

MADCAP FLARE ONLINE

Getting Started Guide

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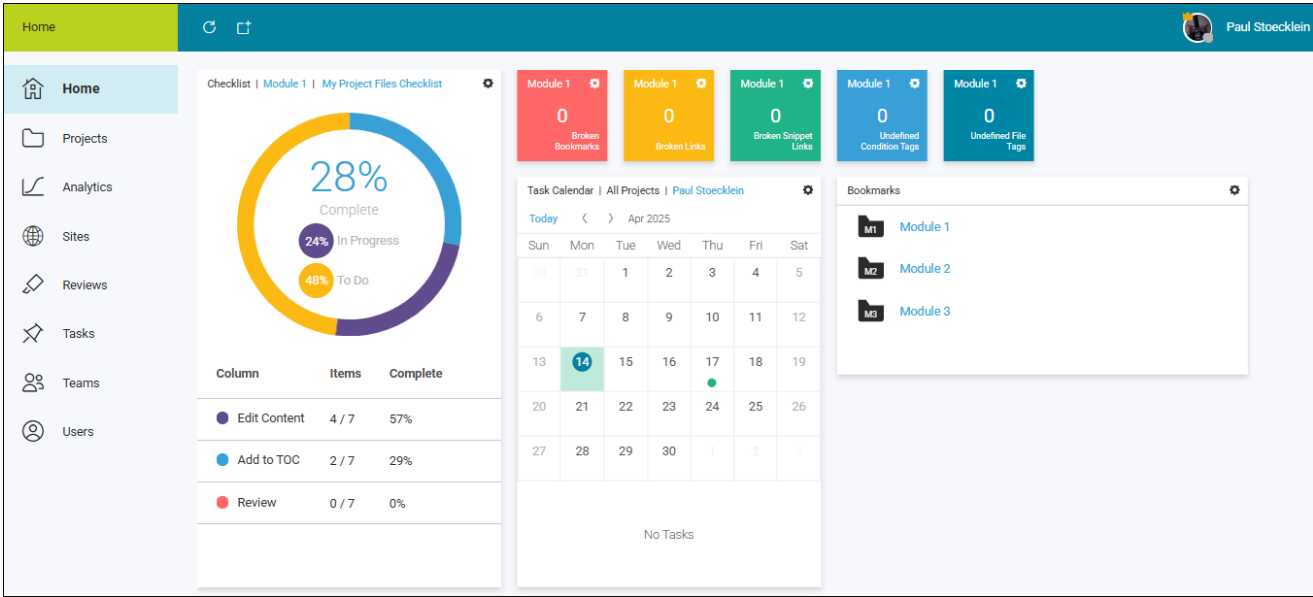
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CHAPTER 1

Introduction

MadCap Flare Online is a cloud-based platform that lets you plan, track, and manage the processes, content, and teams that are at the heart of your organization. It is especially ideal for MadCap Flare Desktop users, but even non-Flare Desktop users can take advantage of MadCap Flare Online.



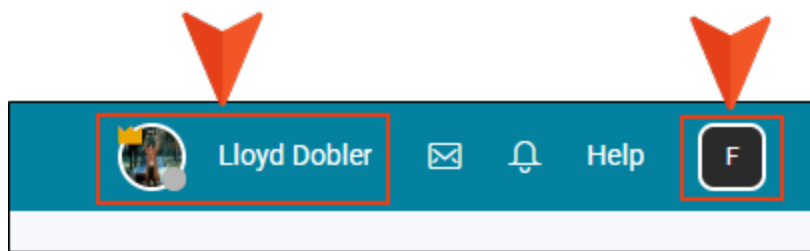
This guide discusses the following:

- **Interface** Take a quick look at the basic areas of the interface, especially the main navigation framework. See "Interface" on page 7.
- **Users and Permissions** Learn about inviting users to your license and setting permissions to control what each person is allowed to do. See "Users and Permissions" on page 15.
- **Teams** Discover how you can organize users on your license into teams. See "Teams" on page 21.
- **Projects and Builds** See how you can create projects directly in Flare Online, upload projects, associate users with them, and manage builds (output). See "Projects and Builds" on page 24.
- **Sites** Learn about using sites to manage your output (live and/or private), as well as the domains (URLs) for accessing the output. See "Sites" on page 42.
- **Analytics** View user activity on published HTML5 output. See "Analytics" on page 43.
- **Reviews** Take a look at how you can view, edit, and manage Flare review files. See "Reviews" on page 44.
- **Tasks** Understand how tasks can help you manage your workload and processes. See "Tasks" on page 47.
- **Widgets** Learn how to insert information objects (widgets) into your Home and Project dashboards. See "Widgets" on page 63.

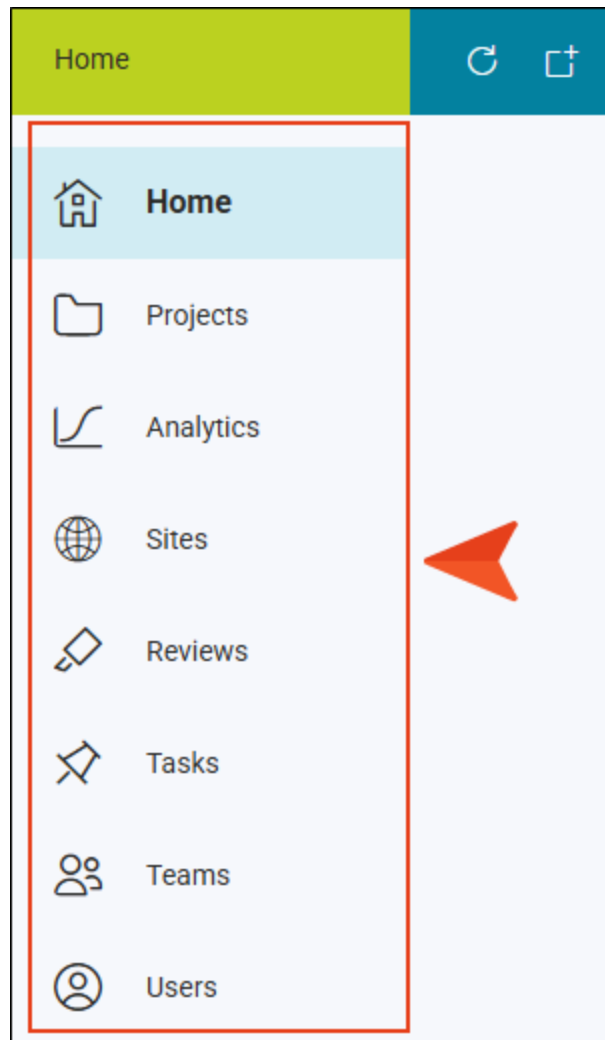
CHAPTER 2


Interface


After you first log in to Flare Online, you will see your name at the top, and the avatar (or initial) representing your license is on the right side. If you are a user on more than one license, you can click it to switch between licenses without signing out.



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



 **NOTE** If you are a subject matter expert (SME), rather than a Flare author, you will only see the Reviews page.

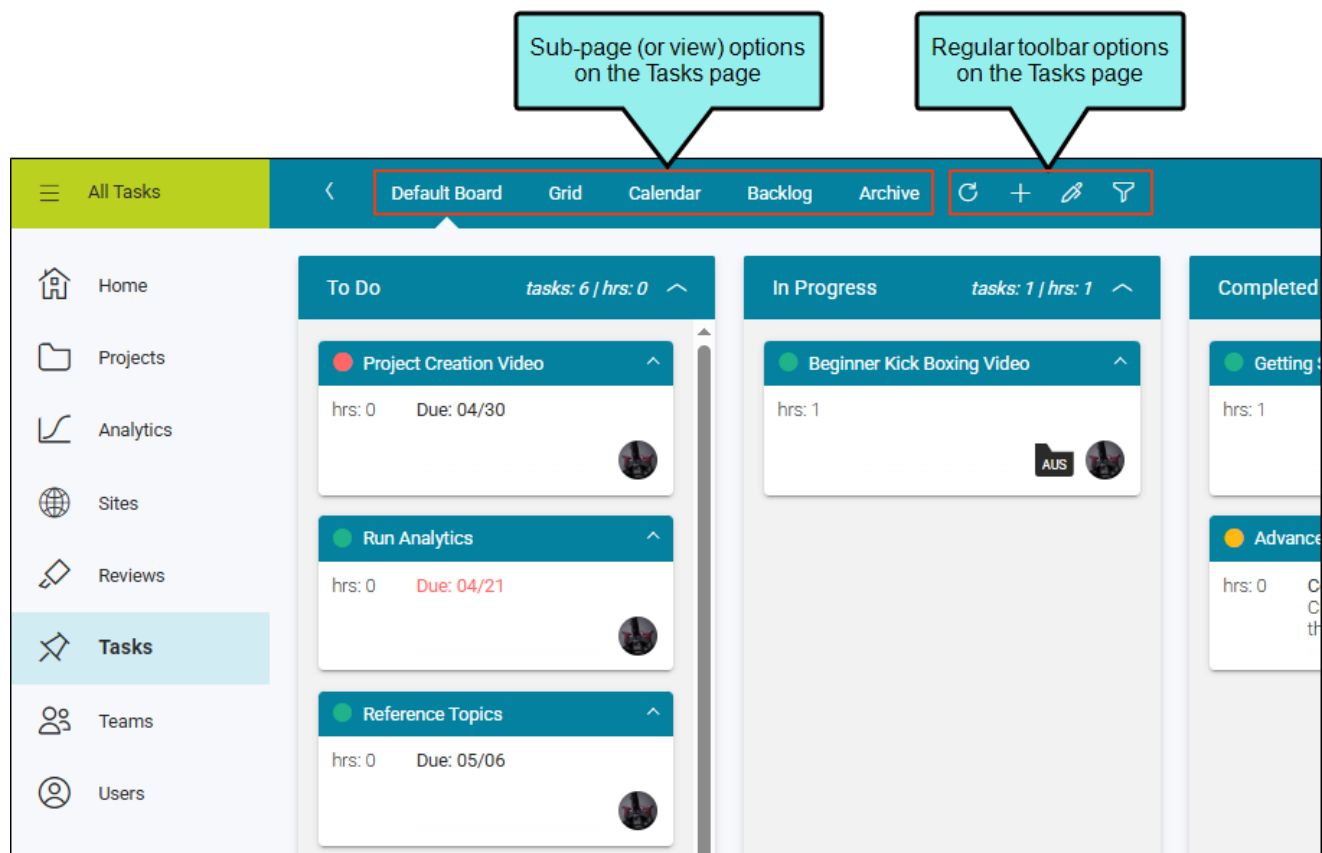
Your Home dashboard is initially empty, but you can add widgets to it by clicking  at the top. Widgets provide a quick glance of various types of information throughout your system. See "Widgets" on page 63.

Each page in Flare Online has a toolbar that lets you add, manage, and remove information on that page. Some pages—such as Projects and Tasks—have additional options at the very top of the interface, which let you see different sub-pages (or views).

Regular toolbar options on the Teams page

The screenshot shows the 'Teams' page in Flare Online. On the left is a sidebar with navigation links: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams (highlighted), and Users. The main content area has a toolbar at the top with a dropdown menu set to 'All Teams', followed by icons for refresh, add user, delete, and settings. Below the toolbar is a table listing teams. The 'Module2 Team' is selected, indicated by a green checkmark in the first column. The table columns are: checkbox, three dots, Name, filter icon, Users, Projects, and Sites.

		Name	Users	Projects	Sites
<input type="checkbox"/>	⋮	NT New Team	CS	MOD	MOD
<input type="checkbox"/>	⋮	MC My Cool Team	WS	...	HTM
<input type="checkbox"/>	⋮	P PrivateOutputs	WS	...	HTM
<input type="checkbox"/>	⋮	Management Team	CS		FLA
<input type="checkbox"/>	⋮	Module3 Team	CS		FLA
<input checked="" type="checkbox"/>	⋮	Module2 Team	CS		FLA
<input type="checkbox"/>	⋮	Module1 Team	...		MOD FLA



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

Notice that these options on the Users page are disabled.

	Name	Seat Type
<input type="checkbox"/>		
<input type="checkbox"/>	Beatrix Kiddo	SME
<input type="checkbox"/>	Clarice Sterling	Author
<input type="checkbox"/>	Jack Frost	Author
<input type="checkbox"/>	Roger Hershey	Author
<input type="checkbox"/>	Inigo Montoya	Author
<input type="checkbox"/>	John Harkins	Author

That's because none of the rows have yet been selected.

Users

Home

Projects

Analytics

Sites

Reviews

Tasks

Teams

Users

1 user selected

Name

Seat Type

☐

Beatrix Kiddo

SME

☐

CS

Clay

☒

JF

Jacob

☐

Roger Hershey

Author

☐

Inigo Montoya

Author

☐


John Harkins

Author

Now that one or more rows have been selected, the options above are enabled.

Responsive Interface

The Flare Online interface is responsive, which means that the elements of the workspace shift automatically when you move from a large screen to a smaller one, or from a high-resolution monitor to a low-resolution display.

If you are working on a small screen or at a low resolution, you will notice that the main navigation and some elements are moved into a flyout pane, which you can open by clicking  in the upper-left corner. This leaves the primary areas of focus in view, but also makes other options easily accessible.



The screenshot shows a project management application interface. On the left is a vertical flyout menu with the following items: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, Activity, What's New!, All Tasks, My Tasks, and Branding. The top navigation bar includes tabs for Default Board, Grid, Calendar, Backlog, and Archive, along with icons for refresh, add, edit, and filter. The user profile 'Lloyd Dobler' is visible in the top right.

The main content area displays a calendar for April 2025. The calendar grid shows days from Sunday to Saturday. Red circles with numbers indicate task counts for each day. For example, on Sunday the 13th, there are 2 tasks. On Monday the 14th, there are 2 tasks. On Tuesday the 15th, there are 3 tasks. On Wednesday the 16th, there are 3 tasks. On Thursday the 17th, there are 3 tasks. On Friday the 18th, there are 3 tasks. On Saturday the 19th, there are 2 tasks. On Sunday the 20th, there are 2 tasks. On Monday the 21st, there are 2 tasks. On Tuesday the 22nd, there are 2 tasks. On Wednesday the 23rd, there are 2 tasks. On Thursday the 24th, there are 2 tasks. On Friday the 25th, there are 3 tasks. On Saturday the 26th, there are 3 tasks. On Sunday the 27th, there are 3 tasks. On Monday the 28th, there are 3 tasks. On Tuesday the 29th, there are 3 tasks. On Wednesday the 30th, there are 1 task. On Thursday the 1st, there are 1 task. On Friday the 2nd, there are 1 task. On Saturday the 3rd, there are 1 task.

