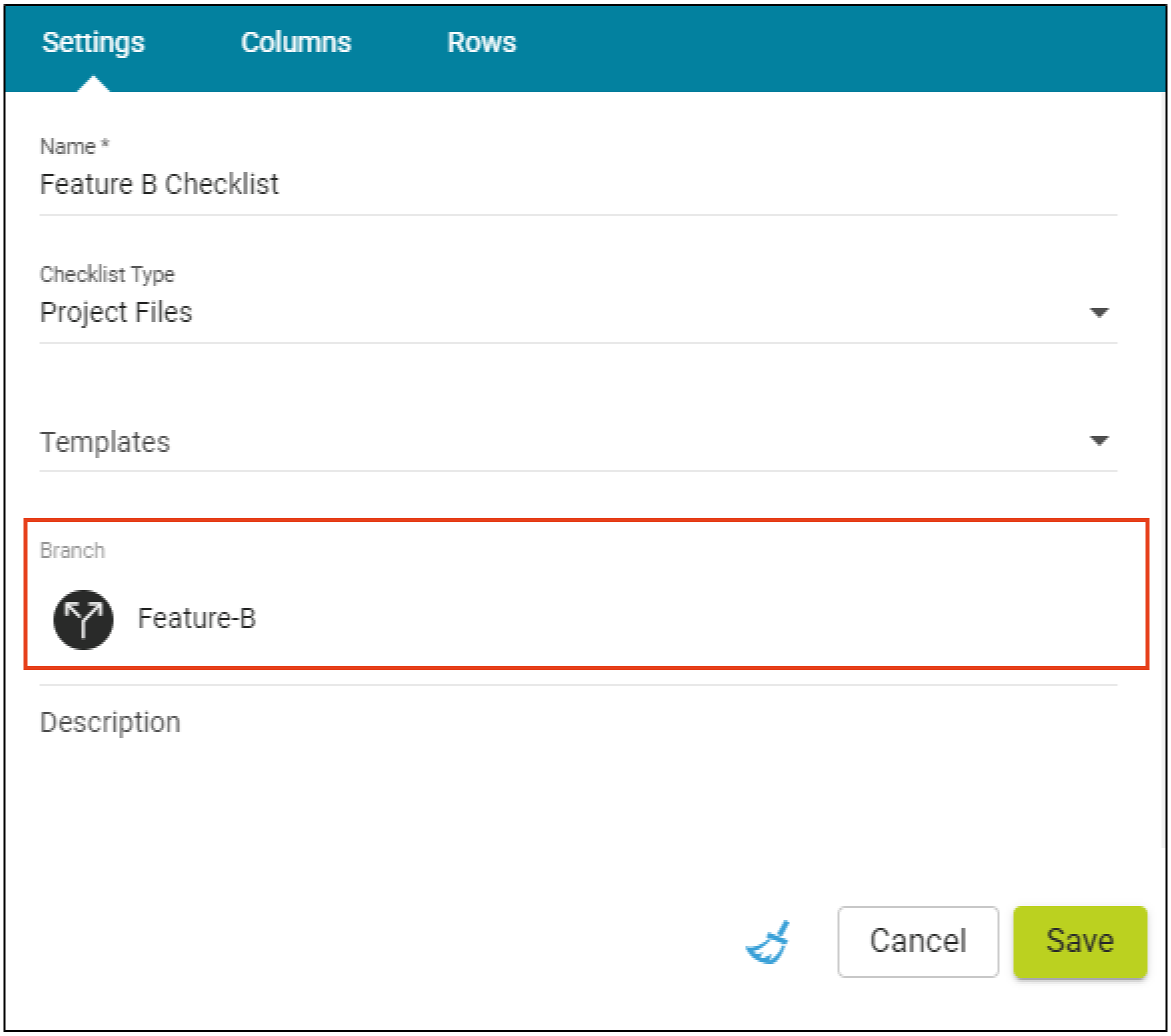
   - **Generic List** This lets you add a checklist where each row is manually created. The checklist can pertain to anything you want.



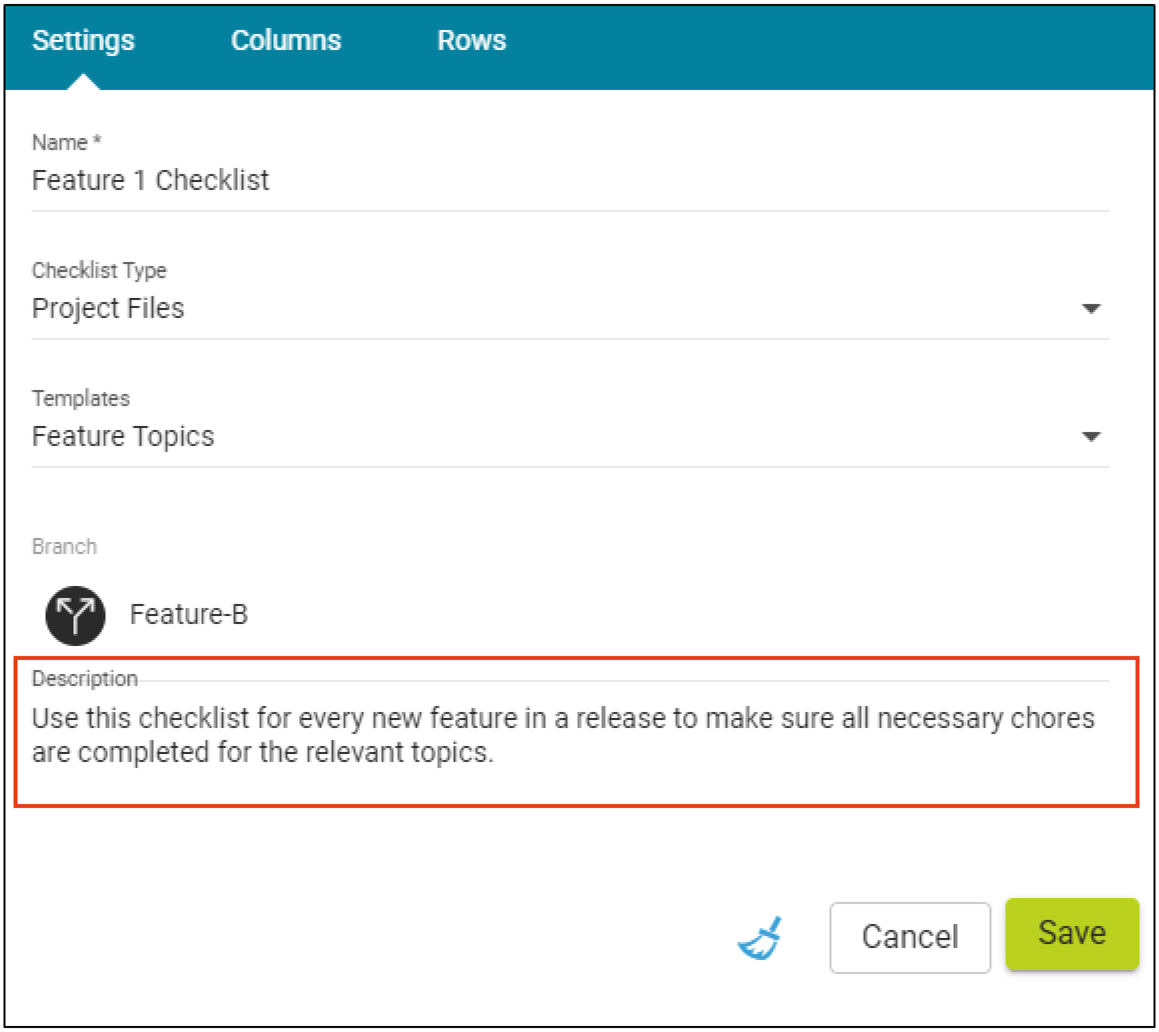
- **Project Files** This lets you add a checklist where the rows are based on files from your project. Most commonly, these kinds of checklists will be used to track the progress of topics as you edit them, but if you like, you can create checklists that include any other kinds of files from the project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



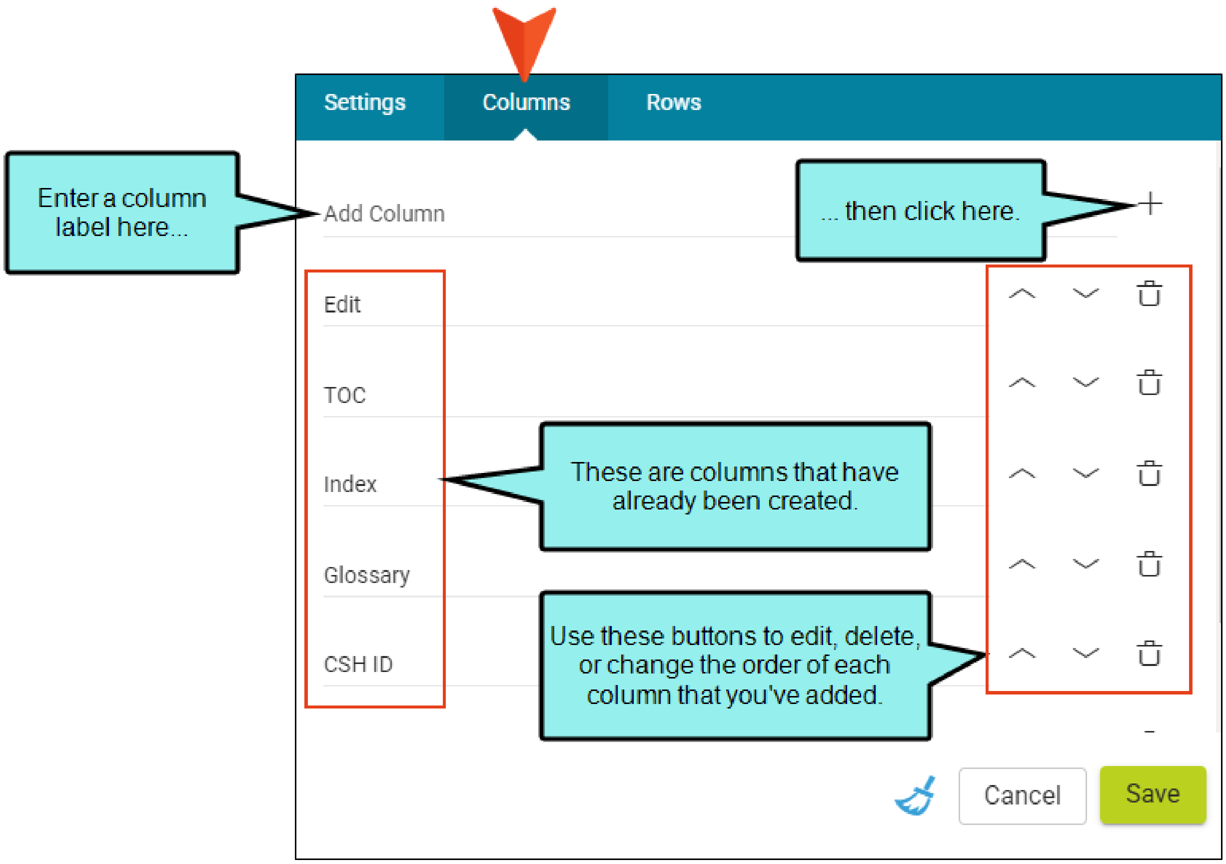
7. (Optional) If you are creating a "Project Files" type of checklist and using branching (which is highly recommended), click the **Branch** field. Then, select the name of the branch to be associated with the checklist. See "Branching in Checklists" on page 44.



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.



