

MADCAP FLARE ONLINE

Users and Teams Guide

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CONTENTS

CHAPTER 1

- Introduction 5
- Users Page 6
- Teams Page 8

CHAPTER 2

- Main Activities for Users11
- Inviting Users 12
- Setting User Permissions 19
- Setting Your Profile and Notifications32
- Associating Users With Teams and Projects41

CHAPTER 3

- Other Activities for Users46
- Viewing User Profiles47
- Viewing the Activity for a User 48
- Changing Your Own Password 49
- Resetting Another User's Password 50
- Setting Notifications for Users 51
- Deactivating Users 52
- Reactivating Users 53
- Reinviting Users 54

Deleting Users 55

CHAPTER 4

Main Activities for Teams 58
 Creating Teams 59
 Editing Teams 64
 Setting Team Permissions 66
 Setting Notifications for Teams 80
 Deleting Teams 81

APPENDIX

PDFs 83

CHAPTER 1

Introduction

Every Flare Online license is made up of users, and in many cases those users are grouped into teams.

This chapter discusses the following:

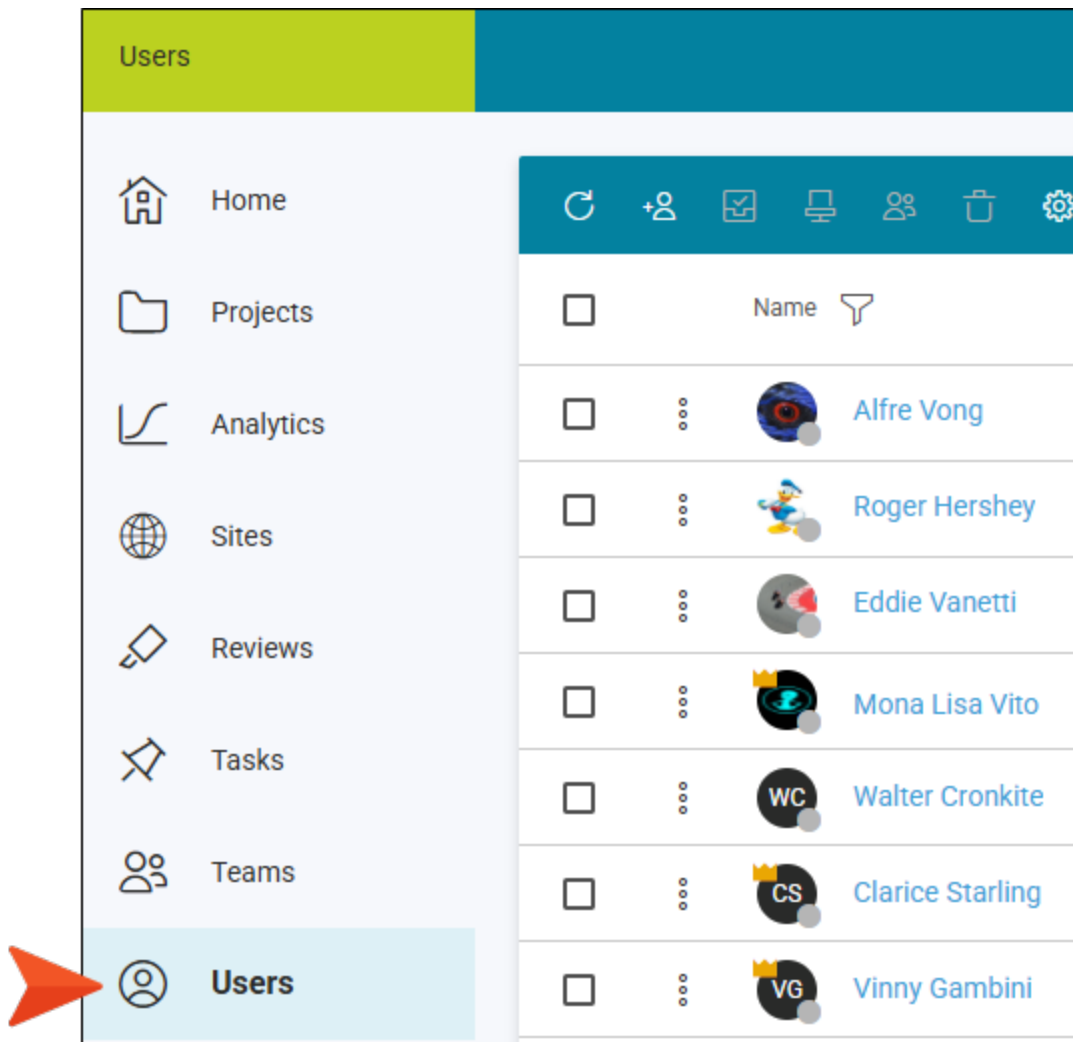
- Users Page 6
- Teams Page 8

Users Page

The Users page lets you see and manage all of the users on a license.

Users can work independently, or they can work collaboratively, sending messages to one another, assigning tasks, etc. If you have many users, you can organize them into teams.

Some users might even be added to more than one license. For example, you might be an independent contractor who does work for a couple of companies, each of which has a MadCap Flare Online license. When you log in to Flare Online, you can switch from one company to the other simply by choosing the appropriate license at the top of the interface.



Main Activities

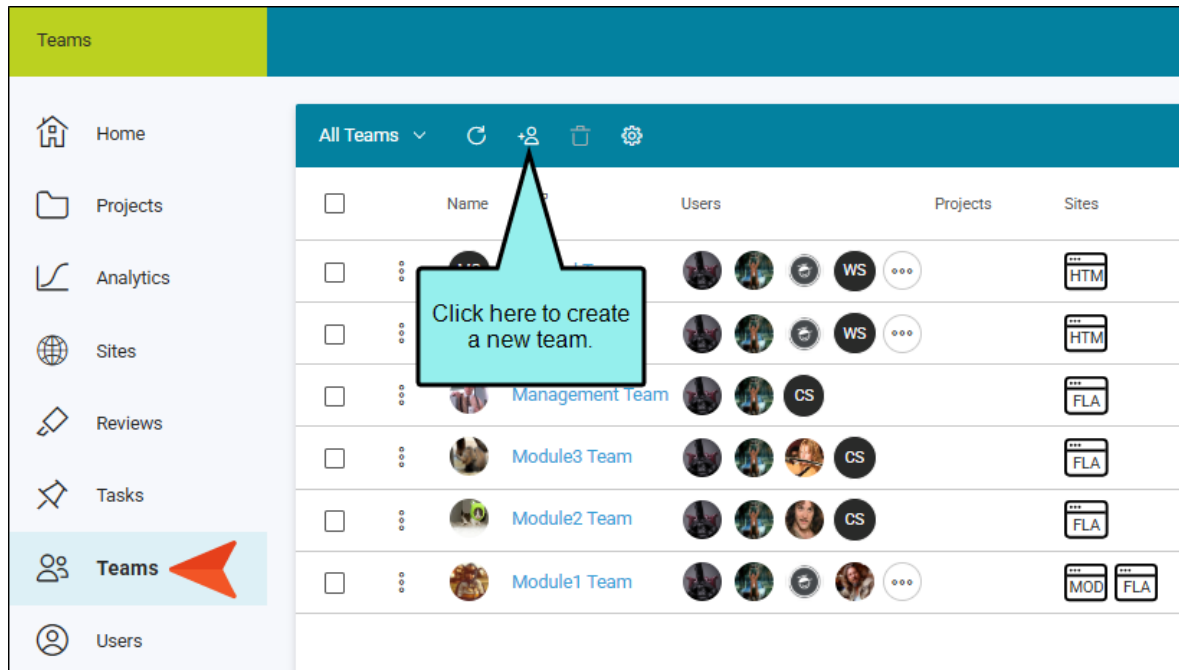
- "Inviting Users" on page 12
- "Setting User Permissions" on page 19
- "Setting Your Profile and Notifications" on page 32
- "Associating Users With Teams and Projects" on page 41

Other Activities

- "Viewing User Profiles" on page 47
- "Viewing the Activity for a User" on page 48
- "Changing Your Own Password" on page 49
- "Resetting Another User's Password" on page 50
- "Setting Notifications for Users" on page 51
- "Deactivating Users" on page 52
- "Reactivating Users" on page 53
- "Reinviting Users" on page 54
- "Deleting Users" on page 55

Teams Page

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 [Close]