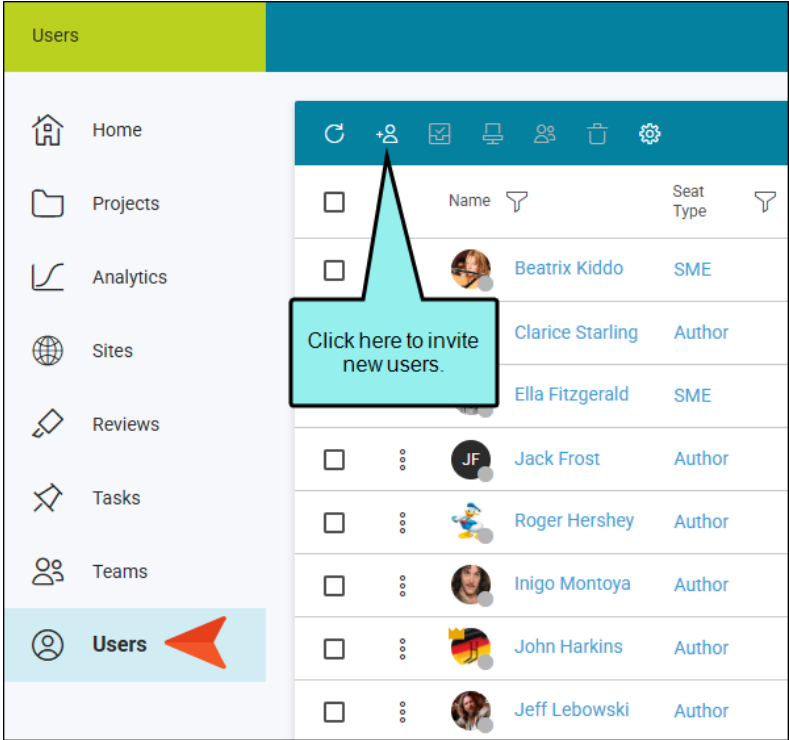
Three callout boxes provide additional information:

- Callout 1:** From the flyout menu, you can open any of the other main pages.
- Callout 2:** You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
- Callout 3:** This is where you will also find the options to switch between all tasks and just your own tasks.

CHAPTER 3

Users and Permissions

The first person to log in to MadCap Flare Online using your company's license has “User Administration” permission. From the Users page, this person can invite other individuals to join the license.



You can add multiple kinds of users.

- **Author** An author is an individual who works in projects, creating and editing content. This person can also be the "owner" of a review when they send topics and snippets that need to be reviewed by others. Owners can assign other reviewers with the author seat type and permission to manage reviews. Authors can monitor reviews, access grids for information and progress, and create review packages directly in Flare Online. Along with the reviewers, the author can open and edit files in the Review Editor. Authors with the appropriate permissions can send a project out for translation. They can also create and edit content in Flare Online via the project Workspace page.
- **Subject Matter Expert** A subject matter expert (SME) is an individual whose main purpose in Flare Online is to review topics and/or snippets sent by an author. Therefore, a SME only sees the parts of the Flare Online user interface that are necessary for reviews.
- **Viewer** A viewer is an individual whose only role is to view live private output. These users do not even need to belong to your company. However, they must set up a Flare Online password; not to access Flare Online itself, but to see live private outputs with which they are associated. Viewers can also see live output that is not set as private, just as anyone in the general public can. So if you do not need private output, you do not need to invite viewers to the license.



NOTE A person who has the author user type can function as either the owner (i.e., original author) or a reviewer during the review process.

You can invite users one at a time or in bulk by pointing to a CSV file containing each person's email, first name, then last name. If you do not yet have a CSV file, you can download a template from Flare Online and complete it with your users' details.

A screenshot of the 'Invite User' dialog box in Flare Online. The dialog has a blue header with a close button (X) in the top right. Below the header is a progress bar with six steps: 1 Start, 2 User Type (Author), 3 CSV File, 4 Permissions, 5 Teams (Optional), and 6 Summary. Step 3 is currently active. The main content area is white and contains the following text: 'Download the [template](#) CSV file. Then click the button below and select the file. For more information, [click here](#).' Below this text is a red arrow pointing to a blue button labeled 'Select Your File *'. At the bottom of the dialog, there is a line of text: 'No more than 1,000 rows are allowed per CSV file.'

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

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

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

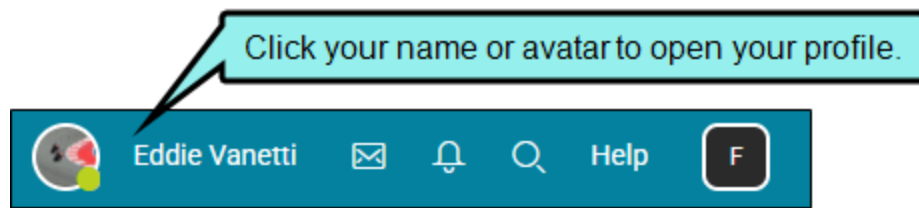
When a new user is invited, that person receives an email. The individual must click a link to complete the invitation to Flare Online. This allows the user to confirm or edit his or her name, and set up a password. After the user submits the information, the account is activated.


From the Users page, you can see all other users in the system, view their profiles, and contact them. Users with a crown icon have “User Administration” permission.

The screenshot shows a table of users in the Flare Online system. The table has columns for a selection checkbox, a menu icon, an avatar, a name, and a seat type. The users listed are Beatrix Kiddo (SME), Clarice Starling (Author), Ella Fitzgerald (Author), Jack Frost (Author), Roger Hershey (Author), Inigo Montoya (Author), and John Harkins (Author). A callout labeled "User Admin" points to the crown icon next to Clarice Starling's name. Another callout points to her name and avatar, stating: "Click a user's name or avatar to see the profile. From here you can send that person a message, change permissions, and more."

		Name	Seat Type
<input type="checkbox"/>		Beatrix Kiddo	SME
<input type="checkbox"/>		Clarice Starling	Author
<input type="checkbox"/>		Ella Fitzgerald	Author
<input type="checkbox"/>		Jack Frost	Author
<input type="checkbox"/>		Roger Hershey	Author
<input type="checkbox"/>		Inigo Montoya	Author
<input type="checkbox"/>		John Harkins	Author

If you click your avatar or name at the top of the interface, your profile opens.






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Settings

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

Profile

Avatar



Change Delete

First Name *

Eddie

Last Name *

Vanetti

Initials (no avatar) *

EV

Title

Phone

(123) 456-7890

Cell Phone

(123) 098-7654

Location

La Jolla, CA

Department

R&D

Secondary

Cancel

Save

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

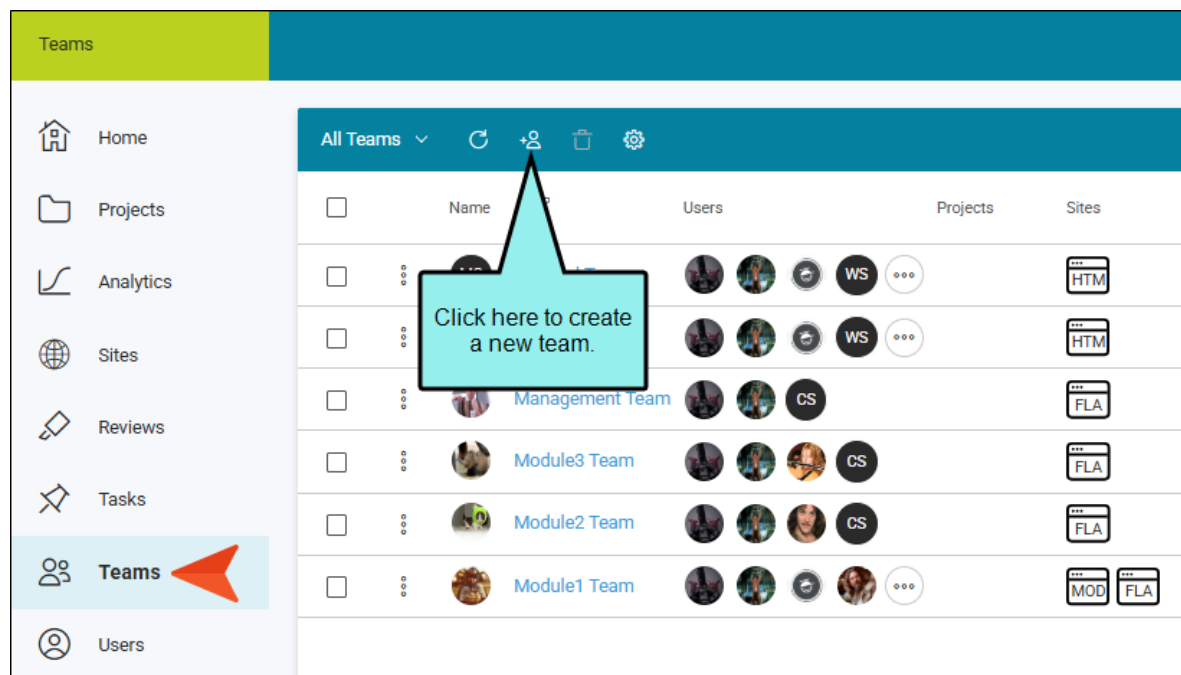


NOTE The notifications feature is available for author user types only, not for SMEs or viewers.

CHAPTER 4

Teams

The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects, as well as to give users permissions on the license. Teams are also important if you produce private output, because only members of a team that is associated with the private site can view that output.



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

Create Team

1 Team Settings
New Team

2 Permissions
Partial

3 Users
3 users

4 Projects

5 Sites

6 Summary

Select All

- ☐ Alfie Vong
- ☐ Beatrix Kiddo
- ☒ CS Clarice Starling
- ☐ Eddie Vanetti
- ☒ Ella Fitzgerald
- ☐ Inigo Montoya
- ☐ JF Jack Frost
- ☒ Jeff Lebowski
- ☐ John Harkins

Back Next

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

Teams						
<div><div>Home</div><div>Projects</div><div>Analytics</div><div>Sites</div><div>Reviews</div><div>Tasks</div><div>Teams</div><div>Users</div></div>	All Teams <div></div> <div></div> <div></div> <div></div>					
	<input type="checkbox"/>	Name	<div></div>	Users	Projects	Sites
	<input type="checkbox"/>	<div></div> NT New Team		<div></div> <div></div> CS	<div>MOD</div>	<div>MOD</div>
	<input type="checkbox"/>	<div></div> MC My Cool Team		<div></div> <div></div> WS <div></div>		<div>HTM</div>
	<input type="checkbox"/>	<div></div> P PrivateOutputs		<div></div> <div></div> WS <div></div>		<div>HTM</div>
	<input type="checkbox"/>	<div></div> Management Team		<div></div> <div></div> CS		<div>FLA</div>
	<input type="checkbox"/>	<div></div> Module3 Team		<div></div> <div></div> CS		<div>FLA</div>
	<input type="checkbox"/>	<div></div> Module2 Team		<div></div> <div></div> CS		<div>FLA</div>
	<input type="checkbox"/>	<div></div> Module1 Team		<div></div> <div></div> <div></div> <div></div> <div></div>		<div>MOD</div> <div>FLA</div>

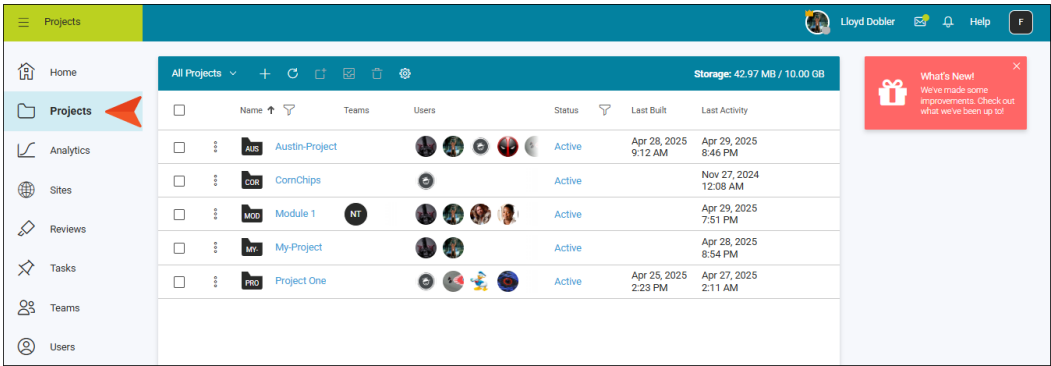
CHAPTER 5

Projects and Builds

The Projects page displays a grid, which lists all projects that have been created in Flare Online or uploaded to your Flare Online license. Creating a project using Flare Online’s UI is a convenient way to make basic projects in the cloud. Users associated with the project can always import it later from Flare Online to Flare Desktop if more advanced features are needed.

Uploaded projects are copies of the local projects located on users’ desktops. Some reasons to upload (i.e., bind) projects to Flare Online, are the following: (1) You can let Flare Online build and host your output, which means you can publish without having to involve an IT department; (2) the connection between your local project files in Flare Desktop and the cloned files in Flare Online can be used as a source control solution, with branching integrated in various places in Flare Online; and (3) you can use Flare Online as a platform for topic reviews.

Regardless of whether you create a project in Flare Online or upload it, you can do the following: (1) collaboratively author, add, and edit project files directly in Flare Online, with the ability to tap into the power of ChatGPT; (2) manage progress on topic development by using checklists; and (3) create a translation branch, using MadTranslations or a third-party language service provider to get translations done.