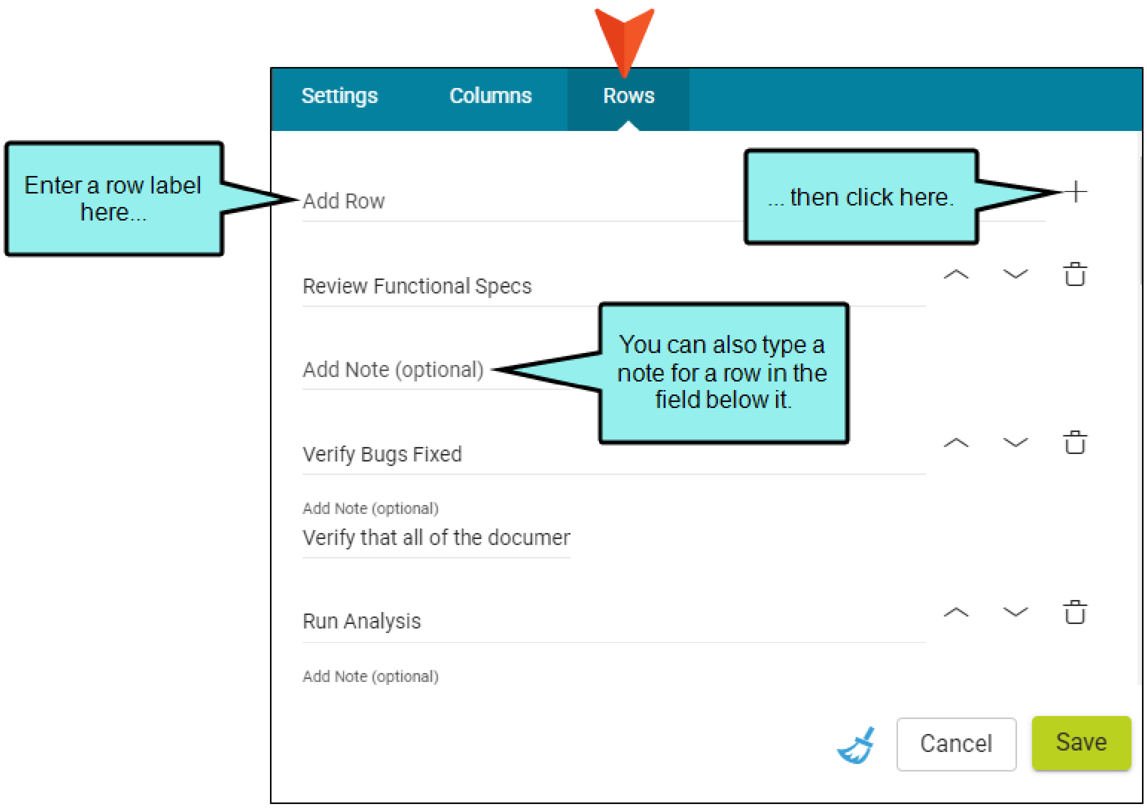
9. Select the **Columns** tab. Create columns by typing a label in the text box and pressing **ENTER** or clicking ⊞. Repeat this for each column you want to add. You can use the up and down arrows to change the order of the columns (the column at the top of the dialog will appear at the far left in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

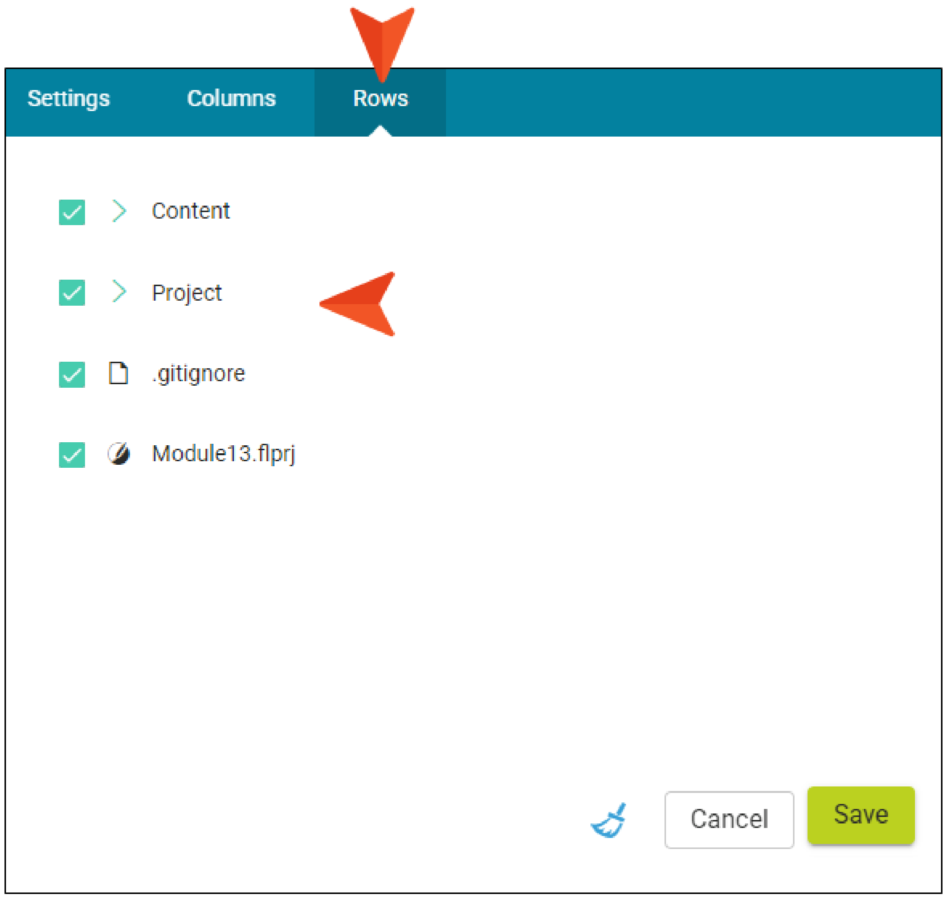
      You can also complete the **Add Note** field for any row.



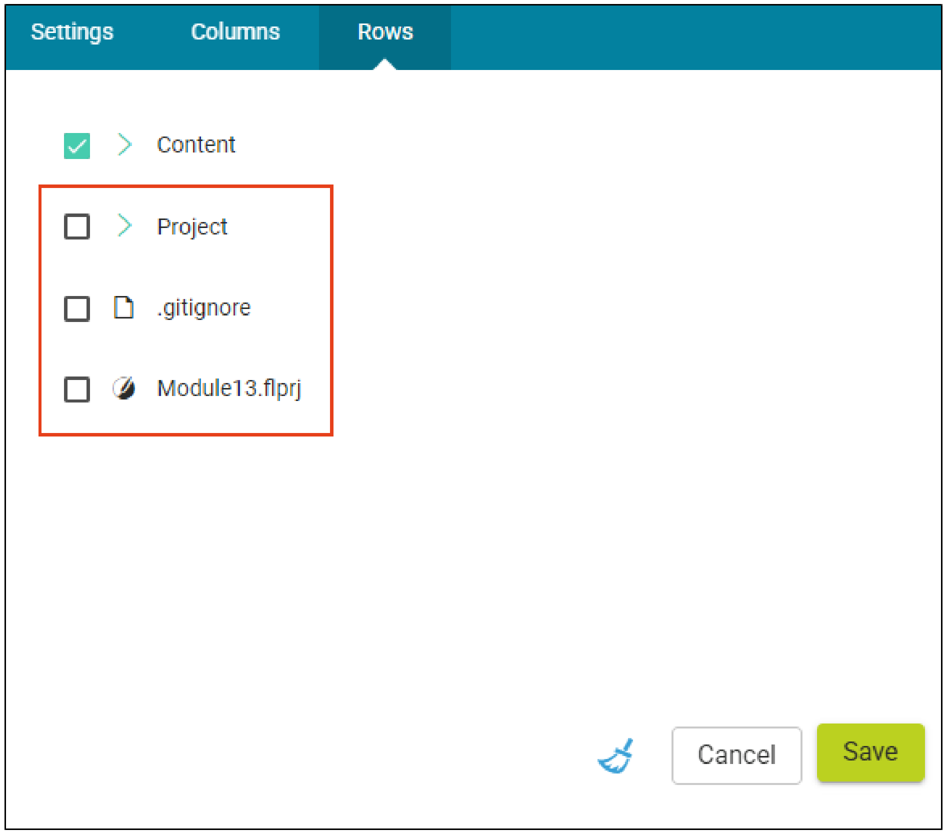
    - **Project Files** Your project folders and files are shown on the Rows tab, with check boxes next to each item. Any item with a check mark will be included in the checklist. It is likely that you will only want to include certain files in the checklist. Therefore, remove the check marks for any files 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..

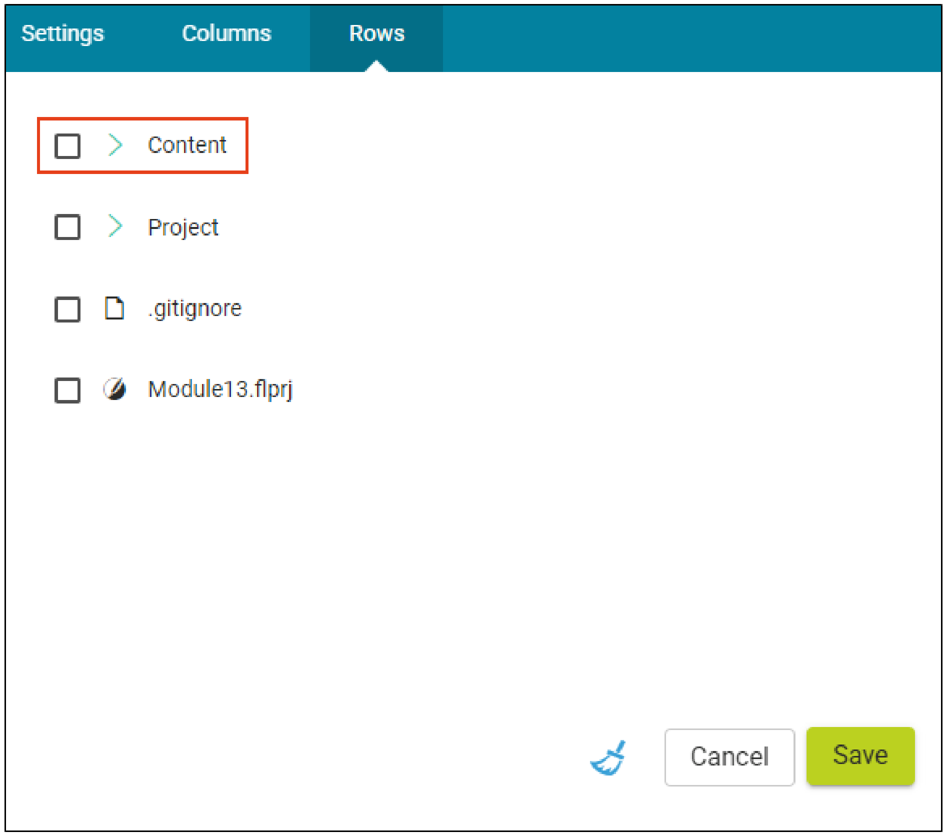
When you create the checklist, you will see the following on the Rows tab:



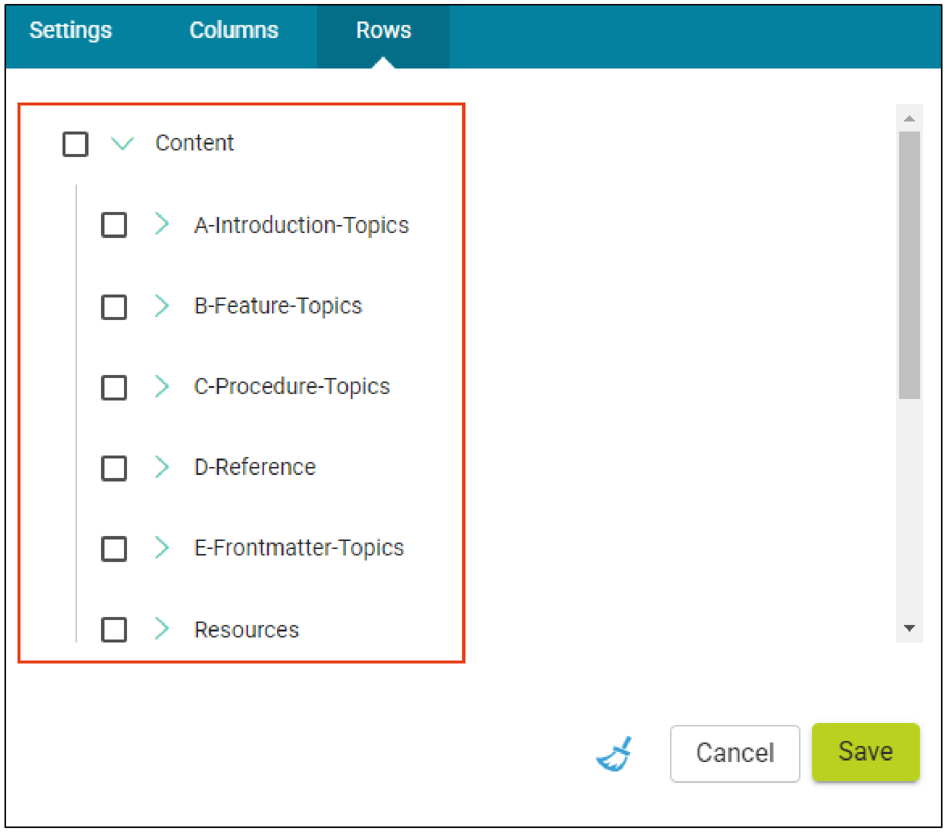
You don't want any of the files from the Project folder to be part of the checklist, and you don't want the .gitignore or main project file included either. So you can remove those check marks.



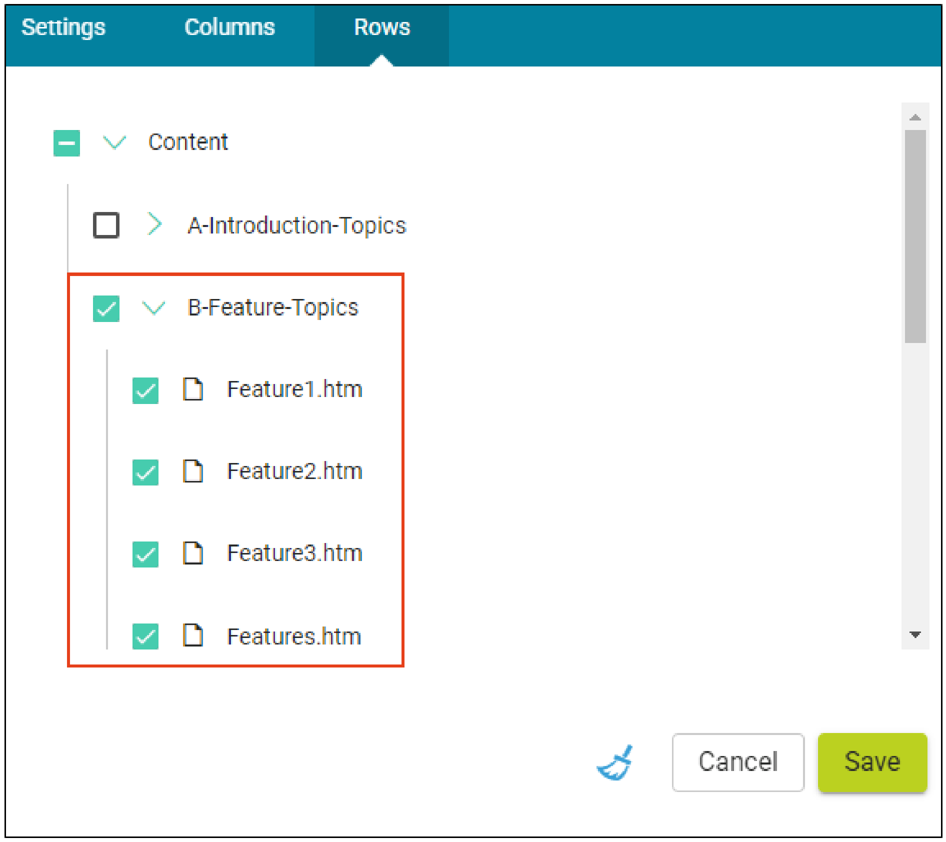
The files to be included in the checklist are topics, which are found in the Content folder. However, most of the topics and other files from the Content folder will not be part of the checklist. So the easiest thing is to initially remove the check mark from that folder as well.



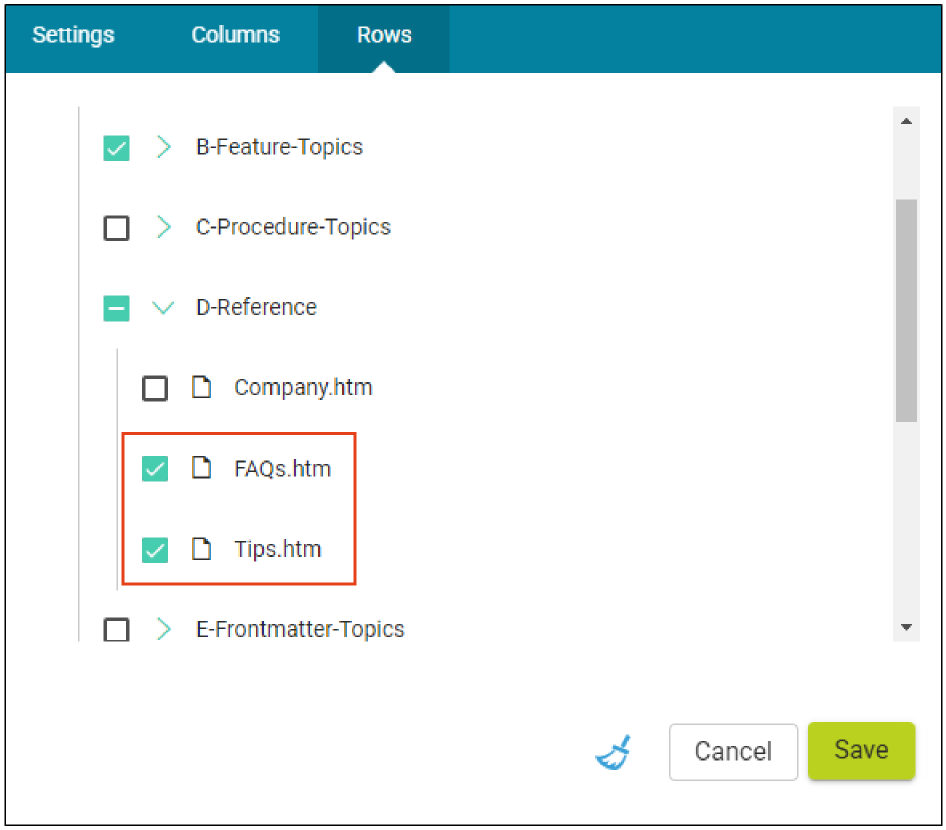
To choose specific topics in the Content folder, click the arrow to the left to expand it. You will see all of the subfolders and files within it.



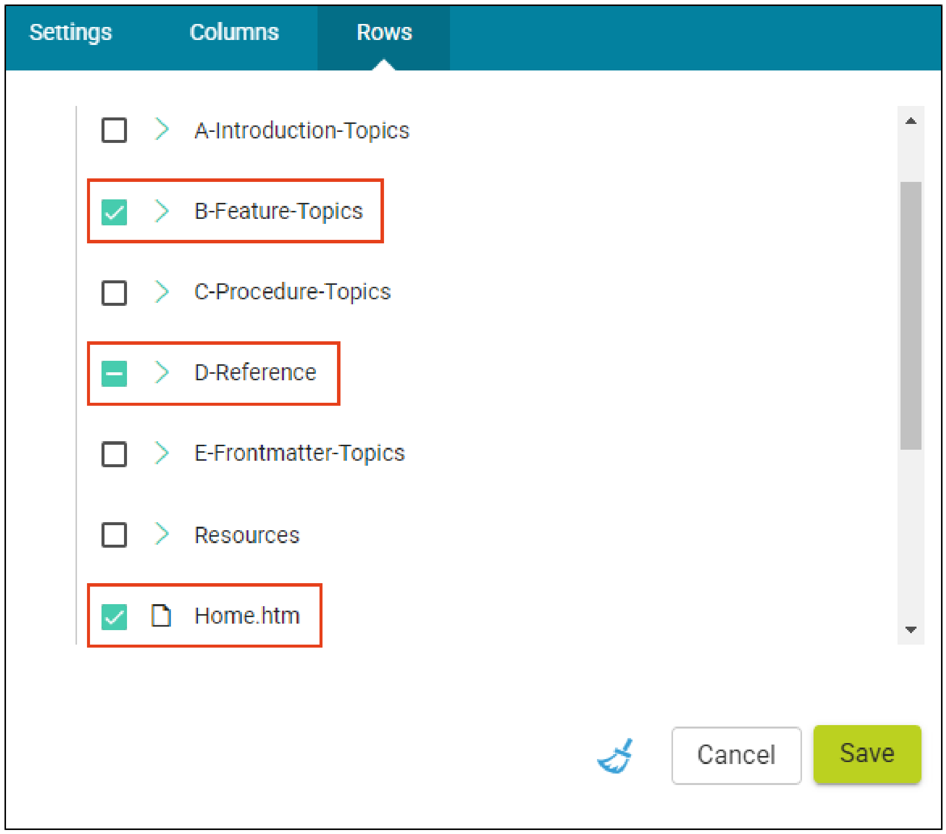
Since you want all of the topics in “B-Feature-Topics” to be included, you can just click the check box next to that subfolder. If you expand that subfolder, you will see that all of the topics within it are automatically selected.



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

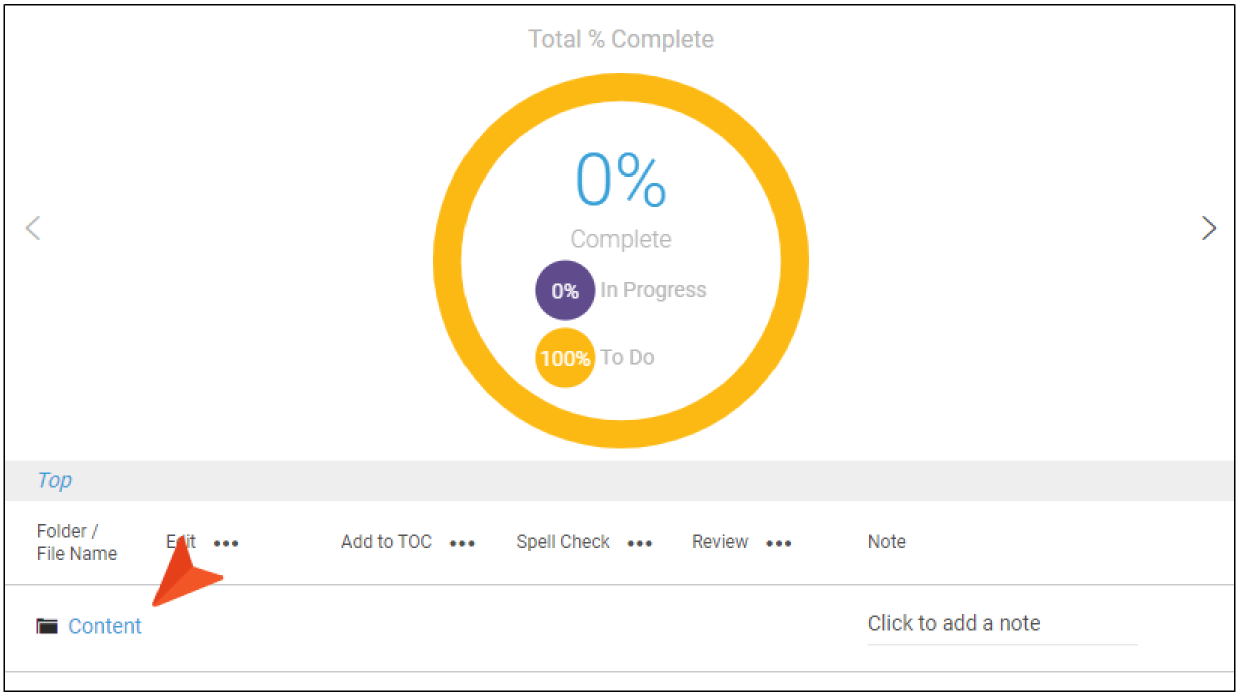


And finally, you want the Home topic at the root level of the Content folder to be included, so select it. The dialog should now look as follows when all subfolders are collapsed. Notice that the "D-Reference" subfolder has a small dash instead of a check mark; that's because only some of the topics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