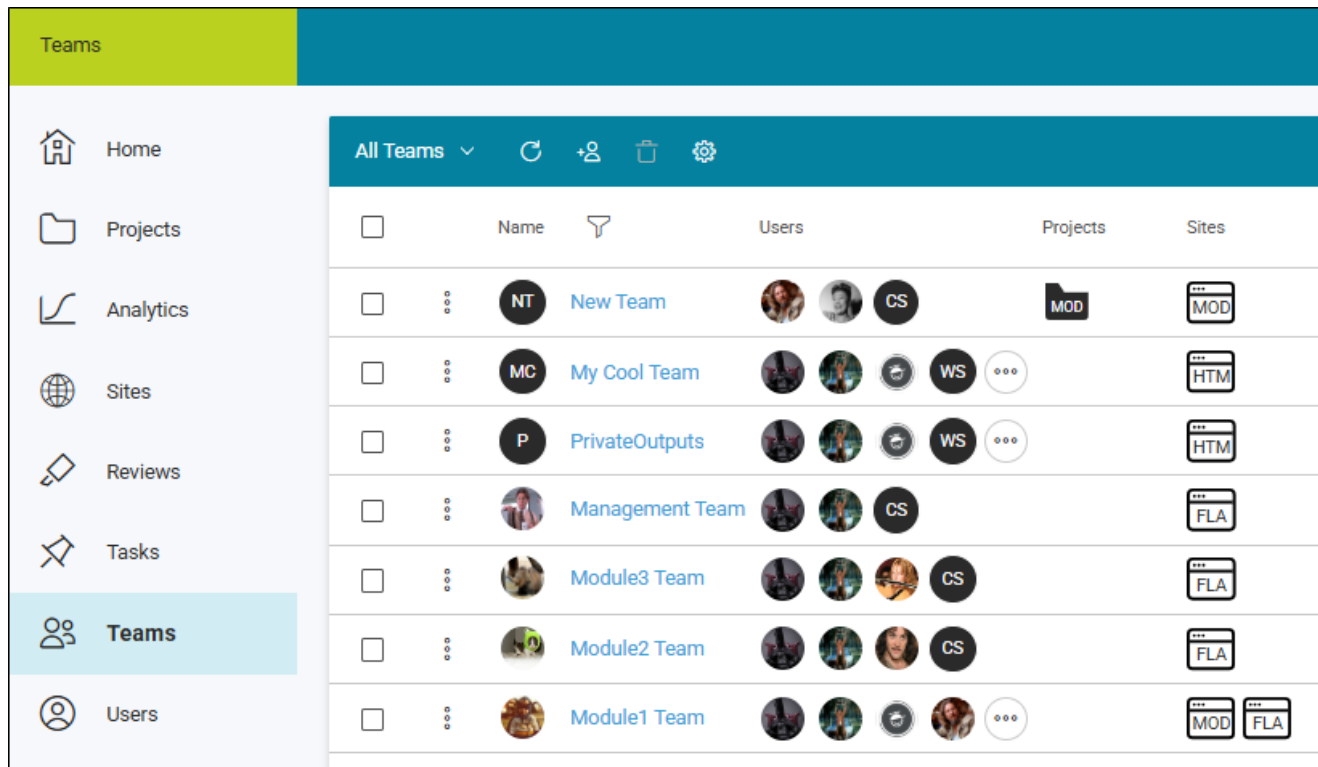
1 Team Settings (New Team) | 2 Permissions (Partial) | 3 Users (3 users) | 4 Projects | 5 Sites | 6 Summary

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.



Main Activities

- "Creating Teams" on page 59
- "Editing Teams" on page 64
- "Setting Notifications for Teams" on page 80
- "Deleting Teams" on page 81

CHAPTER 2

Main Activities for Users

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

This chapter discusses the following:


- Inviting Users 12
- Setting User Permissions 19
- Setting Your Profile and Notifications 32
- Associating Users With Teams and Projects 41

I Inviting Users

Administrators can invite individuals to join the MadCap Flare Online license via email. Users can be invited one at a time, or many can be added in bulk. When inviting authors, you can also set permissions for the tasks they are allowed to perform.

Following are the types of users you can invite:

- **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** 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:

User Administration

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.


How to Invite a Single User

1. If you plan to invite viewers:
 - Make sure you have created at least one team that will be associated with the live private site.
 - Make sure you have created a site, setting it as live and private, and associating the appropriate team(s) with it.
2. On the left side of the interface, click **Users**.
3. In the toolbar click .
4. On the first page of the wizard, make note of how many seats of each user type are available to you. If you require more, you can click the link on the page to purchase more seats.

Alternatively, you can deactivate an existing user to free up a user seat.

For more information, see the Help system.
5. At the bottom select **Add One User**.
6. From the **User Seat Type** field, select the kind of user you want to invite.
7. Complete the **First Name**, **Last Name**, and **Email** fields. Then Click **Next**.
8. If you selected the author seat type, choose the permissions that you want to give the new user. Then click **Next**. For details, see "Setting User Permissions" on page 19.

 **NOTE** You cannot set permissions for SMEs or viewers.

9. You can associate new users with one or more teams. In order to see live private output, users must be part of a team that is also associated with that site. An icon  is shown next to any team that is associated with a live private site. If inviting viewers, you must select at least one team displaying that icon. Then click **Next**.
10. If you selected the viewer seat type, from the **Onboarding Site** drop-down, choose the default live private site. Even though viewers might be associated with multiple live private sites, when they first click the link in their invitation email to set up a username and password, they are automatically logged in to the site you choose in this wizard. After selecting a site from this drop-down, click **Next**.


11. Click **Send Invite**. If the invitation is successful, an email is sent to the user. The user must click the link in the email to activate the account. Until users activate the account, they are listed as "Invited" in the system (on the Users page).
12. On the progress page, you can click **Close** while the invitation is being sent.


How to Invite Multiple Users in Bulk

To use the bulk invitation process, you first need to create or have access to a comma-separated value (CSV) file containing the information for the users you want to add. The CSV file should have three columns, with the following in the top cells of each column:

- Email
- FirstName
- LastName

If you do not yet have such a file, you can download a template from Flare Online, as described in the steps below.

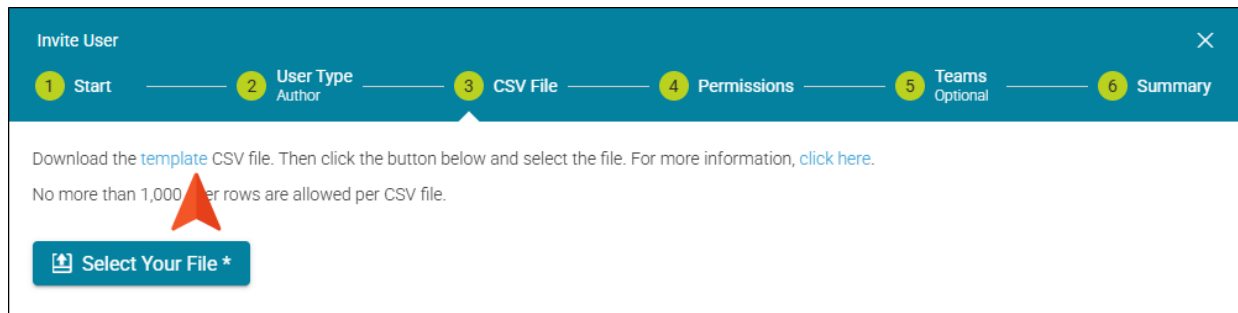
 **NOTE** You can have no more than 1,000 user rows per CSV file. So for example, if you need to send out invitations to 4,813 users, it's best to put those users into five separate CSV files, and go through the invite process in Flare Online five separate times (one for each file).

1. If you plan to invite viewers:
 - Make sure you have created at least one team that will be associated with the live private site.
 - Make sure you have created a site, setting it as live and private, and associating the appropriate team(s) with it.
2. On the left side of the interface, click **Users**.
3. In the toolbar click .
4. On the first page of the wizard, make note of how many seats of each user type are available to you. If you require more, you can click the link on the page to purchase more seats.

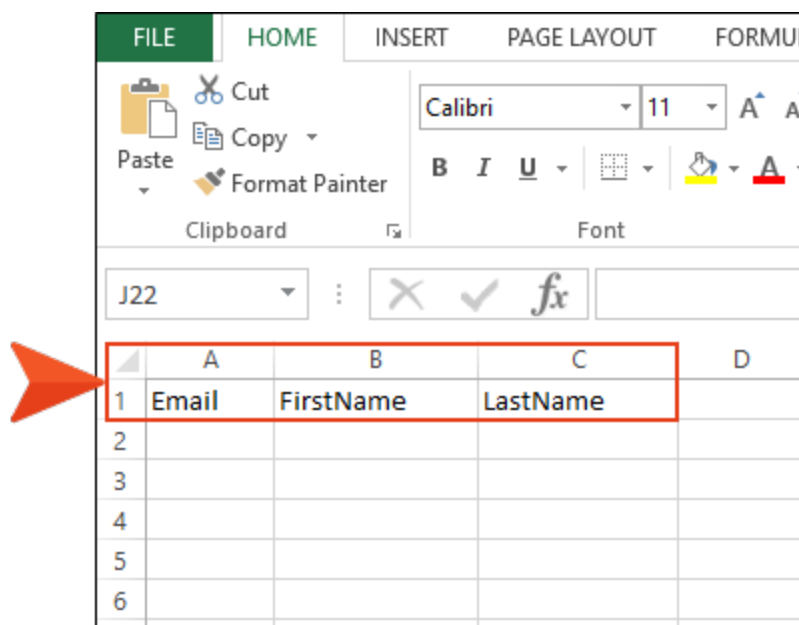
Alternatively, you can deactivate an existing user to free up a user seat.

For more information, see the Help system.
5. At the bottom select **Add Many Users**.
6. From the **User Seat Type** field, select the kind of user you want to invite.
7. Click **Select Your File**, and in the dialog that opens, find and select your CSV file. Then click **Next**.

If you do not yet have a CSV file, you can click the **template** link on the page.



This template speeds the process because the necessary column headings are already provided.





After you complete the cells with each user's email and name, save the CSV file, then select it as described at the beginning of this step.

8. If you selected the author seat type, choose the permissions that you want to give the new users. Then click **Next**. For details, see "Setting User Permissions" on page 19.


 **NOTE** You cannot set permissions for SMEs or viewers.

All of the users in the CSV file will receive the same permissions that you choose. However, you can always edit the permissions for a particular user later.

9. You can associate new users with one or more teams. In order to see live private output, users must be part of a team that is also associated with that site. An icon  is shown next to any team that is associated with a live private site. If inviting viewers, you must select at least one team displaying that icon. Then click **Next**.
10. If you selected the viewer seat type, from the **Onboarding Site** drop-down, choose the default live private site. Even though viewers might be associated with multiple live private sites, when they first click the link in their invitation email to set up a username and password, they are automatically logged in to the site you choose in this wizard. After selecting a site from this drop-down, click **Next**.
11. Click **Send Invites**. If the invitations are successful, an email is sent to each user. The user must click the link in the email to activate the account. Until users activate the account, they are listed as "Invited" in the system (on the Users page).
12. On the progress page, you can click **Close** while the invitations are being sent.

 **TIP** After you send the invitations, the users are created on your Flare Online license. After the users are all created, the emails are then sent out. Keep in mind that this can take awhile, depending on the number of users being created. Also, it is recommended that you wait for one bulk invite process to finish completely before starting another one.


