madcap software

USER GUIDE

MADCAP FLARE ONLINE

Building Output Guide

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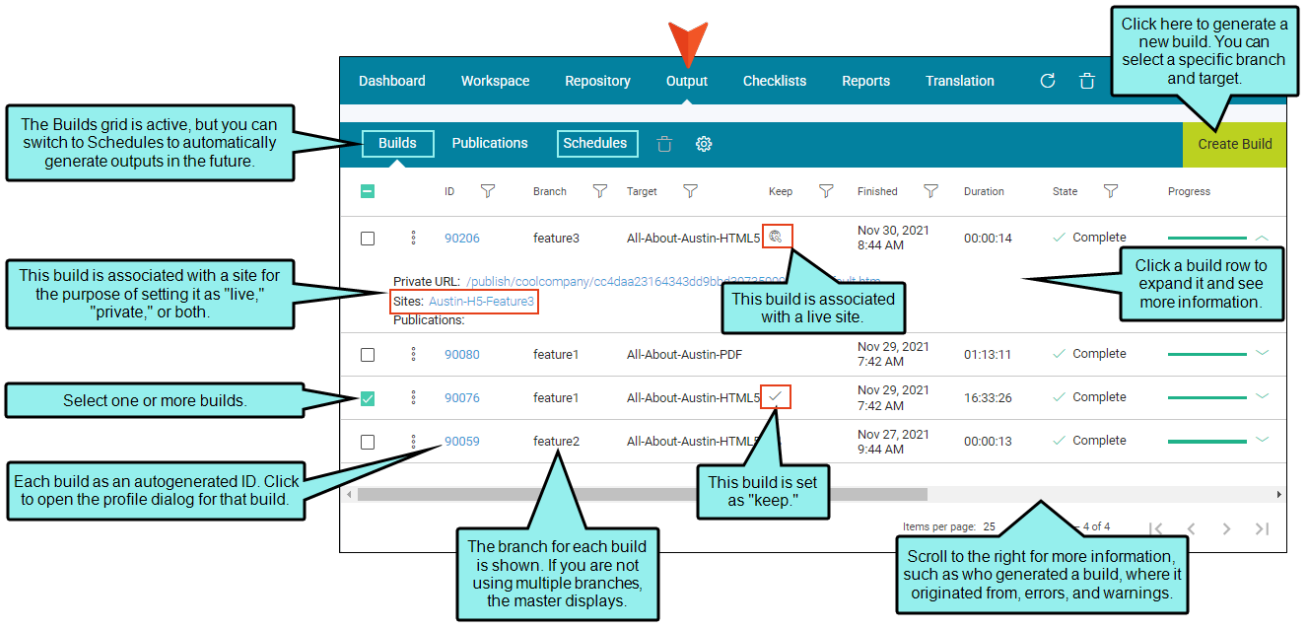
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CHAPTER 1

Introduction

If you are associated with a project and have the appropriate permissions, you can open the Output view of a project. From here, you can generate builds, publish to locations outside of Flare Online, and manage various aspects of the project's output.



Main Activities

- "Generating and Scheduling Builds" on page 7
- "Publications" on page 54 (publishing to external locations)
- "Publishing Directly to Flare Online" on page 22
- "Viewing Output" on page 25
- "Using Analytics" on page 26
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Other Activities and Information

- "Opening the Build Profile Dialog" on page 30
- "Setting Builds as Keep" on page 34
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CHAPTER 2

Main Activities for Builds

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

This chapter discusses the following:

Generating and Scheduling Builds 7
Publishing Directly to Flare Online 22
Viewing Output 25
Using Analytics 26
Deleting Builds 27

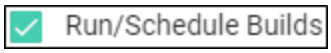
Generating and Scheduling Builds

If you are associated with projects in Flare Online, you can open the Output view of the Projects page. From here, you can manually build targets (such as HTML5, PDF, and others), or you can schedule targets to be generated. If you are using branching, you can build output for a specific branch.

One of the advantages of using Flare Online for your translation needs is that you can easily create single language output (i.e., one target is generated for each language) or multilingual output (i.e., one target is generated for multiple languages).

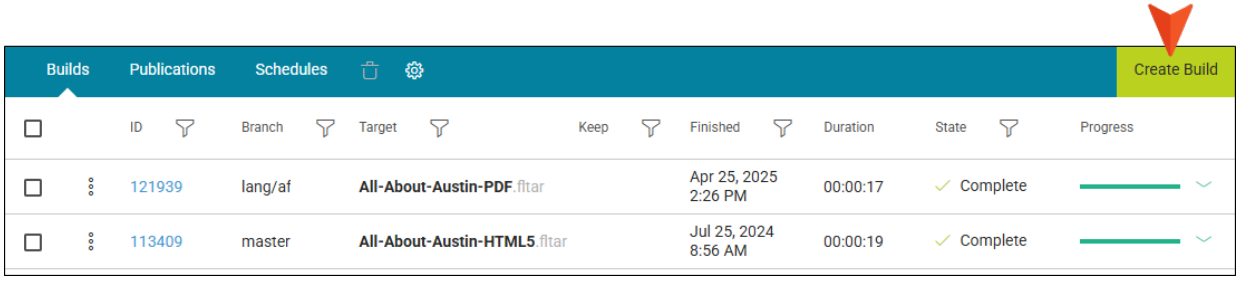
Permission Required?

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



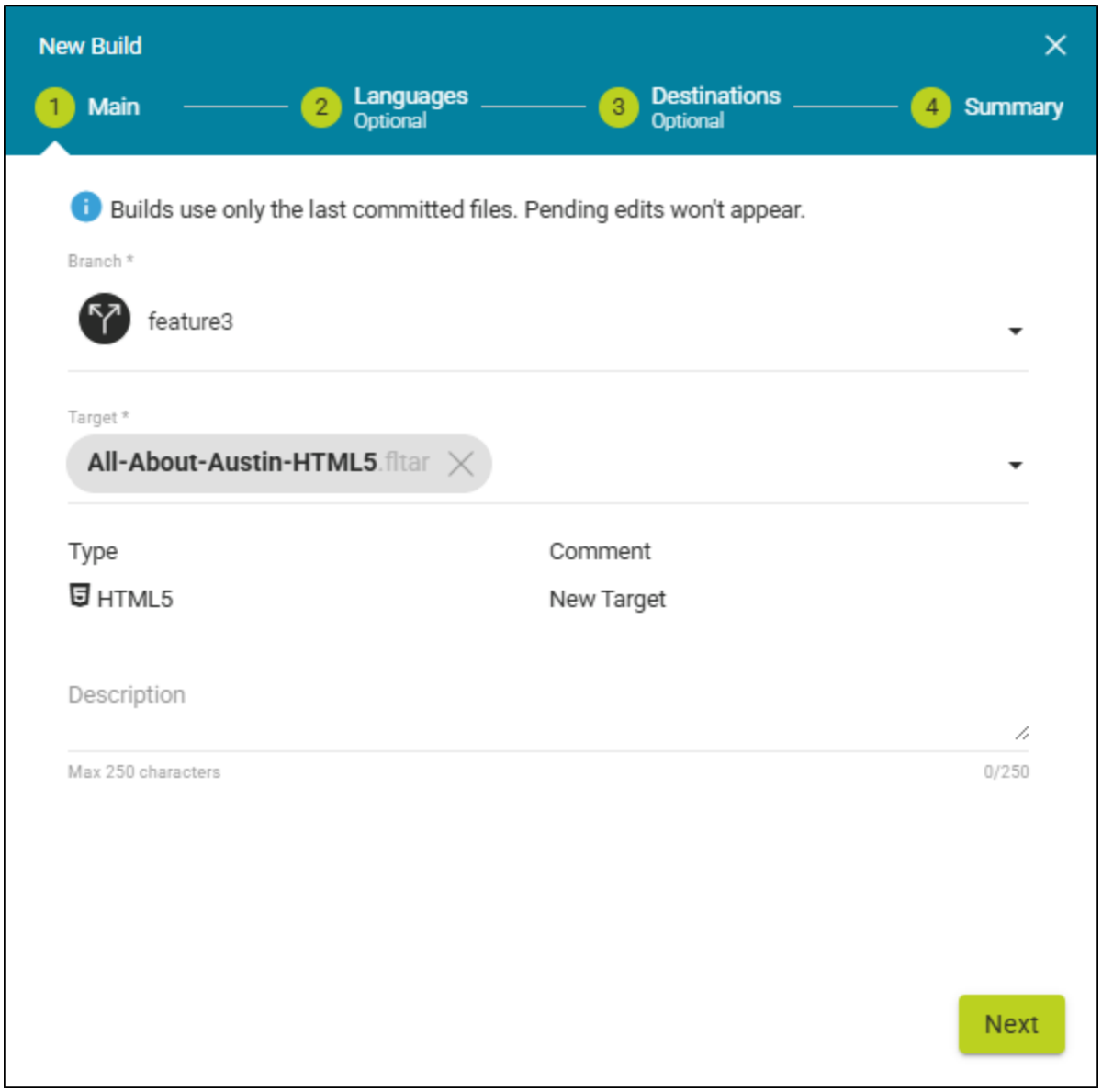
How to Generate a Target Manually

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the upper-right, click **Create Build**.

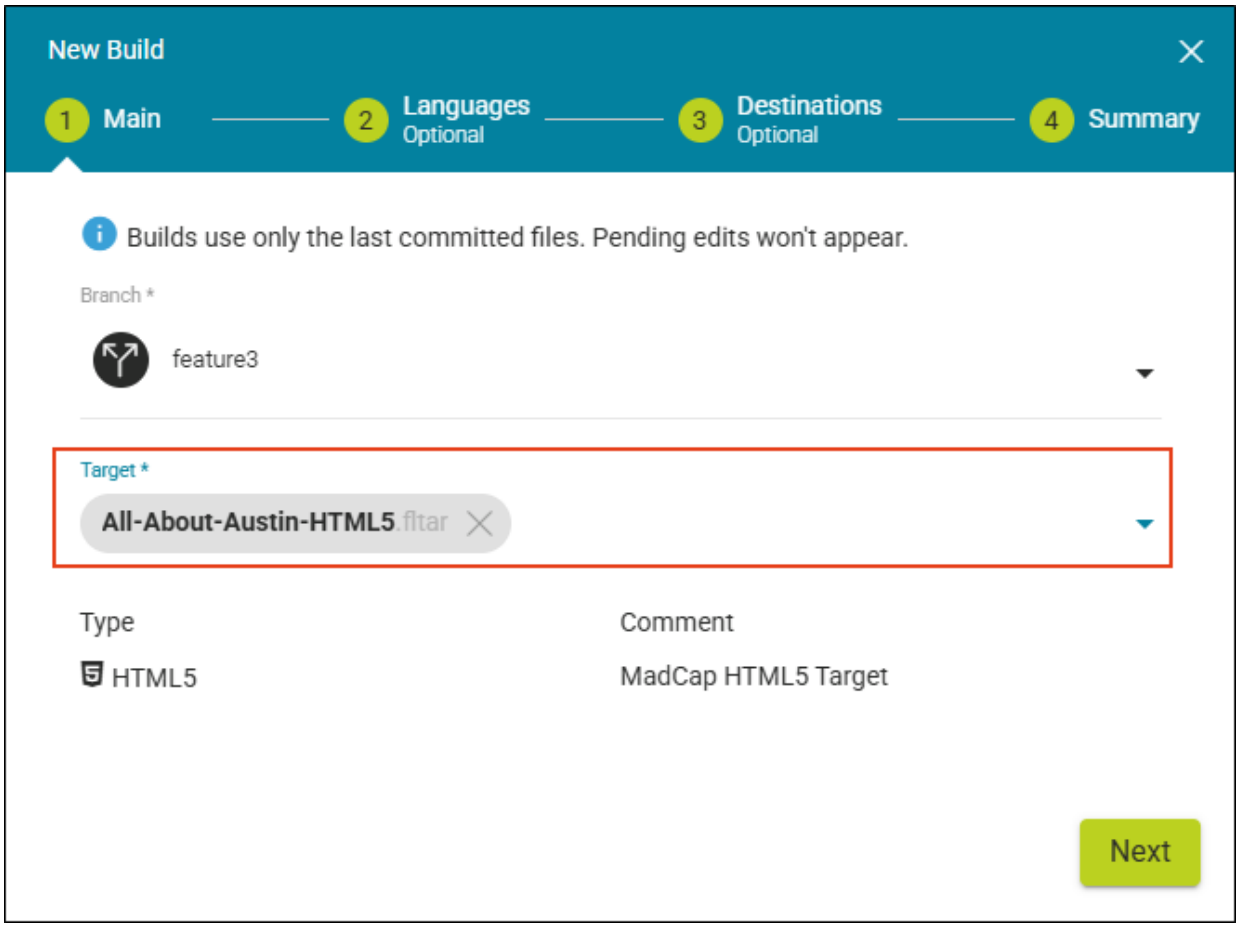


The New Build wizard opens.

4. From the **Branch** field, select the appropriate branch. If you are not using branching, you will always be building from the master branch.

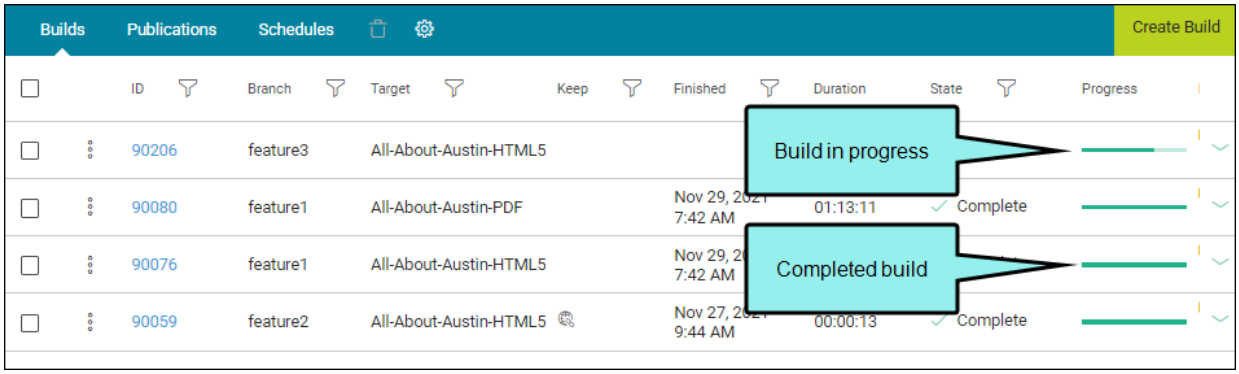


5. From the **Target** field, select the target you want to build.

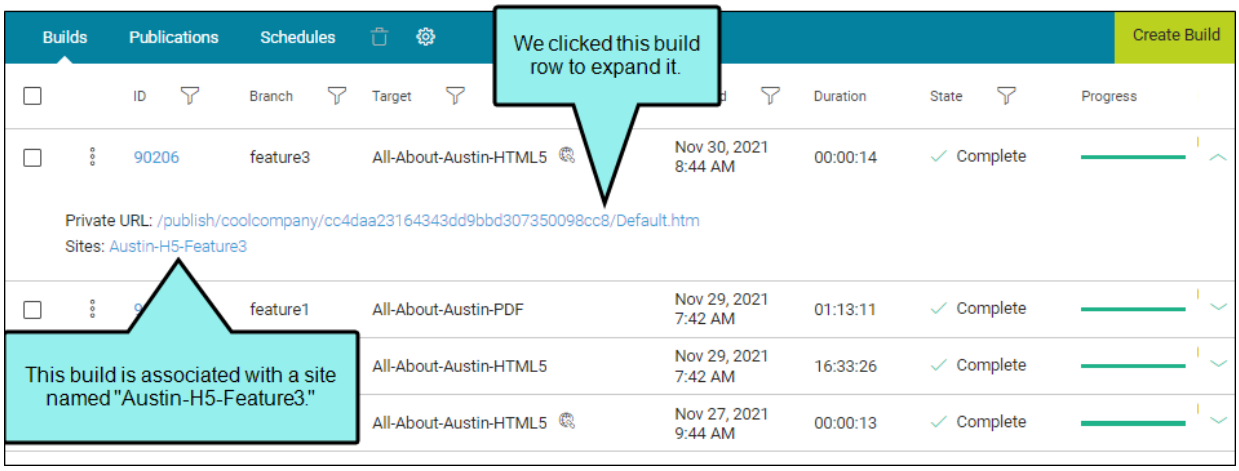


6. Click **Next**.
7. (Optional) For single language output you can skip this screen, and select **Next**. However, if you want to build multilingual output you can select an additional language branch.
8. (Optional) To set up a build to also publish to an external location, select a destination(s). You can skip this screen and choose destinations later. Click **Next**.
9. Review a summary of your build options, and click **Build**. If you need to adjust the options, select **Back**. (If you are building and publishing via this wizard, click the **Build and Publish** button.)

   A row is added to the page, showing the progress of the target as it is generated. If the target generates successfully, the color of the Progress column changes from light to dark green, and the State column displays "Complete."



If you click a build row (not the check box), the row expands, showing details about the selected build (i.e., the private URL and whether the build is associate with a site).



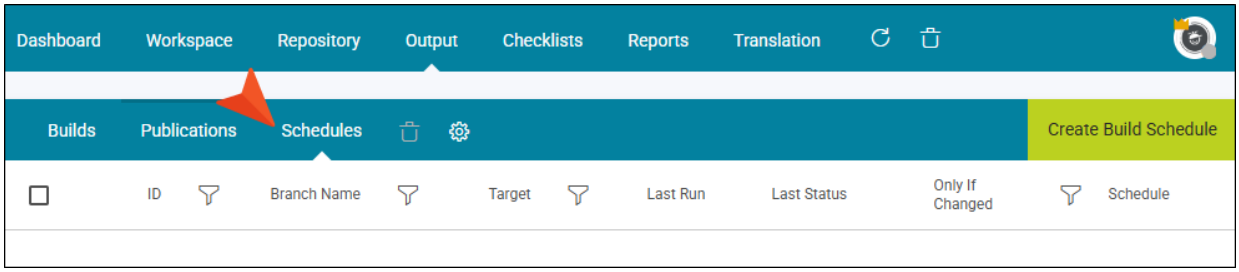
NOTE You might notice that it takes somewhat longer for a target to build in Flare Online, compared with building it locally in Flare Desktop.

NOTE Certain Flare Desktop features are not supported when generating output from Flare Online. This includes limitations on which output formats can be viewed from Flare Online. See "Flare Desktop Features Not Supported in MadCap Flare Online" on page 50.

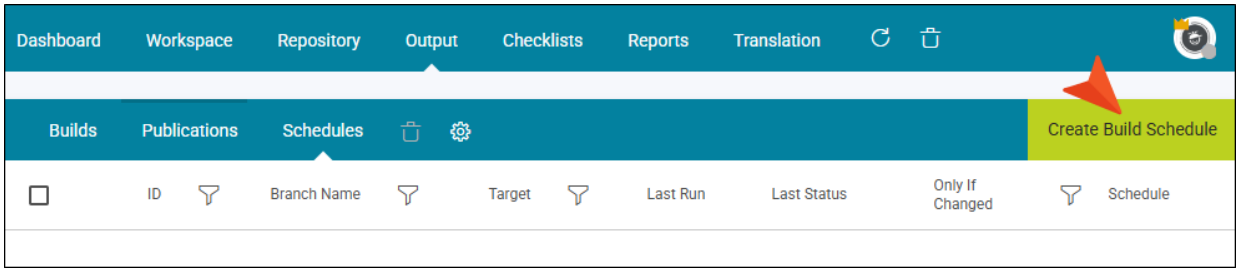
NOTE If you intend to build a target that links to an outside project (e.g., for the purpose of importing files via Global Project Linking, project merging, or multilingual output), make sure that the other project is also uploaded to Flare Online. Otherwise, the automated imports or merging will not work.

How to Schedule a Target to Be Generated

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. At the top of the grid area, select **Schedules**.