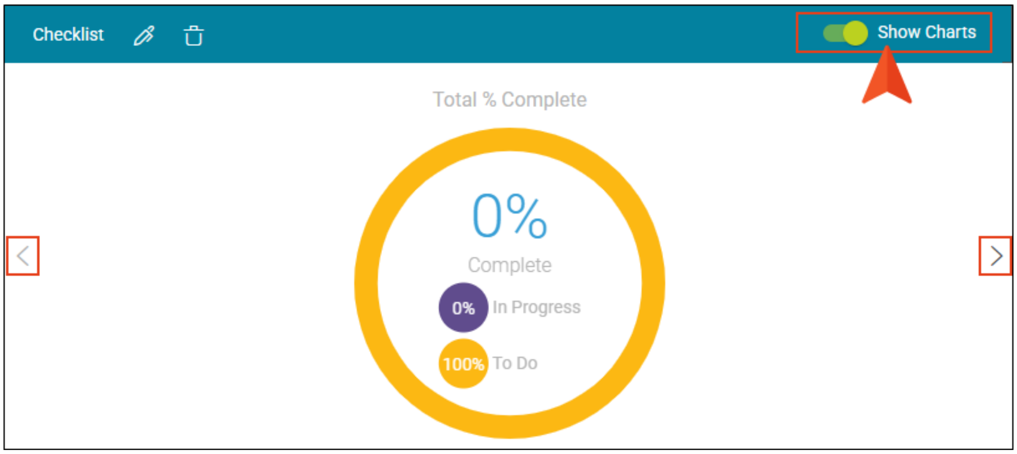


11. Click **Save**. The checklist is created and its name appears on the left side of the interface. The checklist graph and items appear to the right.

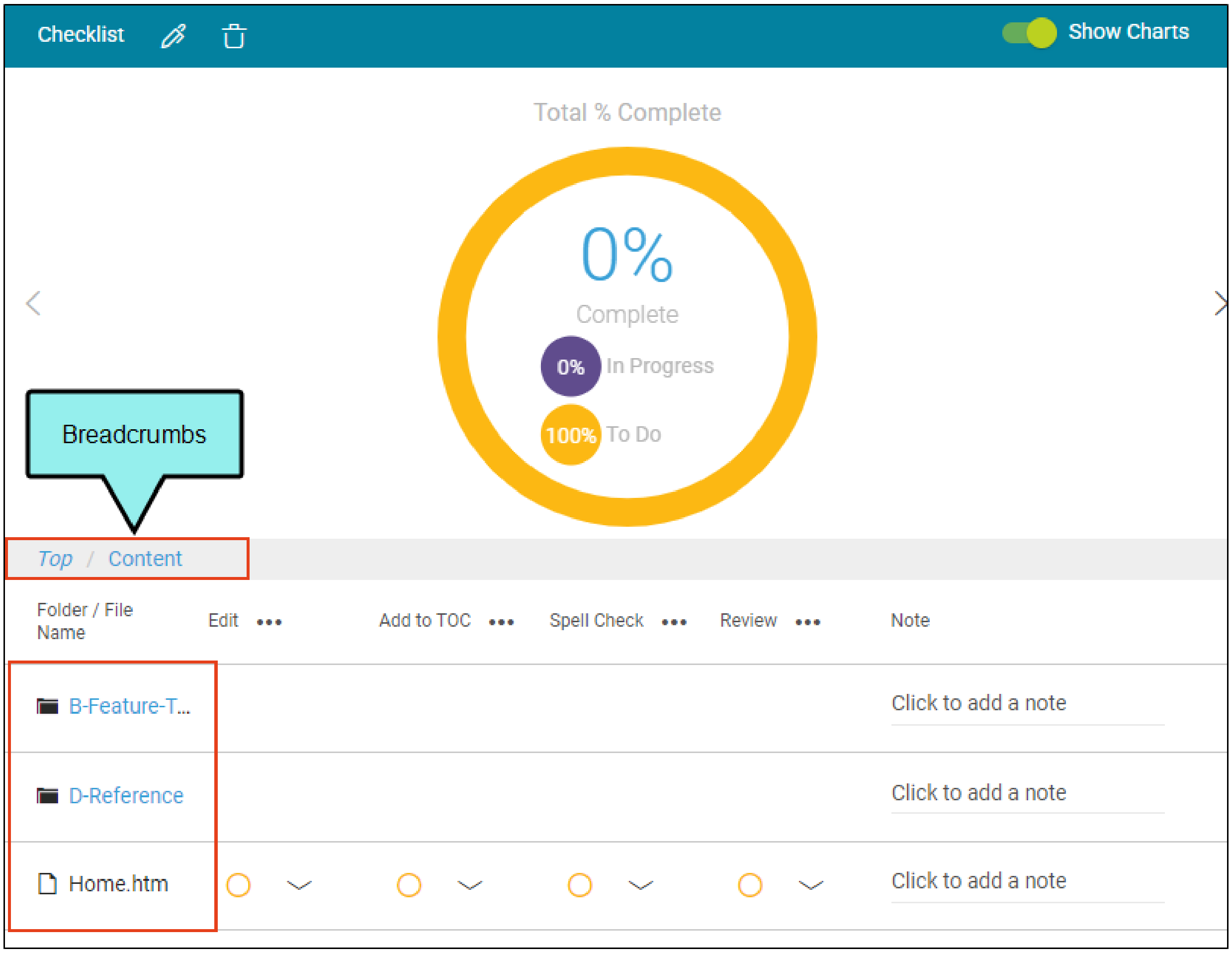
12. If you have created a checklist based on project files, you will see the first folder level (e.g., Content).



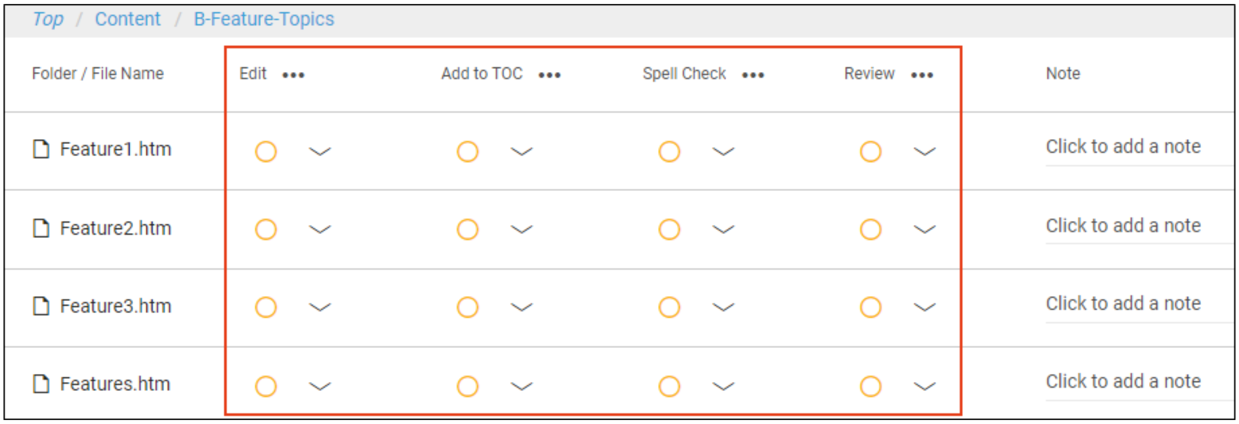
NOTE Since the Show Charts option is selected by default, the first folder level will display below the checklist graph. With Show Charts activated, you can click the arrow on the side of the current chart to see a different chart (e.g., Total % Complete, Checklist Item % Complete, and Checklist Completion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



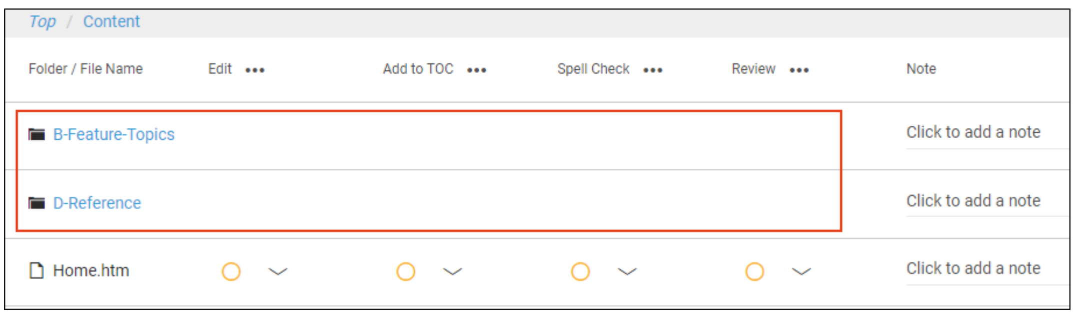
To navigate to a particular subfolder or set of files, click that folder. You will then see the content within that folder, as well as a breadcrumbs trail.



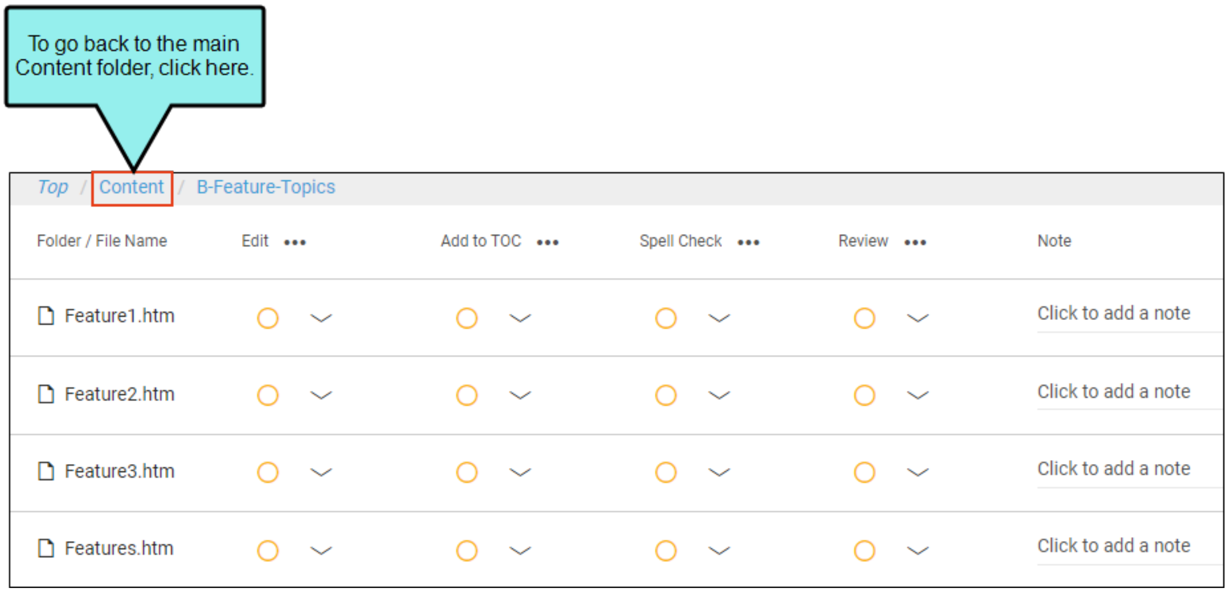
When you open a folder that contains files, you will see a circle for each column. These circles are where you set the status of each item.