What's Noteworthy?

 **NOTE** Please be aware that there is a time limitation on activation links. A sent user invite link stays active for five days before it expires.

Setting User Permissions

Administrators can set permissions for others. This can be done from the user profile (as described below) or on a team profile. Permissions can be set globally for all projects or separately for individual projects.

If you attempt to perform a task for which you do not have permission, you will be informed of this. You can then contact an administrator (identified by a crown on the user's avatar) to request permission for that activity.

 **NOTE** User permissions can be set for those with the author user type only, not for SMEs or viewers.


Permission Required?

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

User Administration

How to Set User Permissions

1. On the left side of the interface, click **Users**.
2. In the grid, click the avatar or name.
3. On the left side of the dialog, click **Permissions**.
4. From the **Level** field, select either **Global Permissions** or choose the name of a specific project. In order to see projects in the drop-down, the user must be assigned to them (see "Associating Users With Teams and Projects" on page 41).

 **NOTE** Setting Global Permissions affects all projects. If you select a permission globally, you cannot then deselect that permission for a specific project. Instead, you must first deselect the permission globally. After that, you can go to the permissions for each project and choose whether that option should be allowed.


5. Select any of the check boxes to give the appropriate permissions in the system.
 - **Administrative** Adds check marks to all of the following administrator tasks.
 - **Create/Edit Tasks** Create and make changes to tasks. Users without this permission can view tasks only.
 - **Delete Projects** Permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
 - **Delete Teams** Remove teams from MadCap Flare Online.
 - **Delete Users** Delete others from MadCap Flare Online license and remove all data associated with them (except project content).
 - **Manage Output Analytics Keys** Create, edit, or delete Analytics keys.
 - **Manage Sites** Create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
 - **Manage Teams/Projects** Manage teams and projects in the following ways:
 - **Teams** Create teams, rename teams, and assign users and projects to teams.
 - **Projects** Set project-specific permissions, project status, and project name; assign users and teams to projects.
 - **Purchasing** Buy more seats and space.

- **Server Management** Set up URLs (domains), as well as change the license key label and security options (e.g., number of login attempts allowed, password change requirements).
- **Slack Integration** Connect channels from a Slack account to Flare Online. This will feed Flare Online notifications to that Slack channel.
- **User Administration** Makes the user a system-wide administrator. This person can then perform tasks such as inviting new users, resetting passwords, changing the status of users, and setting permissions for users.
- **Projects** Adds check marks to all of the following project-related tasks.
 - **Create/Upload New Projects** Create a new project in Flare Online, or upload projects to Flare Online, thereby adding copies of those projects to Flare Online. A connection exists between the local and Flare Online projects so that you can keep the files in sync.
 - **Import/Pull** Import projects and download content from projects on MadCap Flare Online.
 - **Manage Branches** Create, delete, or merge branches.
 - **Manage Checklists** Create, edit, or delete checklists or checklist templates. If you do not have permission but are associated to the project, you can mark items on the checklist and click to add a note for a particular row.
 - **Manage Reviews** Create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
 - **Manage Translation Package** Create a translation package and send it out for translation.
 - **Push** Upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
 - **Scan** Scan a project manually in the Reports view.
 - **Builds** Adds check marks to all of the following output-related tasks.
 - **Delete Builds** Delete output.
 - **Manage Builds** Mark a particular build as "keep."
 - **Run/Schedule Builds** Manually start or schedule builds for projects.
 - **View/Download Builds** View generated output and download it to the desktop.

- **Workspace** Adds check marks to the following authoring-related tasks.
 - **Create/Edit Files** Add and edit new files to the project. If this is deselected, viewing files in a read-only mode is allowed, and the Workspace page vertical three-dot menu is not available.
 - **Edit Code** Edit XHTML code. If this is deselected, the Code view is read-only.
 - **Edit Files With AI Assist** Interact with AI Assist (and therefore ChatGPT) when modifying topics and snippets.

6. Click **Save**.

Activities and Permissions

Activity	Permission Required
Messages	
Using the Message Center	No Special Permission Required
Projects and Builds	
AI Assist (ChatGPT)	<input checked="" type="checkbox"/> Edit Files With AI Assist
<div style="border: 1px solid orange; padding: 10px;"><p> NOTE Even if this permission is enabled, ChatGPT does not scan anything on your computer. The only information ChatGPT can acquire from you is what you enter manually into the prompt when using AI Assist. If your company has strict policies against AI or ChatGPT, simply do not use it.</p></div>	
Analytics	<input checked="" type="checkbox"/> Manage Output Analytics Keys
Creating and Editing Files	<input checked="" type="checkbox"/> Create/Edit Files
Changing the Status of a Project (Active, Archive, Lock)	<input checked="" type="checkbox"/> Manage Teams/Projects
Editing Code	<input checked="" type="checkbox"/> Edit Code

Activity	Permission Required
Creating Projects Uploading (Binding) Projects	<input checked="" type="checkbox"/> Create/Upload New Projects
Creating Branches	<input checked="" type="checkbox"/> Manage Branches
Creating Project Checklists	Must be Associated with the Project
Deleting Branches	<input checked="" type="checkbox"/> Manage Branches
Deleting Builds	<input checked="" type="checkbox"/> Delete Builds
Deleting Project Checklists	Must be Associated with the Project
Deleting Projects	<input checked="" type="checkbox"/> Delete Projects
Downloading Builds	<input checked="" type="checkbox"/> View/Download Builds
Editing and Annotating Review Files	Must be Part of the Review Process for the File
Editing Project Checklists	<input checked="" type="checkbox"/> Manage Checklists
Editing Project Profiles	<input checked="" type="checkbox"/> Manage Teams/Projects

Activity	Permission Required
Generating and Scheduling Builds	<input checked="" type="checkbox"/> Run/Schedule Builds
Importing Projects	<input checked="" type="checkbox"/> Import/Pull
Managing Review Packages	<input checked="" type="checkbox"/> Manage Reviews
Merging Branches	<input checked="" type="checkbox"/> Manage Branches
Opening a Project	Must be Associated with the Project
Opening the Build Log	Must be Associated with the Project
Pulling Content (Retrieve content from Flare Online to projects in Flare Desktop; applies only to those working in a single-bound source control model)	<input checked="" type="checkbox"/> Import/Pull
Pushing Content (Upload content from projects in Flare Desktop to Flare Online)	<input checked="" type="checkbox"/> Push
Scanning Projects for Reports	<input checked="" type="checkbox"/> Scan

Activity	Permission Required
Setting Builds as Keep	<input checked="" type="checkbox"/> Manage Builds
Submitting Review Files	Must be Part of the Review Process for the File
Viewing Project Files and Commits	Must be Associated with the Project
Viewing Output	<input checked="" type="checkbox"/> View/Download Builds
Viewing Project Activity	Must be Associated with the Project
Viewing Project Profiles	No Special Permission Required
Server	
Changing the License Key Label	<input checked="" type="checkbox"/> Server Management
Creating Viewer Users On Demand	<input checked="" type="checkbox"/> Server Management
Purchasing Seats and Storage Space	<input checked="" type="checkbox"/> Purchasing
Setting a License Avatar	<input checked="" type="checkbox"/> Server Management
Setting the License Vanity	<input checked="" type="checkbox"/> Server Management

Activity	Permission Required
Setting Security Options	<input checked="" type="checkbox"/> Server Management
Setting Up Single Sign-On Authentication on a License	<input checked="" type="checkbox"/> Server Management
Slack Integration	<input checked="" type="checkbox"/> Slack Integration
Sites	
Adding Host Mapped Domains	<input checked="" type="checkbox"/> Server Management
Associating Teams With Sites	<input checked="" type="checkbox"/> Manage Sites
Creating Content Security Policies	<input checked="" type="checkbox"/> Manage Sites
Creating Sites	<input checked="" type="checkbox"/> Manage Sites
Creating Themes	<input checked="" type="checkbox"/> Manage Sites
Deleting Sites	<input checked="" type="checkbox"/> Manage Sites
Editing Sites	<input checked="" type="checkbox"/> Manage Sites

Activity	Permission Required
Excluding Live Sites from Search Engines	<input checked="" type="checkbox"/> Manage Sites
Setting the License Vanity	<input checked="" type="checkbox"/> Manage Sites
Setting Site Vanities	<input checked="" type="checkbox"/> Manage Sites
Setting Sites as Live	<input checked="" type="checkbox"/> Manage Sites
Setting Sites as Private	<input checked="" type="checkbox"/> Manage Sites
Tasks	
Adding Comments to Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Creating Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Deleting Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Editing Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Moving Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Viewing Task Details	No Special Permission Required

Activity	Permission Required
Teams	
Creating Teams	<input checked="" type="checkbox"/> Manage Teams/Projects
Deleting Teams	<input checked="" type="checkbox"/> Delete Teams
Editing Teams	<input checked="" type="checkbox"/> Manage Teams/Projects
Setting Team Permissions	<input checked="" type="checkbox"/> User Administration <input checked="" type="checkbox"/> Manage Teams/Projects
Translation	
Creating a Translation Branch	<input checked="" type="checkbox"/> Manage Translation Package
Users	
Inviting Users	<input checked="" type="checkbox"/> User Administration
Assigning Users to Teams and Projects	<input checked="" type="checkbox"/> Manage Teams/Projects
Changing Your Password	No Special Permission Required

Activity	Permission Required
<p>Deactivating Users</p> <p>(Keep users in system, but remove their ability to log in and work; creates empty seats for other users)</p>	<p><input checked="" type="checkbox"/> User Administration</p>
<p>Deleting Users</p>	<p><input checked="" type="checkbox"/> Delete Users</p>
<p>Setting Your Profile and Notifications</p>	<p>No Special Permission Required</p>
<p>Reactivating Users</p>	<p><input checked="" type="checkbox"/> User Administration</p>
<p>Reinviting Users</p>	<p><input checked="" type="checkbox"/> User Administration</p>
<p>Resetting a User's Password</p>	<p><input checked="" type="checkbox"/> User Administration</p>
<p>Setting User Permissions</p>	<p><input checked="" type="checkbox"/> User Administration</p>
<p>Viewing the Activity for a User</p>	<p>No Special Permission Required</p>
<p>Viewing User Profiles</p>	<p>No Special Permission Required</p>

Activity	Permission Required
Widgets	
Adding Widgets to a Dashboard	No Special Permission Required
Duplicating and Copying Widgets	No Special Permission Required
Filtering Widgets	No Special Permission Required
Removing Widgets	No Special Permission Required

I Setting Your Profile and Notifications

You can edit your own profile (e.g., avatar, contact information, password) and choose which actions will trigger notifications to you.

