USER GUIDE

MADCAP FLARE ONLINE

Users and Teams Guide

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

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CHAPTER 1

Introduction

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

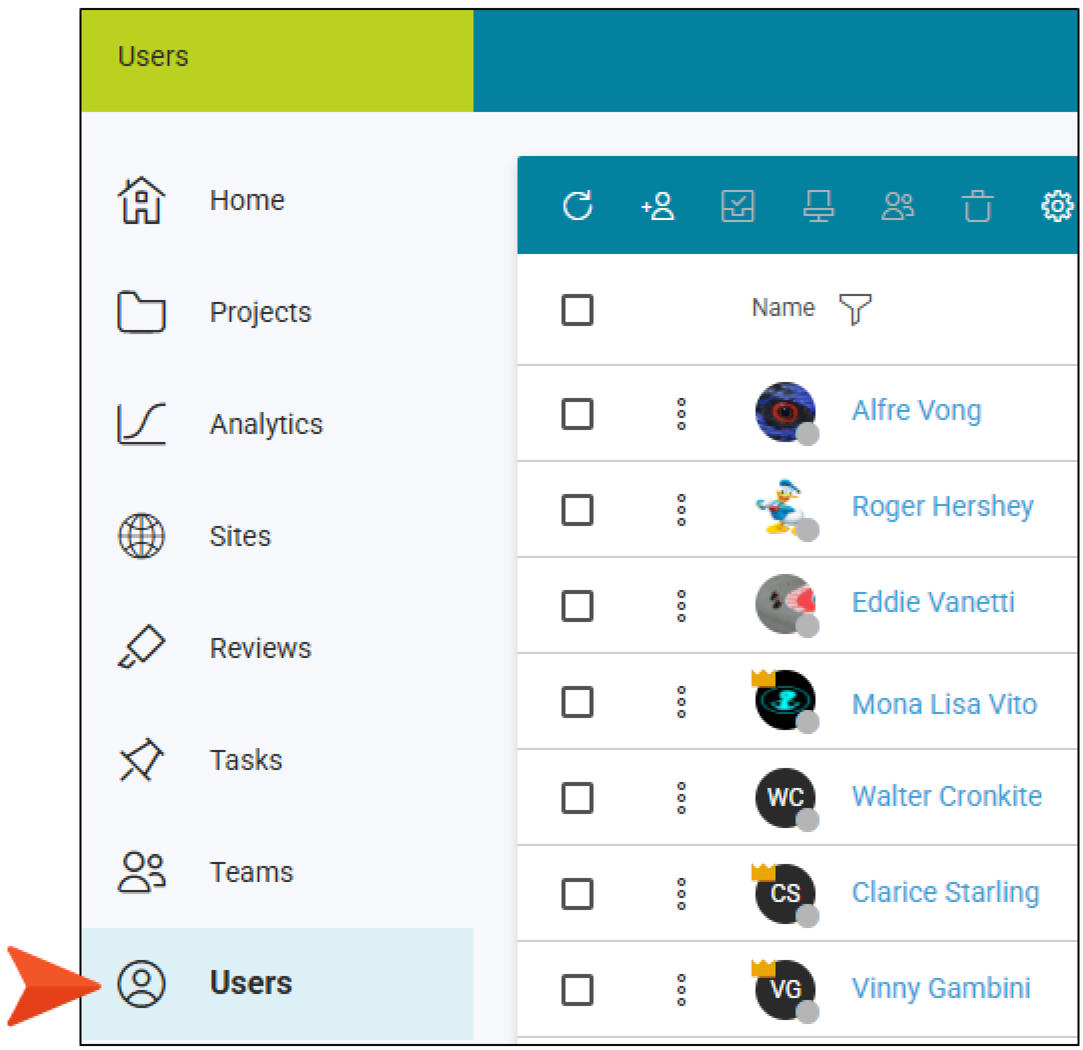
This chapter discusses the following:

Users Page

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.