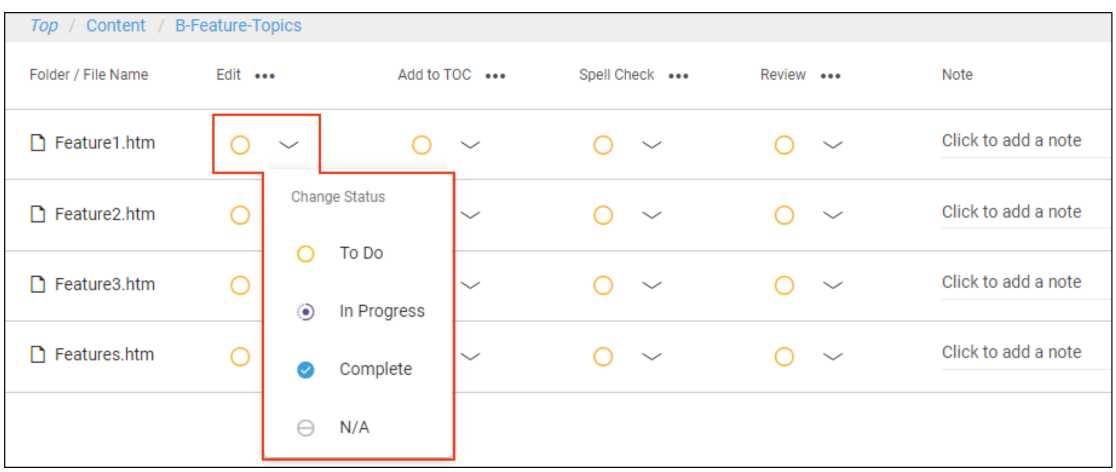
NOTE You will not see the status circles for rows represented by folders. You can set the status for files only.



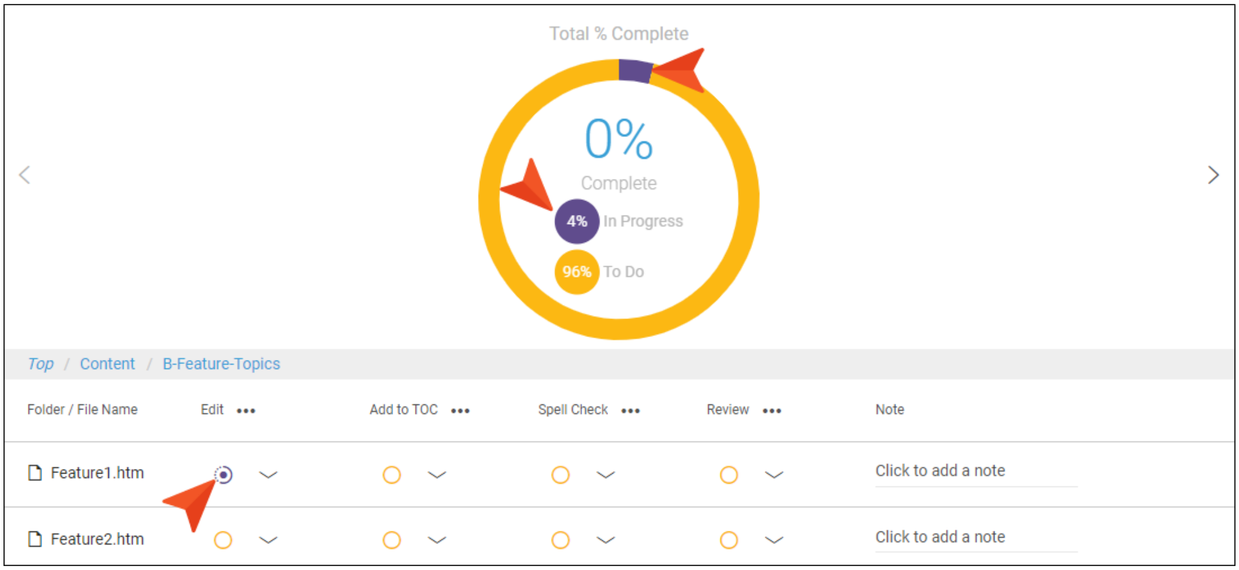
If you want to navigate back to a particular folder or subfolder, click it in the breadcrumbs.



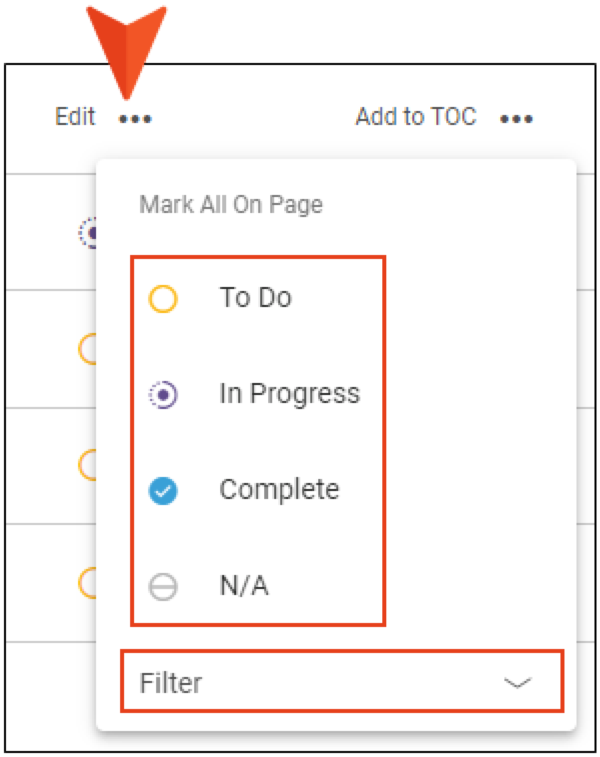
13. Click a circle and it will cycle through all the statuses each time you click. Alternatively, you can click the down arrow next to the circle and choose one of the statuses from the context menu.
    - To Do
    - In Progress
    - Complete
    - N/A Select this status if a particular column is not applicable for that row.



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.

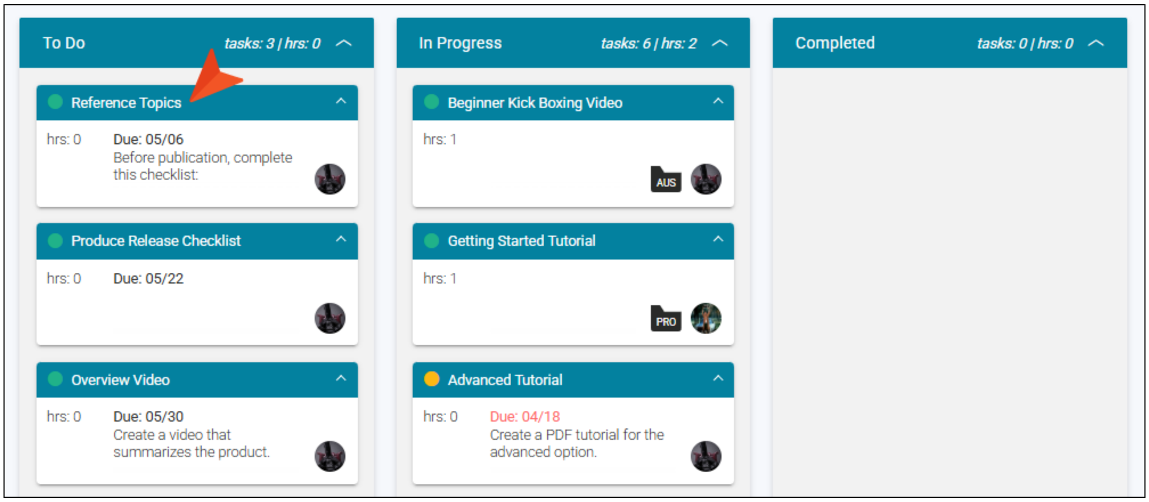


You can also click the Filter drop-down in the context menu to either select to filter only on a specific status, or clear a status type from the checklist.

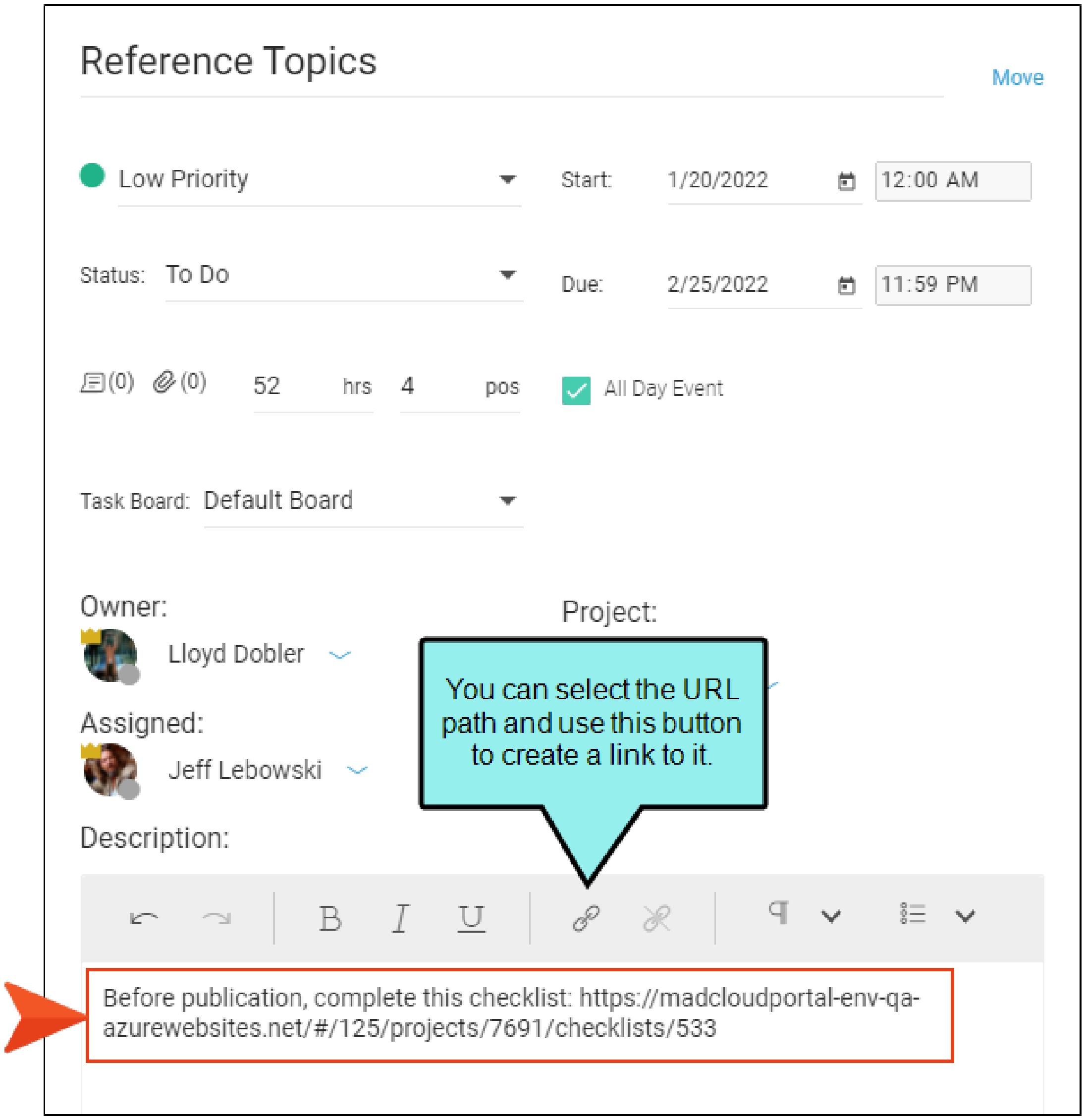
14. (Optional) If you want to add a comment for a particular row, you can click in the **Note** cell and type it.