Permission Required?

No special permission is required to edit your profile and notification settings.

How to Set Your Profile and Notifications

1. At the top of Flare Online, click your avatar or name.
2. Select any of the options on the left, then complete the fields on the right or in the dialog that opens.

SETTINGS


Use the fields on the right to set your avatar and provide general information about yourself. If you do not choose an image for the avatar, Flare Online will use your initials.

If your license is enabled for single sign-on (SSO), you can also choose what happens when you log out of Flare Online.

PASSWORD

Use the fields on the right to change your password.

Your password must have at least 12 characters, including at least one capital, one non-alpha character (e.g., exclamation mark), and one number.

 **NOTE** If you belong to more than one MadCap Flare Online license, your password will be changed for all licenses.

ACCESS

If you select **Access**, you can use the tabs at the top of the dialog to view and modify teams and projects associated with a user. To edit with ease, especially when there is a large set of data (e.g., 100 items or more), the dialog includes infinite scrolling, search to find, filter and sort, and multi-select to add.

ASSIGN NEW TASK

In the dialog, complete the fields to create a new task and assign it to yourself or another user. Then click **Save**.

ACTIVITY

This lets you see the most recent activities involving you.


PERMISSIONS

If you are a User Administrator, you can use the check boxes on the right to give yourself permission for certain activities. For descriptions, see "Setting User Permissions" on page 19.

NOTIFICATIONS

Use the check boxes on the right to select events for which you want to be notified.

SEND NOTIFICATIONS BY

Option	Description
Notification Center	Select this option if you want to see recent notifications (accessed by clicking the bell icon  at the top of the interface). After you open the Notification Center, the alert (red dot) will be removed from the icon.
Email	Select this if you want to receive notifications via email. Notifications will be sent to both your primary and secondary email addresses (if the secondary email is provided).

RECEIVE NOTIFICATIONS WHEN

You can determine when to receive notifications according to various activities. See "Notification Activities" on the next page.

DEACTIVATE

You can click **Deactivate** on the right to remove access for yourself on the license and free up a seat.

DELETE

You can use the area to the right to remove yourself from the license.

3. Click **Save**.

Notification Activities

Builds

Aborted Receive a notification if a build is hanging indefinitely and Flare Online cancels it. If this occurs, please contact technical support to troubleshoot the issue.

Completed Receive a notification if a target from a project is finished building, regardless of whether the build finishes successfully, fails, or contains errors. This notification is sent to members of the project, except for the person who started (and completed) the build.

Started Receive a notification if a target from a project is generated (manual, scheduled start, or rebuild). This notification is off by default. If enabled, it is sent to members of the project, except for the person who started the build.

Stopped Receive a notification if a target from a project is stopped (canceled) during compilation. This notification is off by default. If enabled, it is sent to members of the project, except for the person who stopped the build.

Checklists

Checklist Created Receive a notification if a project checklist is created. This notification is sent to members of the project, except the person who created the checklist.

Checklist Deleted Receive a notification if a project checklist is deleted. This notification is sent to members of the project, except the person who deleted the checklist.

Checklist Updated Receive a notification if a project checklist is edited (i.e., name, type, rows, columns; not status of items). This notification is sent to members of the project, except the person who edited the checklist.

Licenses

Activated User Receive a notification when a newly activated user logs in for the first time. This notification is sent to User Administrators.

Projects

Deleted Receive a notification if a project is deleted. This notification is sent to members of the project, except the person who deleted the project.

Profile Changed Receive a notification if a project profile is changed. This notification is sent to members of the project, except the person who changed the profile.

Status Changed Receive a notification if a project's status (i.e., Activated, Locked, Archived) is changed. This notification is sent to members of the project, except the person who changed the project's status.

Reports

Critical Issues Found Receive a notification whenever a new scan finds critical issues in one or more of the reports. This notification is sent to members of the project who have selected this option.

Reviews

Review Completed Receive a notification if all reviewers have submitted changes to a package that you have sent them.

Review Created Receive a notification if another author has created a new review that is assigned to you.

Review Document Failed Receive a notification if a file that was sent for review cannot be loaded into the interface. If you experience this type of issue, please contact MadCap Software Technical Support for assistance.

Review Package Closed A notification is sent to the owner when a package is closed in Flare Desktop or Flare Online.

Review Package Submitted A notification is sent to the owner when all files within a package are all submitted by one reviewer.

Sites

Set as "Live" Receive a notification if a site is set as "live" (i.e., published for public viewing). This notification is sent to members of the project, except for the person who set the site as "live."

Site Created Receive a notification if a site is created. This notification is sent to members of the project, except the person who created the site.

Site Deleted Receive a notification if a site is deleted. This notification is sent to members of the project, except the person who deleted the site.

Site Updated Receive a notification if a site is edited. This notification is sent to members of the site, except the person who edited the site.

Tasks

Comments or File Actions	Receive a notification if comments or files are added to a task. If a comment is left on a task, the task owner (i.e., the user who created the task) and the user assigned to the task will receive the notification. If someone replies to a comment, the task owner, assignee, original commenter, and all repliers will receive the notification.
Created Board	Receive a notification when a task board has been created.
Deleted	Receive a notification if a task is deleted. The task owner and the user assigned to the task will receive the notification. However, if the task owner makes the change, only the user assigned to the task will receive the notification.
Deleted Board	Receive a notification if a task board is deleted.
Edited	Receive a notification if a task is edited. This includes details of the task, such as its title, description, priority, hours, and more. The task owner and the user assigned to the task will receive the notification. However, if the task owner makes the change, only the user assigned to the task will receive the notification.
Edited Board	Receive a notification if a task board is edited (e.g., name, description).
New/Assigned	Receive a notification when a task has been assigned to you.
Status Changed (Moved)	Receive a notification if the status for a task is changed (i.e., To Do, In Progress, Completed, Archived, Backlogged). The task owner and the user assigned to the task will receive the notification. However, if the task owner makes the change, only the user assigned to the task will receive the notification.

Teams

Added/Removed from a Project	Receive a notification if a team is added to a project or removed from one.
Added/Removed from a Site	Receive a notification if a team is added to a site or removed from one.
Deleted	Receive a notification if a team is deleted. This notification is sent to all team members, except the user who made the change.
Edited	Receive a notification if a team is edited. This notification is sent to all team members except the user who made the change.

Translation

Language Branch Deleted	Receive a notification if a translation branch is deleted from a project.
Language Branch Status Changed	Receive a notification if the status of a translation branch is updated.
Package Created	Receive a notification when a translation package is added to a project.
Package Deleted	Receive a notification when a translation package is removed.
Package Settings Changed	Receive a notification when a change has been made to a translation package.
Package Status Changed	Receive a notification if the status of the translation package is changed.

Users

Added/Removed
from a Project

Receive a notification if you have been added to or removed from a project.

Added/Removed
from a Team

Receive a notification if you have been added to or removed from a team.

Permissions
Changed

Receive a notification if your permissions have changed.



NOTE There are some actions, such as changing server settings, where all Flare Online users on the license automatically get notified.



NOTE If you have a [Slack](#) account, you can integrate it with Flare Online's notification system. By doing this, all types of activity alerts (e.g., builds completed, tasks edited or moved, projects deleted) can be fed directly to your Slack channels, making it easier for you to remain informed and communicate with others when certain events take place in Flare Online. Most of the steps for this integration take place in Flare Online. See the Help system or the *Server Management and Purchasing Guide*.

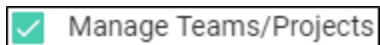
I Associating Users With Teams and Projects

Administrators can associate users with teams and projects in the system.

- Associating users with teams is a convenient way to set the same permissions for a group of people. It also makes it easy to send messages to those who are designated as authors on the license. Also, if you intend to have private output (i.e., output where users must log in), it is necessary to associate those users (authors, SMEs, or viewers) with a team, and then associate that team with the appropriate site.
- Associating users with projects gives those users access to specific projects. Without access to a project, a user—even an administrator—cannot open that project to view it or work in it. You can only associate authors with projects; you cannot associate SMEs or viewers with projects.

Permission Required?

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



For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

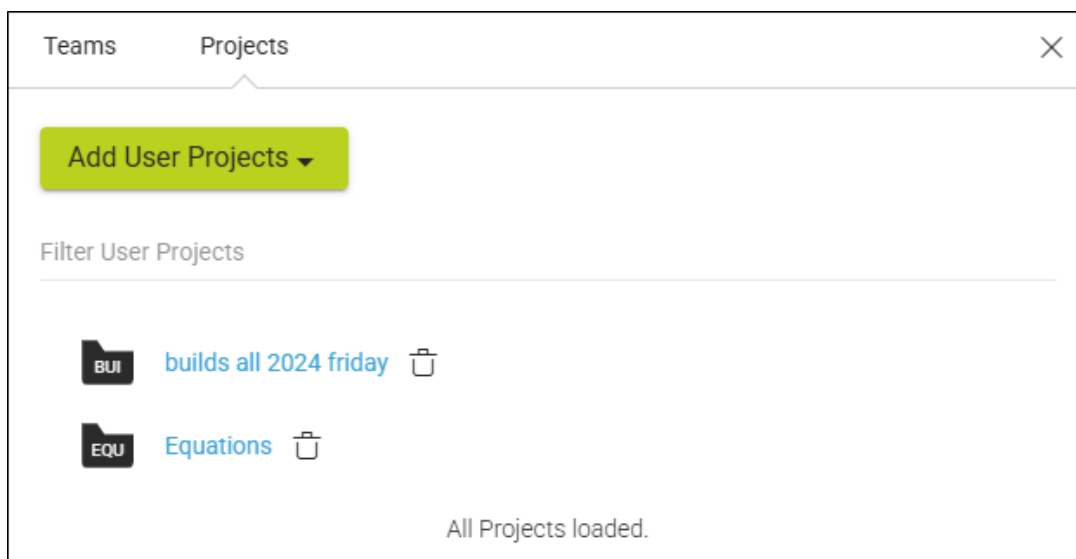
For more information about permissions, see the Help system.