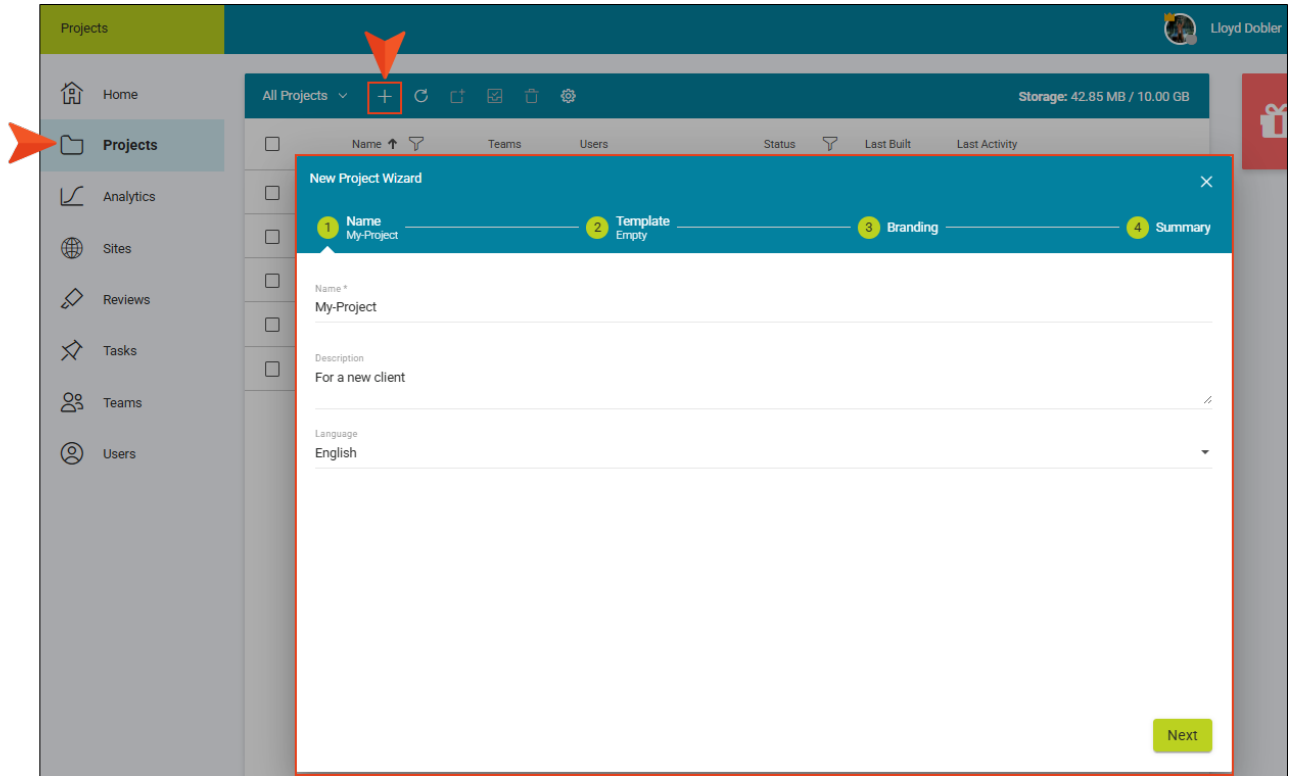


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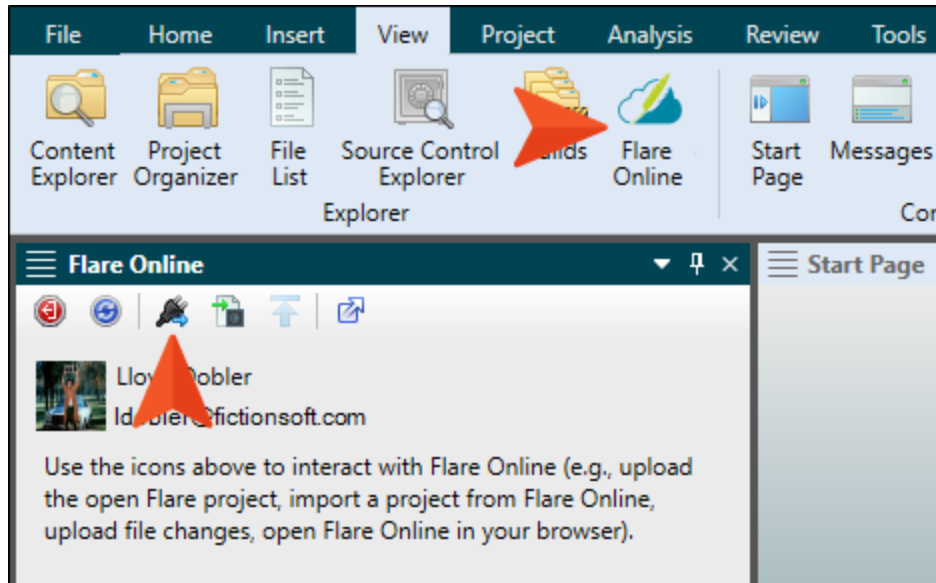
Creating Projects

You can create projects from scratch directly in Flare Online; eliminating the need to interact with Flare Desktop. This centralized workflow is ideal for basic projects, or for keeping project management simple.



Uploading Projects

You do not upload projects from within Flare Online. Instead, you do this from the desktop project itself, using a recent version of Flare Desktop that supports it.

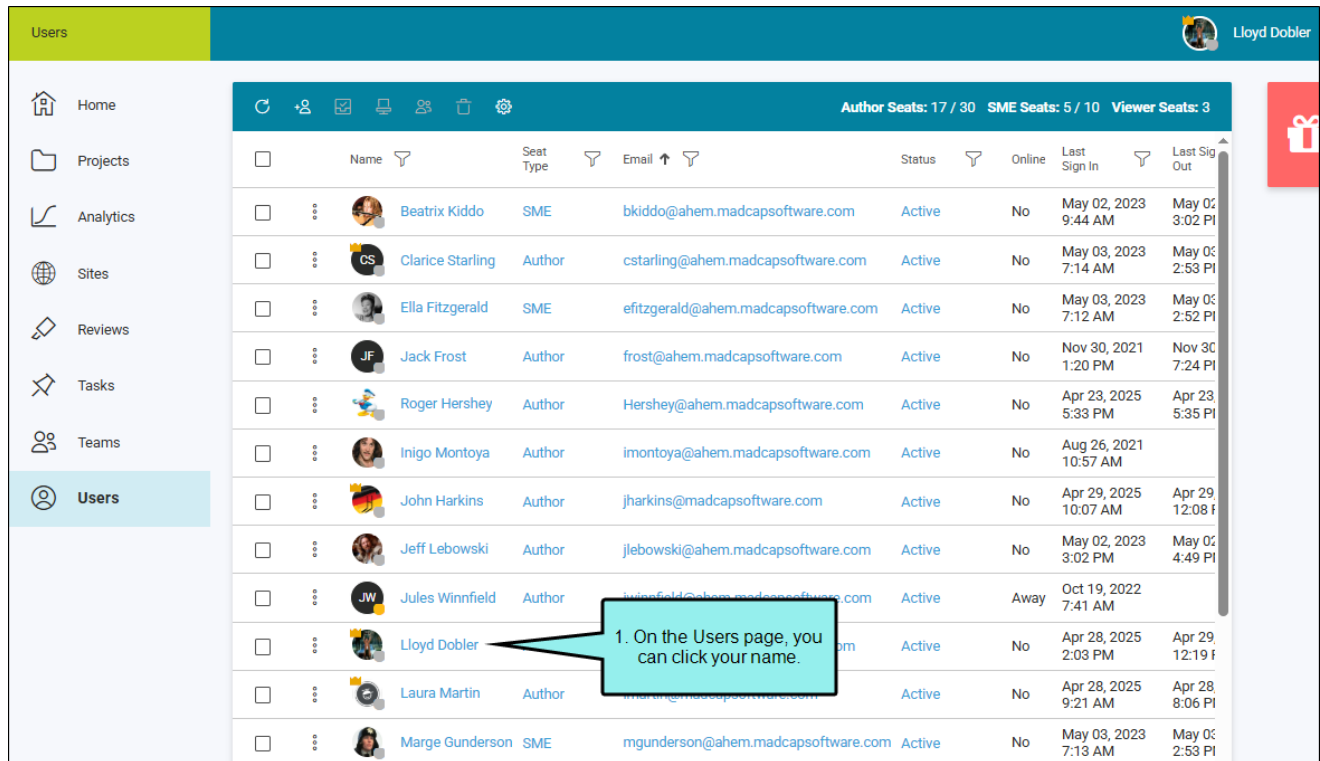


IMPORTANT Flare Online is not a replacement for Flare Desktop. You can continue to author your project content locally in Flare Desktop. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project in Flare Online. If you are working in a dual-bound model, you use your normal (third-party) source control tool to synchronize your files and then use Flare Desktop to push those changes to Flare Online. Whichever method you use, this ensures that your files are up-to-date in Flare Online before you build output.

NOTE When you upload a project to Flare Online, the files are connected to Flare Online via an integrated source control system (Git). Your interaction with source control can follow one of two models—single-bound (recommended) or dual-bound. For more information, see the Help system or the *Projects and Builds Guide*.


Associating Users With Projects

All users can see all the projects listed in the grid on the Projects page. However, to open a project (by clicking on its name) or take action on it, you must be associated with that project. There are a few ways to become associated with a project. First, you can upload a project to Flare Online yourself. Second, another user can add you to his or her project. Third, if you have “Manage Teams and Projects” permission, you can open your profile and add yourself to a project. And fourth, if another user sends files from a project for you to review, you will automatically become associated with that project.



The screenshot shows the 'Users' page in the Flare Online interface. The page has a sidebar on the left with navigation links: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, and Users (highlighted). The main content area displays a table of users. At the top right of the table, there are seat counts: Author Seats: 17 / 30, SME Seats: 5 / 10, and Viewer Seats: 3. The table columns are: Name, Seat Type, Email, Status, Online, Last Sign In, and Last Sign Out. A callout box points to the user 'Lloyd Dobler' with the text '1. On the Users page, you can click your name.'

Name	Seat Type	Email	Status	Online	Last Sign In	Last Sign Out
Beatrix Kiddo	SME	bkiddo@ahem.madcapsoftware.com	Active	No	May 02, 2023 9:44 AM	May 02, 2023 3:02 PM
Clarice Starling	Author	cstarling@ahem.madcapsoftware.com	Active	No	May 03, 2023 7:14 AM	May 03, 2023 2:53 PM
Ella Fitzgerald	SME	efitzgerald@ahem.madcapsoftware.com	Active	No	May 03, 2023 7:12 AM	May 03, 2023 2:52 PM
Jack Frost	Author	frost@ahem.madcapsoftware.com	Active	No	Nov 30, 2021 1:20 PM	Nov 30, 2021 7:24 PM
Roger Hershey	Author	Hershey@ahem.madcapsoftware.com	Active	No	Apr 23, 2025 5:33 PM	Apr 23, 2025 5:35 PM
Inigo Montoya	Author	imontoya@ahem.madcapsoftware.com	Active	No	Aug 26, 2021 10:57 AM	
John Harkins	Author	jharkins@madcapsoftware.com	Active	No	Apr 29, 2025 10:07 AM	Apr 29, 2025 12:08 PM
Jeff Lebowsky	Author	jlebowsky@ahem.madcapsoftware.com	Active	No	May 02, 2023 3:02 PM	May 02, 2023 4:49 PM
Jules Winnfield	Author	jwinnfield@ahem.madcapsoftware.com	Active	Away	Oct 19, 2022 7:41 AM	
Lloyd Dobler	Author	ldobler@ahem.madcapsoftware.com	Active	No	Apr 28, 2025 2:03 PM	Apr 29, 2025 12:19 PM
Laura Martin	Author	lmartin@madcapsoftware.com	Active	No	Apr 28, 2025 9:21 AM	Apr 28, 2025 8:06 PM
Marge Gunderson	SME	mgunderson@ahem.madcapsoftware.com	Active	No	May 03, 2023 7:13 AM	May 03, 2023 2:53 PM



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⚙ Settings

🔒 Password

➔ **Access**

🚀 Assign New Task

🕒 Activity

☰ Permissions

🔔 Notifications

✕ Deactivate

🗑 Delete


Access

> Teams (6)

> Projects (3)

Edit

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



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Settings

Password

Access

Assign New Task

Activity

Permissions

Notifications

Deactivate

Delete


Access

> Teams (6)

> Projects (3)

Edit

3. Click **Edit**.



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Settings

Password

Access

Assign New Task

Activity

Permissions

Notifications


Deactivate


Delete


Access


> ☒ Teams


✓ ☐ Projects

☒  Austin-Project

☐  CornChips

☒  Module

☒  My-Project


☐  Project One















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


Cancel










Save

There is also a drop-down on the Projects page that lets you switch between seeing all projects and only the projects you are associated with.



All Projects ▾ + ↺ 📄 📧 🗑 ⚙ Storage: 48.11 MB / 10.00 GB									
<input type="checkbox"/>		Name ↑ ▾	Teams	Users	Status ▾	Last Built	Last Activity		
<input type="checkbox"/>	⋮	AUS Austin-Project		    	Active	Apr 28, 2025 9:12 AM	Apr 28, 2025 5:20 PM		
<input type="checkbox"/>	⋮	COR CornChips			Active		Nov 27, 2024 12:08 AM		
<input type="checkbox"/>	⋮	MOD Module		 	Active	Apr 28, 2025 9:00 PM	Apr 29, 2025 4:00 AM		
<input type="checkbox"/>	⋮	MY- My-Project		 	Active		Apr 28, 2025 8:54 PM		
<input type="checkbox"/>	⋮	PRO Project One		   	Active	Apr 25, 2025 2:23 PM	Apr 27, 2025 2:11 AM		



My Projects ▾ + ↺ 📄 📧 🗑 ⚙ Storage: 48.11 MB / 10.00 GB									
Active Filters My Projects ✕									
<input type="checkbox"/>		Name ↑ ▾	Teams	Users	Status ▾	Last Built	Last Activity		
<input type="checkbox"/>	⋮	AUS Austin-Project		    	Active	Apr 28, 2025 9:12 AM	Apr 28, 2025 5:20 PM		
<input type="checkbox"/>	⋮	MOD Module		 	Active	Apr 28, 2025 9:00 PM	Apr 29, 2025 4:00 AM		
<input type="checkbox"/>	⋮	MY- My-Project		 	Active		Apr 28, 2025 8:54 PM		

Project Dashboard

Once you are associated with a project in Flare Online, you can open it from the main Projects page by clicking on the project name.