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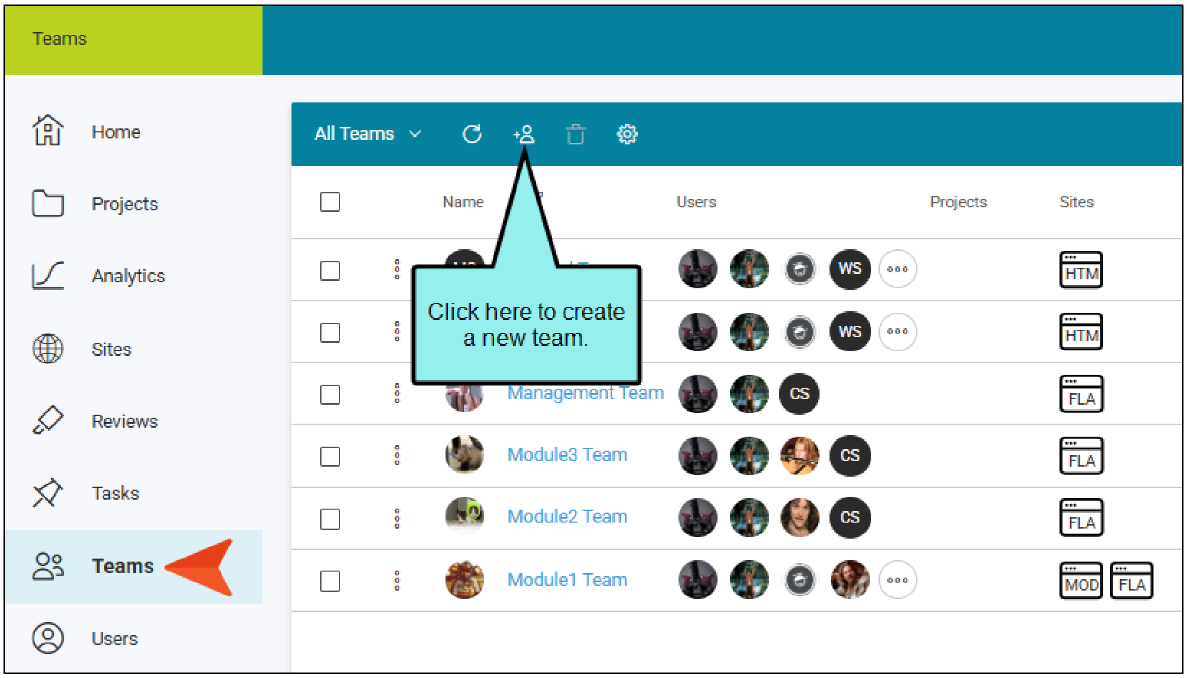
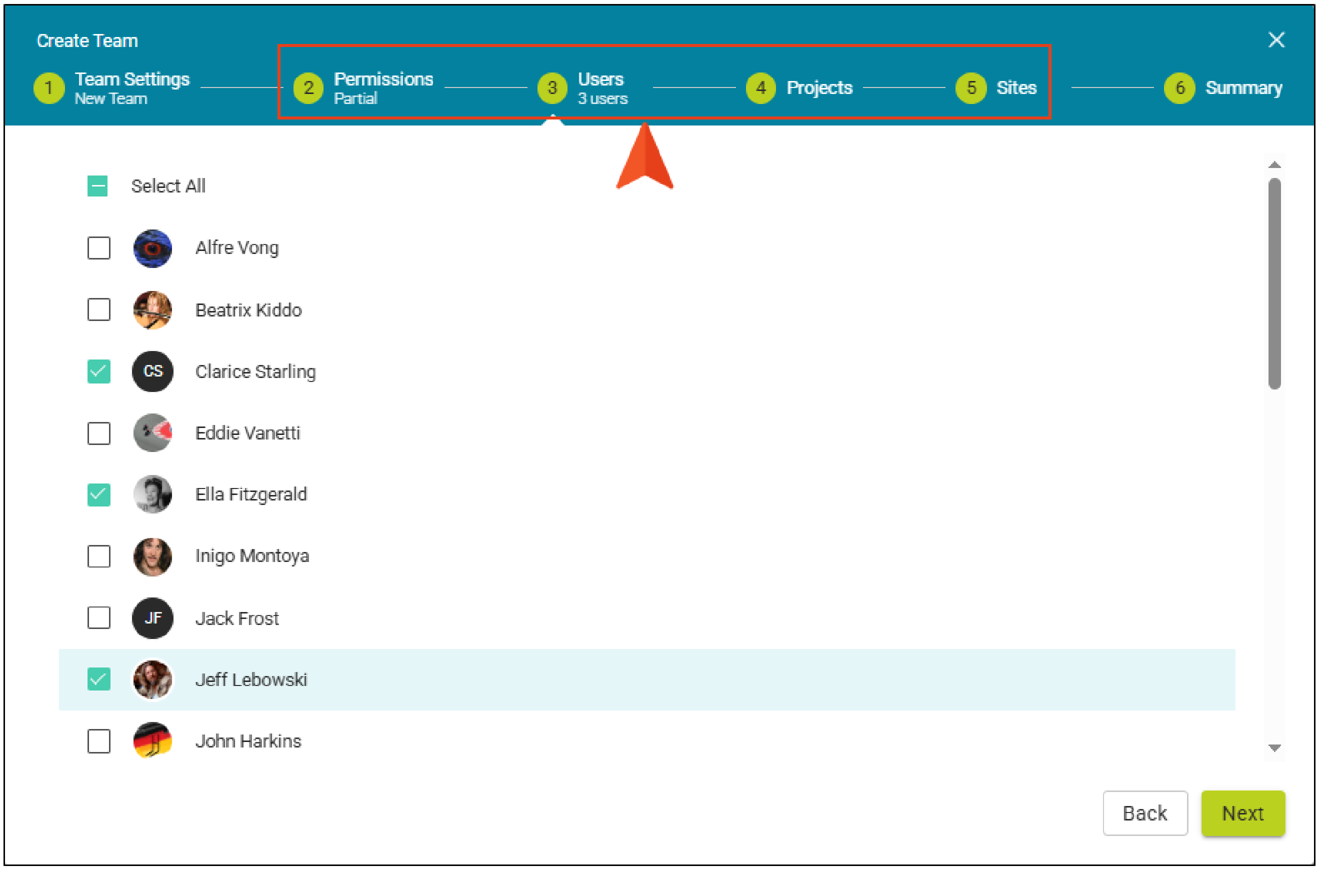
Teams Page