How to Associate Users With Teams and Projects

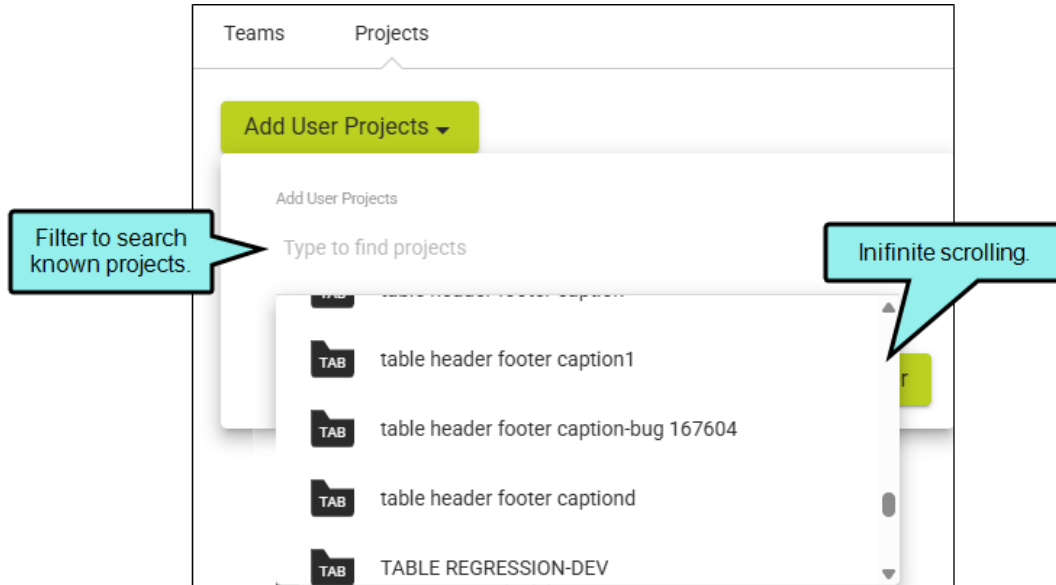
The following steps show how to make associations in the user profile. However, you can also open the project profile or team profile and do the same.

1. Make sure you have already created the team(s), created the project(s), or uploaded the project(s). For more information, see the Help system.
2. On the left side of the interface, click **Users**.
3. Click the user's avatar or name.
4. On the left, click **Access**.
5. From the **Teams** tab at the top, you can add user teams and associate them with a user.
6. From the **Projects** tab at the top, you can add user projects and associate them with a user.

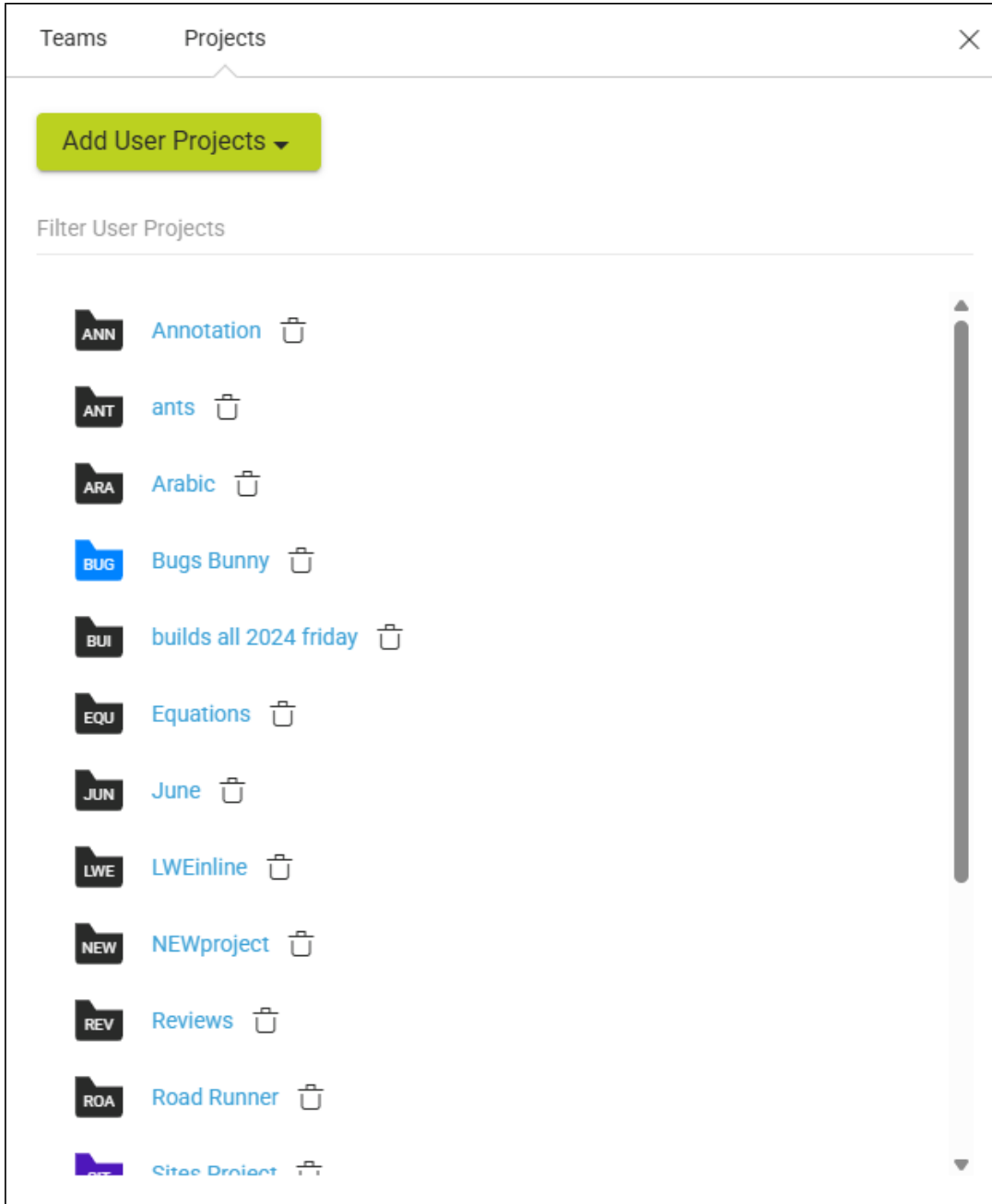
☆ **EXAMPLE** You are part of a license that has hundreds of projects. Currently, you only have access to 2 projects. You decide to add a few more to your profile.



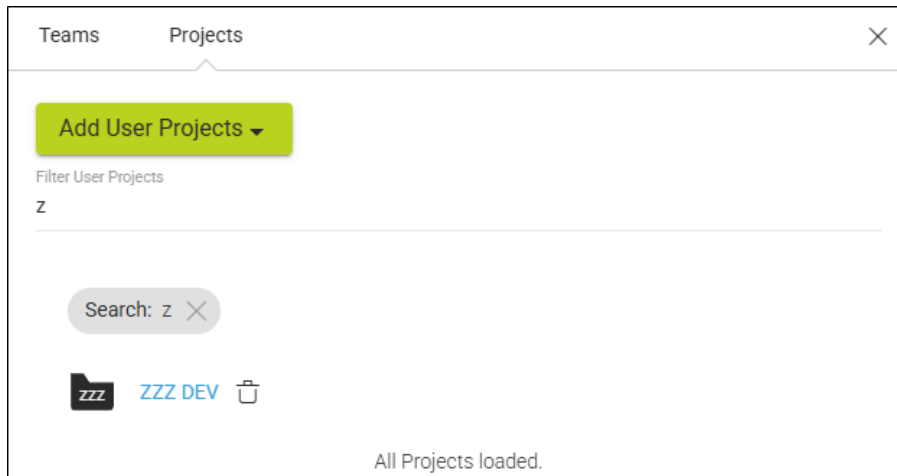
- ☆ Click the **Add User Projects** button. In the drop-down click in the **Add User Projects** field. The next drop-down that displays allows you to infinitely scroll through the items to select a project or multiple projects for yourself. (If you know project names, you can type a few characters in the field for a filtered list.)



☆ When done, click **Add Projects to User**. All the selected projects are added to your profile.



- ☆ Now, you want to quickly find a project you know you have access to that begins with a "z." In the **Filter User Project** field, you type "z" and the project displays.



(The same functionality is available when adding user teams to your profile.)

- 📄 **NOTE** Associations between users, projects, and teams are treated separately. Therefore, if one connection is severed, another one remains.

For example, let's say you open a team and associate it with a user and a project. This means that both the user and project are associated with that team, but the user is not automatically associated with the project. You need to manually associate the user with the project. This is an extra step, but if you then remove the user from the team, that person is still connected with the project.

- 📄 **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.

Other Activities for Users

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

This chapter discusses the following:

Viewing User Profiles	47
Viewing the Activity for a User	48
Changing Your Own Password	49
Resetting Another User's Password	50
Setting Notifications for Users	51
Deactivating Users	52
Reactivating Users	53
Reinviting Users	54
Deleting Users	55

I Viewing User Profiles

You can view the profile for any user. This shows basic information about the user, as well as the teams and projects associated with that person.