When you first open a project in Flare Online, it displays by default in Dashboard view. As with your Home dashboard, it will be empty at first. You can populate each project dashboard with widgets that you find useful. See "Widgets" on page 63.

The screenshot shows the Flare Online Project Dashboard for 'Austin-Project'. The interface includes a top navigation bar with tabs: Dashboard, Builds, Checklists, Workspace, Commits, Reports, and Translations. A left sidebar contains navigation links: Home, Projects (selected), Analytics, Sites, Reviews, Tasks, Teams, and Users. The main content area displays several widgets:

- Checklist | Austin-Project | My Generic Checklist:** A donut chart showing progress: 33% Complete, 50% In Progress, and 17% To Do. Below the chart is a table with columns 'Column', 'Items', and 'Complete'.
- Project Properties | Austin-Project:** A circular progress indicator showing 89% Builds. Text details include: Created: 07/25/24 8:51 AM, Modified: 04/25/25 7:32 PM, Total: 21.83 MB, Builds: 19.38 MB, Project Files: 2.45 MB, Live Sites: 0, and Total Builds: 3.
- Build Activity | Austin-Project:** A table with columns ID, Branch, and Target.

Annotations with callouts provide instructions:

- 1. Click here to open the Project Dashboard:** Points to the 'Dashboard' tab in the top navigation bar.
- We've already added several widgets to this project dashboard:** Points to the existing widgets in the main content area.
- 2. Click this button:** Points to the '+ Add Widgets' button in the top right corner.
- 3. Use this dialog to choose widgets to add:** Points to the 'Add Widgets' dialog box, which lists various widget options with checkboxes.

The 'Add Widgets' dialog box contains the following options:

- ☐ Bookmarks
- ☐ Build Activity
- ☒ Build History
- ☐ Checklist
- ☐ Live Sites
- ☐ Project Properties
- ☐ Reports
- ☒ Task Calendar
- ☐ Task Summary

An 'Add' button is located at the bottom of the dialog.

Builds

You can click **Builds** at the top of the interface to work with the targets in the project. The Builds view lets you generate, open, and manage output from a target. To set output as “live” (i.e., it can be viewed by the public) or configure domains (URLs), you can use the Sites page (see “Sites” on page 42).

The screenshot shows the 'Builds' tab in the Flare Online interface. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Workspace', 'Commits', 'Reports', and 'Translations'. Below this, there's a sub-navigation bar with 'Builds' and 'Schedules'. A 'Create Build' button is visible on the right. The main area displays a table of builds with columns: ID, Branch, Target, Keep, Finished, Duration, State, and Progress. Four builds are listed, with the first one (ID 90206) highlighted. Callouts provide detailed explanations of the interface elements and build status.

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

Click here to generate a new build. You can select a specific branch and target.

Currently, the Builds grid is active, but you can also switch to Schedules to tell Flare Online to automatically generate outputs in the future.

This build is associated with a site for the purpose of setting it as "live," "private," or both.

Select one or more builds to take action on them.

Each build has an autogenerated ID. Click it to open the profile dialog for that build. You can see details and take various actions.

The branch for each build is shown. If you are not using multiple branches, it will display master.

This build has been set as "keep."

Click a build row to expand it and see more information.

This build is associated with a live site.

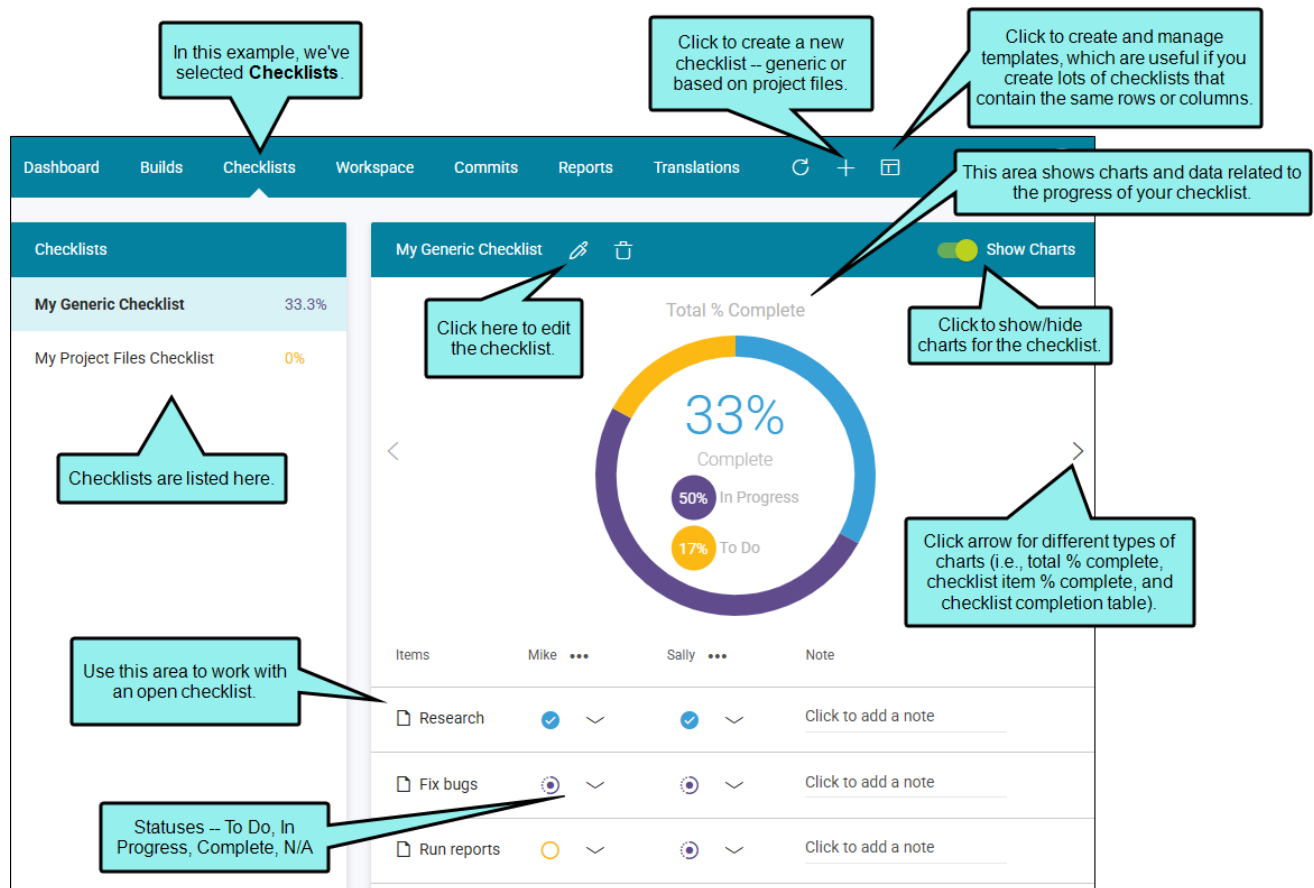
By scrolling to the right, you can see more information, such as who generated a build, whether it originated from Flare Online or Flare Desktop, errors, warnings, and more.

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

Checklists

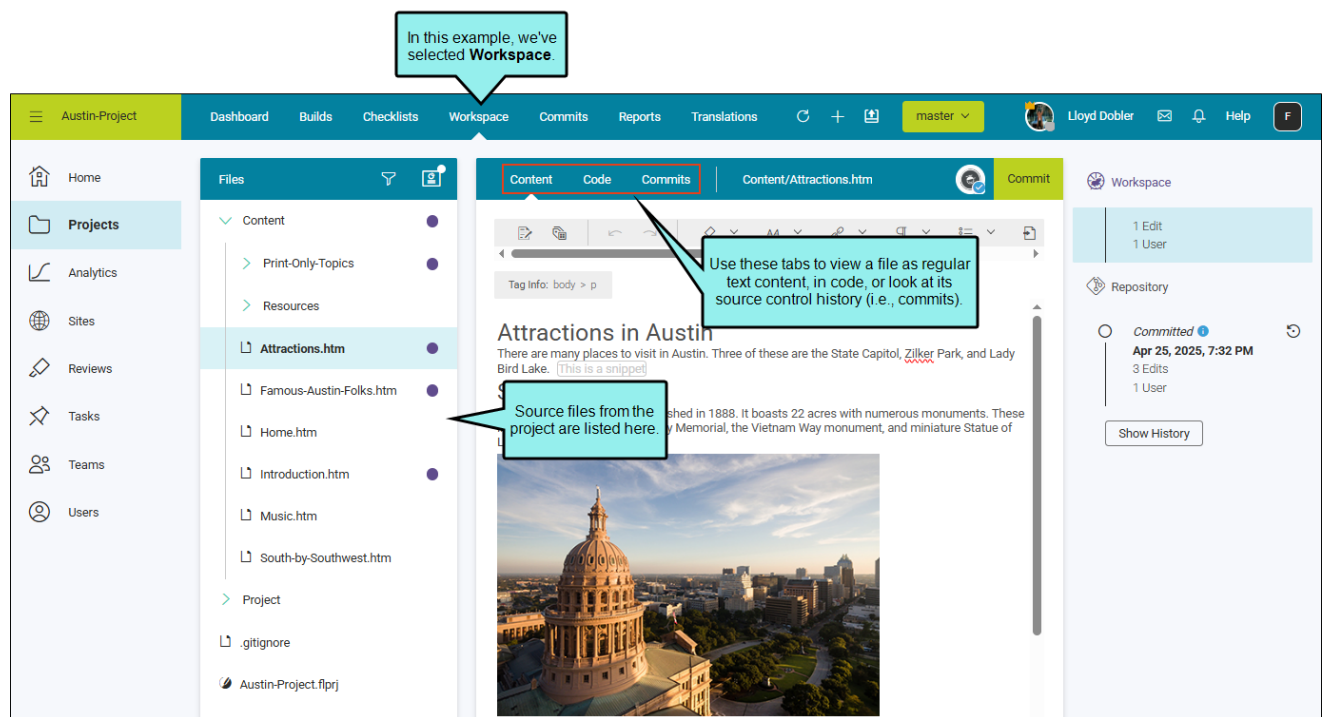
You can click **Checklists** at the top of the interface to create and manage checklists related to your project.

Checklists might have to do with specific files (e.g., topics) in your project. These are called “Project Files” checklists. You can create custom columns for whatever types of activity you want to track for each file, and you can use a note column for specific information about each row. Also, you can associate a Project Files checklist with a specific branch, which is helpful when tracking the progress of content that is in a state of development. Alternatively, you might create checklists for random things you need to accomplish, such as a product release “To Do” list. These are called “Generic” checklists, and they let you manually name each column and row. You can set the appropriate status on each item as you work. At the top of the interface you can select to show charts and percentages as you progress through the checklist.



Workspace

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



Commits

You can click **Commits** at the top of the interface to see details of all the source control changes that have taken place over time for the project.

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

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

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

The screenshot displays the 'Austin-Project' interface. The top navigation bar includes 'Austin-Project', 'Dashboard', 'Builds', 'Checklists', 'Workspace', 'Commits', 'Reports', 'Translations', and a 'master' dropdown. The left sidebar contains 'Home', 'Projects', 'Analytics', 'Sites', 'Reviews', 'Tasks', 'Teams', and 'Users'. The main area is split into two panels: 'Commits' on the left and 'Commit' details on the right. The 'Commits' panel lists several commits, with 'changed text in content.' selected. The 'Commit' panel shows the file 'Content/Attractions.htm' with a diff view. A right sidebar shows 'What's New!', 'Assigned Teams/Users', and 'Project Activity'. Callouts explain the 'Commits' tab, the list of commits, and the commit details view.

Commits List:

- commit snippet
2e9c5b7d 4 days ago by Laura Martin
- remove cond tag
3064c3ee 4 days ago by Laura Martin
- Delete this file.
670fc817 4 days ago by Laura Martin
- New title
24f5616d 4 days ago by Laura Martin
- Changed text in content.
3cb6aef5 4 days ago by Laura Martin
- c
7a890537 13 days ago by Eddie Vanetti
- b
0541480f 13 days ago by Eddie Vanetti
- delete
382044c0 14 days ago by Eddie Vanetti
- new name
0d9a8aac 14 days ago by Eddie Vanetti
- cc
5053bda5 14 days ago by Eddie Vanetti
- new file
0fb8e1cb 14 days ago by Eddie Vanetti
- creating a snippet
670d70e5 14 days ago by Eddie Vanetti