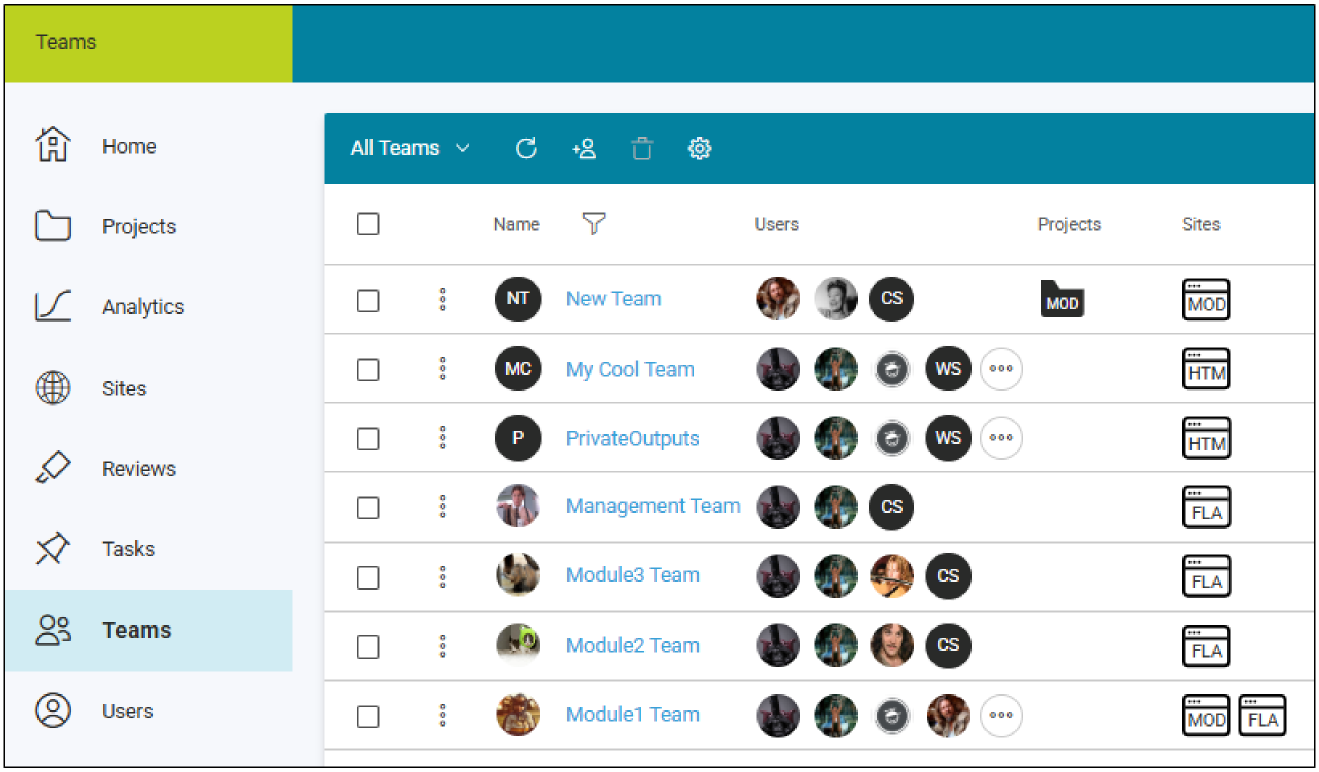
The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects, as well as to give users permissions on the license. Teams are also important if you produce private output, because only members of a team that is associated with the private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



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



Main Activities

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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

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:

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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.

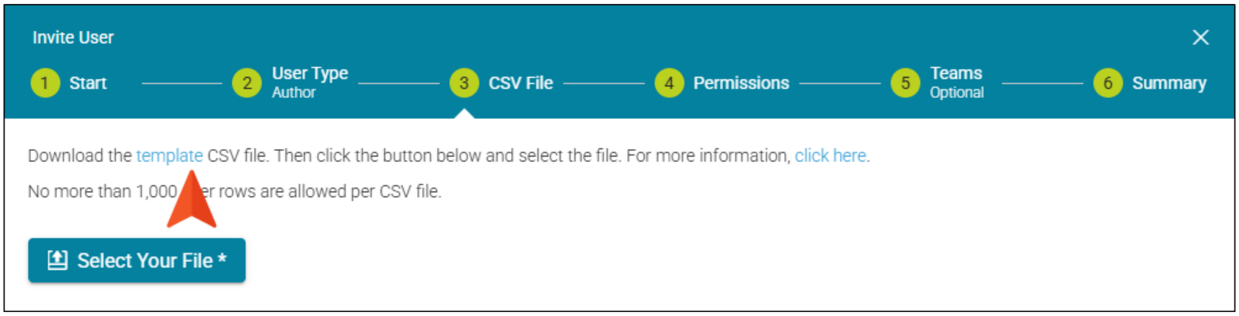
> NOTE You can have no more than 1,000 user rows per CSV file. So for example, if you need to send out invitations to 4,813 users, it's best to put those users into five separate CSV files, and go through the invite process in Flare Online five separate times (one for each file).

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.