Permission Required?

No special permission is required for this activity. All authors are allowed.

How to View a User's Profile

1. On the left side of the interface, click **Users**.
2. In the grid, click the name of the user.
3. You can use the options on the left to view information and take certain actions (e.g., assign a task, set permissions) on the right.

I Viewing the Activity for a User

You can view the most recent activity of any user in the system.

Permission Required?


No special permission is required for this activity. All authors are allowed.

How to View the Activity for a User

1. On the left side of the interface, click **Users**.
2. In the grid, click the name of the user.
3. On the left side of the dialog, click **Activity**.

Changing Your Own Password

You can change your own Flare Online password in your profile.


 **NOTE** If the license is set up to use single sign-on, you will be using your company credentials to log in rather than a Flare Online password.

Permission Required?

No special permission is required for this activity. All authors are allowed.

How to Change Your Password

1. At the top of Flare Online, click your avatar or name.
2. On the left, select **Password**.
3. Complete the **Current Password** field.
4. Complete the **New Password** field. Your password must have at least 12 characters, including at least one capital, one non-alpha character (e.g., exclamation mark), and one number.
5. Complete the **Confirm Password** field.
6. Click **Save**.

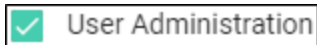
 **NOTE** If you are an administrator and need to change the password for another user, see "Resetting Another User's Password" on the next page.

I Resetting Another User's Password

Administrators can reset another user's password in the system. This resends an email invitation to the user, forcing a password reset. The individual must use the most recently sent email.

Permission Required?

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



For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Reset Another User's Password

1. On the left side of the interface, click **Users**.
2. In the grid, click the name of the user.
3. On the left side of the dialog, click **Reset Password**.
4. Click the **Reset Password** button. An email is sent to the user, who can click a link in the message to reset the password.

Setting Notifications for Users

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.

The screenshot displays the 'Notifications' settings interface. On the left is a teal sidebar with the user's profile and navigation menu. The main content area is titled 'Notifications' and includes a close button (X) in the top right corner. Below the title, there are two sections: 'Send notifications by' and 'Send notifications when'. The 'Send notifications by' section has two options: 'Notification Center' (checked) and 'Email' (unchecked). The 'Send notifications when' section is divided into two columns of activities, each with a chevron icon to its left and a checkbox. The activities and their notification settings are as follows:

Activity	Notification Status
Builds	Unchecked
Checklists	Unchecked
Licenses	Checked
Activated User	Unchecked
Projects	Unchecked
Reports	Unchecked
Reviews	Unchecked
Sites	Unchecked
Tasks	Unchecked
Teams	Unchecked
Translation	Unchecked
Users	Checked
Added/Removed from a Project	Checked
Added/Removed from a Team	Checked
Permissions Changed	Checked

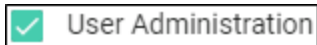
At the bottom right of the settings panel, there are two buttons: 'Cancel' and 'Save'.

I Deactivating Users

Administrators can deactivate users in the system. If you deactivate a user on the license, no data associated with the user will be deleted. Also, a seat will become free for another user.

Permission Required?

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






For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Deactivate a User

1. On the left side of the interface, click **Users**.
2. Find the user in the grid, and in the **Status** column click **Active**.

 **NOTE** If the Status column is not shown, click  in the toolbar, select **Status**, and click **Save**.

 **NOTE** If the Status column displays "Paused," it means you are using a trial version of Flare Online, and that the number of purchased seats is less than the number of current users.

3. In the dialog, the **Status** field should already show **Deactivate**.
4. Click **Save**.

Reactivating Users

Administrators can reactivate users who were previously deactivated in the system.

Permission Required?

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



User Administration


For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Reactivate a User

1. On the left side of the interface, click **Users**.
2. Find the user in the grid, and in the **Status** column click **Deactivated**.

 **NOTE** If the Status column is not shown, click  in the toolbar, select **Status**, and click **Save**.

 **NOTE** If the Status column displays "Paused," it means you are using a trial version of Flare Online, and that the number of purchased seats is less than the number of current users.

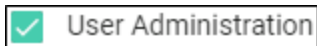
3. In the dialog, the **Status** field should already show **Activate**.
4. Click **Save**.

I Reinviting Users

Administrators can reinvite users who were previously invited to join the license. Doing this will deactivate the previous email invitation. You might need to reinvite users if they were not able to find the original email invitation. Users must use the latest email invitation in order to activate the account.

Permission Required?

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






For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Reinvite a User

1. On the left side of the interface, click **Users**.
2. Find the user in the grid, and in the **Status** column click **Invited**.


 **NOTE** If the Status column is not shown, click  in the toolbar, select **Status**, and click **Save**.

 **NOTE** If the Status column displays "Paused," it means you are using a trial version of Flare Online, and that the number of purchased seats is less than the number of current users.

3. In the dialog, the **Status** field should already show **Reinvite**.
4. Click **Save**. Another email is sent to the individual. The user must click the link in the email to activate the account. Until users activate the account, they are listed as "Invited" in the system.

Deleting Users

Administrators can delete users from the Flare Online license. This frees up a seat for a new user.

 **WARNING** Deleting a user from a license removes that person from teams, tasks, and projects. If users are reinvited to the license, they would have to be re-added to any teams, tasks, or projects that they previously belonged to.

If users belong to other Flare Online licenses, their profile and avatar are maintained and they will still have access to those licenses. If users do not belong to any other licenses, their profile and avatar are deleted.

It is not possible to recover the profile and avatar of users once they have been deleted. Instead, you would need to reinvite that person to Flare Online and create the profile again.

Permission Required?


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

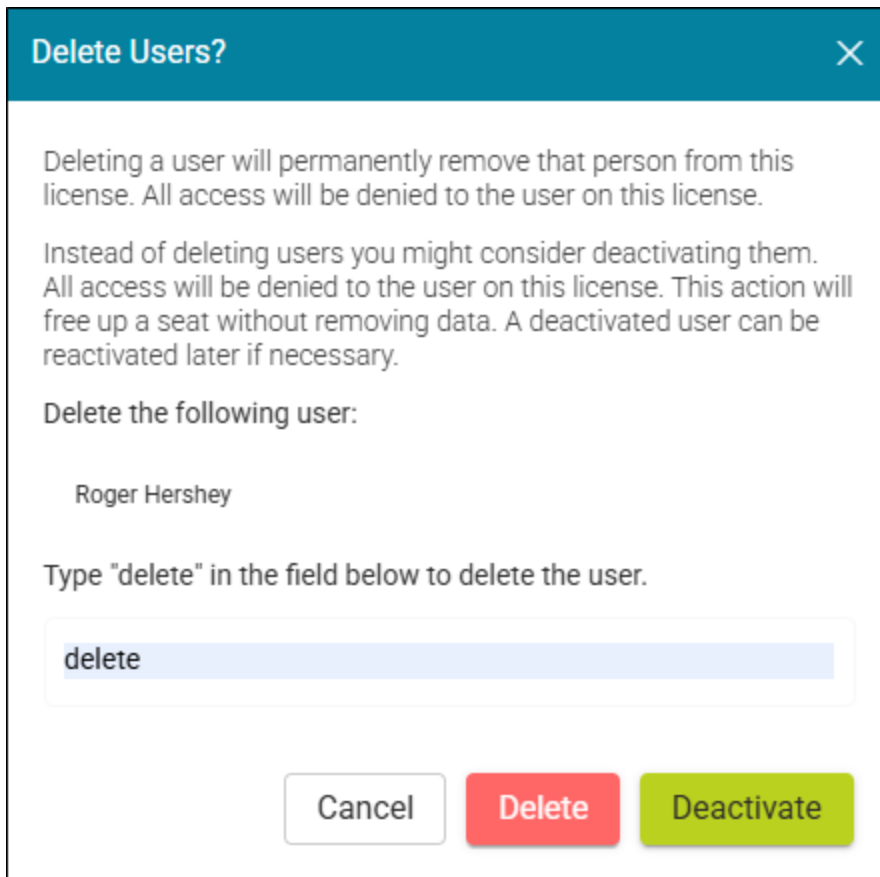
 **Delete Users**

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Delete a User

1. On the left side of the interface, click **Users**.
2. In the grid, click the check box to the left of each user you want to delete.
3. In the toolbar click .
4. In the dialog, type delete in the field under the listed users.



5. Click **Delete**.



NOTE You should delete a user only if you are sure you want to completely remove that person from the system. An alternative to deleting a user is deactivation. If you deactivate a user on the license, no data associated with the user will be deleted. Also, a seat will become free for another user. A deactivated user can be reactivated later if necessary. See "Deactivating Users" on page 52.

CHAPTER 4

Main Activities for Teams

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

This chapter discusses the following:

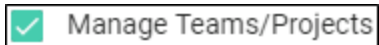
- Creating Teams 59
- Editing Teams 64
- Setting Team Permissions 66
- Setting Notifications for Teams 80
- Deleting Teams 81

Creating Teams

Users with permission can create teams and then associate projects, users, and/or sites with those teams.

Permission Required?


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



For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Create a Team

1. On the left side of the interface, click **Teams**.
2. In the toolbar click .
3. Complete the fields on each page of the wizard, clicking **Next** after each.

Team Settings

- a. (Optional) Click **Change** to find and select an image for the team avatar.
- b. Complete the **Name** field.
- c. (Optional) Complete the **Description** field.

Permissions

(Optional) Select any of the check boxes to give the appropriate permissions in the system.