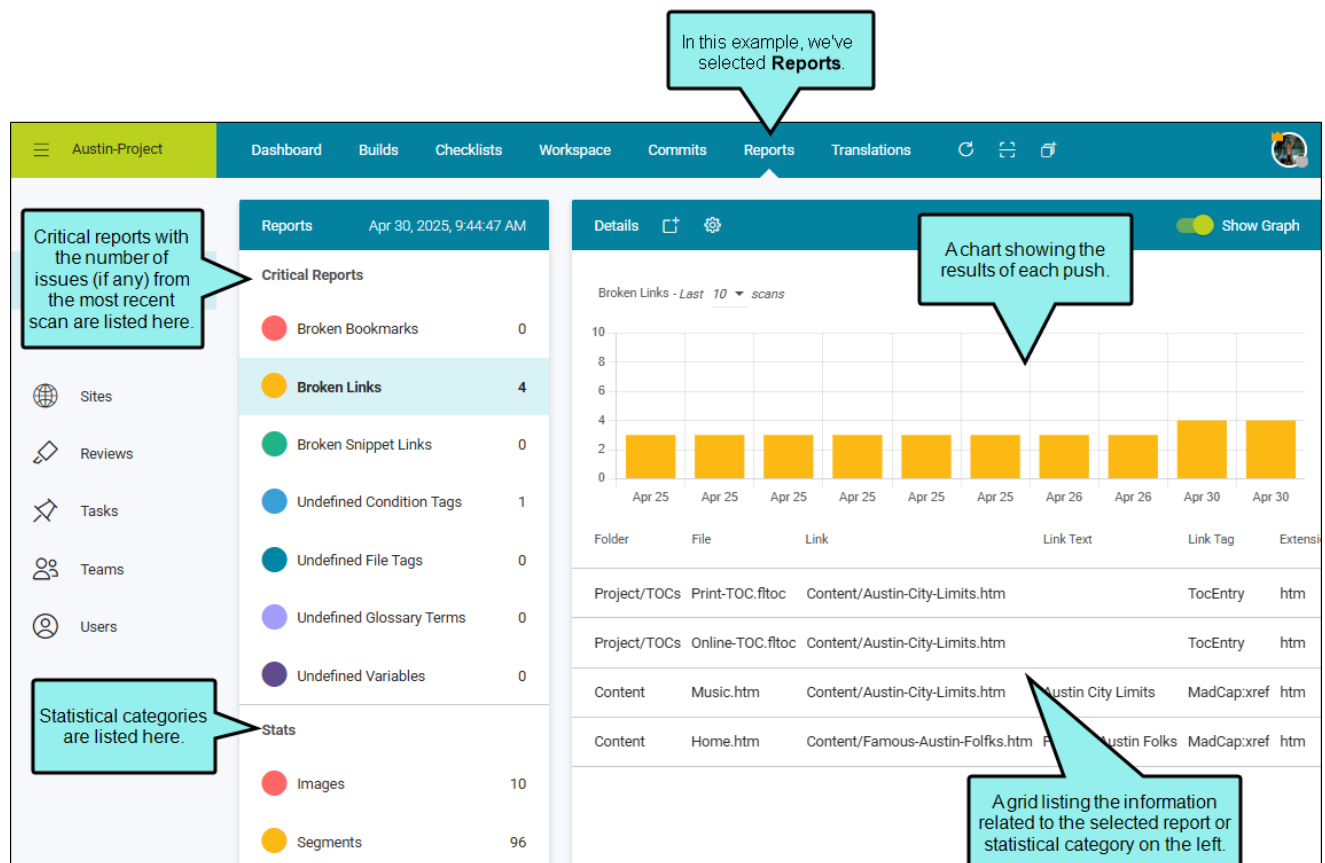
Commit Details:

Content/Attractions.htm [CHANGED]

```
@@ -1,24 +1,28 @@
1 1 <?xml version="1.0" encoding="utf-8"?>
2 2 <html xmlns:MadCap="http://www.madcapsoftware.com/Schemas/MadCap.xsd">
3 3 <head>
4 4 </head>
5 5 <body>
6 6 <h1>Attractions</h1>
7 7 <p>There are many places to visit in Austin. Three of these are
8 8 <h2>State Capitol</h2>
9 9 <p>The Texas State Capitol was finished in 1888. It boasts 22 a
10 10 <p>
11 11 
13 13 <h2>Zilker Park</h2>
14 14 <p>Covering 351 acres, Zilker Park is a popular recreational an
15 15 <p>
16 16 
18 18 <h2>Lady Bird Lake</h2>
19 19 <p>This popular lake is a section of the Colorado River named a
20 20 <p>
21 21 
23 23 </body>
24 24 </html>
25 25
```

Reports

After opening a project in Flare Online, you can click **Reports** at the top of the interface to see various types of reports and statistics. When you select a report or statistical category on the left, a chart and grid are populated on the right with details.



Translations

You can click **Translations** at the top of the interface to begin the translation process and to control your multilingual projects. The Translation page includes two grids, Packages and Branches. Functionally, the grids do the same things, but they each provide a different way to view the translation project.

This screenshot shows the 'Translations' page with the 'Packages' tab selected. The interface includes a top navigation bar with 'Dashboard', 'Builds', 'Checklists', 'Workspace', 'Commits', 'Reports', and 'Translations'. A left sidebar contains 'Home', 'Projects', 'Analytics', 'Sites', 'Reviews', and 'Tasks'. The main content area displays a table of translation packages. Annotations include: 'View language branch information according to package.' pointing to the 'Packages' tab; 'Click the vertical three-dot menu for options.' pointing to a menu icon in the table; and 'Multiple languages can be associated with a package.' pointing to the 'Target Language' column.

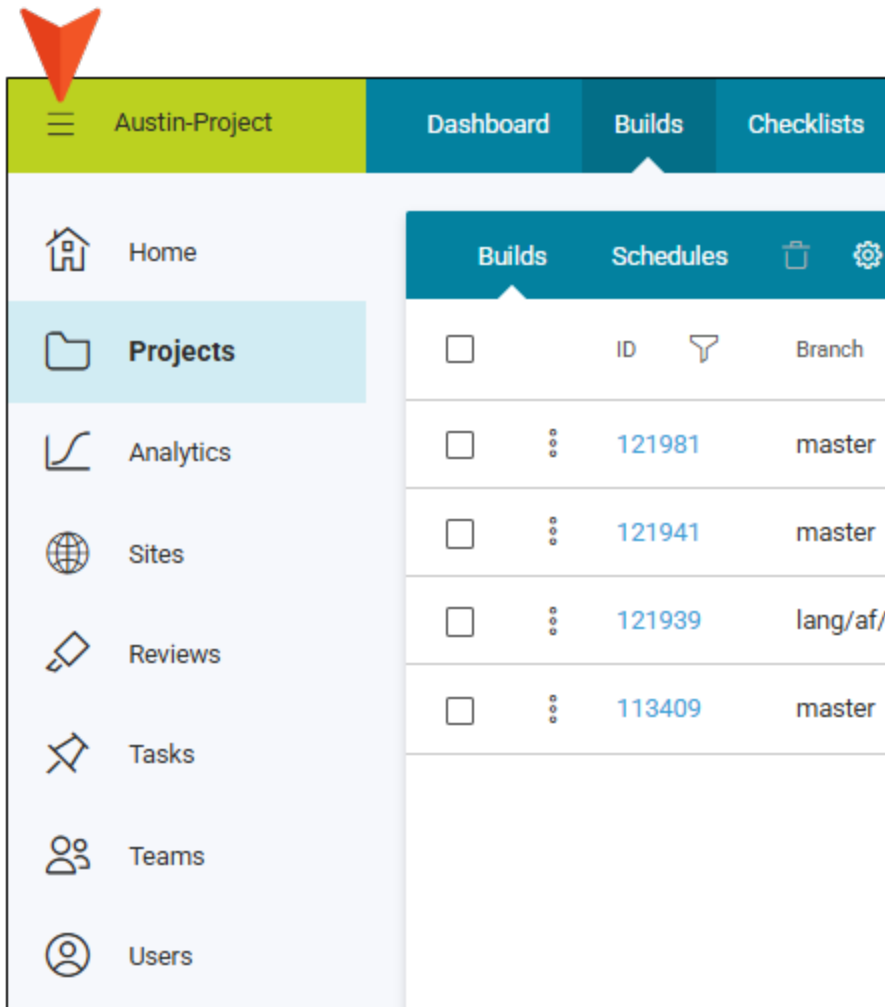
Name	Targets	Source Branch	Due Date	Target Language	Method	Status
Project2	1 target	master	Sep 28, 2024	2 languages		New
Project	1 target	master	Sep 20, 2024	3 languages		In Prog
Test-Austin	1 target	master	Oct 23, 2024	2 languages		New
Waterloo	1 target	master	Sep 03, 2024	1 language	Manual	Sent

This screenshot shows the 'Translations' page with the 'Branches' tab selected. The interface is similar to the Packages view. The main content area displays a table of translation branches. Annotations include: 'View language branch information individually.' pointing to the 'Branches' tab; 'Select a row to enable toolbar options.' pointing to a row in the table; 'Each row is a translation branch with a language associated to it.' pointing to a row; and 'Manage and monitor status of the translation branch.' pointing to the status column.

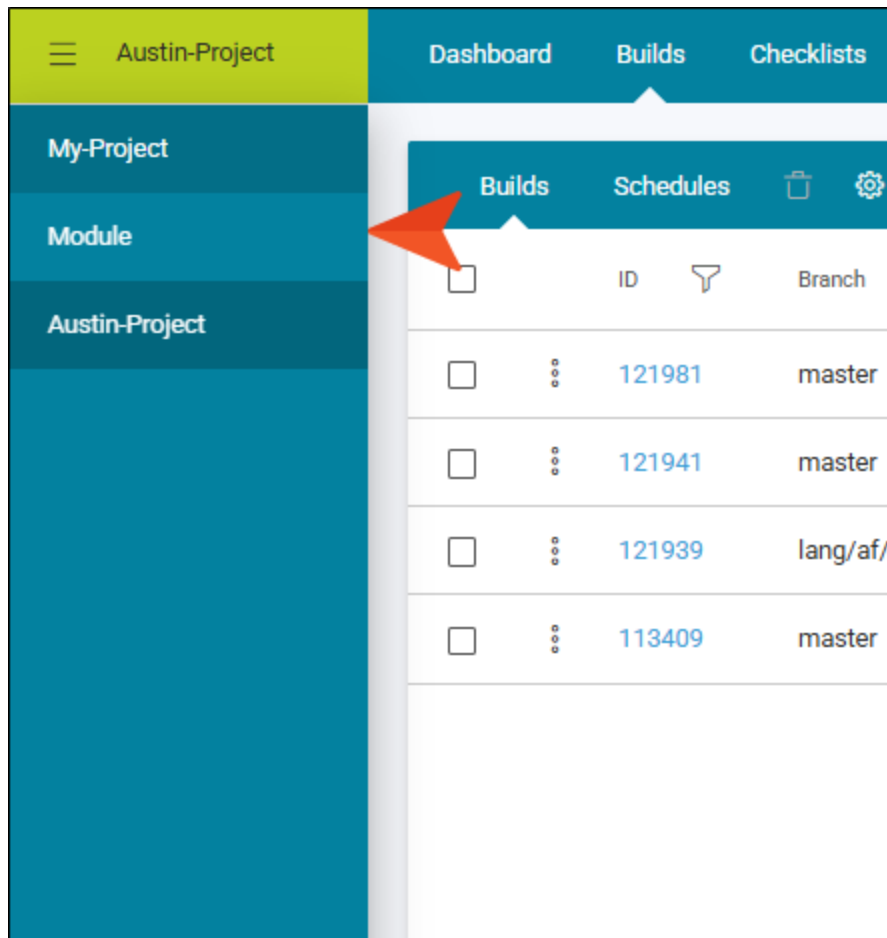
Name	Target Language	Method	Status	Last Downloaded	Last Uploaded	Trans Pack
Czech [cs]	Czech [cs]	Manual	New			
Greek [el]	Greek [el]	Manual	New	Sep 09, 2024 10:24 AM	Sep 09, 2024 1:06 PM	
German [de]	German [de]	Manual	Received	Sep 09, 2024 10:24 AM		
French [fr]	French [fr]	Manual	New	Sep 09, 2024 10:24 AM		
Japanese [ja]	Japanese [ja]		Sent			
Italian [it]	Italian [it]		New			

Accessing Other Projects

Once you've opened a project in Flare Online, you can access a drop-down in the upper-left corner of the interface.



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



CHAPTER 6

Sites

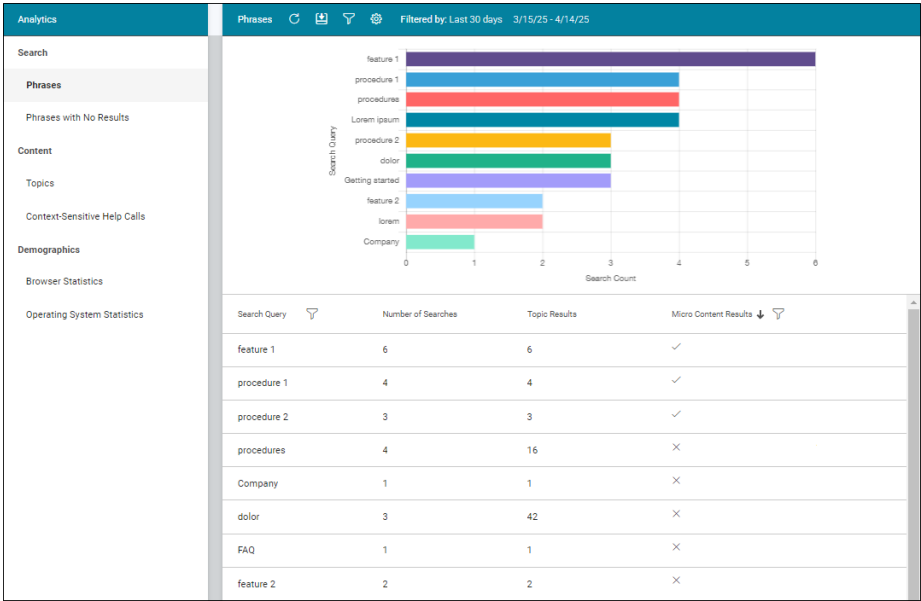
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Four page views are available: Sites, URLs, Security, Themes.

<div>Sites</div> <div>Home</div> <div>Projects</div> <div>Analytics</div> <div>Sites</div> <div>Reviews</div> <div>Tasks</div> <div>Teams</div> <div>Users</div>	<div>SitesURLsSecurityThemes</div> <div><div><div></div><div></div></div><div><div>Live</div><div>Name</div><div>Vanity</div><div>Private</div><div>Access</div></div><div><div><div><div></div><div></div><div></div></div><div><div>AUS</div><div>Austin-Online-Help</div><div>All users</div></div></div><div><div><div><div></div><div></div><div></div></div><div><div>FLA</div><div>Flare-Project-Combo</div><div>All users</div></div></div><div><div><div><div></div><div></div><div></div></div><div><div>HTM</div><div>HTML5 - Private</div><div>cool-html5-v1</div><div>All users</div></div></div><div><div><div><div></div><div></div><div></div></div><div><div>MOD</div><div>Mod 1 HTML5</div><div>All users</div></div></div><div><div><div><div></div><div></div><div></div></div><div><div>MOD</div><div>Mod 1 PDF V1</div><div>help</div><div>All users</div></div></div><div><div><div><div></div><div></div><div></div></div><div><div>MOD</div><div>Mod 2 - HTML5</div><div>mod2-help</div><div>All users</div></div></div></div></div></div></div></div></div></div>
---	---

CHAPTER 7

Analytics

The Analytics page lets you view user activity on published HTML5 output. This includes search phrases used, search phrases with no results, topics viewed, context-sensitive Help calls, and demographic statistics (browsers and operating systems).