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.



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

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**.

Deleting Checklists

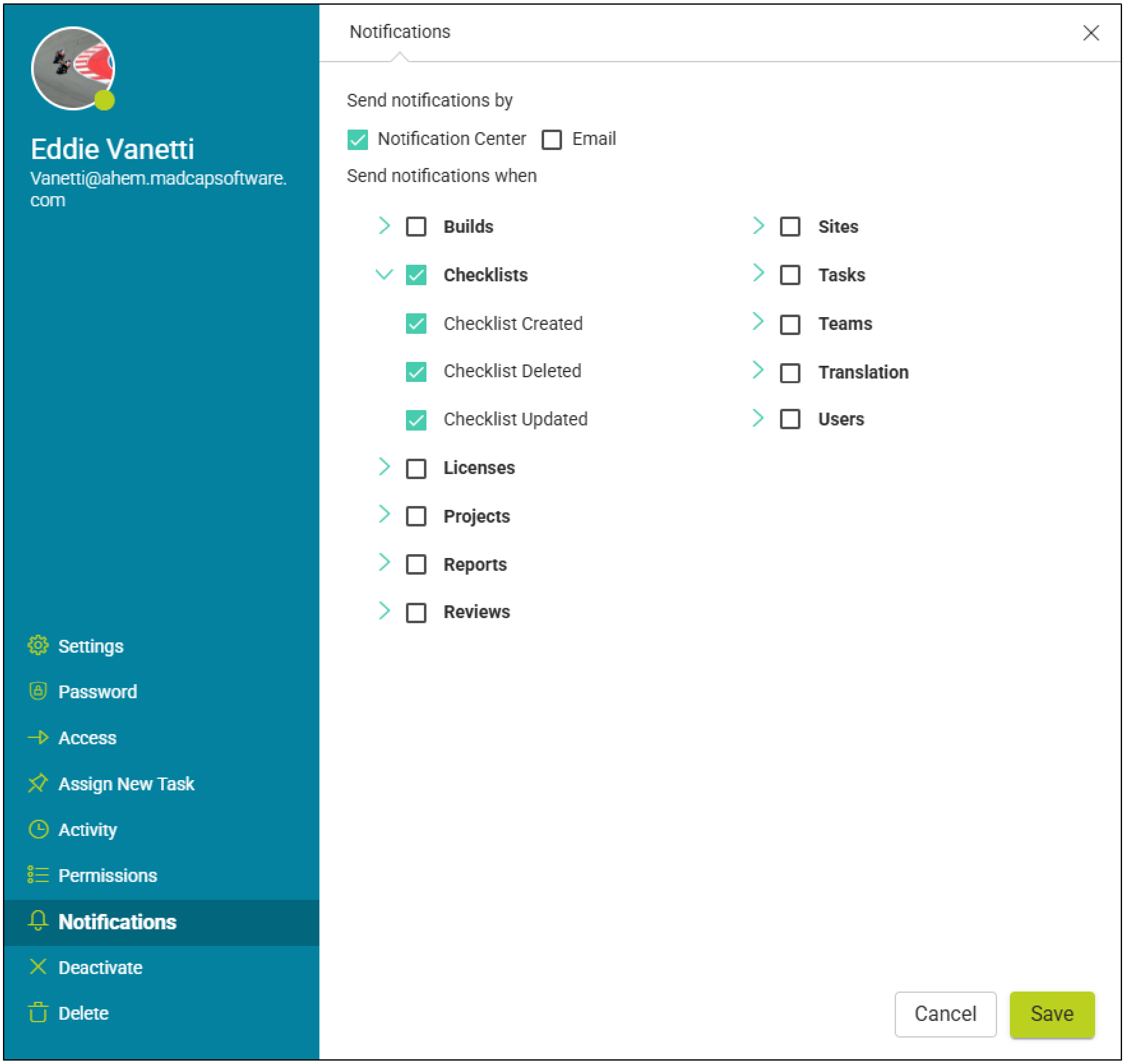
Checklists can be deleted from the project.

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.



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

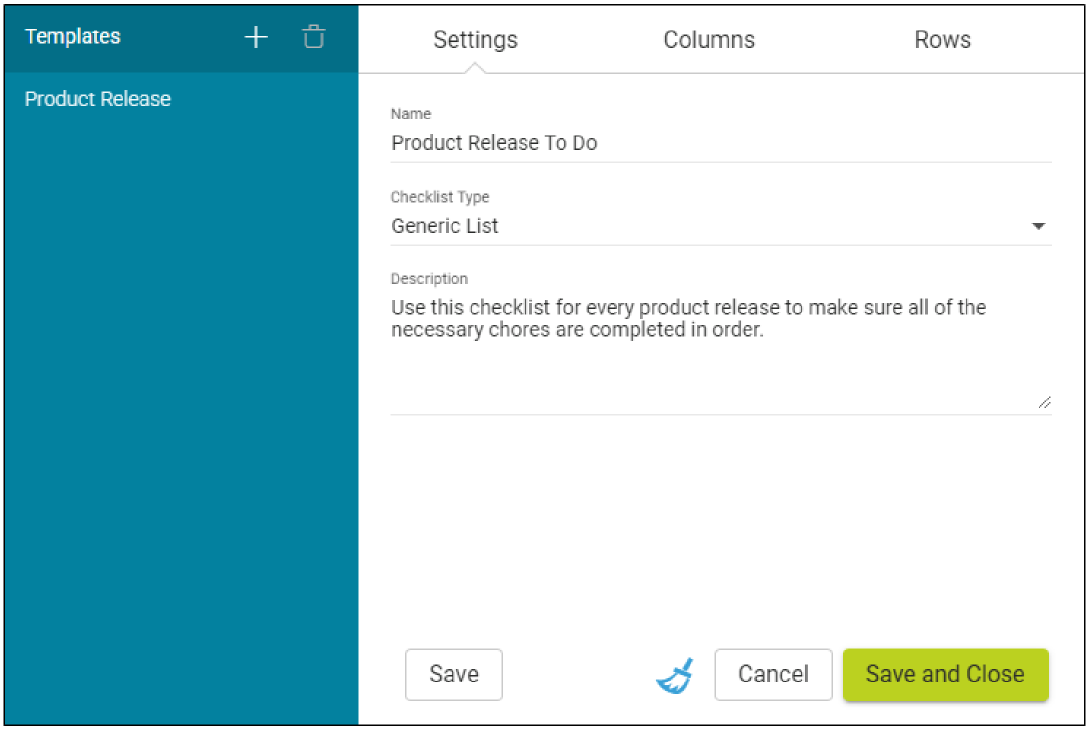
You can create checklist templates to save time when adding new checklists. When you create a new checklist, you can base it on any of your saved templates. This is quite useful when you are creating many checklists that share the same type, description, columns, rows, or notes. Rather than typing all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

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

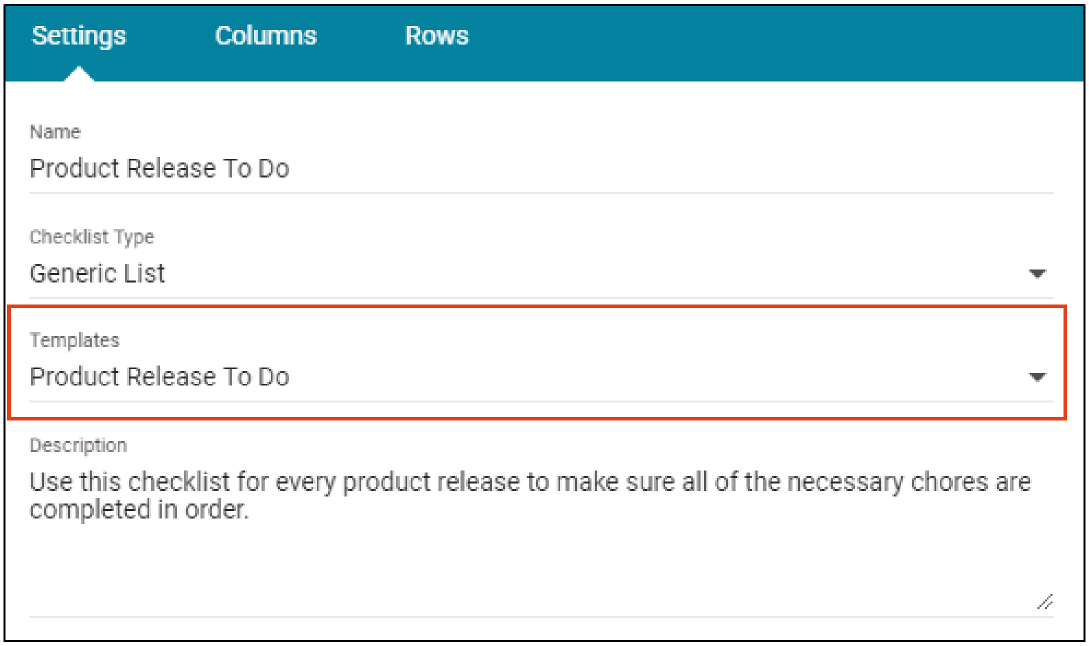
EXAMPLE You have a product release "To Do" checklist that you use every time you publish updated documentation for each of your company's products. The checklist has just one column to indicate whether a particular task has been completed. However, there are about a dozen rows listing things you need 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		Click to add a note
Review Functional Specs		Click to add a note
Verify Fix Bugs		Finish assigned doc bugs.
Run Annotation Report		Click to add a note
Run Analysis		Scan for critical issues.
Search Output &Test		Click to add a note
Check Troubleshooting Top...		Click to add a note
Replace Images		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.



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



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.

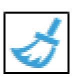
9. Click either **Save** (to save the template and keep the dialog open) or **Save and Close** (to save the template and close the dialog). The template name appears on the left side of the interface. It will also now be available in the Create Checklist dialog.

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

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).