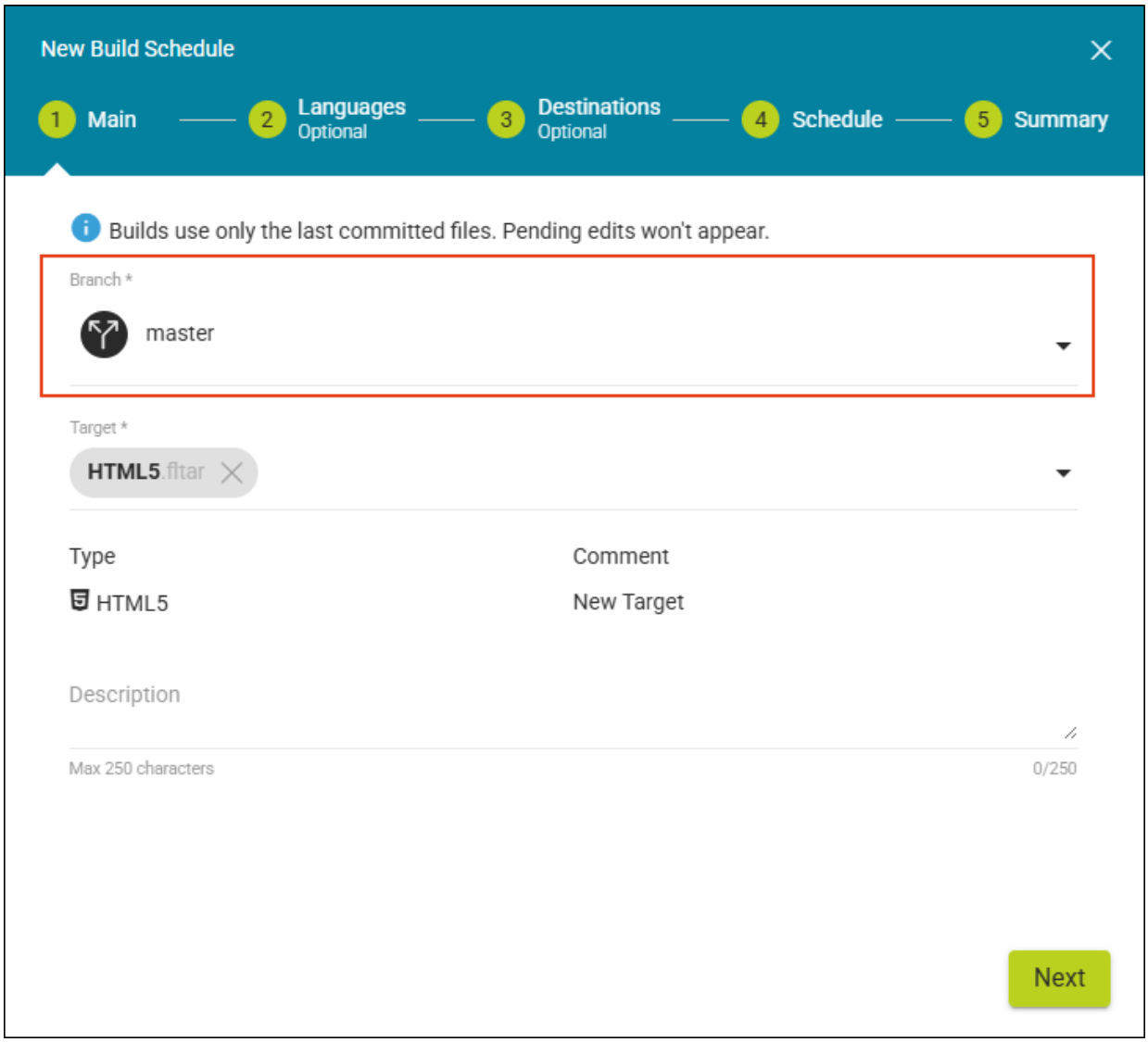


4. In the upper-right, click **Create Build Schedule**.

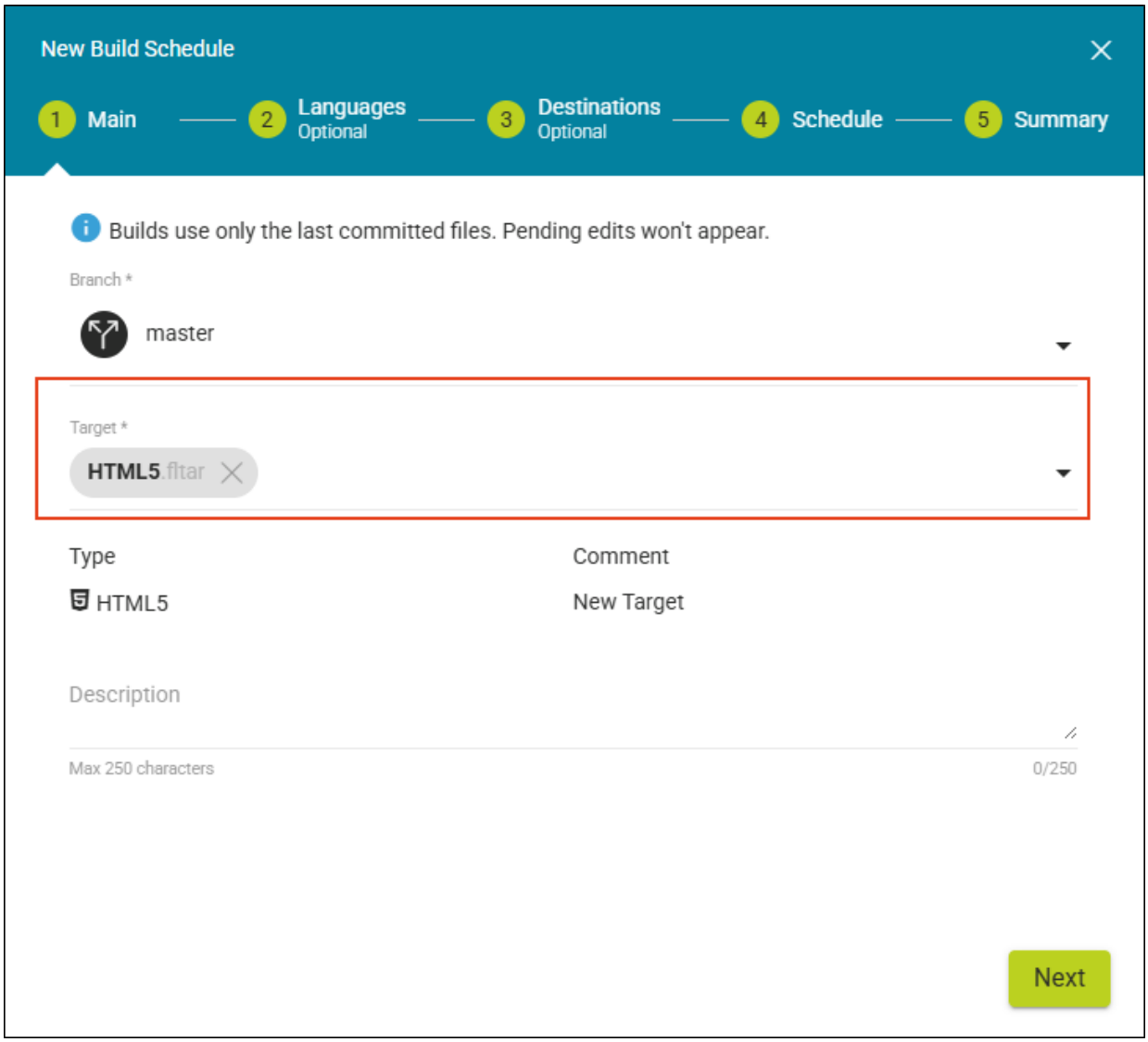


The Create Build Schedule wizard opens.

5. From the **Branch** field, select the appropriate branch. If you are not using branching, you will always be building from the master branch.



6. From the **Target** field, select the target you want to build.

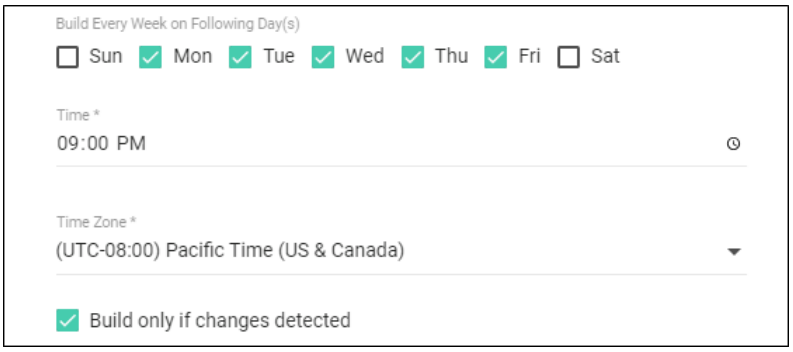


7. Click **Next**.
8. (Optional) For single language output you can skip this screen, and select **Next**. However, if you want to build multilingual output you can select an additional language branch.
9. (Optional) To set up a scheduled build to also publish to an external location, select a destination(s). You can skip this screen and choose destinations later. Click **Next**.
10. In the Schedule screen, complete the fields.
    - **Build Every Week on Following Day(s)** Click on the day(s) of the week when you want the target to be generated.
    - **Time** Click the field to manually enter the hour, minutes, PM or AM. Alternatively, click the little clock to the right of the field to select a time from the columns presented in the Time Picker popup. You can use the mouse wheel to rotate through the hour and minutes columns to locate the desired time.
    - **Time zone** Click the down arrow and choose your time zone.
    - **Build only if changes detected** Select this option to generate output on the specified days and times only if no changes to source files were found. If you deselect this option, the target will always be generated, even if no changes are detected in the source files.

☆ EXAMPLE You want to schedule a target to be generated automatically. You want the target to be build every work day (Monday-Friday) at 9 p.m. Pacific time.

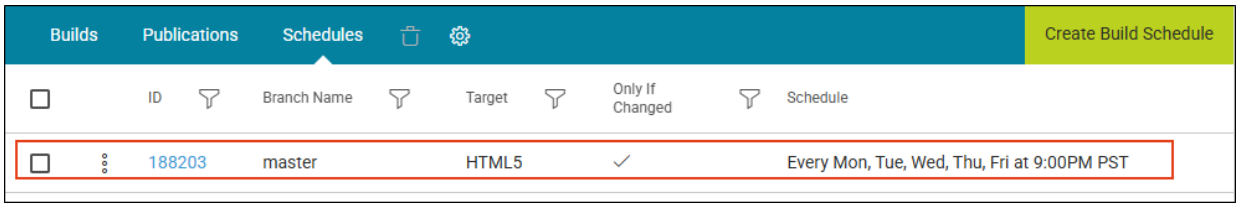
However, you only want the target to be generated if a change is detected in the source files since the previous build.

Your schedule would look something like this:



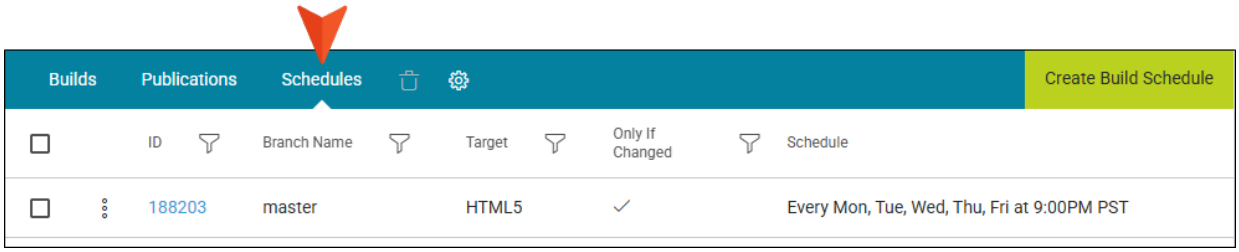
11. Click **Next**.
12. Review a summary of your scheduled build options, and click **Create**. If you need to adjust the options, select **Back**.

    A row is added to the grid, representing that scheduled build.

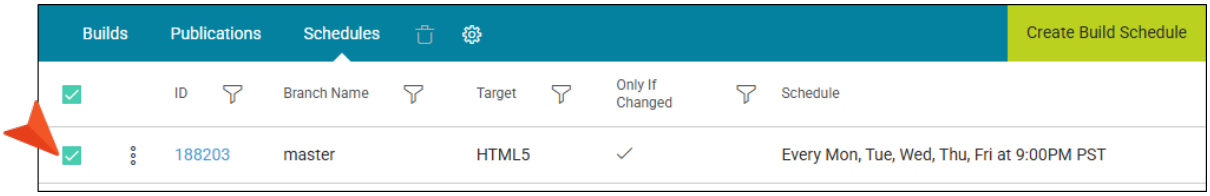


How to Remove a Scheduled Build From a Target

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. At the top of the grid area, select **Schedules**.

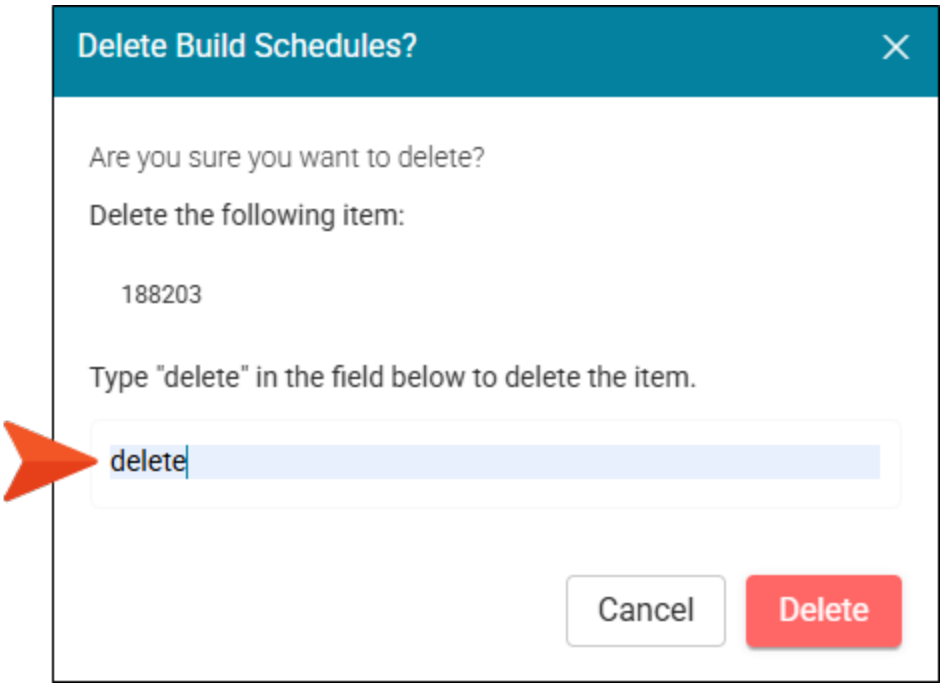


4. In the grid, select the check box next to the scheduled build you want to remove.



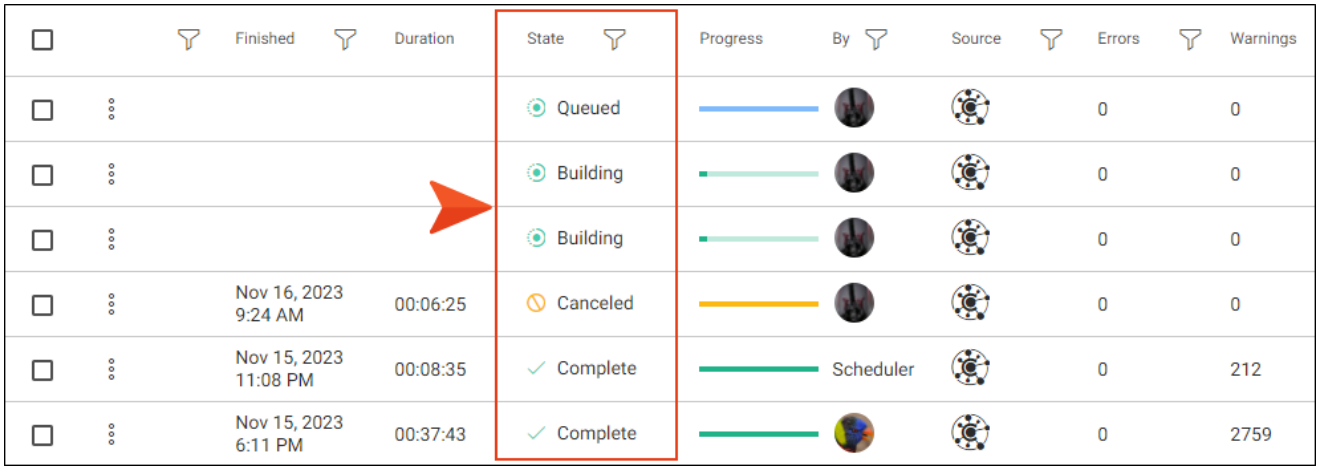
5. In the local toolbar, click .

6. In the dialog that opens, type `delete` in the field, and click **Delete**.



Build State

When you build a target in Flare Online, it is going to have a particular state, depending on various factors.



Queued

When you generate a target in Flare Online, your build is added to a node along with builds from other customers. Therefore, it is queued as it awaits its turn to begin processing. If one node reaches is limit, another one is started in order to process additional builds. Therefore, the wait should be brief for any build that you start.

TIP If you notice that builds are constantly displaying as queued, you can try generating targets at a different, non-peak time of day. Also, if you have many builds that are scheduled to begin at the same time, you can try staggering those start times.

NOTE If a build seems to be stuck in the queued state for quite a long time, please contact technical support.

Getting Files

When a queued build reaches its turn, Flare Online undergoes a brief period where it gathers the necessary files to generate the output.

Building

The "Building" state for a target means that the output is actively being processed. A build can remain in this state for quite some time, depending on the number of files and size of the output.

Publishing

The "Publishing" state for a target means that it has finished compiling and is in the final stages before completion.

Completed

A build reaches the "Completed" state if it generates successfully. You can then expand the build row and click the link to view the output.

Canceled

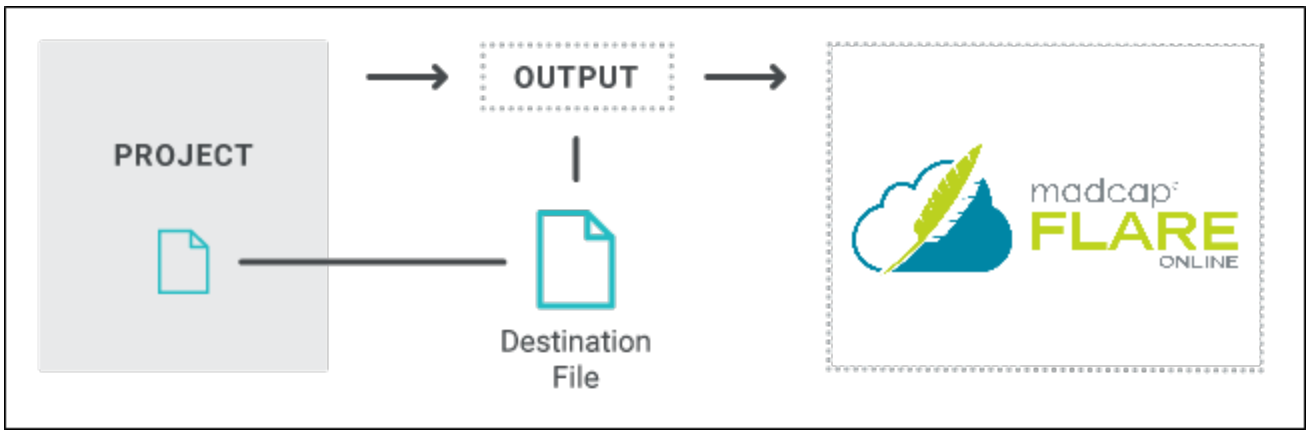
This state displays when someone cancels a build.

Failed

A build might fail for various reasons. If this happens, you can click the three dots at the left of the row and select View Log from the menu. This can give you an indication as to why the build was not successful. See "Opening the Build Log" on page 39.

Publishing Directly to Flare Online

As an alternative to building a target in Flare Online, you can publish output directly from a local project in Flare Desktop to Flare Online. This is possible via a destination file that Flare Desktop automatically creates for you. By "publish," we mean copying your output files to Flare Online, not making that output "live," which would make it visible to the general public. You would still need to use Flare Online to make that output accessible to end users.

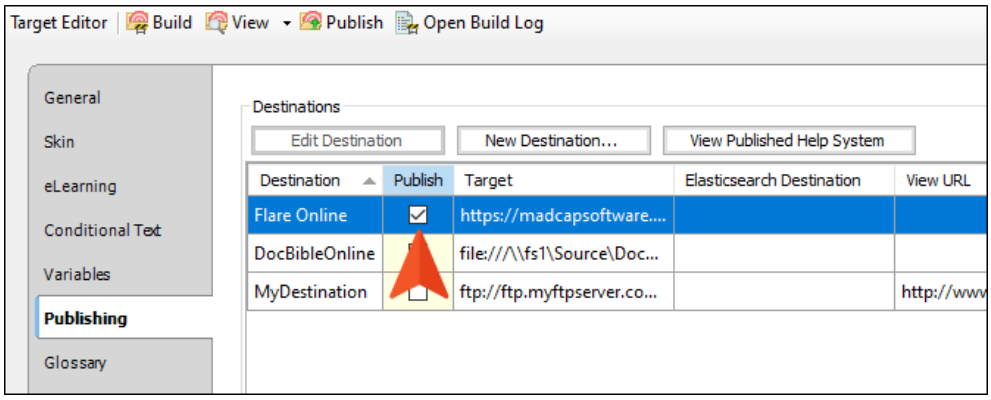


How to Publish Directly to Flare Online

1. If it is not already done, upload a local project from Flare Desktop to Flare Online.
2. In the local project in Flare Desktop, open a target.

> NOTE If you are using Git branching, make sure the appropriate branch is active. When you build and publish the output, it will be for that branch.

3. Select the **Publishing** tab.
4. Next to the **Flare Online** destination, click the **Publish** check box.

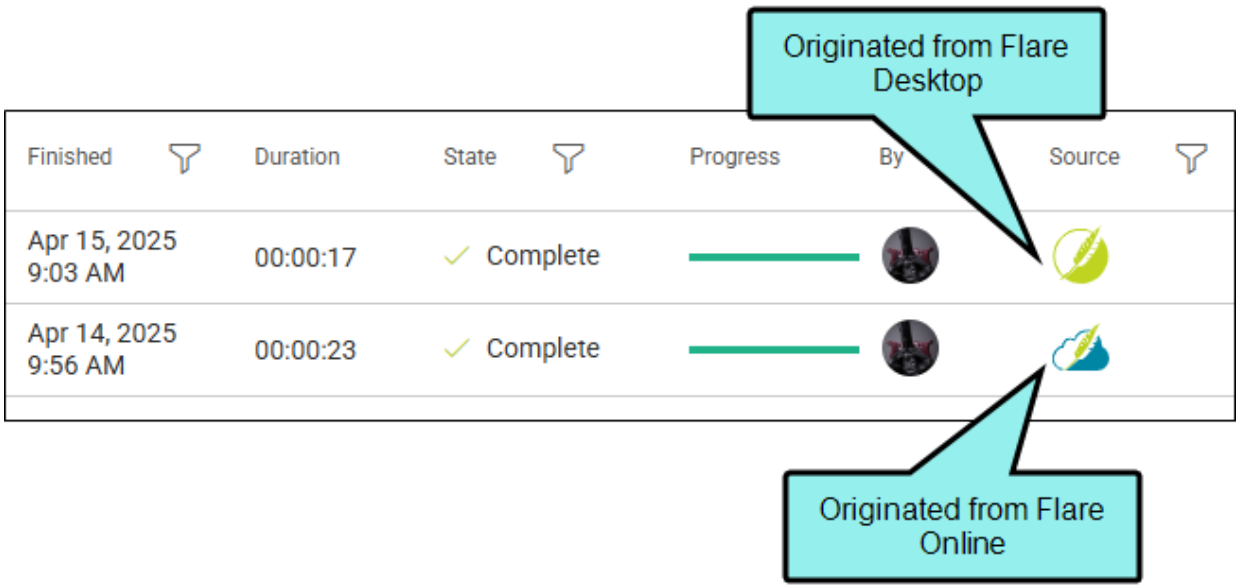


> NOTE This destination is automatically shown on the tab if the project is bound to Flare Online. If it is not bound to Flare Online, you will not see this destination.

5. Click to save your work.
6. At the top of the editor, click **Build**.

7. When the build finishes successfully, click **Publish**.

   After the target publishes, you can see the result in Flare Online. A Flare Desktop icon displays next to builds that originated from Flare Desktop. A Flare Online icon displays next to builds that originated from Flare Online. Also, if you had a particular Git branch selected when publishing, it will be shown in the Branch column of the grid.



> **NOTE** After the project is bound to Flare Online (along with any targets you plan to publish), it is not technically necessary to synchronize changes with Flare Online to have the latest files included in a build that is initiated locally. However, you would need to continue synchronizing in order to see the latest files in Flare Online when using other features (e.g., checklists, builds initiated from Flare Online).

Viewing Output

If you are associated with a project, you can view the generated output for a target.

Permission Required?

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



How to View Output

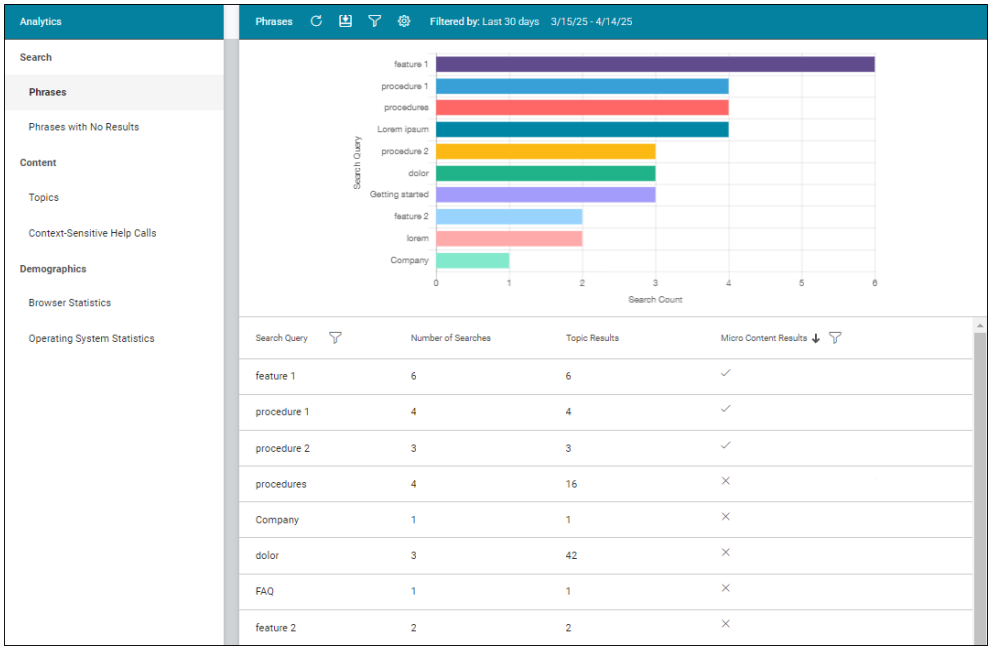
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the grid, click  to the left of the build you want to view. From the menu select **View Output**.

What's Noteworthy?

> NOTE Only some output formats can be viewed immediately from Flare Online (see "Flare Desktop Features Not Supported in MadCap Flare Online" on page 50). If you generate an output format that cannot be viewed, you can download it to your computer, where you can view it (see "Downloading Builds" on page 48).

Using Analytics

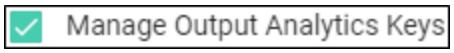
The Analytics page lets you view user activity on published HTML5 output. This includes search phrases used, search phrases with no results, topics viewed, context-sensitive Help calls, and demographic statistics (browsers and operating systems).



For more details and steps, see the *Analytics User Guide*.

Permission Required?

To create and manage keys, you must have the following permission setting:



However, all users on the license can view analytics data, regardless of their permission settings.

> NOTE If the project *is not bound to Flare Online*, you can view the analytics information on any Flare Online license where you are using the analytics key. However, if the project *is bound to Flare Online*, you can view its analytics only on the Flare Online license where the project is uploaded.

Deleting Builds

If you generate builds that you do not plan to keep or publish, you can delete them. This frees up space on the system.

Permission Required?

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



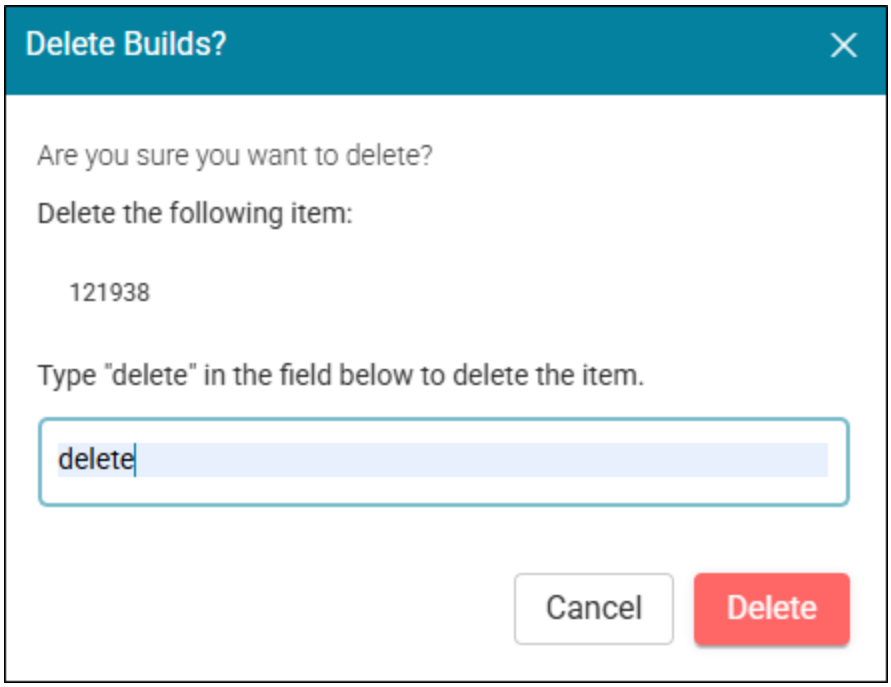
How to Delete Builds

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the **Builds** grid, click the check box to the left of each build you want to delete. Or click the top check box to select all builds.

   > NOTE You cannot delete builds that are set to “keep" or associated with a site.

4. In the toolbar, click .

5. In the dialog, type `delete` in the field under the listed builds.



6. Click **Delete**.

> NOTE You can also delete a build from the Build Profile dialog. See "Opening the Build Profile Dialog" on page 30.

CHAPTER 3

Other Activities and Information for Builds

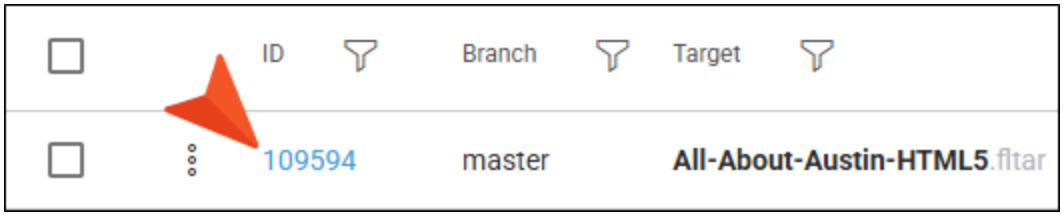
In addition to the main activities, there are some other tasks you might perform regarding this feature.

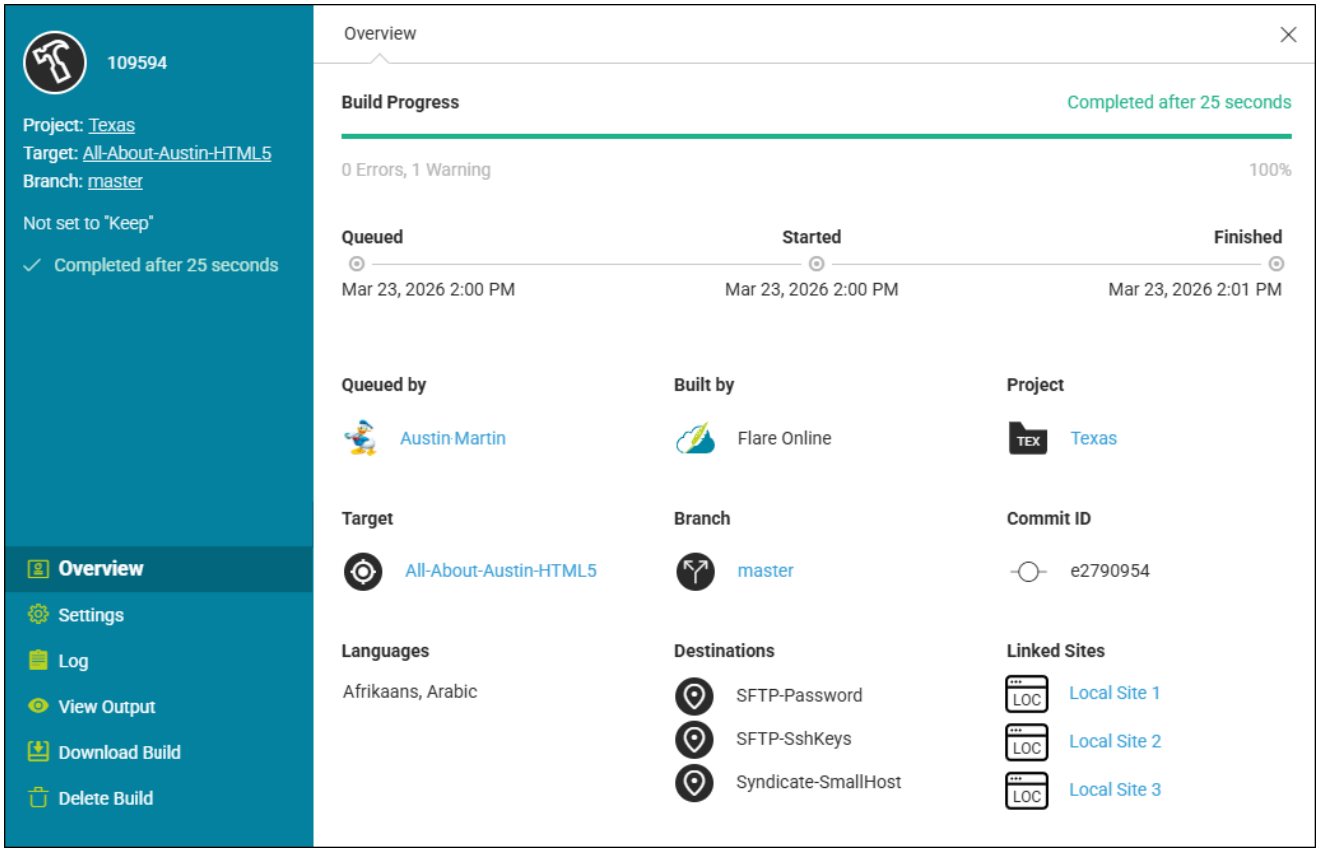
This chapter discusses the following:

Opening the Build Profile Dialog 30
Setting Builds as Keep 34
Using Private URLs 36
Opening the Build Log 39
Downloading Builds 48
Setting Notifications for Builds 49
Flare Desktop Features Not Supported in MadCap Flare Online 50

Opening the Build Profile Dialog

On the Output page, a column displays an auto-generated ID for each build. When you click this ID, the Build Profile dialog opens showing detailed information about a particular build.

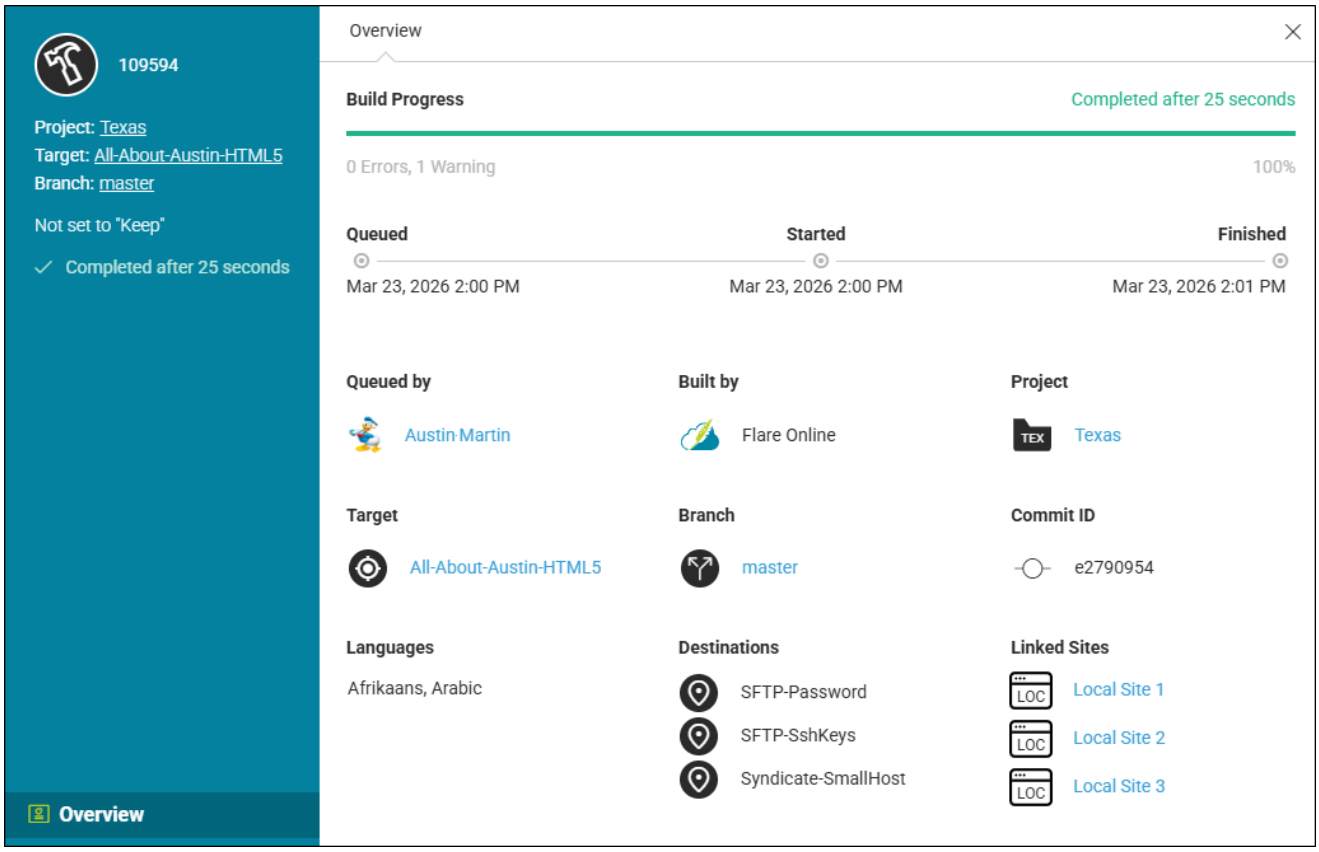




Permission Required?

To open the project in Flare Online and access the Build Profile dialog, you must be associated with the project. However, depending on your permissions, you might see different section links on the left side of the dialog.

If you do not have any permissions for builds, the dialog will look like this (with only the Overview section):



Sections

Following are the possible sections that you might see. You can use these sections to view different information and perform various activities (as an alternative to using toolbar buttons above the Builds grid).

- Overview Displays the following information:
  - Build timeline and progress, including its level of success
  - Individual who generated it
  - Project
  - Target
  - Branch
  - Commit ID
  - Languages
  - Destinations
  - Linked sites

- Settings
  - Add a project description. If used and selected, it displays in the grid and profile.
  - Lets you mark successful builds as "keep," or remove this setting. You might set a build to "keep" to avoid accidentally deleting it, perhaps with the intention of rolling back to it at some point (i.e., setting the site associated with that build to "live"). You cannot change a build's "keep" state while it is linked to a "live" site.
  - A warning displays if a build does not support case-insensitive paths. This only shows for older builds, as all newer builds support different combinations of case matchings in file paths. To add case-insensitive paths support, create a new build.
- Log Displays the log detailing info, events (messages), warnings, and errors for the build. The log area includes a Log tab, Grid tab, Download, Find, and Settings button. The Log view shows all the running information about the build, and you can optionally customize the interface with basic settings. The Grid view lets you to filter the log. You can also download the log (.mclog) file to your computer and open it in a text editor (e.g., Notepad++).
- View Output Opens the output for the build.
- Download Build Downloads the output files for the build into a ZIP file.
- Delete Build Lets you remove the build from the grid permanently. You cannot delete builds that are set to "keep" or associated with a site.

Setting Builds as Keep

You can mark successful builds as “keep.” You might do this to avoid accidentally deleting it, perhaps with the intention of rolling back to it at some point (i.e., setting the site associated with that build to “live”).

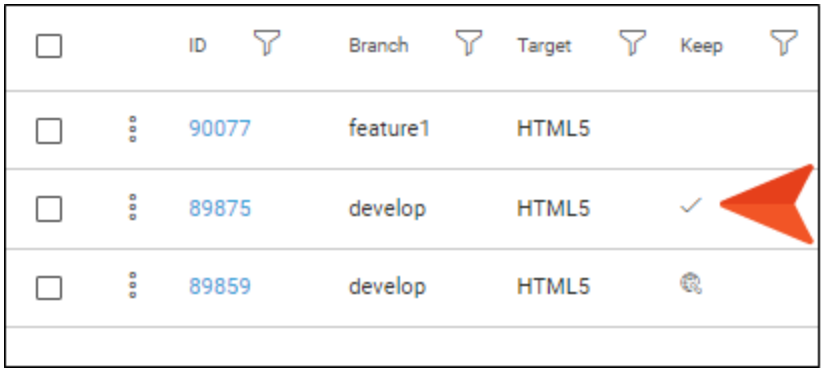
Permission Required?

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



How to Set a Build as Keep

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the grid, click the three dots to the left of the build that you want to set to "keep."
4. From the menu select **Toggle Keep**.
5. In the confirmation dialog, click **OK**. An icon is shown next to the build.



What's Noteworthy?

> NOTE To remove the "keep" status of a build, select the **Toggle Keep** option again.

Using Private URLs

For each build that you produce, a private URL is generated. This URL is useful for easily sharing generated output with individuals in your organization (e.g., for reviews and knowledge transfer). Only users registered as authors on your Flare Online license can access this URL.

Private URLs are not to be confused with private outputs.

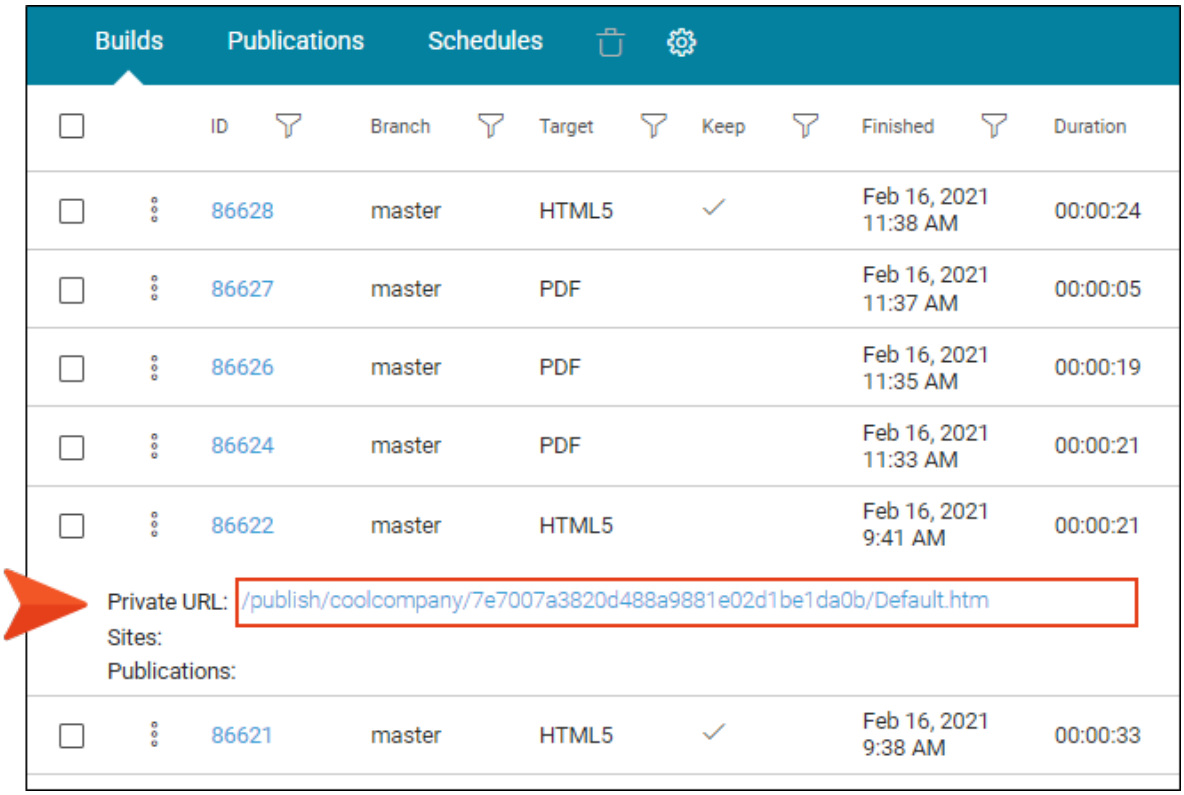
- Private URLs Only users with an author seat can view a private URL.
- Private Output Users do not always need to have a paid seat in Flare Online (depending on whether you set the site as "live"). On a site that is both live and private, users can simply be customers of your company using the viewer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

Permission Required?

No special permission is required for this activity. All authors who are associated with the project are allowed.

How to Use a Private URL

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the Builds grid, click the build row (not the check box) that has the private URL you want to retrieve. The row expands, showing additional details.
4. From the **Private URL** field, copy the URL.



5. Provide this URL to authors on your Flare Online license.

TIP If you create a site and set a site vanity, you can select the project and target for the output that you want to make available to other Flare Online users privately. When doing this, select to use the **Latest Build** instead of a specific build.

The site vanity can be used in place of the auto-generated ID that is normally part of a private URL. Anyone referencing your private URL will always see the most recent build for that target, instead of having to use a different private URL each time you generate a new build.

For example, you might have a private URL for a build, and the end of that URL looks something like this:

…/fictionsoft/cfb33266bffa45048d636878f00b1317/Default.htm

If you have a site vanity called "module1," you could replace the auto-generated ID in the private URL. That way, you could give others a URL that looks more like this:

…/fictionsoft/module1/Default.htm

If anyone uses this second URL that contains the site vanity, the most recent build in the target will always open in the browser.

NOTE If a particular site is set as "live," users do not need to be logged in to Flare Online in order to view the associated build's private URL.

Opening the Build Log

When you build (or publish) a target, a log is automatically created. Flare Online features live-streaming logs, easy log viewing, and reliable messaging for troubleshooting issues. Build functionality prevents process notifications and the build queue from stacking up, and the output files and build log are retained for each build.

Permission Required?

To open the project in Flare Online and access the Build Profile dialog, you must be associated with the project. However, depending on your permissions, you might see different section links on the left side of the dialog.

To view generated output and download a log, you would need the following permission:



How to Open a Build Log

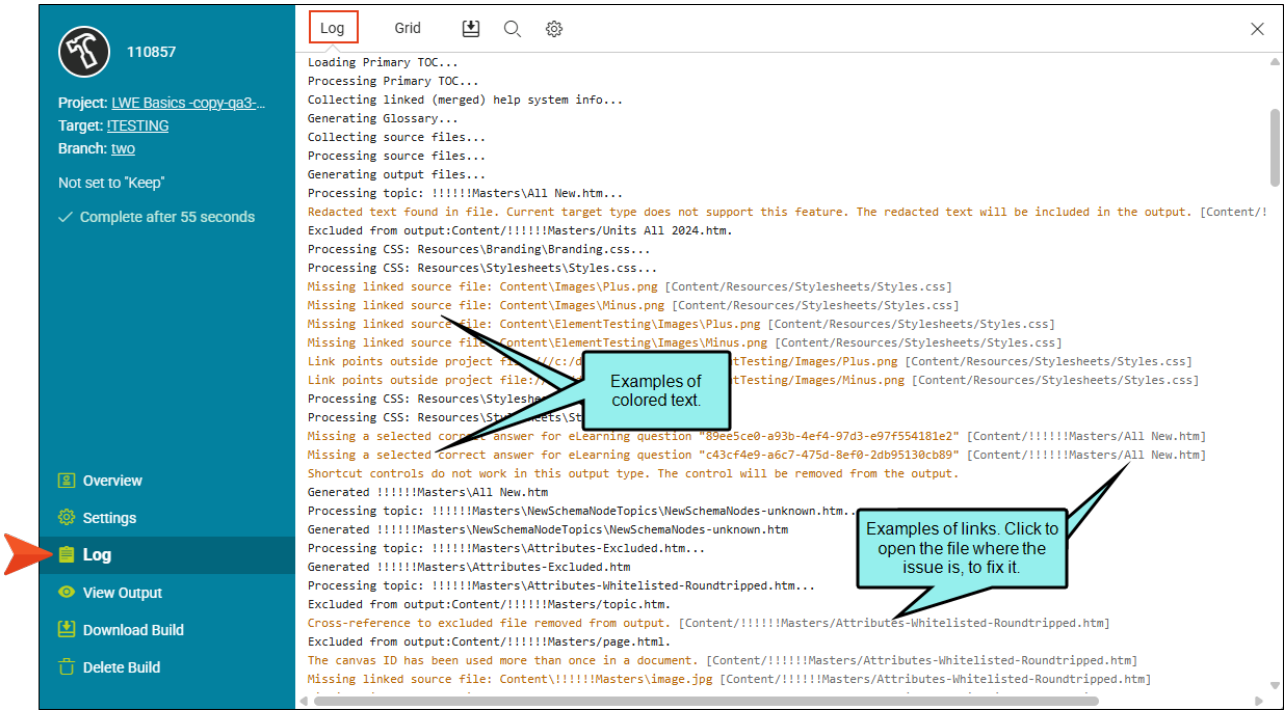
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the grid, click ⋮ to the left of the build with the log you want to view. From the drop-down menu select **View Log**. The Build Log dialog opens.

Viewing the Log File

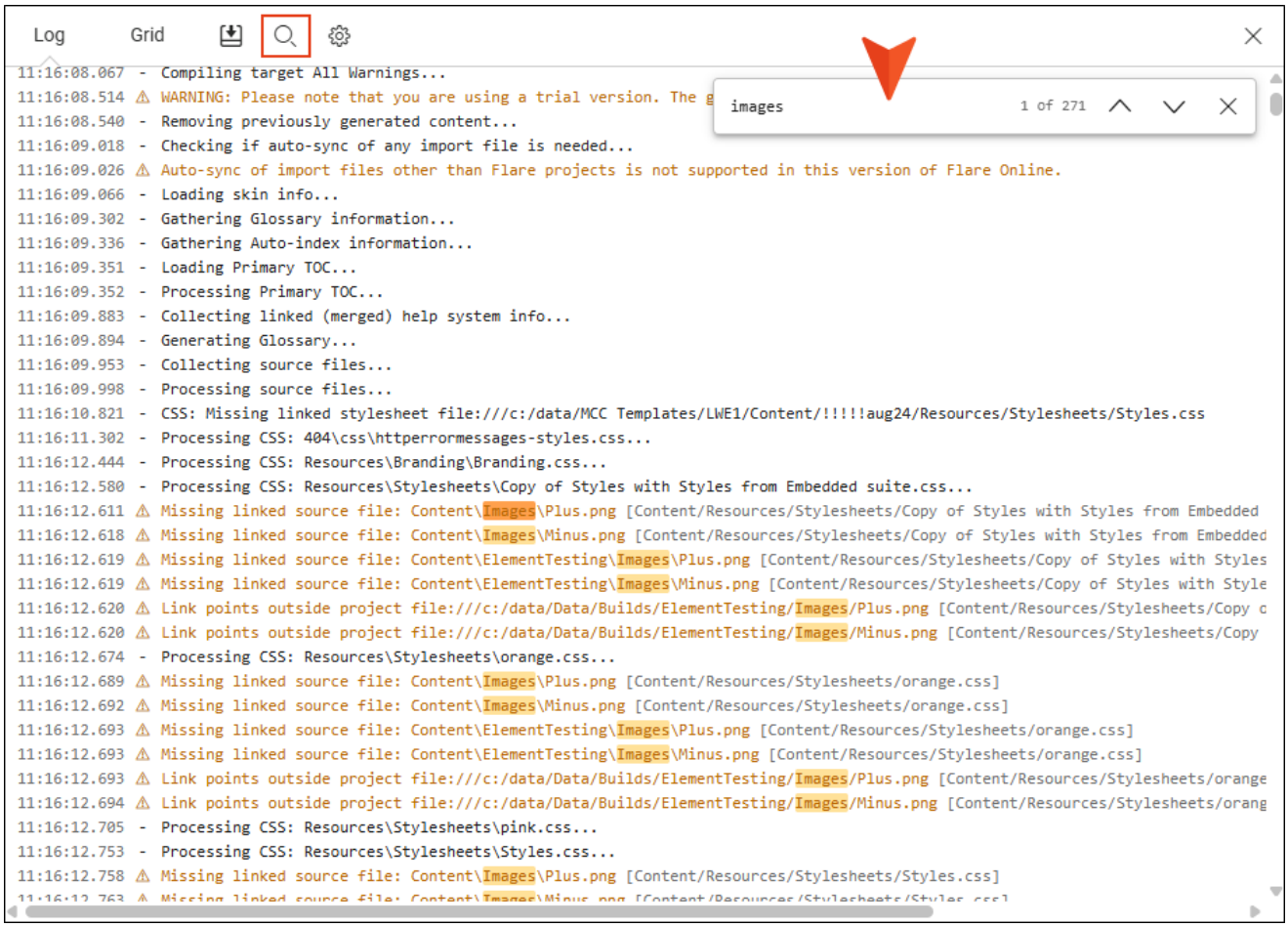
The log file notes log info, events (messages), warnings, and errors. The Log top menu includes Log tab, Grid tab, Download Log button, Find button (Log view only), or Settings button (Log view only). You can choose to see the file using the Log or Grid view, or click **Download Log** to view it in a text editor on your computer.

Log View

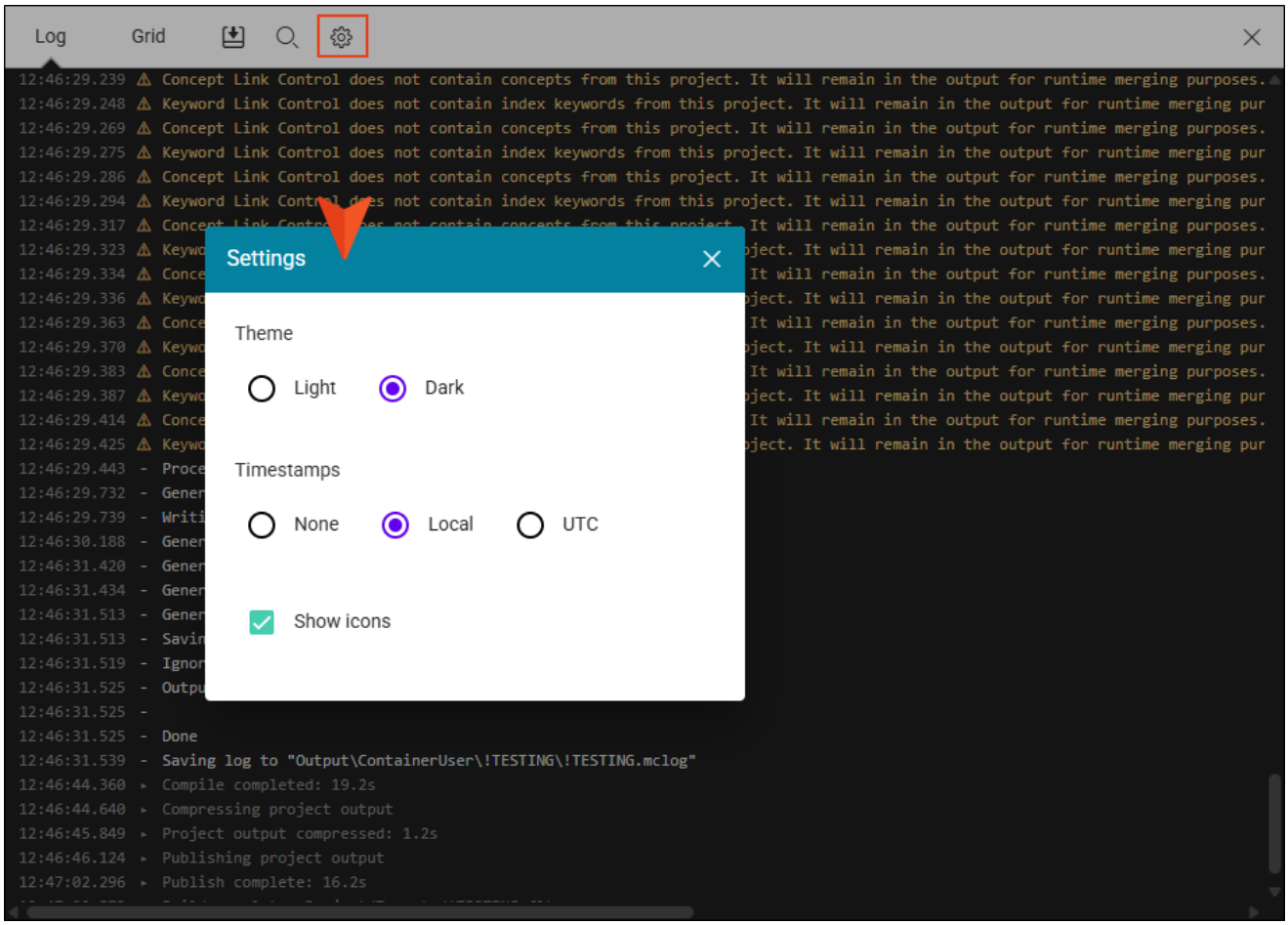
The Log view shows all the running information about the build process. Among regular line text, you might see line text in different colors to highlight information such as warnings and errors, or clickable links.



Click the **Find** button (or press CTRL+F) to quickly search the entire log file for a keyword. This is helpful to identify items in a big block of text. (Alternatively, you can download the log file and search for an item in a text editor.)



Click the **Settings** button to customize the interface with basic settings such as choosing a light or dark theme, timestamps, or showing icons.

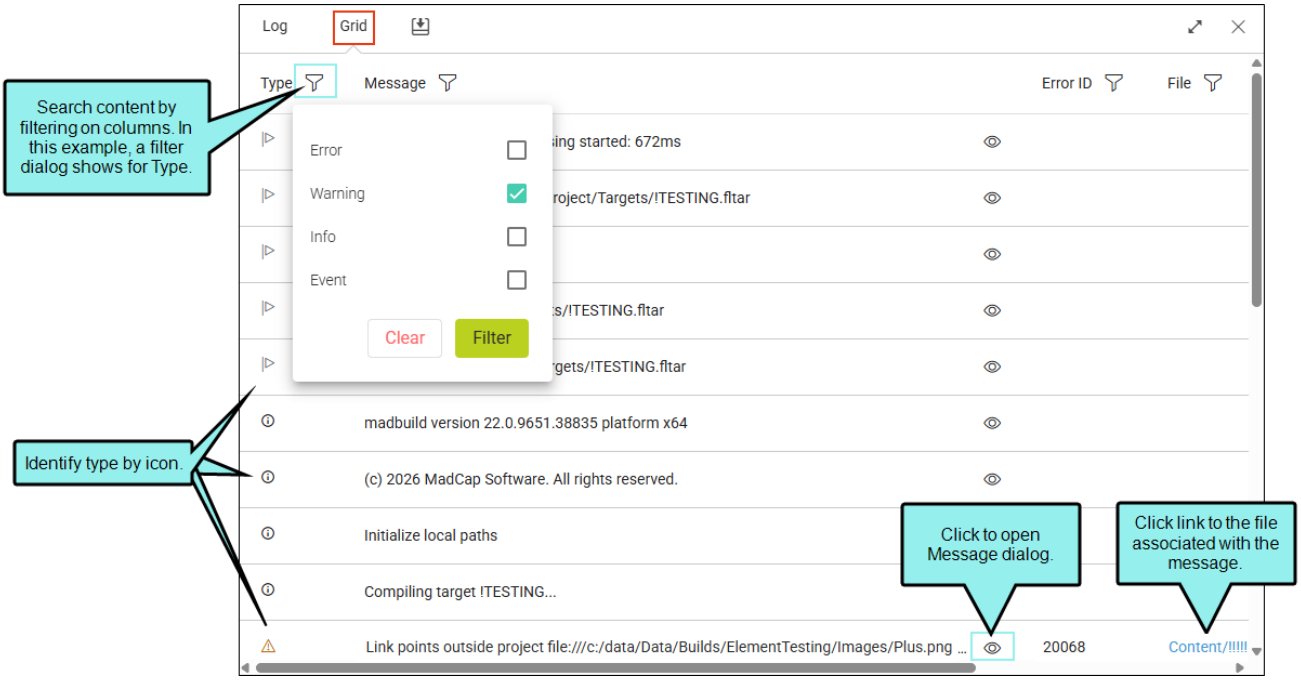


Grid View

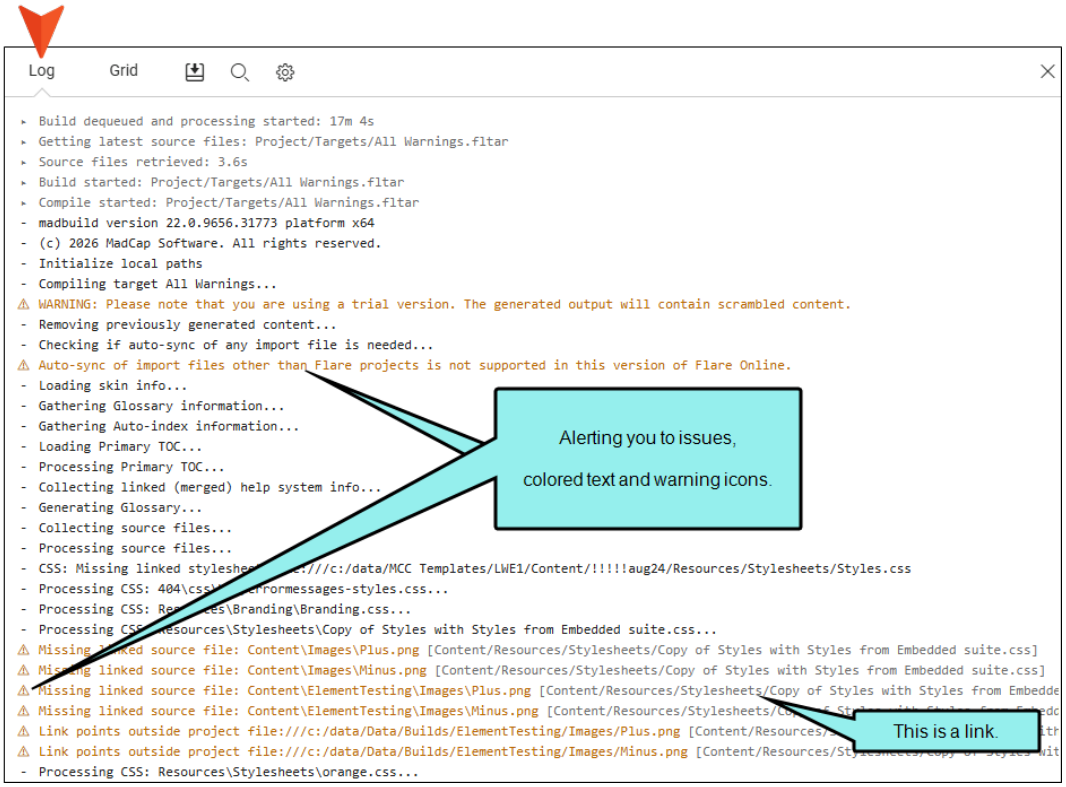
The Grid view allows you to filter the log to quickly find if there is anything wrong with the output. For example, you can filter on the following type:

- **Error** These cause the build not to compile completely.
- **Warning** Even though the build compiles correctly, a warning shows issues in the output that you need to fix (e.g., broken links, or missing images), or suggestions for improving your output (e.g., accessibility settings).
- **Info** These are high-level messages about the build as the output is generated.
- **Event** These are crucial milestones of the build.

Each column in the grid supports filtering. So, you can search for messages not only by type, but also by the message itself, error ID, file, or subsystem.

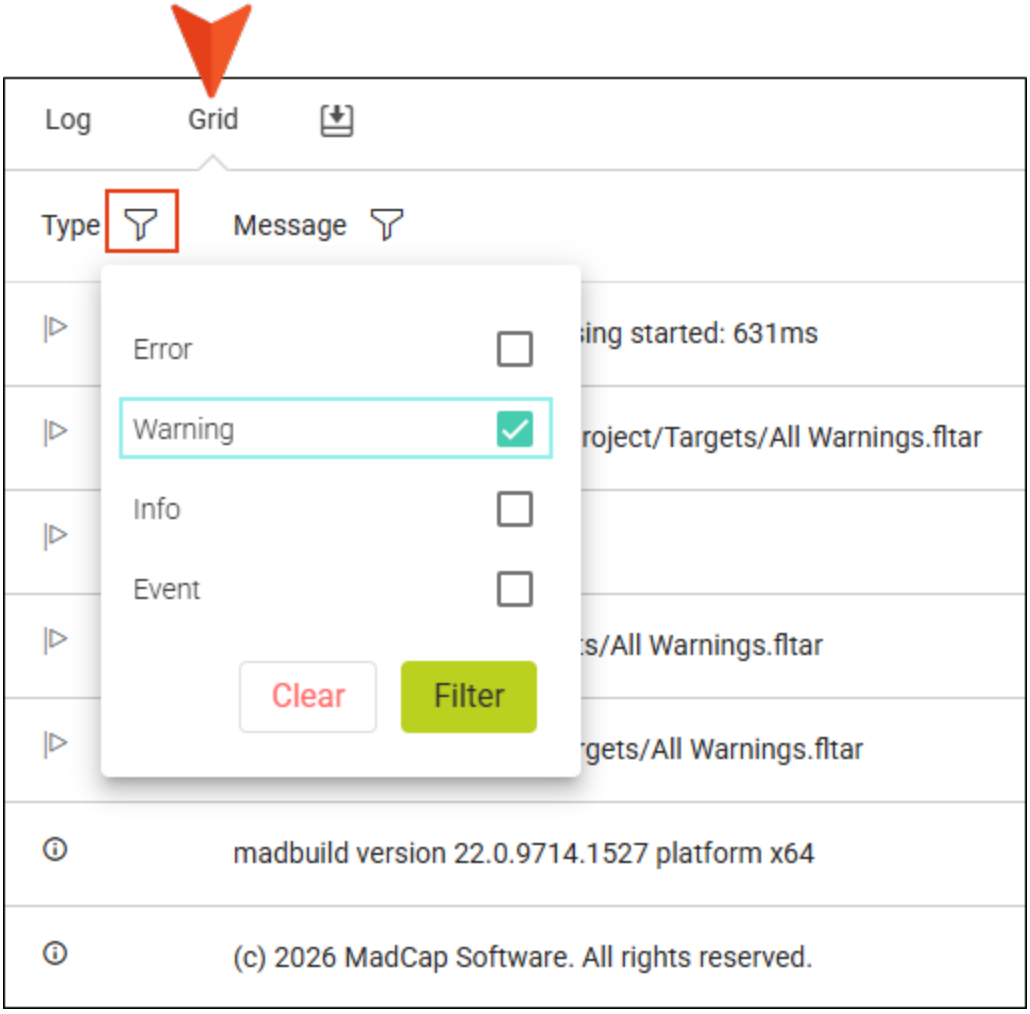


☆ EXAMPLE You build output for your project, and you decide to open the log file. As you scroll through the Log view, you notice colored text and icons (this can indicate issues with a build).

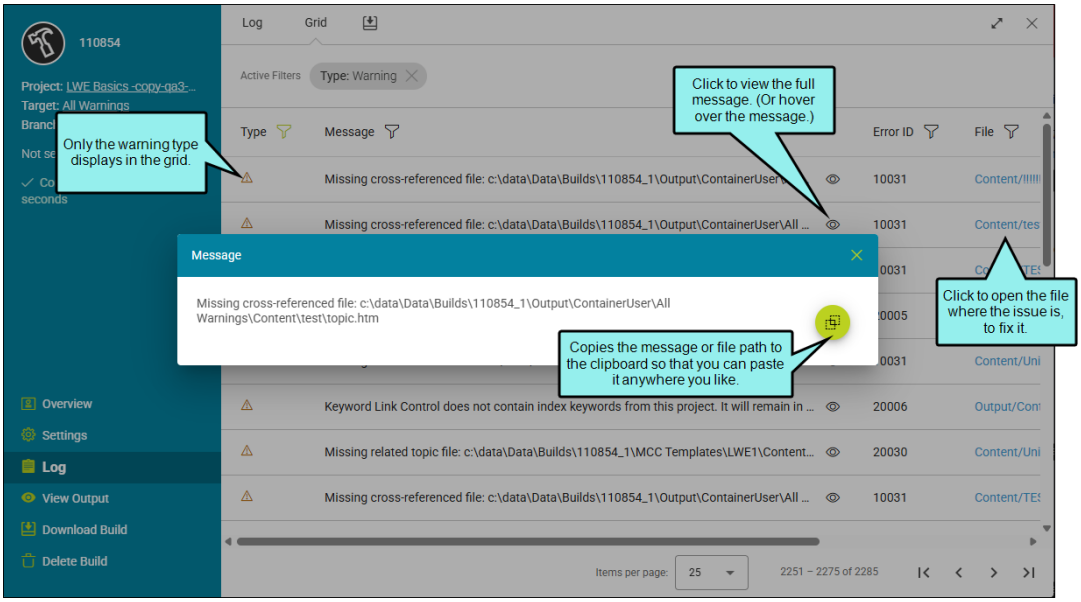


Notice some messages provide a link for you to click. The links conveniently take you directly to where the issue is, to troubleshoot and fix in the project.

You are interested in tracking down warning items. So you decide to switch to the Grid view. You first click the Filter icon, and select the Warning type.



You click through the warning messages. From here you can troubleshoot issues and do your best to fix problems with the build. In this case, you focus on a warning telling you that a topic is missing a cross-referenced file.



What's Noteworthy?

IMPORTANT Use caution when ignoring compiler warnings. Only ignore warnings that you are certain you do not need to receive.

NOTE If you do not want to see a particular warning in a future build, you can ignore warnings when you generate a target using Flare Desktop. This is done in the Options dialog, or in the Target Editor. Then, you must push your changes to Flare Online.

NOTE The Download Log option saves the log (.mclog) file to your computer. You can then open it in a text editor such as Notepad++.

NOTE To find an item in the Grid view, click CTRL+F. If you type a keyword, it locates instances of it in the appearing pane only.

Downloading Builds

After generating a target, you can download the output to your computer. This is an optional step, in case you want to have a local copy of the build (e.g., you want to view your Microsoft HTML Help output, which is an output format that you cannot view from Flare Online).

Permission Required?

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



How to Download a Build

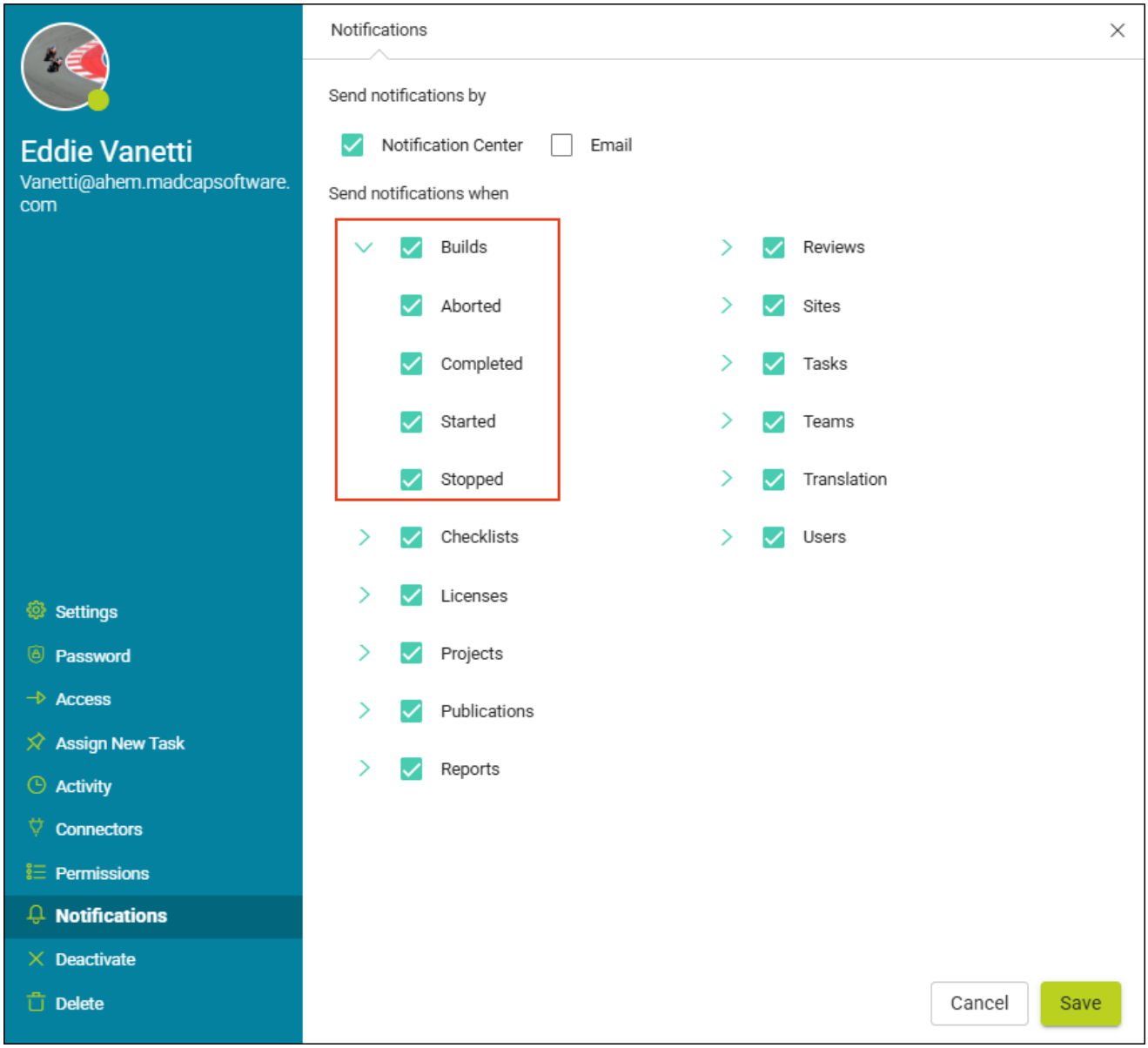
1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the grid, click  to the left of the build that you want to download.
4. From the menu select **Download**. The output files are placed in a numbered zip file and downloaded to your Downloads folder.

> NOTE Due to issues with Microsoft HTML Help, the CHM file that is downloaded will initially be blocked. To unblock the CHM file, remove it from the ZIP file. Then right-click the CHM file and select **Properties**. On the **General** tab in the dialog, select **Unblock**.

> NOTE If you attempt to open a build and Flare Online cannot open the file in the web browser (e.g. a CHM file), Flare Online will download the file.

Setting Notifications for Builds

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.



Flare Desktop Features Not Supported in MadCap Flare Online

There are certain features in Flare Desktop that are not fully supported when you generate targets from MadCap Flare Online. However, a few of these features are supported when publishing directly from a local project in Flare Desktop up to Flare Online. See "Publishing Directly to Flare Online" on page 22.

Automatically Get Latest Files

If you are working in a dual-bound scenario and you select the option in the target to automatically get the latest version of files before generating, this option will not work when you build from Flare Online. Instead, you must first synchronize your files with source control in Flare Desktop and then push those changes to Flare Online.

Batch Targets

Batch targets cannot be generated from MadCap Flare Online.

However, you can generate a batch target when publishing directly to Flare Online from a local project in Flare Desktop.

Custom Build Log Folder

In the Options dialog, Flare Desktop has a feature that lets you choose a custom folder to hold the log file after generating output. This feature is not supported when building from Flare Online. Instead, the log file is stored at the root level of the output folder.

Custom Fonts

If you are using custom fonts in your project locally in Flare Desktop, they are not supported when you build output from Flare Online.

Custom Output Folder

In a local project in Flare Desktop, targets let you choose a custom location for your output folder. However, this is not supported when building from Flare Online. You must use the default location.

Date/Time Variables

Target generation occurs on a server with Flare Online, so date/time variables are not supported.

Elasticsearch

Elasticsearch is one of the search engine options that you have in a local project in Flare Desktop (along with MadCap Search and Google Search). Currently, using Elasticsearch in your HTML5 output is not supported in targets generated from Flare Online.

However, Elasticsearch is supported when publishing directly to Flare Online from a local project in Flare Desktop.

Global Ignored Warnings

You can tell a local Flare project to ignore certain warnings so that they do not display as such in the Builds window pane when generating output. This can be done globally for all targets in all projects. You can also override those global settings for a specific target in a project. However, if you generate output from Flare Online, global settings to ignore warnings are not supported; instead, you must ignore warnings in the target.

Linked Mimic Movies and Projects

When building from Flare Online, external links to Mimic movies and projects will not work. However, embedded movies in a local project in Flare Desktop are supported.

MadCap Pulse

MadCap Pulse is not supported in output that is generated from Flare Online. In order to use Pulse with your output, it must be hosted outside of Flare Online.

Pre- and Post-Build Events

If you create pre- or post-build events in your local Flare target, they will not function when building from MadCap Flare Online.

However, pre- and post-build events are supported when publishing directly to Flare Online from a local project in Flare Desktop.

Viewing Some Output Formats

The following types of output can be generated from MadCap Flare Online, but they cannot be viewed (output files are downloaded to your computer):

- Clean XHTML
- DITA
- Eclipse Help
- EPUB
- Microsoft HTML Help

  > NOTE Due to issues with Microsoft HTML Help, the CHM file that is downloaded will initially be blocked. To unblock the CHM file, remove it from the ZIP file. Then right-click the CHM file and select **Properties**. On the **General** tab in the dialog, select **Unblock**.

- Microsoft PowerPoint
- Microsoft Word
- Server-Based Outputs:
  - HTML5 Plus
  - WebHelp Plus

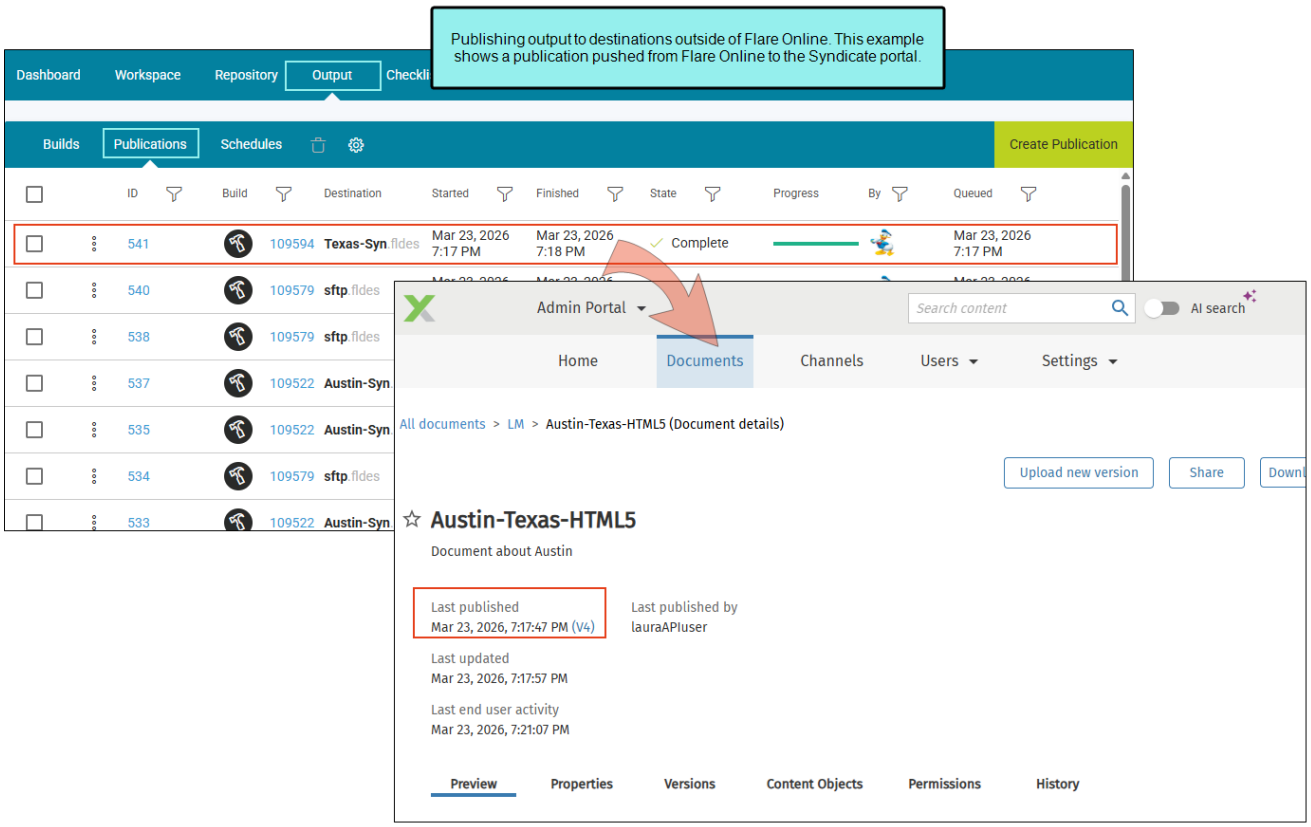
  > NOTE If you want to produce server-based output from MadCap Flare Online, you will need to download the output from Flare Online after it finishes building. You can then publish the output to your server.

CHAPTER 4

Publications

You can publish output to locations outside of Flare Online. You can use Flare Online to host your content if you choose to do so, but this feature gives you the option to publish output to Syndicate (i.e., MadCap's Enterprise Content Delivery Platform) or to a remote server via SFTP.

If you decide to publish to an external location (i.e., destination) you can still use Flare Online to create and manage your content. For example, you might use Flare Online to author your project's content and employ its hosting capabilities as a sandbox for testing before publishing your output externally to a live production server.



General Information

- "What is Publishing?" on the next page
- "What is a Connector?" on page 57
- "Before You Start Publications" on page 58
- "Why Use Syndicate?" on page 59

Main Activities

- "Creating Connectors" on page 63
- "Adding Destinations" on page 68
- "Editing Destinations" on page 71
- "Creating Publications" on page 75
- "Deleting Publications" on page 82

General Information for Publications

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

What is Publishing?

Publishing is simply sending a copy of your output to another location. You can publish to external destinations, but the original files are still in Flare Online. This happens after you have created a project, added content, and developed a target. Then you can build and publish the output (i.e., the final publication).

Flare Online supports publishing to the following:

- Syndicate MadCap Syndicate is enterprise-grade software that provides end-to-end digital content delivery across the web, devices, and online channels. This content delivery platform helps your organization develop, manage, and share secure digital content with teams worldwide.

  > NOTE If you are interested in learning more about Syndicate, contact MadCap Sales. They can provide information about the product, demos, review purchase options, and set up Syndicate accounts.

- SFTP Stands for Secure or SSH File Transfer Protocol, and offers a high-level of security for file transfers between a client and server.

What is a Connector?

A connector is the most important concept in the publishing process, because without it you cannot connect to an external location. A new connector basically requires credentials to access the outside server you are connecting to, such as login, authentication, and connector URL (host name).

A huge benefit in using Flare Online for publishing, is that *once a connection is established to a Syndicate or SFTP host name, any destination linked to the same host name can use it without having to re-enter credentials*. This pertains to both license-level and user-level connectors because you can have multiple destinations that use the same connector.

> NOTE If you are familiar with publishing in Flare Desktop, entering credentials for a single destination and the destination file path are solely in its Destination Editor. Since Flare Online is cloud-based, the license-wide credentials and the destination file path are separate, and so you work with a Connector page, and a Destination Editor.

Before You Start Publications

For Flare Online to push data to other systems, there are some considerations in order to establish outside connections. Your organization's administrator can help you with this set up.

Syndicate

You need to have Syndicate (which includes Elevate) with a Platform Login that gives you access to both applications.

A user (i.e., API user or standard user) needs to be part of the "Syndicate" role. Then in Elevate, the appropriate permissions need to be given for users to access Syndicate groups and folders, and to generate the Client ID and API key that is needed for the publications feature. Note that a standard user with Administrator privileges can generate API keys in the user profile settings in Elevate.

The URLs and credentials generated are all necessary to enter into the Flare Online connector for Syndicate authentication.

> NOTE Syndicate and Elevate are part of the MadCap Software family of products. This documentation assumes you have a Syndicate account and a working knowledge of the portal. For more information refer to Syndicate documentation.

SFTP

Your administrator can provide you with details pertaining to the remote server or the computer where you want to publish output.

Why Use Syndicate?

Syndicate provides a governed, AI-ready knowledge platform enabling RAG, semantic search, and intelligent content delivery across internal and public portals for learning systems and technical documentation.

Syndicate and AI

MadCap Syndicate is enterprise-grade software that provides content delivery to help your organization develop, manage, and share secure digital content with teams worldwide.

Think about content as data. Syndicate offers a way to manage and organize all your content with AI-enabled features. Authoring in Flare and publishing to Syndicate promotes structuring your content with classifications and custom attributes for accurate search results. You can review data analytics from the AI-enabled search to identify if content is being consumed, the patterns and needs of users, or if there are any gaps in the content. Pinpointing data in this way connects people with the information they need.

Syndicate Portals

Syndicate is a web application, and a portal is hosted by Syndicate behind an authentication layer where you can share a document privately or publicly. For example, a company would have a unique tenant URL where users would access the portal.

A portal is a scope of content that you have complete control over, including the display look and feel and a cohesive but flexible “single experience” delivery. It serves as a central place that consolidates different documents that you specify and can surface content dynamically. An example of managing content is to restrict public access and turn off public search engine indexing for each portal. The Syndicate portal has a baked-in AI search. The results shared for AI search are specific to a certain portal, and you can filter your results in multiple ways.

RAG

The retrieval-augmented generation (RAG) component is separate from the portal feature. RAG allows you to include data associated with your Syndicate tenant to use with your large language model (LLM) of choice (e.g., CoPilot). The RAG technique is responsible for 1) retrieving the results (e.g., proprietary information) semantically from Syndicate or any other database via search APIs, and 2) generating a response through optimizing the output of LLM, but you control the configuration of how it generates an answer.

Syndicate Hosting Features

The following is a list of Syndicate hosting features that may interest technical communicators.

Hosting Feature	Description
Access to outputs	Syndicate is a content delivery system. Each document (e.g., eLearning, video, PDF, HTML) can have one or more URLs associated with it. Content can be syndicated out via shared links (public or private) to other places such as LMSs, web applications, internal help desks; and from there provide direct access.
Analytics	Syndicate analytics centers on tracking user interactions with content. It can track how users consume content such as individual topics or videos. For eLearning it can manage millions of records in its built-in learning record store (LRS).
Content delivery network (CDN)	Syndicate uses a global network of interconnected servers that speeds up loading data to end users.
Custom domain	Syndicate supports domain white labeling which enables you to present your organization on a branded, customized URL.
Faceted searches with taxonomies	Syndicate can perform content search through a predefined set of attributes such as resource type, format, language, etc. It also offers a customizable taxonomy that can enhance a search. This is primarily useful internally within Syndicate.
Federated searches	A federated search lets you search for content across multiple data sources (in this case, different outputs uploaded to Syndicate). You can search for content in the Syndicate portal directly, but this only looks at documents residing in Syndicate. Therefore, it is primarily useful for internal purposes. However, the entire search experience can be externalized to a third-party application via an integration leveraging Syndicate's expansive application programming interface (API) library.

Hosting Feature	Description
Headless Content via API Shared Integrations	With Syndicate, you can use application programming interface (API) shared integrations to extract specific pieces of content from your output uploaded to Syndicate. These extracted content objects can then be displayed in other applications or services that your company uses, essentially producing headless content.
Multi-Channel eLearning Management	eLearning packages (compliant with SCORM and xAPI) that originate from Flare Desktop can be published to Syndicate. In Syndicate you can manage eLearning thin packages with learning record store (LRS) functionality.
Permissions	Access to content in Syndicate can be controlled at the folder and document levels using a group-based permission model.
Single sign-on (SSO)	Syndicate supports user login with SSO and can work with more than one identity provider (IdP), including authentication access for non-SSO users.
Schedule activation dates	Syndicate can activate and deactivate documents to make them either accessible or not accessible. You can enable or disable shared links to the document's content through the activation (and deactivation) dates.
Versioning	Syndicate tracks version histories of a document which facilitates compliance and audits. Versions are established when a document is replaced with a newer uploaded document or republished in the same folder and output profile.

Main Activities for Publications

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

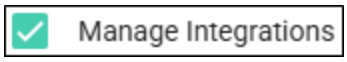
Creating Connectors

You can create a connector at the license level or at the user level.

- License level Set up a connection where all users on your license can use it. In other words, all publications are done with the configuration of that connector.
- User level Set up a connection for each user. This is useful if you want each user to publish, or if different users have different access levels at the publishing destination.

Permission Required?

For this activity, you must have the following permission to control and allow access to external servers:



A user with Administrator rights is expected to have the Manage Integrations permission to integrate a connector with a Flare Online license.

For this activity, you must have the following permission:



Users associated with a project only need the Publish Builds permission for publishing output.

How to Create a Connector

1. Do one of the following:
   - *For a license-level connector*
     a. In the upper-right of Flare Online, click your license avatar (or the first letter of your license if you haven't yet chosen an avatar image) and select **License Settings**.
     b. On the left, select **Integrations**.
     c. Select the **Connectors** tab (if it does not have focus).
     d. Click **New Connector**.
   - *For a user-level connector*
     a. In the upper-right of Flare Online, click your user avatar.
     b. On the left side of the profile, select **Connectors**.
     c. Click **New Connector**.
2. From **Type**, select **Syndicate** or **SFTP**. Depending on the connector type, the fields you see vary.

SYNDICATE

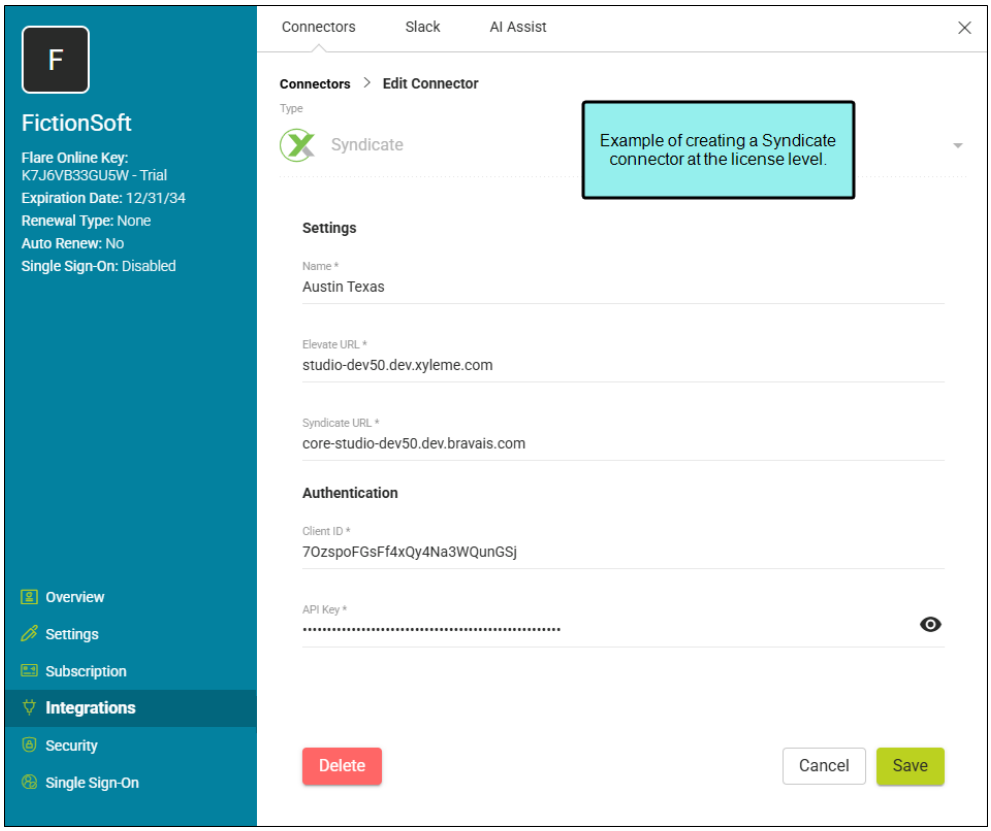
a. In the **Settings** area, do the following:
   i. **Name** Enter a name for the connector. It can be anything.
   ii. **Elevate URL** Enter the Elevate URL (e.g., studio-[customer].xyleme.com)
   iii. **Syndicate URL** Enter the Syndicate URL host name (e.g., core-[customer].bravais.com)

> **NOTE** It is the Delivery (CORe) API that is used to publish content to Syndicate. The base URL for the API call is https://core-[domain].bravais.com, where [domain] is the user's domain name. CORe stands for Core Object Repository, and bravais is the legacy name for Syndicate.

b. In the **Authentication** area, enter the following:

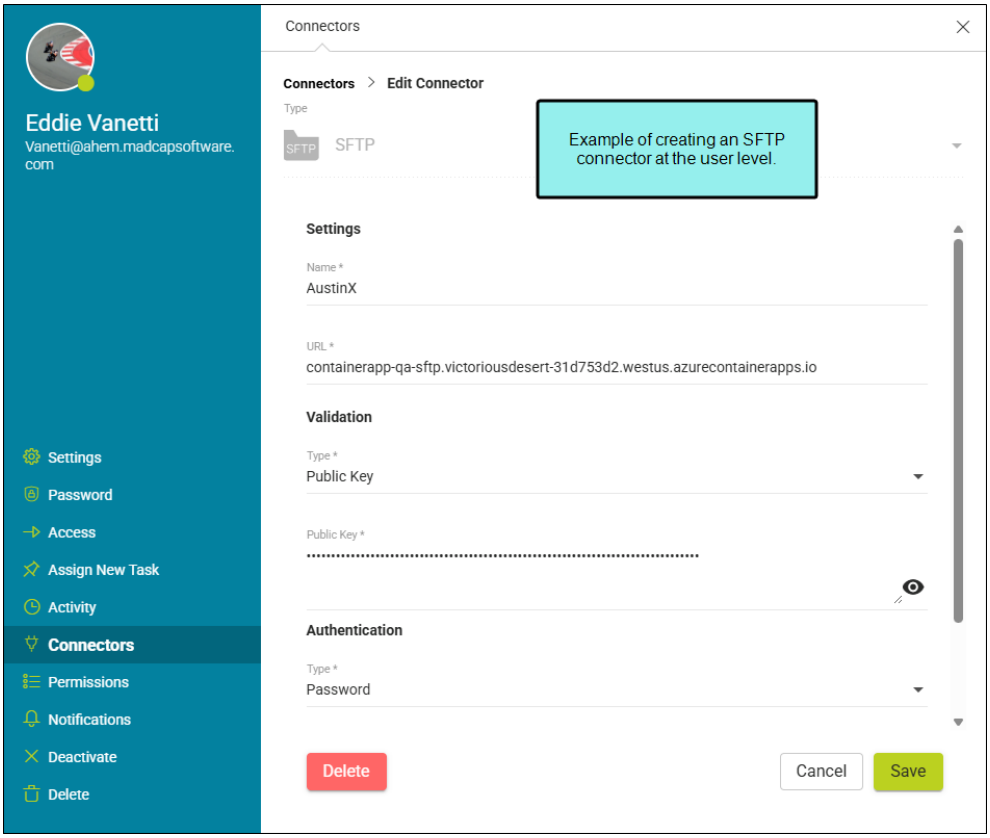
   i. **Client ID** Enter the Elevate-generated Client ID.

   ii. **API Key** Enter the Elevate-generated API Key.



SFTP

a. In the Settings area, enter the following:
    i. Name Enter a name for the connector. It can be anything.
    ii. URL Enter the host name of the remote server or the computer where you want to publish the output files.
b. In the Validation area, from Type select:
    - None Select this if there is no validation of the SFTP server.
    - Public Key Select this to validate the server against a public key.
c. In the Authentication area, from Type select:
    - Password Select this if the server connection is authenticated by the user name and password.
    - Private Key Select this if the server connection is validated against a public or private key pair match. You need to supply the private key and password for the server.



3. Click **Save**.

> **NOTE** Keep in mind that every connector URL is unique, and so you cannot have two pointing to the same location. However, if a connector exists in both levels, the user level wins.

> **NOTE** To edit a connector simply open it and update the information. If you need to delete a connector, open it and select the **Delete** button.

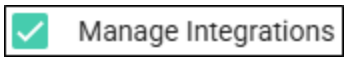
Adding Destinations

A destination defines the folder(s) and file path where you want your publication to go for whichever host (i.e., connector) you are using. You might have multiple destinations for different folder paths.

> NOTE Your project might already include a destination folder and file, especially if you imported a project into Flare Online from Flare Desktop that already had published output. You can find them in the Files area of the Workspace tab, under Project > Destinations. *However, if a destination is already in your project, you still must set up the connector.*

Permission Required?

For this activity, you must have the following permission to control and allow access to external servers:



A user with Administrator rights is expected to have the Manage Integrations permission to integrate a connector with a Flare Online license.

For this activity, you must have the following permission:

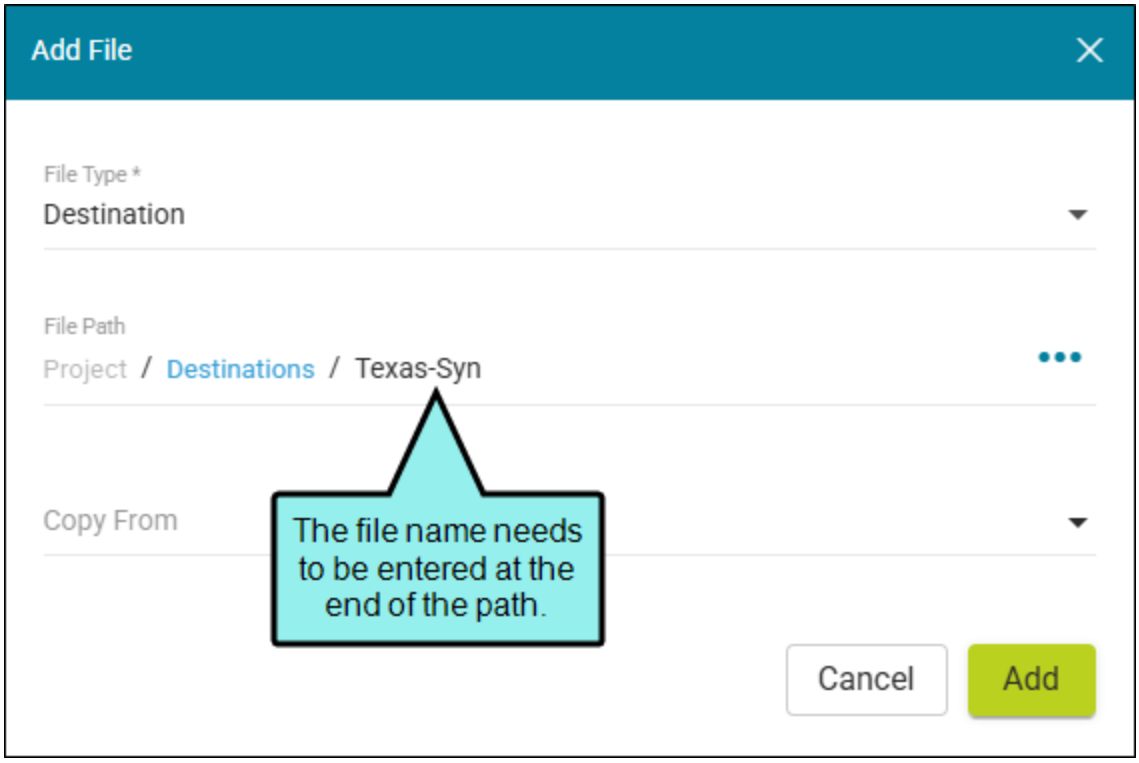


Users associated with a project only need the Publish Builds permission for publishing output.

How to Add a Destination

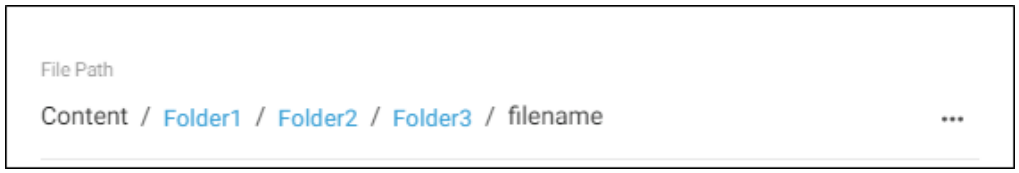
1. On the left side of the Flare Online interface, click **Projects**.
2. In the grid, click the name of the project associated with the license that includes the connector, and select the **Workspace** tab at the top.
3. Click .
4. In the Add File dialog, click the **File Type** drop-down, and select **Destination**.
5. In the **File Path** field, enter a path and a name for the new file.

> NOTE Alternatively, click ••• to select a location for the file in the project, and **Accept** the file path. Then in the **File Path** field, enter a name for the file.



NOTE You might notice the File Path displays black or blue lettering. The blue items are folders, and you can click the item to jump to that folder.

For example, in the Add File dialog, a file path contains several folders (indicated by blue lettering) before the filename.



If the "Folder1" item is clicked, you know longer see the subfolders.



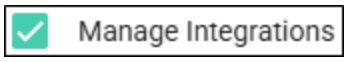
6. (Optional) In the Add File dialog, from the **Copy From** drop-down, you can select an existing destination file to use. This copies all the settings from the existing destination file to the new file, providing a base of settings to start with for your file.
7. Click **Add**. A new file is created and opens in the Destination Editor. You can edit the destination settings, or you can skip that for now and commit your changes.
8. Click **Commit**.
9. In the Create New Commit dialog, verify the new file path (and edit if necessary), and enter a **Commit Message**.
10. Click **Commit**. (Or click **Cancel**, to back out of the process.) The new destination file is added to the project.

Editing Destinations

Once you have a destinations file, you can edit it in the Destination Editor at any time.

Permission Required?

For this activity, you must have the following permission to control and allow access to external servers:



A user with Administrator rights is expected to have the Manage Integrations permission to integrate a connector with a Flare Online license.

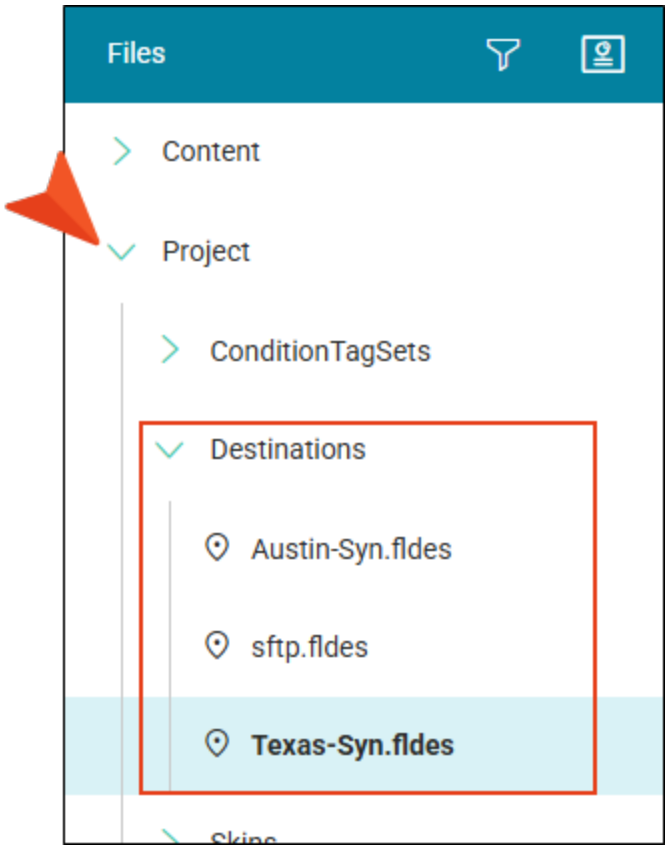
For this activity, you must have the following permission:



Users associated with a project only need the Publish Builds permission for publishing output.

How to Edit a Destination

1. From the **Projects** page (**Workspace** tab), open a destination.



> TIP From the left side of the page, you can also click to search for a specific file. If you right-click the destination, you can open it from the popup.

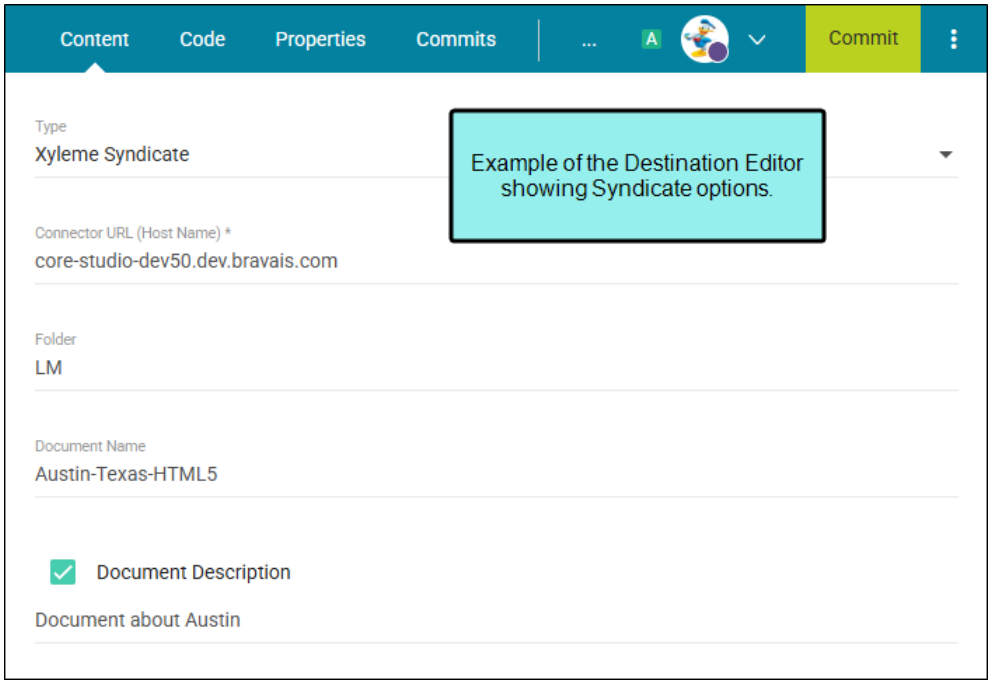
2. From the **Type** drop-down, select external location where you want your output to go.
3. Set the options.

SYNDICATE

- **Connector URL (Host Name)** Enter the Syndicate URL from your connector (e.g., core-[customer].bravais.com).
- **Folder** Enter the folder where you want the publication to go on your host.

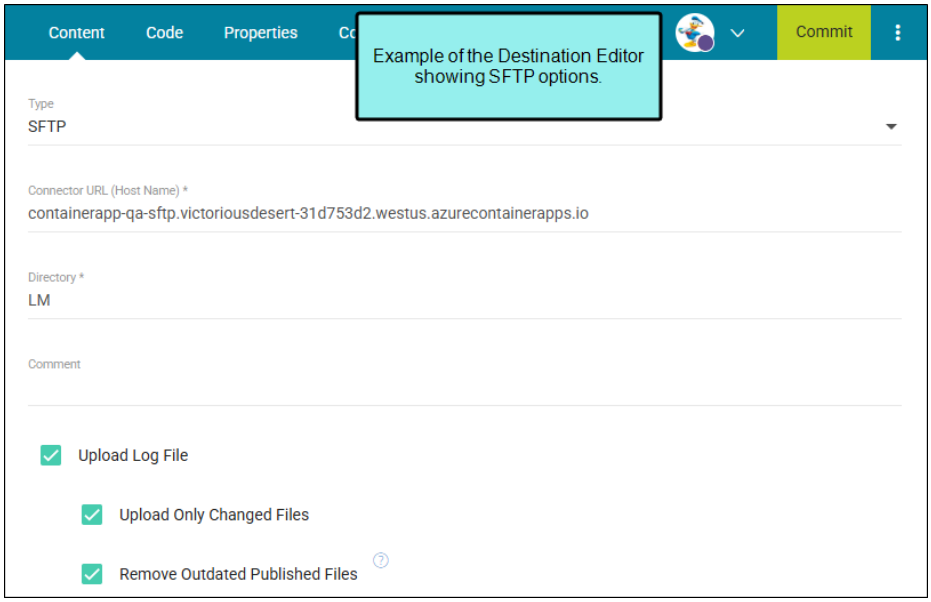
> **NOTE** On the Syndicate side, the API user or standard user needs to have access to the folder. If you want your publications to land in a specific folder in Syndicate's Admin Portal, you need to create one in the Documents area before you publish. If you publish with no folder specified, the output publishes, but is added at the end of existing folders.

- **Document Name** Enter a name for the publication (default, use target name).
- **Document Description** Add details about the publication (default, use target comment).



SFTP

- **Connector URL (Host Name)** Enter the host name of the remote server or computer for the output files.
- **Directory** Enter the folder path for output files to publish.
- **Comment** Provide a description of the destination so its purpose is clear.
- **Upload Log File** Select to define upload actions:
  - **Upload Only Changed Files** Republish only the files that have changed. This can save significant time.
  - **Remove Outdated Published Files** Identify files that were previously published to the destination but are no longer in the files to be published.



4. Click **Commit**.
5. In the Create New Commit dialog, verify the new file path (and edit if necessary), and enter a **Commit Message**.
6. Click **Commit**. (Or click **Cancel**, to back out of the process.)

> **NOTE** The Connector URL (Host Name) in the Destination file must match the URL in the Connector page. This enables Flare Online to match the host names behind the scenes so a destination and build know which connector to use.

Creating Publications

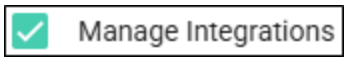
Building and publishing output are closely related in that a publication is an instance of a build being published to a destination (and you must select a destination in the build).

There are different ways to create a publication. Do one of the following:

- Publish Existing Build From the Publications grid, when you create a publication you can select a specific build and destinations.
- Build and Publish From the Builds grid, when you create a build you can select build settings and destinations. This is also applicable to scheduling builds.

Permission Required?

For this activity, you must have the following permission to control and allow access to external servers:



A user with Administrator rights is expected to have the Manage Integrations permission to integrate a connector with a Flare Online license.

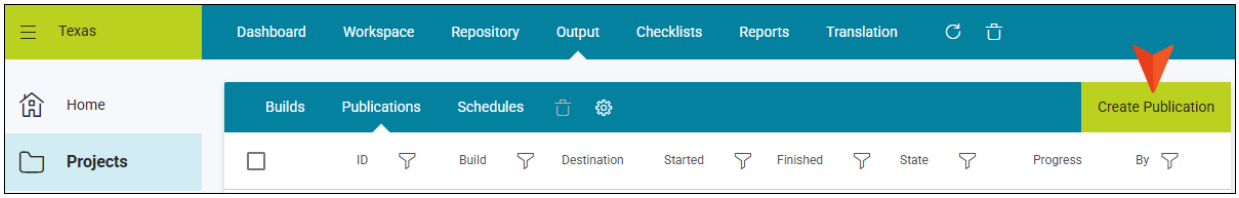
For this activity, you must have the following permission:



Users associated with a project only need the Publish Builds permission for publishing output.

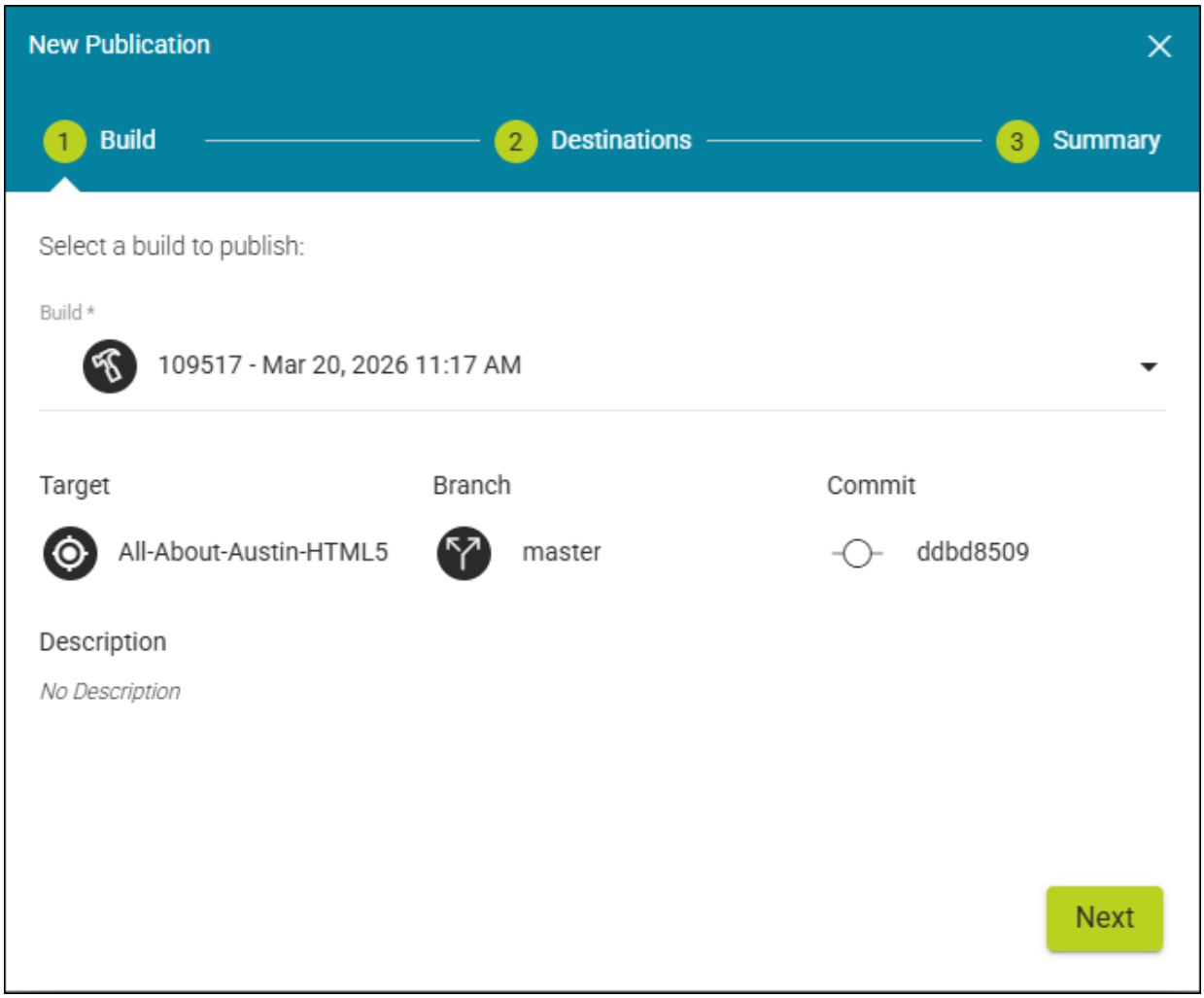
How to Create a Publication

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. Select the **Publications** tab.
4. In the upper-right, click **Create Publication**.



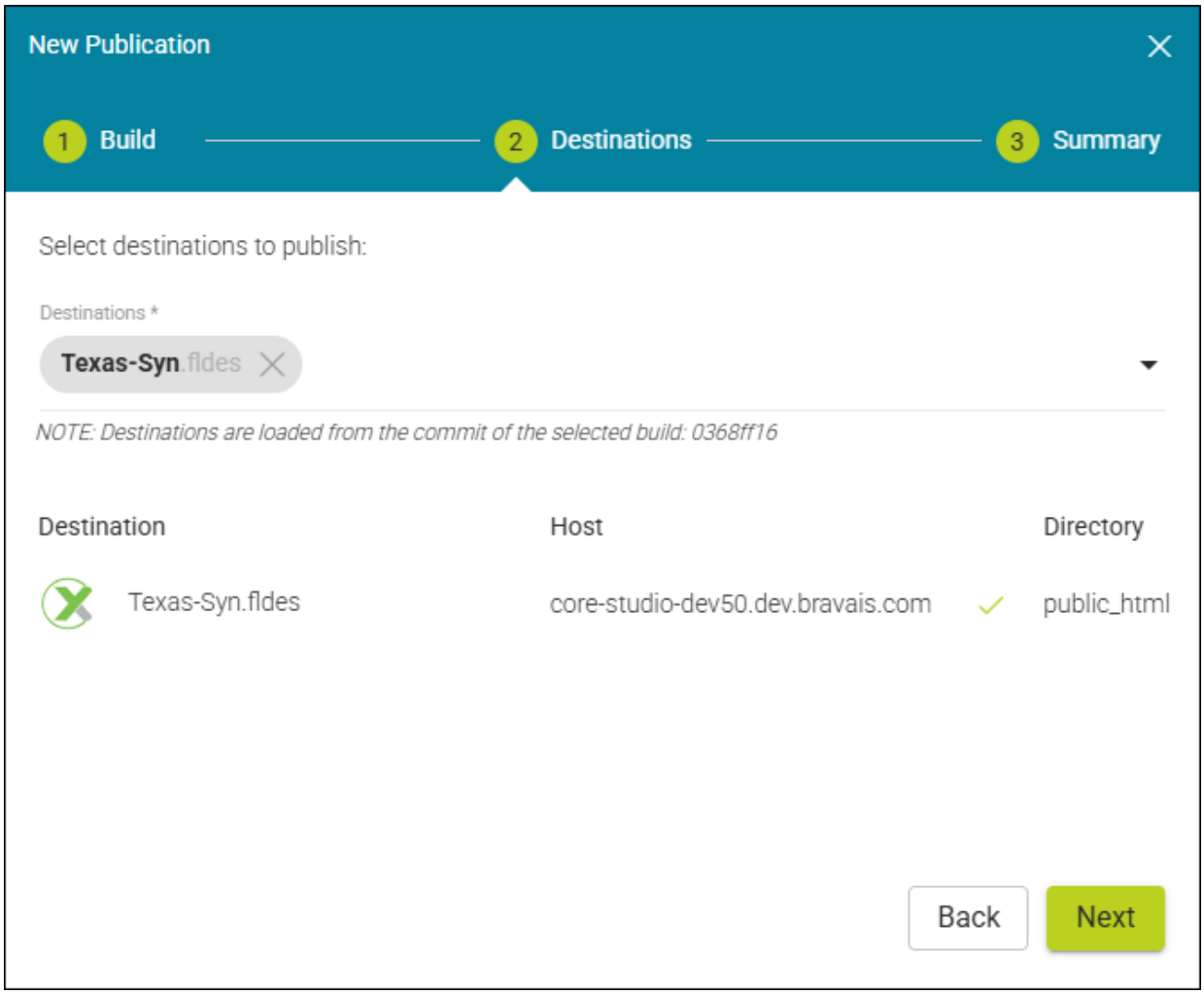
The New Publication wizard opens.

5. From the **Build** drop-down, select the appropriate build (i.e., Build, Target, Branch).



6. Click **Next**.

7. From the **Destinations** drop-down, select the destination(s) where you want the publication to go to for your host. If the destination drop-down is empty, you need to add one.

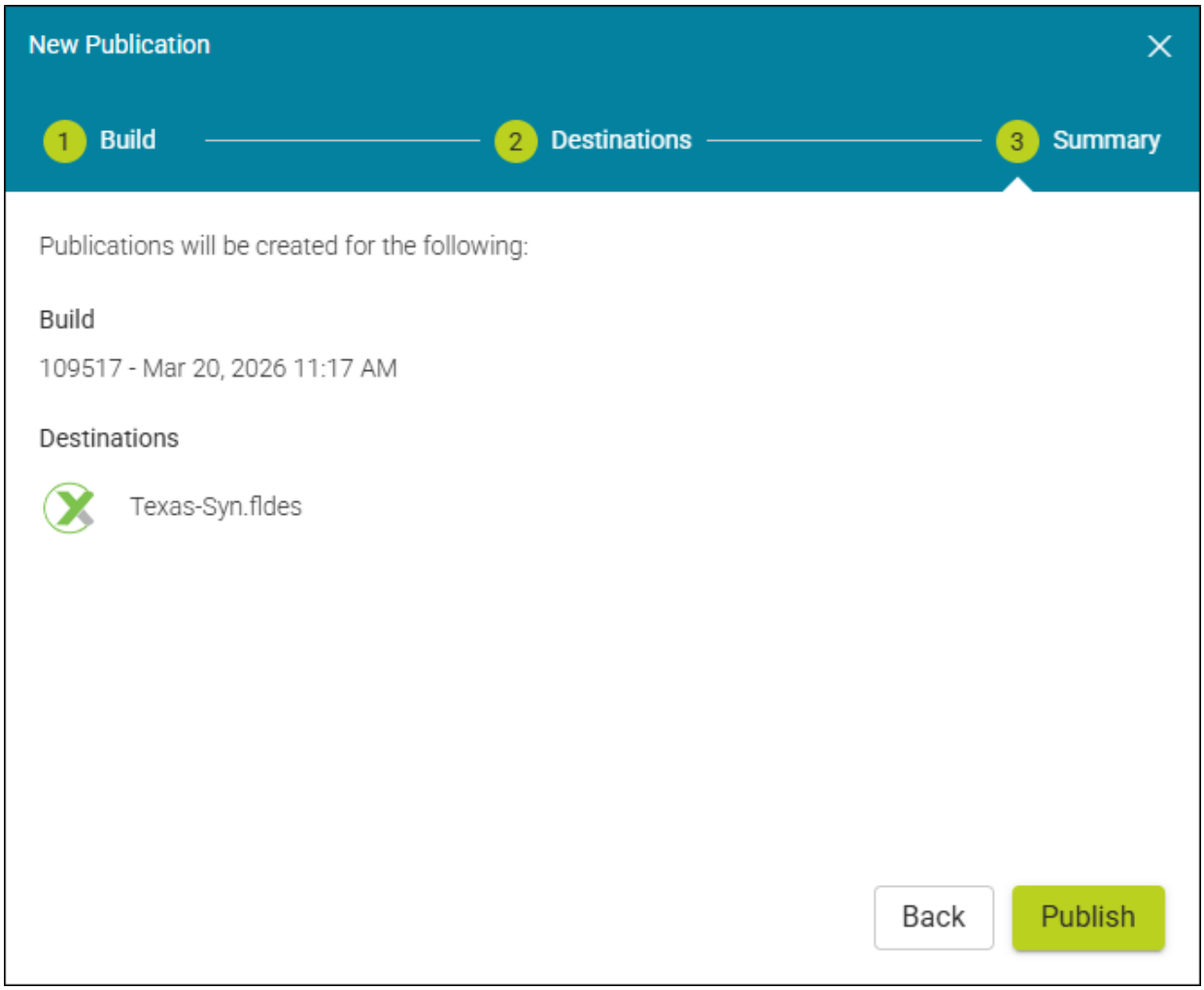


The software will indicate either a found connector or an invalid connector. If a connector is not found you will not be able to advance in the wizard.

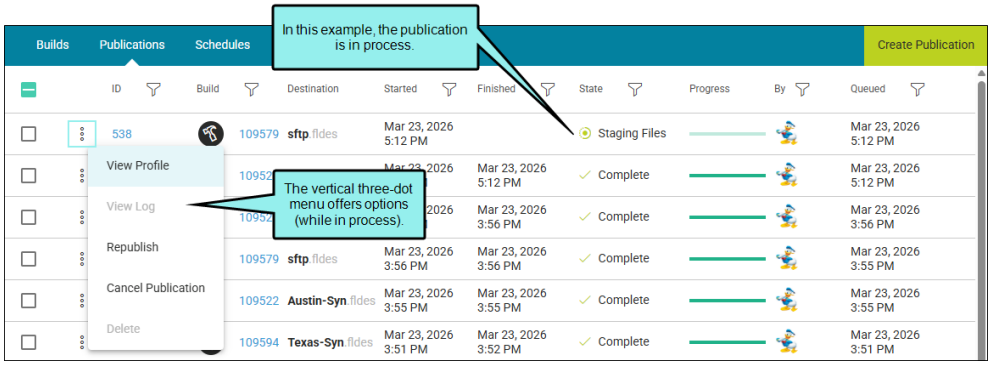
> NOTE The New Publication wizard is using the destination file from when it was originally built. This means that if you change your destination settings, you will need to rebuild before you republish.

8. Click **Next**.

9. View a summary of the publication, and click **Publish**. (Or click **Back**.)

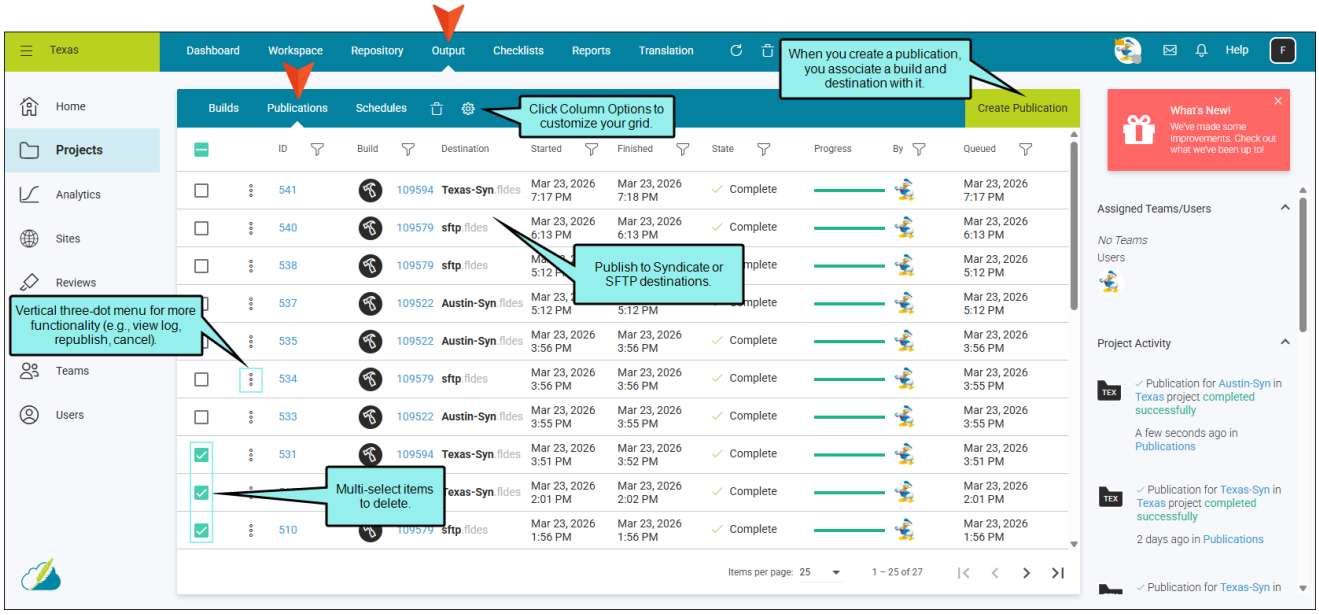


The Publication grid gains focus with the publish process in progress.



Publications Grid

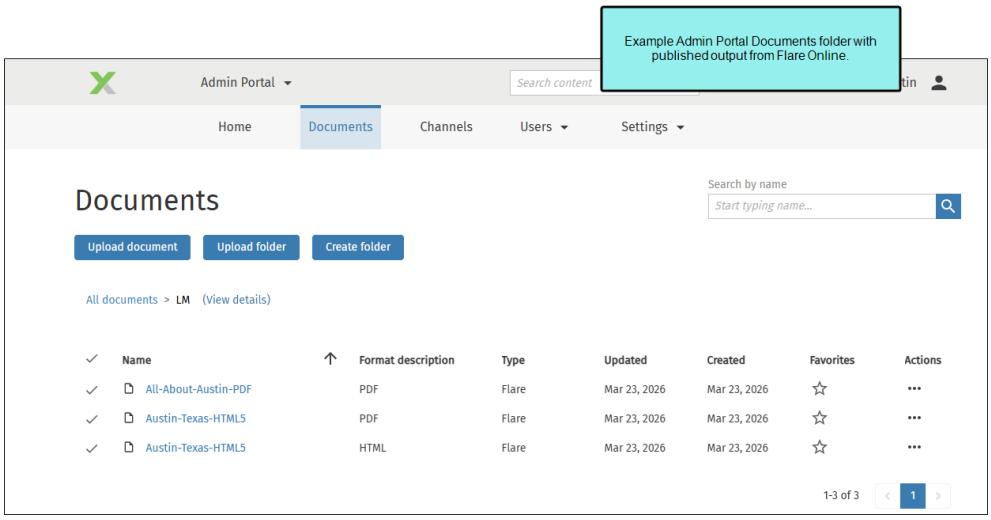
Use the Publications grid as a central point to manage your publications.



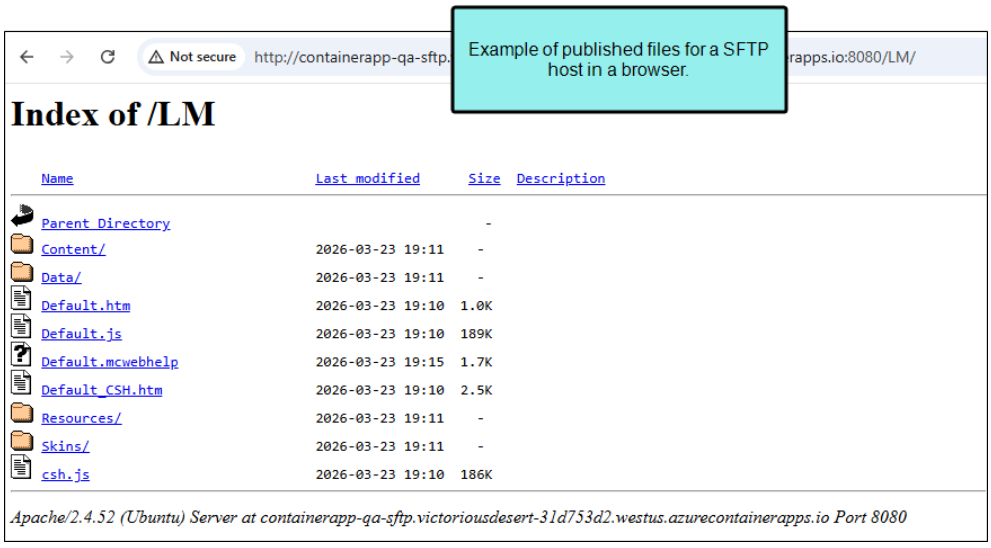
The final state of the publishing process shows Complete or Failed.

COMPLETE

- If a Syndicate publish is successful, you can open your Syndicate Admin Portal and view your document.

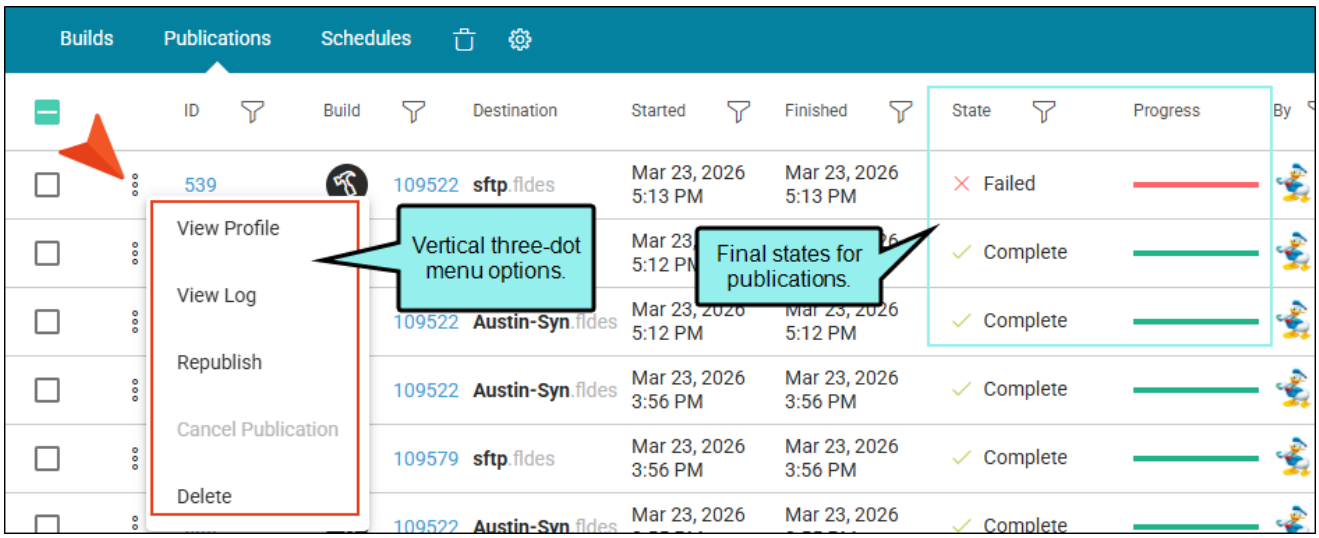


- If an SFTP publish is successful, you can view files for the Connector URL (Host Name) in a browser, and click content files. Or you can view items in a client utility facilitating the file transfer (e.g., FileZilla).



FAILED

In the Publications grid you can click the vertical three-dot menu. From here, you can do various things such as view its profile, view log, republish, or delete it. If your publication fails, click View Log for a dialog that shows messages, warnings, and errors, to help identify what happened to it.

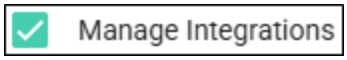


Deleting Publications

You can delete publications from Flare Online.

Permission Required?

For this activity, you must have the following permission to control and allow access to external servers:



A user with Administrator rights is expected to have the Manage Integrations permission to integrate a connector with a Flare Online license.

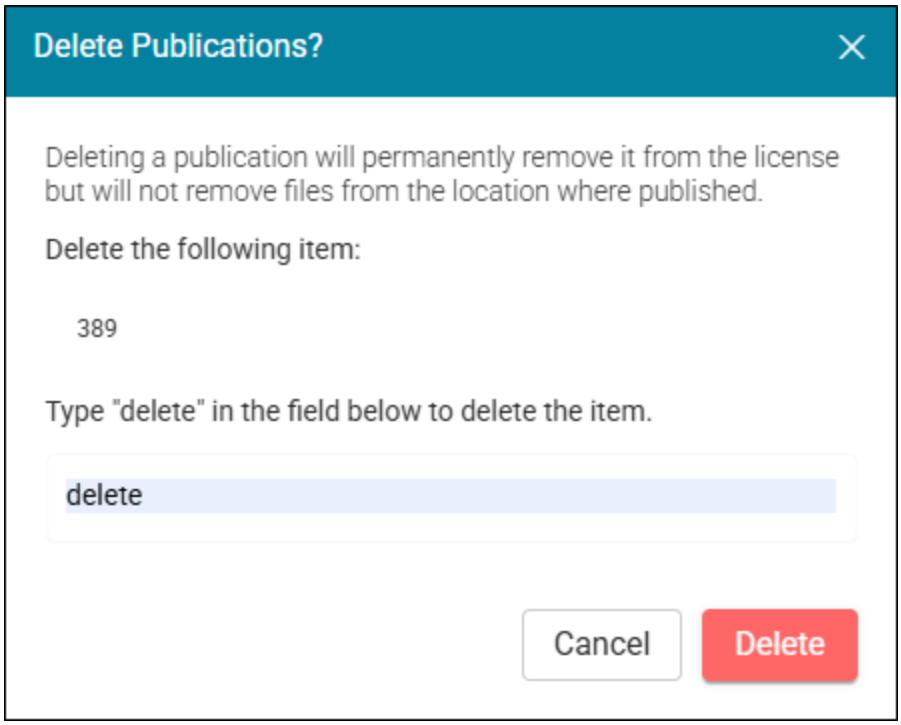
For this activity, you must have the following permission:



Users associated with a project only need the Publish Builds permission for publishing output.

How to Delete Publications

1. Select **Projects** on the left side of the interface, then click a project name to open it.
2. At the top of the page, click **Output**.
3. In the **Publications** grid, click the check box to the left of each publication you want to delete. Or click the top check box to select all publications.
4. In the toolbar, click .
5. In the dialog, type `delete` in the field under the listed publications.
6. Click **Delete**.



NOTE Deleting a publication(s) from Flare Online does permanently remove it from the license, but it does not remove it from the external location.

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 Guide

Links Guide

Projects Guide

Reports Guide

Reviews Guide

Security Whitepaper

Sites Guide

Snippets Guide

Source Control Guide

Styles Guide

Targets Guide

Tasks Guide

TOC Guide

Topics Guide

Translation Guide

Users and Teams Guide

Variables Guide

What's New Guide

Widgets Guide