madcap software

USER GUIDE

MADCAP FLARE ONLINE

Sites Guide

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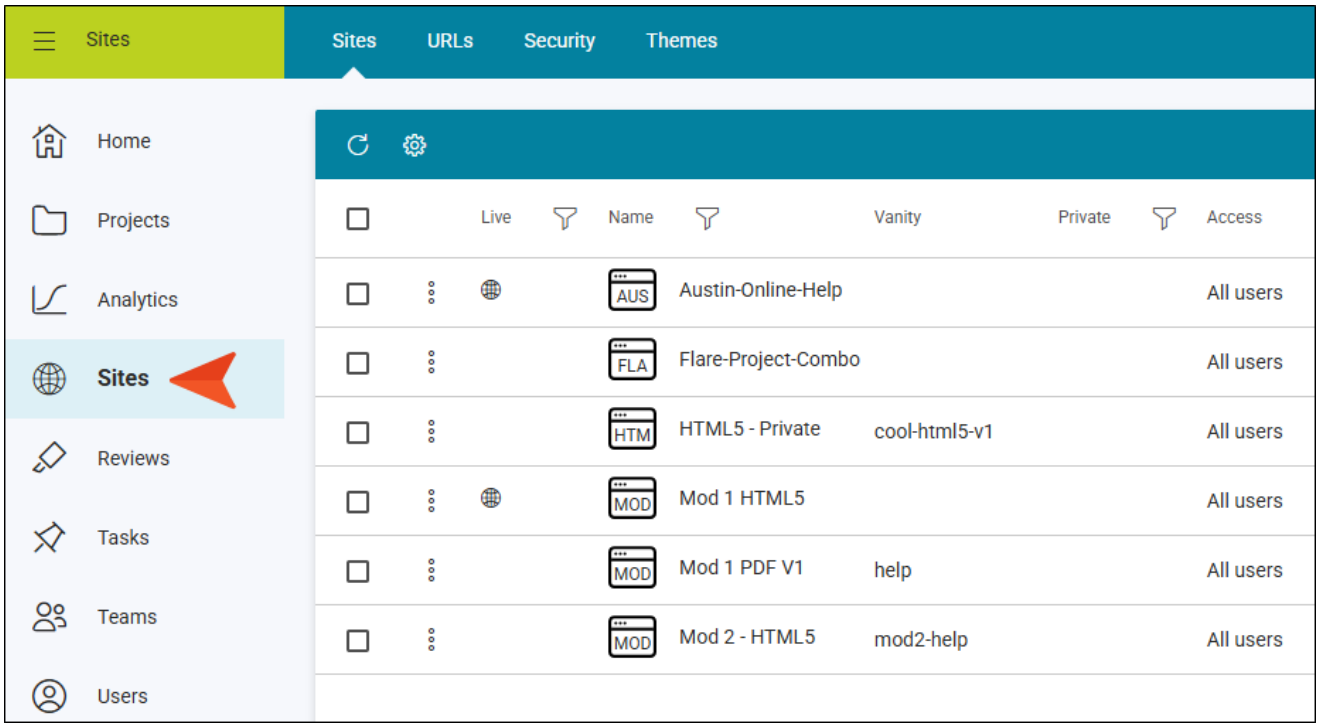
CHAPTER 1

Introduction

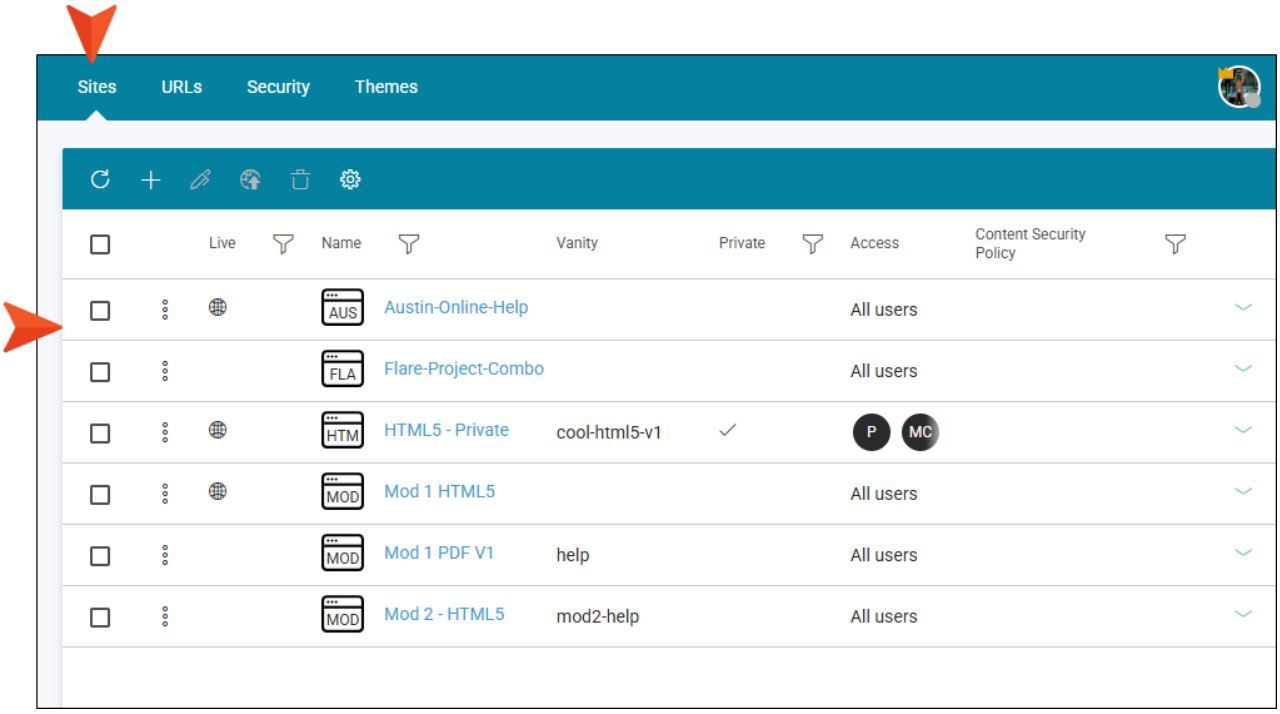
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Four page views are available: Sites, URLs,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



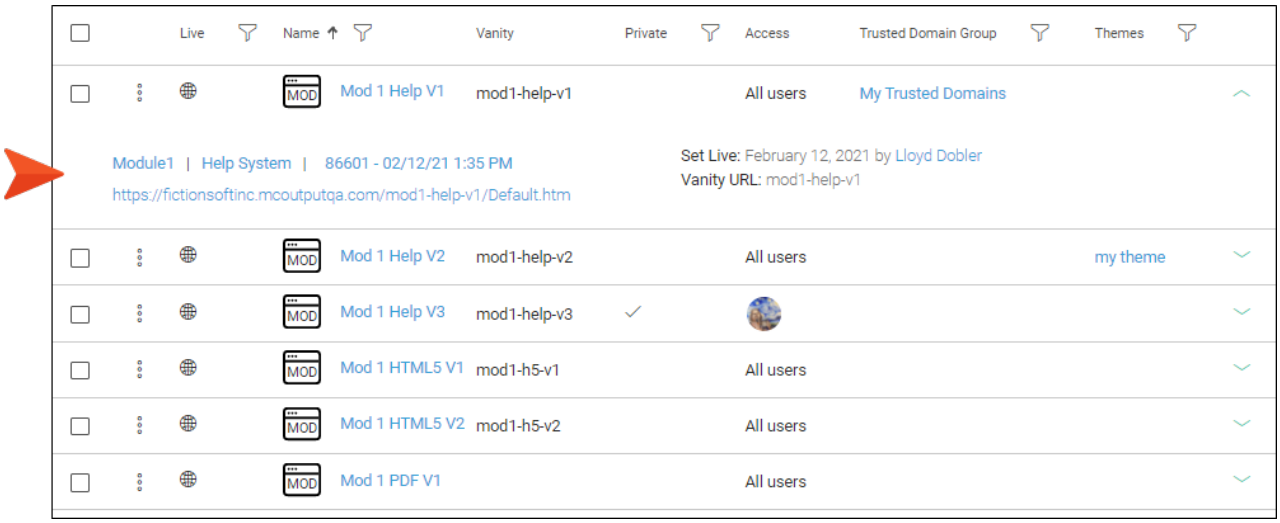
CHAPTER 2

Sites Page View

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



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



This chapter discusses the following:

Main Activities for Sites 8
Other Activities for Sites 44

Main Activities for Sites

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

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

Creating Sites

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Create a Site

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

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

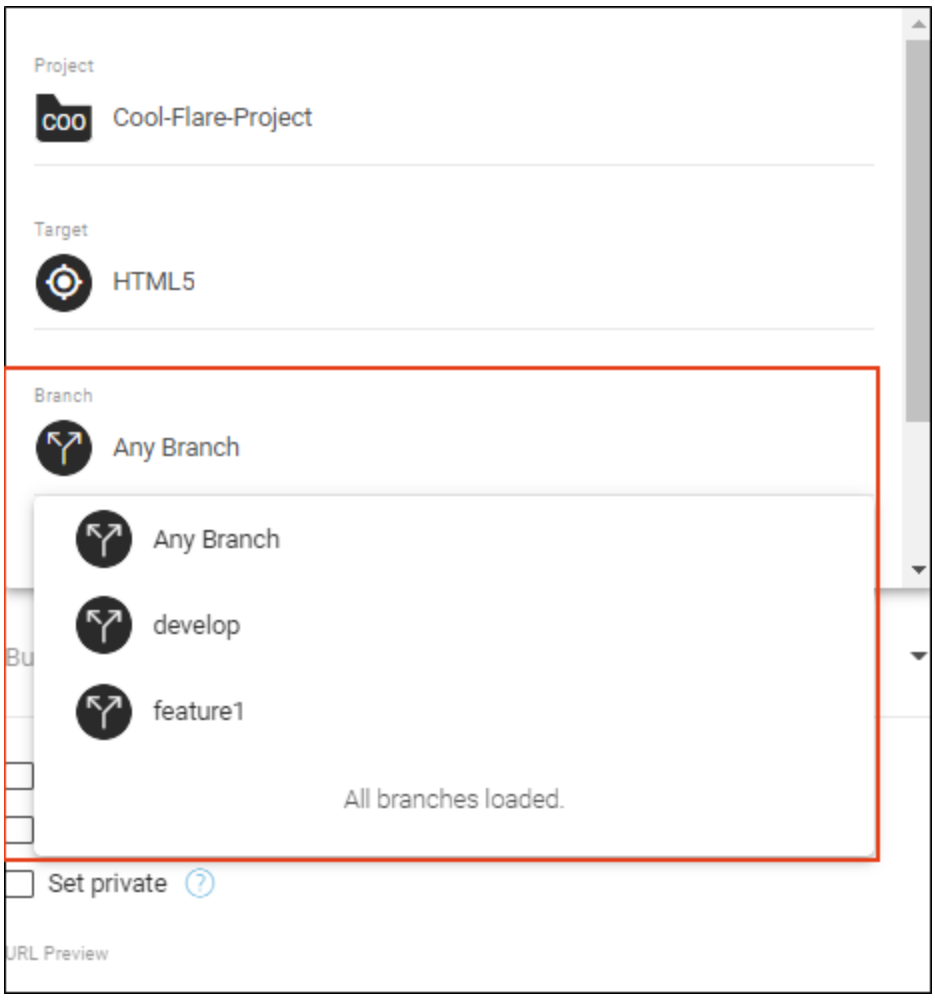
> NOTE Keep in mind that the avatar automatically generated for the site will display the first three characters of the site's name.

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

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

- Site Theme (Optional) Select a theme to use when displaying various interface elements (e.g., login fields, 404 pages) to end users. If you do not select a theme, the default Flare Online design will be used.
- Site Content Security Policy (Optional) You can select a security policy that you have created to prevent unwanted dynamic resources from loading (see "Security Page View" on page 68).

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



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

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

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

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

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

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

5. Click Save.

Editing Sites

You can edit a site to adjust its settings.

Permission Required?

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

For more information about permissions, see the Help system.

How to Edit a Site

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

Setting Site Vanities

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

> ☆ EXAMPLE
>
> `https://fictionsoft.mcoutput.com/64951/Default.htm`

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

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Set a Vanity for a Site

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

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

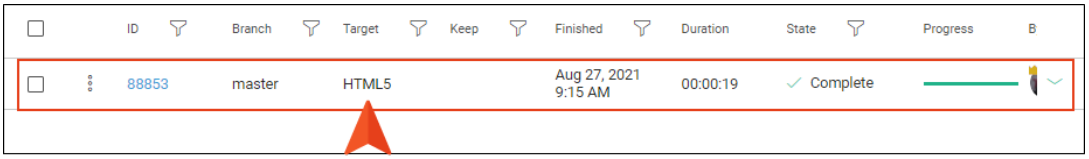
4. Click **Save**.

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

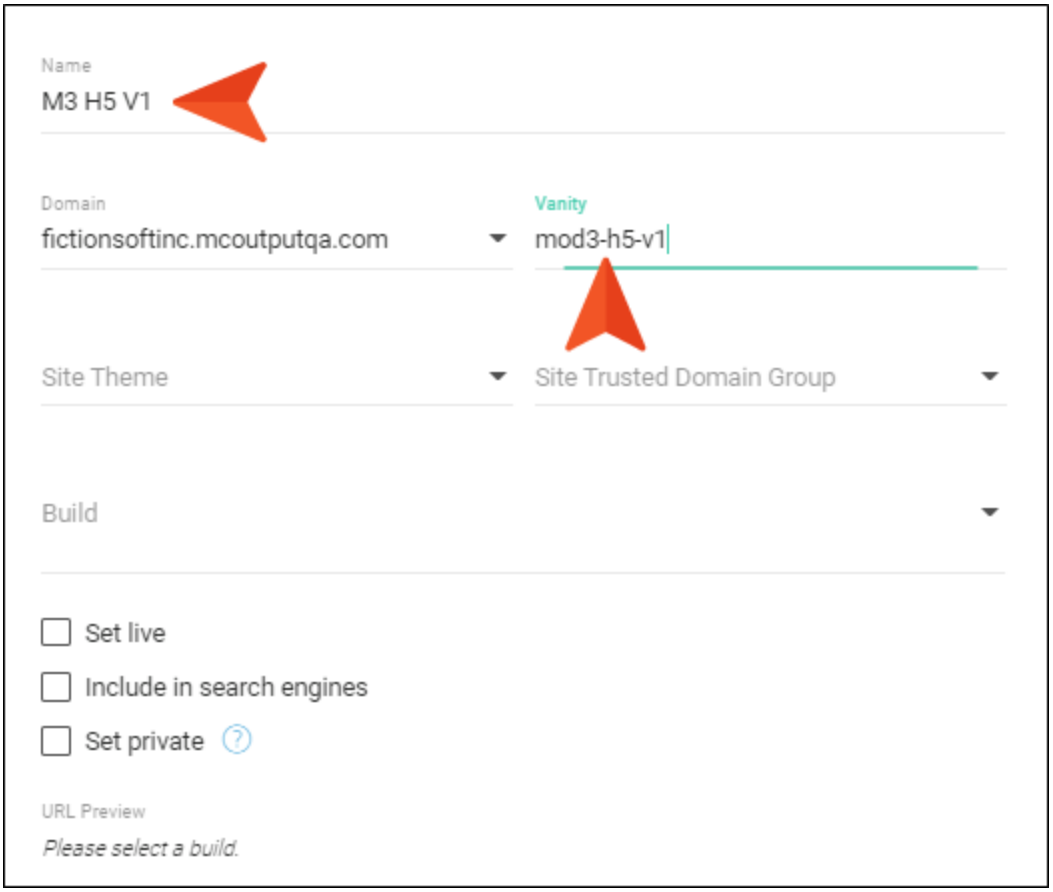
Periodically, your company releases a new version of the software. As a technical writer, you need to produce documentation for each of those releases.