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

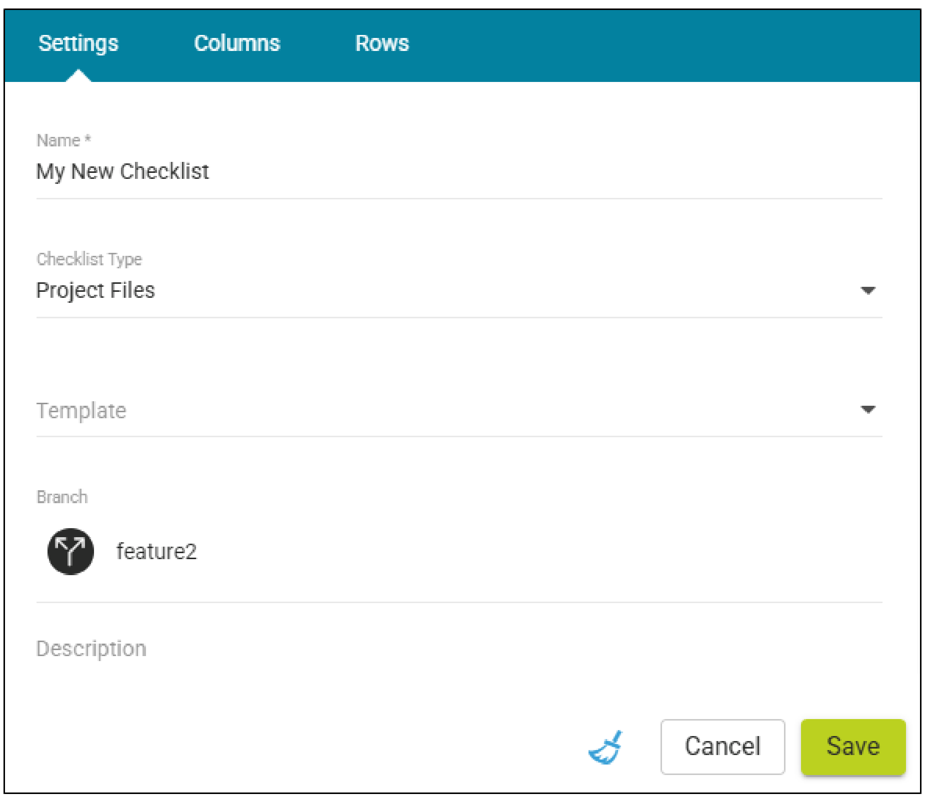
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. On the left side of the dialog, select the checklist template you want to delete.
5. Click .
6. In the dialog that opens,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



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

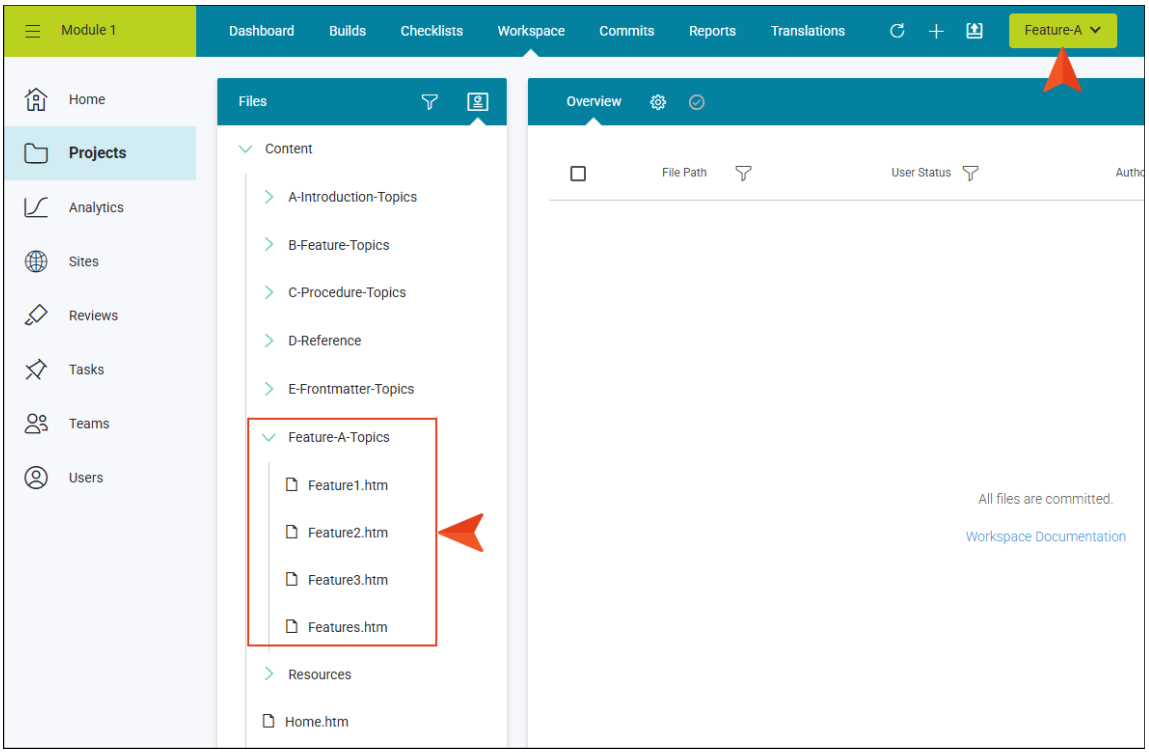
What's Noteworthy? 55

How to Create a Checklist for a Specific Branch

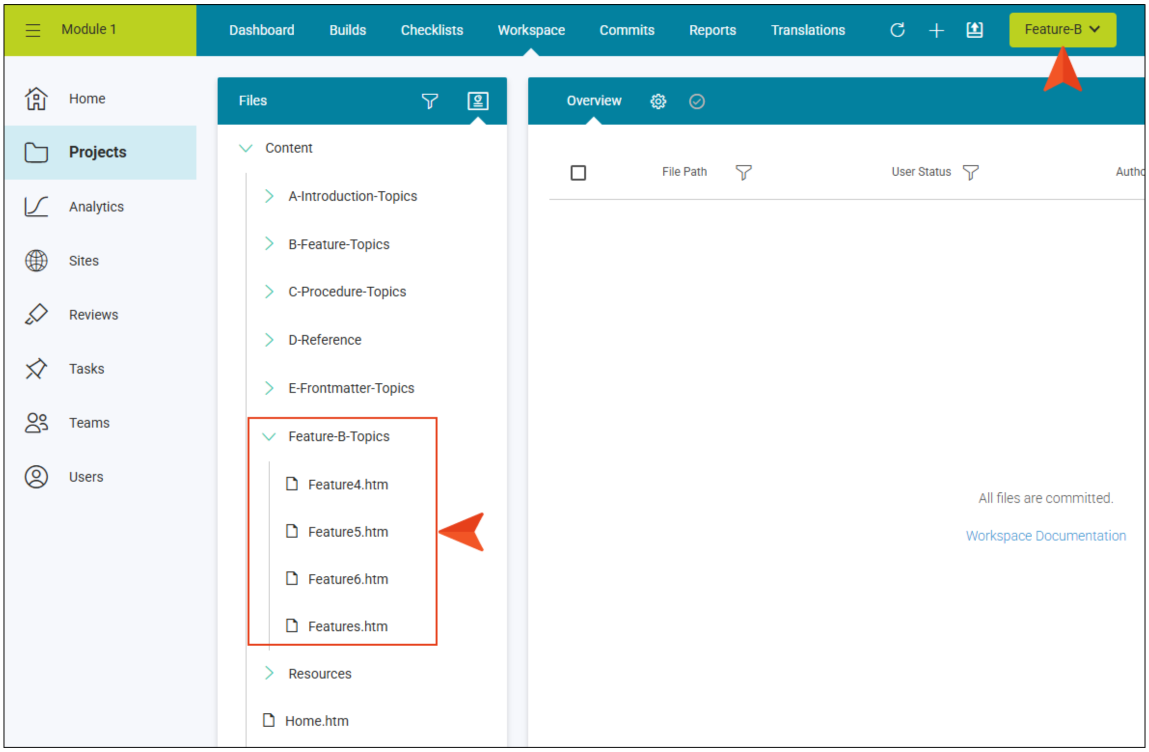
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the interface, click **Checklists**.
3. In the toolbar click .
4. On the **Settings** tab, give the checklist a **Name** and make sure the **Checklist Type** is **Project Files**.
5. From 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.

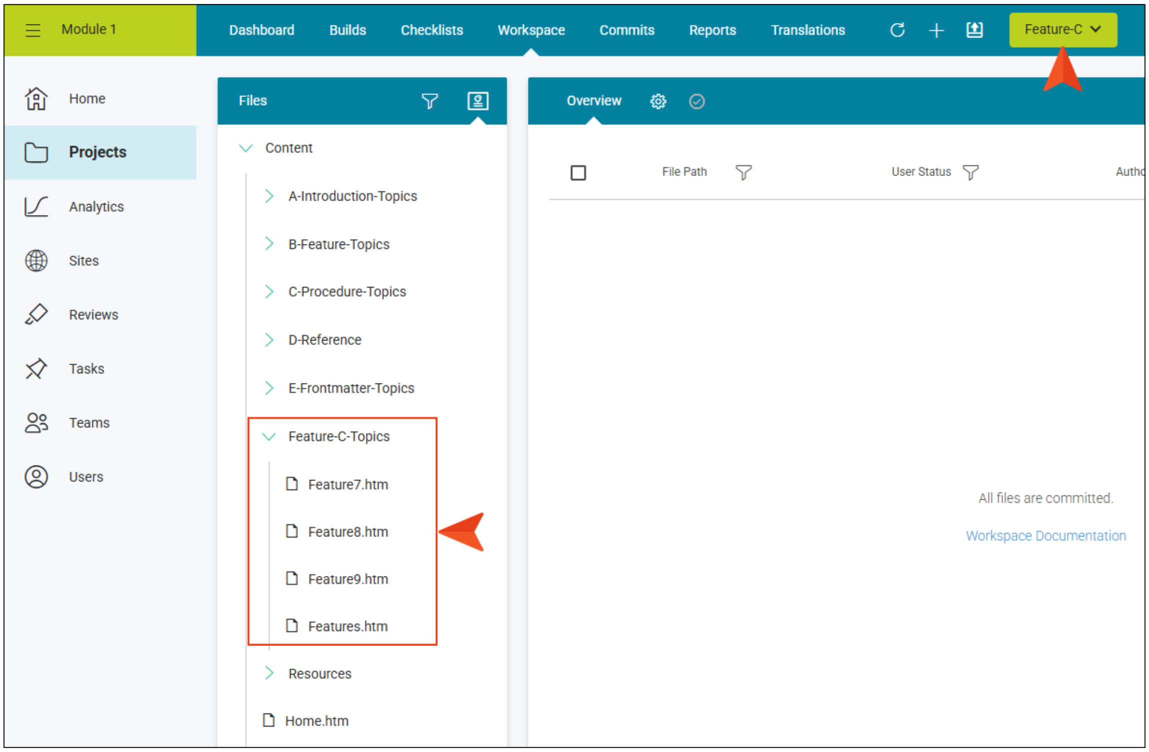
EXAMPLE Your company's product is on version 5.0, and the initial plan is to add Feature A, Feature B, and Feature C in the new, upcoming release of version 6.0. Therefore, in Flare Desktop you create a branch called "Feature-A," another called "Feature-B," and a third called "Feature-C." You synchronize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