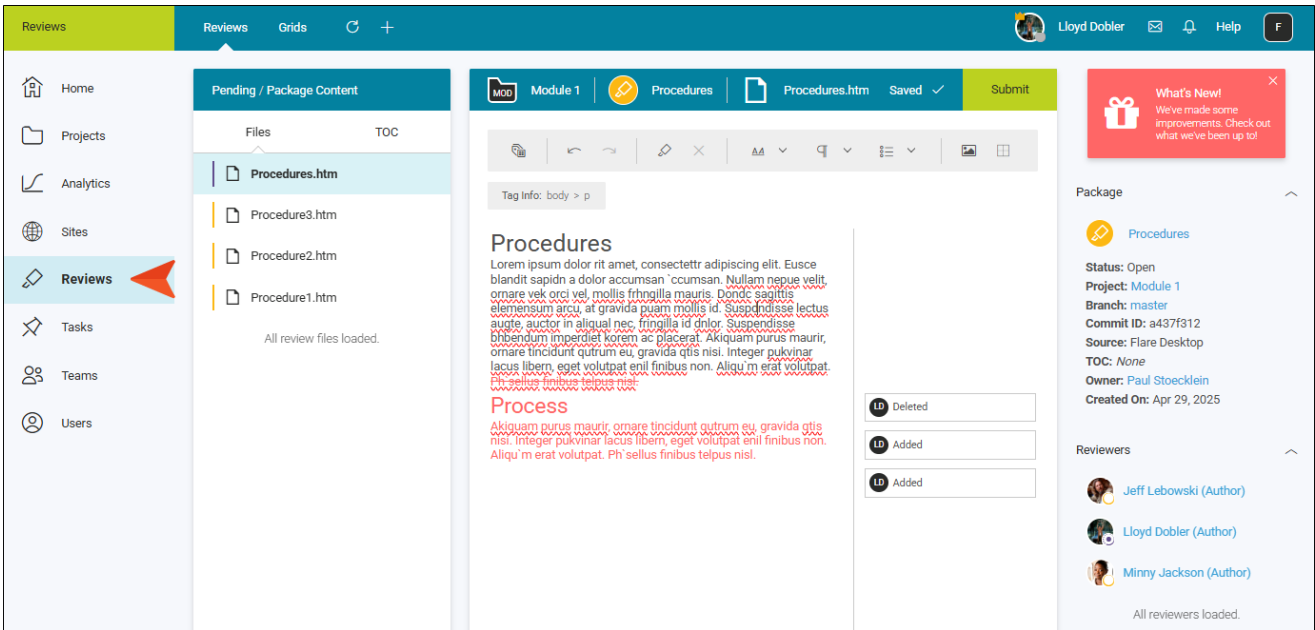


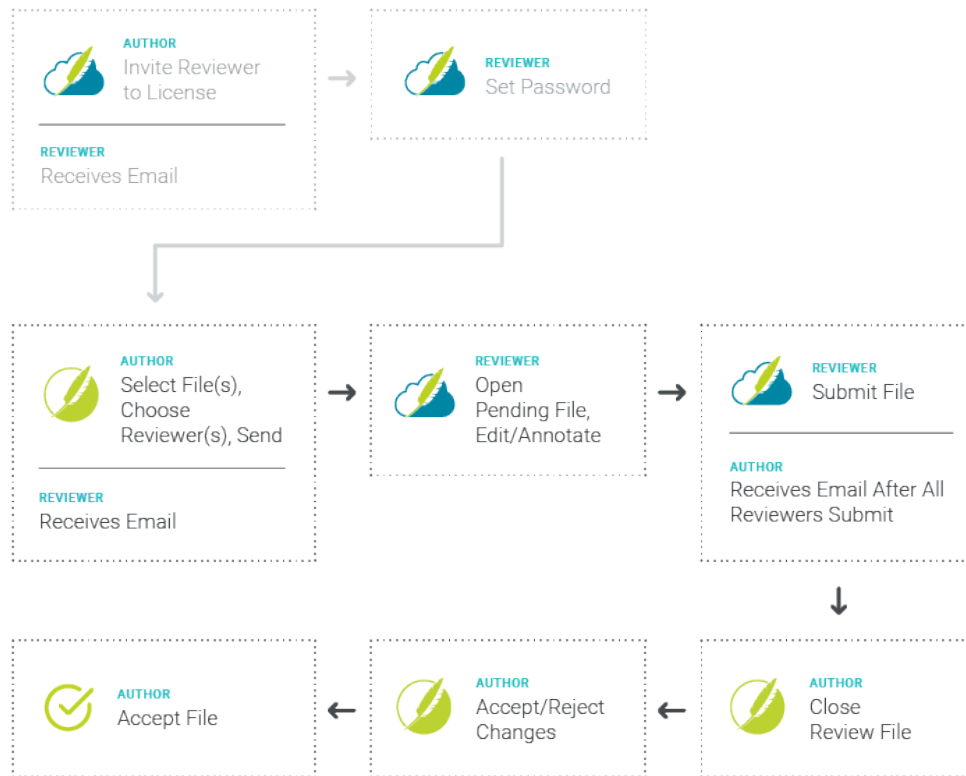
Analytics works on projects located in Flare Online, or you can host output on your own servers. If you host the output outside of Flare Online, you still need to use Flare Online with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Flare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

CHAPTER 8

Reviews

The Reviews page lets you view, edit, and manage review packages that have been sent for review on a particular branch. Bundling files in Flare Desktop enables monitoring the progress of a review and updating packages as needed in Flare Online. The data grids for packages and files gives at-a-glance review package information such as recent activity, reviewers, status, and more. Those reviewing files in Flare Online can see them in a contextual TOC view (i.e., assembled order of topics for output).





Benefits of this review workflow include:

- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version of the editor means a streamlined interface. You only see options and features that are relevant to the review process.
- **Auto-Save and Tracking** Changes in the editor are auto-saved as you work. In addition, all changes are automatically tracked so the owner can easily locate edits for approval or rejection.
- **Branching** Files can be sent for review from a specific Git branch. This lets you keep reviews limited to files that are still in a state of development, as opposed to finished and ready for publication.
- **Workflow Management** Bundling files into review packages favorably services everyone in the review process workflow. Reviewers (e.g., SMEs) can edit and view content from a flat file list or from a contextual TOC view where files display in a TOC for output that an end user might see. Owners (e.g., authors) can edit but they can also monitor and manage reviews in Flare Online. They have access to customizable package and file grids that show review information and progress.

CHAPTER 9

Tasks

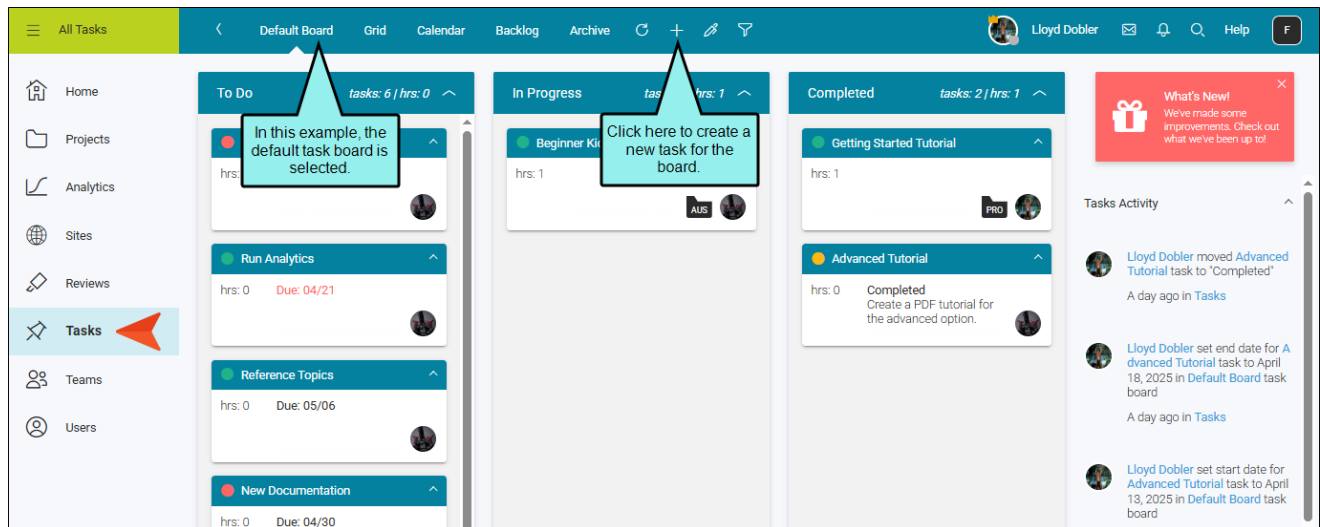
Before creating any tasks, you must first have a task board to hold the tasks. In Flare Online, you can create multiple task boards. This lets you organize tasks according to projects or certain time periods (e.g., product releases).

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

Boards

<div><div></div></div>	Name	<div><div></div></div>	Description	All Tasks	My Tasks	Storage
<div><div></div><div></div><div></div></div>	<div><div>BRA</div></div> Branding		Marketing tasks	4 (0)	1 (0)	0.00 B
<div><div></div><div></div><div></div></div>	<div><div>WID</div></div> Widgets Board		Tasks that have to do with widgets	3 (0)	0 (0)	0.00 B
<div><div></div><div></div><div></div></div>	<div><div>ELE</div></div> eLearning Board		Tasks related to eLearning	4 (0)	0 (0)	0.00 B
<div><div></div><div></div><div></div></div>	<div><div>DEF</div></div> Default Board			9 (2)	1 (0)	0.00 B

The Tasks page lets you keep track of work that needs to be completed and visualize the work flow. When creating a task board and then tasks within it, you can provide various kinds of information.



DetailsDiscussionAttachments

Reference Topics

Move | Delete

Low Priority

Start: 4/25/2025 12:00 AM

Status: To Do

Due: 5/6/2025 12:00 AM

(0) (0) 0 hrs 3 pos

All Day Event

Task Board: Default Board

Owner: Paul Stoecklein

Assigned: Paul Stoecklein

Description:

↶ ↷

B I U

🔗 ✂

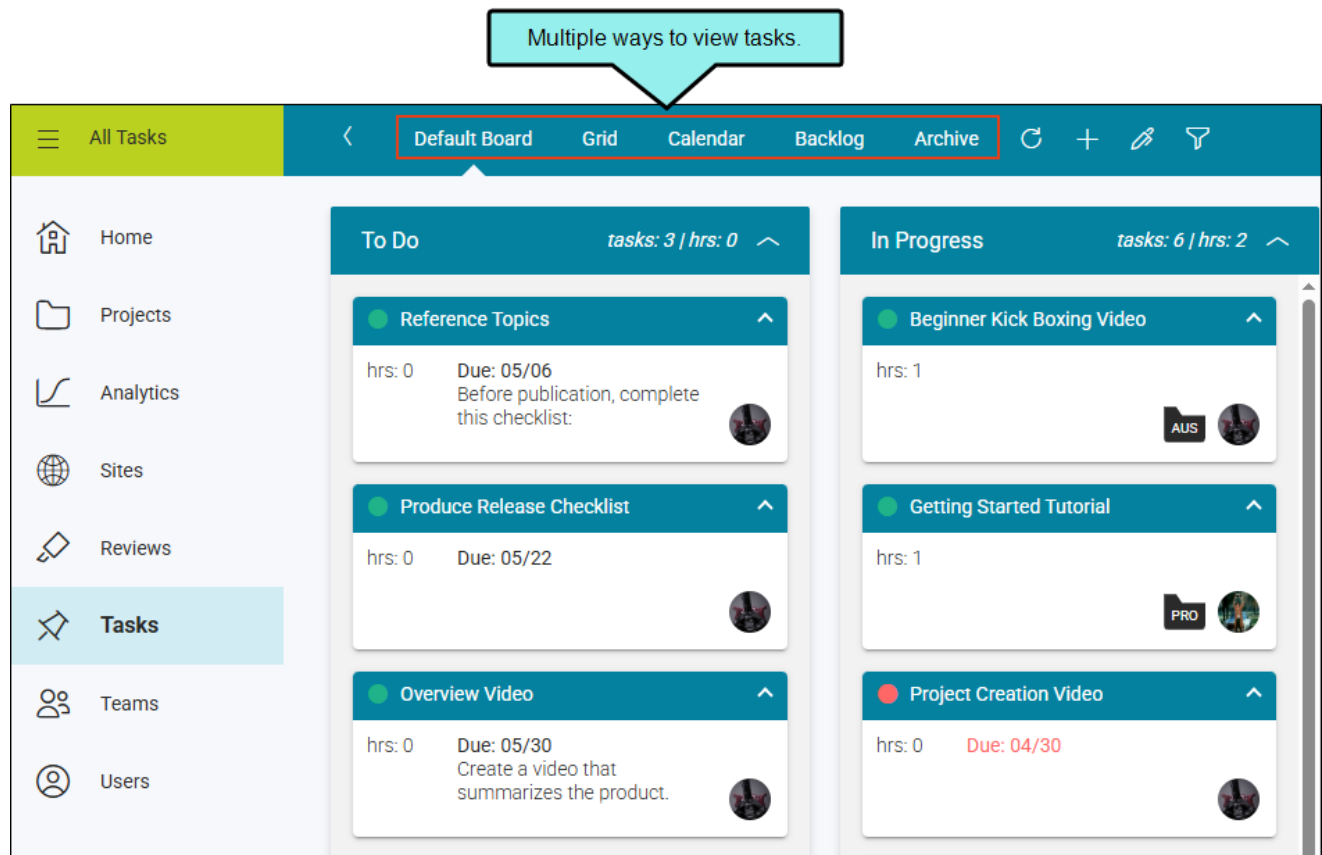
¶ ▼

☰ ▼

Add details for the task in this dialog. Only the title field is required.