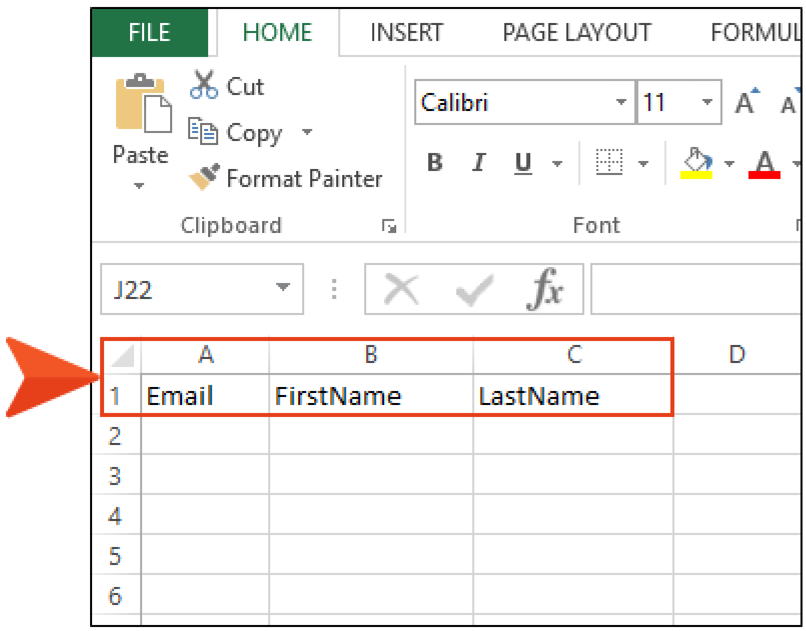
    Alternatively, you can deactivate an existing user to free up a user seat.

    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.

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:

How to Set User Permissions

1. On the left side of the interface, click **Users**.
2. In the grid, click the avatar or name of the user.
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 user the appropriate permissions in the system.
   - **Administrative** Adds check marks to all of the following administrator tasks.
     - **Create/Edit Tasks** Lets the user create and make changes to tasks. Users without this permission can view tasks only.
     - **Delete Projects** Lets the user permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
     - **Delete Teams** Lets the user remove teams from MadCap Flare Online.
     - **Delete Users** Lets the user delete others from MadCap Flare Online license and remove all data associated with them (except project content).
     - **Manage Output Analytics Keys** Lets the user create, edit, or delete Analytics keys.
     - **Manage Sites** Lets the user create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
     - **Manage Teams/Projects** Lets the user 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 Lets the user buy more seats and space.
- Server Management Lets the user 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 Lets the user connect channels from a Slack account to Flare Online. This will then 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 Lets the user create a new project in Flare Online, or lets the user 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 Lets the user import projects and download content from projects on MadCap Flare Online.
- Manage Reviews Lets the user create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
- Manage Translation Package Lets the user create a translation package and send it out for translation.
- Push Lets the user upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
- Scan Lets the user scan a project manually in the Reports view.
- Builds Adds check marks to all of the following output-related tasks.
    - Delete Builds Lets the user delete output.
    - Manage Builds Lets the user mark a particular build as "keep."
    - Run/Schedule Builds Lets the user manually start or schedule builds for projects.
    - View/Download Builds Lets the user view generated output and download it to the desktop.

- **Files** Adds check marks to the following authoring-related tasks.
    - **Create/Edit Files** Lets the user add and edit new files to the project. If this is deselected, the user is allowed to view files in a read-only mode, and the Workspace page vertical three-dot menu is not available.
    - **Edit Code** Lets the user edit XHTML code. If this is deselected, the Code view is read-only.
    - **Edit Files With AI Assist** Lets the user 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)	☑ Edit Files With AI Assist 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.
Analytics	☑ Manage Output Analytics Keys
Creating and Editing Files	☑ Create/Edit Files
Changing the Status of a Project (Active, Archive, Lock)	☑ Manage Teams/Projects
Editing Code	☑ Edit Code

Activity	Permission Required
Creating Projects Uploading (Binding) Projects	Create/Upload New Projects
Creating Project Checklists	Must be Associated with the Project
Deleting Builds	Delete Builds
Deleting Project Checklists	Must be Associated with the Project
Deleting Projects	Delete Projects
Downloading Builds	View/Download Builds
Editing and Annotating Review Files	Must be Part of the Review Process for the File
Editing Project Checklists	Must be Associated with the Project
Editing Project Profiles	Manage Teams/Projects
Generating and Scheduling Builds	Run/Schedule Builds
Importing Projects	Import/Pull

Activity	Permission Required
Managing Review Packages	Manage Reviews
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)	Import/Pull
Pushing Content (Upload content from projects in Flare Desktop to Flare Online)	Push
Scanning Projects for Reports	Scan
Setting Builds as Keep	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

Activity	Permission Required
Viewing Output	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	Server Management
Creating Viewer Users On Demand	Server Management
Purchasing Seats and Storage Space	Purchasing
Setting a License Avatar	Server Management
Setting the License Vanity	Server Management
Setting Security Options	Server Management
Setting Up Single Sign-On Authentication on a License	Server Management

Activity	Permission Required
Slack Integration	Slack Integration
Sites	
Adding Host Mapped Domains	Server Management
Associating Teams With Sites	Manage Sites
Creating Content Security Policies	Manage Sites
Creating Sites	Manage Sites
Creating Themes	Manage Sites
Deleting Sites	Manage Sites
Editing Sites	Manage Sites
Excluding Live Sites from Search Engines	Manage Sites
Setting the License Vanity	Manage Sites
Setting Site Vanities	Manage Sites

Activity	Permission Required
Setting Sites as Live	Manage Sites
Setting Sites as Private	Manage Sites
Tasks	
Adding Comments to Tasks	Create/Edit Tasks
Creating Tasks	Create/Edit Tasks
Deleting Tasks	Create/Edit Tasks
Editing Tasks	Create/Edit Tasks
Moving Tasks	Create/Edit Tasks
Viewing Task Details	No Special Permission Required

Activity	Permission Required
Teams	
Creating Teams	☑ Manage Teams/Projects
Deleting Teams	☑ Delete Teams
Editing Teams	☑ Manage Teams/Projects
Setting Team Permissions	☑ User Administration ☑ Manage Teams/Projects
Translation	
Creating a Translation Branch	☑ Manage Translation Package
Users	
Inviting Users	☑ User Administration
Assigning Users to Teams and Projects	☑ Manage Teams/Projects
Changing Your Password	No Special Permission Required

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

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 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

Click **Edit**, then expand the sections, and select check boxes to associate yourself with various teams and projects.