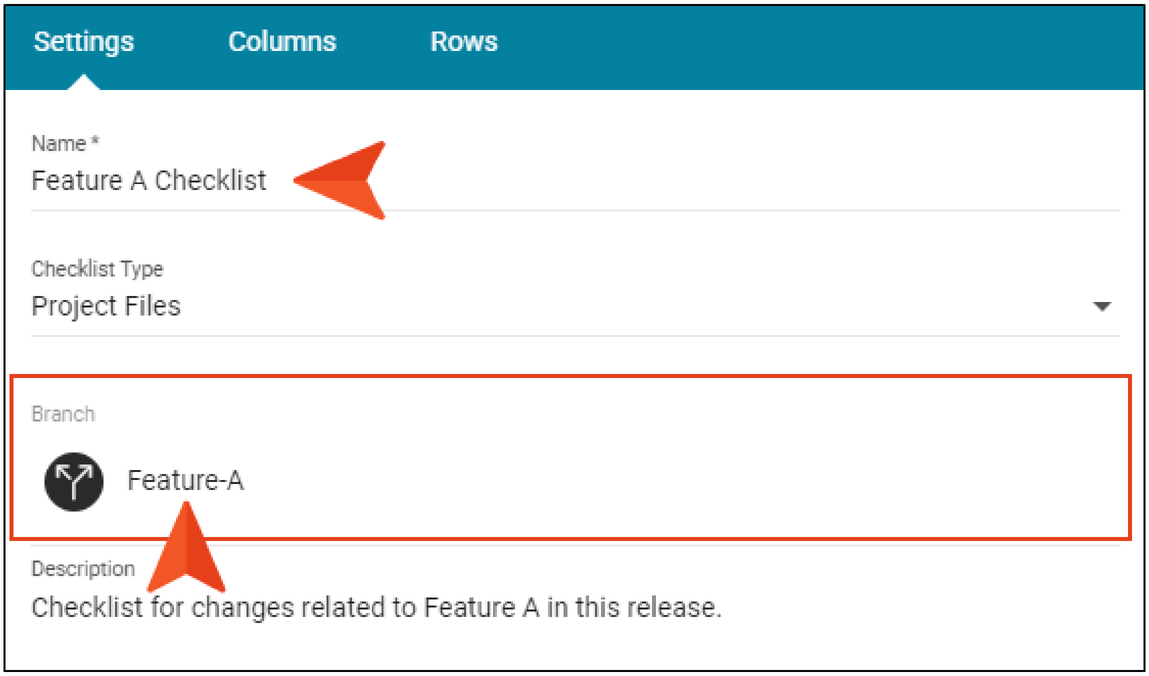




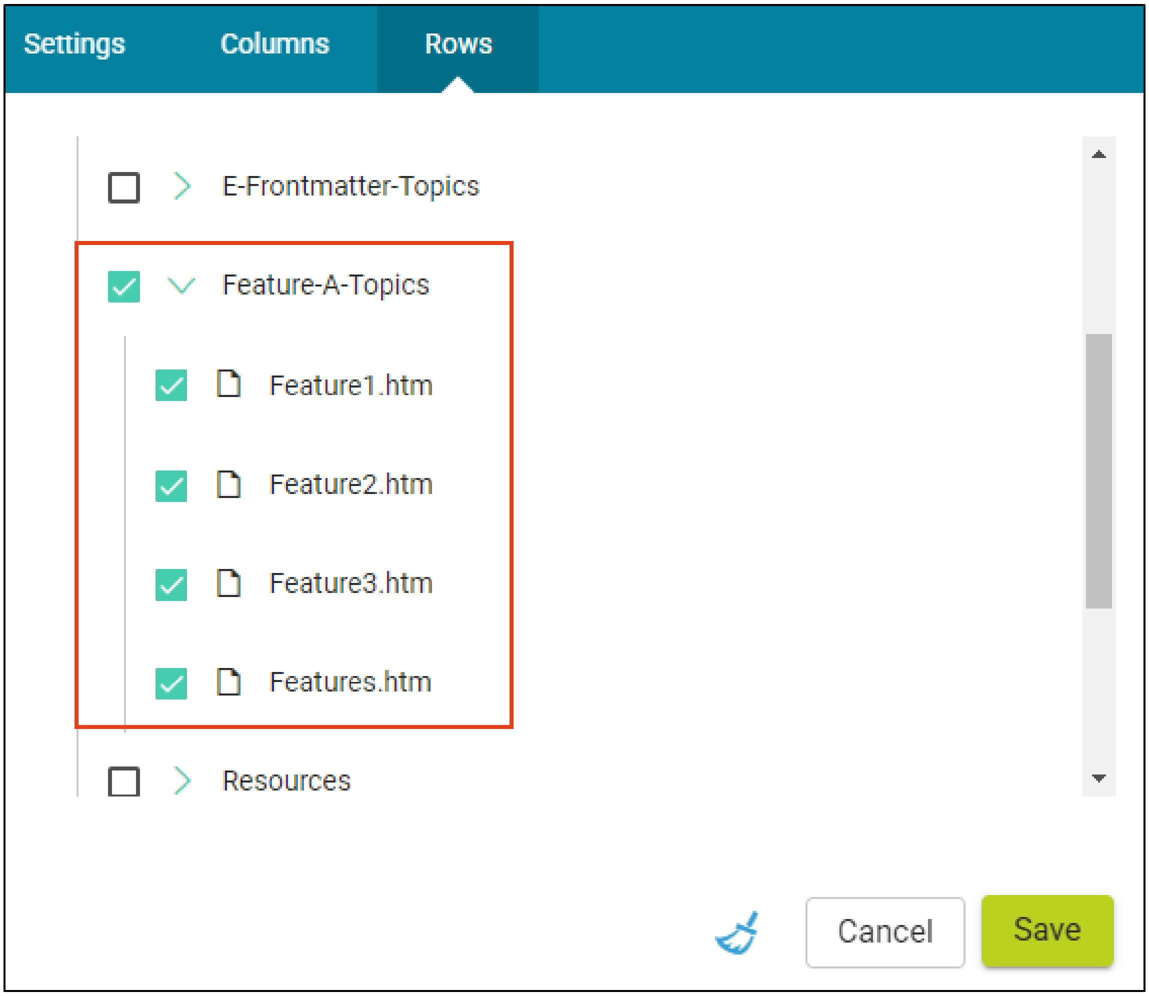
There are many new topics and other files that you eventually end up adding for each of these branches, and there are several existing files that you update for each one as well. In addition, there are many tasks (e.g., edit, add to table of contents, spell check, review) that you want to keep track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

You need some checklists.

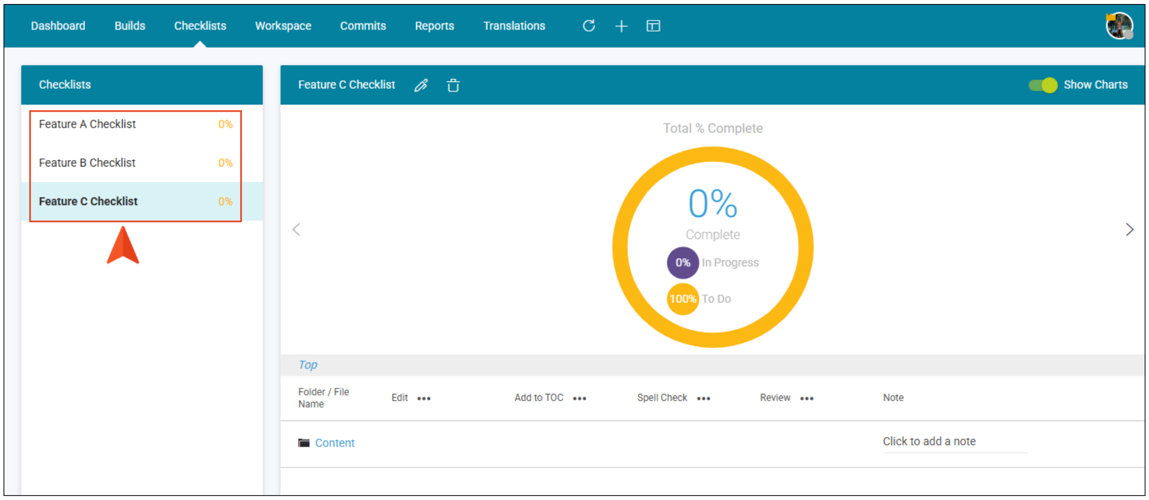
In Flare Online, you create a new topic checklist called "Feature A Checklist," and you select the Feature-A branch when adding that checklist.



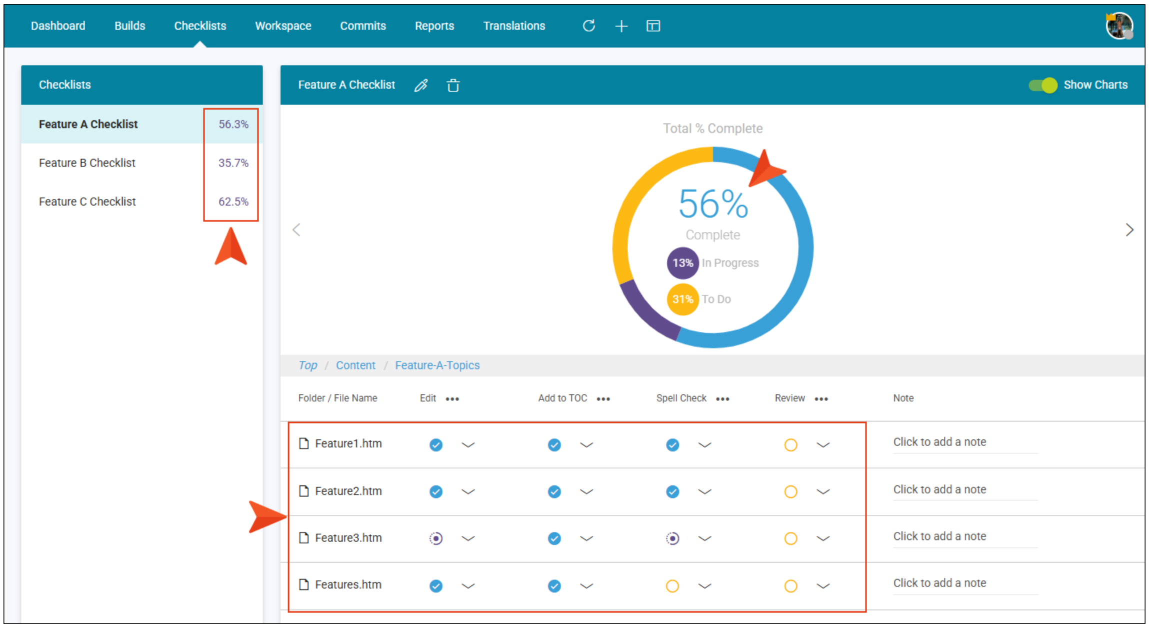
For that checklist, you select many topics that are associated with the documentation of that new feature.



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.



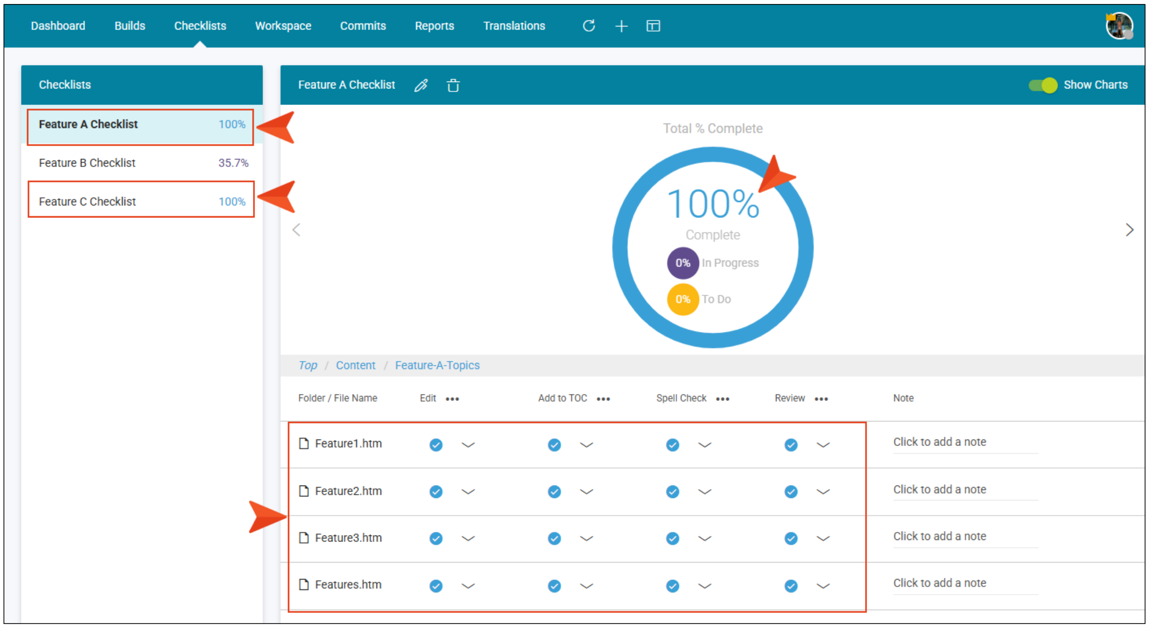
As you continue to work on the documentation for each feature in the appropriate branches, you update each of the three checklists as necessary to track your progress.



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.



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