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

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

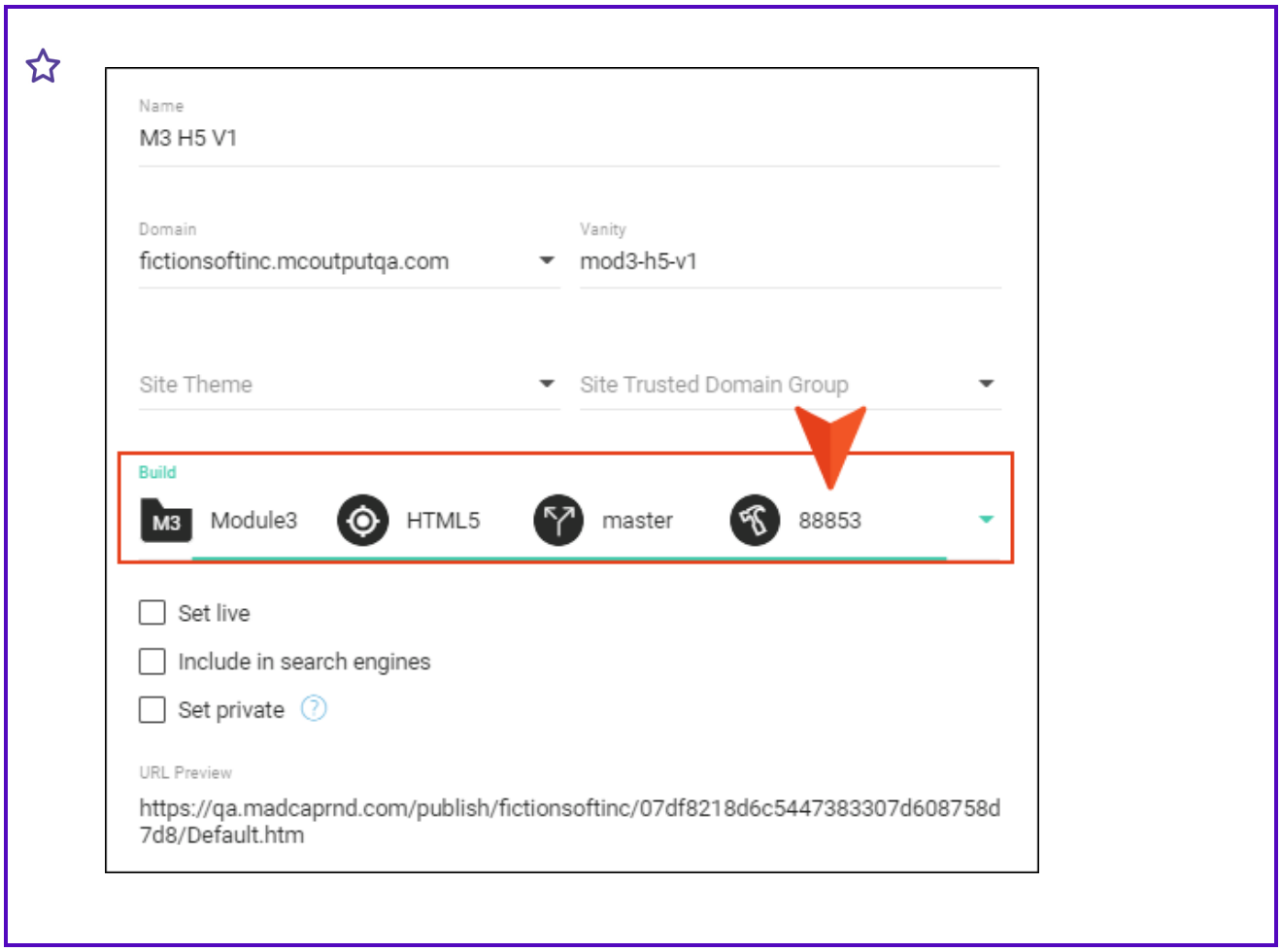


☆ You want this Module 3 Version 1 documentation to have a unique path, different than the paths for other modules, and different than later versions of Module 3. So you create a new site for this output. You decide to name it M3 H5 V1, and you give it a vanity with a similar name: mod3-h5-v1.

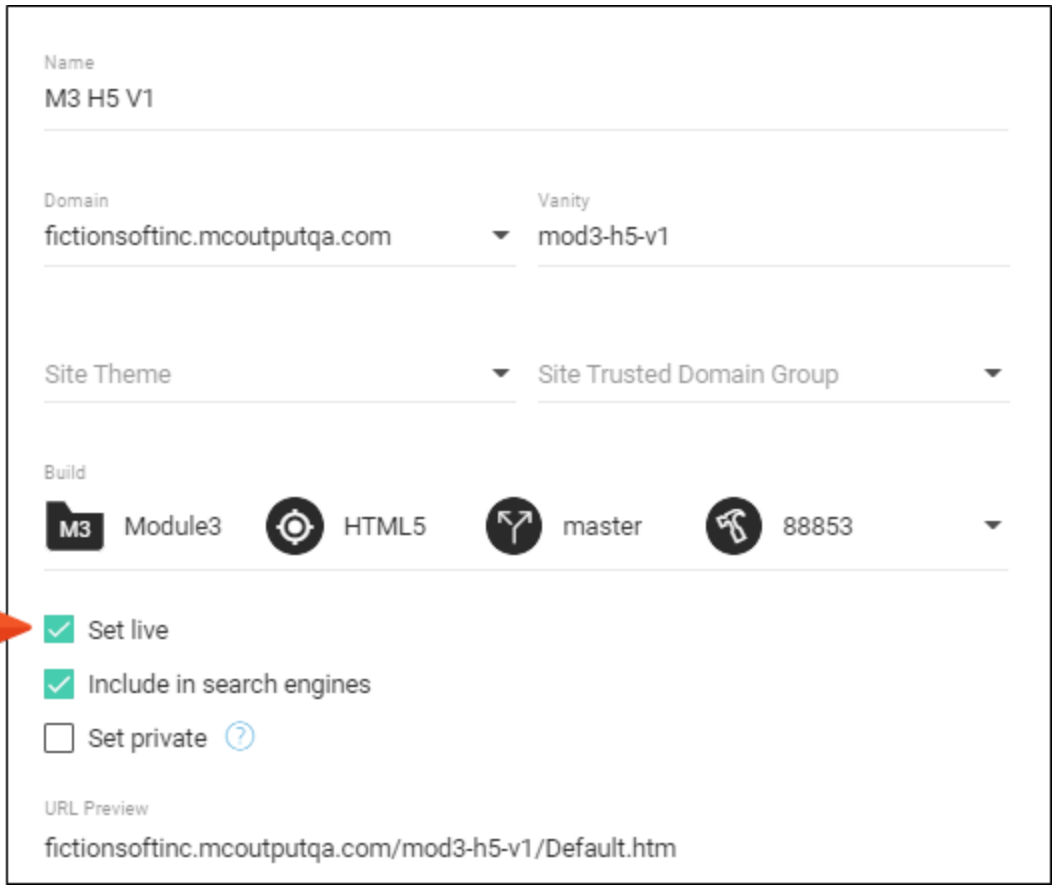


The first part of this name/vanity (mod3) refers to the project name (Module 3), to keep it distinct from the other projects. The second part (h5) refers to the kind of target (HTML5), to keep it distinct from the many PDFs you will also be producing for that project. And the third part (v1) refers to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

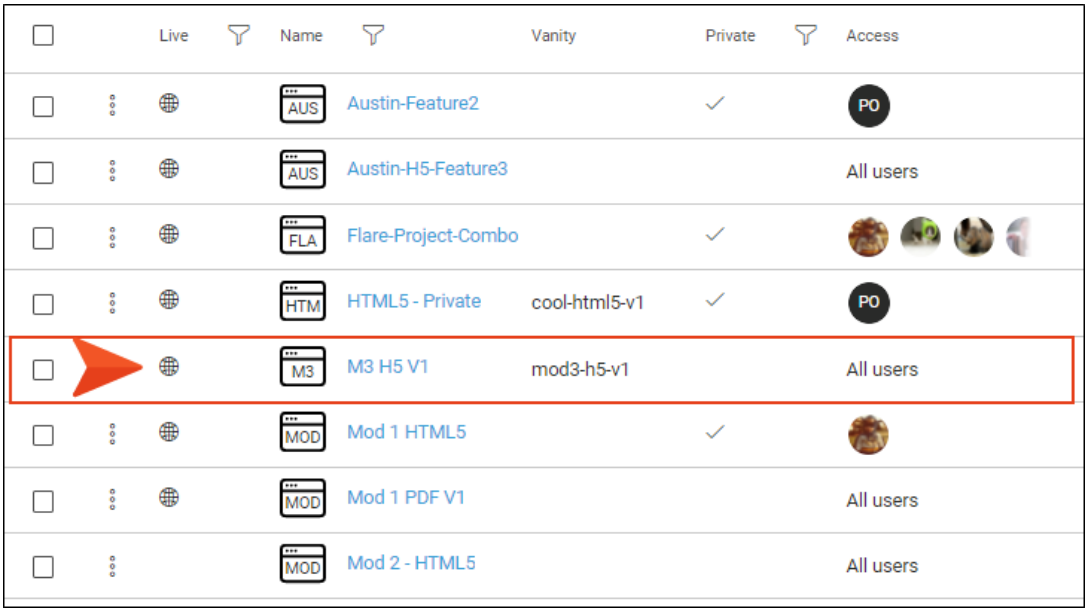
When selecting the build, you choose the Module 3 project, the HTML5 target, and the master branch. Finally, you choose the build that you know is ready for publication.


Name
M3 H5 V1
Domain
fictionsoftinc.mcoutputqa.com
Vanity
mod3-h5-v1
Site Theme
Site Trusted Domain Group
Build
M3
Module3
HTML5
master
88853
Set live
Include in search engines
Set private
URL Preview
https://qa.madcaprnd.com/publish/fictionsoftinc/07df8218d6c5447383307d608758d7d8/Default.htm

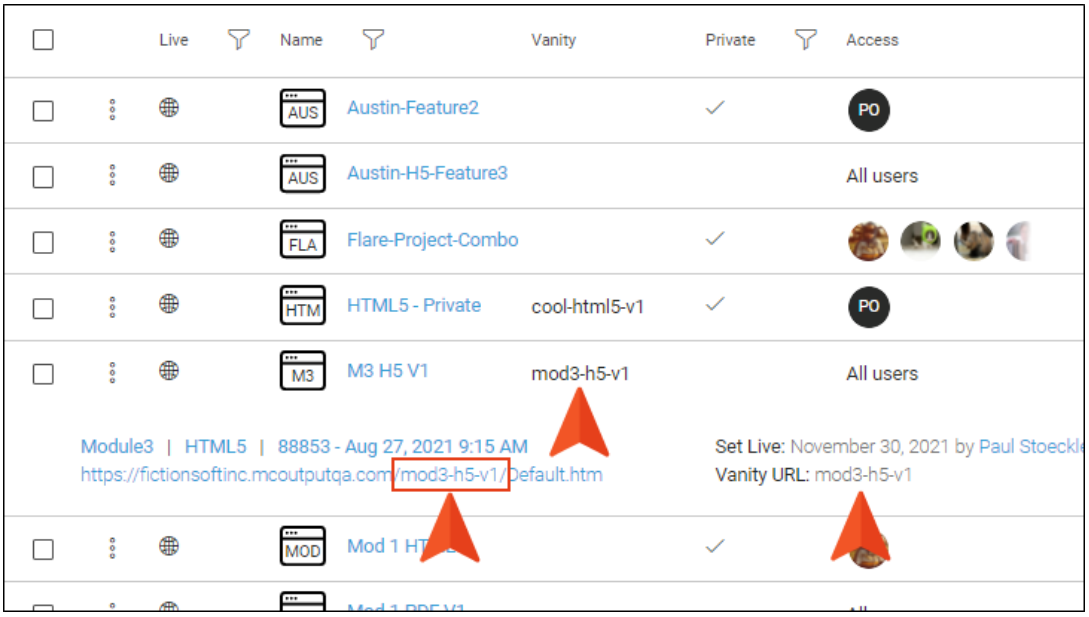
You also click **Live** to make the output available to your audience.



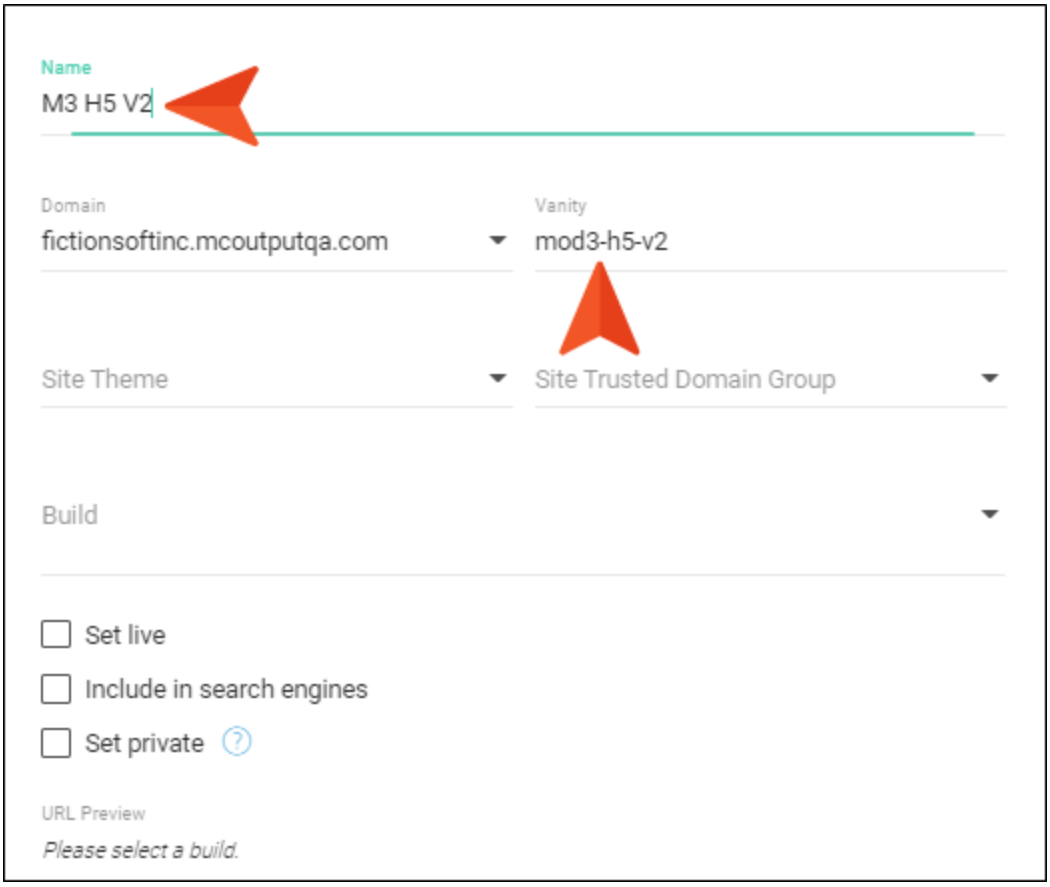
☆ After clicking **Save**, the profile opens. You close the profile and see the site has the live icon next to it.



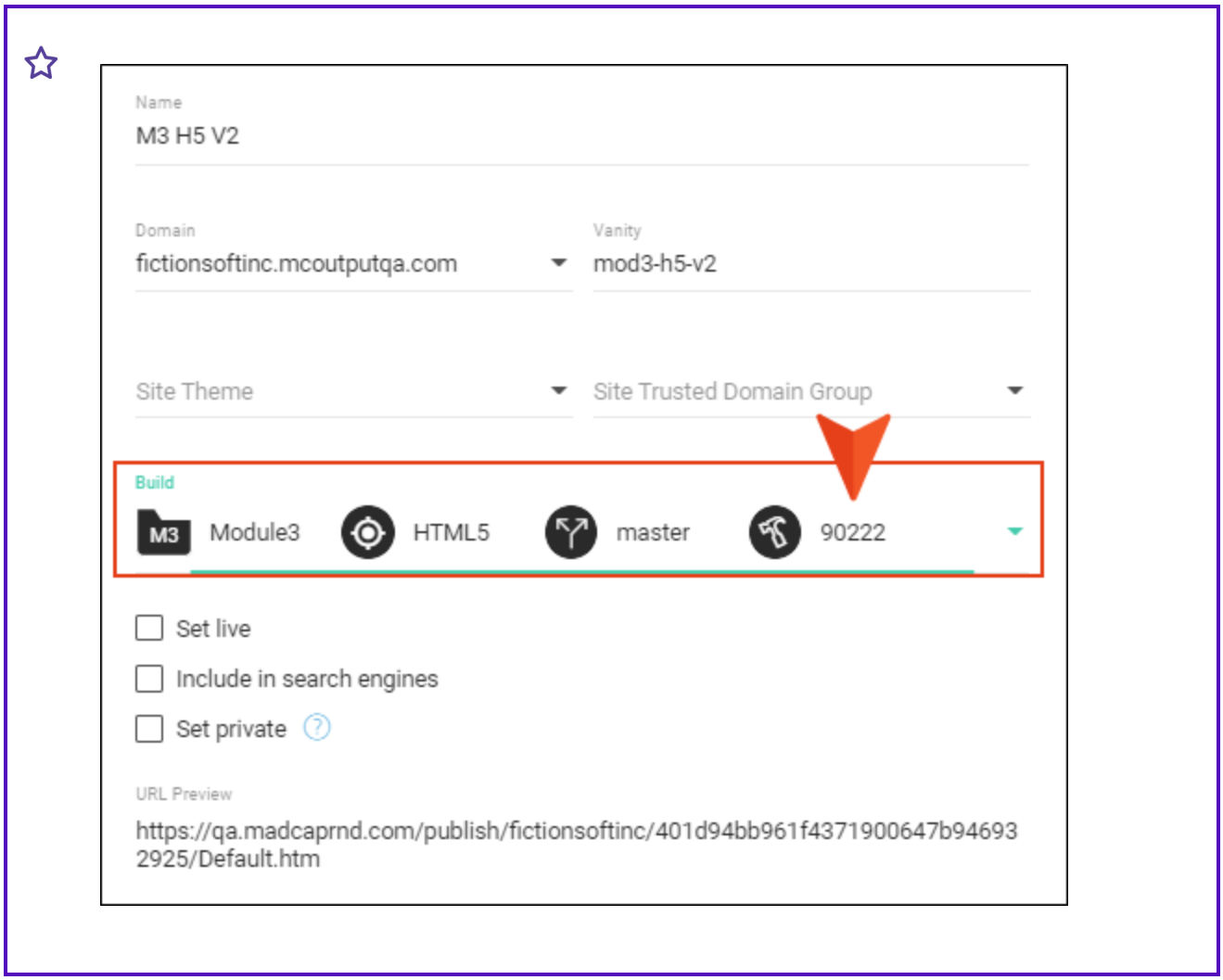
When the site row is expanded, you notice that the URL has the site vanity. This is also indicated in the Vanity column of the grid.