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

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

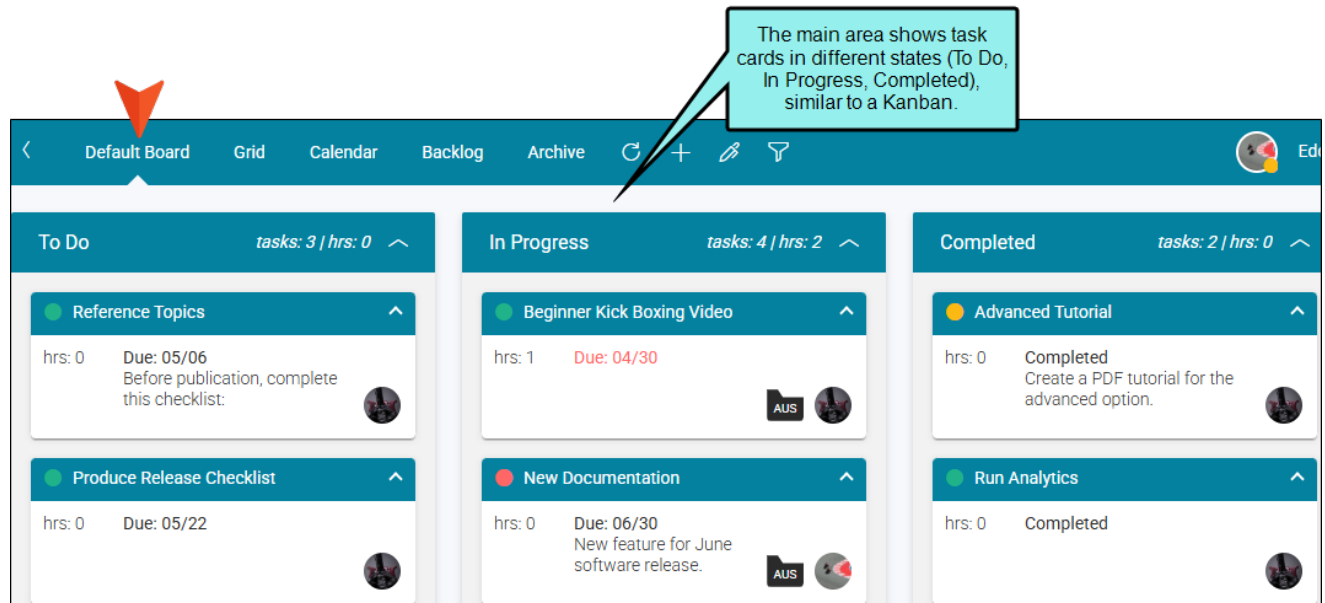


This chapter discusses the following:

Board	51
Grid	57
Calendar	58
Backlog	61
Archive	62

I Board

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



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

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

The interface displays two columns of task cards. The 'To Do' column has a header with 'tasks: 3 | hrs: 0' and an expand/collapse arrow. It contains three cards: 'Reference Topics' (hrs: 0, Due: 05/06), 'Produce Release Checklist' (hrs: 0, Due: 05/22), and 'Overview Video' (hrs: 0, Due: 05/30). The 'In Progress' column has a header with 'tasks: 4 | hrs: 2' and an expand/collapse arrow. It contains four cards: 'Beginner Kick Boxing Video' (hrs: 1, Due: 04/30), 'New Documentation' (hrs: 0, Due: 06/30), and 'Getting Started Tutorial' (hrs: 1). Each card includes a title, duration, due date, description, and an assignee icon.

Column	Task Name	Duration	Due Date	Description	Assignee
To Do	Reference Topics	hrs: 0	Due: 05/06	Before publication, complete this checklist:	[Avatar]
	Produce Release Checklist	hrs: 0	Due: 05/22		[Avatar]
	Overview Video	hrs: 0	Due: 05/30	Create a video that summarizes the product.	[Avatar]
In Progress	Beginner Kick Boxing Video	hrs: 1	Due: 04/30		AUS [Avatar]
	New Documentation	hrs: 0	Due: 06/30	New feature for June software release.	AUS [Avatar]
	Getting Started Tutorial	hrs: 1			PRO [Avatar]

To Do

tasks: 3 | hrs: 0

▼

Reference Topics

▼

Produce Release Checklist

▼

Overview Video

▼

All tasks in To Do are collapsed.

In Progress

tasks: 4 | hrs: 2

↕

Beginner Kick Boxing Video

↕

hrs: 1

Due: 04/30

AUS

New Documentation

↕

hrs: 0

Due: 06/30

New feature for June software release.

AUS

To Do

tasks: 3 | hrs: 0

↕

Reference Topics

↕

hrs: 0

Due: 05/06

Before publication, complete this checklist:

Produce Release Checklist

↕

hrs: 0

Due: 05/22

Overview Video

↕

hrs: 0

Due: 05/30

Create a video that summarizes the product.

In Progress

tasks: 4 | hrs: 2

↕

Beginner Kick Boxing Video

↕

hrs: 1

Due: 04/30

AUS

New Documentation

↕

hrs: 0

Due: 06/30

New feature for June software release.

AUS

Getting Started Tutorial

↕

hrs: 1

PRO

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

↑

To Do

tasks: 3 | hrs: 0

● Reference Topics

↑

hrs: 0 Due: 05/06
Before publication, complete this checklist:

● Produce Release Checklist

↓

● Overview Video

↓

↑

In Progress

tasks: 4 | hrs: 2

● Beginner Kick Boxing Video

↑

hrs: 1 Due: 04/30

AUS

● [Task Card]

↑

line
software release.

AUS

Just these two task cards are collapsed.

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

The image shows a Kanban board with two columns: 'To Do' and 'In Progress'. Each column has a header with task counts and an expand/collapse arrow. The 'To Do' column contains three task cards, and the 'In Progress' column contains three task cards. A callout bubble points to the 'Produce Release Checklist' task in the 'To Do' column, indicating it can be moved.

Column	Task Name	Hours	Due Date	Description	Assignee
To Do	Reference Topics	hrs: 0	Due: 05/06	Before publication, complete this checklist:	[Avatar]
	Produce Release Checklist	hrs: 0	Due: 05/22		[Avatar]
	Produce Release Checklist	hrs: 0	Due: 05/30	Create a video that summarizes the product.	[Avatar]
In Progress	Beginner Kick Boxing Video	hrs: 1	Due: 04/30		AUS [Avatar]
	Produce Release Checklist	hrs: 0	Due: 06/30	New feature for June software release.	AUS [Avatar]
	Getting Started Tutorial	hrs: 1			PRO [Avatar]

↑

tasks: 3 | hrs: 0

To Do

↑

Reference Topics

hrs: 0 Due: 05/06
Before publication, complete this checklist:

↑

Overview Video

hrs: 0 Due: 05/30
Create a video that summarizes the product.

↑

Produce Release Checklist

hrs: 0 Due: 05/22

↑

tasks: 4 | hrs: 2

In Progress

↑

Beginner Kick Boxing Video

hrs: 1 Due: 04/30

AUS

↑

New Documentation

hrs: 0 Due: 06/30
New feature for June software release.

AUS

↑

Produce Release Checklist

hrs: 1

PRO

New location for this task.

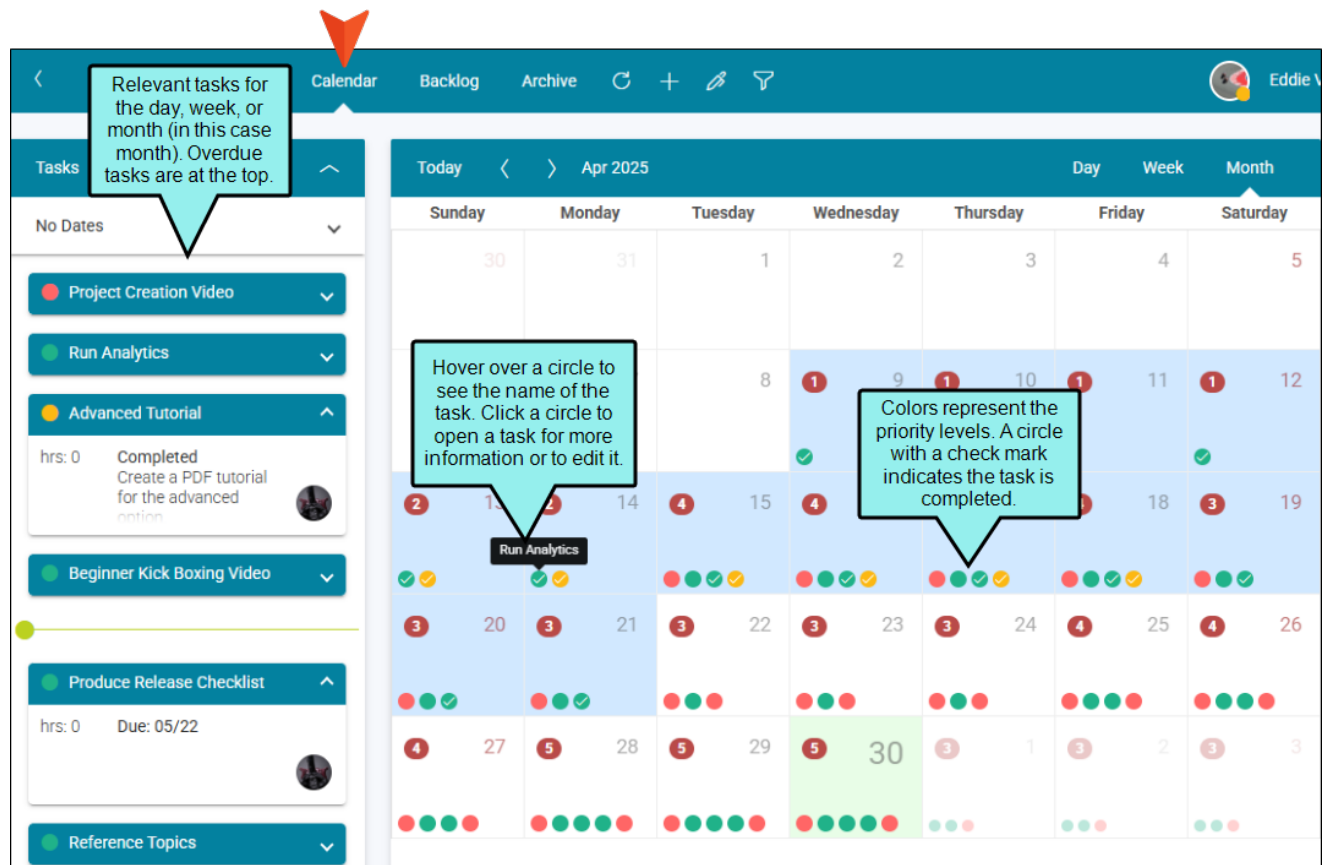
Grid

The Grid view displays tasks in a row format. You can click a task name to edit it. Also, you can use the check boxes to select one or more rows in order to take an action on all those tasks at once, such as moving them to another milestone or deleting them.

	Name	Project	Assigned To	Priority	Start Date
<input type="checkbox"/>	New Documentation	AUS	Eddie Vanetti	High	Apr 22, 2025 12:00 AM
<input type="checkbox"/>	Getting Started Tutorial	PRO	Lloyd Dobler	Low	
<input type="checkbox"/>	Beginner Kick Boxing Vi...		Stoecklein	Low	Apr 28, 2025 12:00 AM
<input type="checkbox"/>	Finish Index		Lloyd Dobler	Low	
<input checked="" type="checkbox"/>	Overview Video		Stoecklein	Low	May 07, 2025 12:00 AM
<input checked="" type="checkbox"/>	Advanced Tutorial		Stoecklein	Medium	Apr 13, 2025 12:00 AM
<input type="checkbox"/>	Reference To		Paul Stoecklein	Low	Apr 25, 2025 12:00 AM
<input type="checkbox"/>	Run Analytics		Paul Stoecklein	Low	Apr 09, 2025 12:00 AM

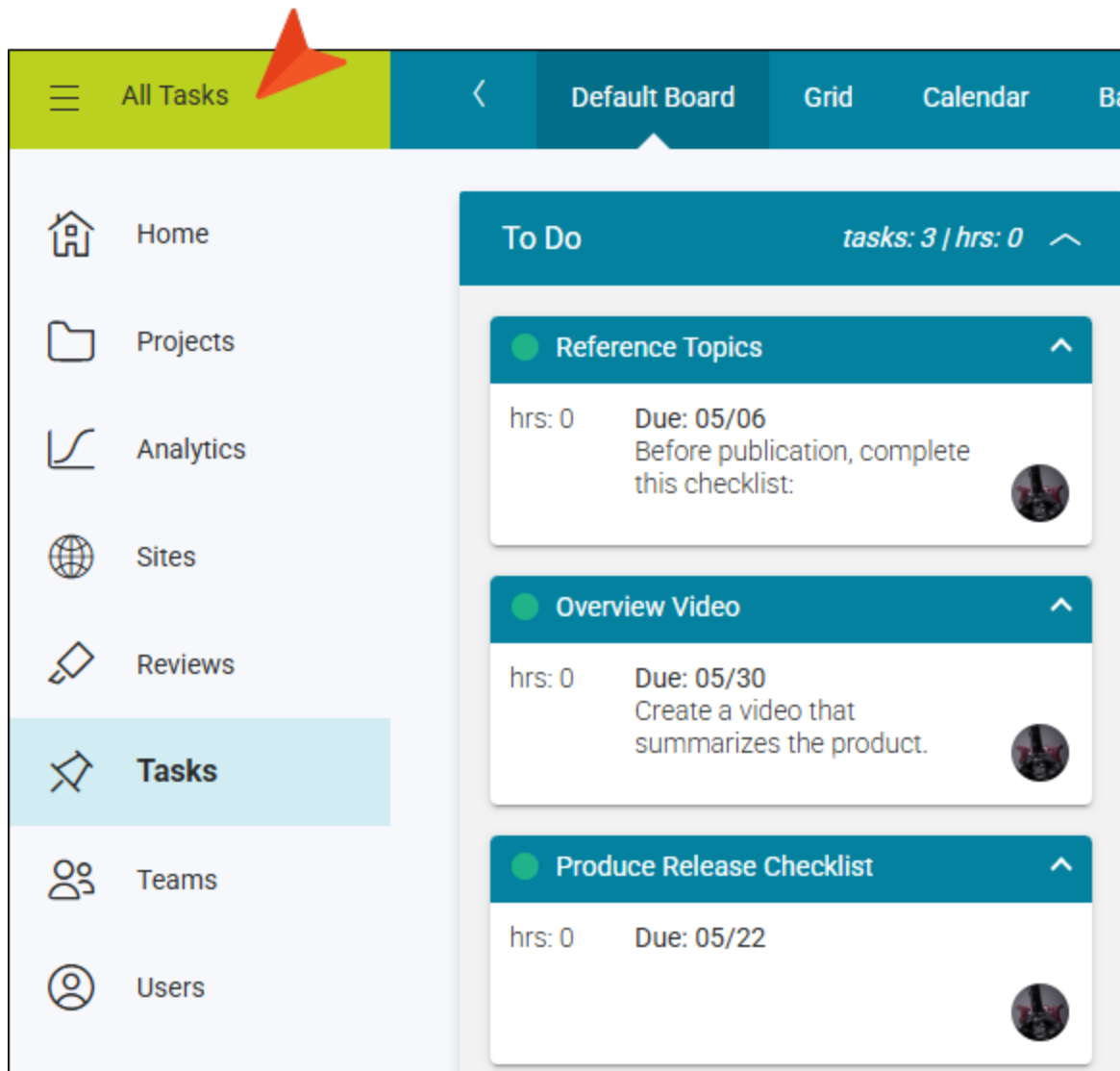
Calendar

The Calendar view displays tasks in a calendar format for the day, week, and month, with task cards listed to the left. Tasks in all milestones—including the Backlog and Archive—are included. However, only tasks that contain dates are displayed in the Calendar view. Small, color-coded circles represent tasks and their priority levels. Hovering over a circle lets you see the name of a task, and clicking the circle opens the task so you can edit it.