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" below.

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*.

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:

- [x] Manage Teams/Projects

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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. Click **Edit**.
6. In the **Teams** section, you can you can associate teams with a user.
7. In the **Projects** section, you can associate projects with an author.
8. Click **Save**.

> 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.

CHAPTER 3

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

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.

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.

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 63.

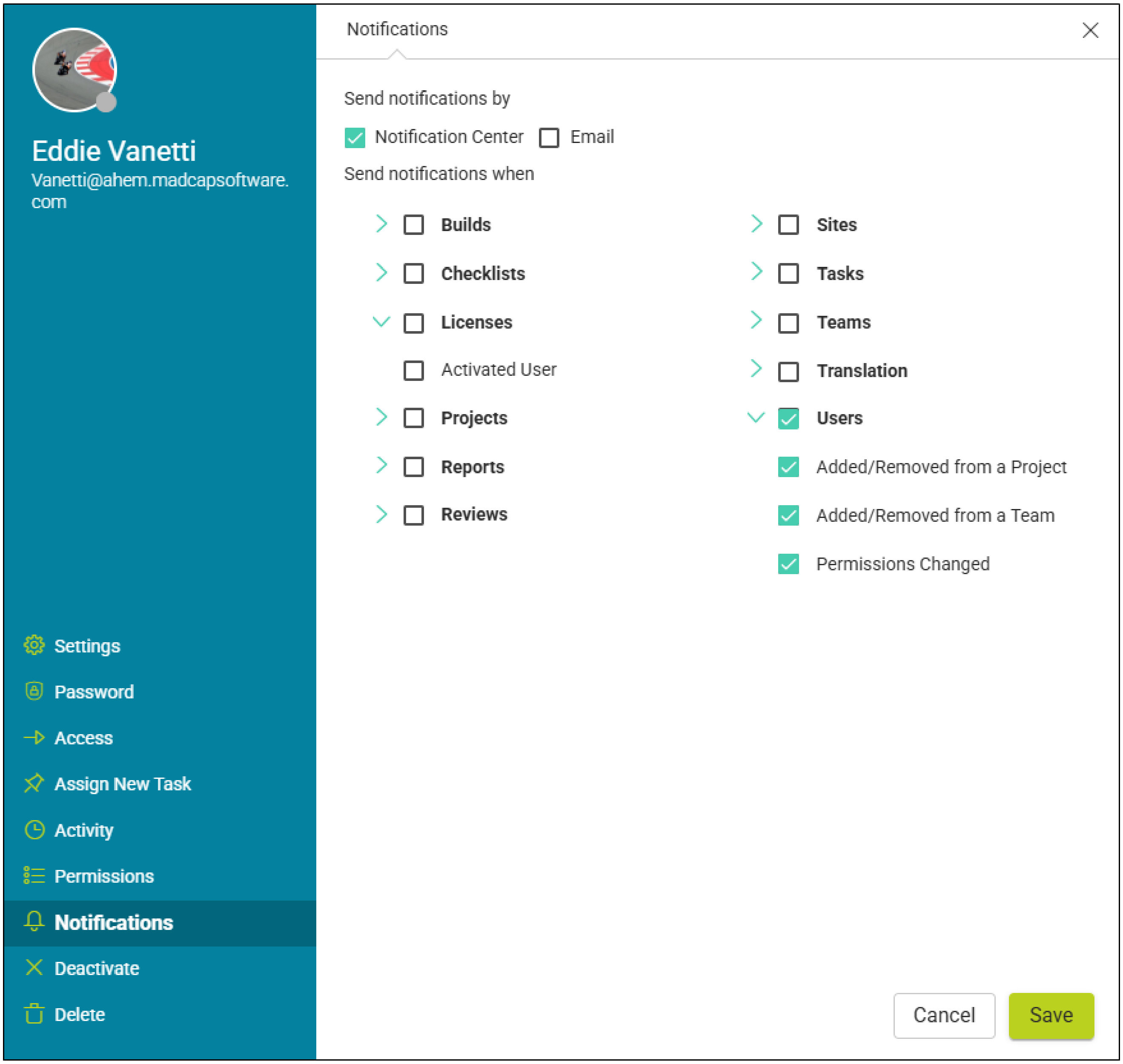
For more information about permissions, see the Help system.

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.



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 63.

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 63.

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**.

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:

User Administration

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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?

