madcap software

USER GUIDE

MADCAP FLARE ONLINE

Getting Started Guide

Copyright © 2026 MadCap Software. All rights reserved.

Information in this document is subject to change without notice. The software described in this document is furnished under a license agreement or nondisclosure agreement. The software may be used or copied only in accordance with the terms of those agreements. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or any means electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of MadCap Software.

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

THIS PDF WAS CREATED USING MADCAP FLARE.

CONTENTS

CHAPTER 1

Introduction 5

CHAPTER 2

Interface 7

Responsive Interface 13

CHAPTER 3

Users and Permissions 15

CHAPTER 4

Teams 20

CHAPTER 5

Projects and Output 23

Creating Projects 25

Uploading Projects 26

Associating Users With Projects 27

Project Dashboard 31

Workspace 32

Repository 33

Output 35

Checklists 36
Reports 37
Translation 38
Accessing Other Projects 39

CHAPTER 6

Sites 41

CHAPTER 7

Analytics 42

CHAPTER 8

Reviews 43

CHAPTER 9

Tasks 45
Board 49
Grid 55
Calendar 56
Backlog 59
Archive 60

CHAPTER 10

Widgets 61

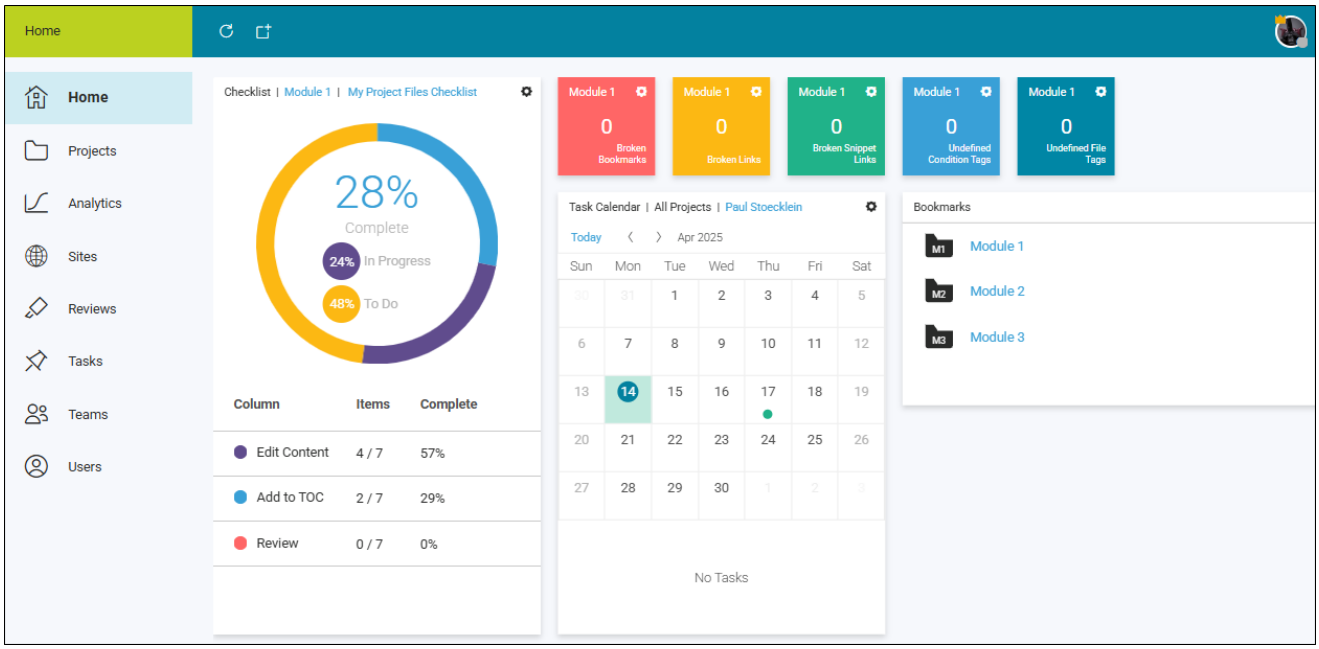
APPENDIX

PDFs 65

CHAPTER 1

Introduction

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



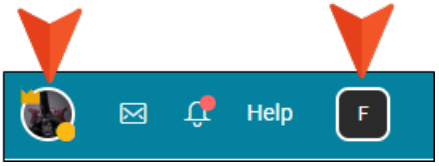
This guide discusses the following:

- Interface Take a quick look at the basic areas of the interface, especially the main navigation framework. See "Interface" on page 7.
- Users and Permissions Learn about inviting users to your license and setting permissions to control what each person is allowed to do. See "Users and Permissions" on page 15.
- Teams Discover how you can organize users on your license into teams. See "Teams" on page 20.
- Projects and Output See how you can create projects directly in Flare Online, upload projects, associate users with them, and manage builds (output). See "Projects and Output" on page 23.
- Sites Learn about using sites to manage your output (live and/or private), as well as the domains (URLs) for accessing the output. See "Sites" on page 41.
- Analytics View user activity on published HTML5 output. See "Analytics" on page 42.
- Reviews Take a look at how you can view, edit, and manage Flare review files. See "Reviews" on page 43.
- Tasks Understand how tasks can help you manage your workload and processes. See "Tasks" on page 45.
- Widgets Learn how to insert information objects (widgets) into your Home and Project dashboards. See "Widgets" on page 61.

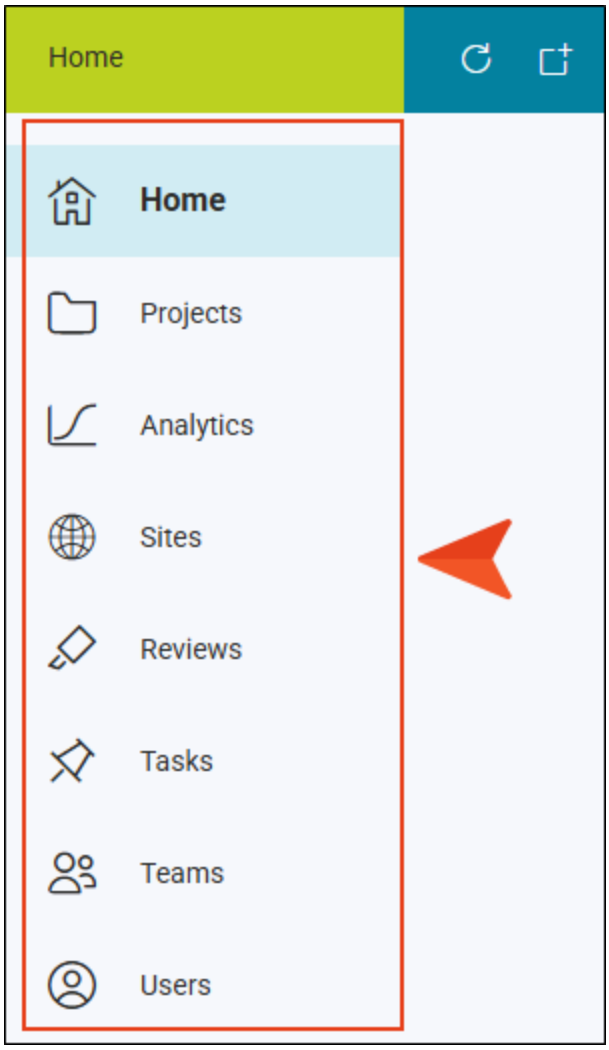
CHAPTER 2

Interface

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



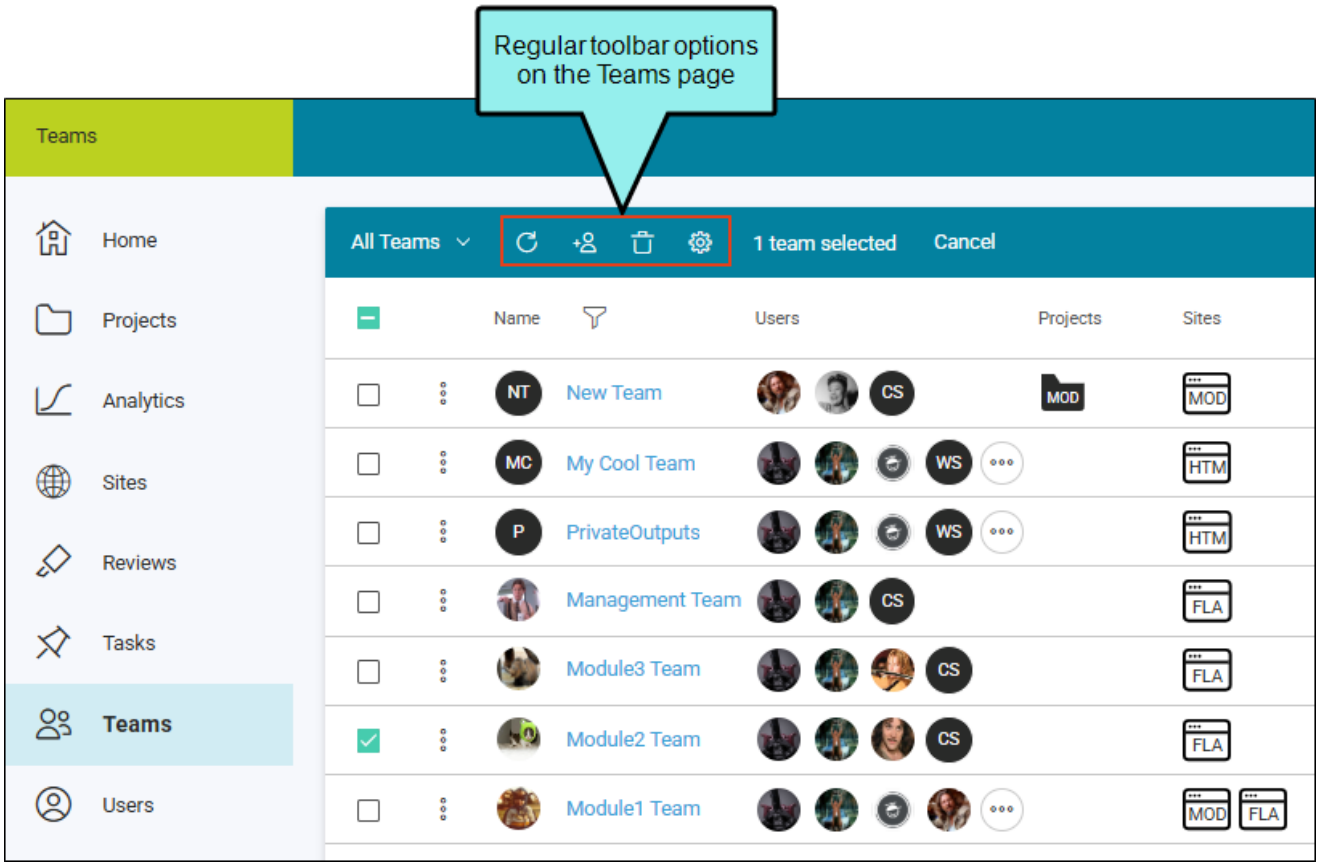
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, and Users.

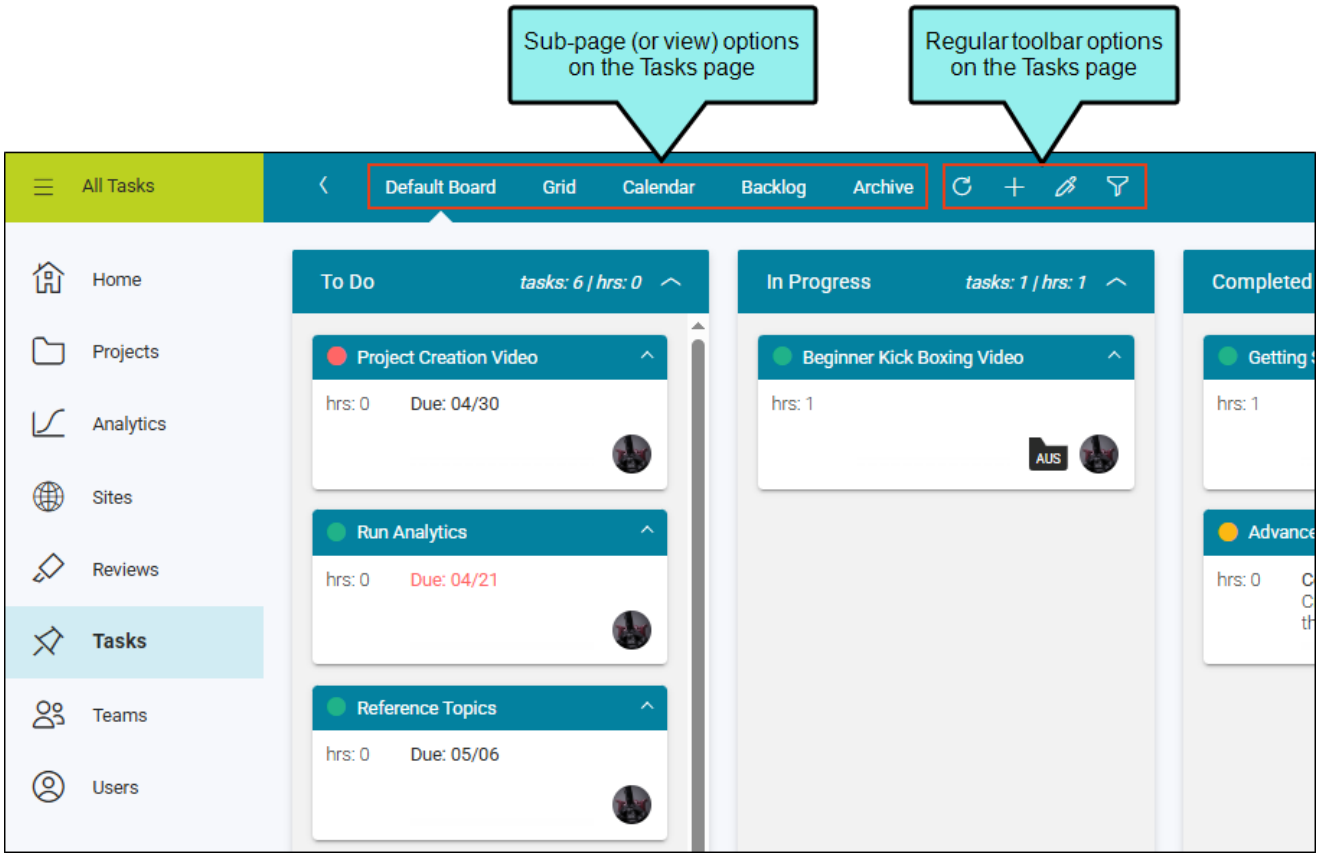


NOTE If you are a subject matter expert (SME), rather than a Flare author, you will only see the Reviews page.

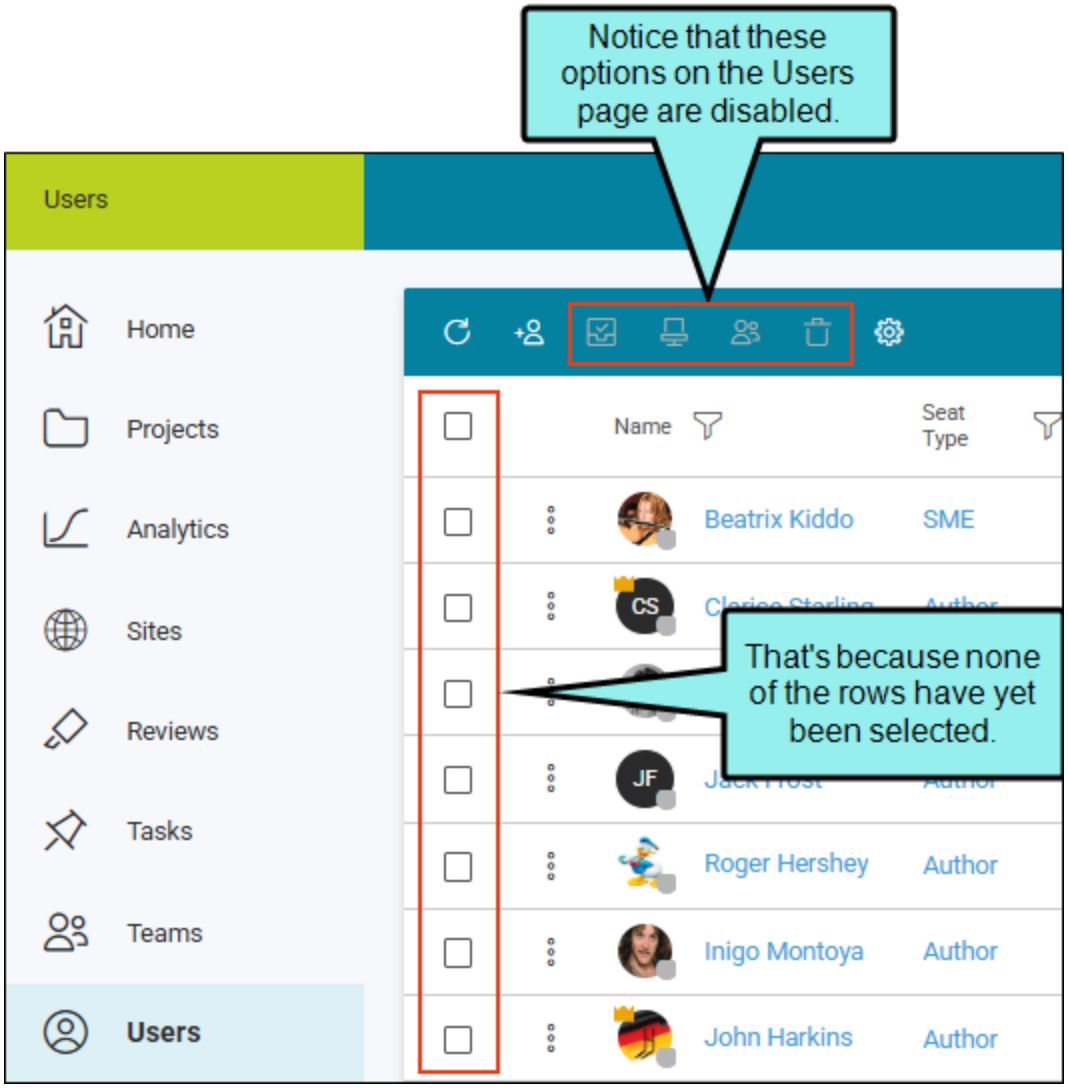
Your Home dashboard is initially empty, but you can add widgets to it by clicking  at the top. Widgets provide a quick glance of various types of information throughout your system. See "Widgets" on page 61.

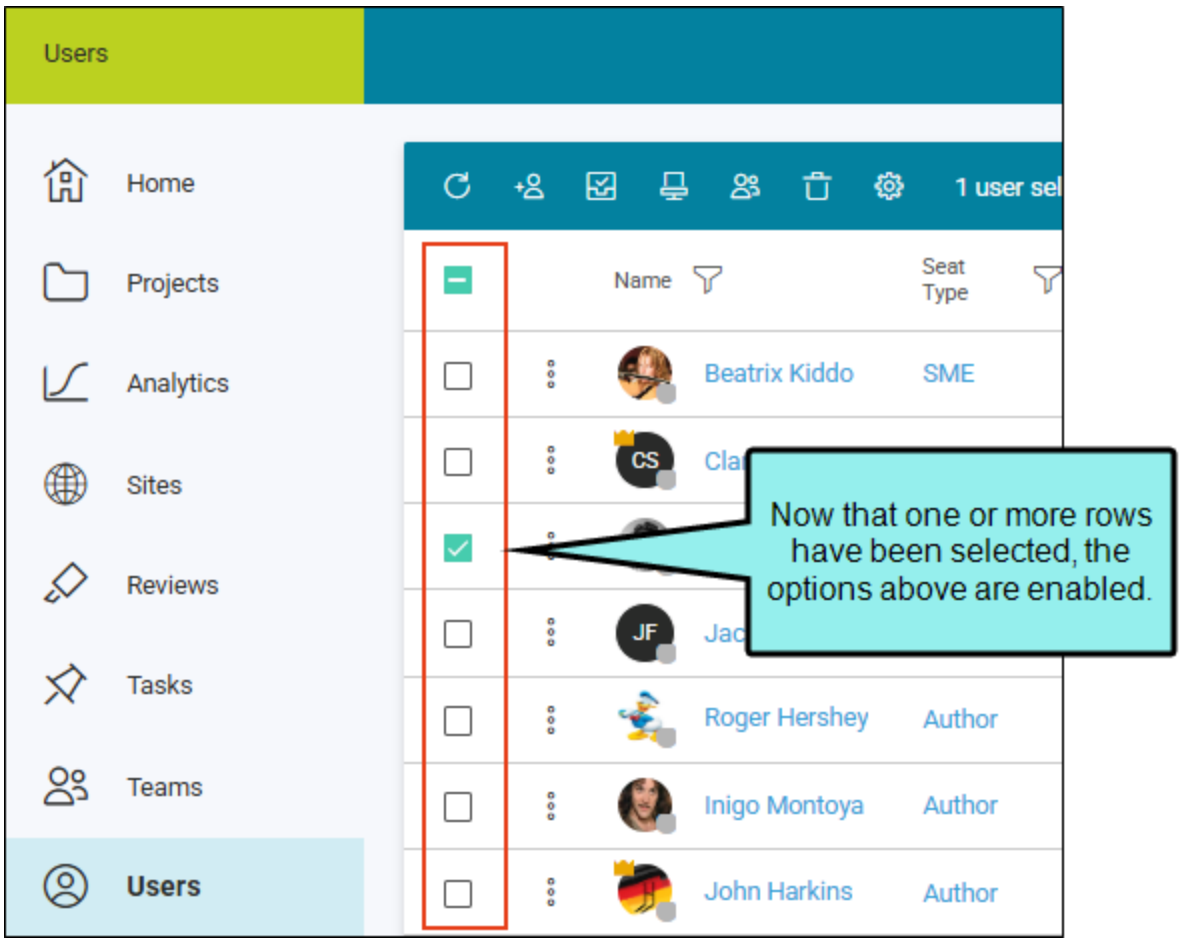
Each page in Flare Online has a toolbar that lets you add, manage, and remove information on that page. Some pages—such as Projects and Tasks—have additional options at the very top of the interface, which let you see different sub-pages (or views).




Sub-page (or view) options on the Tasks page
Regular toolbar options on the Tasks page
All Tasks
Default Board
Grid
Calendar
Backlog
Archive
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
To Do
tasks: 6 / hrs: 0
Project Creation Video
hrs: 0
Due: 04/30
Run Analytics
hrs: 0
Due: 04/21
Reference Topics
hrs: 0
Due: 05/06
In Progress
tasks: 1 / hrs: 1
Beginner Kick Boxing Video
hrs: 1
AUS
Completed
hrs: 1
hrs: 0

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

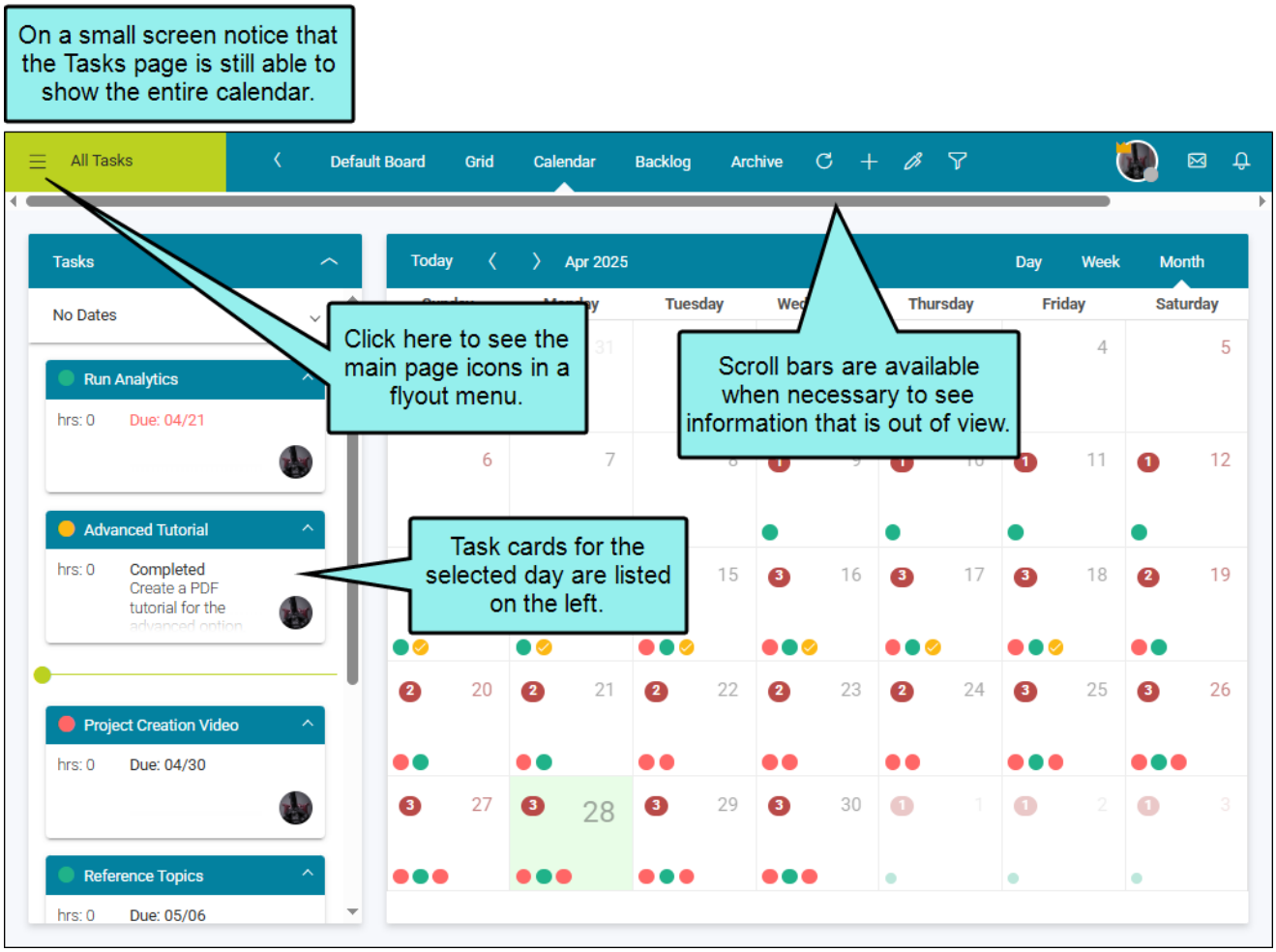


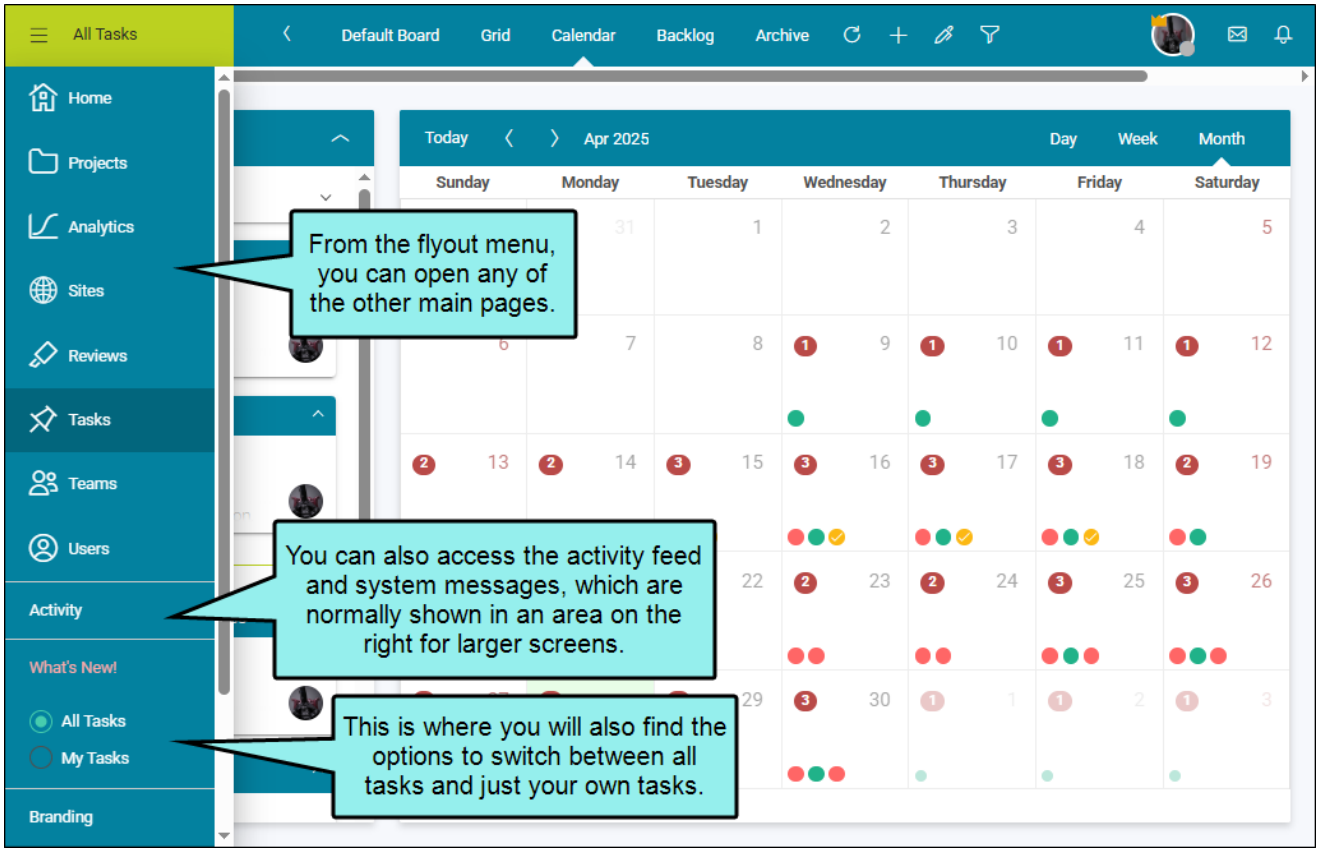

Users
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
1 user sel
Name
Seat Type
Beatrix Kiddo
SME
CS
JF
Roger Hershey
Author
Inigo Montoya
Author
John Harkins
Author
Now that one or more rows have been selected, the options above are enabled.

Responsive Interface

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

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

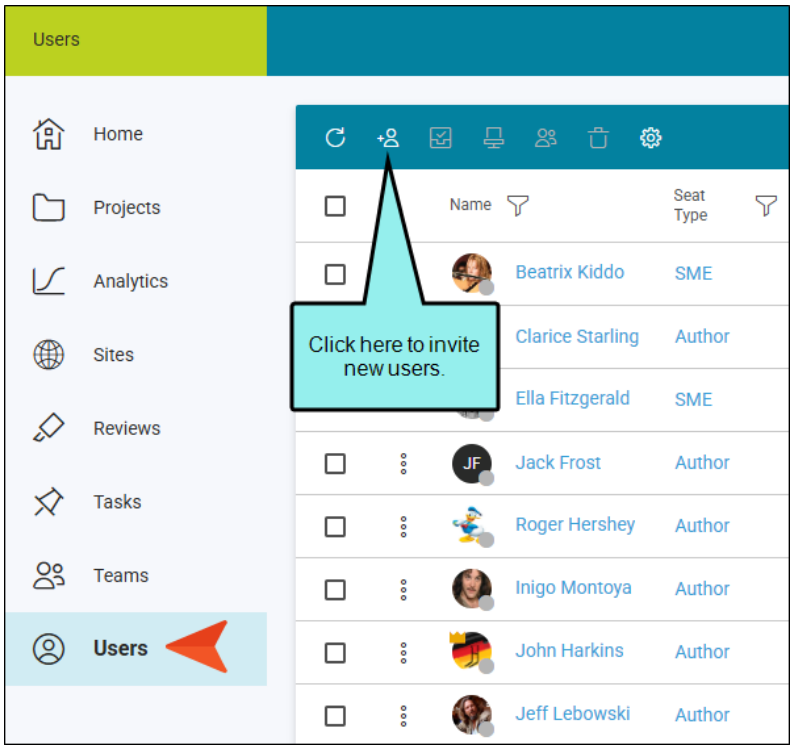



All Tasks
Default Board
Grid
Calendar
Backlog
Archive
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Activity
What's New!
All Tasks
My Tasks
Branding
Today
Apr 2025
Day
Week
Month
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
From the flyout menu, you can open any of the other main pages.
You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
This is where you will also find the options to switch between all tasks and just your own tasks.

CHAPTER 3

Users and Permissions

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

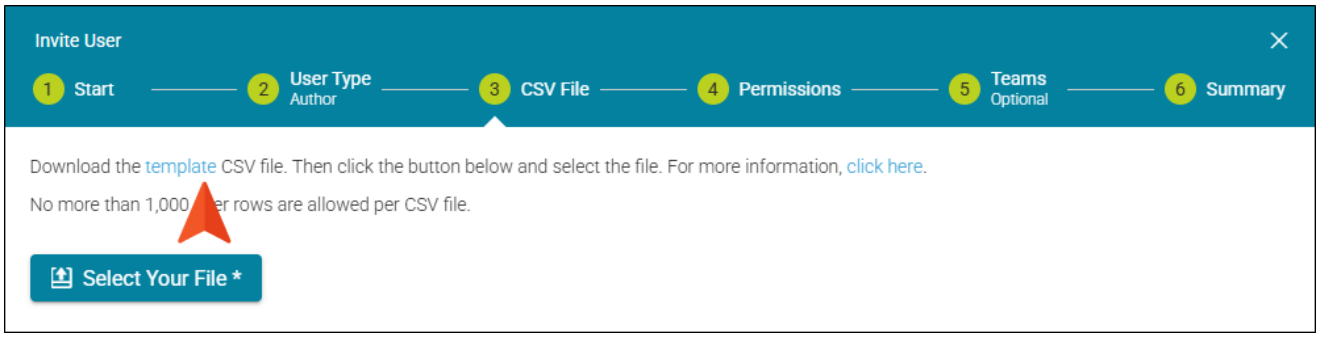


You can add multiple kinds of users.

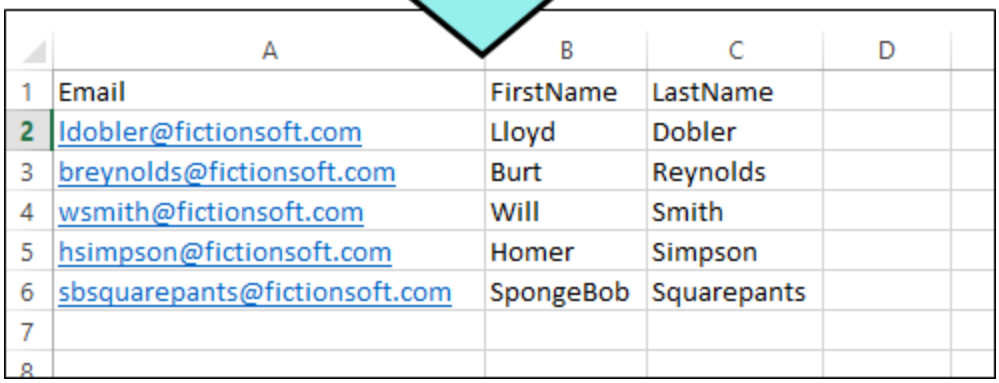
- Author An author is an individual who works in projects, creating and editing content. This person can also be the "owner" of a review when they send topics and snippets that need to be reviewed by others. Owners can assign other reviewers with the author seat type and permission to manage reviews.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

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

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



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

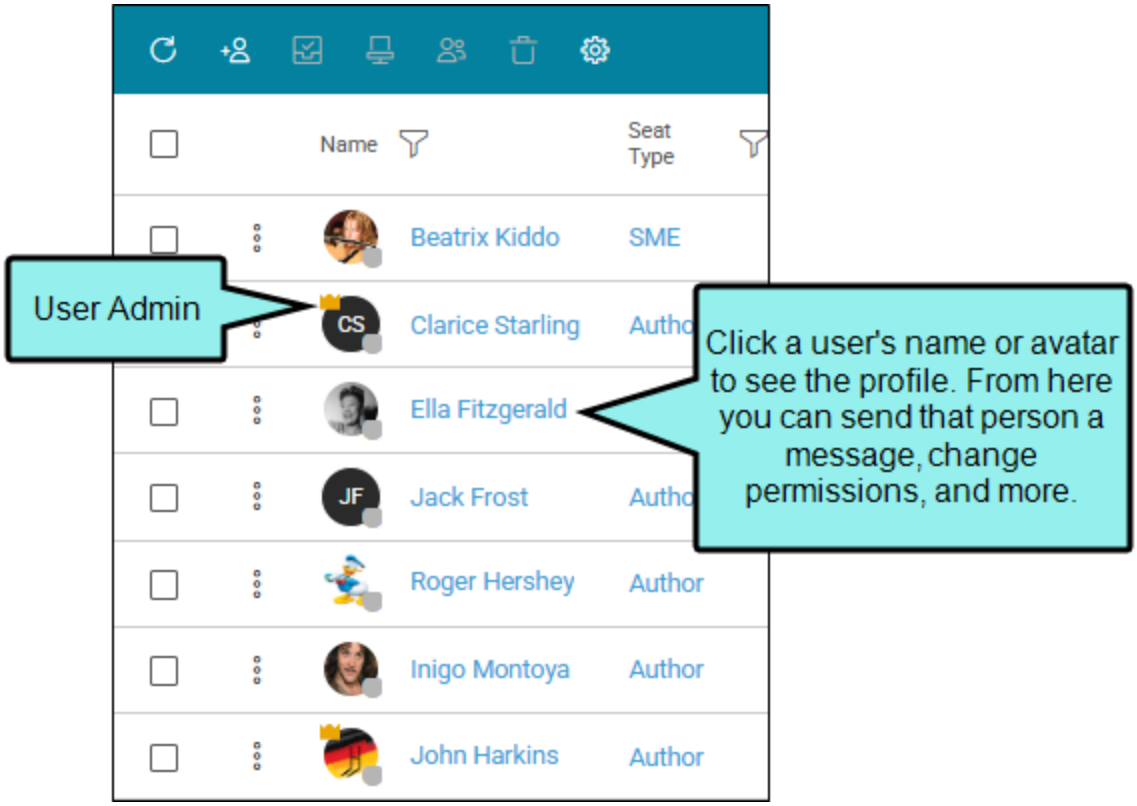


	A	B	C	D
1	Email	FirstName	LastName	
2	ldobler@fictionsoft.com	Lloyd	Dobler	
3	breynolds@fictionsoft.com	Burt	Reynolds	
4	wsmith@fictionsoft.com	Will	Smith	
5	hsimpson@fictionsoft.com	Homer	Simpson	
6	sbsquarepants@fictionsoft.com	SpongeBob	Squarepants	
7				
8				

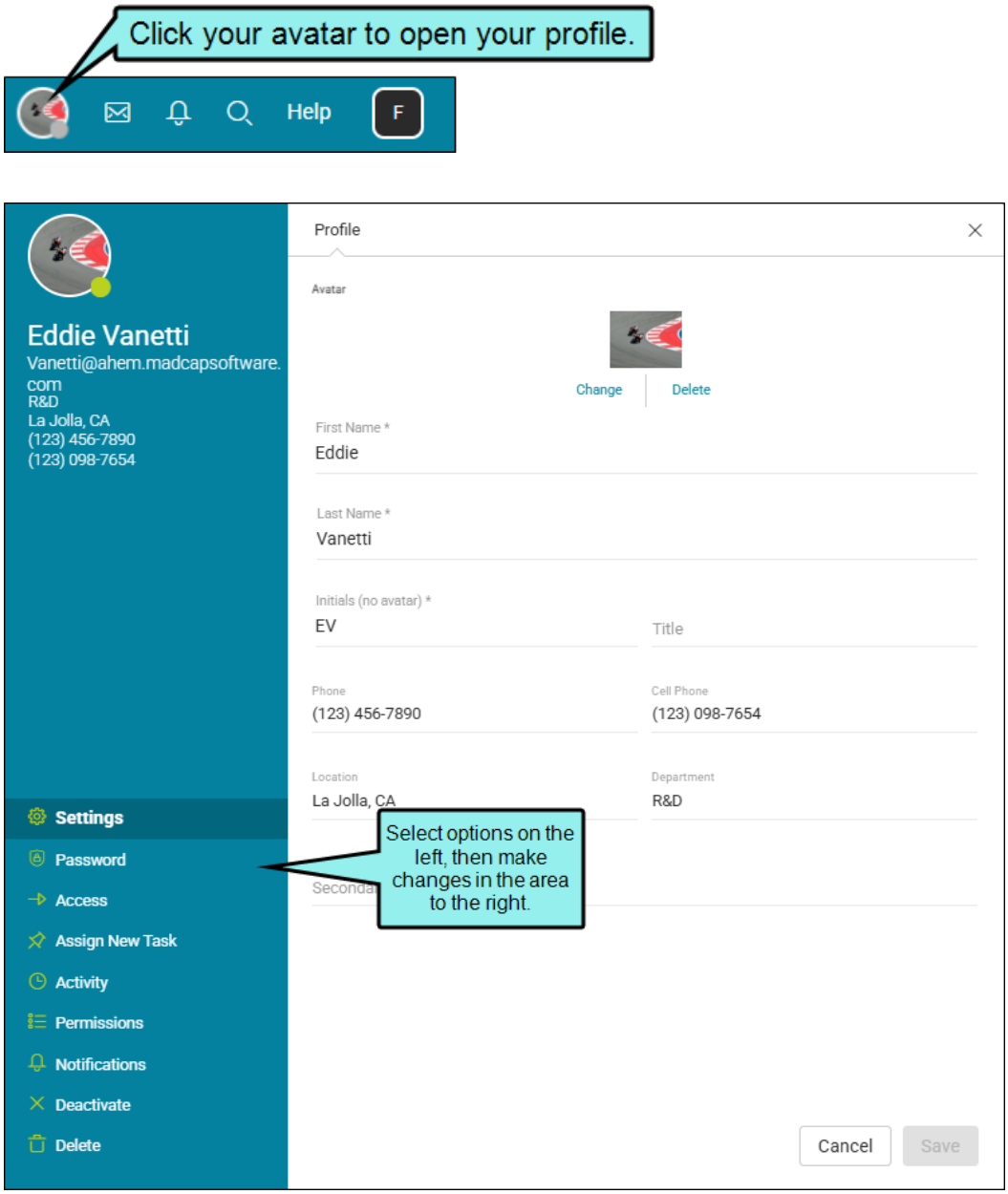
A person with “User Administration” rights can assign permissions to other users (authors only, not SMEs or viewers). Some users might receive only basic permissions, while others might be granted higher administrative rights.

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

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



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

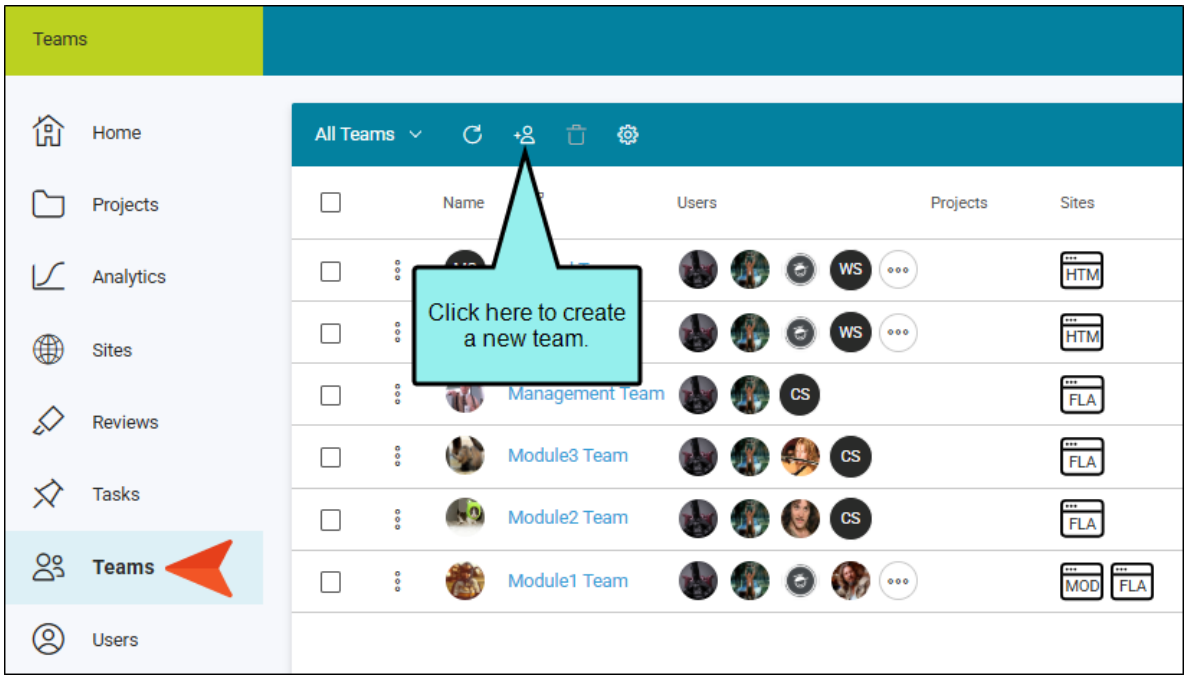


NOTE The notifications feature is available for author user types only, not for SMEs or viewers.

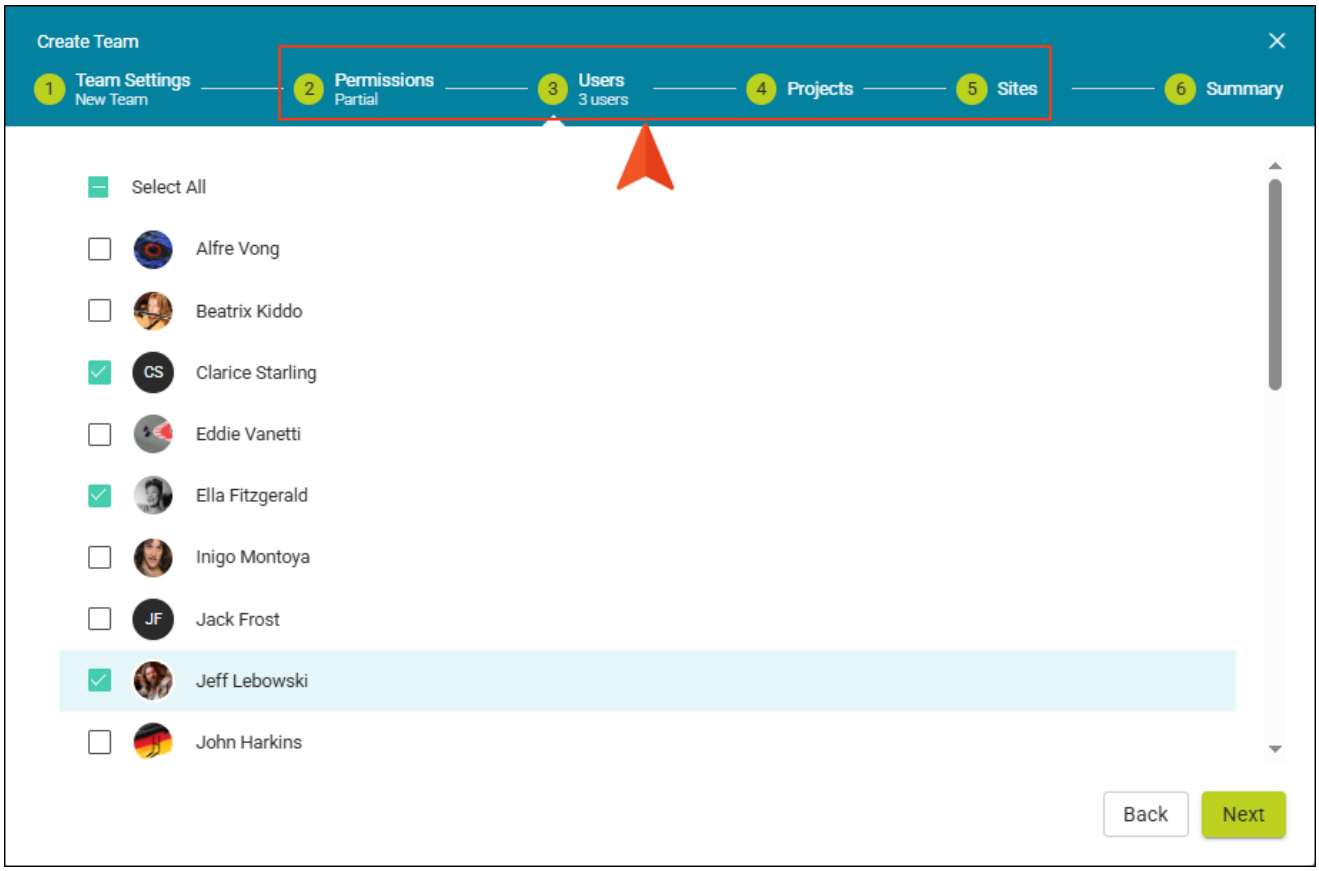
CHAPTER 4

Teams

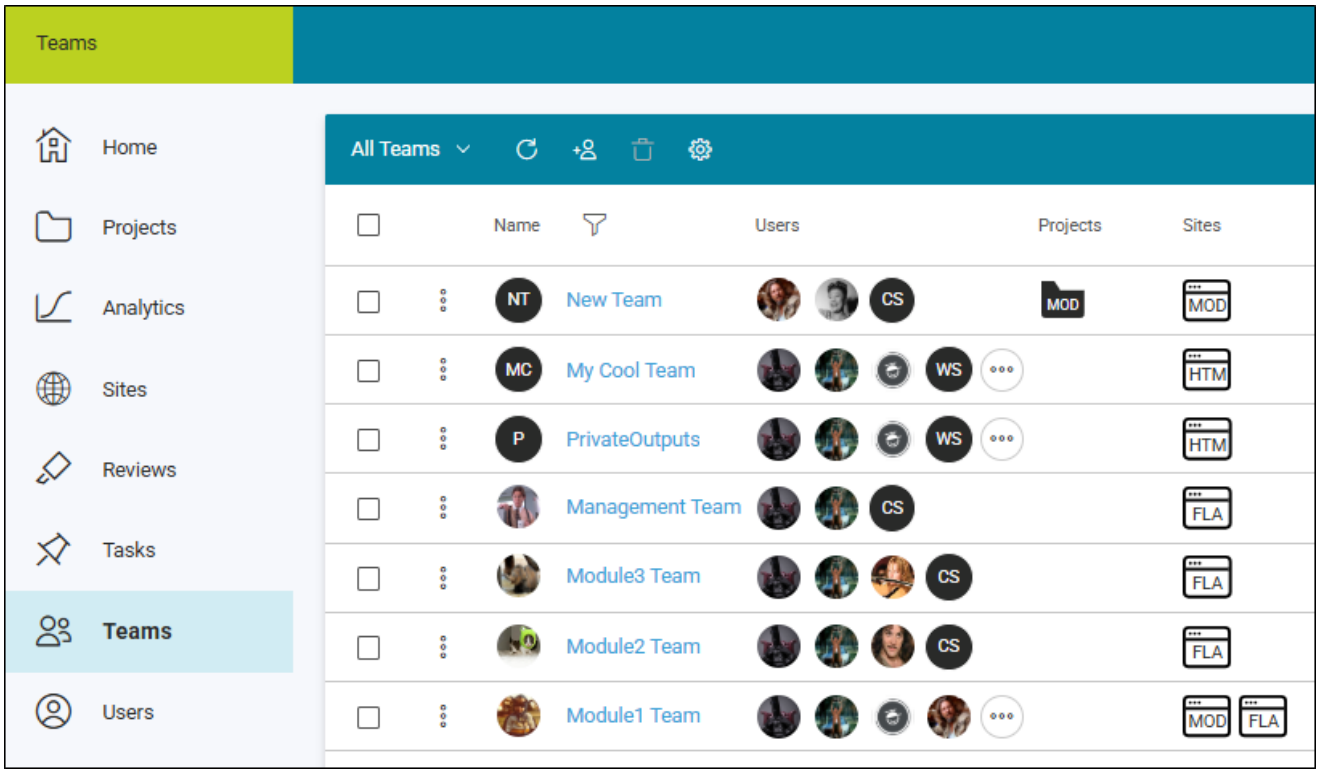
The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects, as well as to give users permissions on the license. Teams are also important if you produce private output, because only members of a team that is associated with the private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



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



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



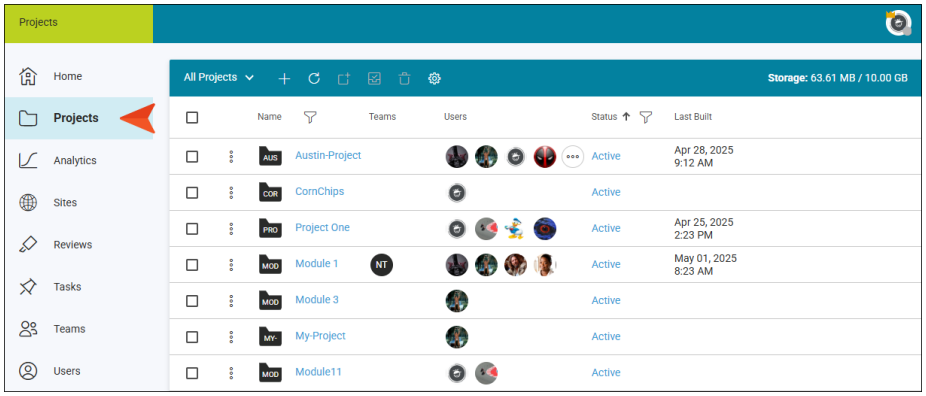
CHAPTER 5

Projects and Output

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

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

Regardless of whether you create a project in Flare Online or upload it, you can do the following: (1) collaboratively author, add, and edit project files directly in Flare Online, with the ability to tap into the power of ChatGPT; (2) create and manage branches; (3) build and publish output; (4) manage progress on topic development by using checklists; and (5) create a translation branch, using MadTranslations or a third-party language service provider to get translations done.

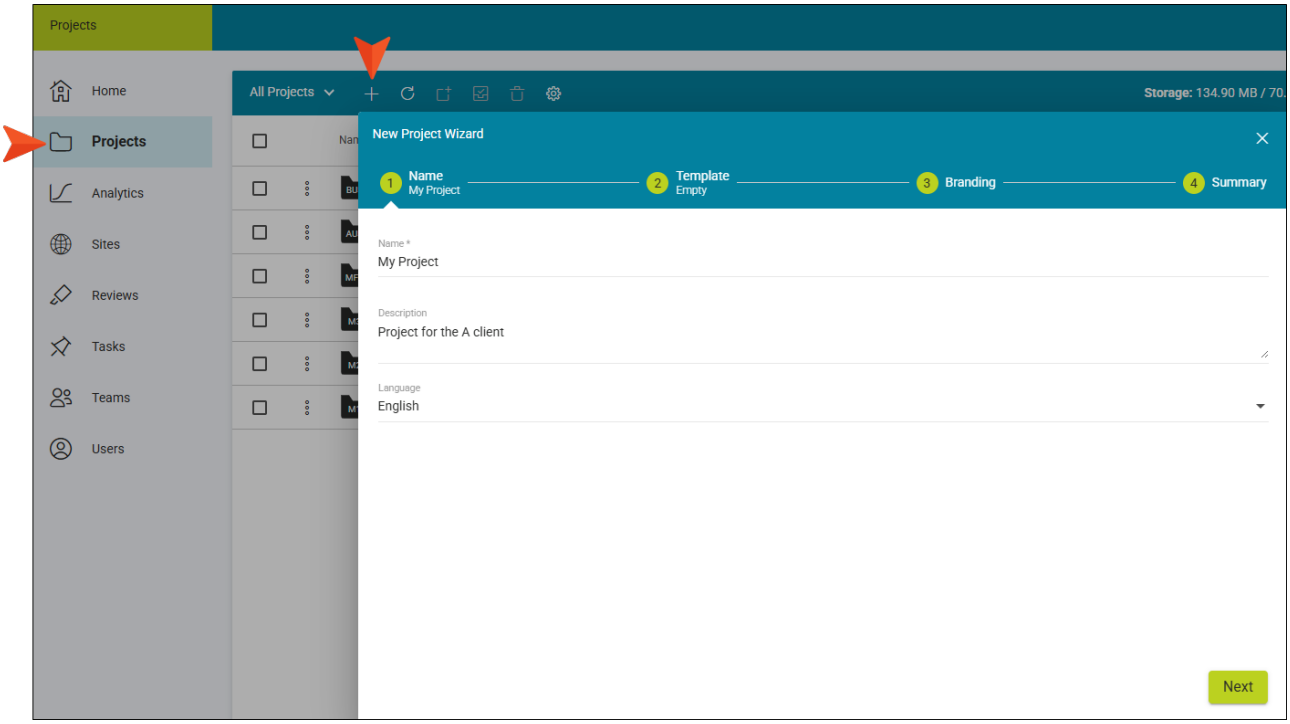


This chapter discusses the following:

Creating Projects 25
Uploading Projects 26
Associating Users With Projects 27
Project Dashboard 31
Workspace 32
Repository 33
Output 35
Checklists 36
Reports 37
Translation 38
Accessing Other Projects 39

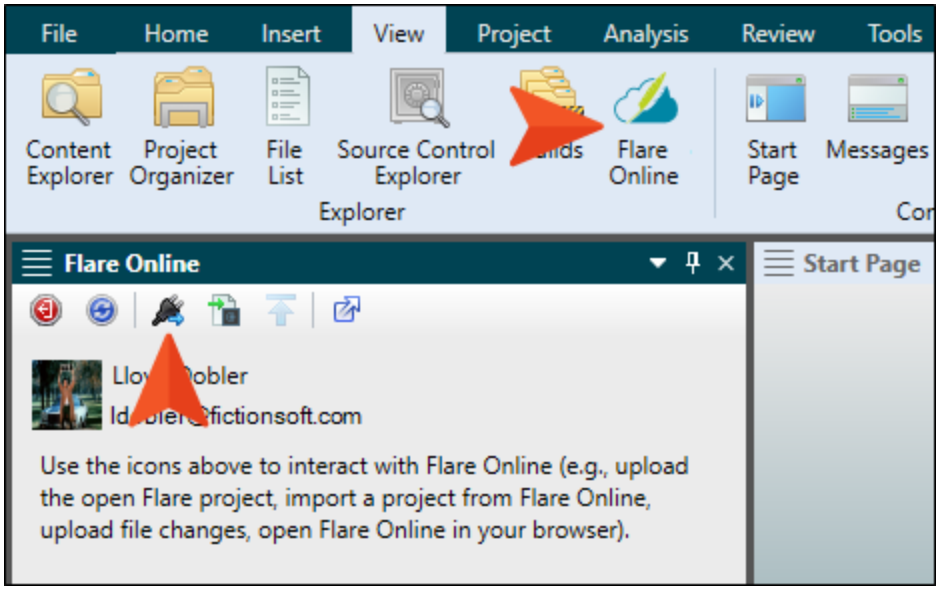
Creating Projects

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



Uploading Projects

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

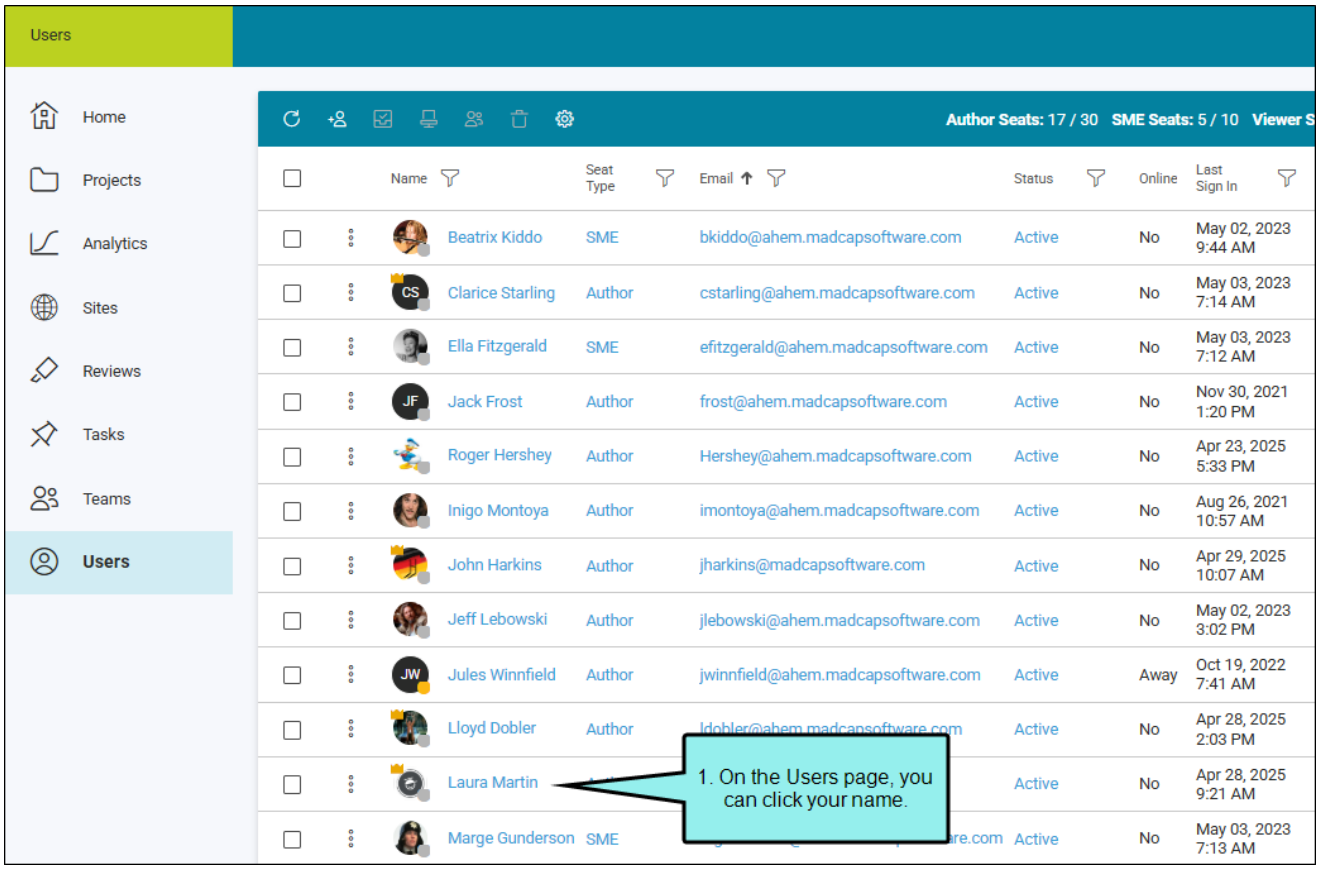


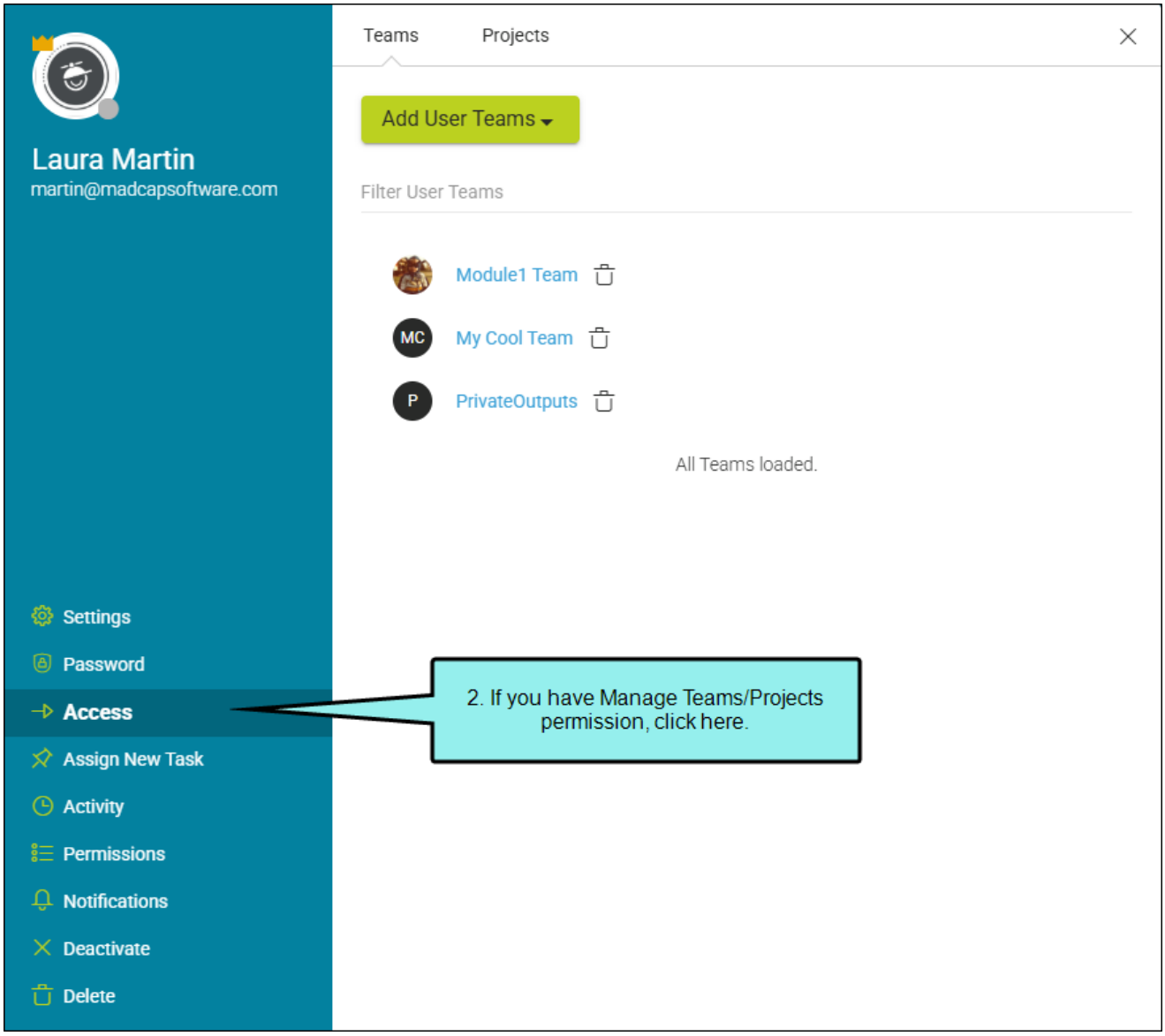
IMPORTANT Flare Online is not a replacement for Flare Desktop. You can continue to author your project content locally in Flare Desktop. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project in Flare Online. If you are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

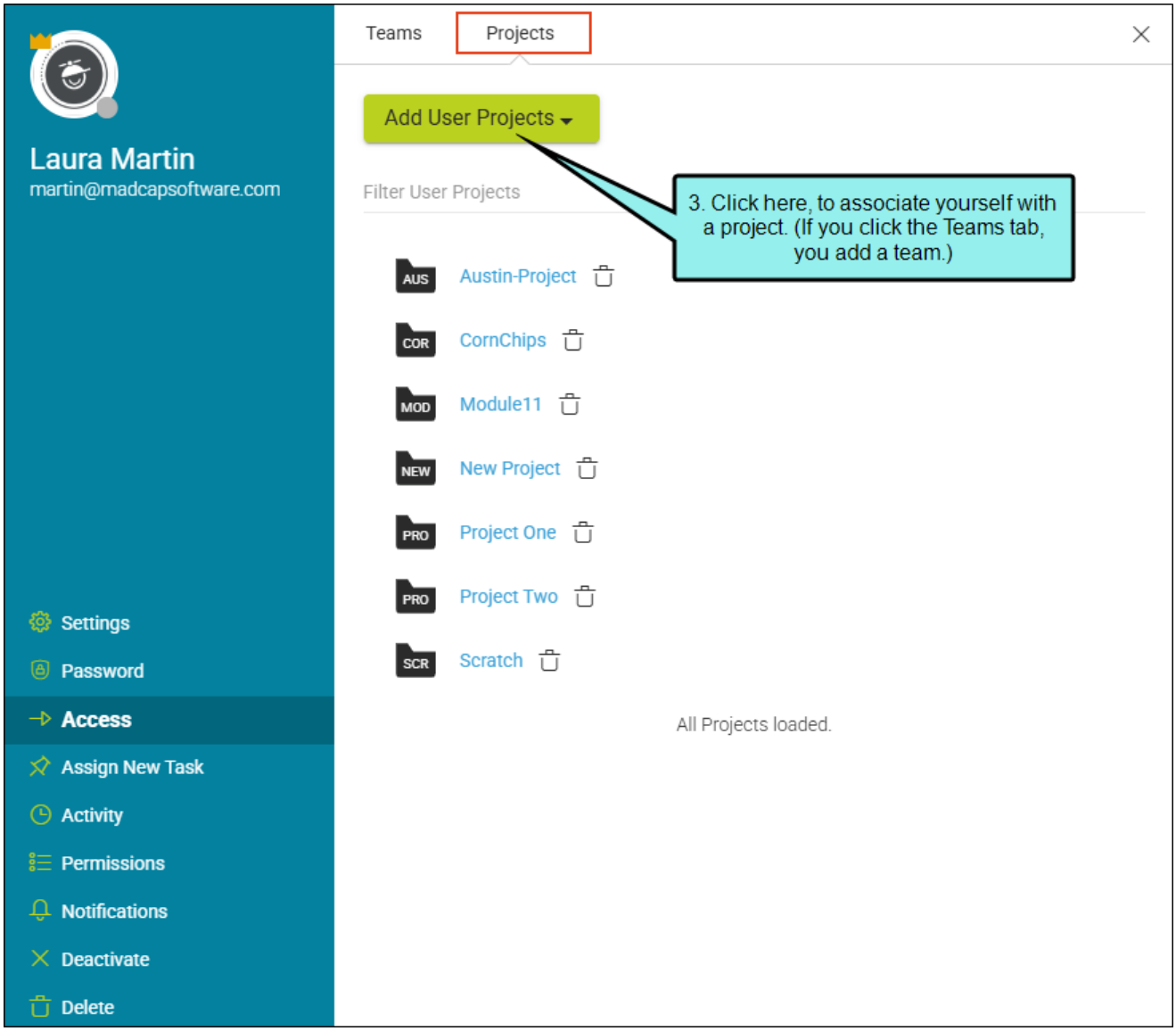
NOTE When you upload a project to Flare Online, the files are connected to Flare Online via an integrated source control system (Git). Your interaction with source control can follow one of two models—single-bound (recommended) or dual-bound. For more information, see the Help system or the *Projects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

Associating Users With Projects

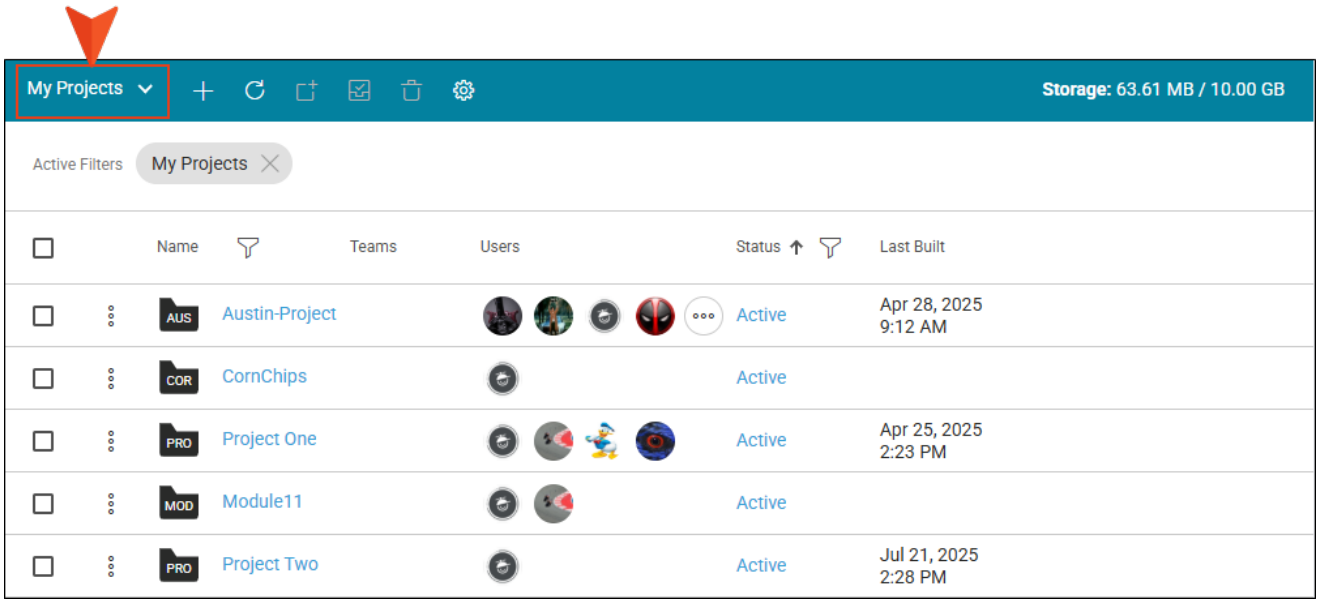
All users can see all the projects listed in the grid on the Projects page. However, to open a project (by clicking on its name) or take action on it, you must be associated with that project. There are a few ways to become associated with a project. First, you can upload a project to Flare Online yourself.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




Laura Martin
martin@madcapsoftware.com
Teams
Projects
Add User Teams
Filter User Teams
Module1 Team
MC
My Cool Team
P
PrivateOutputs
All Teams loaded.
Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
2. If you have Manage Teams/Projects permission, click here.


Laura Martin
martin@madcapsoftware.com
Settings
Password
Access
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Teams
Projects
Add User Projects
Filter User Projects
3. Click here, to associate yourself with a project. (If you click the Teams tab, you add a team.)
AUS
Austin-Project
COR
CornChips
MOD
Module11
NEW
New Project
PRO
Project One
PRO
Project Two
SCR
Scratch
All Projects loaded.

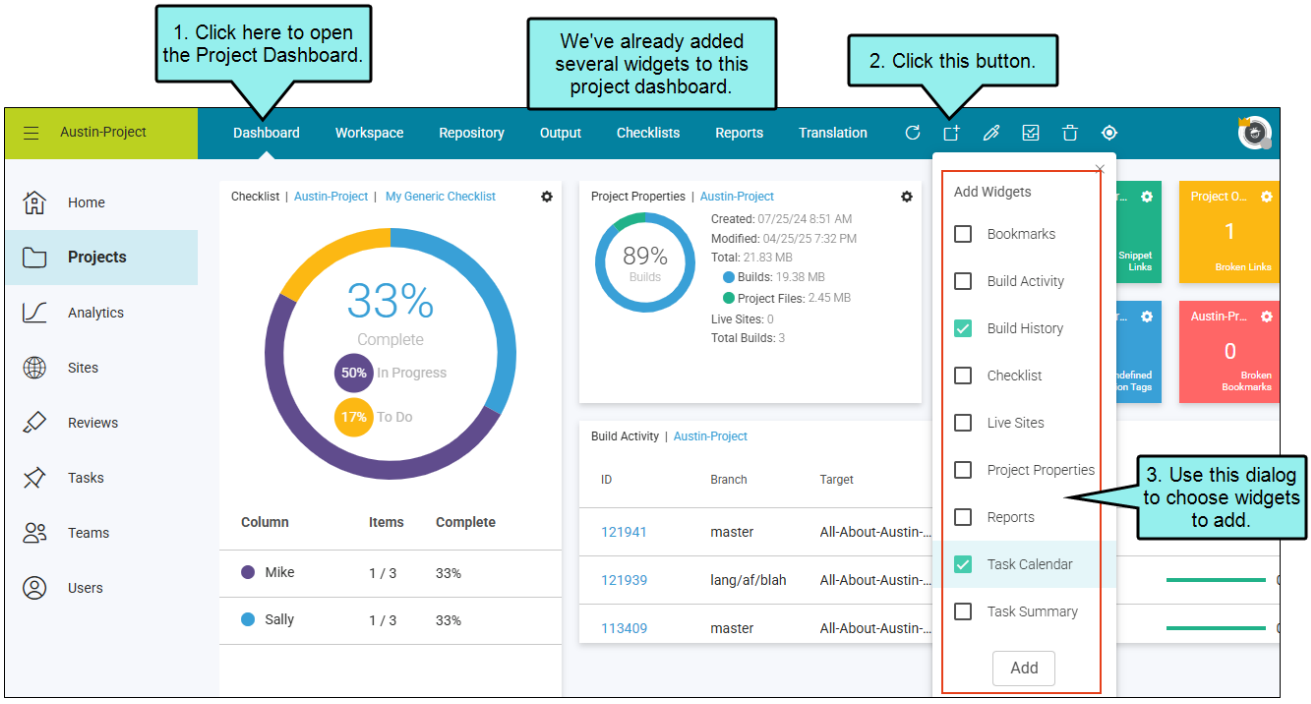
There is also a drop-down on the Projects page that lets you switch between seeing all projects and only the projects you are associated with.



Project Dashboard

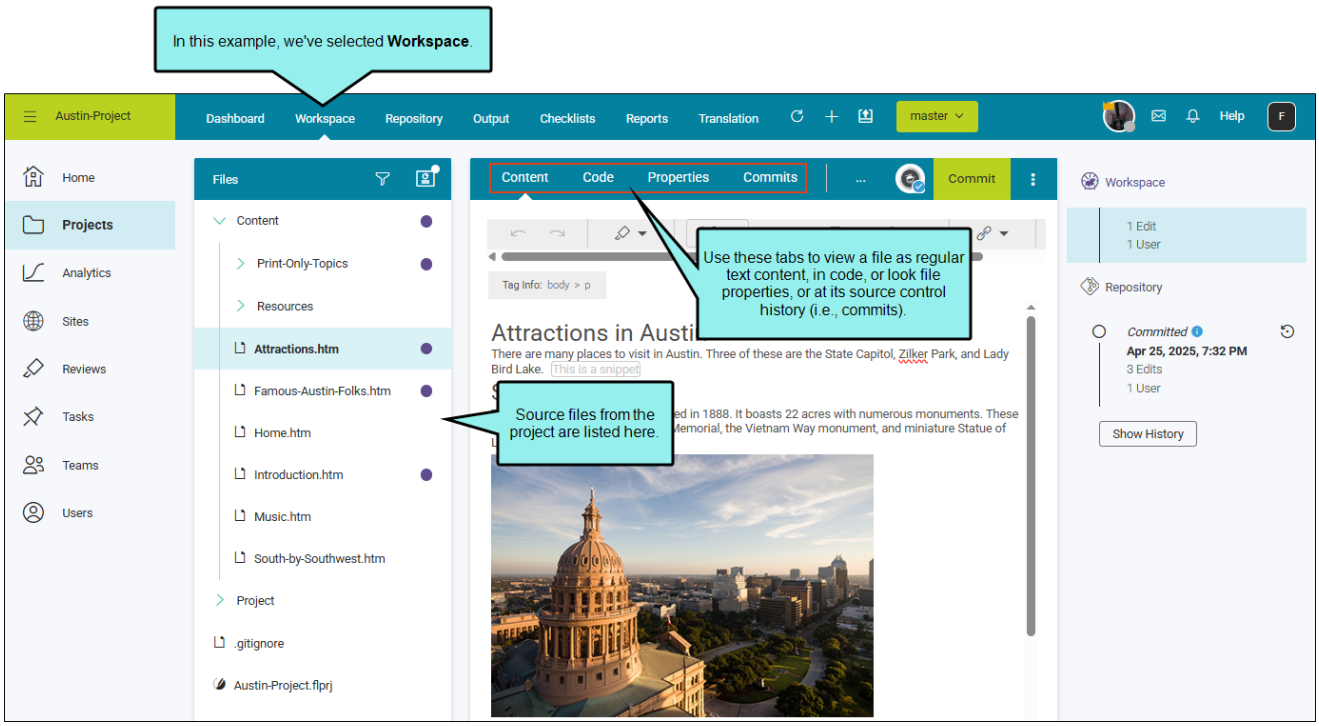
Once you are associated with a project in Flare Online, you can open it from the main Projects page by clicking on the project name.

When you first open a project in Flare Online, it displays by default in Dashboard view. As with your Home dashboard, it will be empty at first. You can populate each project dashboard with widgets that you find useful. See "Widgets" on page 61.



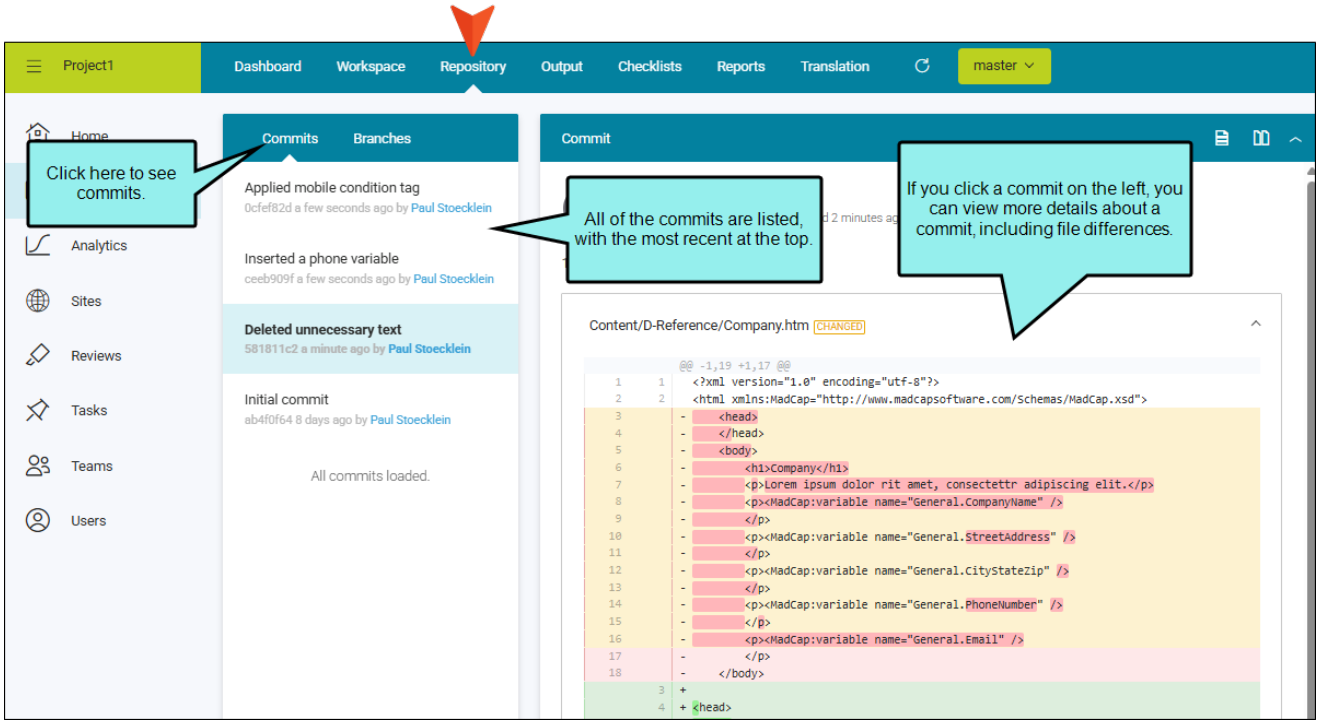
Workspace

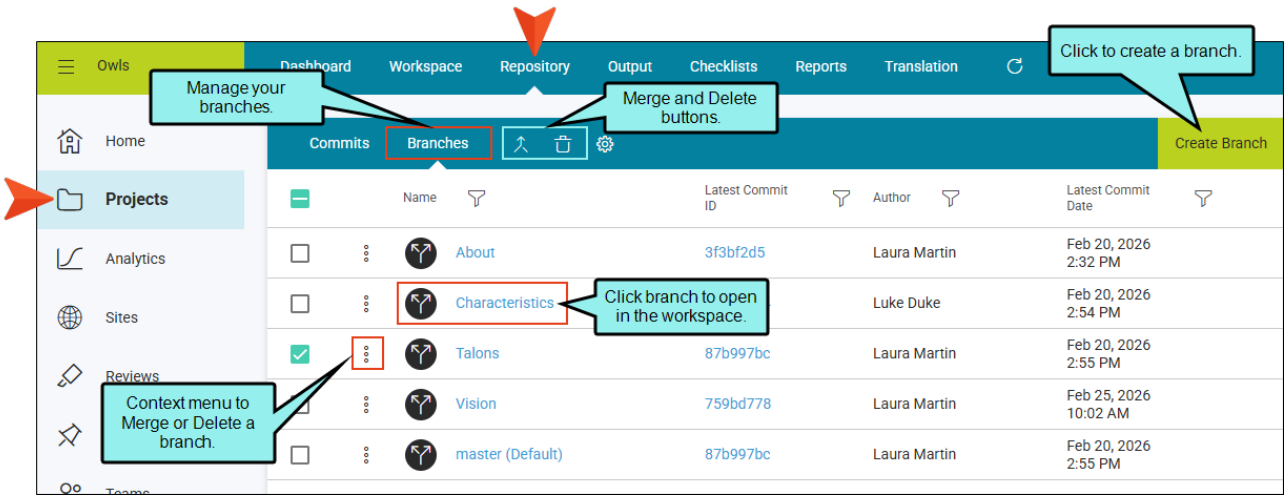
You can click **Workspace** at the top of the interface to view, edit, and author files in your project.



Repository

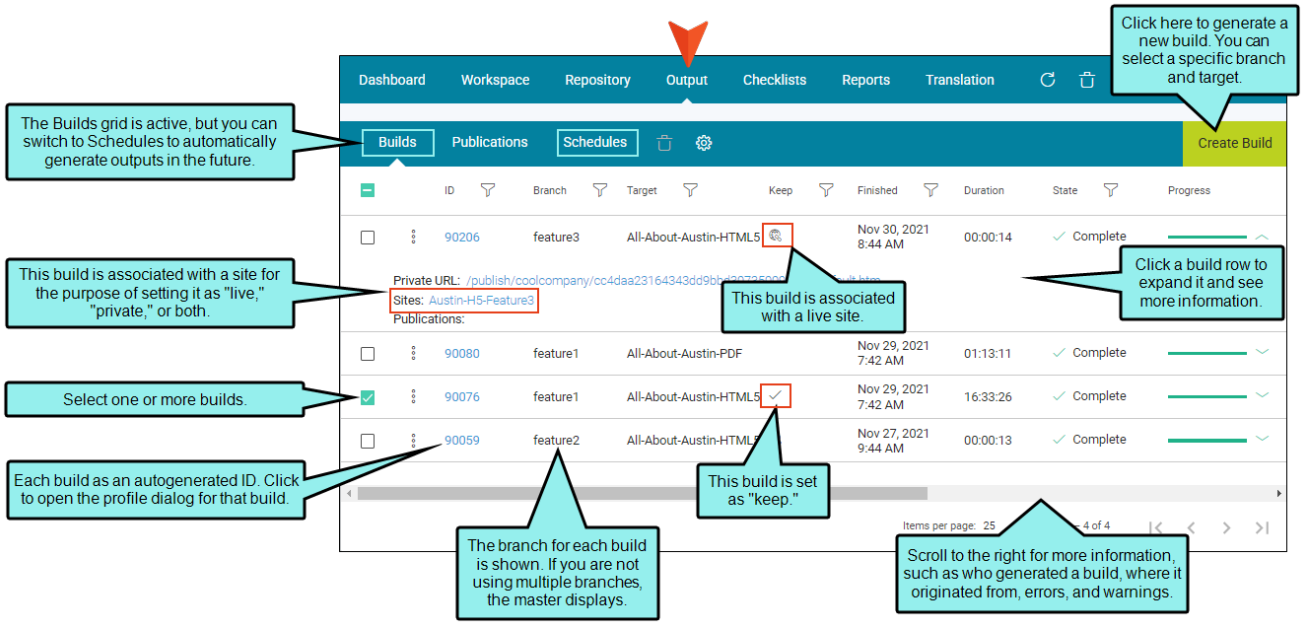
Since Flare Online is a Git-based cloud platform, it is a remote repository. You can click **Repository** at the top of the interface to see two grids, Commits and Branches. A commit is a collection of changes that are pushed to a project's repository, and a branch is a pointer to a snapshot of your changes. The repository provides details of all the source control changes that have taken place over time for the project.

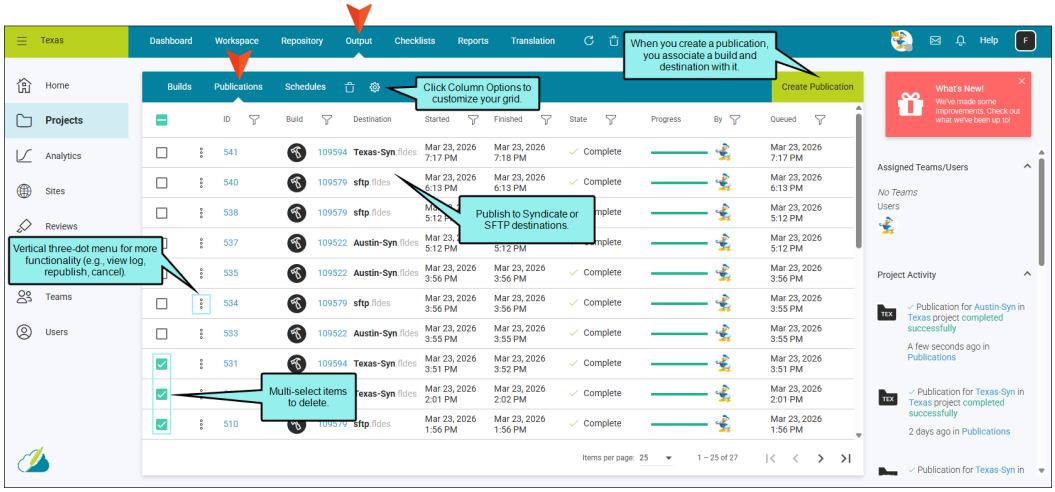



Owls
Dashboard
Workspace
Repository
Output
Checklists
Reports
Translation
Click to create a branch.
Manage your branches.
Merge and Delete buttons.
Home
Projects
Analytics
Sites
Reviews
Commits
Branches
Create Branch
Name
Latest Commit ID
Author
Latest Commit Date
About
3f3bf2d5
Laura Martin
Feb 20, 2026 2:32 PM
Characteristics
Luke Duke
Feb 20, 2026 2:54 PM
Click branch to open in the workspace.
Talons
87b997bc
Laura Martin
Feb 20, 2026 2:55 PM
Context menu to Merge or Delete a branch.
Vision
759bd778
Laura Martin
Feb 25, 2026 10:02 AM
master (Default)
87b997bc
Laura Martin
Feb 20, 2026 2:55 PM

Output

You can click **Output** at the top of the interface to work with the targets in the project. The Output view lets you generate builds, publish to locations outside of Flare Online, and manage various aspects of the project's output. To set output as "live" (i.e., it can be viewed by the public) or configure domains (URLs), you can use the Sites page (see "Sites" on page 41).

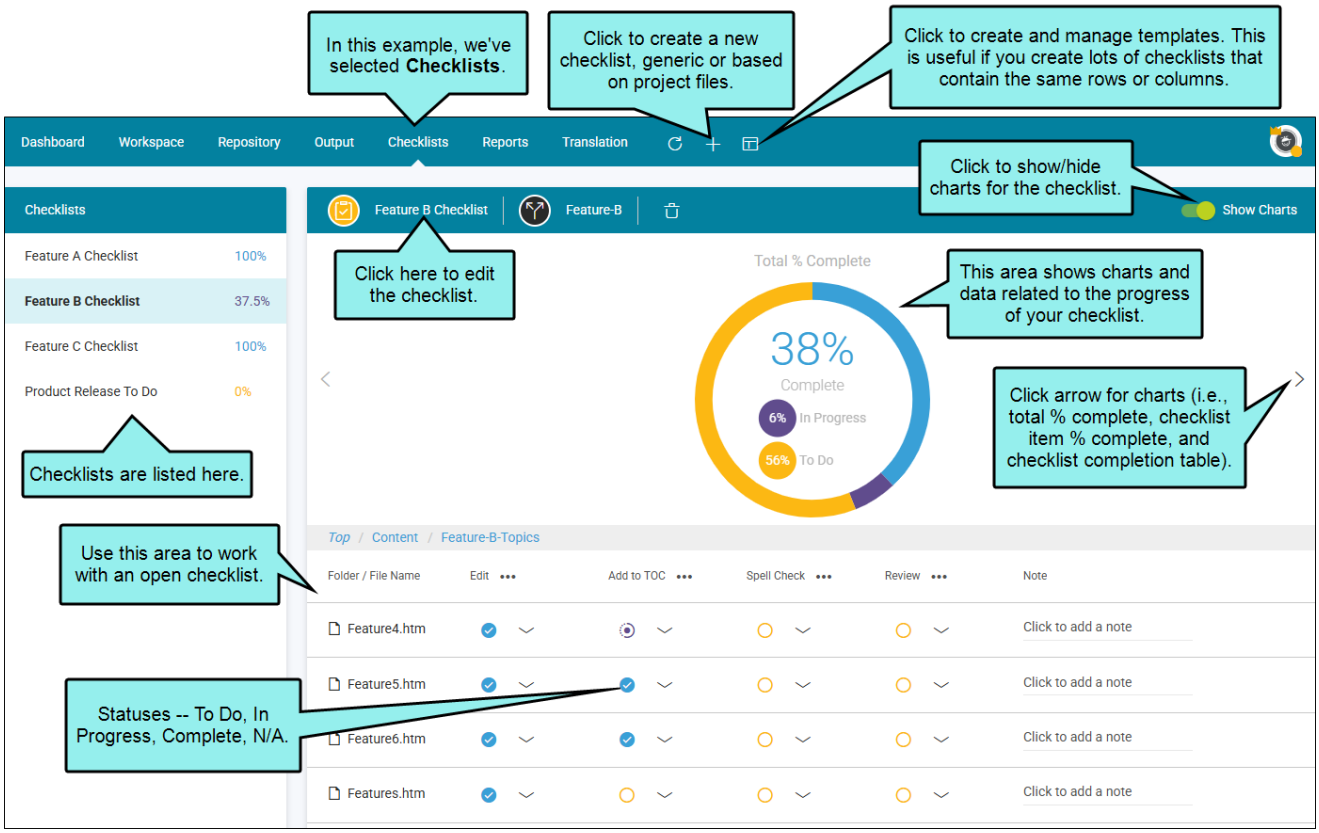




Checklists

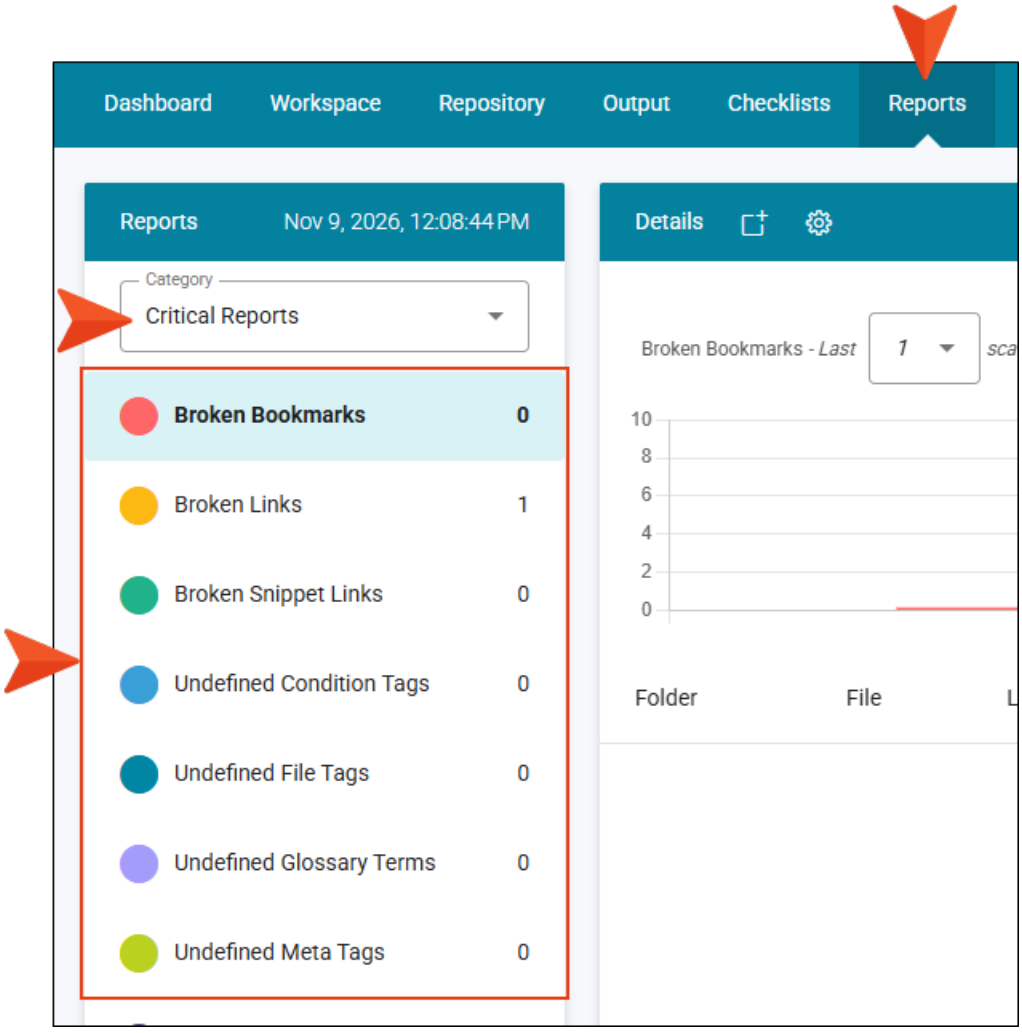
You can click **Checklists** at the top of the interface to create and manage checklists related to your project.

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



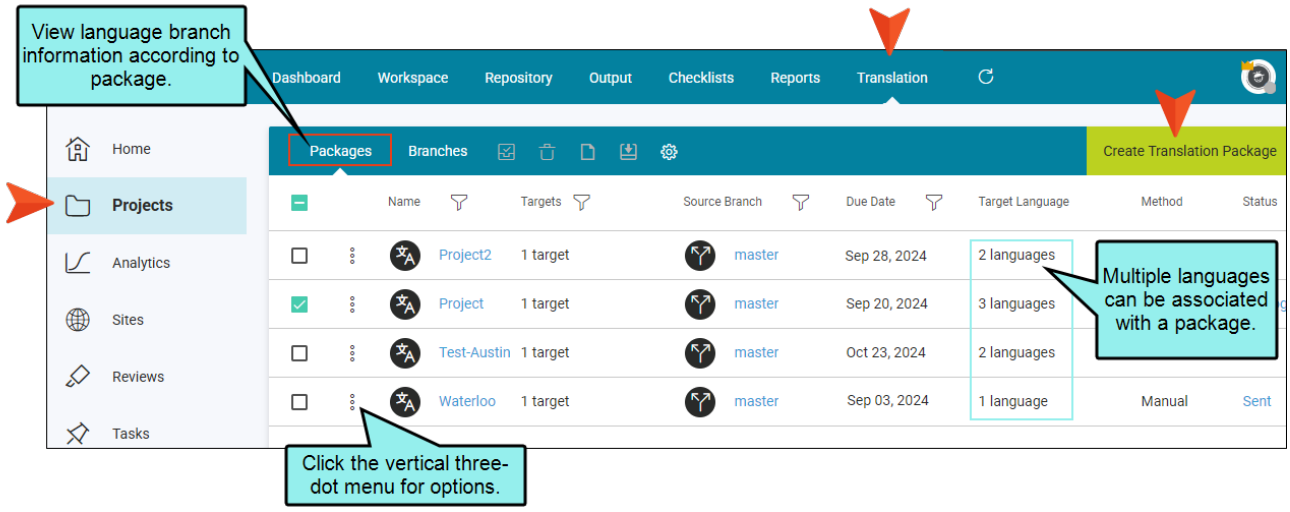
Reports

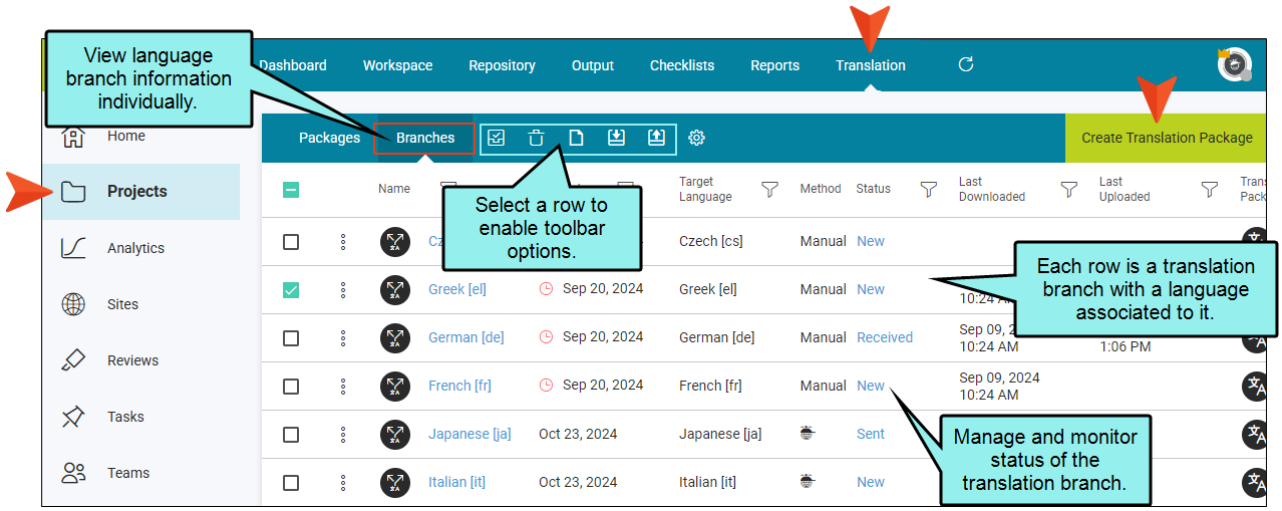
After opening a project in Flare Online, you can click **Reports** at the top of the interface to see various types of reports and statistics on files to help you detect issues. When you select a report or statistical category on the left, a chart and grid are populated on the right with details. If you are working with multiple branches, you can select any branch (e.g., master branch, or feature branch) to base report data on for the scan.



Translation

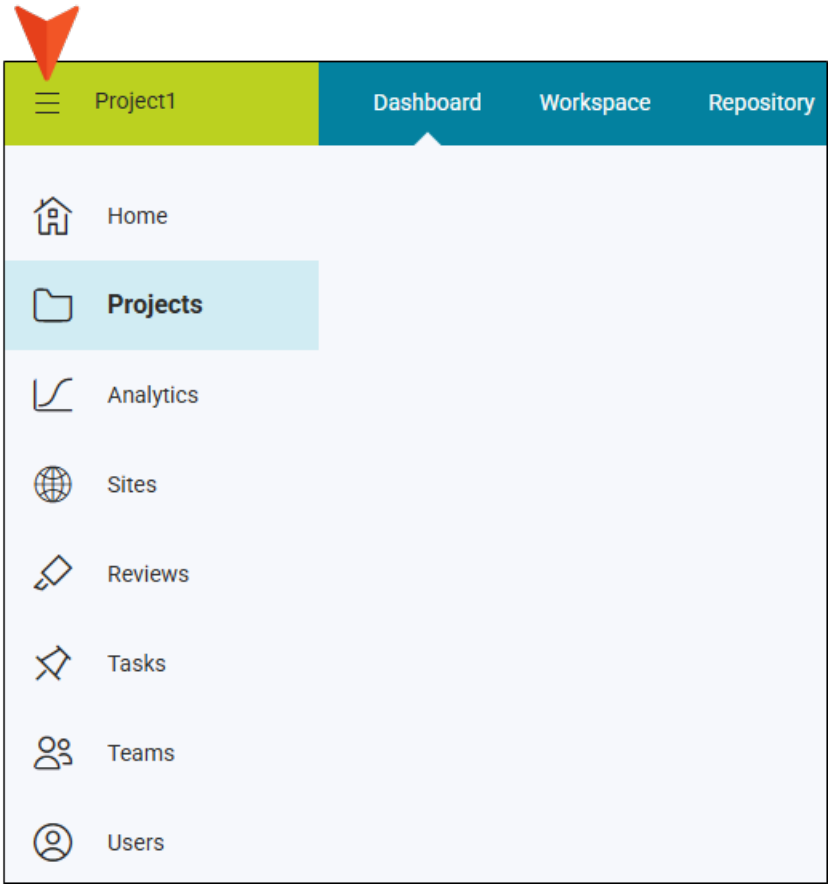
You can click **Translation** at the top of the interface to begin the translation process and to control your multilingual projects. The Translation page includes two grids, Packages and Branches. Functionally, the grids do the same things, but they each provide a different way to view the translation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



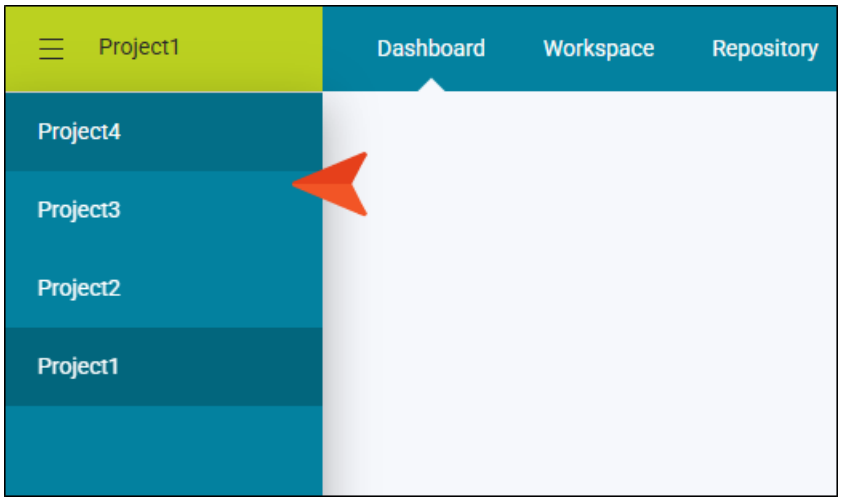


Accessing Other Projects

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



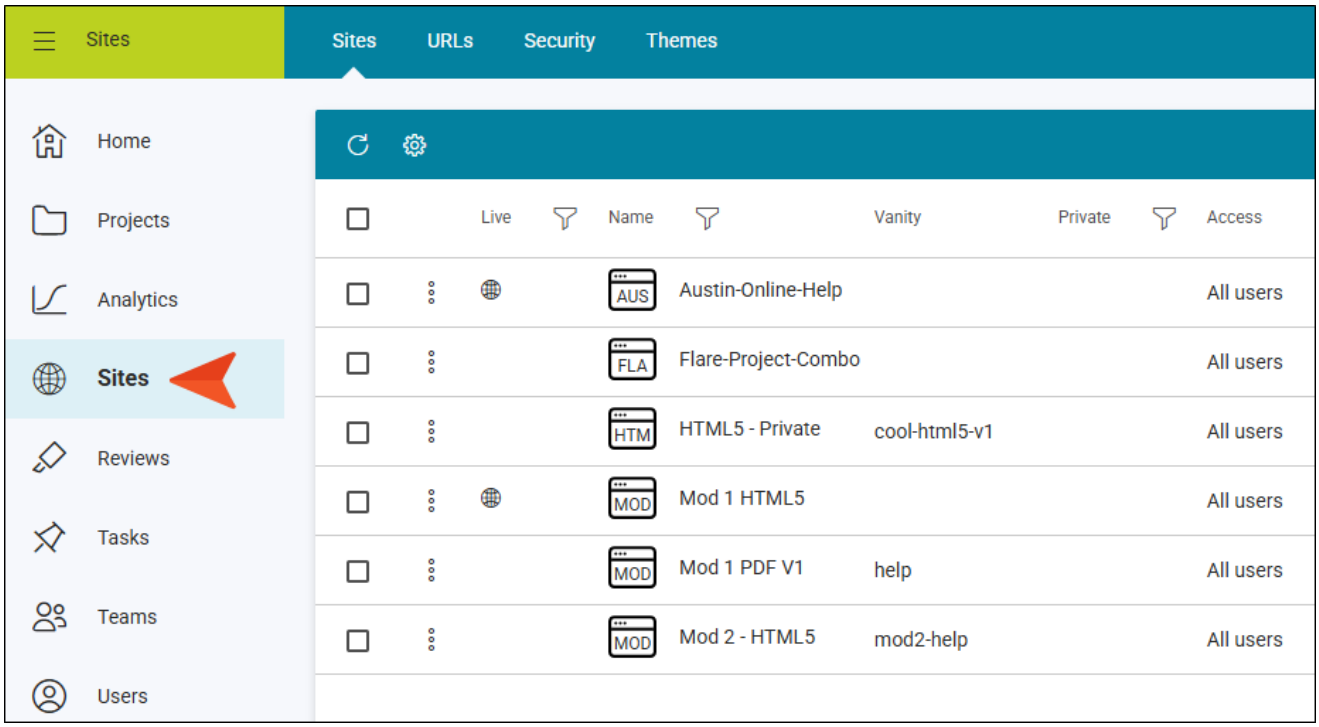
From this drop-down, you can quickly navigate to any other projects that you have permission to open. This is quicker than going back to the main Projects page grid to open another project.



CHAPTER 6

Sites

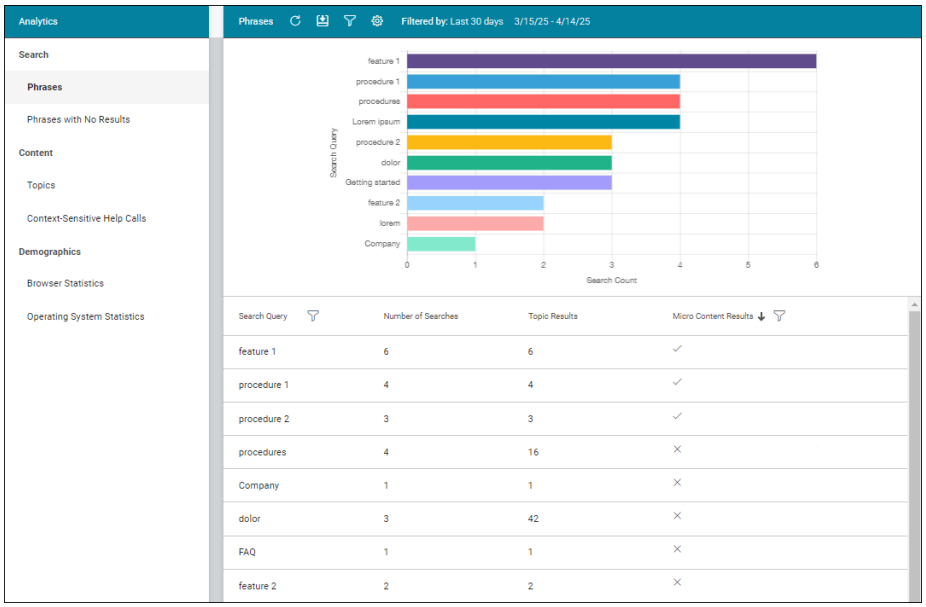
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Four page views are available: Sites, URLs,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



CHAPTER 7

Analytics

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

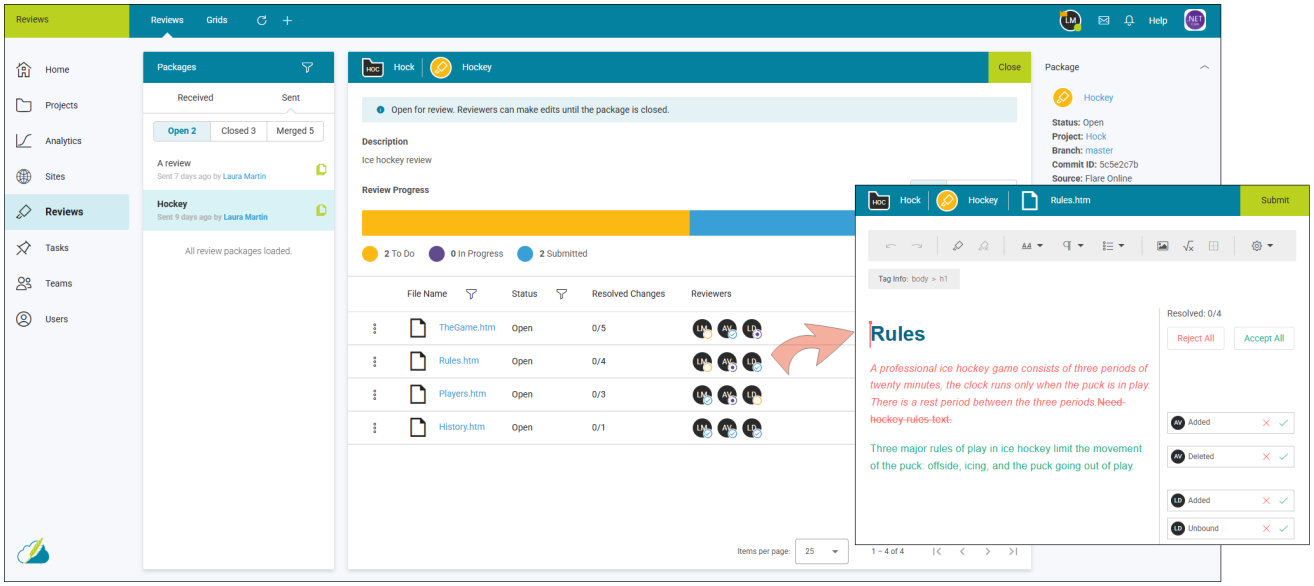


Analytics works on projects located in Flare Online, or you can host output on your own servers. If you host the output outside of Flare Online, you still need to use Flare Online with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Flare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

CHAPTER 8

Reviews

The Reviews page lets owners (or authors) create review packages on a particular branch and send them to reviewers for editing. Reviewers can open files for review, modify them in the Review Editor, and submit the files back. Owners can make decisions about file level tracked changes, resolve edits in real-time collaboration, monitor review activity with grids (e.g., who is reviewing, status of files), and merge files into the workspace to ultimately close the review loop. This is a thorough review process from start to finish in the browser, and lets teams efficiently incorporate reviewed changes into projects and finalize content faster.



Benefits of this review workflow include:

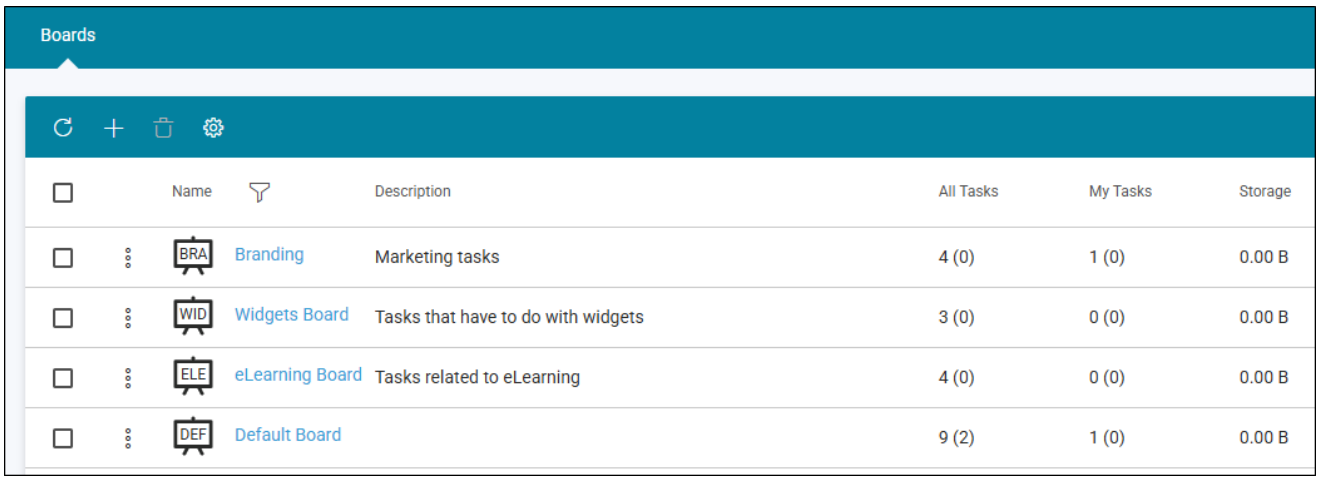
- Cloud Review SMEs do not need to download and install any software. The review takes place in the cloud.
- Multi-User Editing Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- Review-Only Interface A lightweight version of the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

CHAPTER 9

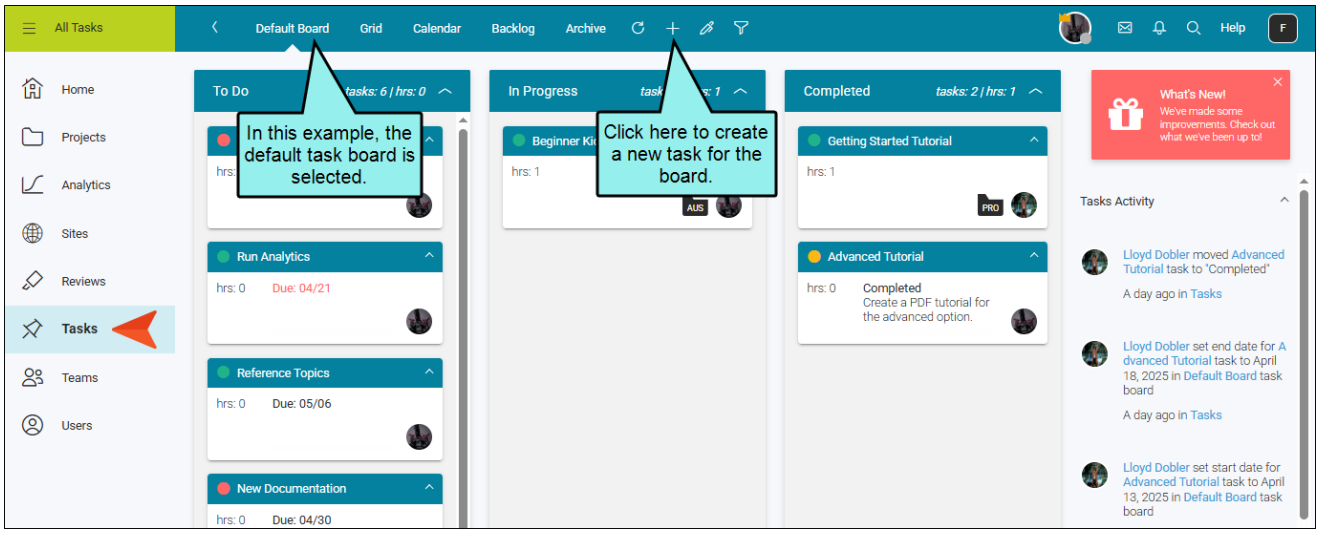
Tasks

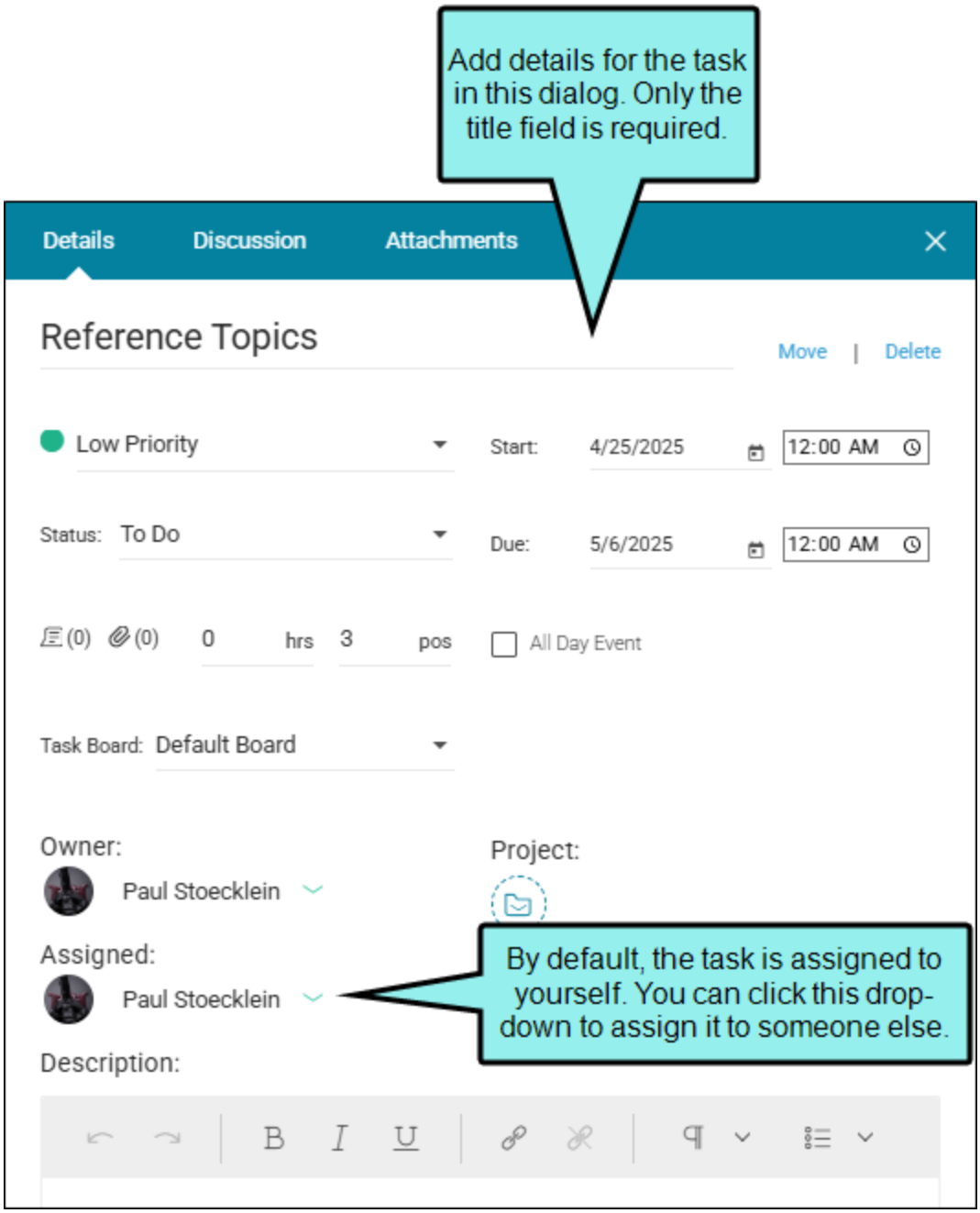
Before creating any tasks, you must first have a task board to hold the tasks. In Flare Online, you can create multiple task boards. This lets you organize tasks according to projects or certain time periods (e.g., product releases).

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

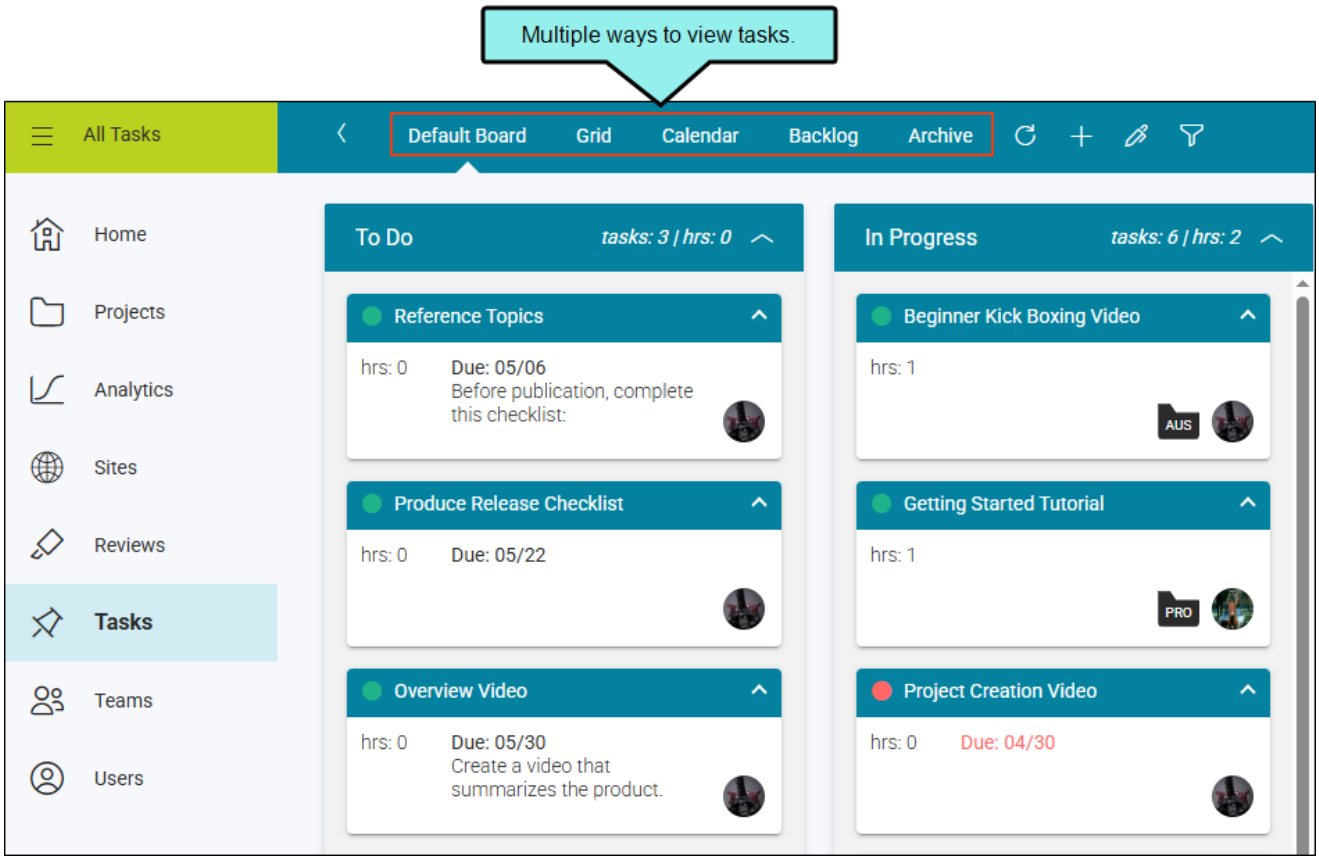


The Tasks page lets you keep track of work that needs to be completed and visualize the work flow. When creating a task board and then tasks within it, you can provide various kinds of information.




Add details for the task in this dialog. Only the title field is required.
Details
Discussion
Attachments
Reference Topics
Move | Delete
Low Priority
Start: 4/25/2025 12:00 AM
Status: To Do
Due: 5/6/2025 12:00 AM
(0) (0) 0 hrs 3 pos All Day Event
Task Board: Default Board
Owner:
Paul Stoecklein
Project:
Assigned:
Paul Stoecklein
By default, the task is assigned to yourself. You can click this drop-down to assign it to someone else.
Description:

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



This chapter discusses the following:

Board 49

Grid 55

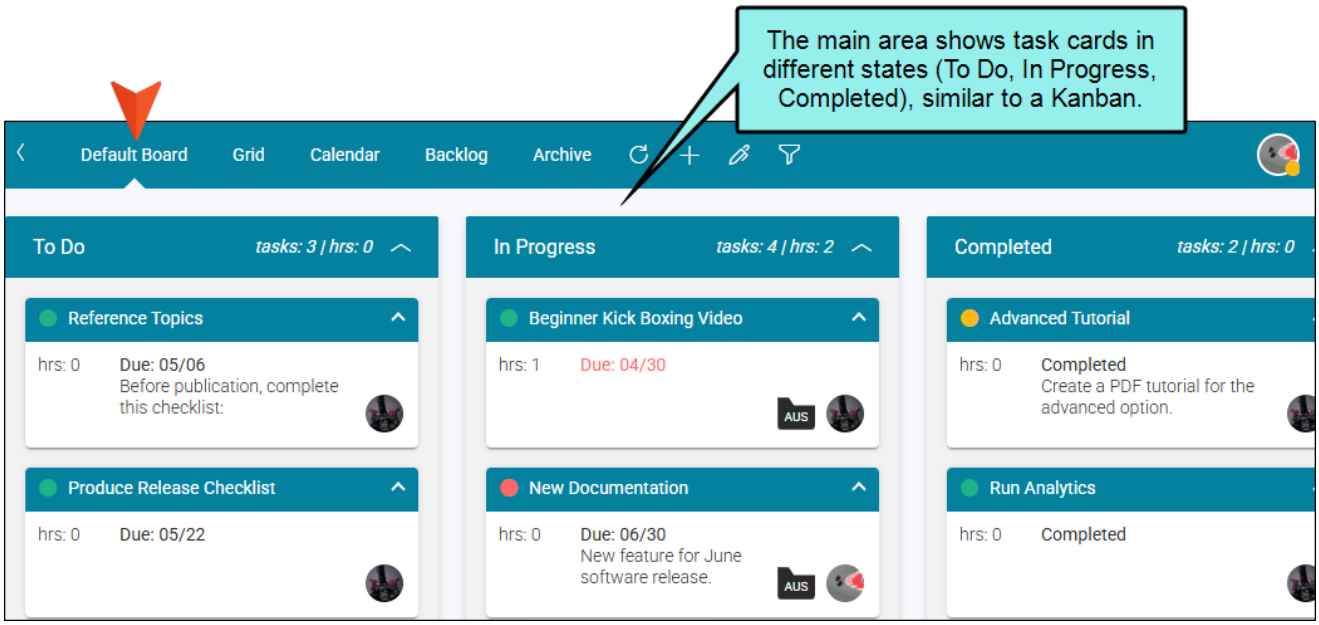
Calendar 56

Backlog 59

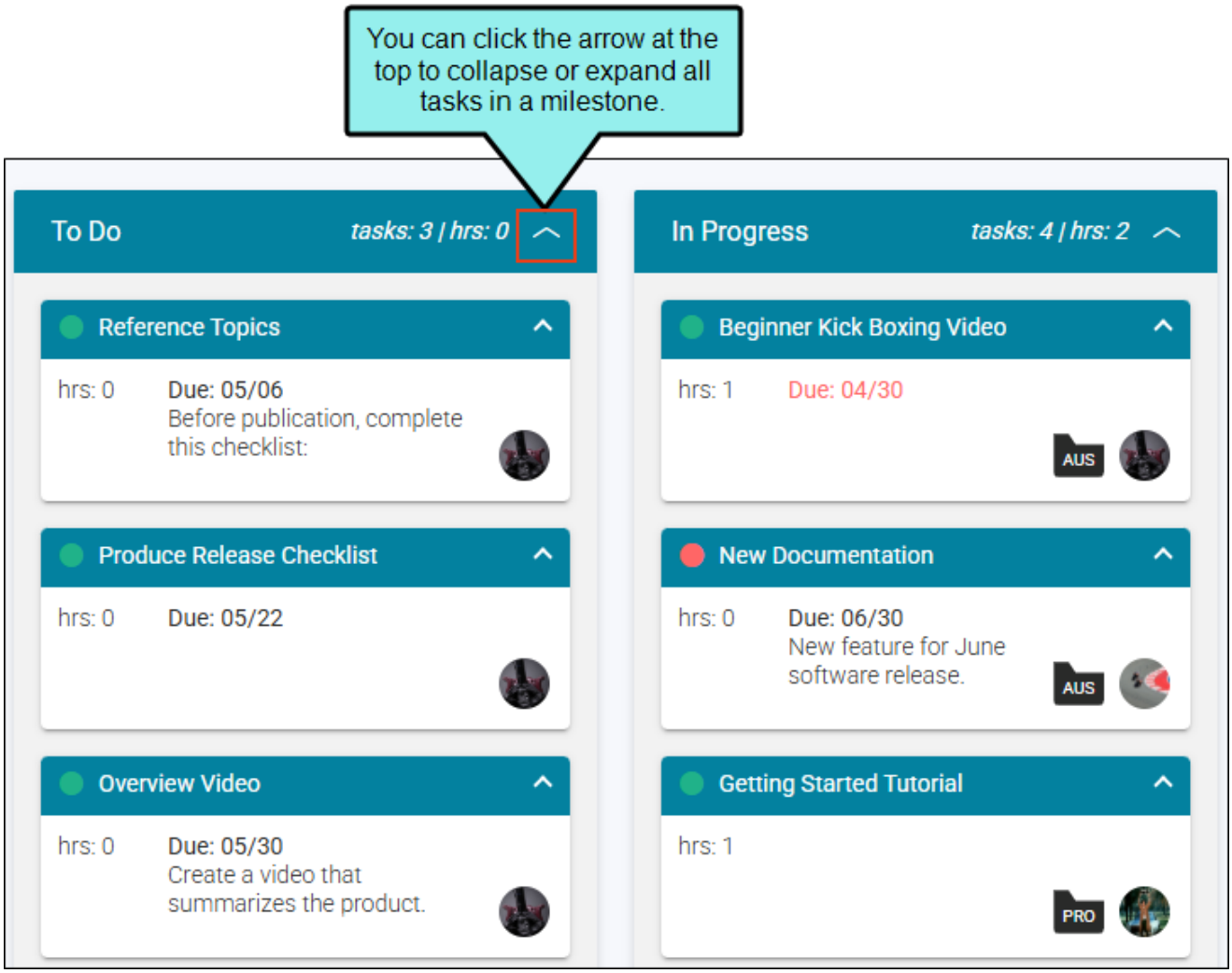
Archive 60

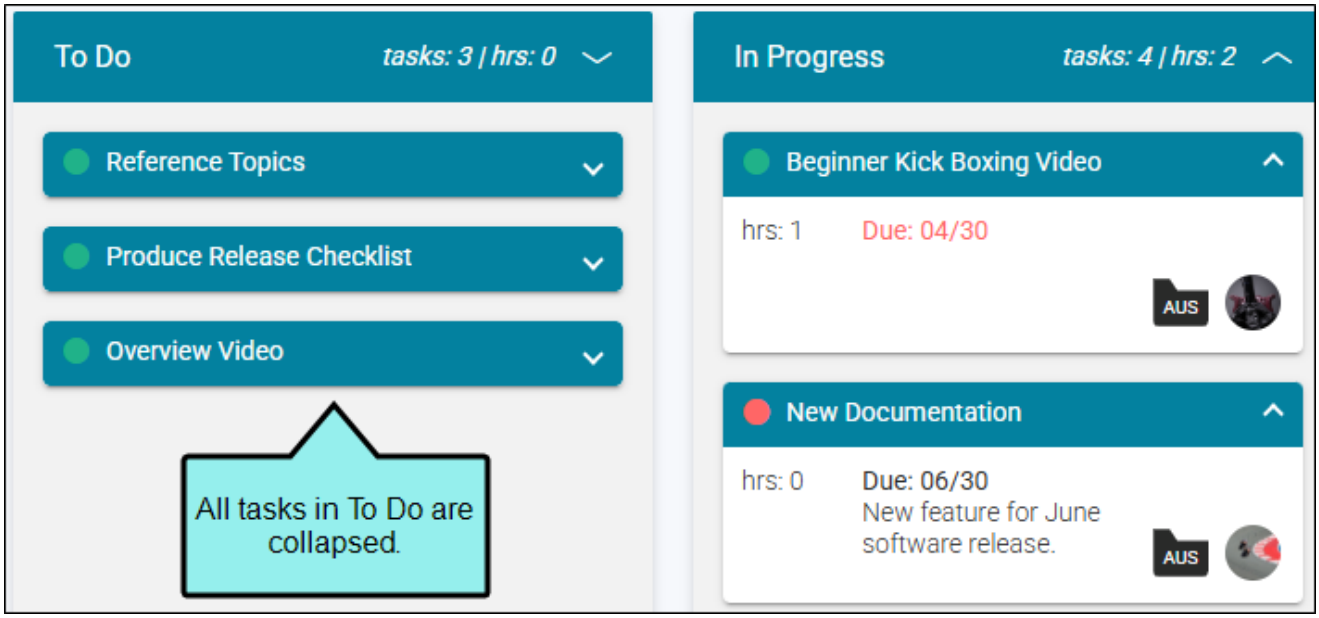
Board

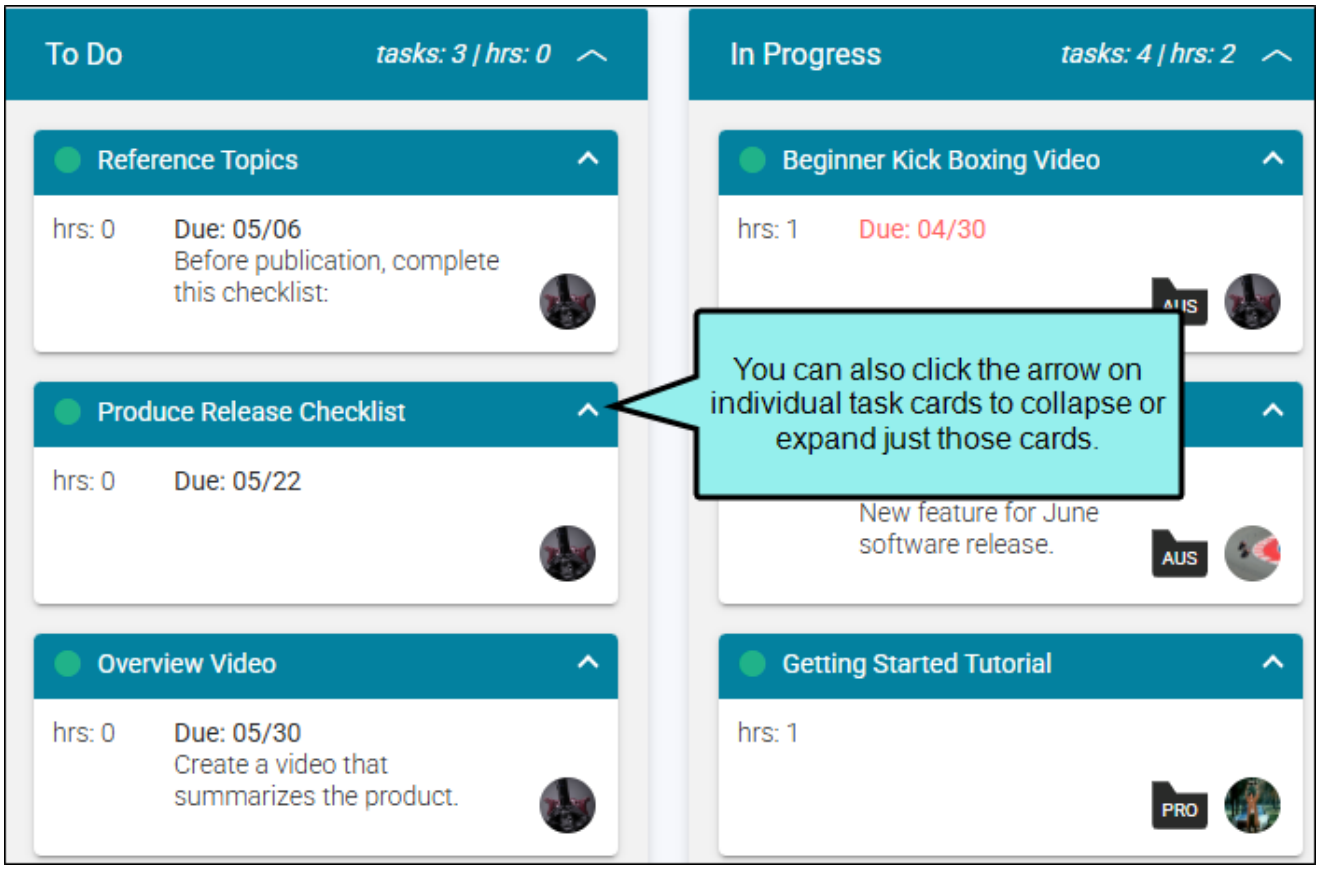
The task board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to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

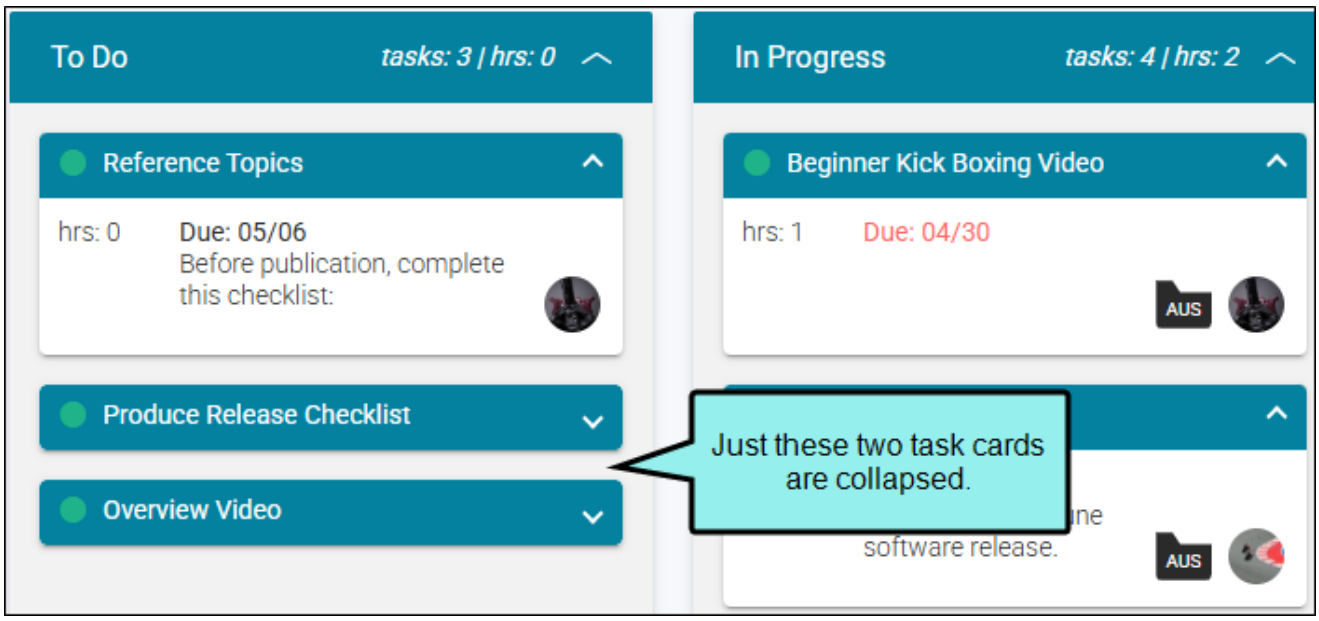


You can collapse and expand any or all cards. This lets you view more task cards on the screen.

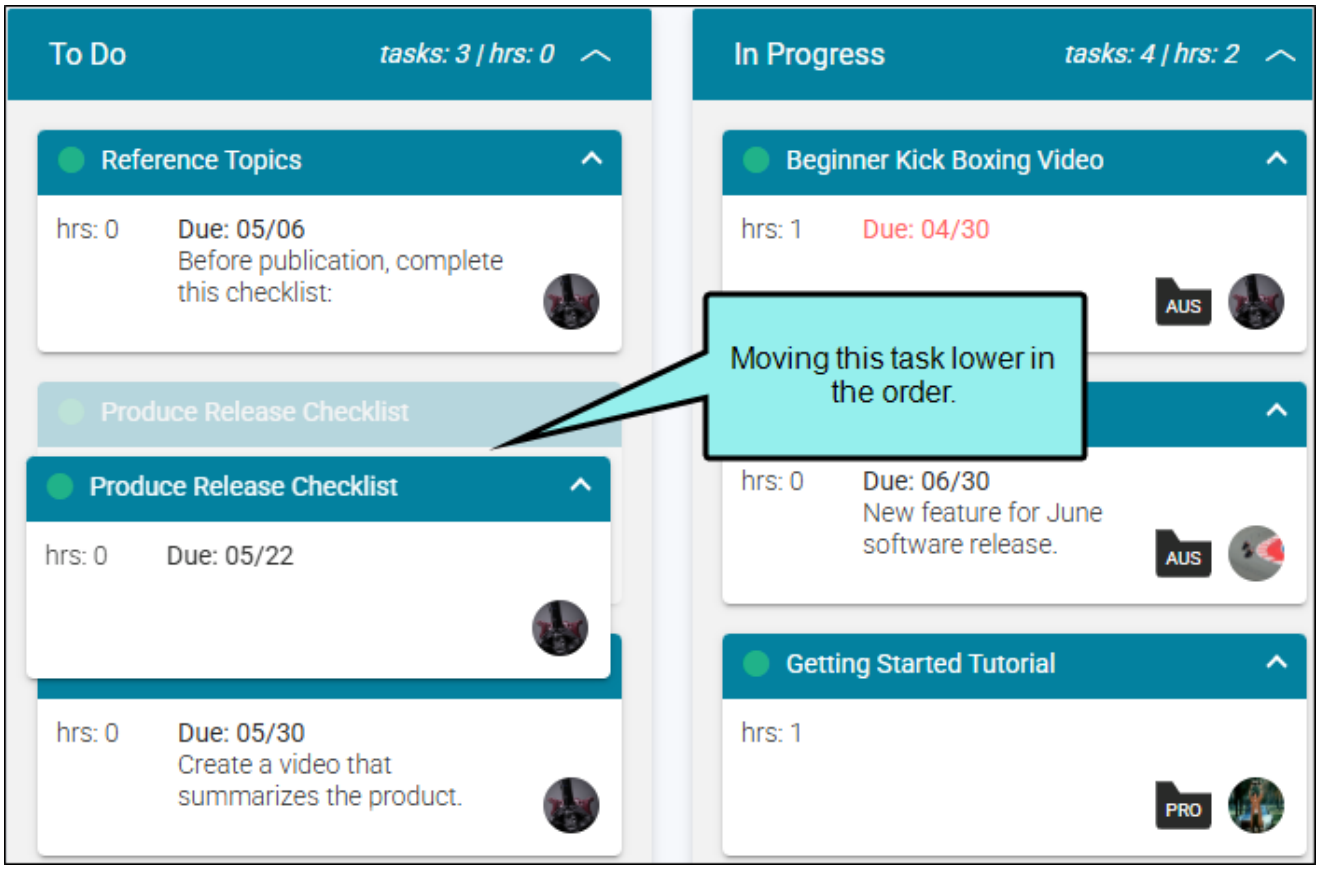


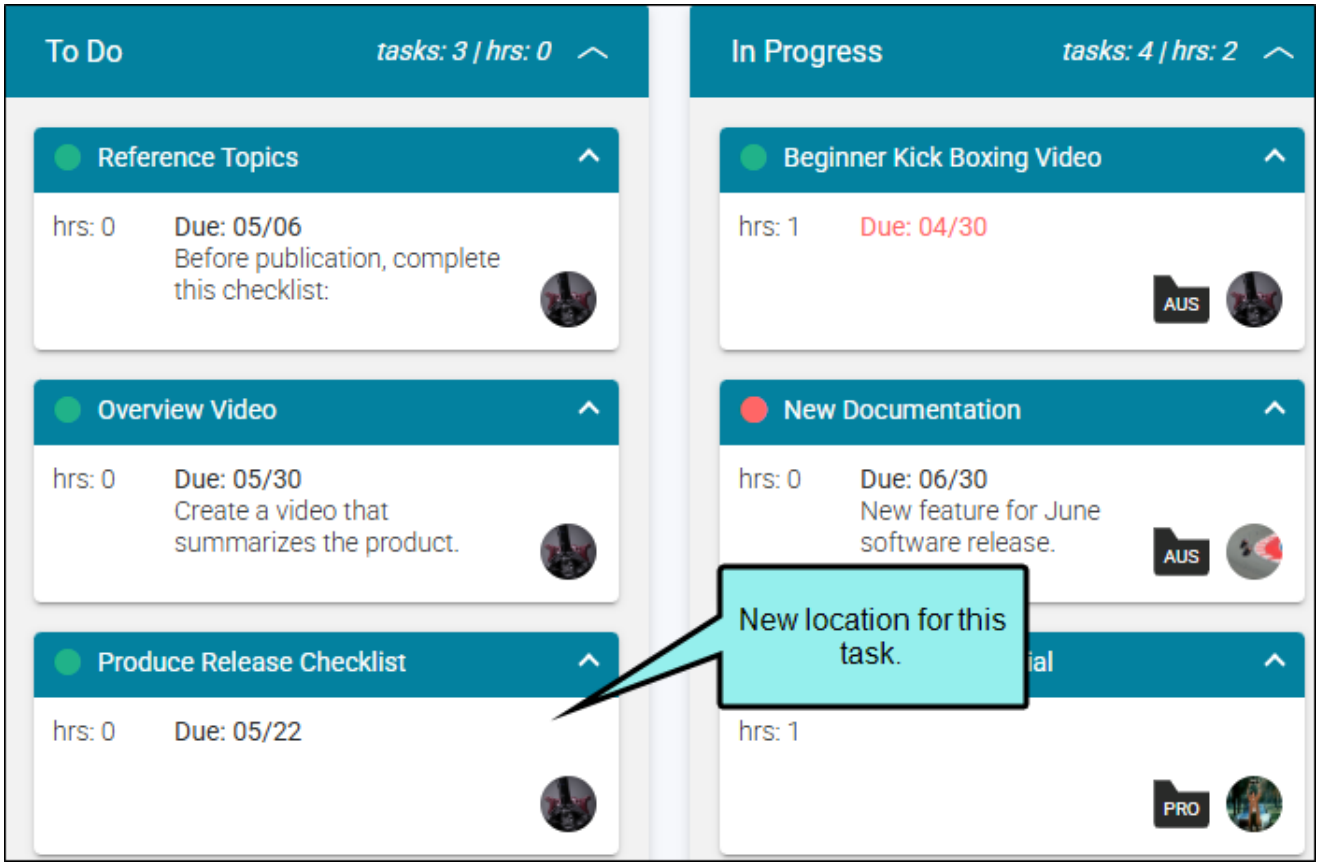

To Do
tasks: 3 | hrs: 0
Reference Topics
Produce Release Checklist
Overview Video
All tasks in To Do are collapsed.
In Progress
tasks: 4 | hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
New Documentation
hrs: 0
Due: 06/30
New feature for June software release.
AUS


To Do
tasks: 3 | hrs: 0
Reference Topics
hrs: 0
Due: 05/06
Before publication, complete this checklist:
Produce Release Checklist
hrs: 0
Due: 05/22
Overview Video
hrs: 0
Due: 05/30
Create a video that summarizes the product.
You can also click the arrow on individual task cards to collapse or expand just those cards.
In Progress
tasks: 4 | hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
New feature for June software release.
AUS
Getting Started Tutorial
hrs: 1
PRO


To Do
tasks: 3 | hrs: 0
Reference Topics
hrs: 0
Due: 05/06
Before publication, complete this checklist:
Produce Release Checklist
Overview Video
In Progress
tasks: 4 | hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
software release.
AUS
Just these two task cards are collapsed.

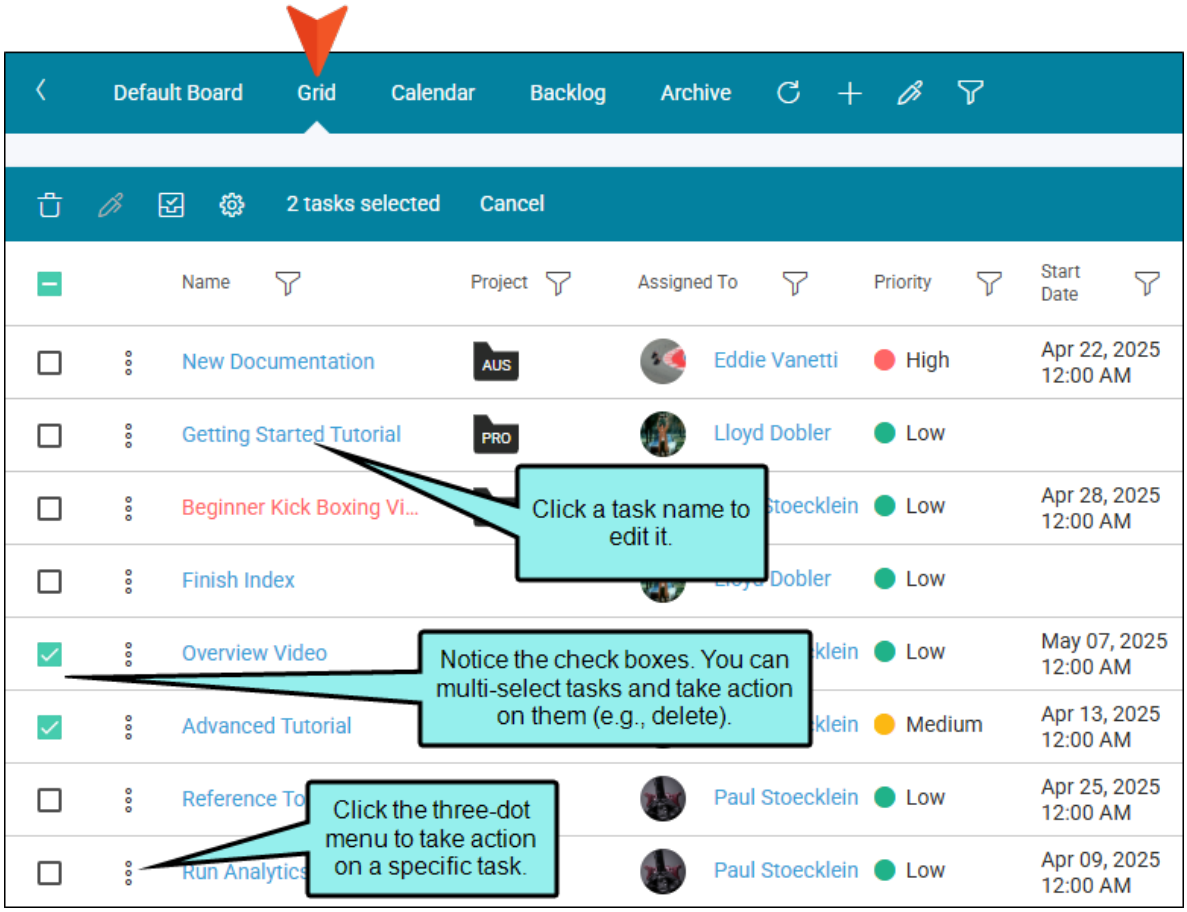
Also, you can customize the order of the tasks within a milestone column by dragging and dropping the cards.




To Do
tasks: 3 / hrs: 0
Reference Topics
hrs: 0
Due: 05/06
Before publication, complete this checklist:
Overview Video
hrs: 0
Due: 05/30
Create a video that summarizes the product.
Produce Release Checklist
hrs: 0
Due: 05/22
In Progress
tasks: 4 / hrs: 2
Beginner Kick Boxing Video
hrs: 1
Due: 04/30
AUS
New Documentation
hrs: 0
Due: 06/30
New feature for June software release.
AUS
New location for this task.
hrs: 1
PRO

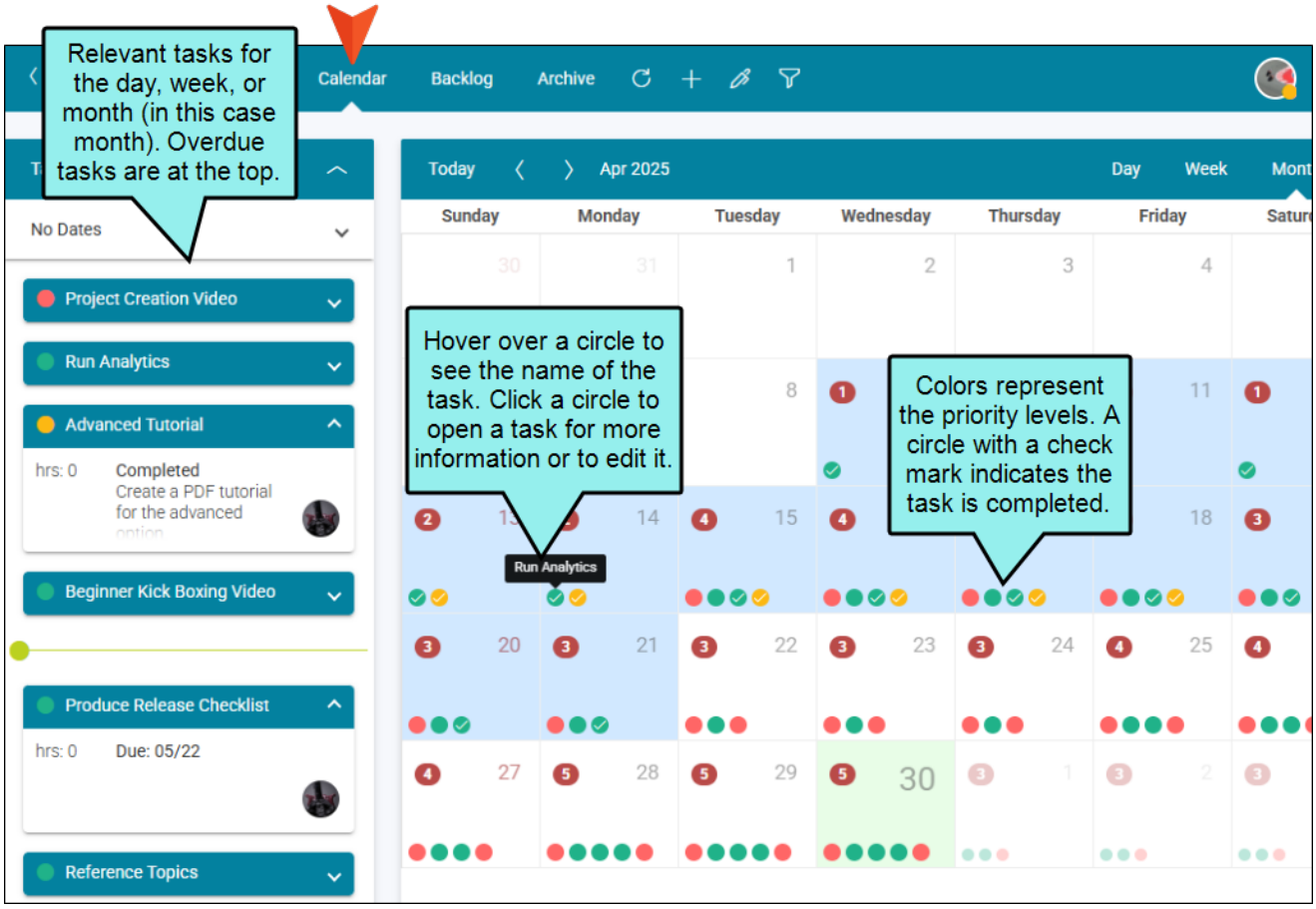
Grid

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



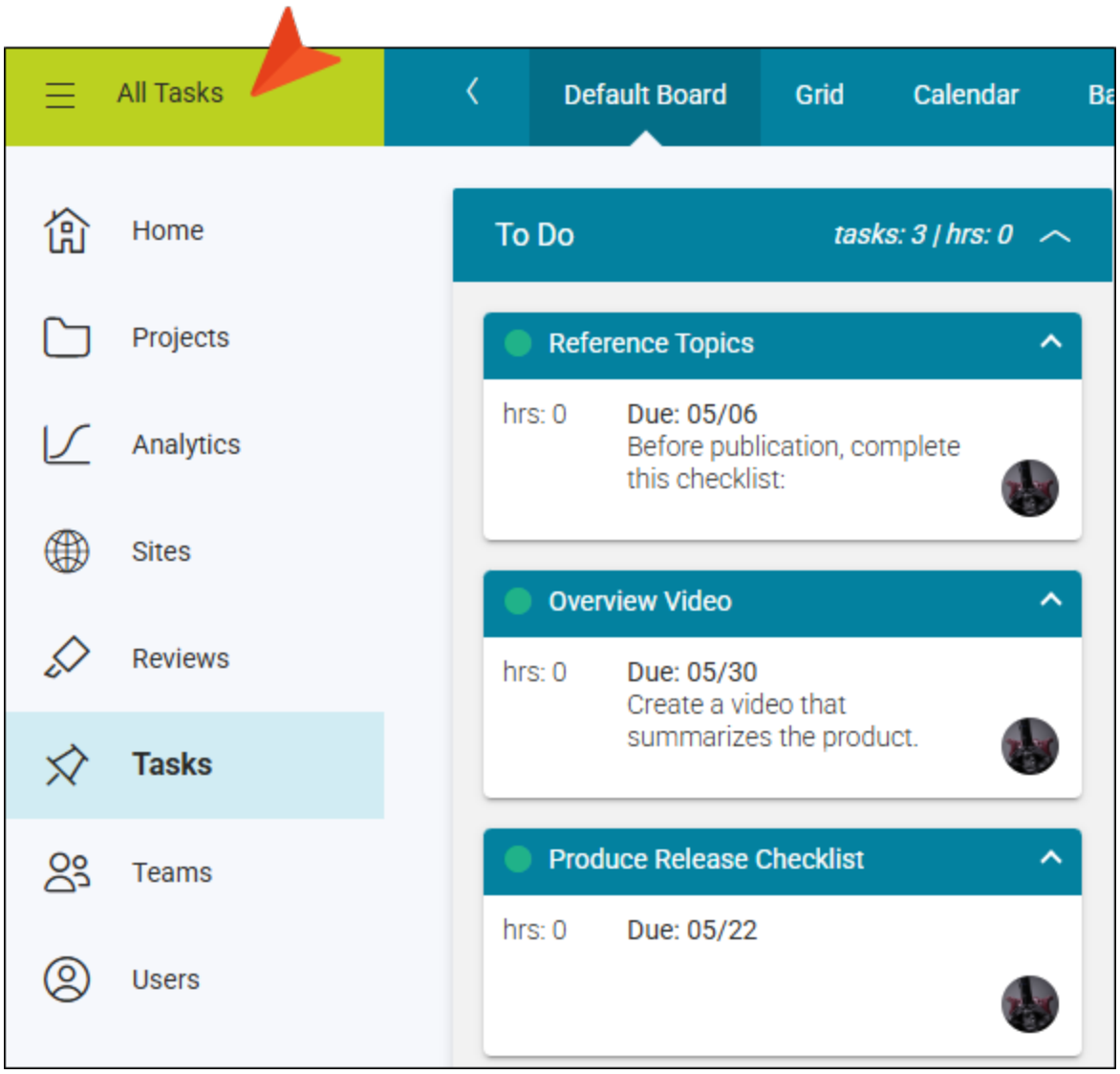
Calendar

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

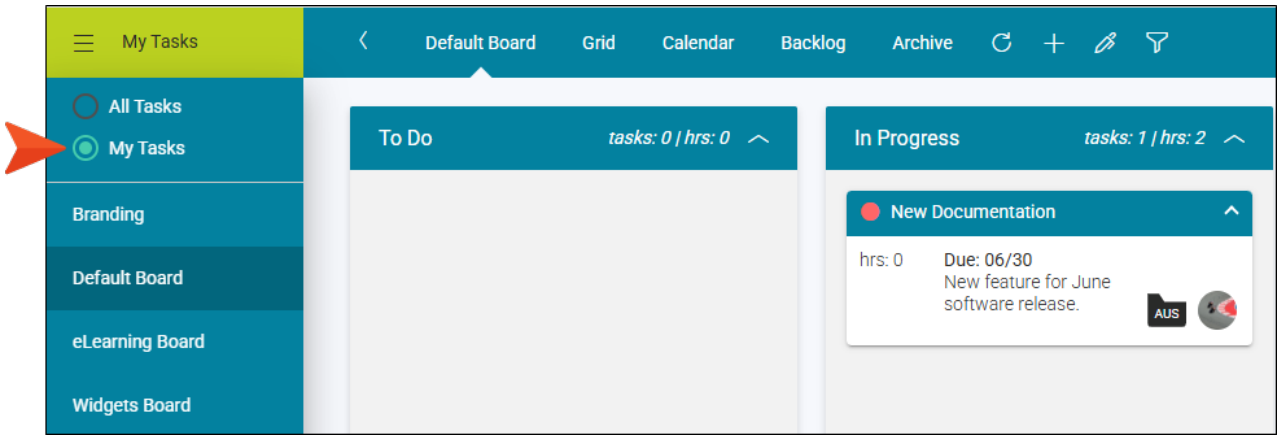


Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and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

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

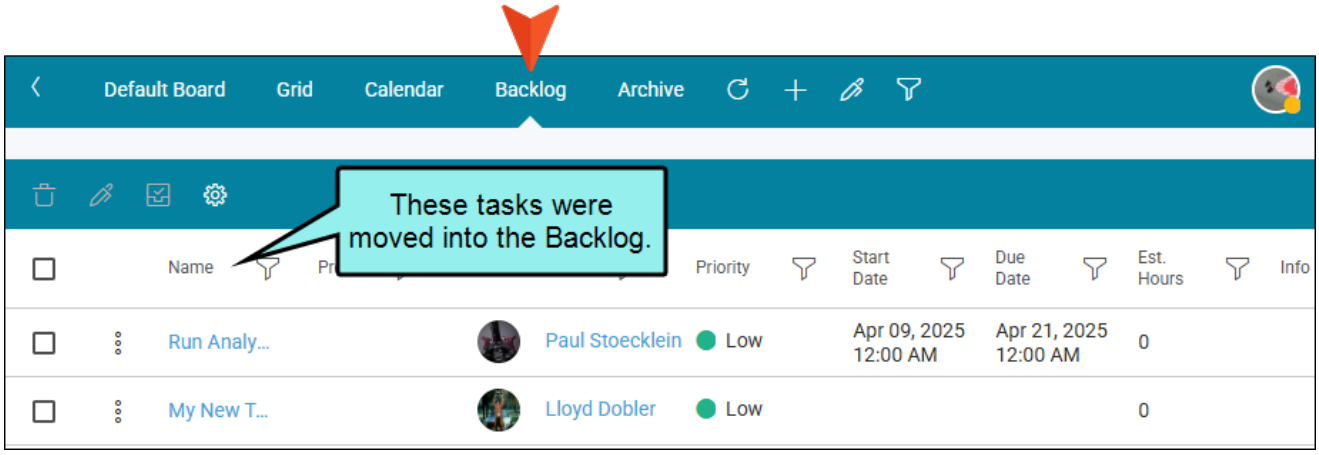


Then, in the flyout menu, you can select My Tasks.



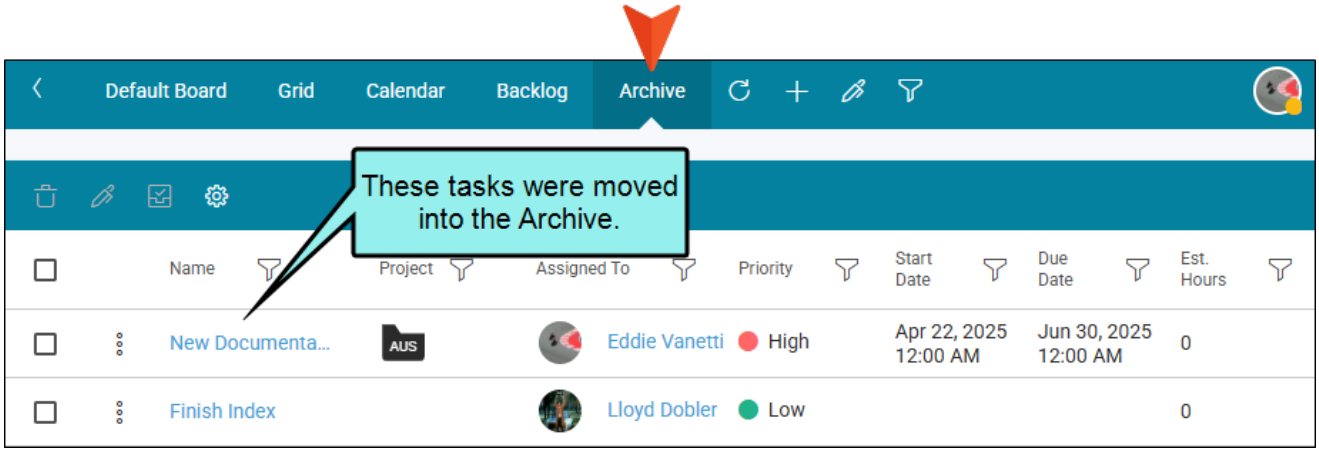
Backlog

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



Archive

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

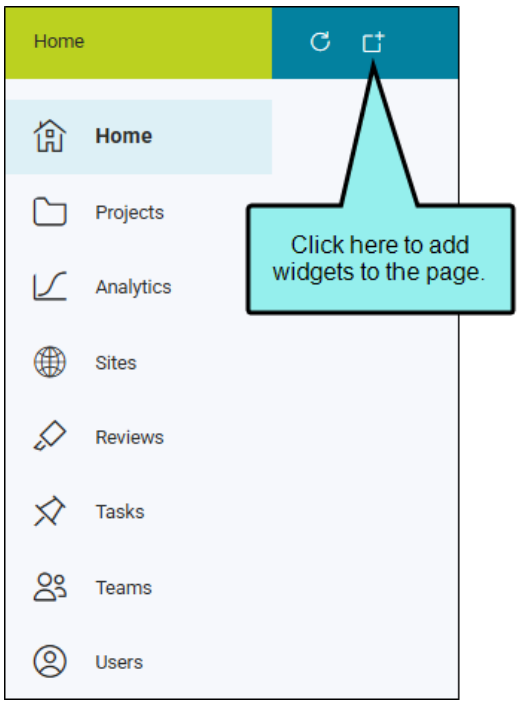


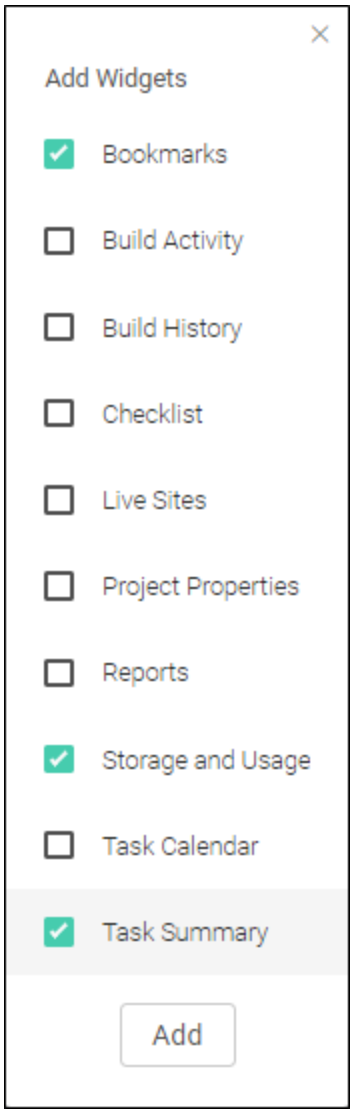
CHAPTER 10

Widgets

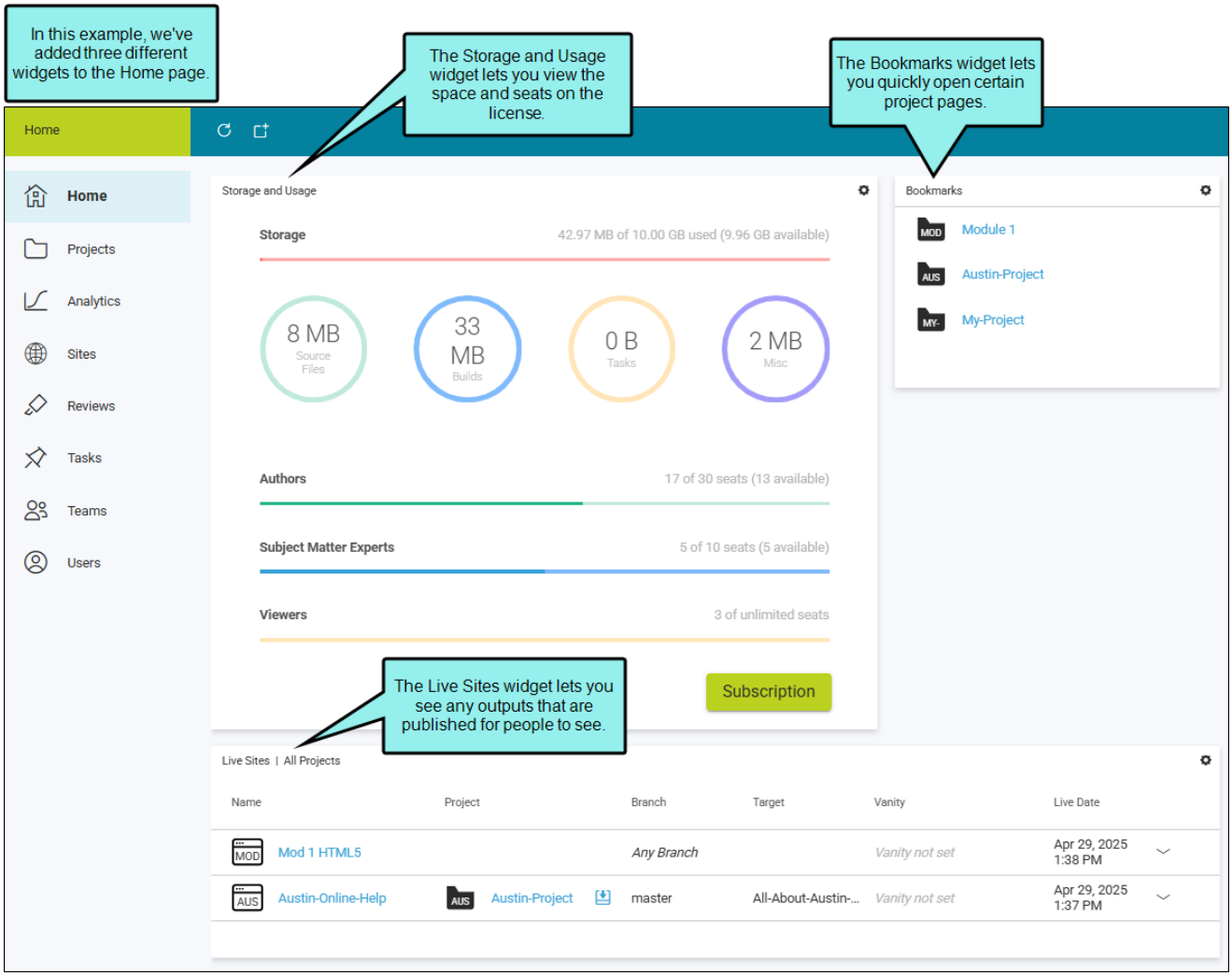
Widgets are standalone information objects that let you see data at a glance and provide quick access to certain areas. You can add widgets for all kinds of information on your Flare Online license.

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



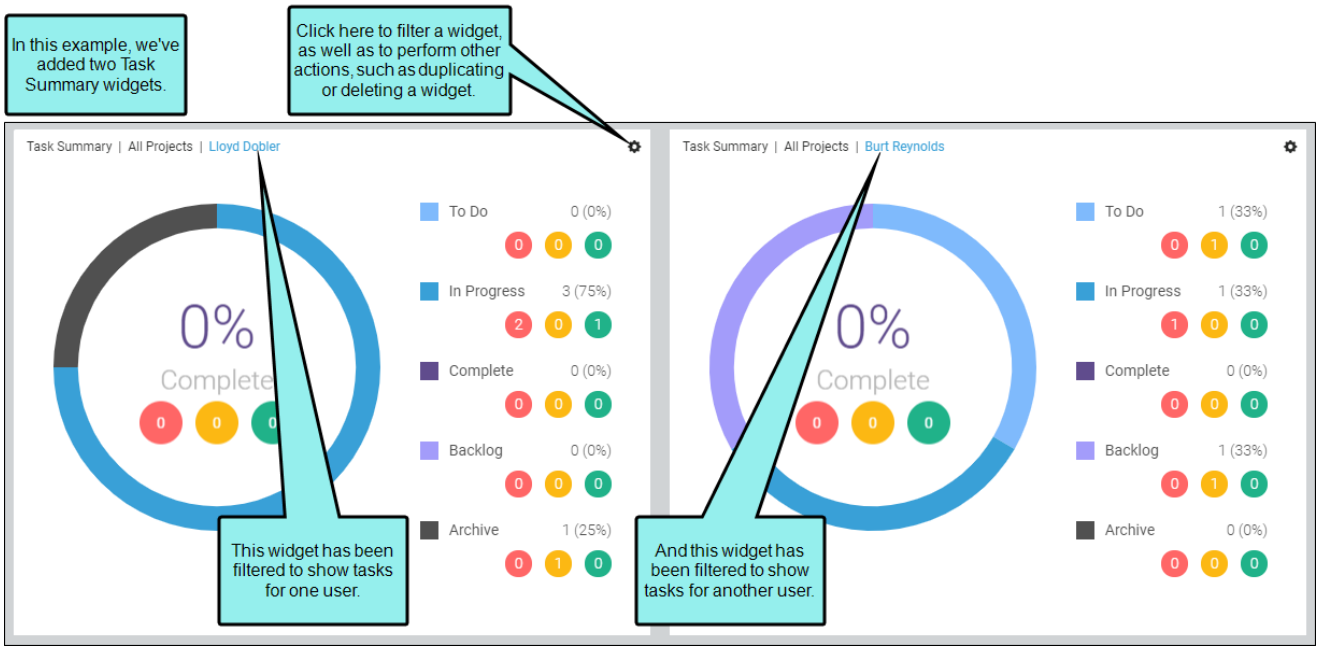

Add Widgets
Bookmarks
Build Activity
Build History
Checklist
Live Sites
Project Properties
Reports
Storage and Usage
Task Calendar
Task Summary
Add

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



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

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



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