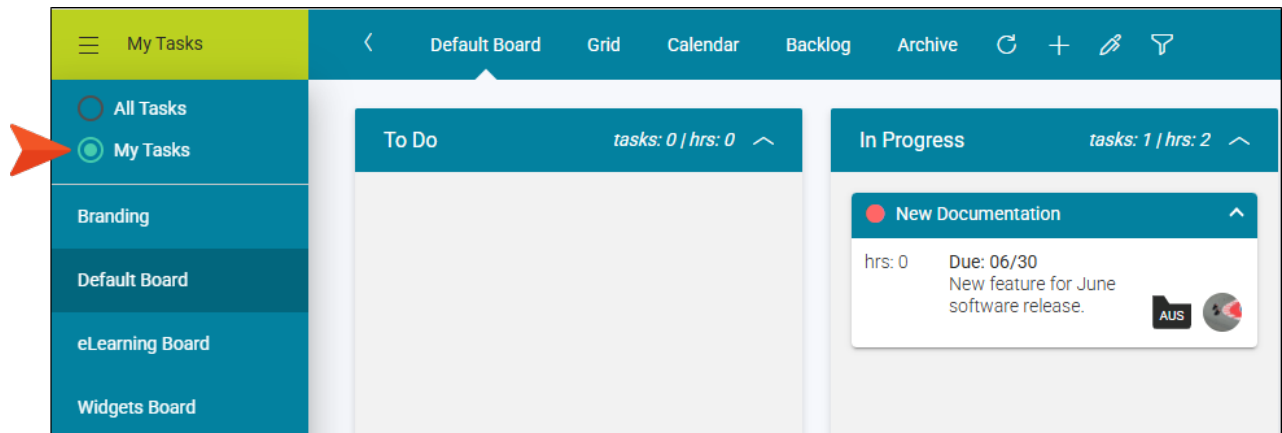


Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all of them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and other filters work in any of the Task page views, but can be especially useful in the Calendar view.

To use the "All Tasks/My Tasks" filter, click the upper-left corner of the interface, which by default, should initially say **All Tasks**.

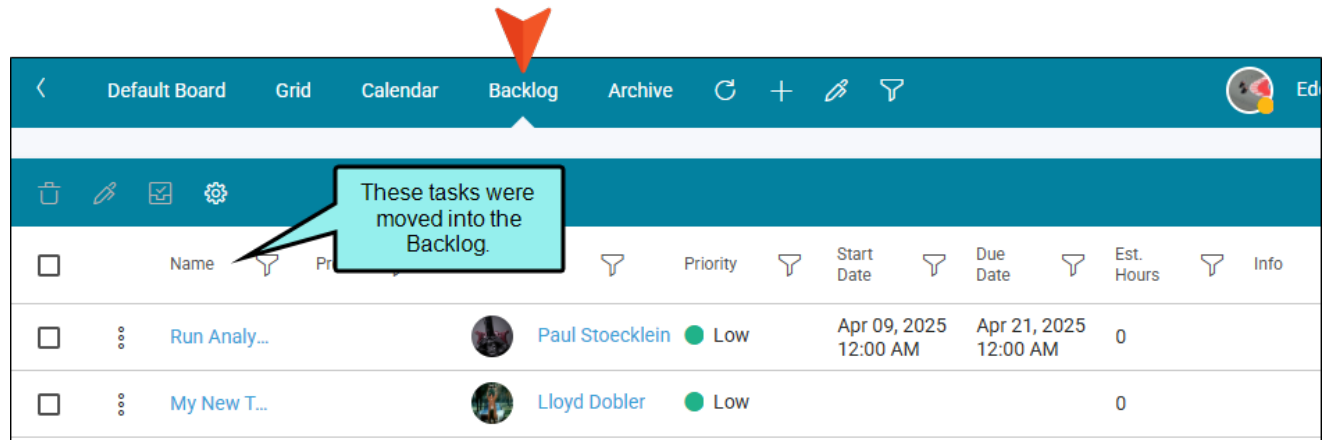




Then, in the flyout menu, you can select **My Tasks**.



I Backlog

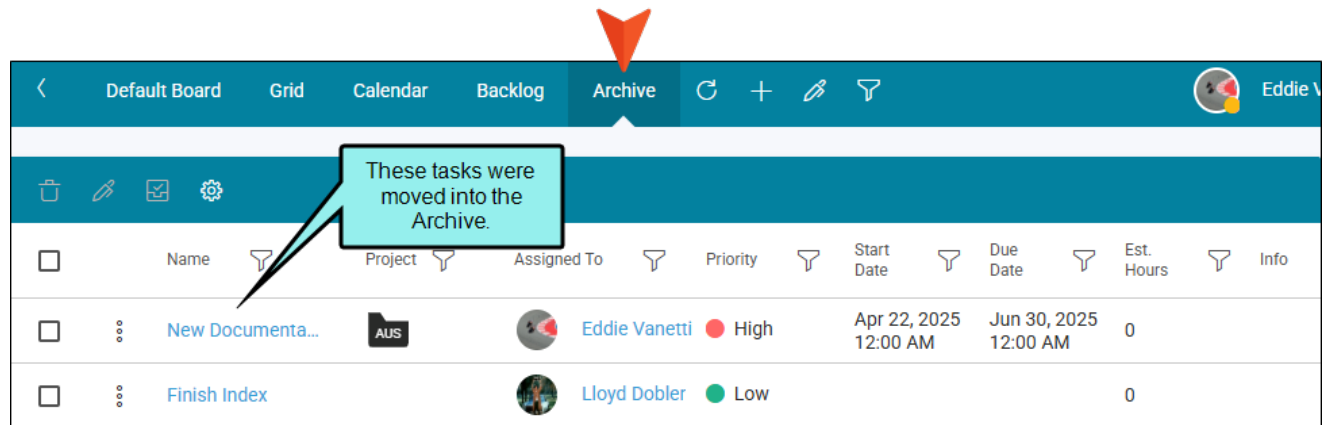
The Backlog view displays tasks that are not yet complete and need to be removed from the work flow. The idea is that backlogged tasks will be revisited in the future so that they can be completed.



<div><div><div><div><</div><div>Default Board</div><div>Grid</div><div>Calendar</div><div>Backlog</div><div>Archive</div><div>↺</div><div>+</div><div>✎</div><div>⌵</div></div><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div></div></div><div>Ed</div></div>										
<input type="checkbox"/>	Name	Pr	Priority	Start Date	Due Date	Est. Hours	Info			
<input type="checkbox"/>	⋮ Run Analy...		Paul Stoecklein	● Low	Apr 09, 2025 12:00 AM	Apr 21, 2025 12:00 AM	0			
<input type="checkbox"/>	⋮ My New T...		Lloyd Dobler	● Low			0			

I Archive

The Archive view displays tasks that have been finished and moved out of the current workflow. It is sort of like putting boxes of old documents into the attic; you want them out of the way but can retrieve them later if necessary.



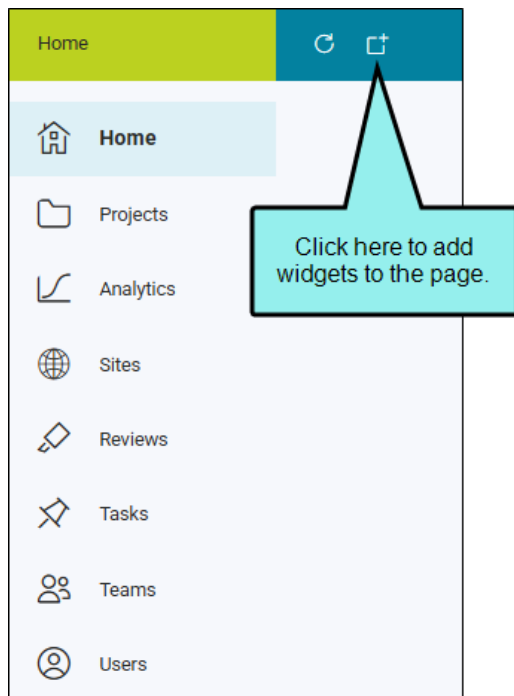
Archive									
These tasks were moved into the Archive.									
<input type="checkbox"/>	Name	Project	Assigned To	Priority	Start Date	Due Date	Est. Hours	Info	
<input type="checkbox"/>	New Documenta...	AUS	Eddie Vanetti	High	Apr 22, 2025 12:00 AM	Jun 30, 2025 12:00 AM	0		
<input type="checkbox"/>	Finish Index		Lloyd Dobler	Low			0		

CHAPTER 10

Widgets

Widgets are standalone information objects that let you see data at a glance and provide quick access to certain areas. You can add widgets for all kinds of information on your Flare Online license.

As information is added to your system, you will probably find it useful to add widgets to your Home dashboard, as well as to individual Project dashboards. Users can customize their own dashboards to meet individual preferences and work habits.



×

Add Widgets

☒

Bookmarks

☐

Build Activity

☐

Build History

☐

Checklist

☐

Live Sites

☐

Project Properties

☐

Reports

☒

Storage and Usage

☐

Task Calendar

☒

Task Summary

Add

You can click and drag widgets to resize them as you like on your dashboard.

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

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

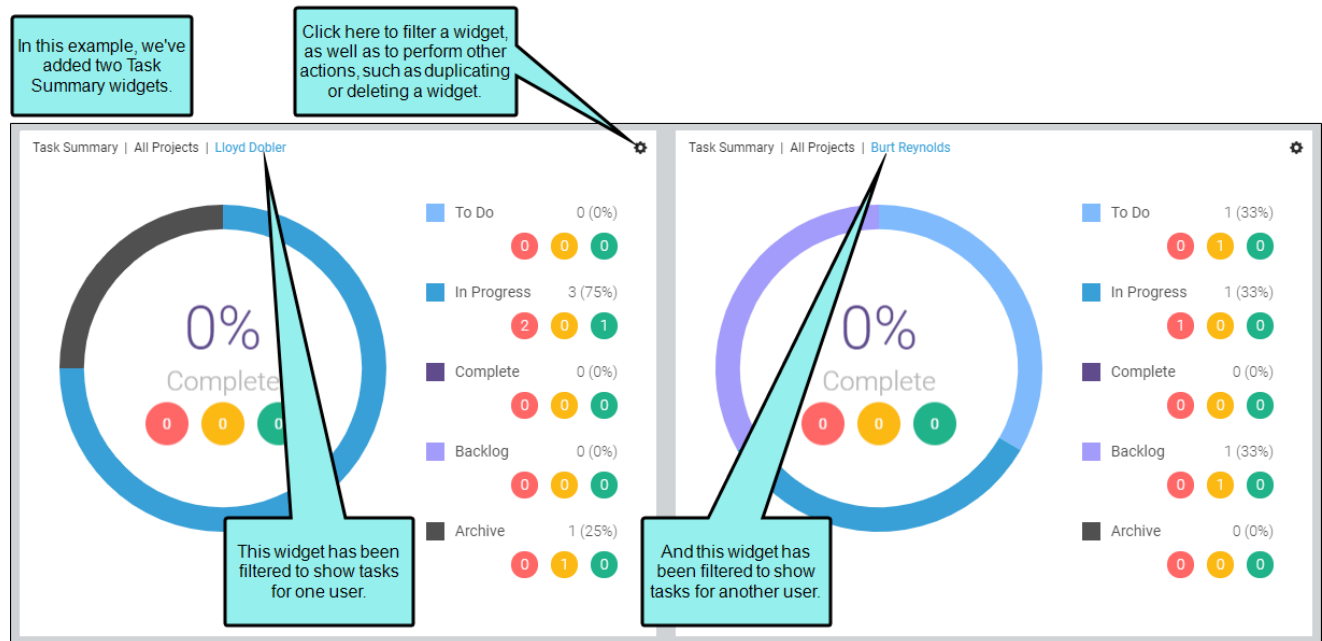
The Bookmarks widget lets you quickly open certain project pages.

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

Name	Project	Branch	Target	Vanity	Live Date
Mod 1 HTML5		Any Branch		Vanity not set	Apr 29, 2025 1:38 PM
Austin-Online-Help	Austin-Project	master	All-About-Austin...	Vanity not set	Apr 29, 2025 1:37 PM

If the screen width is reduced enough, the widgets are reconfigured to stack on top of one another, making them easier to see.

Keep in mind that you can add the same kind of widget multiple times to your dashboard. For example, if you are a documentation manager, you might want to add a Task Summary widget and filter it to show only your tasks. But you then might want to also add a separate Task Summary widget for each of your writers to see the tasks assigned to each of them.



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