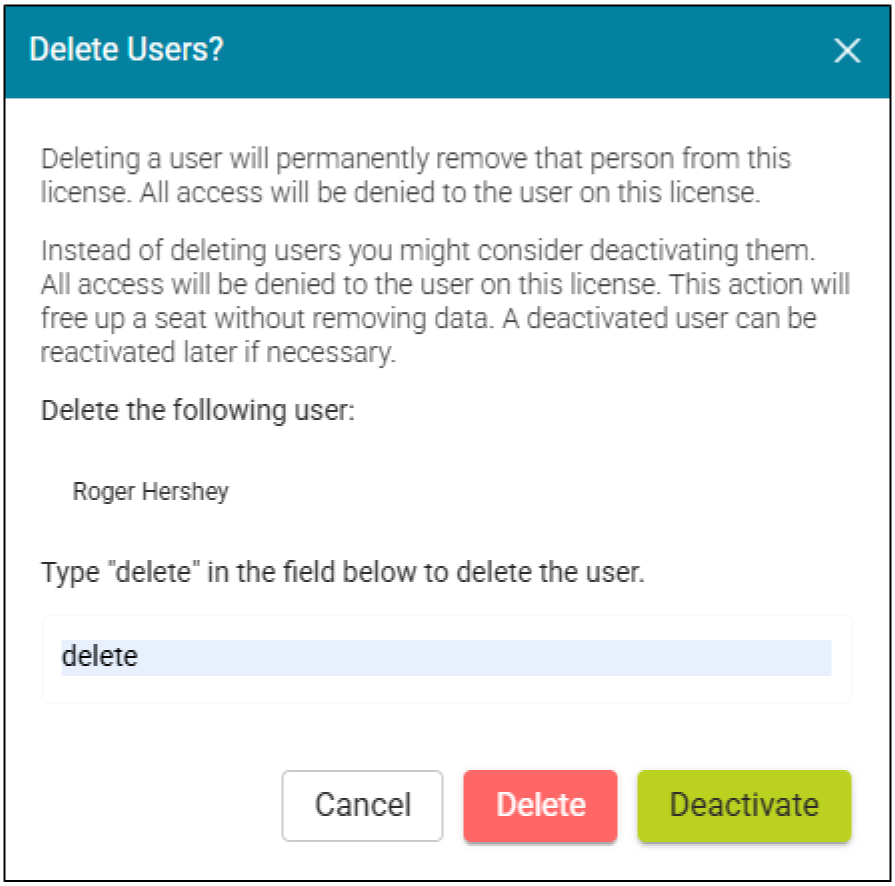
For this activity, you must have the following permission setting:

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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 49.

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

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:

Manage Teams/Projects

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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 user the appropriate permissions in the system.

- **Administrative** Adds check marks to all of the following administrator tasks.
    - **Create/Edit Tasks** Lets the user create and make changes to tasks. Users without this permission can view tasks only.
    - **Delete Projects** Lets the user permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
    - **Delete Teams** Lets the user remove teams from MadCap Flare Online.
    - **Delete Users** Lets the user delete others from MadCap Flare Online license and remove all data associated with them (except project content).
    - **Manage Output Analytics Keys** Lets the user create, edit, or delete Analytics keys.
    - **Manage Sites** Lets the user create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
    - **Manage Teams/Projects** Lets the user 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** Lets the user buy more seats and space.
    - **Server Management** Lets the user 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** Lets the user connect channels from a Slack account to Flare Online. This will then 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** Lets the user create a new project in Flare Online, or lets the user 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 Lets the user import projects and download content from projects on MadCap Flare Online.
- Manage Reviews Lets the user create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
- Manage Translation Package Lets the user create a translation package and send it out for translation.
- Push Lets the user upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
- Scan Lets the user scan a project manually in the Reports view.
- Builds Adds check marks to all of the following output-related tasks.
    - Delete Builds Lets the user delete output.
    - Manage Builds Lets the user mark a particular build as "keep."
    - Run/Schedule Builds Lets the user manually start or schedule builds for projects.
    - View/Download Builds Lets the user view generated output and download it to the desktop.
- Files Adds check marks to the following authoring-related tasks.
    - Create/Edit Files Lets the user add and edit new files to the project. If this is deselected, the user is allowed to view files in a read-only mode, and the Workspace page vertical three-dot menu is not available.
    - Edit Code Lets the user edit XHTML code. If this is deselected, the Code view is read-only.
    - Edit Files With AI Assist Lets the user 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 63.

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.

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:

☑ Manage Teams/Projects

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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 team profiles with a large set of data (e.g., 100 users 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:

- [x] User Administration
- [x] 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 **Users**.
2. In the grid, click the avatar or name of the user.
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 user the appropriate permissions in the system.
   - **Administrative** Adds check marks to all of the following administrator tasks.
     - **Create/Edit Tasks** Lets the user create and make changes to tasks. Users without this permission can view tasks only.
     - **Delete Projects** Lets the user permanently remove projects from MadCap Flare Online. Projects on the user's desktop are not deleted.
     - **Delete Teams** Lets the user remove teams from MadCap Flare Online.
     - **Delete Users** Lets the user delete others from MadCap Flare Online license and remove all data associated with them (except project content).
     - **Manage Output Analytics Keys** Lets the user create, edit, or delete Analytics keys.
     - **Manage Sites** Lets the user create and manage sites, and features associated with sites, such as vanities, private outputs, and themes.
     - **Manage Teams/Projects** Lets the user 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** Lets the user buy more seats and space.
        - **Server Management** Lets the user 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** Lets the user connect channels from a Slack account to Flare Online. This will then 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** Lets the user create a new project in Flare Online, or lets the user 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** Lets the user import projects and download content from projects on MadCap Flare Online.
        - **Manage Reviews** Lets the user create a review package in Flare Online, edit files within a review package, and delete a review package from a project.
        - **Manage Translation Package** Lets the user create a translation package and send it out for translation.
        - **Push** Lets the user upload content from projects in Flare Desktop to associated projects on MadCap Flare Online.
        - **Scan** Lets the user scan a project manually in the Reports view.
        - **Builds** Adds check marks to all of the following output-related tasks.
            - **Delete Builds** Lets the user delete output.
            - **Manage Builds** Lets the user mark a particular build as "keep."
            - **Run/Schedule Builds** Lets the user manually start or schedule builds for projects.
            - **View/Download Builds** Lets the user view generated output and download it to the desktop.