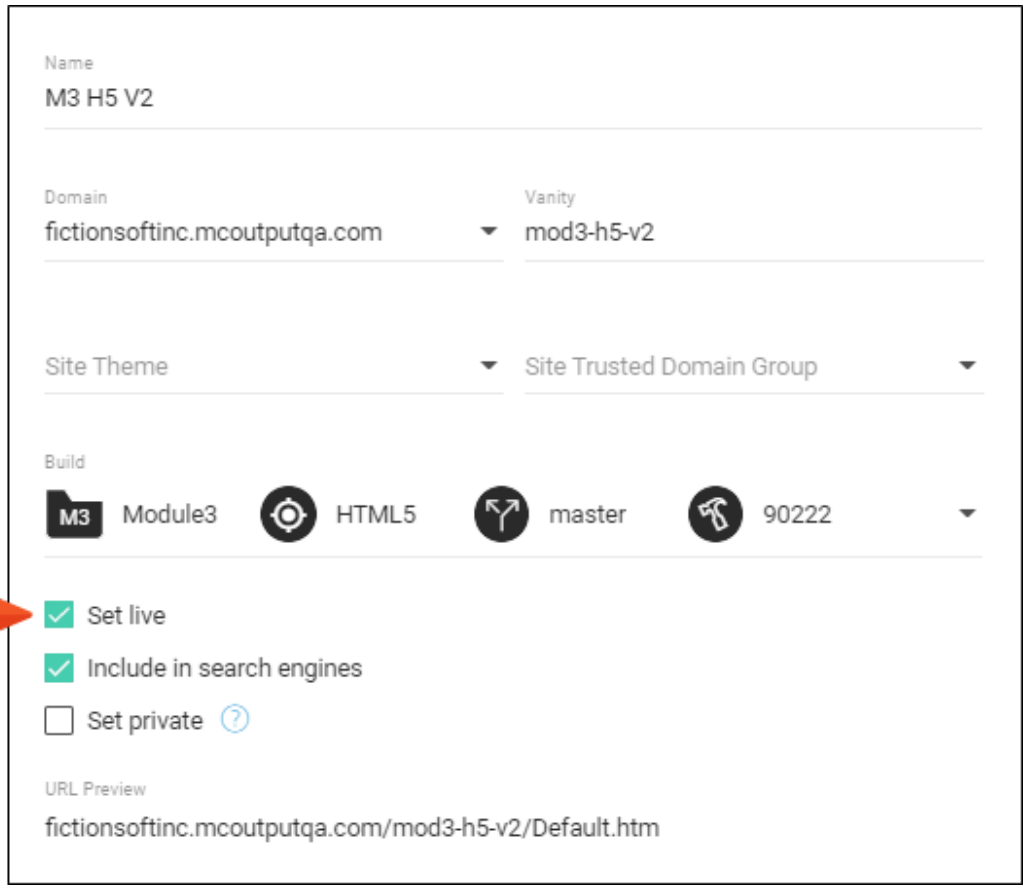
Sometime later, you are ready to publish output for Version 2. So you push your changes up to Flare Online and build the target again. You also create a new site and name it similar to the first one, except with a reference to Version 2 (M3 H5 V2). And it also has a site vanity named in the same way: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



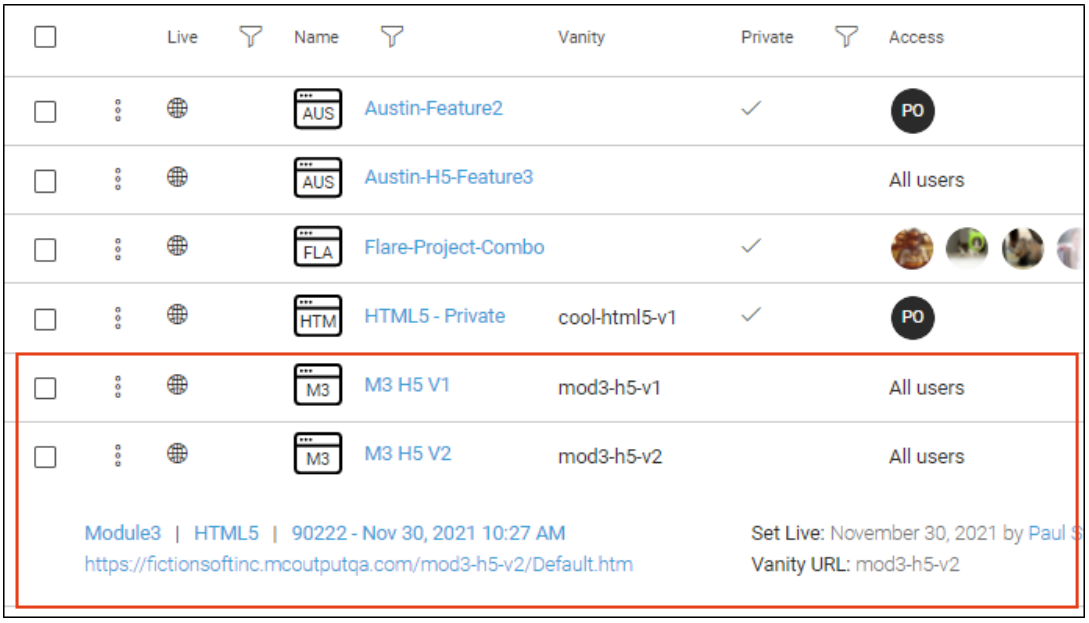
When selecting the build, you choose the Module 3 project, the HTML5 target, and the master branch. But this time, you choose the newer build for Version 2 that you know is ready for publication.


Name
M3 H5 V2
Domain
fictionsoftinc.mcoutputqa.com
Vanity
mod3-h5-v2
Site Theme
Site Trusted Domain Group
Build
M3
Module3
HTML5
master
90222
Set live
Include in search engines
Set private
URL Preview
https://qa.madcaprnd.com/publish/fictionsoftinc/401d94bb961f4371900647b94693
2925/Default.htm

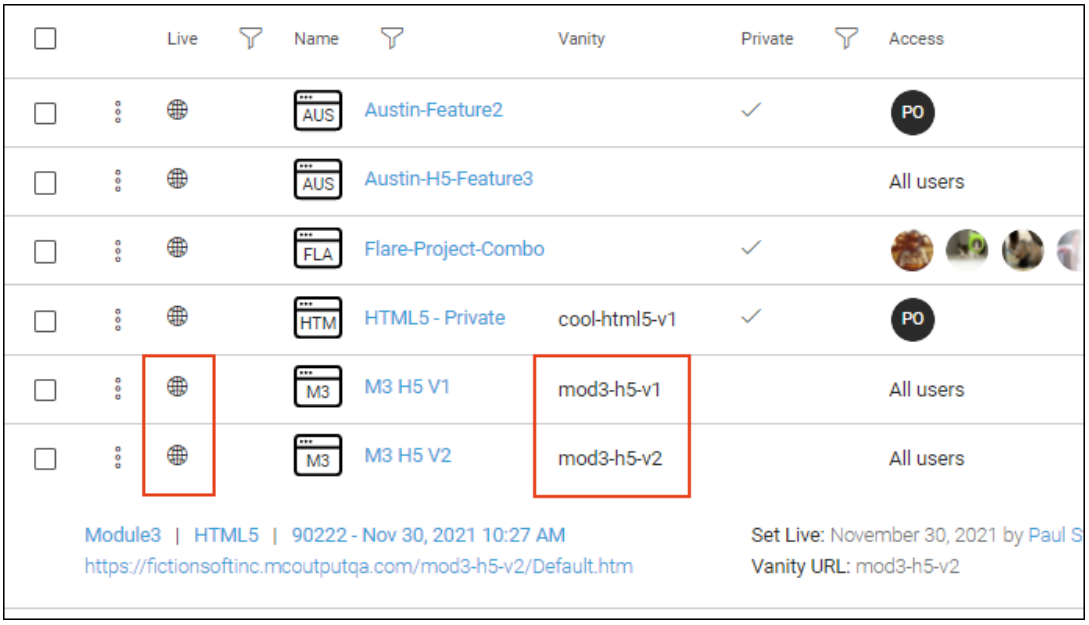
You also click **Live** to make the output available to your audience.



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



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



Setting Sites as Live

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

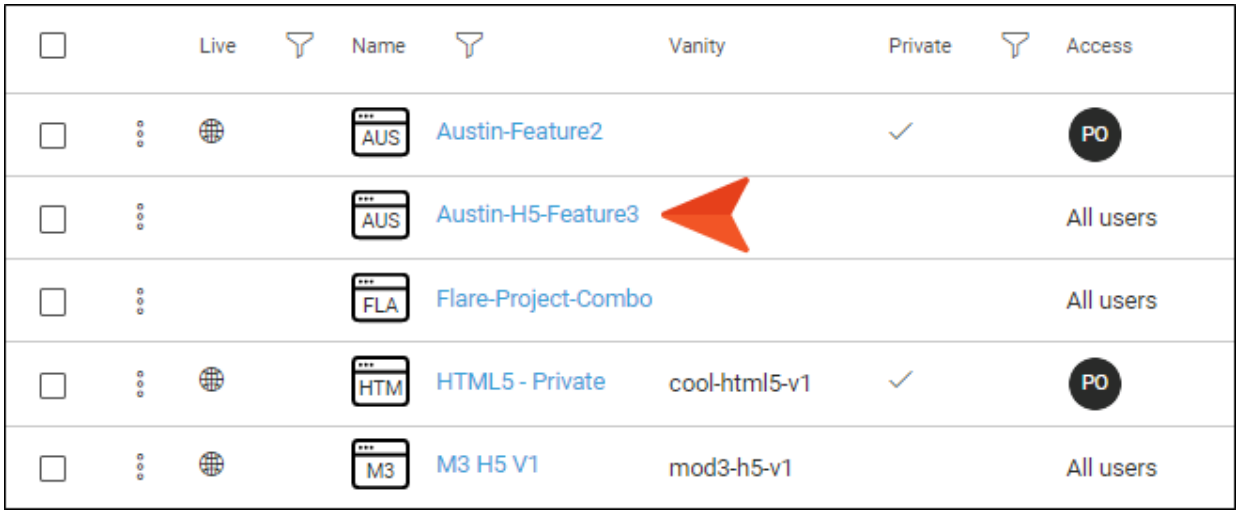
Permission Required?

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

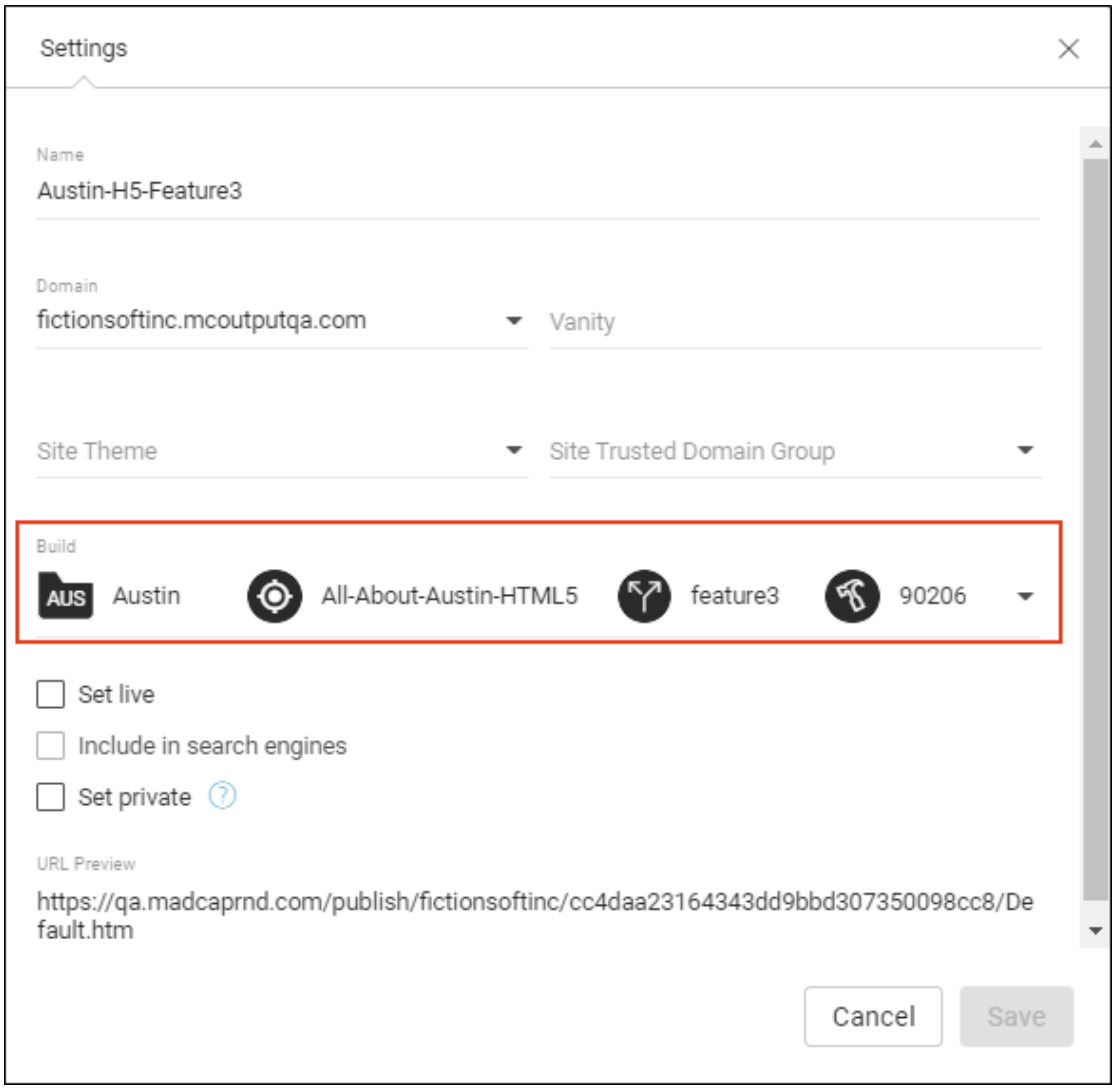
For more information about permissions, see the Help system.

How to Set a Site as Live

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

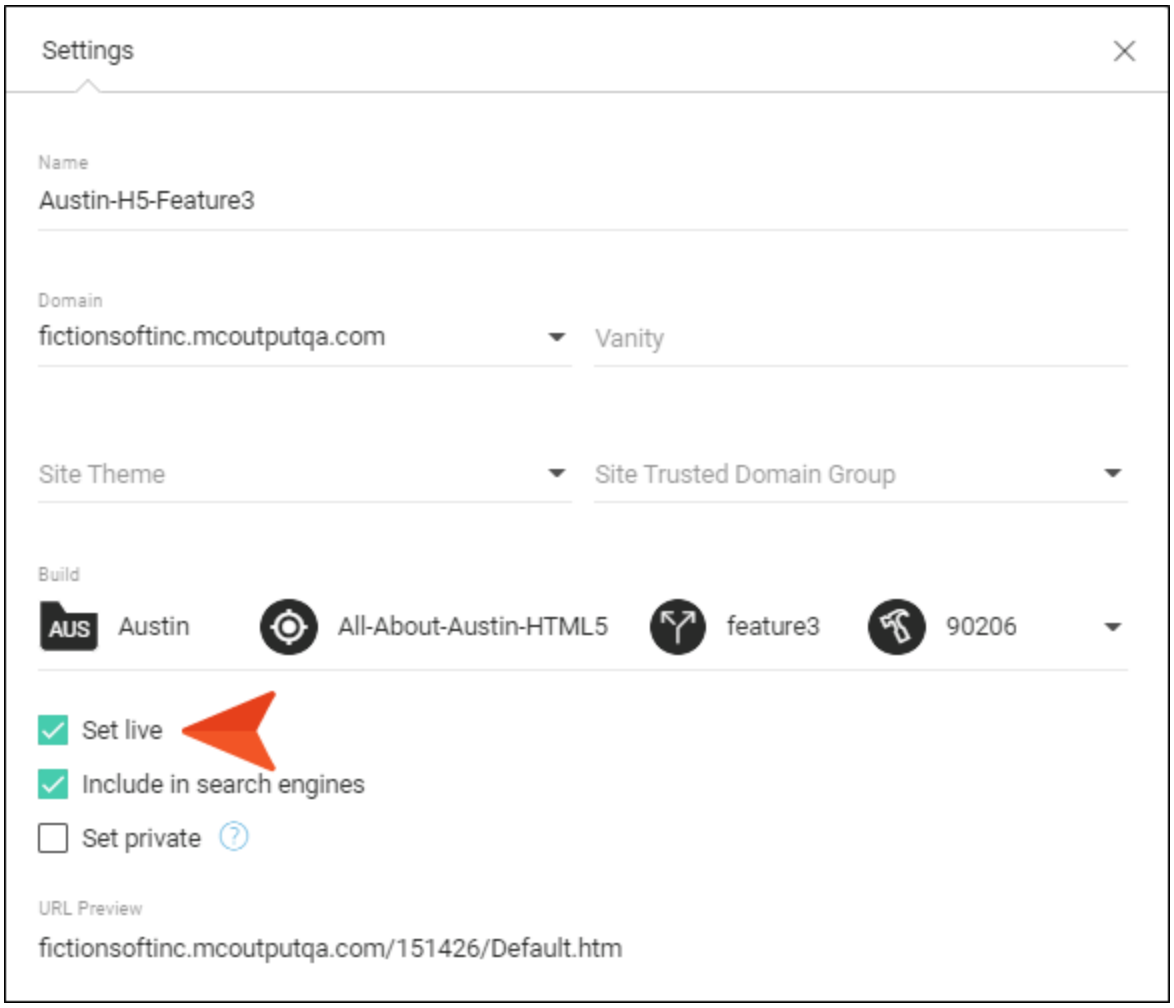


3. On the **Settings** page, click the **Build** field and select the project, branch, target, and build you want to be associated with the live site.

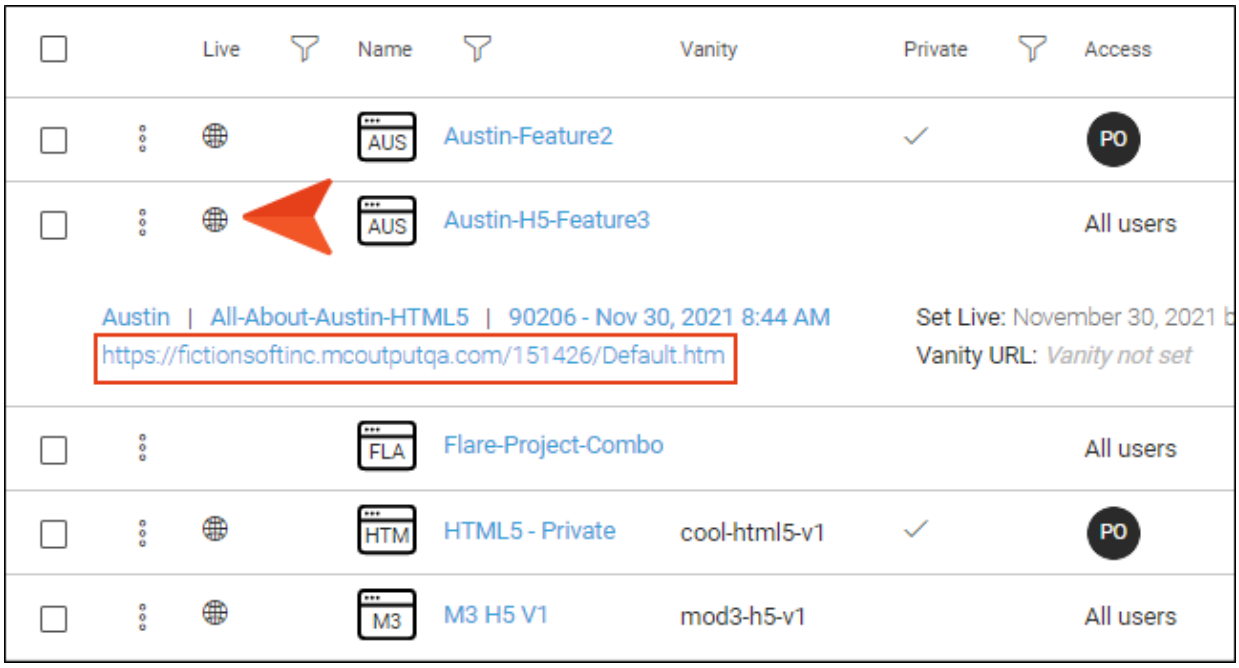


TIP Unless the live site is also set as private and intended for internal purposes in your company, it is recommended that you associate the live site with a specific build when creating or editing the site, rather than choosing the "Latest Build" option. Otherwise, a build that isn't yet ready to be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

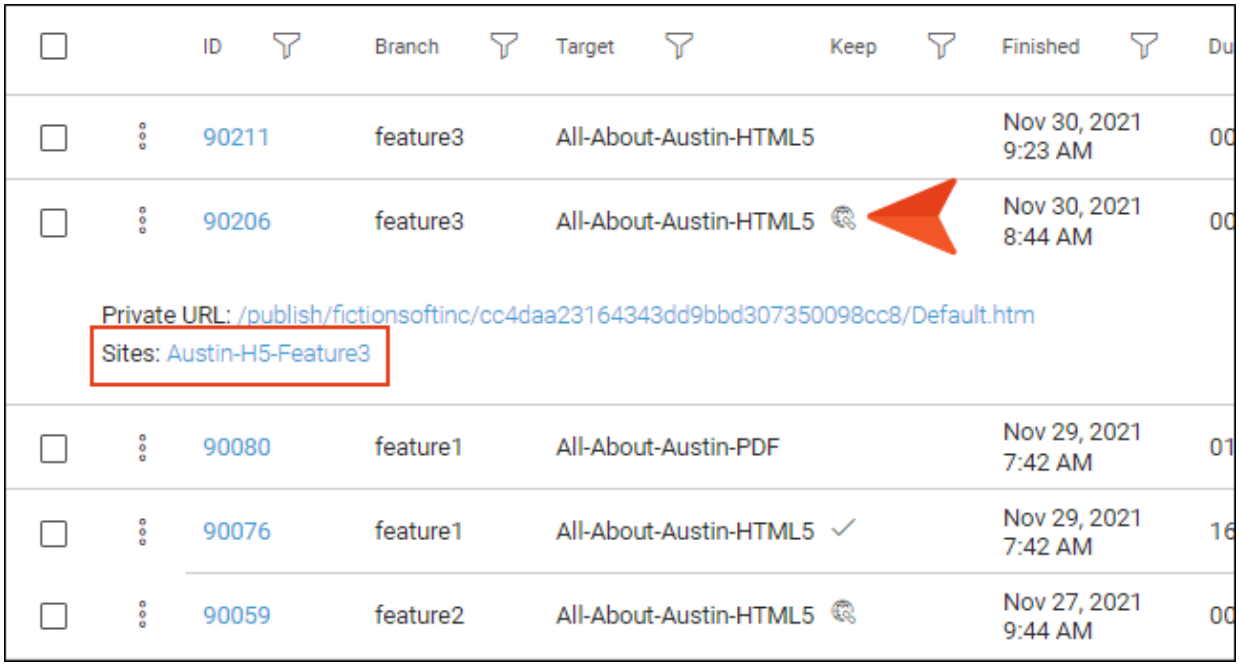
4. Select **Set live**.



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



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

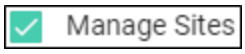


Rolling Back to a Previous Live Output

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

Permission Required?

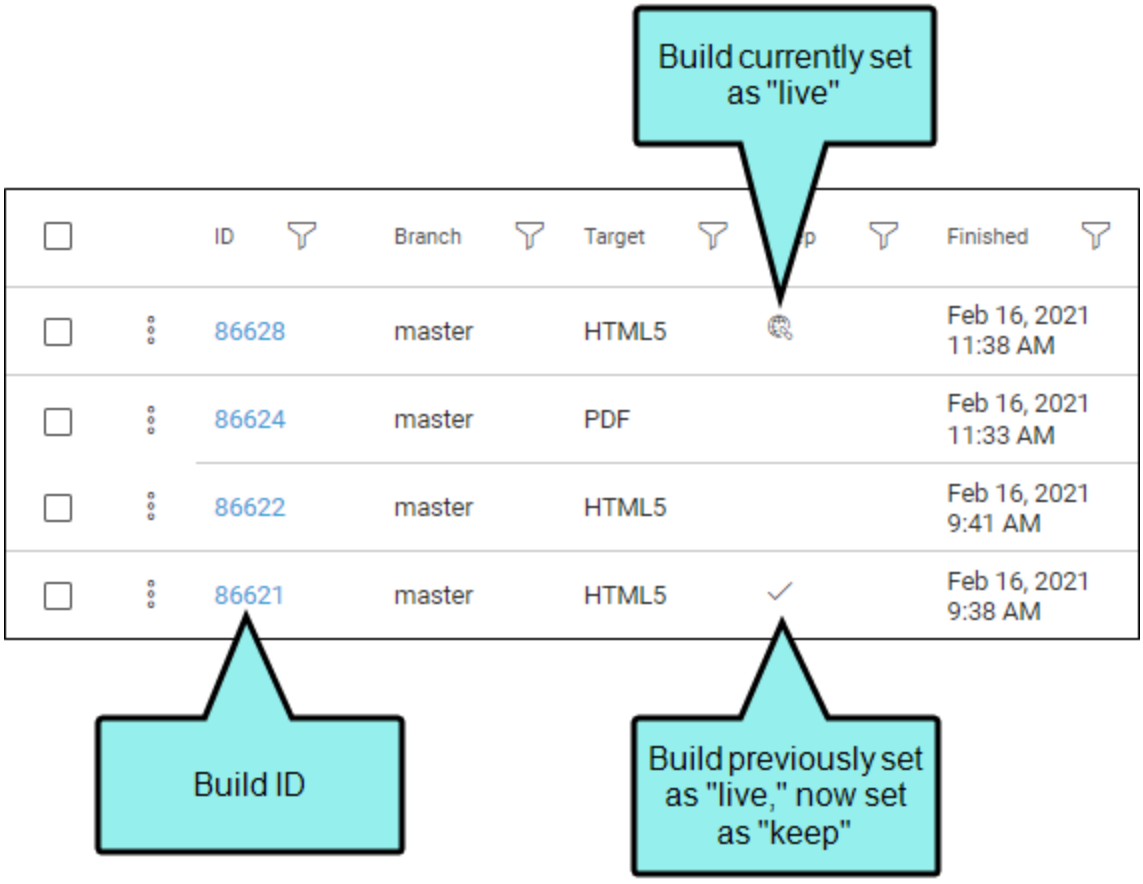
For this activity, you must have the following permission setting:



For more information about permissions, see the Help system.

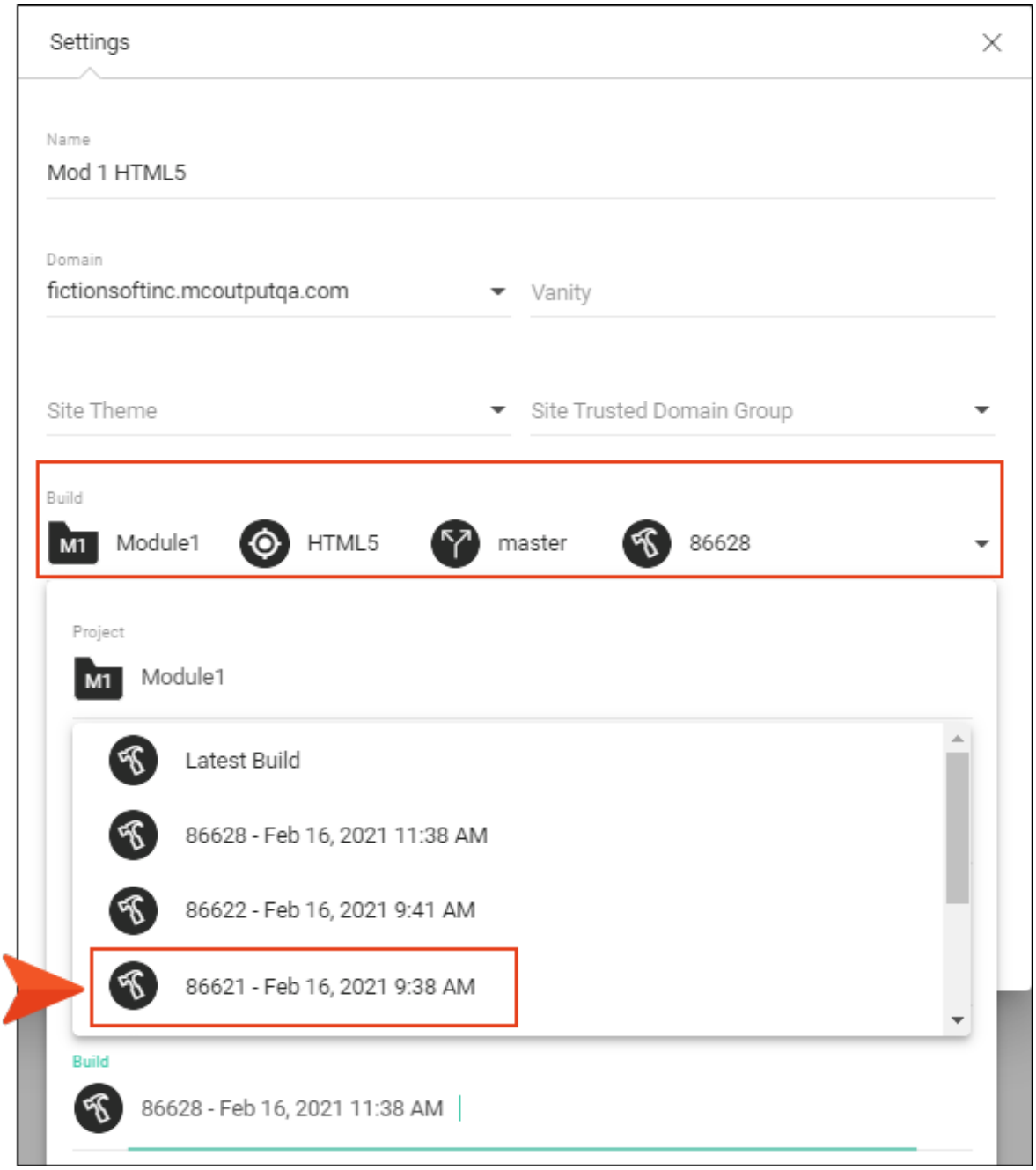
How to Roll Back to a Previous Live Output

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

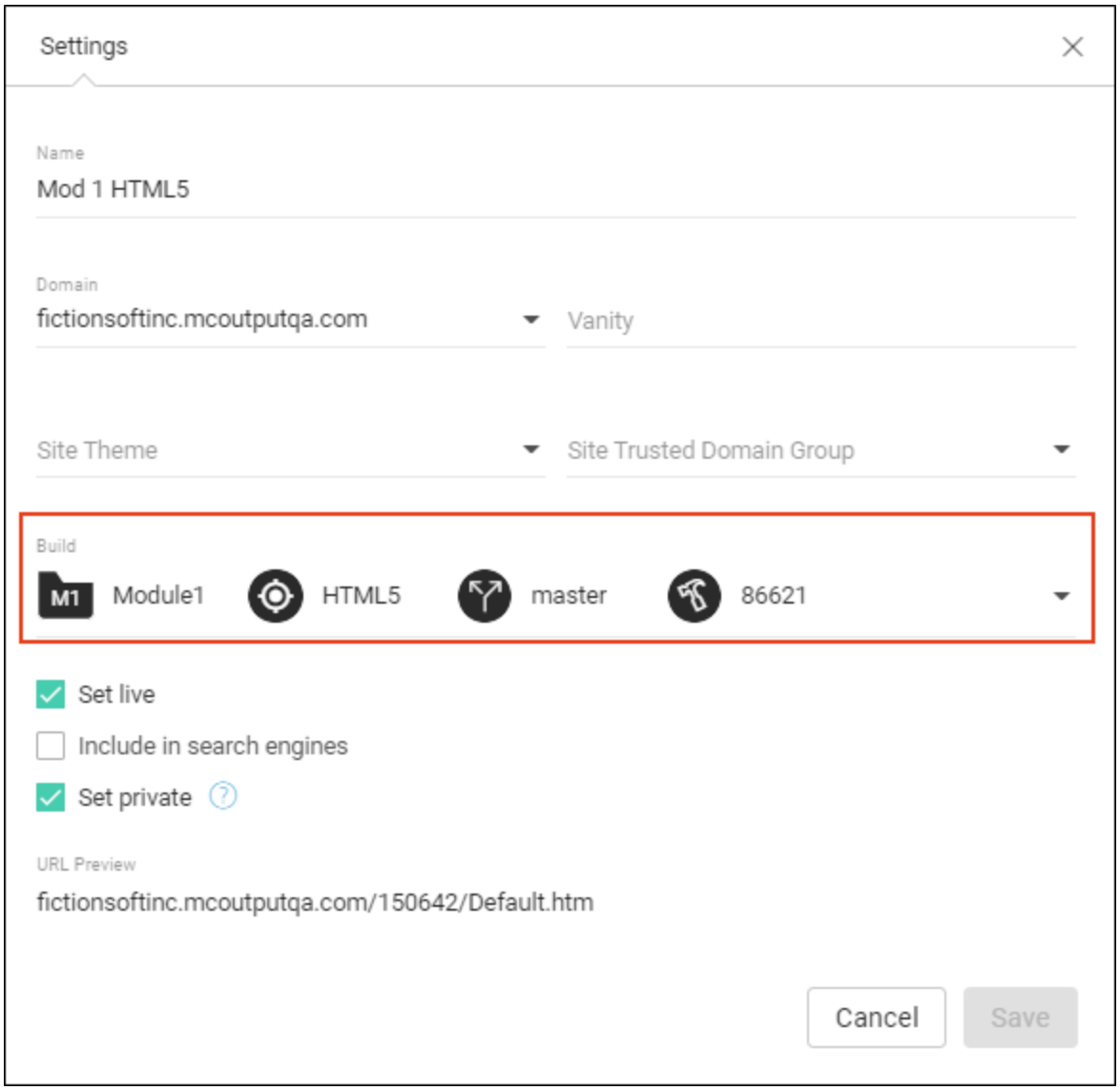


4. On the left side of the interface, click **Sites**.
5. Click the name of the site you want to edit.
6. On the **Settings** page, click the **Build** drop-down.

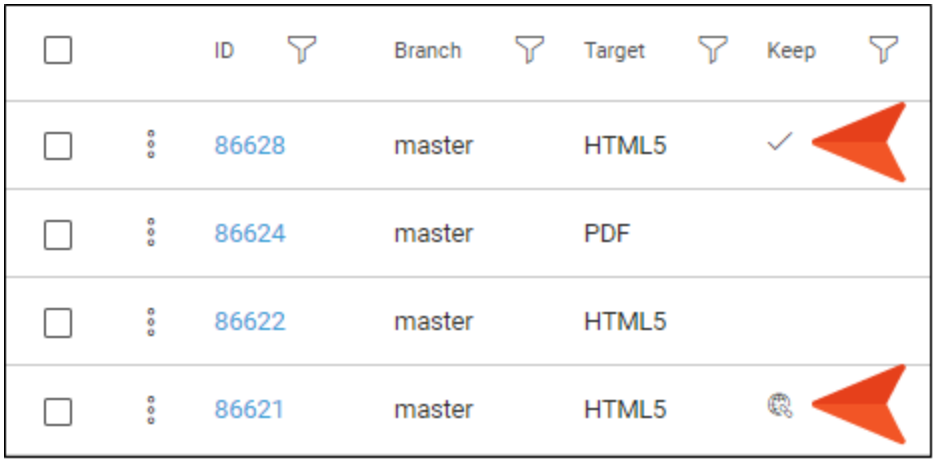
7. From the **Build** field at the bottom, select the build that was previously used for the live output (i.e., the one with the ID that you noted on the Builds page).



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



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



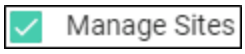
If you want to delete the build that you replaced, you can remove the keep setting on it (by clicking the three dots next to it and from the menu selecting **Toggle Keep**), and then remove the build.

Setting Sites as Private

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

Permission Required?

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



For more information about permissions, see the Help system.

How to Set Output as Private

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

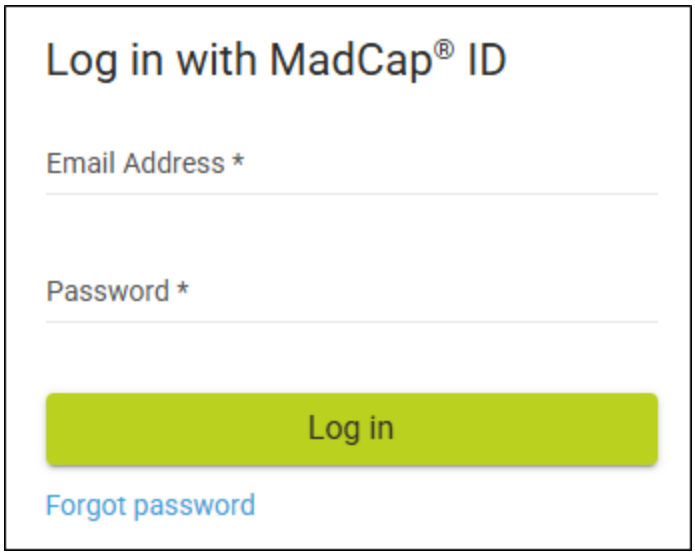
   > NOTE If the site is not set as "live," the private setting has no effect on the output. In other words, only authors will be able to access it; SMEs and viewers cannot see the output.

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

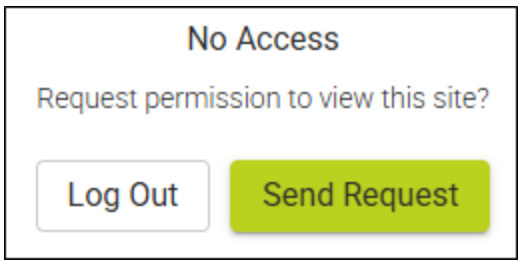
> NOTE If you have older published output and want to make it private, you might need to rebuild that output. Then associate the new build with the private site.

What Users See

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



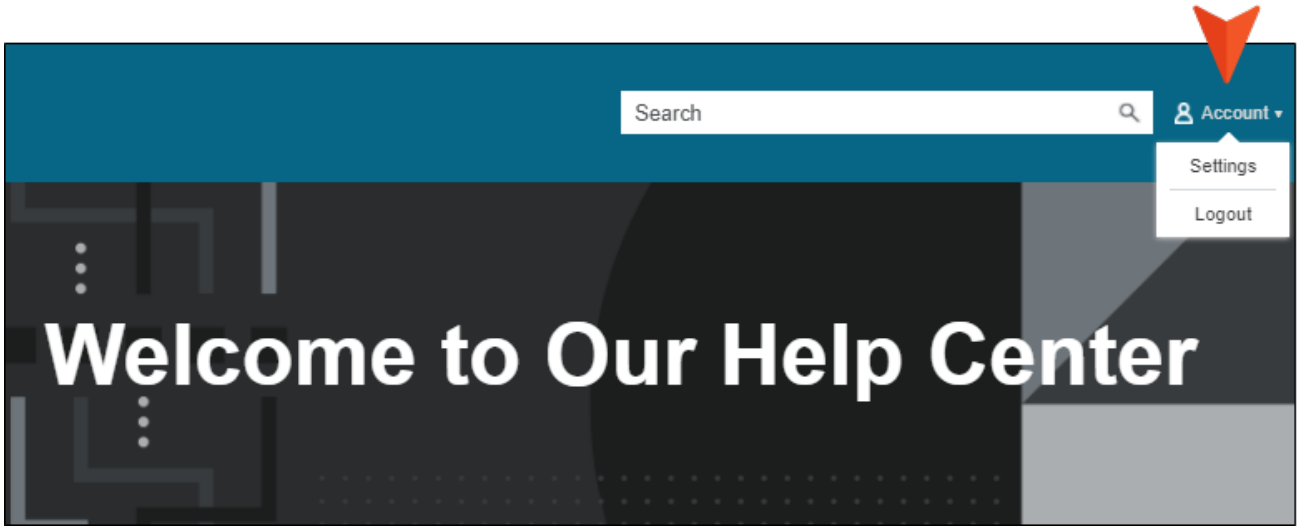
If the user is not associated with a team for the site, or if the team has no site associated with it, a "no access" message displays.



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

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

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



What's Noteworthy?

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

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

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

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

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

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

What's Next?

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

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

Associating Sites With Teams

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

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Associate a Site With Teams

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

Other Activities for Sites

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

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

Excluding Live Sites From Search Engines

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

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

Permission Required?

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

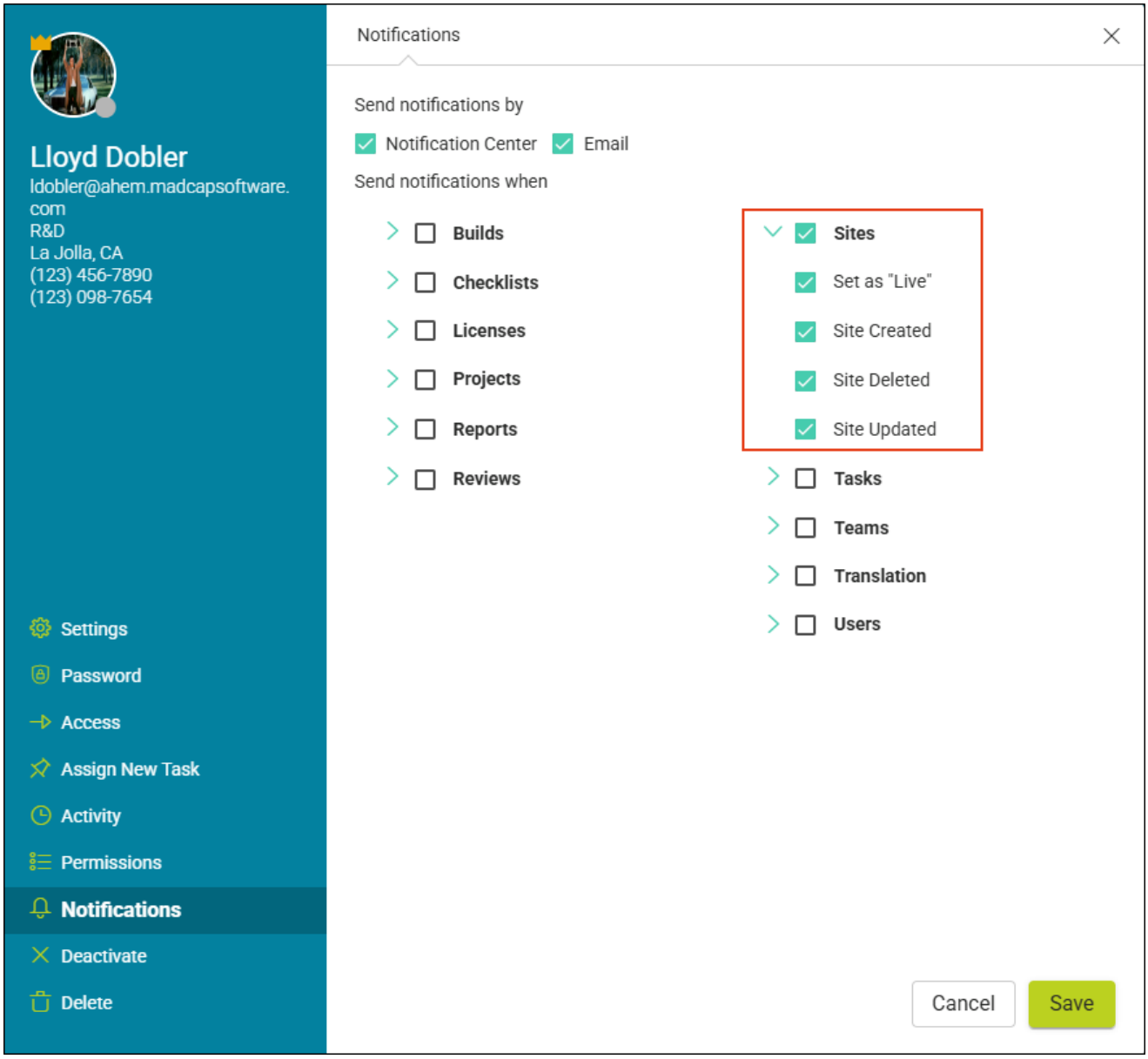
For more information about permissions, see the Help system.

How to Exclude a Site From Search Engines

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

Setting Notifications for Sites

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



Deleting Sites

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

Permission Required?

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

For more information about permissions, see the Help system.

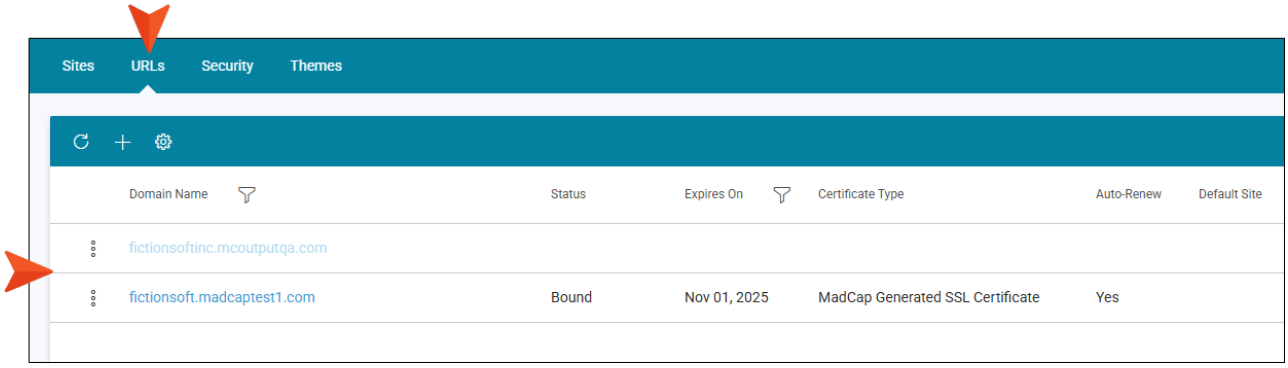
How to Delete a Site

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

CHAPTER 3

URLs Page View

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



This chapter discusses the following:

General Information for Domains 49

Main Activities for Domains 53

General Information for Domains

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

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

Default and Host Mapped Domains

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

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

  ☆ EXAMPLE

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

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

  ☆ EXAMPLE

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

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

  ☆ EXAMPLE

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

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

  ☆ EXAMPLE

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

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

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

Associating Domains With Sites

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

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

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

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

Main Activities for Domains

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

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

Setting the License Vanity

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

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

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

Permission Required?

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

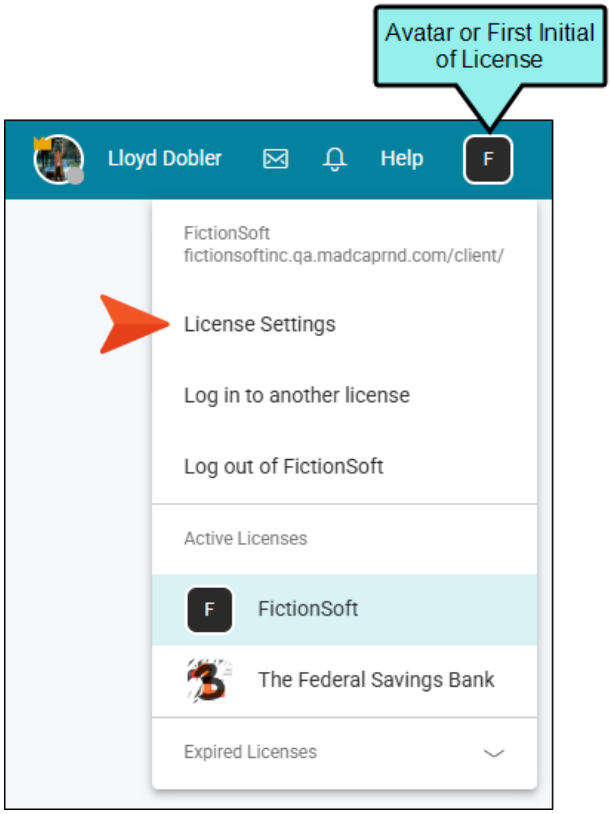
For more information about permissions, see the Help system.

How to Set the License Vanity

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

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

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



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

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

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

Adding Host Mapped Domains

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

Permission Required?

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

For more information about permissions, see the Help system.

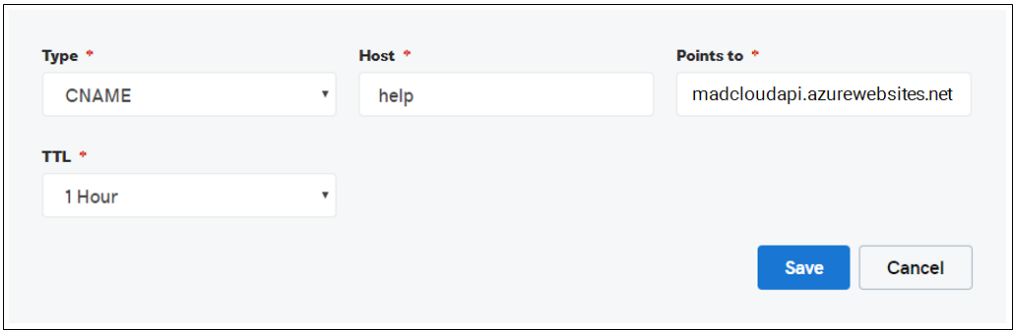
How to Add a Host Mapped Domain

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

   United States server API:

   ```
   madcloudapi.azurewebsites.net
   ```

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

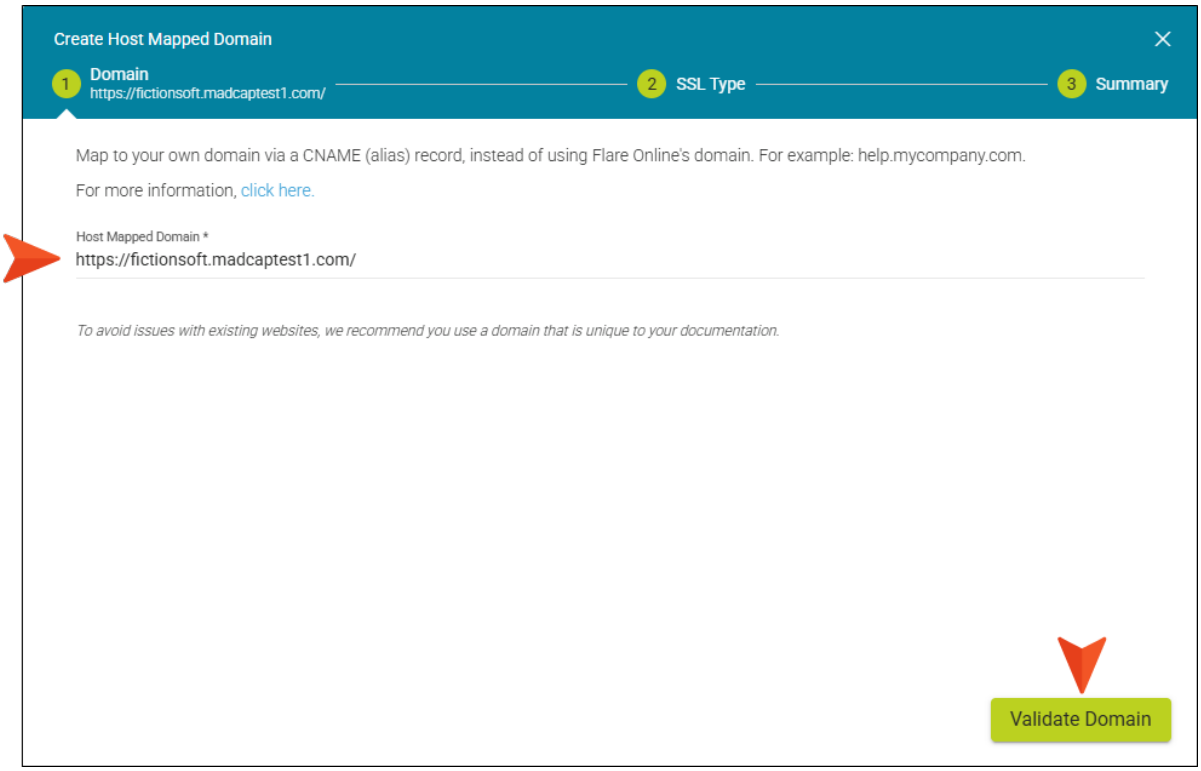
   European server API:

   ```
   api-eugwc-prod.azurewebsites.net
   ```

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

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

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



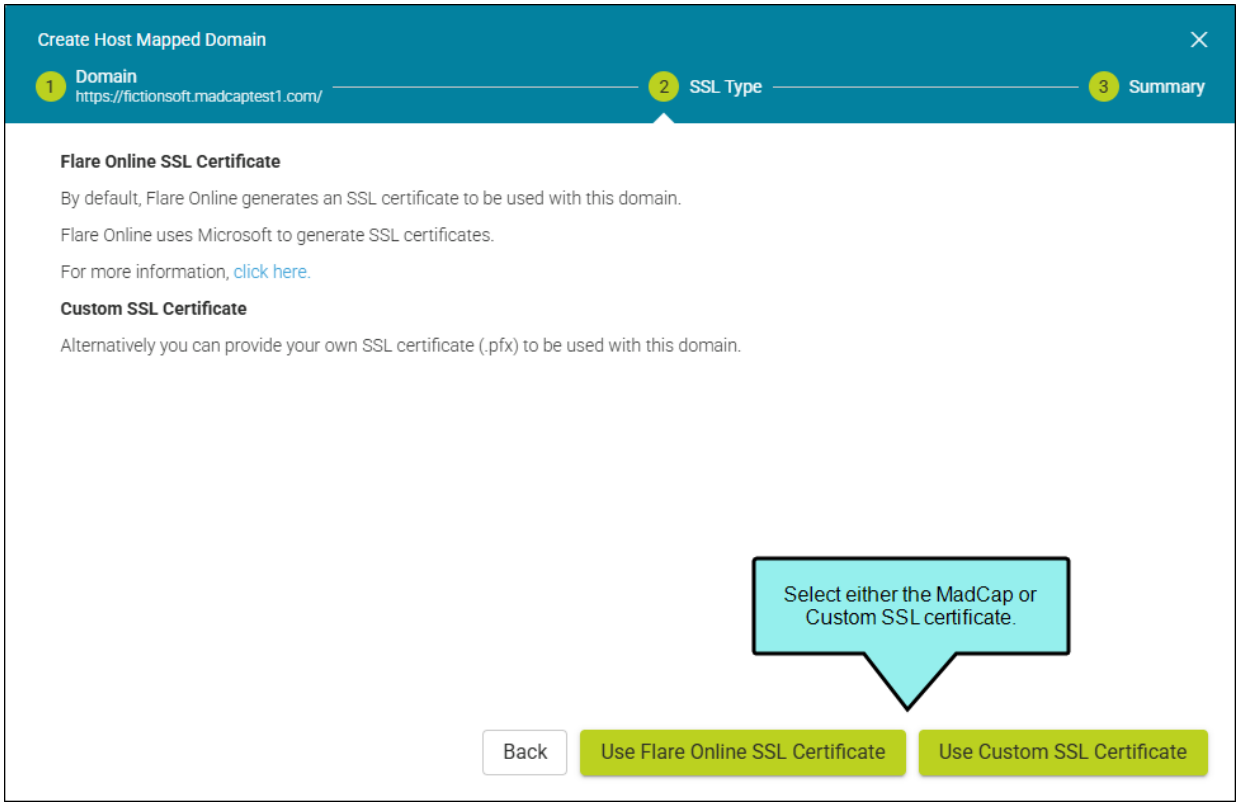
NOTE When entering a host mapped domain, you might encounter an error if the name is too long. To avoid this problem, the entire domain including a subdomain must be 63 characters or less.

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

6. Choose an SSL certificate.

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

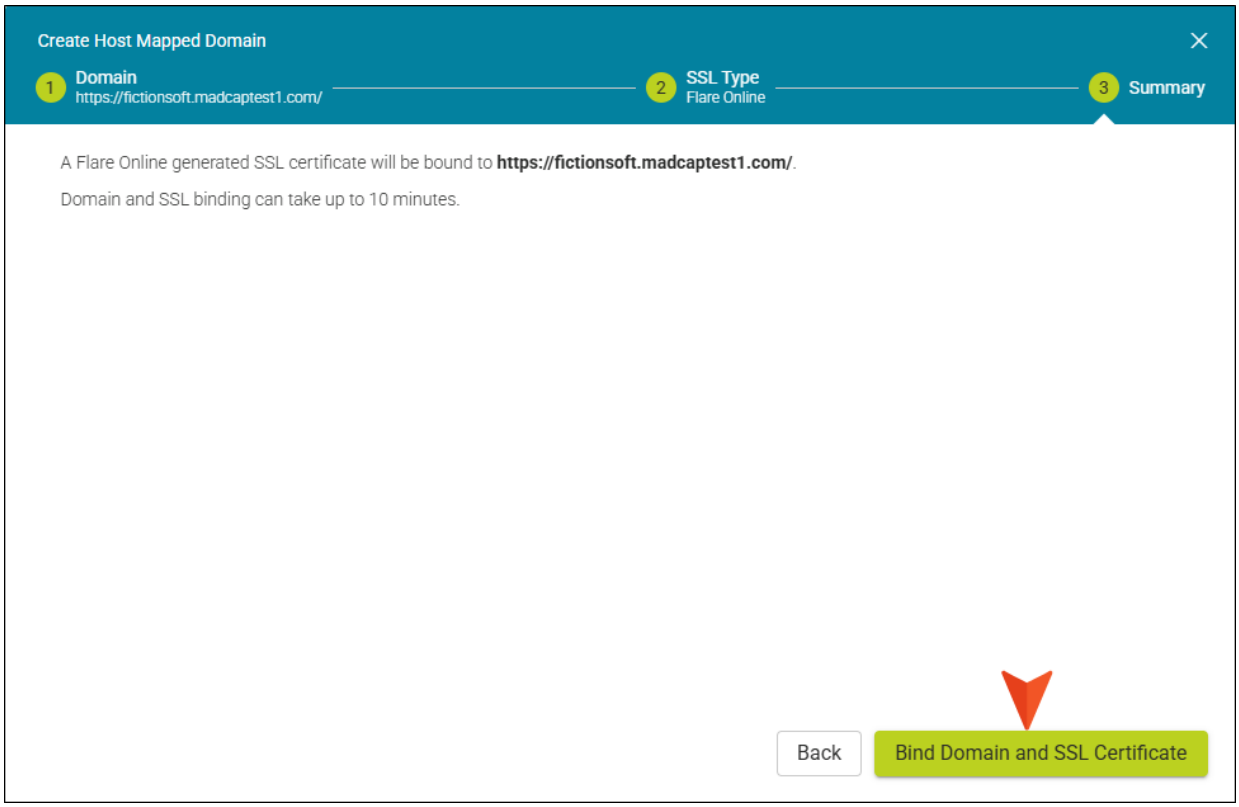
     NOTE Flare Online supports only PFX certificates that require passwords.



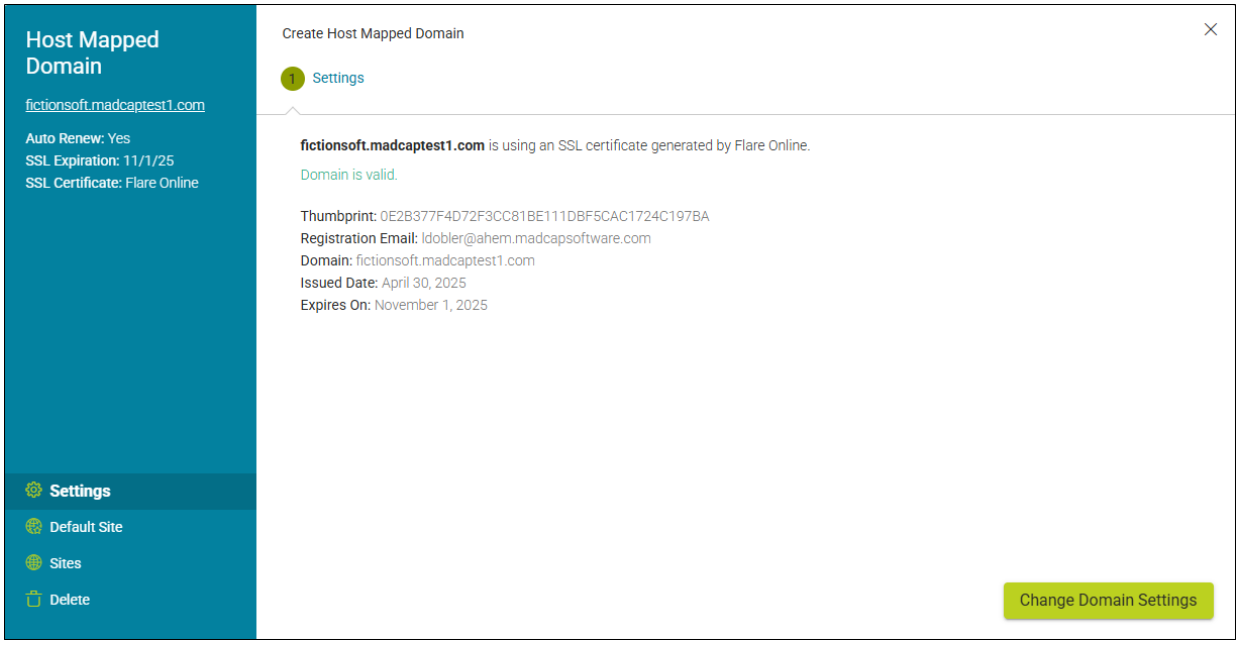
NOTE It is recommended that you generate only one certificate in a 24-hour time period.

NOTE Flare Online uses Microsoft Azure to generate SSL certificates.

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



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



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

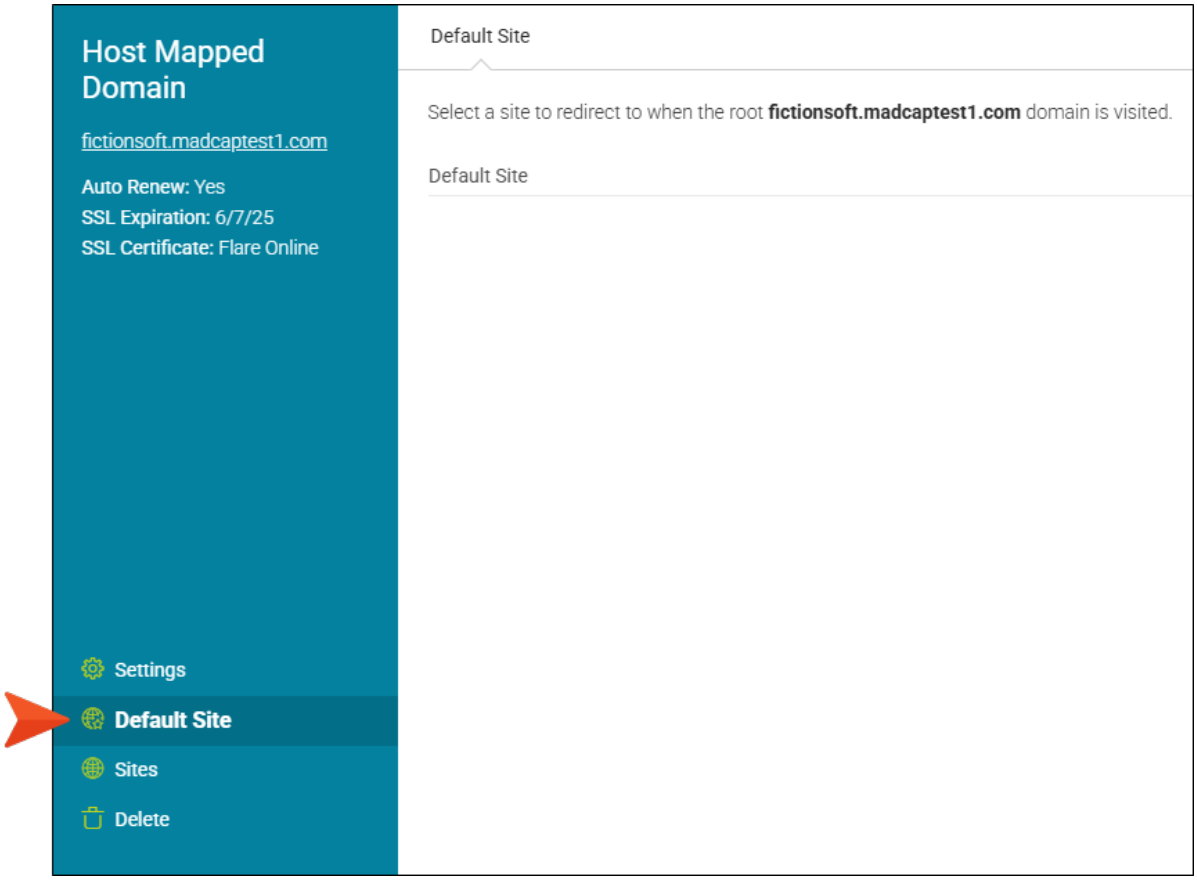
8. Click the x in the upper-right corner to close the wizard.

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

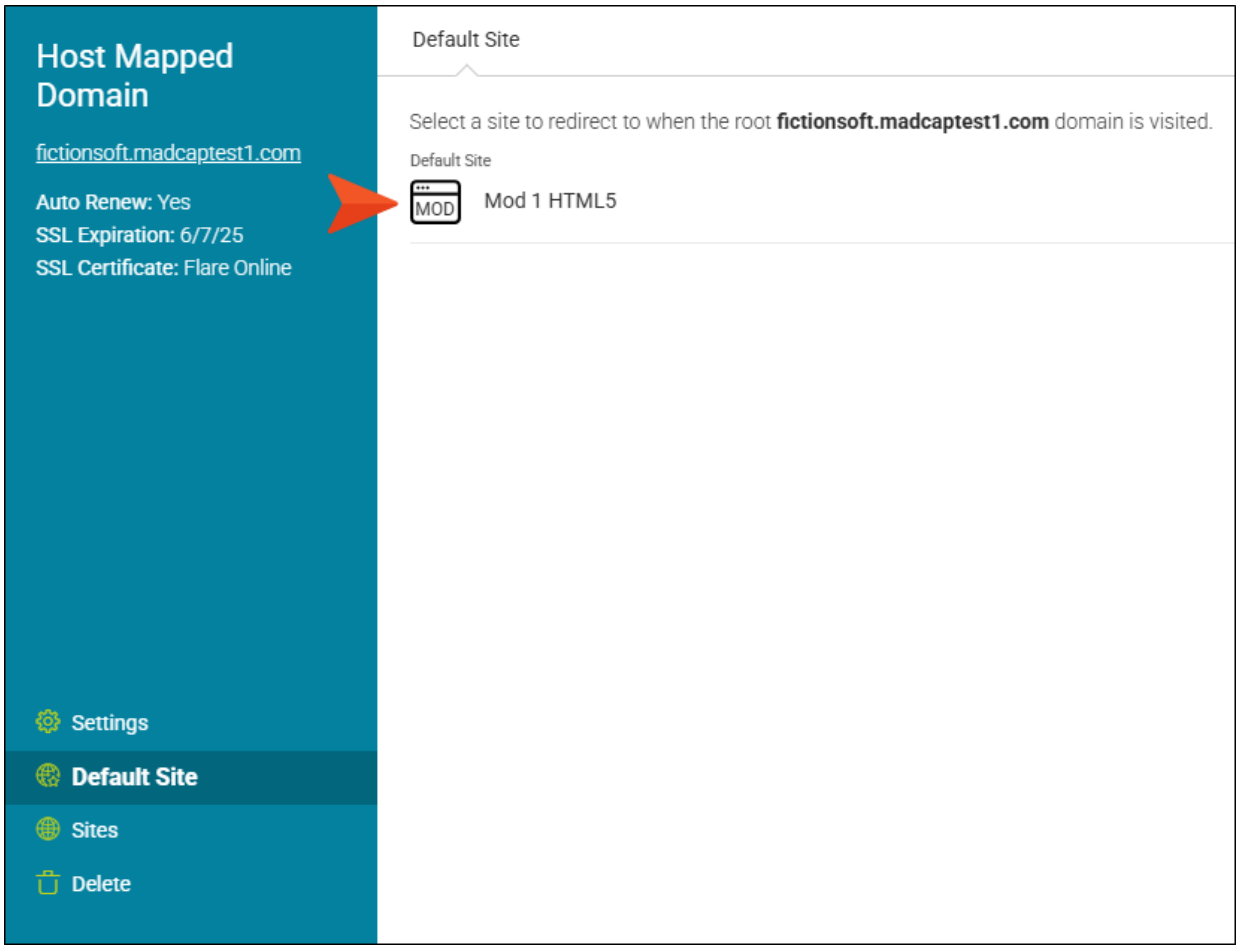
How to Add a Default Site

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

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



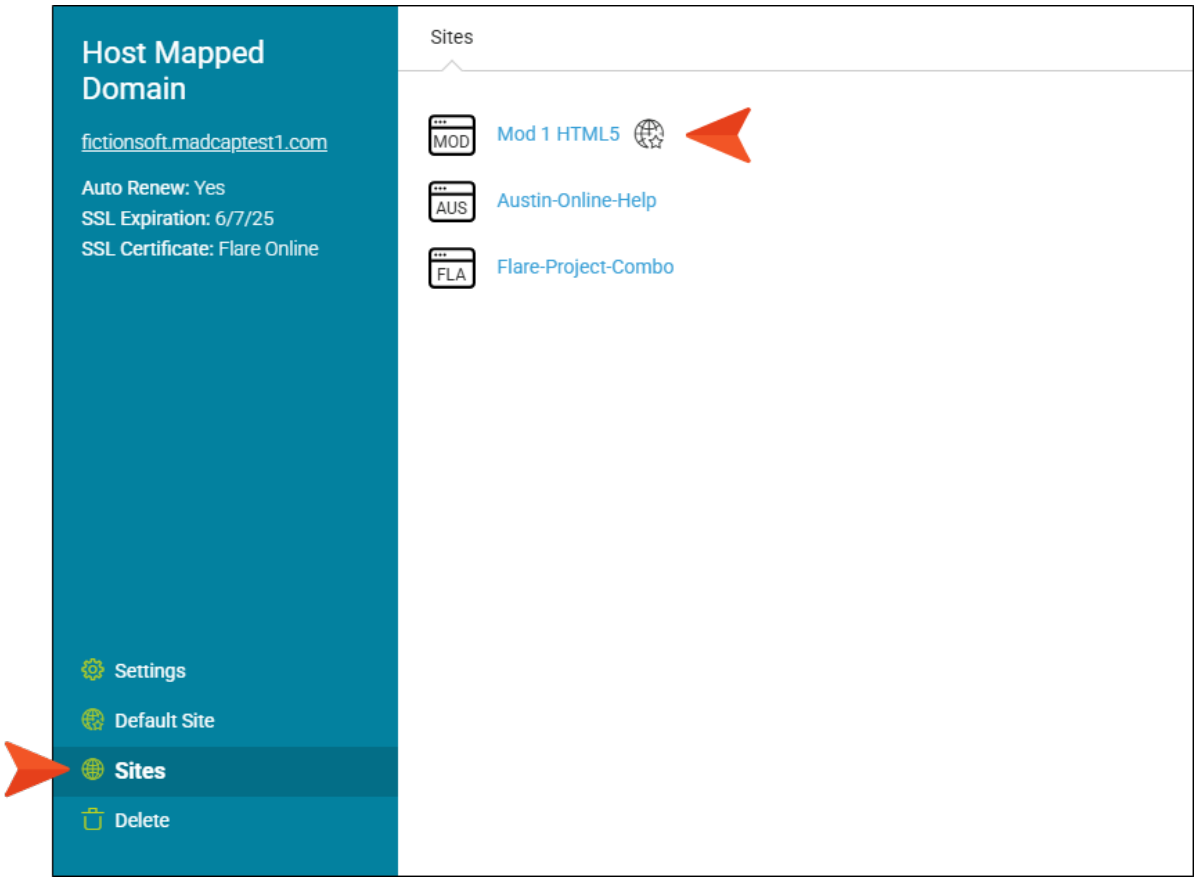
5. From the **Default Site** drop-down, select a site.



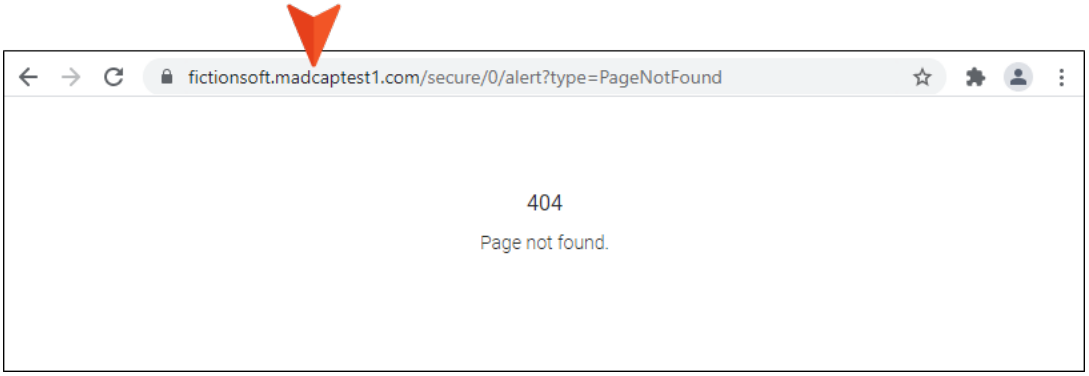
> NOTE Make sure the site you select is also associated with a custom domain.

6. Click **Save**.

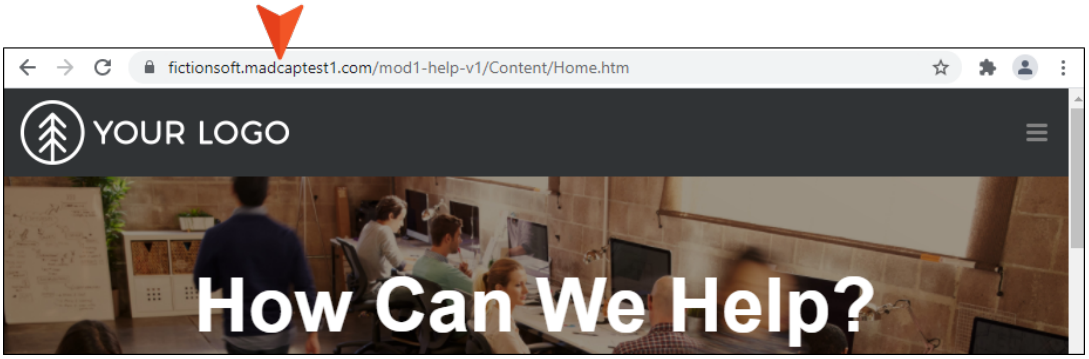
7. (Optional) You can quickly see which sites are associated to the host mapped domain by clicking **Sites**. The wizard lists the sites. If a site is set as the current default site, it is indicated as such by a globe/star icon.



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



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



Editing Host Mapped Domains

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

Permission Required?

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

For more information about permissions, see the Help system.

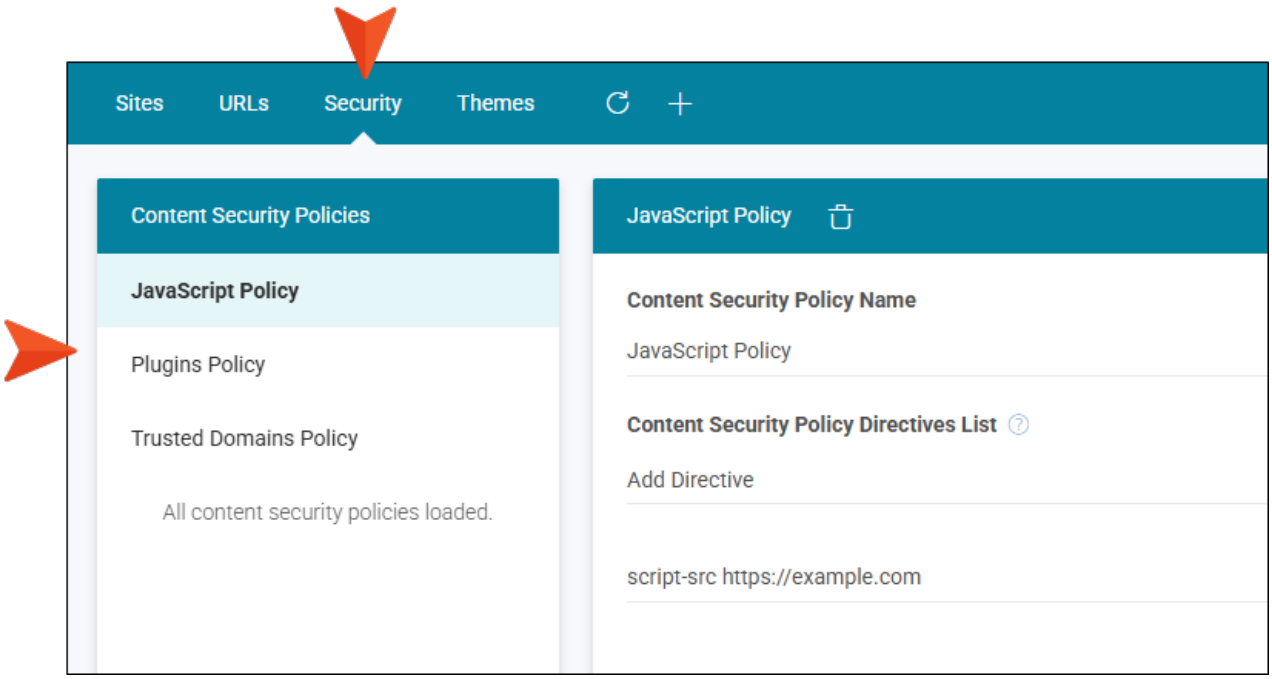
How to Edit a Host Mapped Domain

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

CHAPTER 4

Security Page View

The Security view of the Sites page lets you create custom security policies. These policies can contain as many directives for security headers as you need.



NOTE MadCap Flare Online provides some security headers by default, and these cannot be removed.

This chapter discusses the following:

Permission Required? 69
Why Add Content Security Policies? 70
What About Pre-existing Trusted Domains? 71
How to Create a Content Security Policy 71
Directive Examples 72
What's Next? 73

Permission Required?

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

For more information about permissions, see the Help system.

Why Add Content Security Policies?

The most obvious reason to add your own content security policies is that it makes your hosted output more secure by giving you control over which dynamic resources can be loaded. Also, your company might need the hosted output to pass certain compliance testing, and setting up your own directives for security headers will help.

What About Pre-existing Trusted Domains?

If you previously set up a trusted domain on your license, you'll notice that Flare Online has automatically converted it to the appropriate directive (e.g., frame-ancestors 'self' https://somecompany.com).

How to Create a Content Security Policy

1. On the left side of the interface, click **Sites**.
2. Select the **Security** tab at the top.
3. In the toolbar, click .
4. Enter a name for the policy.
5. Click **Save**. The policy is added on the left side of the page.
6. Under **Content Security Directives List**, click **Add Directive**.
7. Type the directive, and then on the right click .

   NOTE You can type multiple directives on the same line, adding a space between each one. Otherwise, you can add a separate line for each directive.

8. At the bottom of the interface, click **Save**.
9. You can repeat the previous three steps to add as many directives as you need for that policy.

NOTE If you need to rename the policy, you can do so by typing a new name in the **Content Security Policy Name** field, then clicking **Save** at the bottom.

Directive Examples

There are many types of directives that you can add for security headers.

EXAMPLES

Trusted Domain

frame-ancestors 'self' https://somecompany.com

JavaScript Source

script-src https://example.com

Plugin Source

object-src 'self'

EXAMPLE Trusted Domain

The documentation team at MadCap Software has some online output hosted on their Flare Online license. The company's web manager wants to add an IFrame to the madcapsoftware.com website that displays a page of the documentation team's Flare Online-hosted output.

In Flare Online the documentation team creates a content security policy and names it "Trusted Domains Policy." They add the following directive in that policy:

```
frame-ancestors 'self' https://madcapsoftware.com
```

This allows the madcapsoftware.com website to display that content, which is hosted in Flare Online.

NOTE A couple of good sources for explanations and examples of various types of content security directives are:

https://content-security-policy.com/

https://developer.mozilla.org/

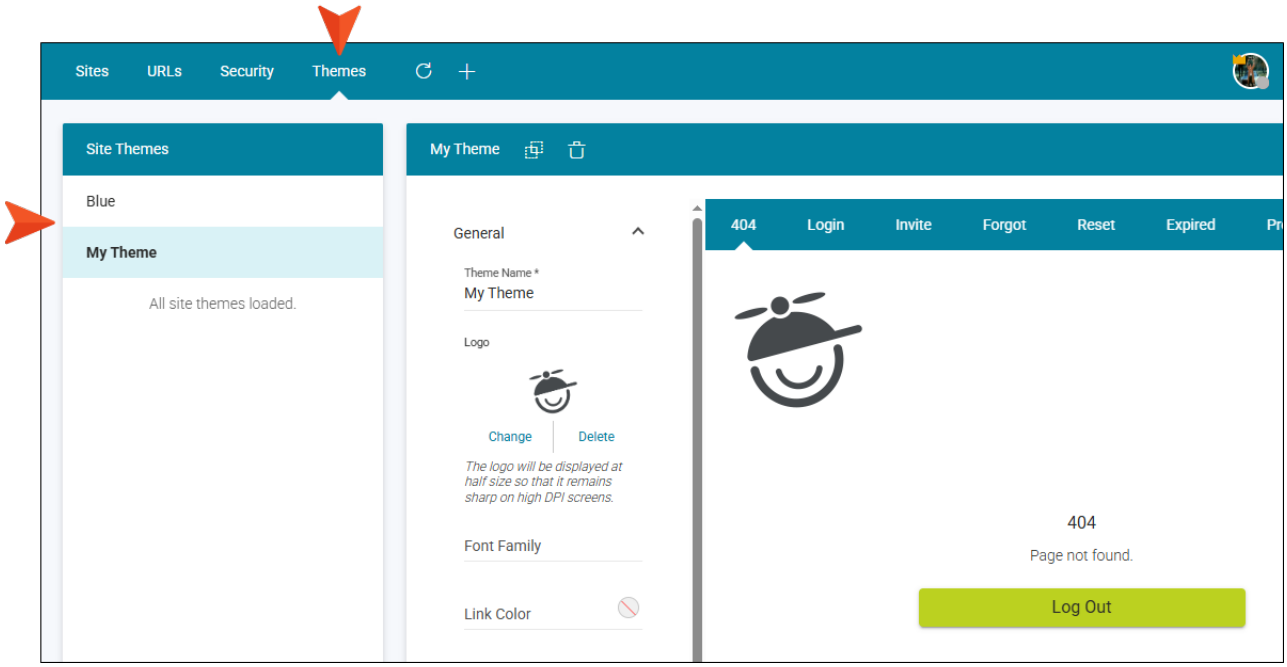
What’s Next?

After you create a content security policy, you can associate it with a site, and this will be shown in a column on the Sites page. See "Creating Sites" on page 9 and "Editing Sites" on page 13.

CHAPTER 5

Themes Page View

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



This chapter discusses the following:

Creating Themes 76
Editing Themes 84
Duplicating Themes 85
Deleting Themes 86

Creating Themes

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

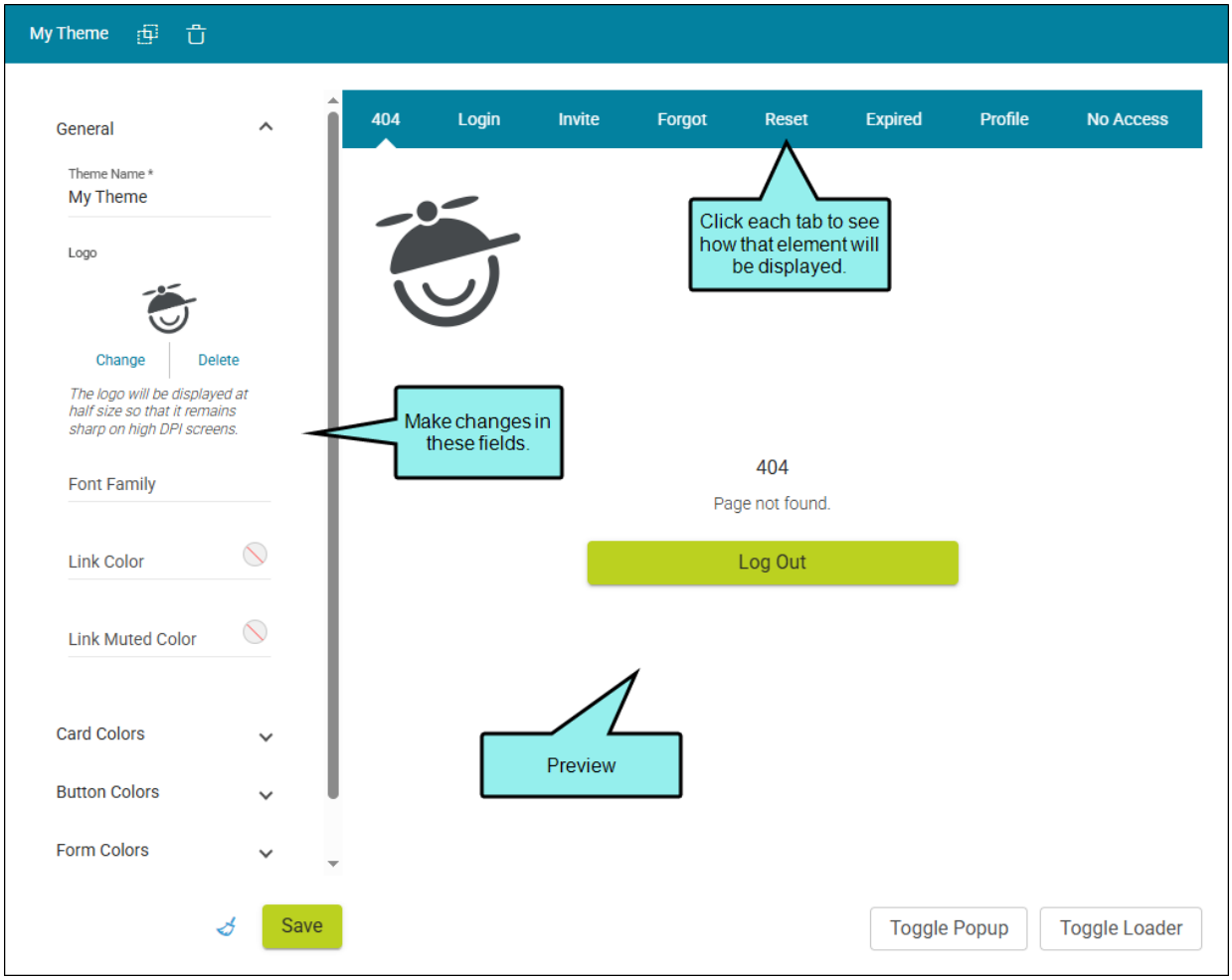
Permission Required?

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

For more information about permissions, see the Help system.

How to Create a Theme

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



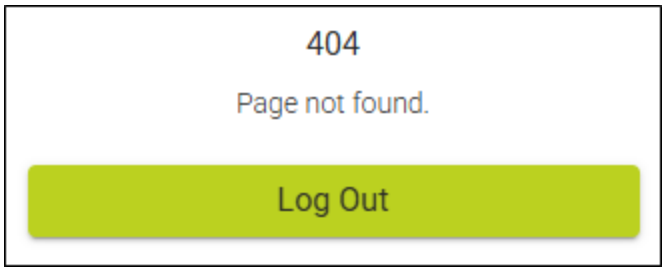
NOTE You cannot modify the actual text that is shown on the different theme pages, including the "MadCap ID" text that is shown at times.

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

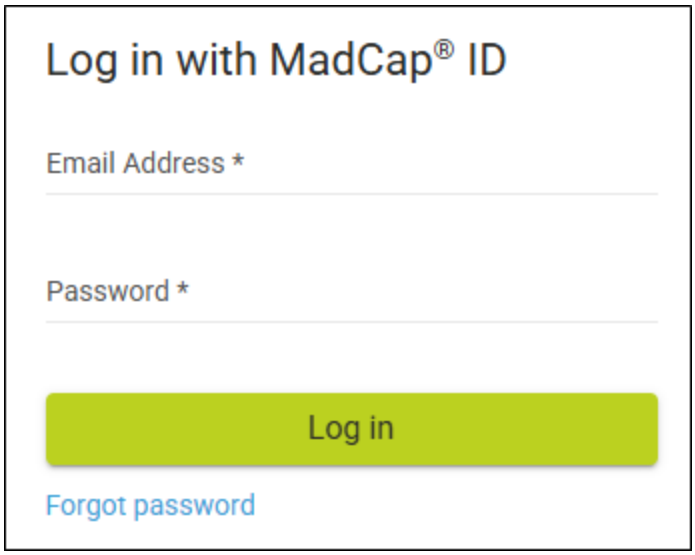
For login pages, the license avatar and name are shown above the login button.

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

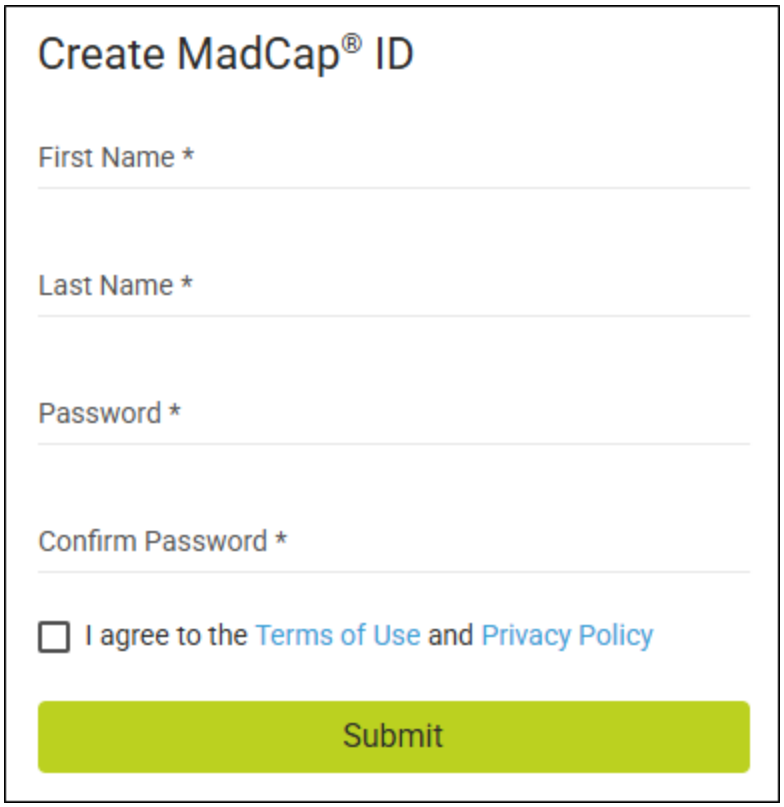
- 404 The text and button that users see when the page cannot be found



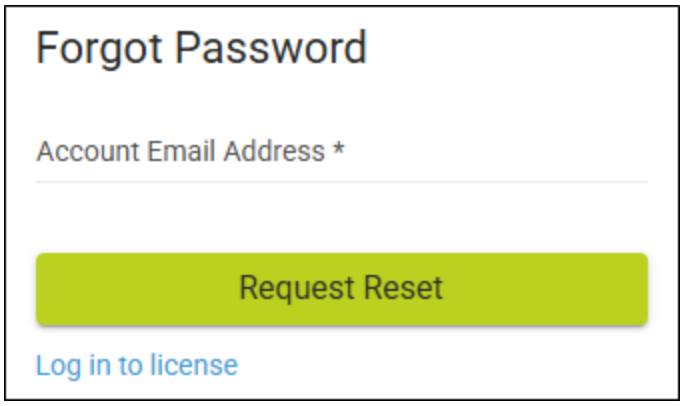
- Login The login fields users first see when they open the output



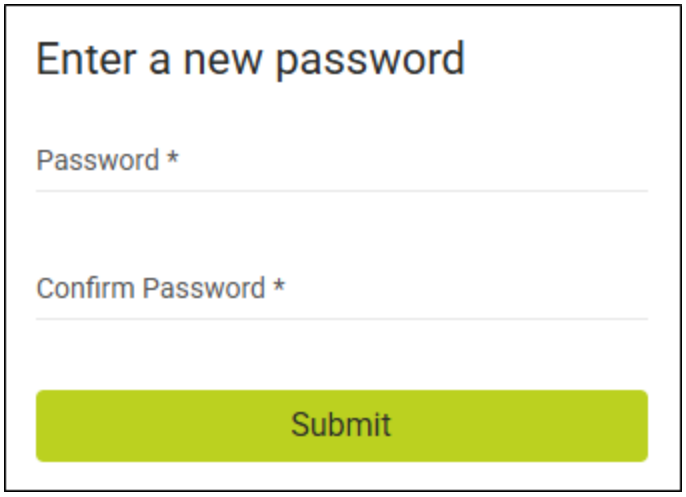
- Invite The fields users see when completing their invitation and set a password for Flare Online



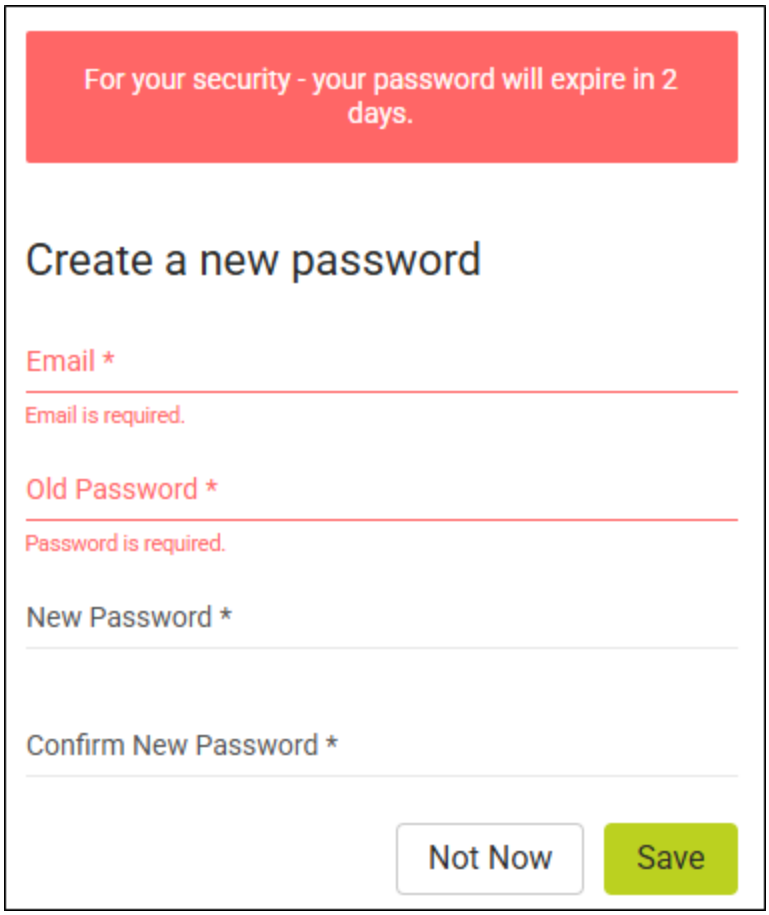
- Forgot The fields users see when requesting a password reset



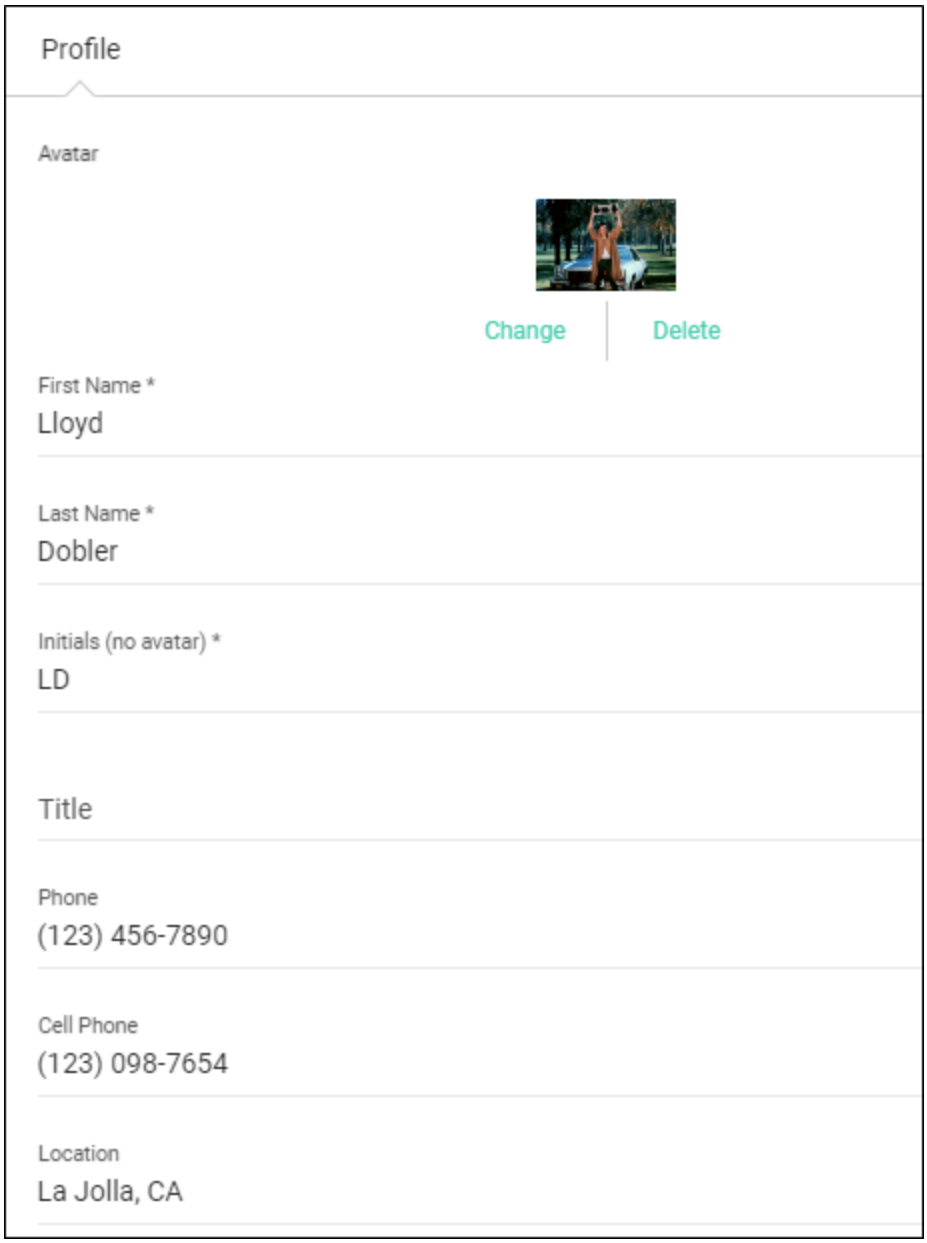
- Reset The fields users see when resetting a password



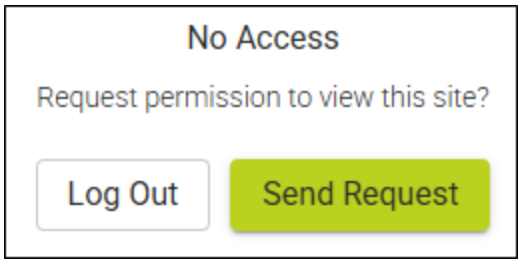
- **Expired** The fields users see when a password is about to expire



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

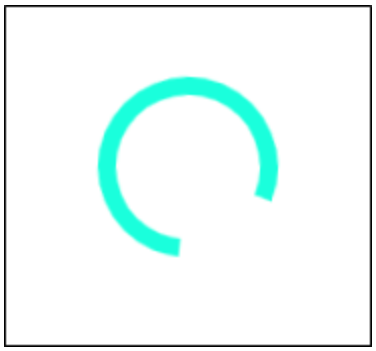


- No Access The message authors and subject matter experts (SMEs) see when they do not have access to the output (e.g., they are not on a team associated with the site), and to request access from an administrator



6. You can click the toggle buttons in the lower-right to see how other elements will be displayed. Be sure to click these buttons a second time to hide them from the preview.
   - Toggle Popup Shows how popups will look for certain events

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



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

Editing Themes

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Edit a Theme

1. On the left side of the interface, click **Sites**.
2. Select the **Themes** tab.
3. Select the theme name.
4. Complete the fields on the left, and use the tabs on the right to preview the look for each element. For more details, see "Creating Themes" on page 76.
5. Click **Save**.

Duplicating Themes

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Duplicate a Theme

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

Deleting Themes

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

Permission Required?

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

For more information about permissions, see the Help system.

How to Delete a Theme

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

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