- **Administrative** Adds check marks to all of the following administrator tasks.
 - **Create/Edit Tasks** Create and make changes to tasks. Users without this permission can view tasks only.
 - **Delete Projects** Permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
 - **Delete Teams** Remove teams from MadCap Flare Online.
 - **Delete Users** Delete others from MadCap Flare Online license and remove all data associated with them (except project content).
 - **Manage Output Analytics Keys** Create, edit, or delete Analytics keys.
 - **Manage Sites** Create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
 - **Manage Teams/Projects** Manage teams and projects in the following ways:
 - **Teams** Create teams, rename teams, and assign users and projects to teams.
 - **Projects** Set project-specific permissions, project status, and project name; assign users and teams to projects.
 - **Purchasing** Buy more seats and space.
 - **Server Management** Set up URLs (domains), as well as change the license key label and security options (e.g., number of login attempts allowed, password change requirements).
 - **Slack Integration** Connect channels from a Slack account to Flare Online. This will feed Flare Online notifications to that Slack channel.
 - **User Administration** Makes the user a system-wide administrator. This person can then perform tasks such as inviting new users, resetting passwords, changing the status of users, and setting permissions for users.
- **Projects** Adds check marks to all of the following project-related tasks.
 - **Create/Upload New Projects** Create a new project in Flare Online, or upload projects to Flare Online, thereby adding copies of those projects to Flare Online. A connection exists between the local and Flare Online projects so that you can keep the files in sync.
 - **Import/Pull** Import projects and download content from projects on MadCap Flare Online.

- **Manage Branches** Create, delete, or merge branches.
- **Manage Checklists** Create, edit, or delete checklists or checklist templates. If you do not have permission but are associated to the project, you can mark items on the checklist and click to add a note for a particular row.
- **Manage Reviews** Create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
- **Manage Translation Package** Create a translation package and send it out for translation.
- **Push** Upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
- **Scan** Scan a project manually in the Reports view.
- **Builds** Adds check marks to all of the following output-related tasks.
 - **Delete Builds** Delete output.
 - **Manage Builds** Mark a particular build as "keep."
 - **Run/Schedule Builds** Manually start or schedule builds for projects.
 - **View/Download Builds** View generated output and download it to the desktop.
- **Workspace** Adds check marks to the following authoring-related tasks.
 - **Create/Edit Files** Add and edit new files to the project. If this is deselected, viewing files in a read-only mode is allowed, and the Workspace page vertical three-dot menu is not available.
 - **Edit Code** Edit XHTML code. If this is deselected, the Code view is read-only.
 - **Edit Files With AI Assist** Interact with AI Assist (and therefore ChatGPT) when modifying topics and snippets.

Team permissions do not create a conflict with user permissions. If a user is assigned a permission that is set either for the user or the team, that person simply has the permission on that license. In other words, there are simply two places where a user can be given permissions.

☆ **EXAMPLE** In the user profile, a person *has been given* the Create/Edit Tasks permission. In the team, the person *has not been given* that permission.

Result: the user has the Create/Edit Tasks permission.

In the user profile, a person *has not been given* the Push permission. In the team, the person *has been given* that permission.

Result: The user has the Push permission.

Users

(Optional) Select the individuals for the team.

Projects

(Optional) Select any projects to be associated with the team.

Sites


(Optional) Select any sites to be associated with the team

4. After reviewing the Summary page, click **Create Team**.

📄 **NOTE** Associations between users, projects, and teams are treated separately. Therefore, if one connection is severed, another one remains.

For example, let's say you open a team and associate it with a user and a project. This means that both the user and project are associated with that team, but the user is not automatically associated with the project. You need to manually associate the user with the project. This is an extra step, but if you then remove the user from the team, that person is still connected with the project.

📄 **NOTE** If you are an administrator, you can open a profile for an existing team and associate permissions with it. Users associated with the team would then have all of those permissions that are selected. See "Setting Team Permissions" on page 66.

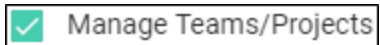
 **NOTE** If your license is enabled for single sign-on (SSO) and you have private output, you can automate the process for inviting users (as viewers), as well as associating users and sites with a team. In the license settings, you can use an option to create viewer users on demand, and choose one or 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.

I Editing Teams

Users with permission can edit team profiles. This includes the ability to: change the team name or description; associate projects, users, and/or sites; and set team permissions.

Permission Required?

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




For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.


For more information about permissions, see the Help system.

How to Edit a Team

1. On the left side of the interface, click **Teams**.
2. In the grid, click the avatar or name of the team.
3. On the left side of the dialog, select any of the options, then complete the fields displayed on the right.

If you select **Access**, you can use any of the tabs at the top of the dialog to view and modify individuals, projects, and sites associated with the team. To edit with ease, especially when there is a large set of data (e.g., 100 items or more), the dialog includes infinite scrolling, search to find, filter and sort, and multi-select to add.

 **NOTE** You can bulk assign users for a team from the Users grid page. Select all users, and then in the local toolbar click **Add selected users to a team**.

 **NOTE** Associations between users, projects, and teams are treated separately. Therefore, if one connection is severed, another one remains.

For example, let's say you open a team and associate it with a user and a project. This means that both the user and project are associated with that team, but the user is not automatically associated with the project. You need to manually associate the user with the project. This is an extra step, but if you then remove the user from the team, that person is still connected with the project.


If you select **Permissions**, you can set permissions for the entire team. Users associated with the team would then have all of those permissions that you choose. See "Setting Team Permissions" on the next page.

4. Click **Save**.

Setting Team Permissions

Administrators can set permissions for others. This can be done from the user profile or on a team profile (as described below). Permissions can be set globally for all projects or separately for individual projects.

If you attempt to perform a task for which you do not have permission, you will be informed of this. You can then contact an administrator (identified by a crown on the user's avatar) to request permission for that activity.

 **NOTE** User permissions can be set for those with the author user type only, not for SMEs or viewers.

Permission Required?

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

User Administration

Manage Teams/Projects

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" above.

For more information about permissions, see the Help system.

Team vs. User Permissions

Team permissions do not create a conflict with user permissions. If a user is assigned a permission that is set either for the user or the team, that person simply has the permission on that license. In other words, there are simply two places where a user can be given permissions.

☆ **EXAMPLE** In the user profile, a person *has been given* the Create/Edit Tasks permission. In the team, the person *has not been given* that permission.


Result: the user has the Create/Edit Tasks permission.

In the user profile, a person *has not been given* the Push permission. In the team, the person *has been given* that permission.

Result: The user has the Push permission.

How to Set Team Permissions

1. On the left side of the interface, click **Teams**.
2. In the grid, click the avatar or name.
3. On the left side of the dialog, click **Permissions**.
4. From the **Level** field, select either **Global Permissions** or choose the name of a specific project. In order to see projects in the drop-down, the user must be assigned to them (see "Associating Users With Teams and Projects" on page 41).

 **NOTE** Setting Global Permissions affects all projects. If you select a permission globally, you cannot then deselect that permission for a specific project. Instead, you must first deselect the permission globally. After that, you can go to the permissions for each project and choose whether that option should be allowed.


5. Select any of the check boxes to give the appropriate permissions in the system.
 - **Administrative** Adds check marks to all of the following administrator tasks.
 - **Create/Edit Tasks** Create and make changes to tasks. Users without this permission can view tasks only.
 - **Delete Projects** Permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
 - **Delete Teams** Remove teams from MadCap Flare Online.
 - **Delete Users** Delete others from MadCap Flare Online license and remove all data associated with them (except project content).
 - **Manage Output Analytics Keys** Create, edit, or delete Analytics keys.
 - **Manage Sites** Create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
 - **Manage Teams/Projects** Manage teams and projects in the following ways:
 - **Teams** Create teams, rename teams, and assign users and projects to teams.
 - **Projects** Set project-specific permissions, project status, and project name; assign users and teams to projects.
 - **Purchasing** Buy more seats and space.

- **Server Management** Set up URLs (domains), as well as change the license key label and security options (e.g., number of login attempts allowed, password change requirements).
- **Slack Integration** Connect channels from a Slack account to Flare Online. This will feed Flare Online notifications to that Slack channel.
- **User Administration** Makes the user a system-wide administrator. This person can then perform tasks such as inviting new users, resetting passwords, changing the status of users, and setting permissions for users.
- **Projects** Adds check marks to all of the following project-related tasks.
 - **Create/Upload New Projects** Create a new project in Flare Online, or upload projects to Flare Online, thereby adding copies of those projects to Flare Online. A connection exists between the local and Flare Online projects so that you can keep the files in sync.
 - **Import/Pull** Import projects and download content from projects on MadCap Flare Online.
 - **Manage Branches** Create, delete, or merge branches.
 - **Manage Checklists** Create, edit, or delete checklists or checklist templates. If you do not have permission but are associated to the project, you can mark items on the checklist and click to add a note for a particular row.
 - **Manage Reviews** Create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
 - **Manage Translation Package** Create a translation package and send it out for translation.
 - **Push** Upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
 - **Scan** Scan a project manually in the Reports view.
 - **Builds** Adds check marks to all of the following output-related tasks.
 - **Delete Builds** Delete output.
 - **Manage Builds** Mark a particular build as "keep."
 - **Run/Schedule Builds** Manually start or schedule builds for projects.
 - **View/Download Builds** View generated output and download it to the desktop.

- **Workspace** Adds check marks to the following authoring-related tasks.
 - **Create/Edit Files** Add and edit new files to the project. If this is deselected, viewing files in a read-only mode is allowed, and the Workspace page vertical three-dot menu is not available.
 - **Edit Code** Edit XHTML code. If this is deselected, the Code view is read-only.
 - **Edit Files With AI Assist** Interact with AI Assist (and therefore ChatGPT) when modifying topics and snippets.