- **Files** Adds check marks to the following authoring-related tasks.
    - **Create/Edit Files** Lets the user add and edit new files to the project. If this is deselected, the user is allowed to view files in a read-only mode, and the Workspace page vertical three-dot menu is not available.
    - **Edit Code** Lets the user edit XHTML code. If this is deselected, the Code view is read-only.
    - **Edit Files With AI Assist** Lets the user 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)	☑ Edit Files With AI Assist 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.
Analytics	☑ Manage Output Analytics Keys
Creating and Editing Files	☑ Create/Edit Files
Changing the Status of a Project (Active, Archive, Lock)	☑ Manage Teams/Projects
Editing Code	☑ Edit Code

Activity	Permission Required
Creating Projects Uploading (Binding) Projects	Create/Upload New Projects
Creating Project Checklists	Must be Associated with the Project
Deleting Builds	Delete Builds
Deleting Project Checklists	Must be Associated with the Project
Deleting Projects	Delete Projects
Downloading Builds	View/Download Builds
Editing and Annotating Review Files	Must be Part of the Review Process for the File
Editing Project Checklists	Must be Associated with the Project
Editing Project Profiles	Manage Teams/Projects
Generating and Scheduling Builds	Run/Schedule Builds
Importing Projects	Import/Pull

Activity	Permission Required
Managing Review Packages	☑ Manage Reviews
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)	☑ Import/Pull
Pushing Content (Upload content from projects in Flare Desktop to Flare Online)	☑ Push
Scanning Projects for Reports	☑ Scan
Setting Builds as Keep	☑ 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

Activity	Permission Required
Viewing Output	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	Server Management
Creating Viewer Users On Demand	Server Management
Purchasing Seats and Storage Space	Purchasing
Setting a License Avatar	Server Management
Setting the License Vanity	Server Management
Setting Security Options	Server Management
Setting Up Single Sign-On Authentication on a License	Server Management

Activity	Permission Required
Slack Integration	Slack Integration
Sites	
Adding Host Mapped Domains	Server Management
Associating Teams With Sites	Manage Sites
Creating Content Security Policies	Manage Sites
Creating Sites	Manage Sites
Creating Themes	Manage Sites
Deleting Sites	Manage Sites
Editing Sites	Manage Sites
Excluding Live Sites from Search Engines	Manage Sites
Setting the License Vanity	Manage Sites
Setting Site Vanities	Manage Sites

Activity	Permission Required
Setting Sites as Live	☑ Manage Sites
Setting Sites as Private	☑ Manage Sites
Tasks	
Adding Comments to Tasks	☑ Create/Edit Tasks
Creating Tasks	☑ Create/Edit Tasks
Deleting Tasks	☑ Create/Edit Tasks
Editing Tasks	☑ Create/Edit Tasks
Moving Tasks	☑ Create/Edit Tasks
Viewing Task Details	No Special Permission Required

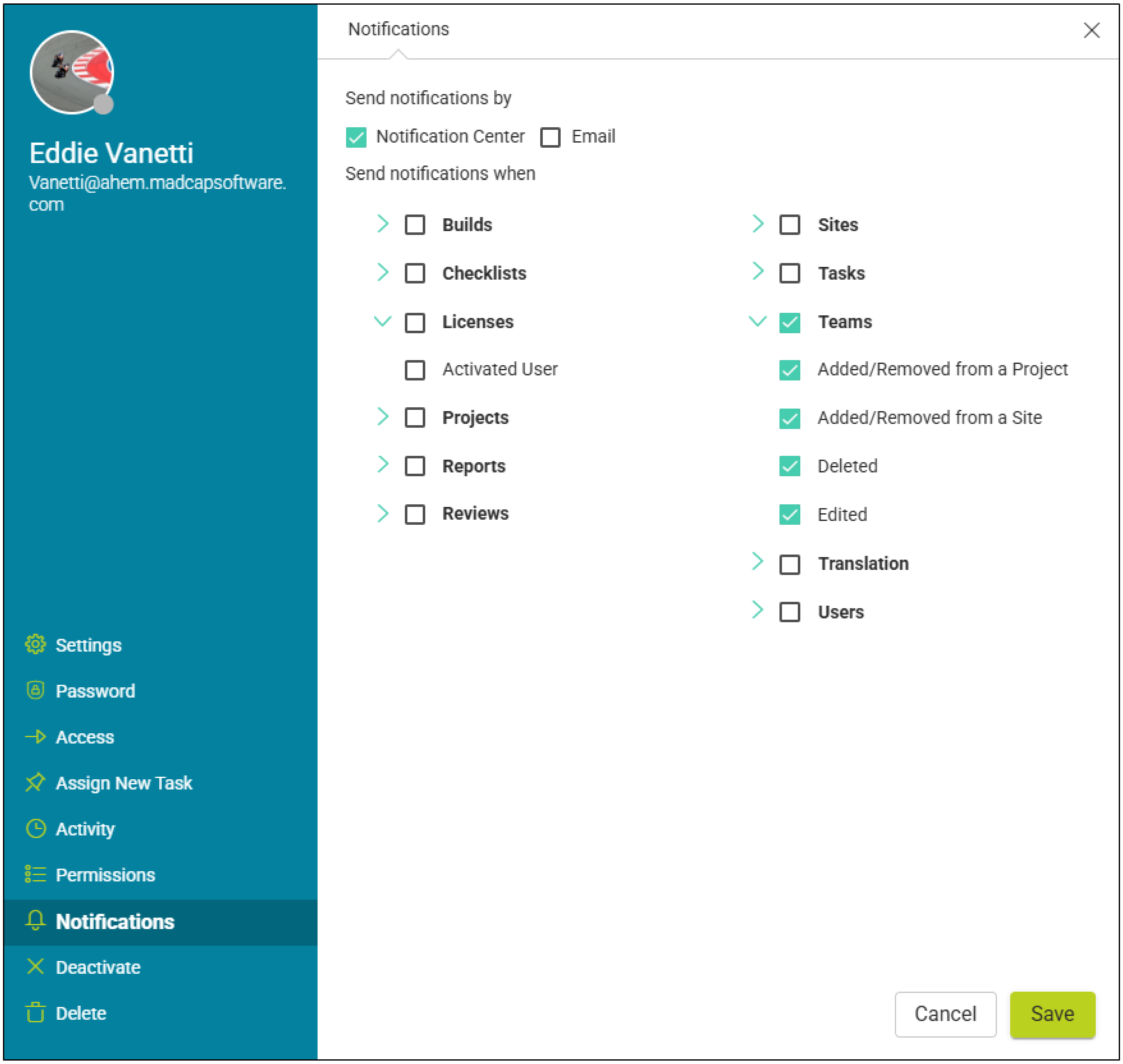
Activity	Permission Required
Teams	
Creating Teams	☑ Manage Teams/Projects
Deleting Teams	☑ Delete Teams
Editing Teams	☑ Manage Teams/Projects
Setting Team Permissions	☑ User Administration ☑ Manage Teams/Projects
Translation	
Creating a Translation Branch	☑ Manage Translation Package
Users	
Inviting Users	☑ User Administration
Assigning Users to Teams and Projects	☑ Manage Teams/Projects
Changing Your Password	No Special Permission Required

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

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.



Deleting Teams

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

Permission Required?

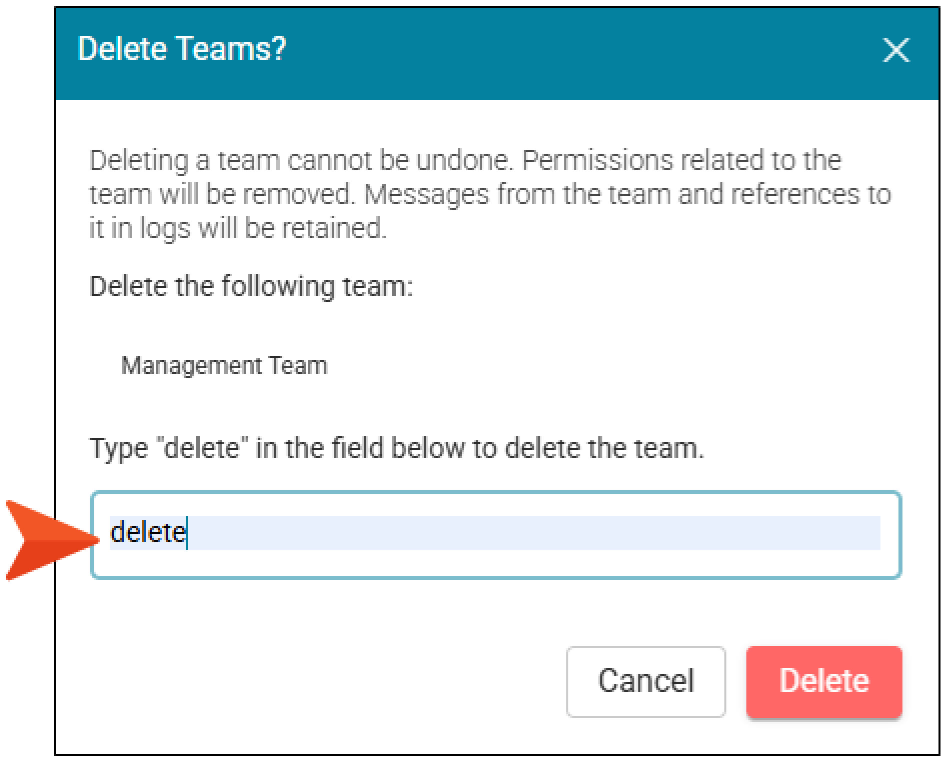
For this activity, you must have the following permission setting:

For more information about permissions, see "Setting User Permissions" on page 19 or "Setting Team Permissions" on page 63.

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**.

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*