6. Click **Save**.

Activities and Permissions

Activity	Permission Required
Messages	
Using the Message Center	No Special Permission Required
Projects and Builds	
AI Assist (ChatGPT)	<input checked="" type="checkbox"/> Edit Files With AI Assist
<div style="border: 1px solid orange; padding: 10px;"><p> NOTE Even if this permission is enabled, ChatGPT does not scan anything on your computer. The only information ChatGPT can acquire from you is what you enter manually into the prompt when using AI Assist. If your company has strict policies against AI or ChatGPT, simply do not use it.</p></div>	
Analytics	<input checked="" type="checkbox"/> Manage Output Analytics Keys
Creating and Editing Files	<input checked="" type="checkbox"/> Create/Edit Files
Changing the Status of a Project (Active, Archive, Lock)	<input checked="" type="checkbox"/> Manage Teams/Projects
Editing Code	<input checked="" type="checkbox"/> Edit Code

Activity	Permission Required
Creating Projects Uploading (Binding) Projects	<input checked="" type="checkbox"/> Create/Upload New Projects
Creating Branches	<input checked="" type="checkbox"/> Manage Branches
Creating Project Checklists	Must be Associated with the Project
Deleting Branches	<input checked="" type="checkbox"/> Manage Branches
Deleting Builds	<input checked="" type="checkbox"/> Delete Builds
Deleting Project Checklists	Must be Associated with the Project
Deleting Projects	<input checked="" type="checkbox"/> Delete Projects
Downloading Builds	<input checked="" type="checkbox"/> View/Download Builds
Editing and Annotating Review Files	Must be Part of the Review Process for the File
Editing Project Checklists	<input checked="" type="checkbox"/> Manage Checklists
Editing Project Profiles	<input checked="" type="checkbox"/> Manage Teams/Projects

Activity	Permission Required
Generating and Scheduling Builds	<input checked="" type="checkbox"/> Run/Schedule Builds
Importing Projects	<input checked="" type="checkbox"/> Import/Pull
Managing Review Packages	<input checked="" type="checkbox"/> Manage Reviews
Merging Branches	<input checked="" type="checkbox"/> Manage Branches
Opening a Project	Must be Associated with the Project
Opening the Build Log	Must be Associated with the Project
<p data-bbox="203 997 414 1039">Pulling Content</p> <p data-bbox="203 1071 544 1302">(Retrieve content from Flare Online to projects in Flare Desktop; applies only to those working in a single-bound source control model)</p>	<input checked="" type="checkbox"/> Import/Pull
<p data-bbox="203 1365 430 1407">Pushing Content</p> <p data-bbox="203 1438 535 1554">(Upload content from projects in Flare Desktop to Flare Online)</p>	<input checked="" type="checkbox"/> Push
Scanning Projects for Reports	<input checked="" type="checkbox"/> Scan

Activity	Permission Required
Setting Builds as Keep	<input checked="" type="checkbox"/> Manage Builds
Submitting Review Files	Must be Part of the Review Process for the File
Viewing Project Files and Commits	Must be Associated with the Project
Viewing Output	<input checked="" type="checkbox"/> View/Download Builds
Viewing Project Activity	Must be Associated with the Project
Viewing Project Profiles	No Special Permission Required
Server	
Changing the License Key Label	<input checked="" type="checkbox"/> Server Management
Creating Viewer Users On Demand	<input checked="" type="checkbox"/> Server Management
Purchasing Seats and Storage Space	<input checked="" type="checkbox"/> Purchasing
Setting a License Avatar	<input checked="" type="checkbox"/> Server Management
Setting the License Vanity	<input checked="" type="checkbox"/> Server Management

Activity	Permission Required
Setting Security Options	<input checked="" type="checkbox"/> Server Management
Setting Up Single Sign-On Authentication on a License	<input checked="" type="checkbox"/> Server Management
Slack Integration	<input checked="" type="checkbox"/> Slack Integration
Sites	
Adding Host Mapped Domains	<input checked="" type="checkbox"/> Server Management
Associating Teams With Sites	<input checked="" type="checkbox"/> Manage Sites
Creating Content Security Policies	<input checked="" type="checkbox"/> Manage Sites
Creating Sites	<input checked="" type="checkbox"/> Manage Sites
Creating Themes	<input checked="" type="checkbox"/> Manage Sites
Deleting Sites	<input checked="" type="checkbox"/> Manage Sites
Editing Sites	<input checked="" type="checkbox"/> Manage Sites

Activity	Permission Required
Excluding Live Sites from Search Engines	<input checked="" type="checkbox"/> Manage Sites
Setting the License Vanity	<input checked="" type="checkbox"/> Manage Sites
Setting Site Vanities	<input checked="" type="checkbox"/> Manage Sites
Setting Sites as Live	<input checked="" type="checkbox"/> Manage Sites
Setting Sites as Private	<input checked="" type="checkbox"/> Manage Sites
Tasks	
Adding Comments to Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Creating Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Deleting Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Editing Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Moving Tasks	<input checked="" type="checkbox"/> Create/Edit Tasks
Viewing Task Details	No Special Permission Required

Activity	Permission Required
Teams	
Creating Teams	<input checked="" type="checkbox"/> Manage Teams/Projects
Deleting Teams	<input checked="" type="checkbox"/> Delete Teams
Editing Teams	<input checked="" type="checkbox"/> Manage Teams/Projects
Setting Team Permissions	<input checked="" type="checkbox"/> User Administration <input checked="" type="checkbox"/> Manage Teams/Projects
Translation	
Creating a Translation Branch	<input checked="" type="checkbox"/> Manage Translation Package
Users	
Inviting Users	<input checked="" type="checkbox"/> User Administration
Assigning Users to Teams and Projects	<input checked="" type="checkbox"/> Manage Teams/Projects
Changing Your Password	No Special Permission Required

Activity	Permission Required
<p>Deactivating Users</p> <p>(Keep users in system, but remove their ability to log in and work; creates empty seats for other users)</p>	<input checked="" type="checkbox"/> User Administration
<p>Deleting Users</p>	<input checked="" type="checkbox"/> Delete Users
<p>Setting Your Profile and Notifications</p>	<p>No Special Permission Required</p>
<p>Reactivating Users</p>	<input checked="" type="checkbox"/> User Administration
<p>Reinviting Users</p>	<input checked="" type="checkbox"/> User Administration
<p>Resetting a User's Password</p>	<input checked="" type="checkbox"/> User Administration
<p>Setting User Permissions</p>	<input checked="" type="checkbox"/> User Administration
<p>Viewing the Activity for a User</p>	<p>No Special Permission Required</p>
<p>Viewing User Profiles</p>	<p>No Special Permission Required</p>

Activity	Permission Required
Widgets	
Adding Widgets to a Dashboard	No Special Permission Required
Duplicating and Copying Widgets	No Special Permission Required
Filtering Widgets	No Special Permission Required
Removing Widgets	No Special Permission Required

Setting Notifications for Teams

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.

Notifications [Close]

Send notifications by
 Notification Center Email

Send notifications when

<input type="checkbox"/> Builds	<input type="checkbox"/> Sites
<input type="checkbox"/> Checklists	<input type="checkbox"/> Tasks
<input checked="" type="checkbox"/> Licenses	<input checked="" type="checkbox"/> Teams
<input type="checkbox"/> Activated User	<input checked="" type="checkbox"/> Added/Removed from a Project
<input type="checkbox"/> Projects	<input checked="" type="checkbox"/> Added/Removed from a Site
<input type="checkbox"/> Reports	<input checked="" type="checkbox"/> Deleted
<input type="checkbox"/> Reviews	<input checked="" type="checkbox"/> Edited
	<input type="checkbox"/> Translation
	<input type="checkbox"/> Users

Cancel Save

I Deleting Teams

Users with permission can delete teams from the Flare Online license.

Permission Required?


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

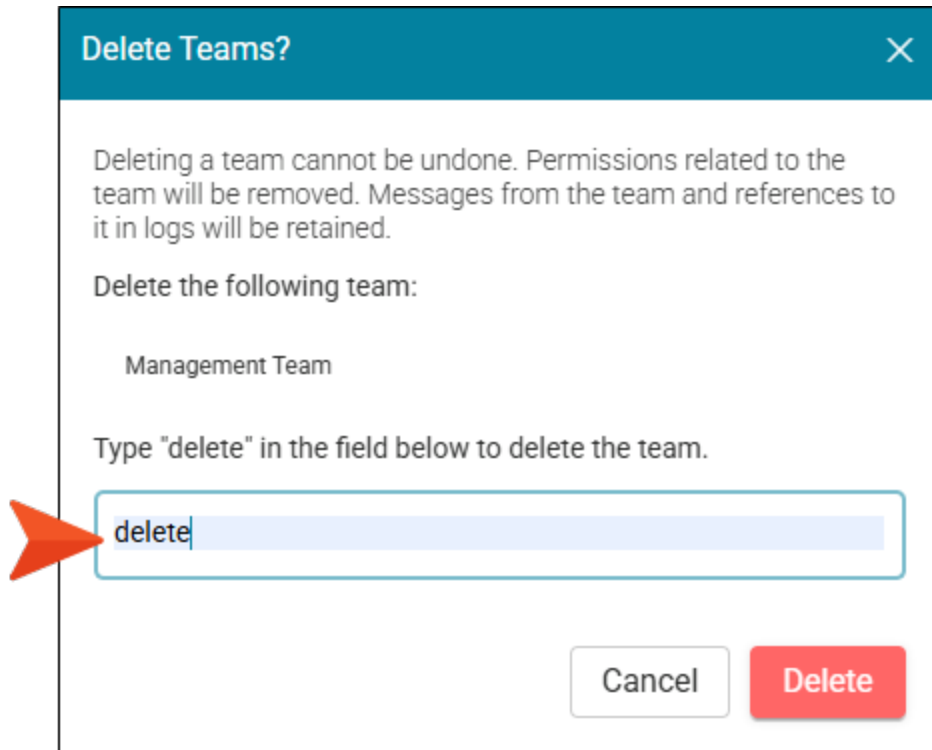


For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 66.

For more information about permissions, see the Help system.

How to Delete a Team

1. On the left side of the interface, click **Teams**.
2. In the grid, click the check box next to each team you want to delete. Or click the top check box to select all teams.
3. In the toolbar click .
4. In the dialog, type `delete` in the field under the listed teams.



5. Click **Delete**.

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

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide