madcap software

USER GUIDE

MADCAP FLARE ONLINE

Projects Guide

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

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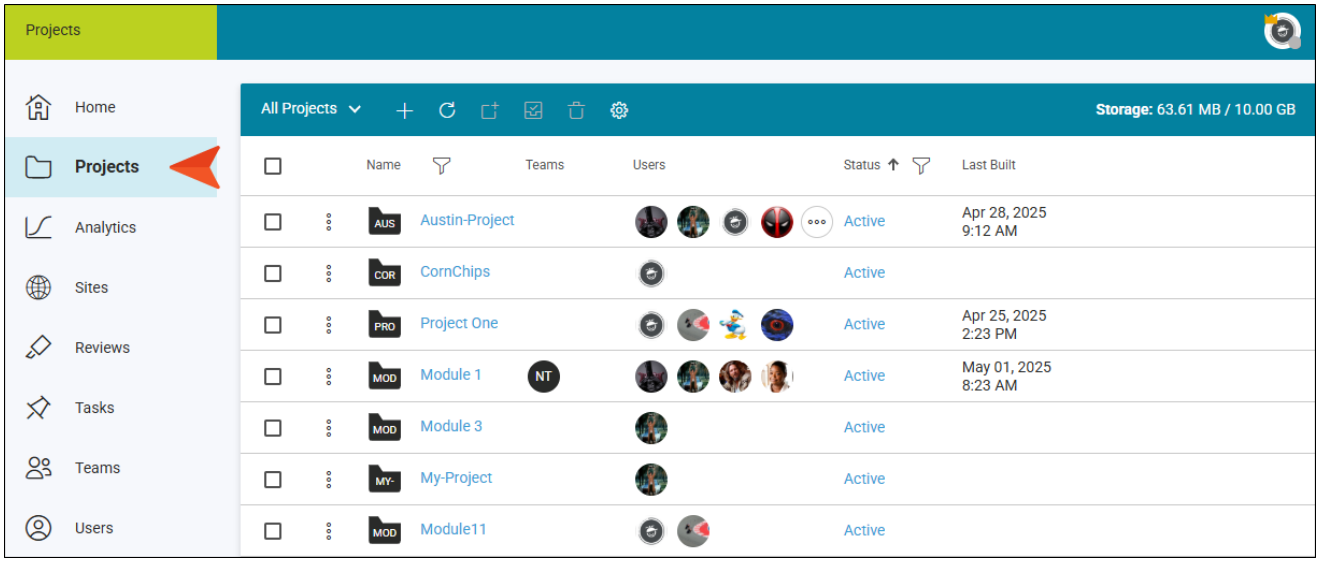
CHAPTER 1

Introduction

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.



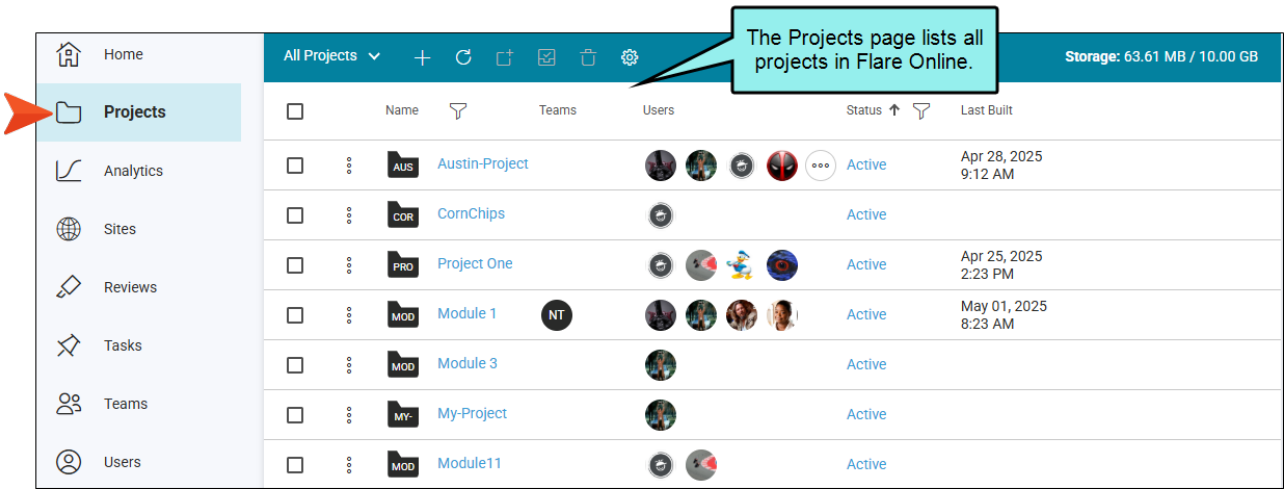
On a smaller screen, the options on the left are opened from a flyout menu.

- "Introduction" on page 7
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CHAPTER 2

Introduction

The first step in developing a project and working with it in Flare Online is to start a project. You can create a project in Flare Online, or upload a project to your Flare Online license from Flare Desktop.



General Information

- "Source Project Templates" on page 9
- "Is It a Flare Online Project or a Flare Desktop Project?" on page 15

Main Activities

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- "Uploading (Binding) Projects" on page 18
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General Information for Starting Projects

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

Source Project Templates

You can choose from many source templates when creating a project in Flare Online.

Online Templates

Template	Characteristics
eLearning	■ Contains starter topics and other files designed for an **eLearning course** in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination. ■ Lets you integrate course output with an external **learning management system (LMS)** for tracking results; supports **SCORM and xAPI**. ■ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Knowledge Base	■ Contains starter topics and other files designed for an **online knowledge base** in HTML5 format. ■ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Template	Characteristics
Side Navigation	■ Contains starter topics and other files intended for online HTML5 output that looks like a **modern website with navigation on the side (left or right)**. ■ Offers a **frameless**, modern alternative to the more traditional tripane format. ■ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Top Navigation	■ Contains starter topics and other files intended for online HTML5 output that looks like a **modern website with navigation on the top**. ■ Offers a **frameless**, modern alternative to the more traditional tripane format. ■ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Tripane	■ Contains starter topics and other files intended for online HTML5 output in a traditional **tripane format (navigation pane, toolbar pane, content pane)**. ■ Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Online and Print Templates

Template	Characteristics
eLearning and PDF	■ Contains starter topics and other files designed for an **eLearning course** in HTML5 format. You can quickly generate a course with simple knowledge checks, another with a gradable quiz, or a combination. ■ Lets you integrate course output with an external **learning management system (LMS)** for tracking results; supports **SCORM and xAPI**. ■ Online HTML5 output allows for **interactivity in learning blocks** (e.g., selecting answers, viewing feedback and test results). Includes **responsive output**, which means the content display changes automatically depending on the width of the screen. ■ PDF output allows for distribution of a print version of the course, with a one-click option to **show or hide answers** in the output.
Side Navigation and PDF	■ Contains starter topics and other files intended for both online and print-based output. ■ Online HTML5 output looks like a **modern website with navigation on the side (left or right)**. Offers a **frameless**, modern alternative to the more traditional tripane format. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.
Top Navigation and PDF	■ Contains starter topics and other files intended for both online and print-based output. ■ Online HTML5 output looks like a **modern website with navigation on the top**. Offers a **frameless**, modern alternative to the more traditional tripane format. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Template	Characteristics
Tripane and PDF	■ Contains starter topics and other files intended for both online and print-based output. ■ Online HTML5 output uses a traditional **tripane format (navigation pane, toolbar pane, content pane)**. Includes **responsive output**, which means the content display changes automatically depending on the width of the screen.

Print Templates

Template	Characteristics
Brochure	■ Contains two topics and two page layouts **designed to create a brochure with three panes**.
Policies and Procedures	■ Contains starter topics and other files **designed to produce a policies and procedures manual in PDF format**. ■ Includes **content and variables** that you can re-use. ■ Includes **auto-generation of a TOC and index**.
Product Foldout	■ Contains two topics and two page layouts **designed to create a four-pane PDF product foldout**. ■ Ideal for **brief product instructions**.
User Guide	■ Contains starter topics and other files **designed to produce a user guide in PDF format**. ■ Includes **auto-generation of a TOC, glossary, and index**.

Tutorial Templates

Template	Characteristics
Austin	■ Designed to be used alongside various feature tutorials. Tutorials are accessible in the Flare Desktop Help system. ■ Tutorials help you in the **creation of Flare Desktop features**, such as micro content, context-sensitive Help, snippet conditions, and more.
San Diego	■ Designed to be used alongside self-paced **Getting Started tutorial**. Tutorials are accessible in the Flare Desktop Help system. ■ This tutorial gives you **hands-on experience in Flare Desktop**, guiding you in the basic steps for creating, developing, and building output. ■ End result is a PDF guide and online HTML5 output with **top navigation like a modern website**, instead of the more traditional tripane format.

Is It a Flare Online Project or a Flare Desktop Project?

Projects are the same in Flare Online and Flare Desktop. It does not matter if you create a project in Flare Online or if you upload one to your Flare Online license from Flare Desktop; they both have FLPRJ file extensions, and the files are compiled in the same way. Any content authored is a combination of Hypertext Markup Language (HTML) and MadCap Software markup. The markup allows you to use unique software features from MadCap.

What you can *do* with project files is the differentiating factor. For example, Flare Desktop has countless authoring options and features available, some that are quite advanced and often important only for specific, unique circumstances. On the other hand, Flare Online lets you perform the most essential authoring functions, but you can also accomplish other important cloud-based tasks, such as planning, tracking, and managing processes, hosting output, and working with teams.

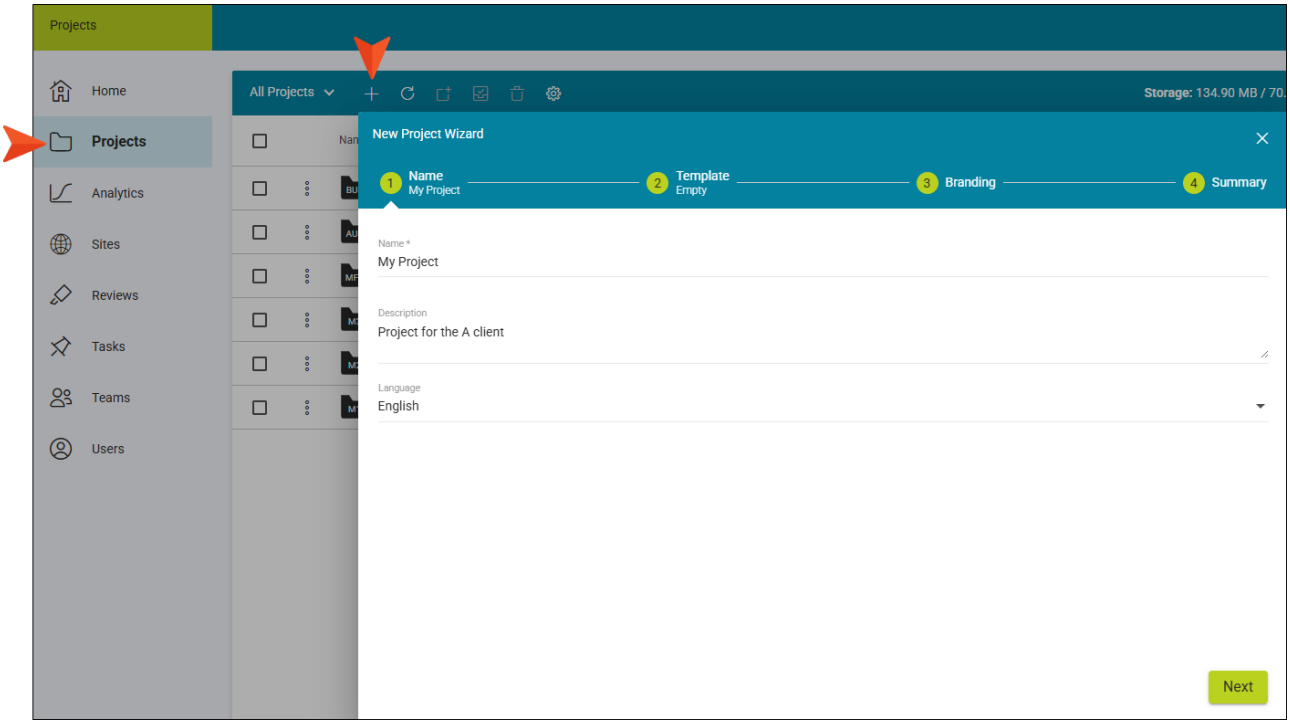
Opting to use Flare Online, lets you conveniently make basic projects in the cloud. If an author needs to work with the project in Flare Desktop after it is created in Flare Online—because advanced features are needed for the project—the user needs to (1) have access to the project, and (2) open Flare Desktop and import the project from Flare Online. If additional changes are made in Flare Desktop or Flare Online, the work would need to be synchronized between the local and remote repositories.

Main Activities for Starting Projects

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

Creating Projects

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



How to Create a Project

1. On the left side of the Flare Online interface, click **Projects**.
2. From the toolbar in the grid, click . The New Project Wizard opens.
3. In the Name screen, enter the following:
    a. Enter a **Name** for the new project.
    b. (Optional) Add a **Description** to help you identify the project.
    c. From the **Language** drop-down select the primary language for the project.
4. Click **Next**.
5. In the Template screen, choose a source template file. When you select a template from the left, it displays with a description and preview to the right.
    - **Online** These templates are designed for online output only (although you can add print-based outputs later).
    - **Online & Print** These templates are designed to generate both online and print-based outputs from the same content.
    - **Print** These templates are designed for print-based output only (although you can add online outputs later).
    - **Tutorials** This folder contains templates intended to be used with various tutorials.
    - **Empty** This is a basic default template with minimal files and branding.
6. Click **Next**.
7. (Optional) In the Branding screen, choose branding colors, a font family, logo, and hero image to apply to your project. This will give your project a custom look and feel from the start. Branding in the wizard is essentially the same thing as the Branding Stylesheet Editor that you can open (and edit options) anytime as a standalone editor after a project is created.

> NOTE The field selections for branding might change slightly depending on the factory source template chosen.

> NOTE When a project is created a new branding file is automatically added that specifically identifies values for the branding elements. This file is a cascading stylesheet. Its default location is Content > Resources > Branding (Branding.css), but you can store the stylesheet anywhere. If a custom branding scheme is not defined, the stylesheet is still generated but with default branding values.

8. Click **Next**.
9. In the Summary screen, review your selections for the new project. Click **Create Project**. If you need to adjust the options, select **Back**.

   When done it opens the Projects page with a blank dashboard.

> TIP Add the Project Properties widget to the dashboard to see a summary of the project.

Uploading (Binding) Projects

You can upload a project to Flare Online from Flare Desktop. A copy of the project files will therefore reside in the cloud via Flare Online, and you will be able to keep the local and cloud versions of the project synchronized using integrated source control. You will also be able to generate and publish Flare targets using Flare Online.

Permission Required?

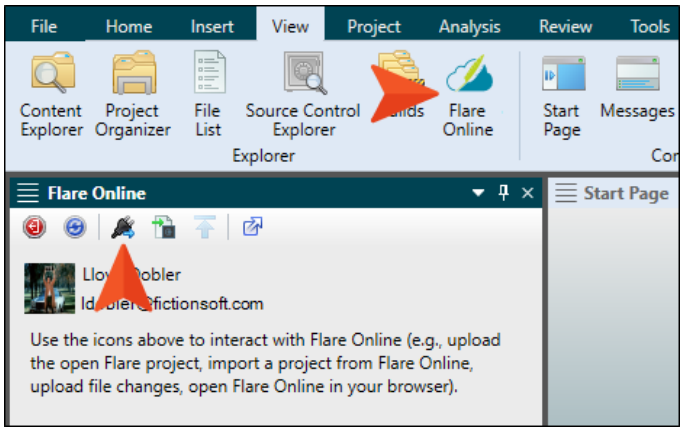
For this activity, you must have the following permission setting:



For more information about permissions, see the Help system.

How to Upload (Bind) a Project to Flare Online

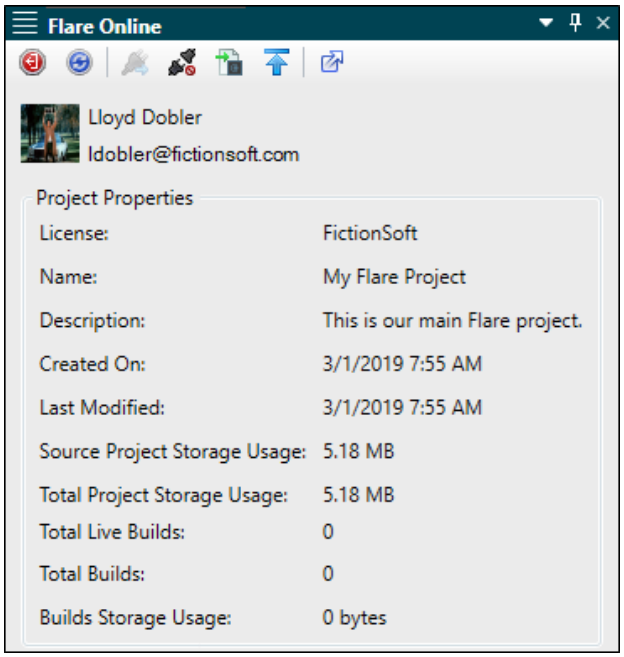
1. Open the project in MadCap Flare Desktop.
2. Select **View > Flare Online**. The Flare Online window pane opens.
3. Be sure to log in if you aren't already.
4. Click .



> **TIP** If this button is disabled, try clicking in the window pane first.

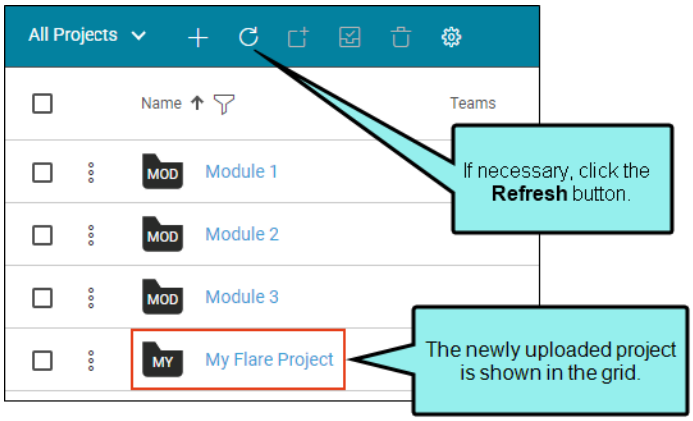
5. In the Bind Project dialog, you can complete these fields, then click **OK**.
   - **Enter project name** This shows the name of the project. You can change the name if you want, but in most cases you will probably want to keep the same name.
   - **Enter project description** You can enter a short description, which can then be seen when anyone views the project profile in Flare Online.

6. In the success message, click **OK**. The MadCap Flare Online window pane adjusts, showing properties for the current project.



7. (Optional) In the local toolbar, click  to open Flare Online.

8. (Optional) In Flare Online, you can click **Projects** on the left side to open the Projects page. The uploaded project should be shown in the grid. If it isn't, click  to refresh the page.



NOTE If your project is dual-bound, be sure you check in or push the project files to your third-party source control provider after you bind to Flare Online. This will ensure that other users who import the project from source control have the most recent version of the project.

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.

NOTE Due to security issues, MadCap Software does not support the use of the Secure Shell (SSH) protocol in MadCap Flare Desktop when connecting to MadCap Flare Online. The Hypertext Transfer Protocol Secure (HTTPS) protocol is supported.

Importing Projects

If another user uploads a project locally from Flare Desktop to your MadCap Flare Online license and you do not yet have that project on your computer, you can import it. You can do this from the Flare Online window pane in Flare Desktop.

In order to import a project, you must be associated with that project in Flare Online.

NOTE If your project is already bound to a third-party source control provider other than Git—i.e., you are working in a dual-bound model as opposed to a single-bound model—the Import option in the Flare Online window pane will be disabled. You will have to import your project directly from source control using your non-Flare Online binding.

If you already have the project on your machine, you do not need to reimport the project from source control. Instead, you can get the latest version from source control by using the Flare Online Source Control ribbon.

Be sure that you have the latest version of the project.

IMPORTANT If you are using a Git-Flare Online dual-binding, you can import projects from Git (using the Import Project From Source Control Wizard) or from Flare Online. The project will be the same. However, if you import from Flare Online, you will only be able to push changes to and pull changes from Flare Online. If you import from Git (see the Flare Desktop Help system), you will be able to push changes to and pull changes from Flare Online *as well as* your main Git repository. This is because the project in Flare Online has no connection to the original Git repository, and if you import from Flare Online you will not have those source control bindings.

Permission Required?

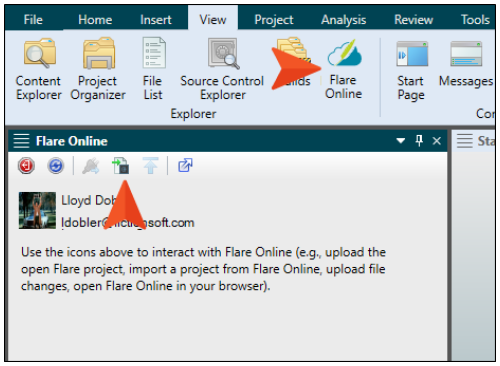
For this activity, you must have the following permission setting:



For more information about permissions, see the Help system.

How to Import a Project From Flare Online

1. Select **View > Flare Online**. The Flare Online window pane opens.
2. Be sure to log in if you aren't already.
3. Click .



> **TIP** If this button is disabled, try clicking in the window pane first.

The Import Project dialog opens.

4. From the **My Projects** field, select the project you want to import.
5. Next to the **Destination folder** field, click  and choose the folder where you want the imported project to be stored on your computer.
6. Click **OK**.
7. When the import is finished, you can click **Open** to launch the project in Flare Desktop. Otherwise, you can click **Cancel**.

> **NOTE** Due to security issues, MadCap Software does not support the use of the Secure Shell (SSH) protocol in MadCap Flare Desktop when connecting to MadCap Flare Online. The Hypertext Transfer Protocol Secure (HTTPS) protocol is supported.

What’s Next?

As you make changes to the local project in Flare Desktop, you will need to synchronize those changes with Flare Online periodically to make sure the local and cloud files are in sync. See the Help system or the *Source Control Guide*.

Opening a Project

If you are associated with a project, you can open it to see its dashboard and navigate to other views.

How to Open a Project

1. On the left side of the Flare Online interface, click **Projects**.
2. In the grid, click the name of the project. The project opens in the Dashboard view.
3. By clicking the tabs at the top of the screen, you can move between the other project views—Workspace, Repository, Output, Checklists, Reports, and Translation.

> NOTE A user needs to be associated with a project in order to open it. See the Help system.

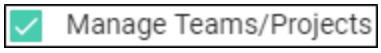
Associating Projects With Users and Teams

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

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

Permission Required?

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



For more information about permissions, see the Help system.

How to Associate Projects With Users and Teams

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

1. Make sure you have already created the team(s) and invited the user(s).
2. On the left side of the interface, click **Projects**.
3. Click the project's avatar.
4. On the left, click **Access**.

   Use the tabs at the top of the dialog to view and modify teams and users associated with a project. The profile has efficient loading performance and easy editing, especially when there is a large set of data (e.g., 100 items of more). The dialog includes infinite scrolling, search, multi-select, etc.
5. From the **Teams** tab at the top, you can add teams and associate them with a project.
6. From the **Users** tab at the top, you can add authors to a project.
7. Close the dialog. (The workspace updates.)

> NOTE Associations between users, projects, and teams are treated separately. Therefore, if one connection is severed, another one remains.
>
> For example, let's say you open a team and associate it with a user and a project. This means that both the user and project are associated with that team, but the user is not automatically associated with the project. You need to manually associate the user with the project. This is an extra step, but if you then remove the user from the team, that person is still connected with the project.

Steps 2-5 for Projects

After you start a project, you can move through the rest of the steps:

- Step 2: Authoring
- Step 3: Designing
- Step 4: Developing Targets
- Step 5: Building and Publishing Output

For more details on these steps, see the Help system or other PDFs, which are listed at the end of this guide.

CHAPTER 3

Page Views for Projects

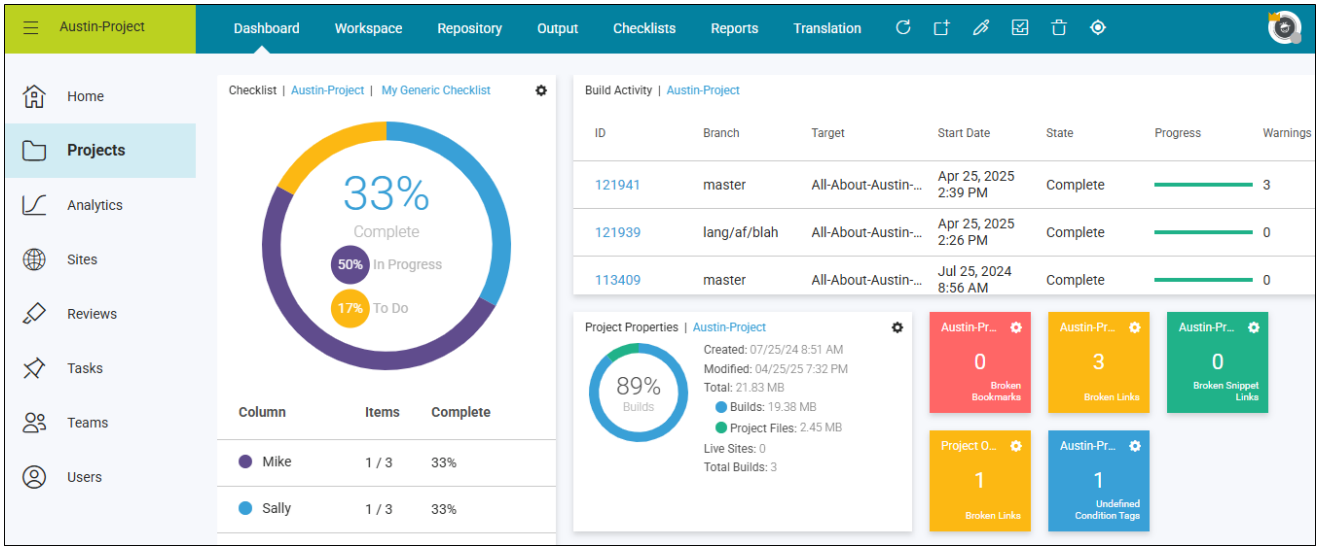
When you open a project, you can work in various page views.

This chapter discusses the following:

Dashboard 30
Workspace 31
Repository 51
Output 58
Checklists 59
Reports 60
Translation 61

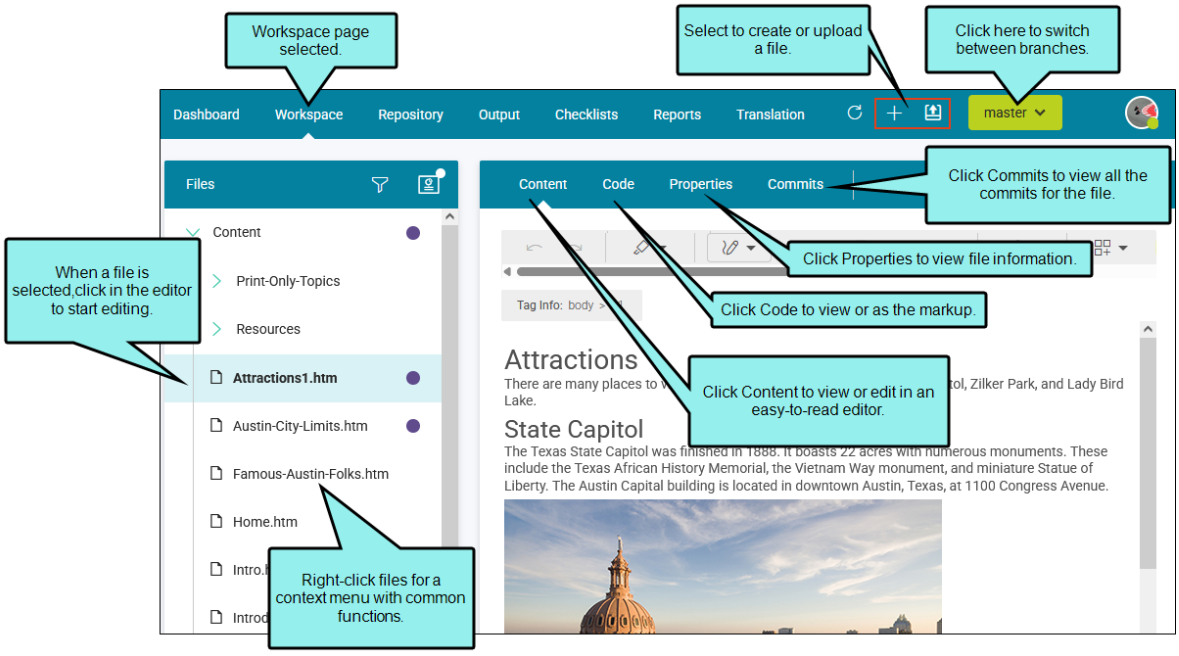
Dashboard

You can add widgets to the Home and Project dashboards. They are clickable so you can access information directly from a widget. Additionally, widgets can be moved and resized.



Workspace

Using the Workspace page you can view, edit, and author files for any project that is uploaded to Flare Online. In addition, multiple authors work collaboratively in files, with full transparency of edits from everyone in that project.



Authoring

MadCap Flare Online's cloud environment empowers you to author project files directly without having to use Flare Desktop. You can add new files, edit existing content, upload files, and even use integrated ChatGPT). The Flare Online interface includes an easy-to-use editor for content viewing and editing, and if permission is granted, you can also edit in a code editor.

For more information and details, see the Help system or the *Authoring Guide*.

> ☆ EXAMPLE Your documentation team has created a Help system using MadCap Flare Desktop. Your larger organization uses MadCap Flare Online as its platform to manage the content. A director, who is not trained in using Flare Desktop, views some content from the project in Flare Online and sees an ideal place to insert a relevant new topic. Without having to go through a review process or track down a writer to do the work, the director uses Flare Online to quickly create and add a topic to the project. The change is committed to the project. Anyone who works in the project in Flare Online will see the change, and Flare Desktop users will see updates once the remote and local repositories are synchronized.

Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- 

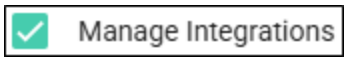
  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

- 

  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

In addition, AI Assist involves the following permissions:

- 

  This is required to integrate a ChatGPT account with a Flare Online license in the license settings.

- 

  This is required to use AI Assist (and therefore ChatGPT) when modifying topics and snippets.

  > NOTE Even if this permission is enabled, ChatGPT does not scan anything on your computer. The only information ChatGPT can acquire from you is what you enter manually into the prompt when using AI Assist. If your company has strict policies against AI or ChatGPT, simply do not use it.

For more information about permissions, see the Help system.

NOTE For the authoring feature to work properly, your project must be single-bound to Flare Online as the primary source control provider. The authoring feature does not support dual-bound projects.

NOTE If an author needs to work with the project in Flare Desktop after it is created in Flare Online—because advanced features are needed for the project—the user needs to (1) have access to the project, and (2) open Flare Desktop and import the project from Flare Online. If additional changes are made in Flare Desktop or Flare Online, the work would need to be synchronized between the local and remote repositories.

NOTE Since Flare Online is a remote repository, those who use Flare Desktop after changes are made in Flare Online, need to synchronize their remote and local repositories.

- Flare Online side Content is authored and committed to the project in Flare Online.
- Flare Desktop side To interact with updated content in Flare Desktop, use source control to pull changes from the remote repository and sync it to the local repository.

If two authors are editing the same file, at the same time, but one is working in Flare Desktop and the other is working in Flare Online, there is an auto-merge feature that detects external commits.

Deleting Project Folders and Files

You can delete folders or files directly in Flare Online, within the Content Editor's Workspace.

Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- 

  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

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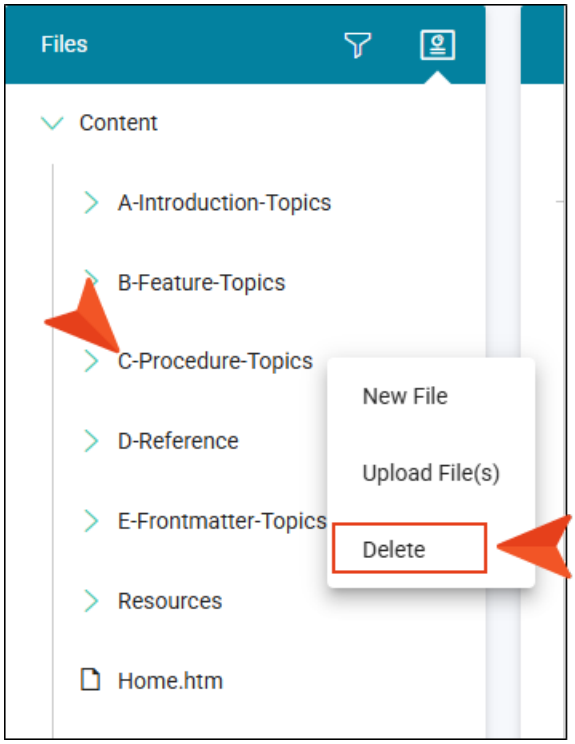
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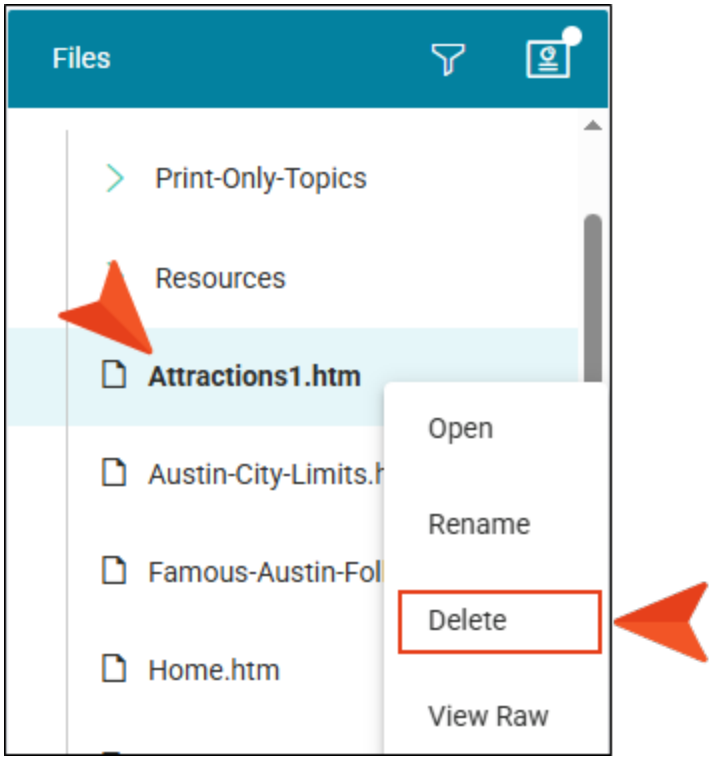
  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

For more information about permissions, see the Help system.

How to Delete a Folder or File in Flare Online

1. On the left side of the Flare Online interface, click **Projects**.
2. Select a project to open it.
3. Click the **Workspace** tab at the top of the screen.
4. From the Workspace view on the left side, navigate to the folder or file. You can also click  to search for a specific file.
5. Right-click a folder or file, and select **Delete**. If you are deleting a folder, all the subfolders and files under it will also be deleted.





6. In the dialog, click **Delete**.

> NOTE Make sure you pay attention to any warnings in the dialog before deleting.

7. To commit, the deletion(s), click  at the top of the file structure to open the Workspace Overview.
8. Select the checkbox(es) next to the items you want to delete, and in the upper-right, click **Commit**.
9. Enter a **Commit Message**, and click **Commit**.

Deleting Top-Level Folders or Files

It is possible to delete folders and files at all levels, even the top level. For example, every project has a root Content folder and Project folder, as well as a .gitignore and .flprj file. Except in rare situations, you probably do not want to delete any of these folders or files because doing so will adversely affect your project. Warnings are evident in the dialog that opens when you attempt to delete any of these.

Restoring Deletions Before Committing

Since deleted files are not immediately deleted, but rather added to the Workspace Overview pending a commit, you can restore those files if you change your mind. To do this, click  at the top of the file structure to open the Workspace Overview. Click the three-dot menu to the left of the file and select **Restore**. If that file was included in a folder that has also been deleted, restoring the file will also restore the folder

What's Noteworthy?

WARNING Use caution when deleting a file. If it has been previously linked to other files, deleting it can result in broken links. You would need to locate those broken links in Flare Desktop to fix them.

NOTE When you delete the final file within a folder, the folder is also automatically deleted.

NOTE If multiple authors are using the same file when you want to delete a file, consider the following:

- The dialog displays a warning, letting you know that other users are editing the file and that deleting will lose their changes. You might want to discuss deleting the file with your co-workers first.
- If you proceed to delete a file, a warning displays in the workspace for other authors indicating that the file has been deleted.
- Once deleted and committed, the file is removed from the Workspace view and the Workspace Overview.
- The Repository page, Commits area is updated with the change.

Renaming Project Files

Instead of opening a project in Flare Desktop to rename files, you can do that directly in Flare Online. You can rename any of the topics in the Content Editor's workspace.

Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- 

  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

- 

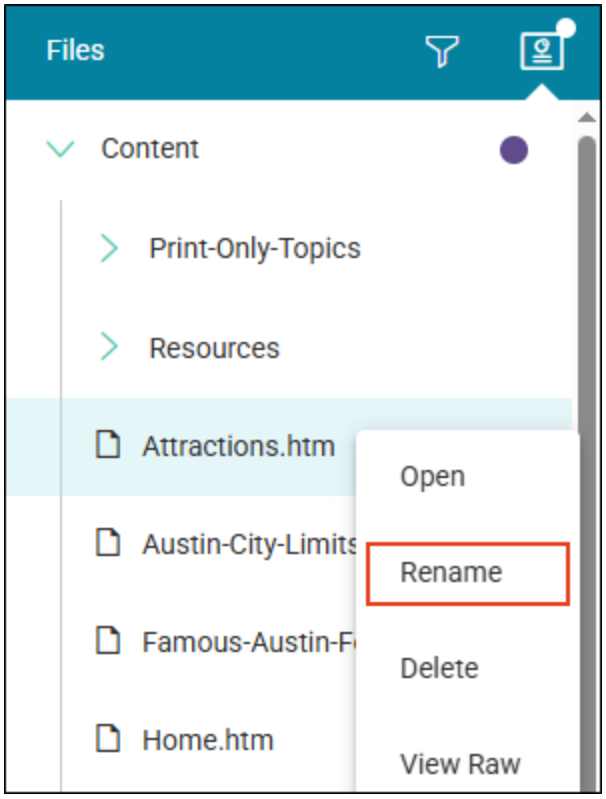
  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

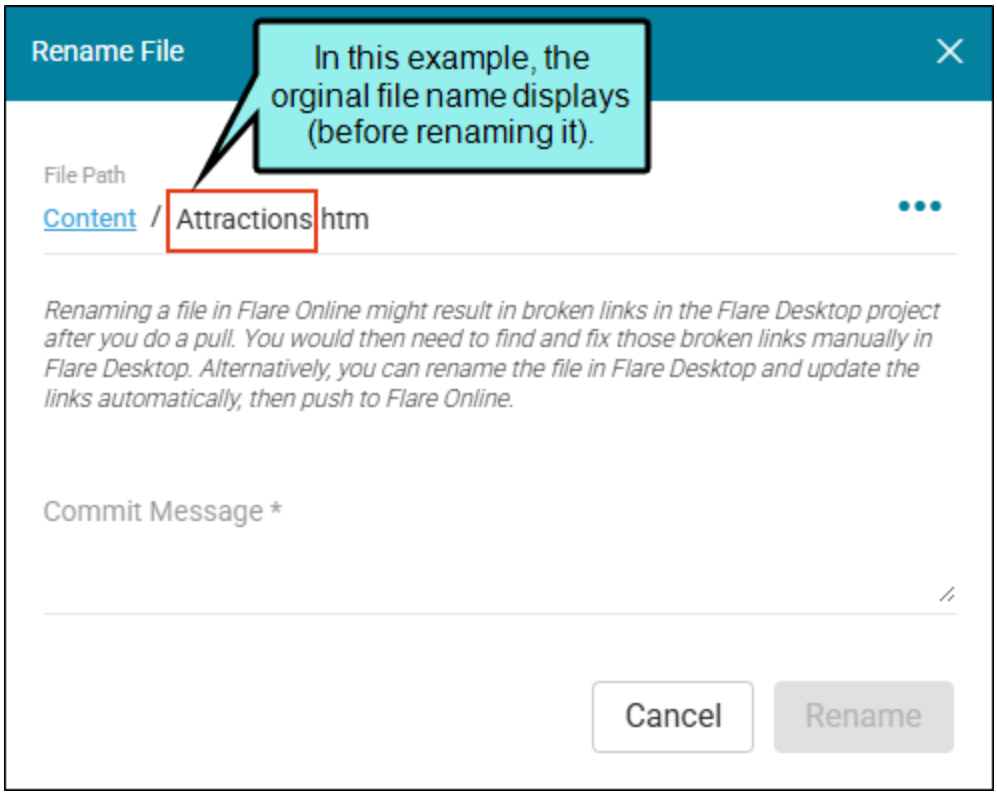
For more information about permissions, see the Help system.

How to Rename Files in Flare Online

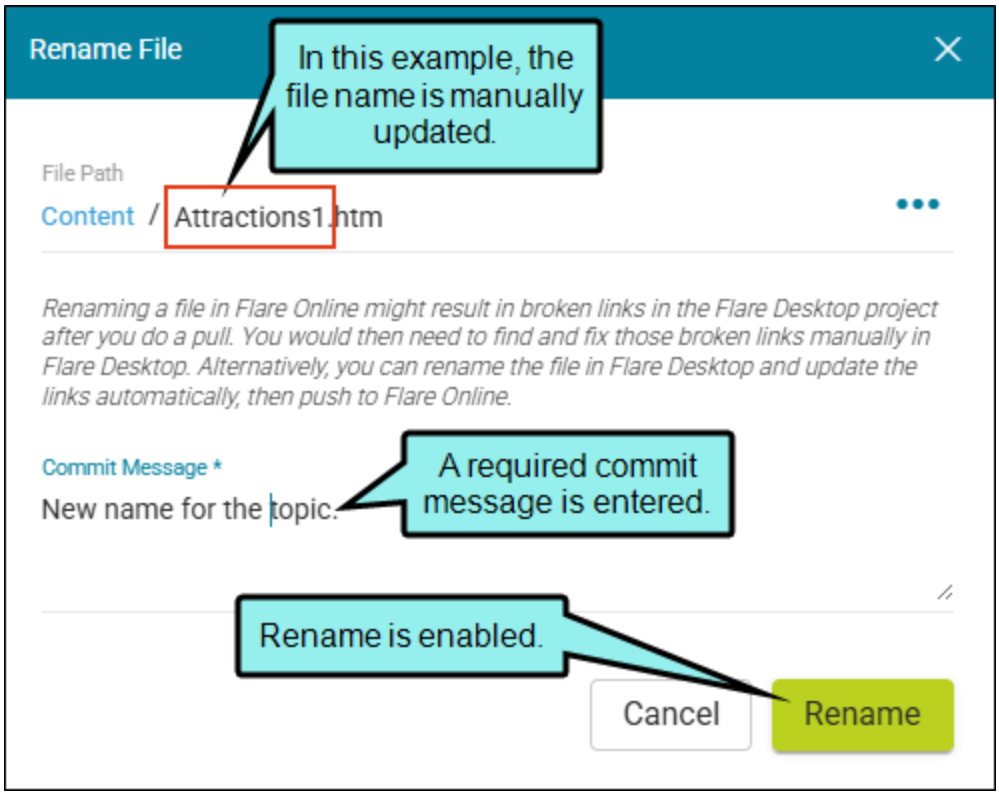
1. On the left side of the Flare Online interface, click **Projects**.
2. Select a project to open it.
3. Click the **Workspace** tab at the top of the screen.
4. From the Workspace view on the left side, expand the existing folders to navigate to a file. You can also click  to search for a specific file.
5. Right-click a file, and select **Rename**.



6. In the Rename File dialog, at the end of the **File Path** field, enter a new name for the file. You can optionally click ••• to select a location for the file in the project.



7. In the **Commit Message** field, enter a (required) comment for the commit.



8. Select **Rename**.

> **WARNING** Renaming a file in Flare Online might result in broken links in the local project in Flare Desktop after you do a pull. You would then need to find and fix those broken links manually in Flare Desktop. Alternatively, you can rename the file in Flare Desktop and update the links automatically, then push to Flare Online.

NOTE If multiple authors are using the same file when you want to rename a file, consider the following:

- The Rename File dialog displays a warning, letting you know that other users are editing the file and that renaming will commit their changes. You might want to discuss renaming the file with your co-workers first.
- If you proceed to rename a file, a warning displays in the workspace for other authors indicating that the file has been renamed.
- The Repository page, Commits area is updated with the change.

Viewing Project Files

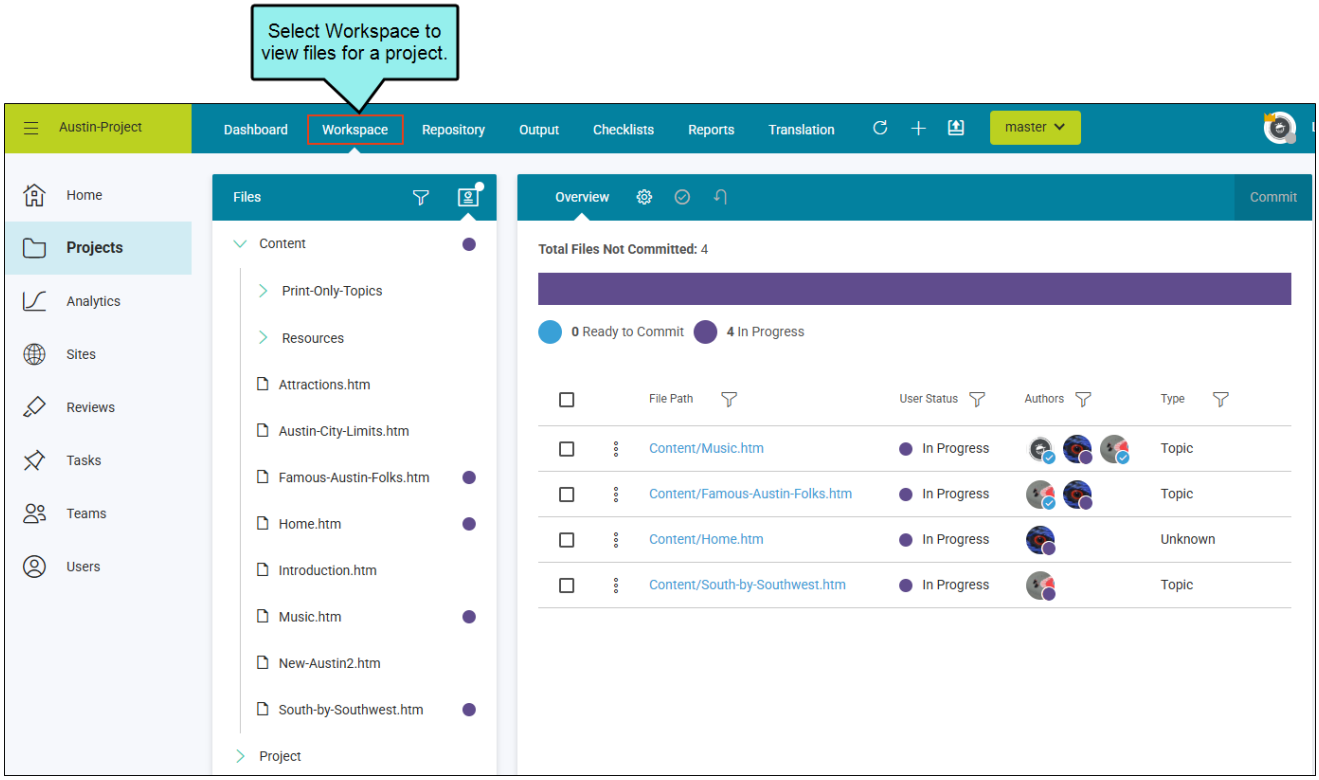
After opening a project in Flare Online, you can view files associated with a project.

Permission Required?

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

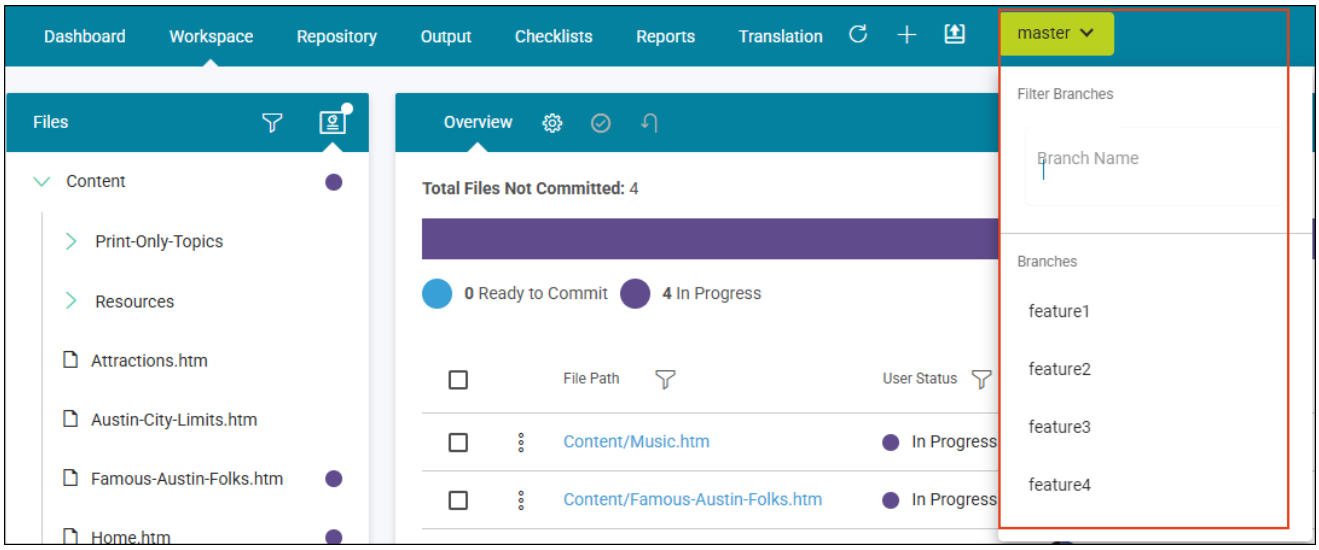
Viewing Workspace Page

After you open a project in Flare Online, you can click the **Workspace** option at the top. This lets you see all files in your project in a few different ways.



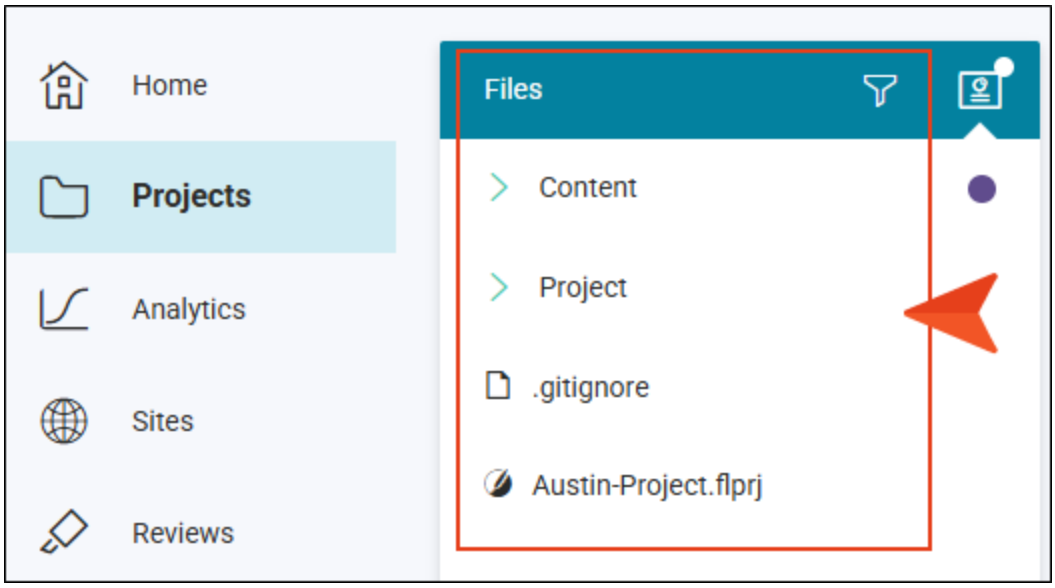
Switching Branches

If you are using branching, you can click the drop-down at the top of the page and switch from one branch to another. The files specific to that branch display accordingly on the page. A filter field at the top of the drop-down lets you limit the branches shown.

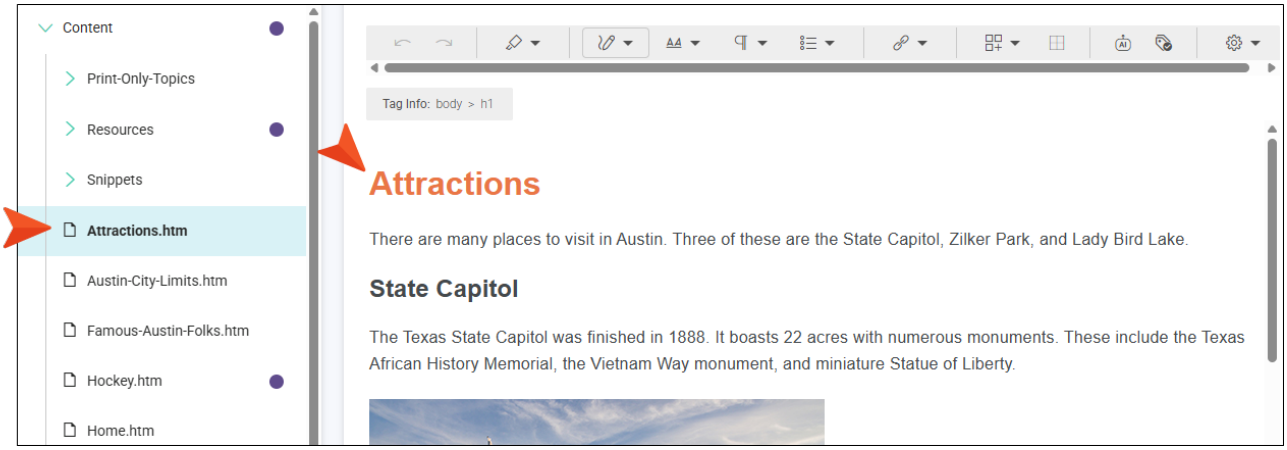


Viewing Individual Files

The project files are shown on the left side of the page. You can expand or collapse the folders to locate a specific file.

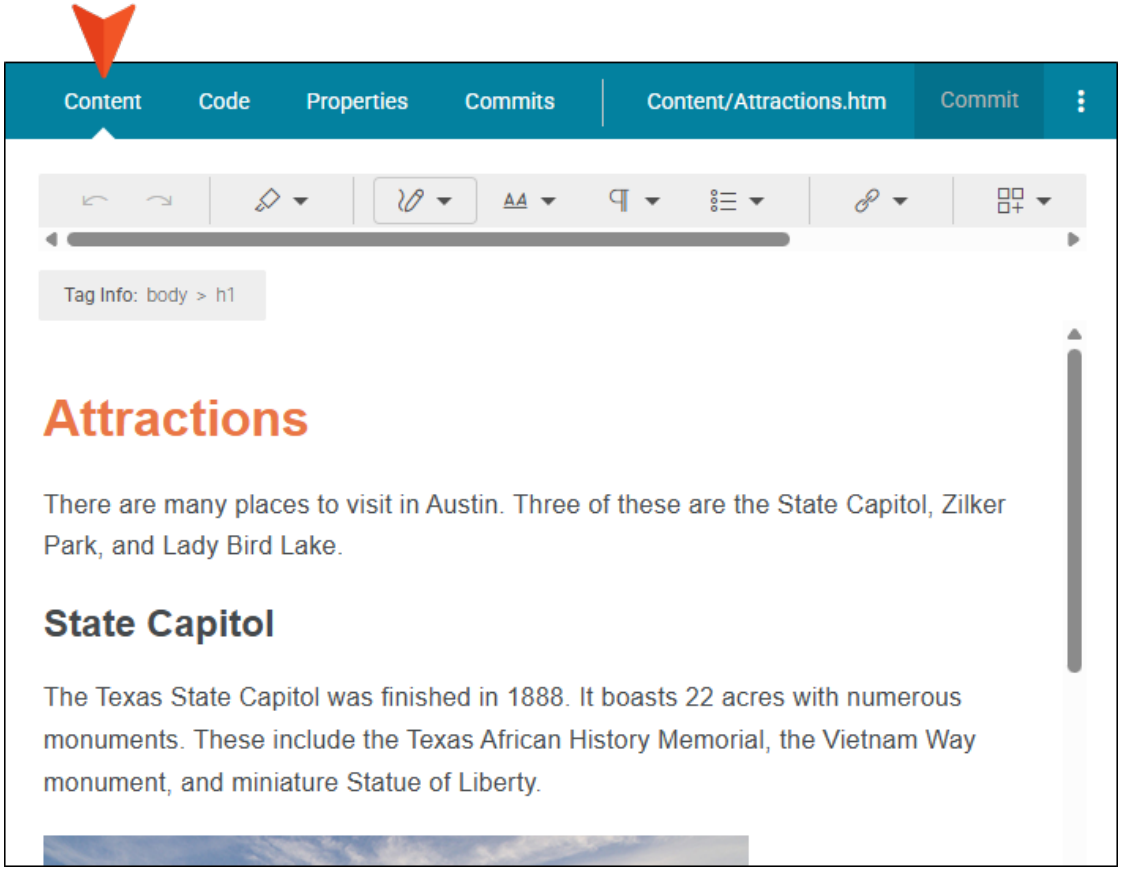


If you select a file, it opens as a preview in the editor to the right. Content files (e.g., topics and snippets) display the styles defined in your cascading stylesheet (CSS) while you work in the editor and in your output. Other files might only display the code.

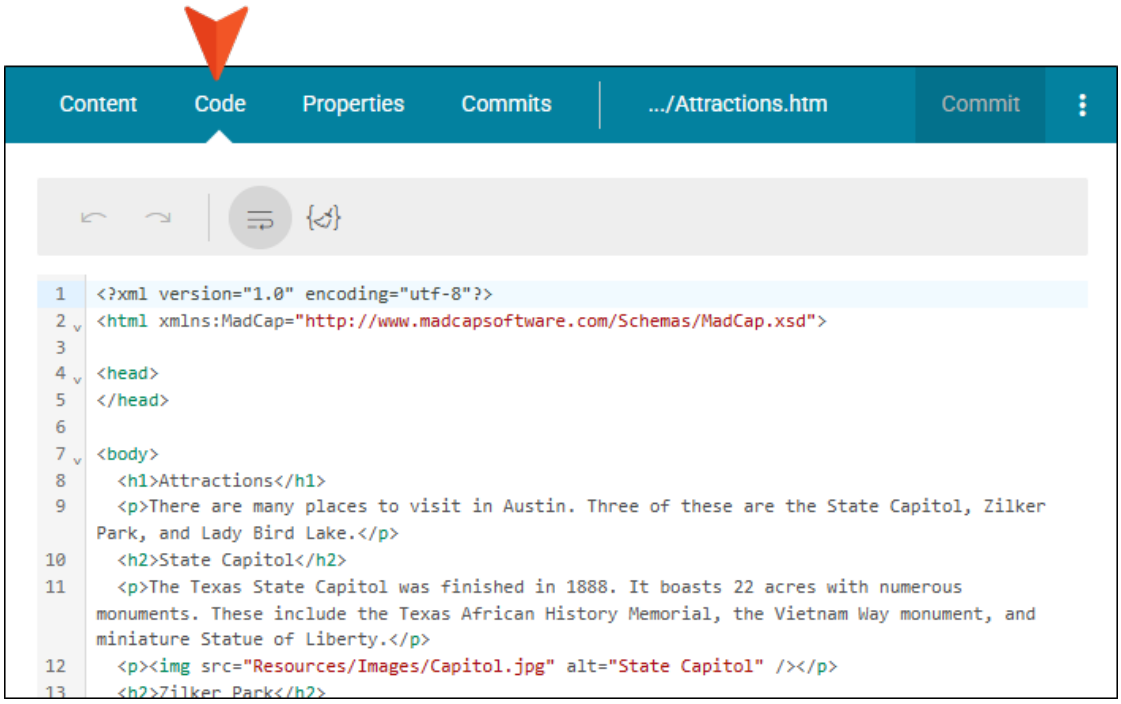


Depending on the type of file you open, you can switch between Content, Code, Properties, and Commits views.

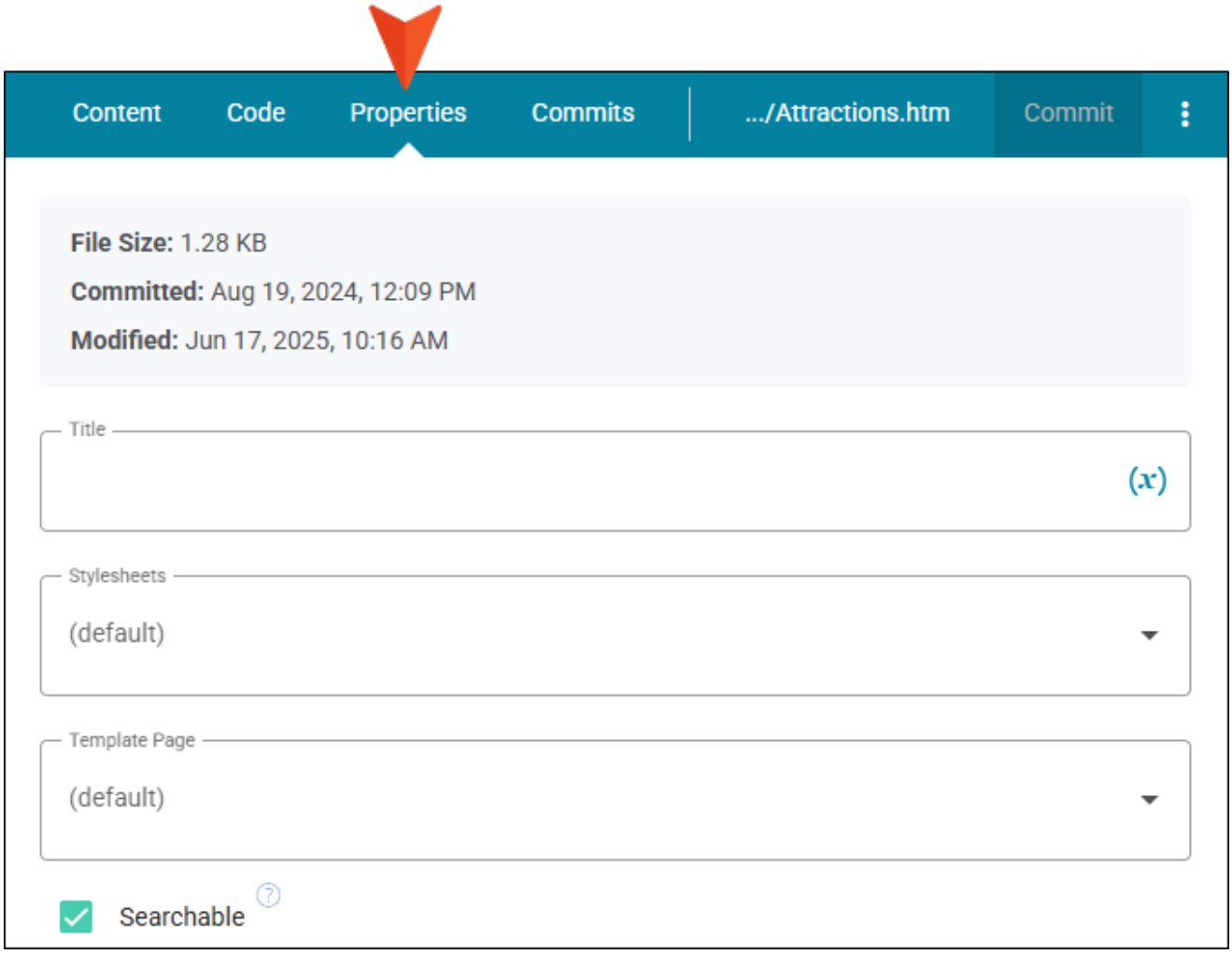
Here is the Content view:



Here is the Code view:

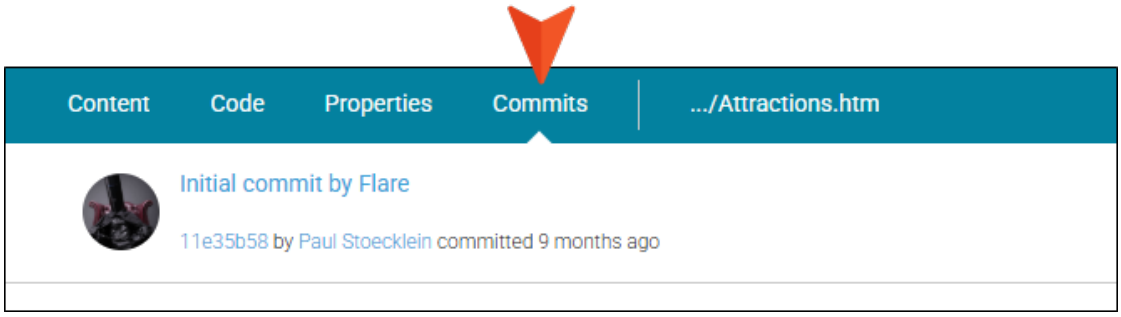


Here's the Properties view:



A Properties tab displays in the editor if applicable. This includes read-only information and various other options, depending on the file type.

Here is the Commits view:



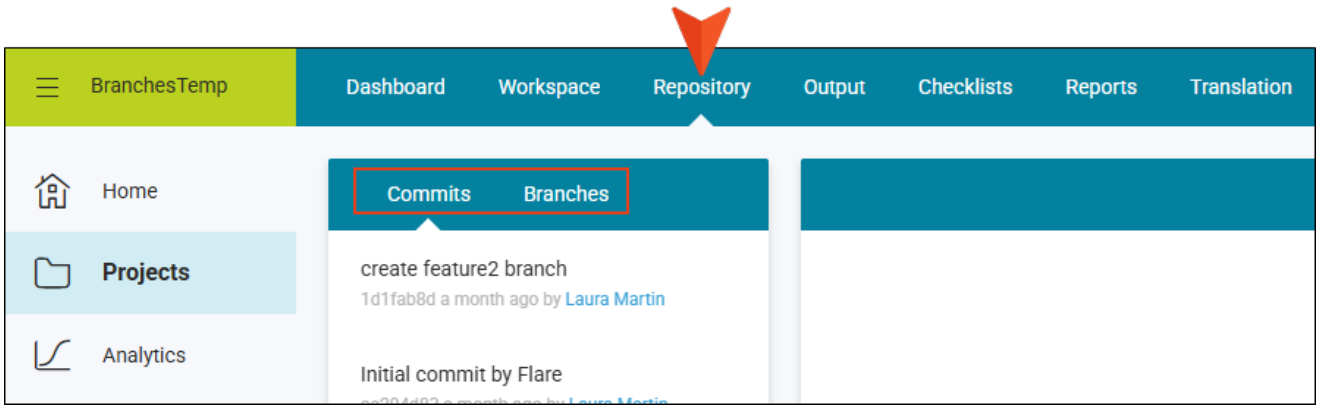
The Commits view lists all of the changes over time for the file, with the most recent commit at the top.

You can click a row to focus on the code for the file. Buttons let you see the old and new versions in a Unified view or Split view.



Repository

Flare Online is a remote repository running on a Git-based cloud platform. The Repository page includes 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 page provides details of all the source control changes that have taken place over time for the project.



Commits

After opening a project in Flare Online, you can see your commits associated with a project. You can also switch between branches (if you are using branching) to see the commits for each.

If permissions are set in Flare Online that allow for authoring project files (i.e., add, edit, upload files), you can update files directly in Flare Online. Changes that you want to keep need to be committed to the project. This is done through the Workspace page and Flare Online's editor.

Permission Required?

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

What are Commits?

A commit is a collection of changes that are pushed to a project's repository. You can commit files locally using Flare Desktop's application, or you can commit files working remotely through Flare Online's editor.

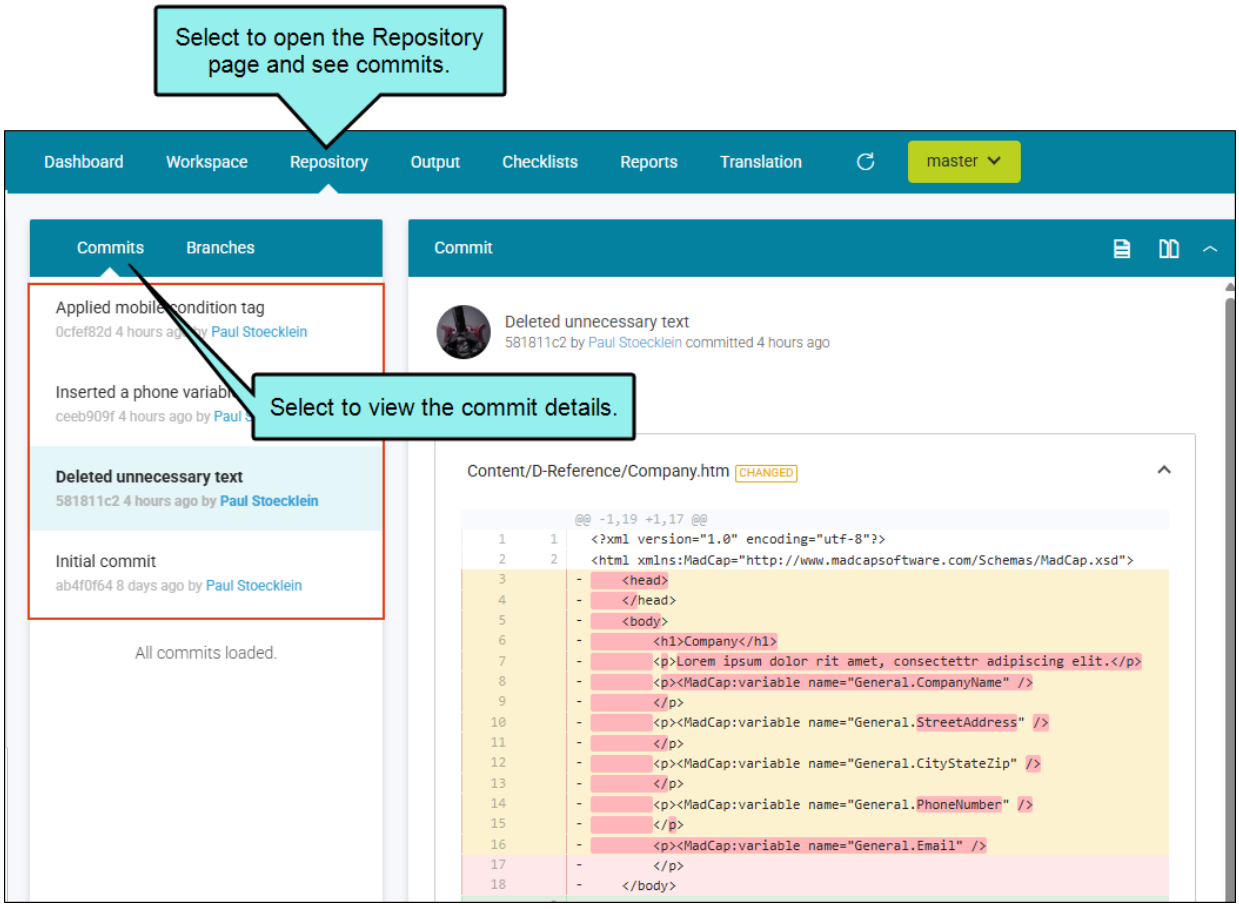
Whether you are working in Flare Online or Flare Desktop, adding comments to each commit is required. Comments are an easy way to see what types of changes are included in that commit. It is up to you to decide which changes are included in a commit before you continue making further changes that go into the next commit after that.

- Flare Online side A commit can be viewed in Projects using the Workspace or Commits page.
- Flare Desktop side Flare Desktop commits need to be pushed up to Flare Online to keep the files synchronized. Once the files are synchronized, you can view a commit in Flare Online.

Viewing Repository > Commits Page

If you want to view details about your commits in Flare Online, do one of the following from Projects.

- Click **Repository** at the top. Then make sure **Commits** is selected. The left side of the page lists the commits associated to all project files. If you click the row for the committed file, the Commit view opens to the right with changed items.

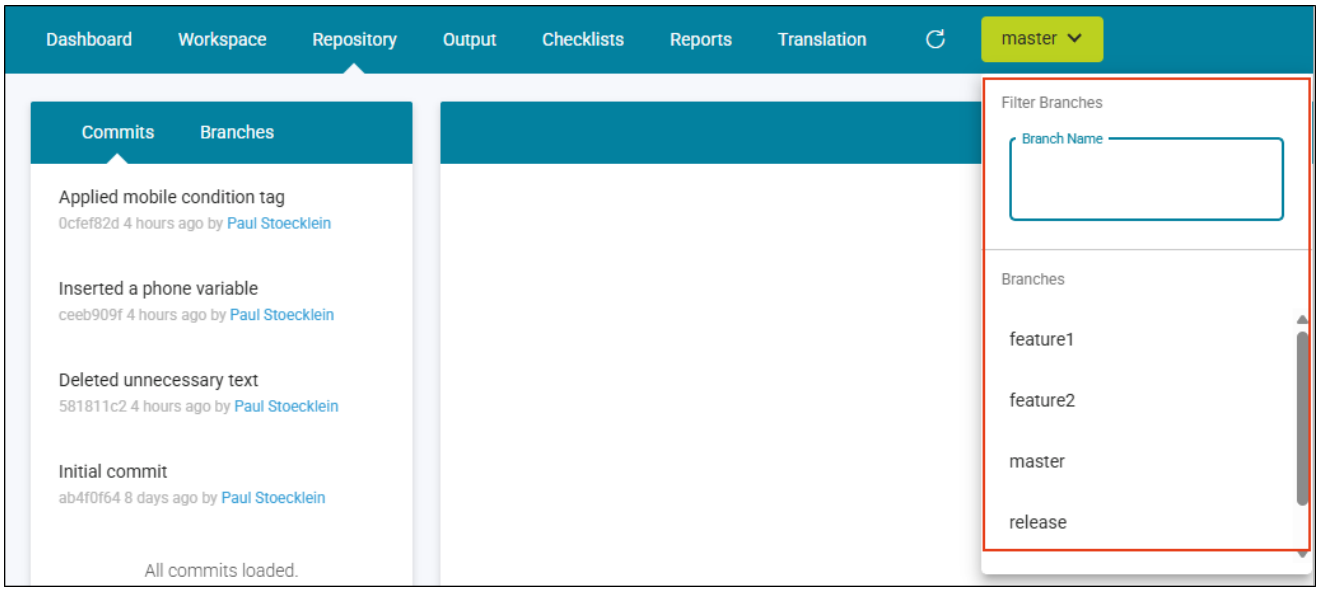


- Click **Workspace** at the top. When you select a file it displays in the editor to the right. Click the **Commits** tab in the editor. This lists all the commits pertaining to the selected file. If you click the commit item for a file, it displays the Commits page view and you can see what changed.

  All of the commits for the project are listed, with the most recent one at the top.

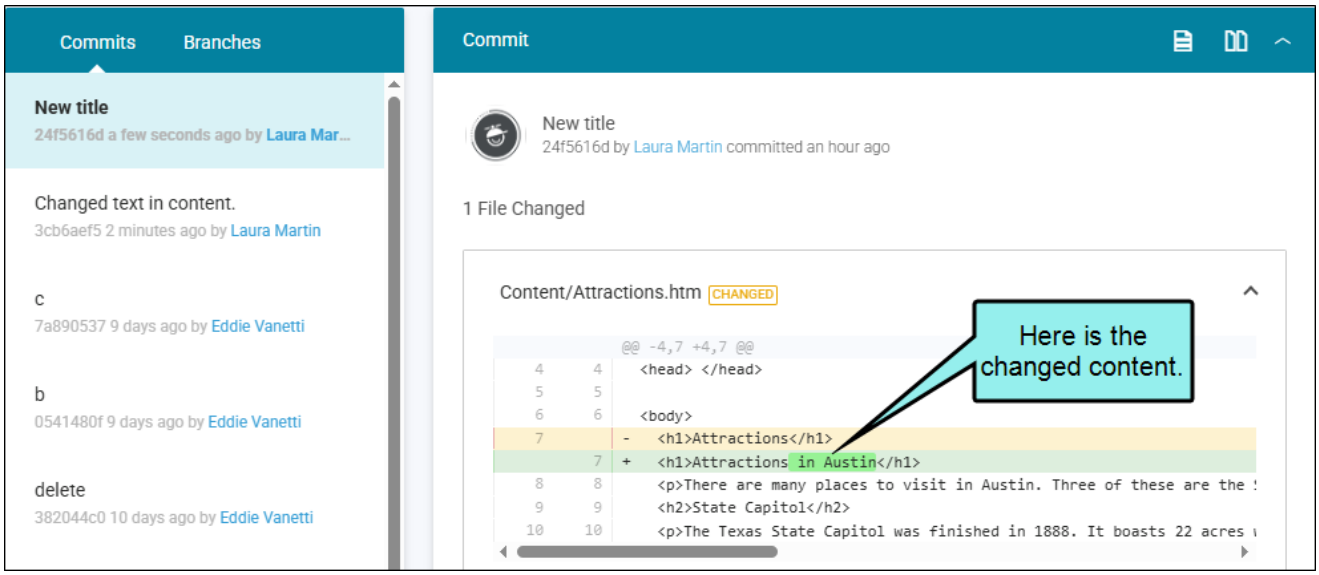
Switching Branches

If you are using branching, you can click the drop-down at the top of the page and switch from one branch to another. The commits specific to that branch will display accordingly on the page. A filter field at the top of the drop-down lets you limit the branches shown.



Viewing Individual Commits

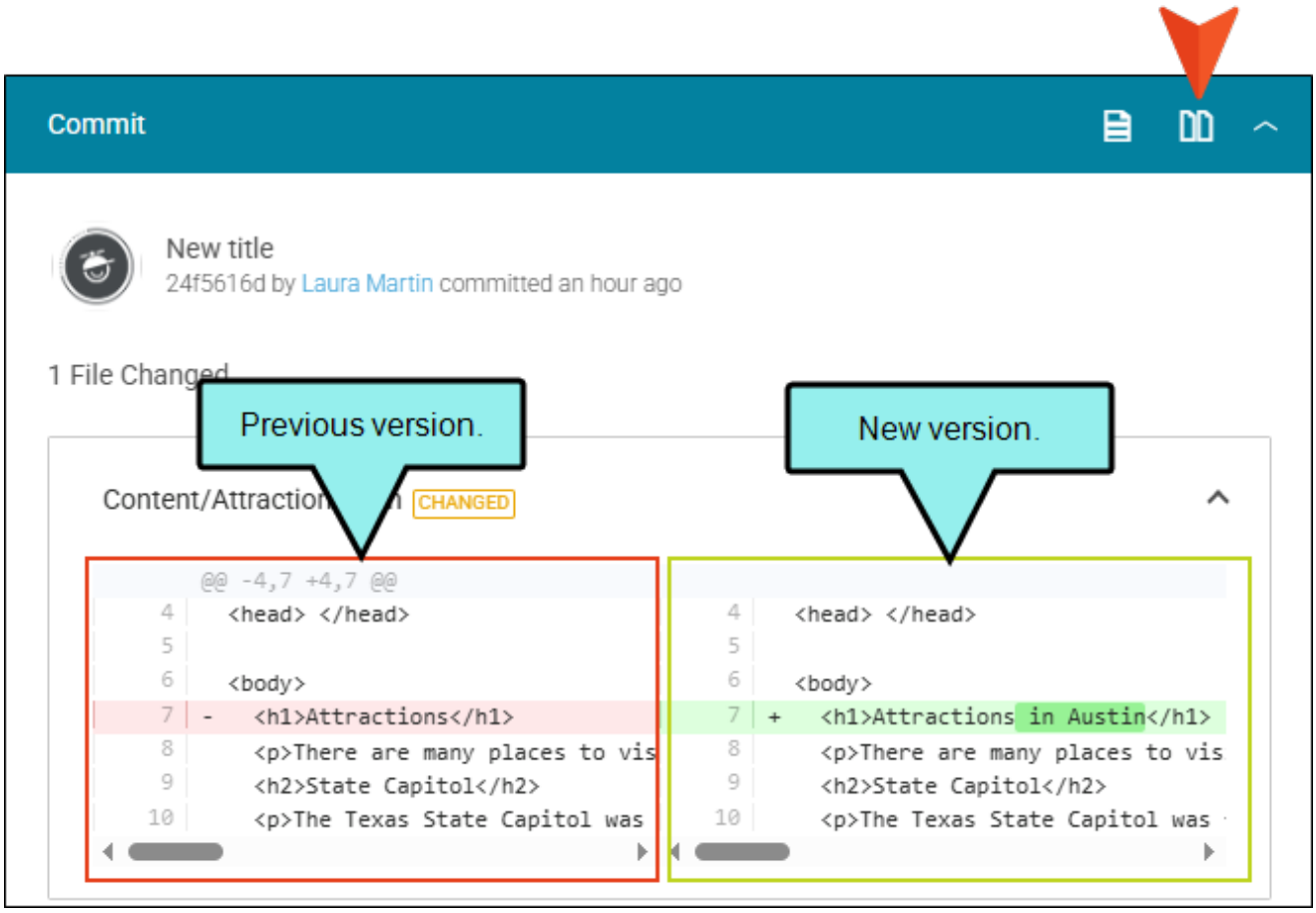
If you click any of the commit items, the Commits view opens allowing you to see what changed. You will often see two versions of the files involved in that commit. The background color shows changes. For example, more recent changes have a green background.



You can use the following buttons to switch between a Unified view and a Split view:



In a Split view, the differences look like this:

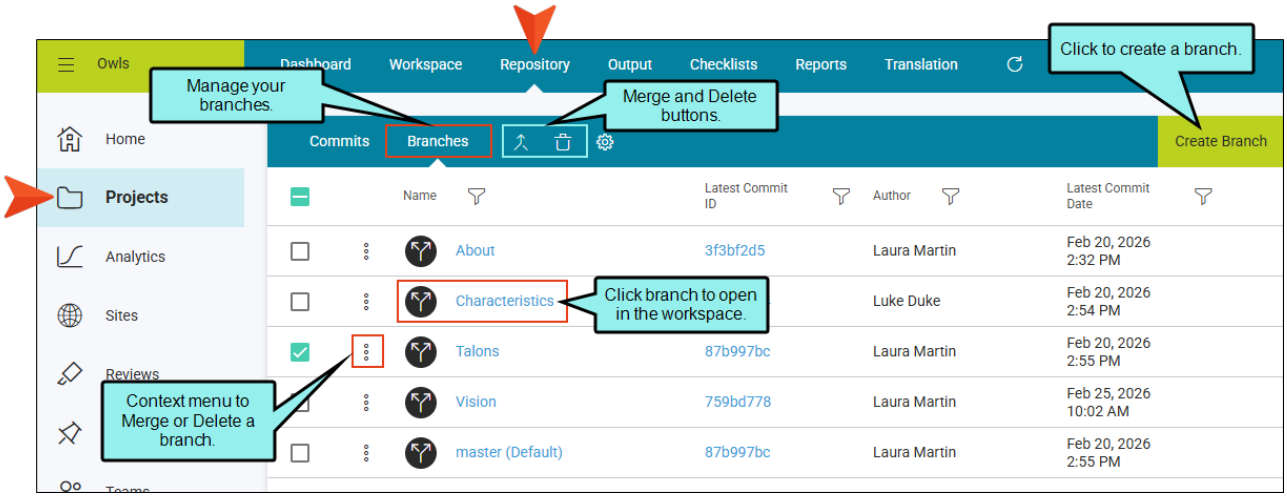


Sometimes a commit might show code on only one side of the page or the other. This usually happens when you have added or deleted a file in the project.

Branches

Flare Online supports branching, which allows for parallel content development. Because of this, you can make use of existing branches in your project. For example, you can select a specific branch for editing files, creating checklists, and building output.

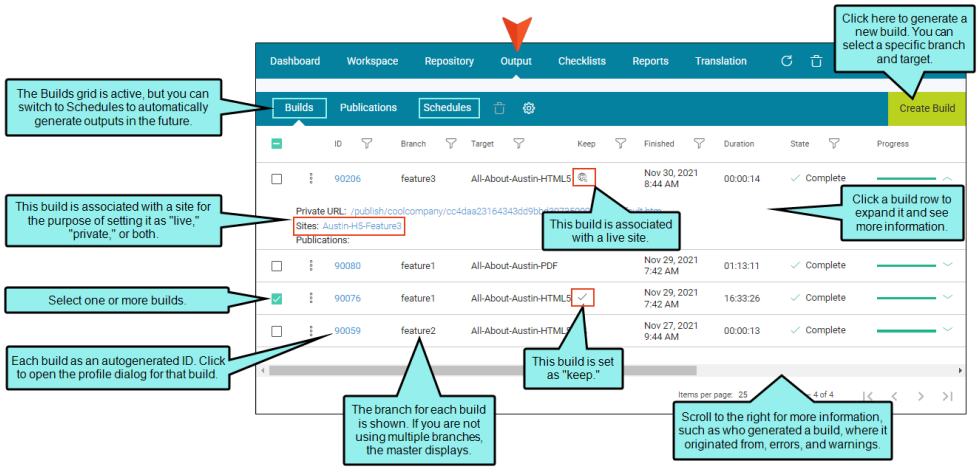
Flare Online provides a way for you to manage your project branches (without needing to use Flare Desktop). This means that with the proper permissions, you can create new branches, delete old or unwanted branches, and perform simple merge operations—all using Flare Online.



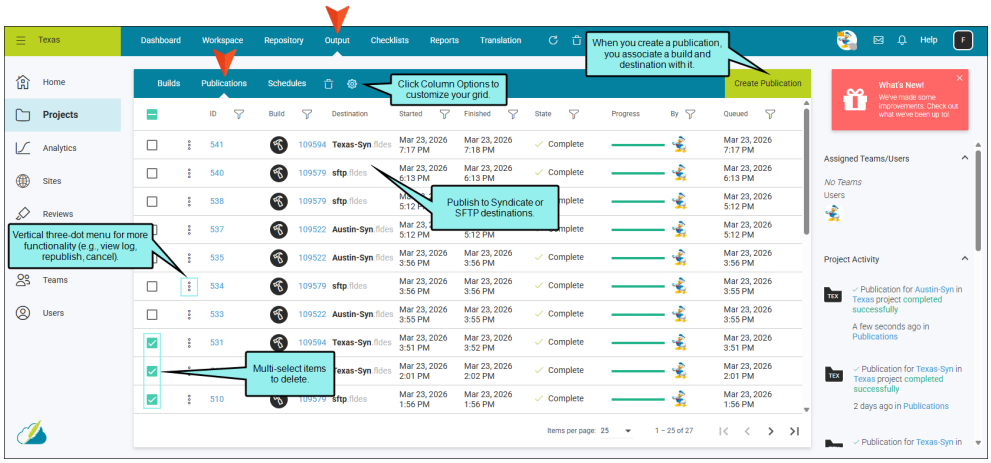
Output

Using the Output page you can generate builds, publish to locations outside of Flare Online, and manage various aspects of the project's output.

- **Builds** You can view, generate, and manage both builds and scheduled builds for Flare Online projects. Use the Builds tab to manually build targets, and use the Schedules tab to schedule a target to be generated.



- **Publications** You can view and create publications for your project. Use the Publications tab to manage output that goes to destinations outside of Flare Online.



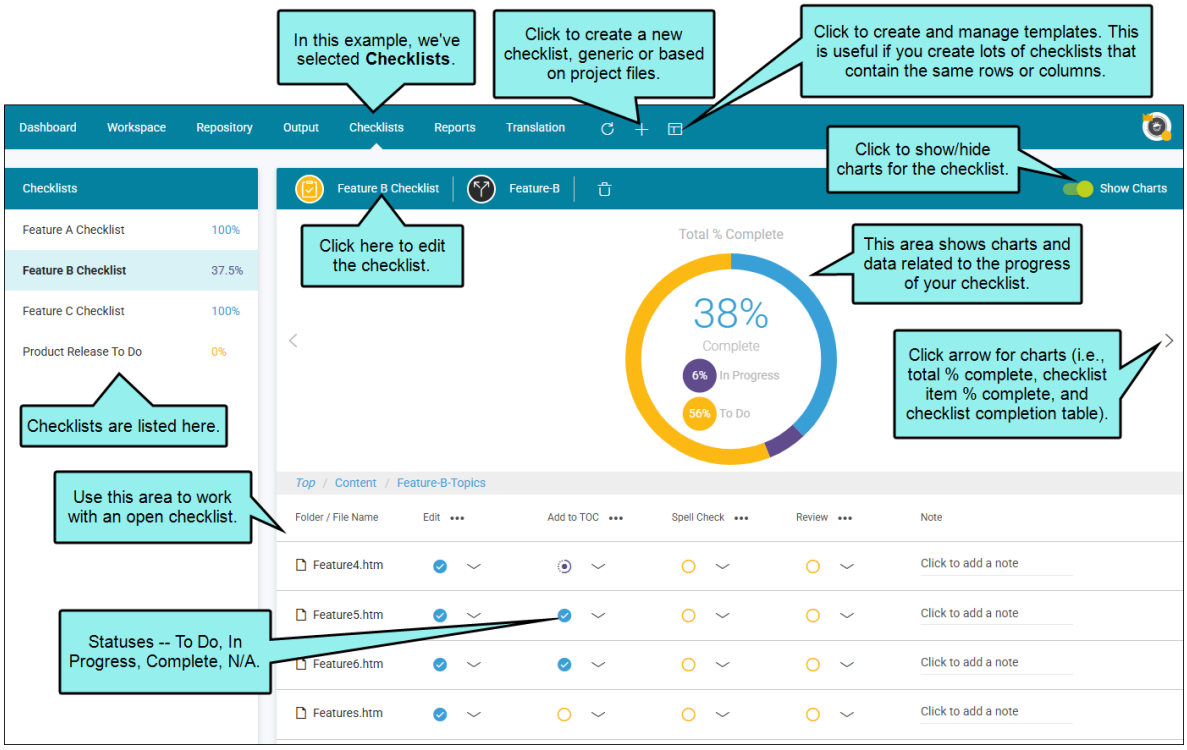
Checklists

You can create checklists to keep track of work related to your projects.

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.



For more details about checklists, see the Help system or the *Checklists Guide*.

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. .

For more details about reports, see the Help system or the *Reports Guide*.

> NOTE You can only have one branch selected at a time for a project. Since branching is supported for many features such as editing files, checklists, building output, etc., when you change pages in the workspace Flare Online maintains the last branch selected. The branch remains synchronized in the workspace every time a change occurs. For example, if you switch from a master branch to a feature branch in the Workspace page, and navigate to the Reports page, the same feature branch is selected, and vice versa. Knowing this, you can anticipate what branch will be used for the next scan in reports.

Translation

Translation is the process of converting text from one language to another. Flare Online supports the translation of content into various languages by letting you create and send projects out for translation directly in Flare Online. You can select to integrate the translation project with MadTranslations (the translation services division of MadCap Software), or to send it to a third-party translator. In addition, you can manage and monitor the status of a package or branch during the process. When you receive the translated project back, you can review it, and link to the translation branch for building and publishing output with Flare Online.



For more details about translations, see the Help system or the *Translation Guide*.

CHAPTER 4

Other Activities for Projects

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

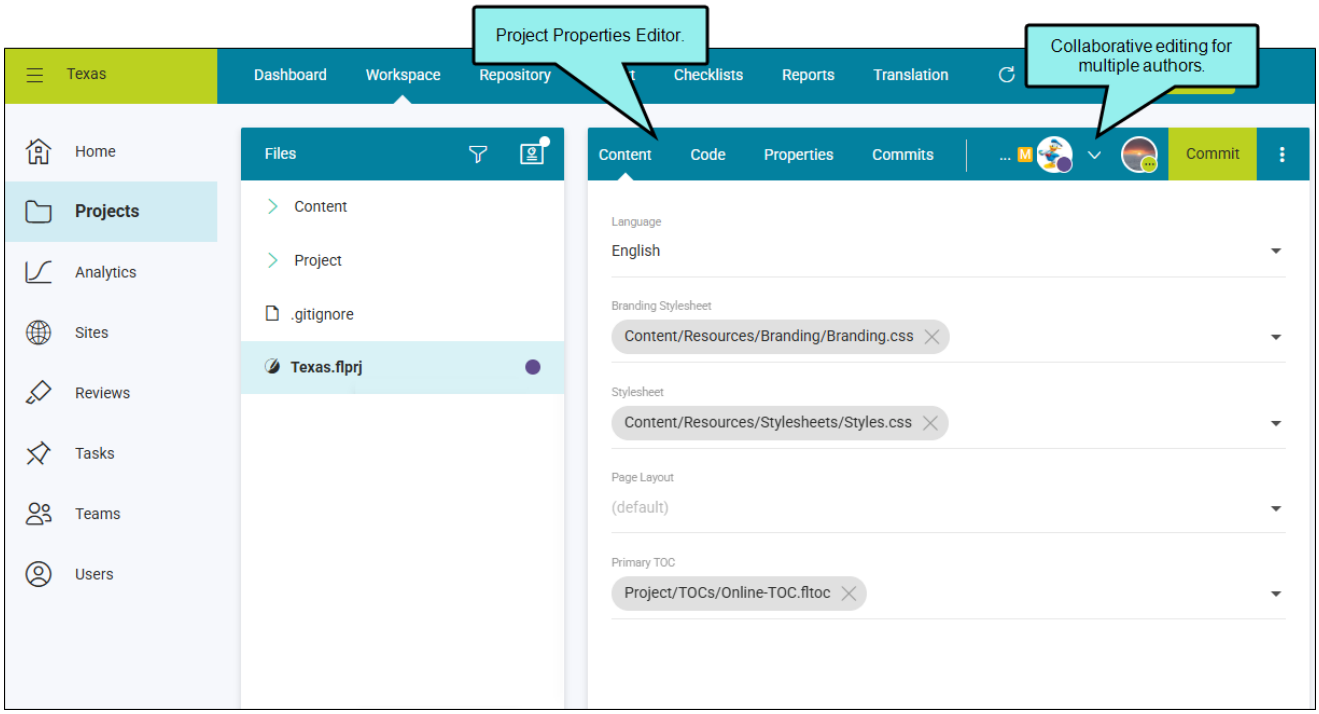
This chapter discusses the following:

Editing Project Properties 63
Editing Project Profiles 67
Viewing Project Profiles 70
Viewing Project Activity 71
Changing the Status of a Project 72
Selecting Multiple Projects 73
Setting Notifications for Projects 74
Accessing Other Projects 75
Deleting Projects 77
Renaming Projects 80

Editing Project Properties

Flare Online lets you edit the project file (FLPRJ) in a user-friendly Project Properties Editor. The editor is collaborative, meaning multiple users can make changes within the editor, and then retain all sets of updates when done.

If you click to edit the project file, it opens in the Content tab for easy editing. It enters a "workspace mode," making a working copy of the file from the repository. In this mode, the file is in a non-committed state with pending changes. When editing is completed, the file needs to be committed back to the project's repository.



Permission Required?

Editing content and project files is an activity available to users with the Author status. By default, users with Author status have the following permissions set:

- 

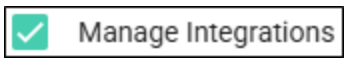
  If this is deselected, then viewing files in a read-only mode is allowed. On the left side of the page, the Files vertical three-dot menu is not available.

- 

  If this is deselected, the XHTML in the Code view is read-only.

  Editing code is regarded as a capability for an advanced user. If not done properly, the code can become malformed quickly. Administrators can prevent users from editing the code by deselecting the Edit Code permission.

In addition, AI Assist involves the following permissions:

- 

  This is required to integrate a ChatGPT account with a Flare Online license in the license settings.

- 

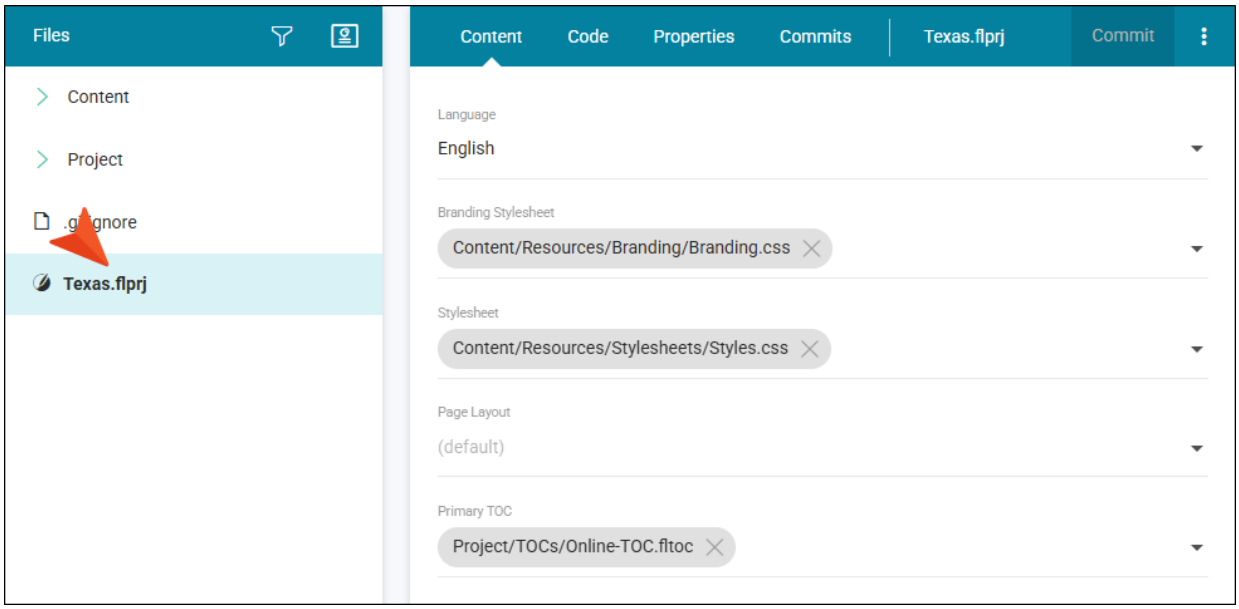
  This is required to use AI Assist (and therefore ChatGPT) when modifying topics and snippets.

  > NOTE Even if this permission is enabled, ChatGPT does not scan anything on your computer. The only information ChatGPT can acquire from you is what you enter manually into the prompt when using AI Assist. If your company has strict policies against AI or ChatGPT, simply do not use it.

For more information about permissions, see the Help system.

How to Edit Project Properties

1. On the left side of the Flare Online interface, click **Projects**.
2. Select a project to open it.
3. Click the **Workspace** tab at the top of the screen.
4. From the left side of the page, click the project file (FLPRJ). The Project Properties Editor opens.



5. From the drop-down fields in the editor, update the following properties for a project.
    - **Language** Select a language attribute for the project (the default is English). The language for the project affects the skin when building output, index file sorting, glossary stemming, the display of bi-directional languages in the editor. Even though you can set a language, this does not mean that Flare Online automatically outputs translated content.
    - **Branding Stylesheet** The branding stylesheet (Branding.css) specifically identifies values for branding elements for your project. When you add a new branding file to a project it ties the stylesheet to a project if you select it as your branding stylesheet. (The branding stylesheet can also be associated at the target level.)

- Stylesheet When you want to use styles in your content, the stylesheet needs to be made available for the content in question. If you associate a stylesheet at the project level the styles will be available for the content in the project. If you specify a stylesheet at the project level and another at a target level, the stylesheet at the target takes precedence.
- Page Layout Select to associate a single page layout with a project, where the same page layout will be applied to all topics in that project. This pertains to PDF and PowerPoint outputs. (A page layout can also be associated at the target level.)
- Primary TOC It is common to have one TOC for a particular output, or target where you would associate a TOC with the target. But you can have multiple TOCs in a project, and you can set the TOC at the target or project level. If you have specified a Primary TOC at the project level and another at a target level, the TOC at the target will take precedence. If you have a target with the TOC set to default, then the Primary TOC will be honored in the output.

6. Click Commit.
7. In the Create New Commit dialog, enter a Commit Message.
8. Click Commit. (Or click Cancel, to back out of the process.)

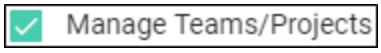
NOTE The profile holds project file information and settings that you can apply to a project (i.e., icon color, description, initials, name), and the project file from the workspace lets you change the properties. A key difference is where the information is written. The profile writes to the database, whereas the workspace writes to the file and is tied to Git.

Editing Project Profiles

You can edit the profile for a project. This includes the ability to change the project's name, initials, description, and associated color. You can also change which teams and/or users are associated with the project.

Permission Required?

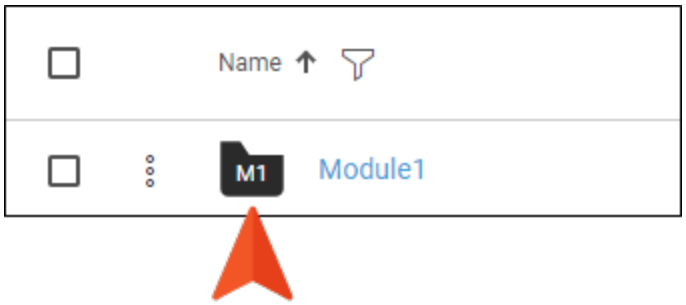
For this activity, you must have the following permission setting:



For more information about permissions, see the Help system.

How to Edit a Project Profile

1. On the left side of the Flare Online interface, click **Projects**.
2. Click the project avatar.



3. The Overview page provides an easy-to-read summary of the project's details. You can select options on the left side to make changes.
    - **Settings** Change the project's icon color, description, initials for the avatar, and name.
    - **Access** Use the tabs at the top of the dialog to view and modify teams and users associated with a project. The profile has efficient loading performance and easy editing, especially when there is a large set of data (e.g., 100 items of more). The dialog includes infinite scrolling, search, multi-select, etc.

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

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

    - **Activity** View the most recent actions that have taken place for the project.
    - **Delete** Remove the project from Flare Online.
    - **Dashboard** Open the Dashboard view for the project.
    - **Workspace** Open the Workspace view for the project.

- **Repository** Open the Repository view for the project.
- **Output** Open the Output view for the project.
- **Checklists** Open the Checklists view for the project.
- **Reports** Open the Reports view for the project.
- **Translation** Open the Translations view for the project.

4. Click **Save**.

Viewing Project Profiles

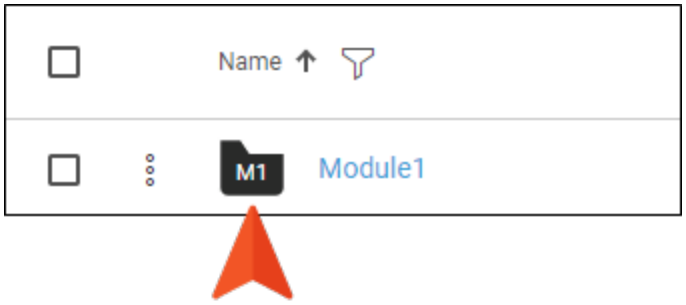
You can view the profile for a project to see its description, the teams and/or users associated with it, and recent activity. Depending on your permission settings, you can also edit it, delete it, or open one of the following views: Dashboard, Workspace, Repository, Output, Checklists, Reports, Translation, Project File.

Permission Required?

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

How to View a Project Profile

1. On the left side of the Flare Online interface, click **Projects**.
2. Click the project icon.



3. The Overview page provides an easy-to-read summary of the project's details. You can select options on the left side to see more information or make changes. See "Editing Project Profiles" on page 67.

Viewing Project Activity

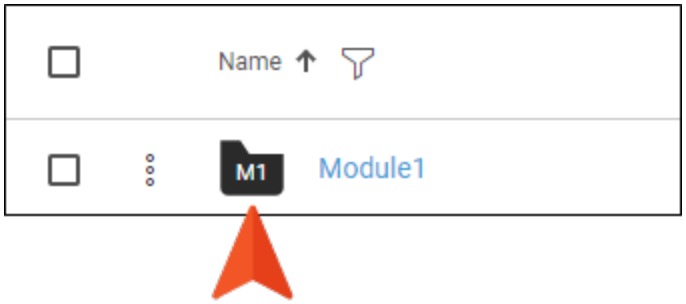
You can view the activity for a project to see what has been going on with it.

Permission Required?

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

How to View Project Activity

1. On the left side of the Flare Online interface, click **Projects**.
2. Click the project icon.



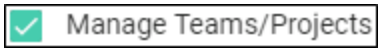
3. In the dialog, click **Activity**. The project activities over time are shown to the right.
4. (Optional) You can click any blue links or icons to view the related information. After scrolling down to the bottom, you can also click **Load More** if you want to see more entries.

Changing the Status of a Project

When you upload a project to Flare Online, it has a status of “Active.” If necessary, you can change the status to “Archive” or “Lock.” You can always change it back to “Active” later if you need to.

Permission Required?

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



For more information about permissions, see the Help system.

How to Change the Status of a Project

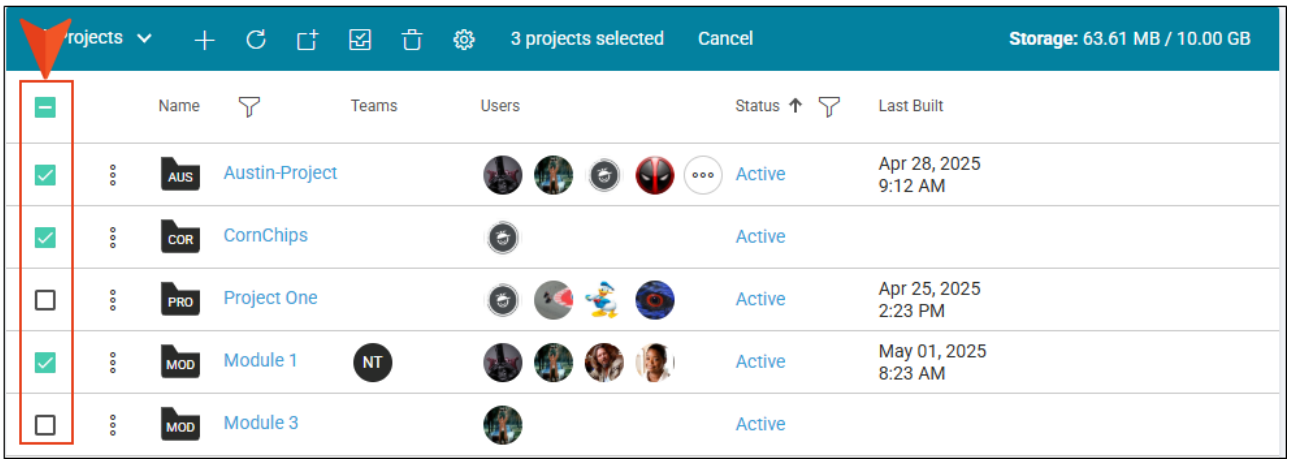
1. On the left side of the Flare Online interface, click **Projects**.
2. In the **Status** column on the Projects page, click the current status of the project. (Alternatively, click the check box to the left of the project row. Then in the local toolbar click .)

   The Set Project Status dialog opens.
3. Click in the drop-down field and choose the status you want to set:
   - **Activate** If you have previously archived or locked a project, you can select this option to return it to an “Active” status.
   - **Archive** You might archive a project if you want to keep a copy of the files in the cloud, but you no longer need the output. An archived project cannot be opened or viewed, and all outputs become inaccessible. If you have a site set to “live,” you cannot archive the associated project unless you first remove the “live” setting.

     If you archive a project, all data is preserved. All access will be denied to the project until it is reactivated.
   - **Lock** You might lock a project if you do not want any more changes made to the project, but you need to retain the output, particularly any sites set as “live.” When a project is locked, it becomes read-only.
4. Click **Save**.

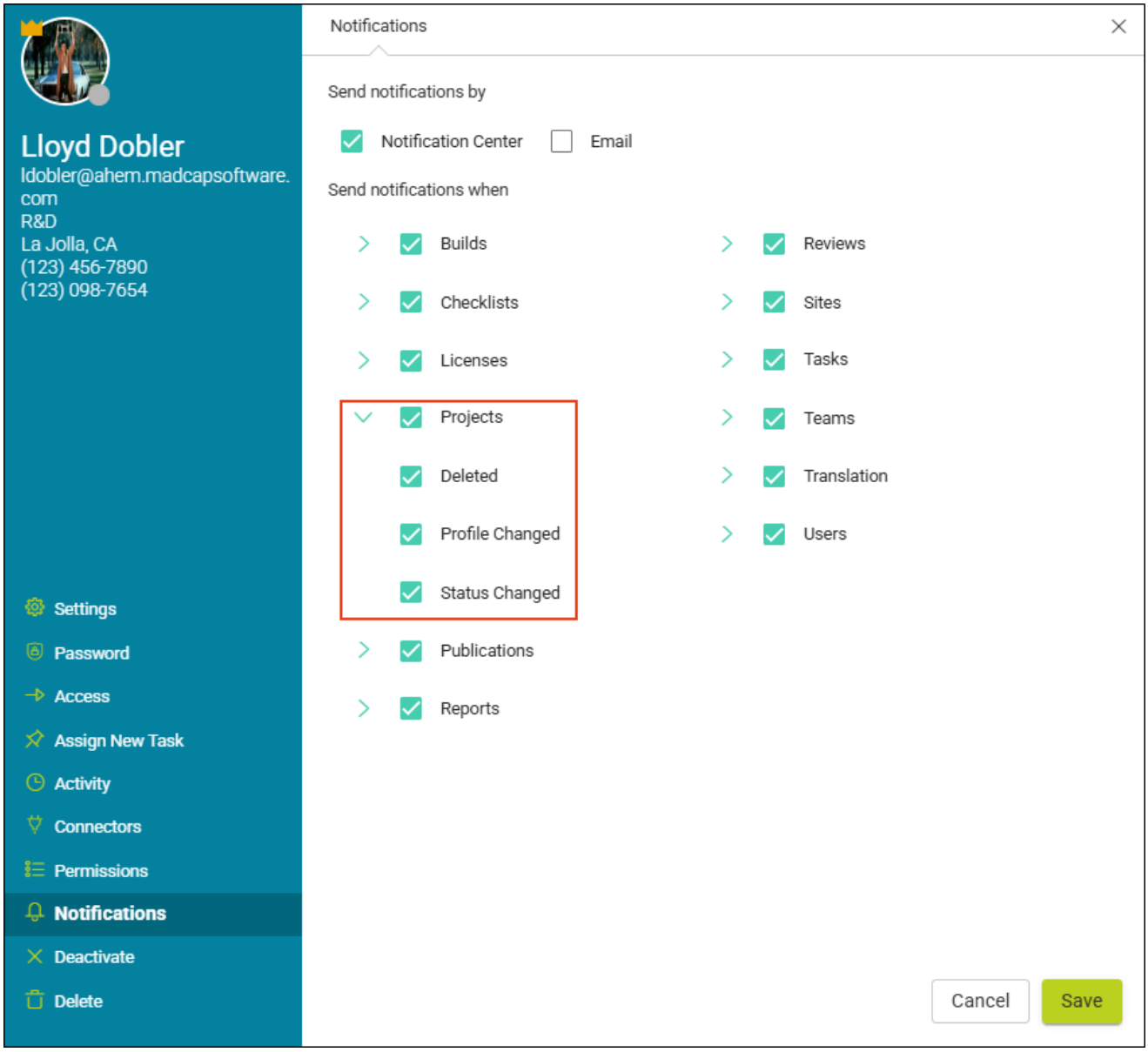
Selecting Multiple Projects

In the Projects page grid, you can use check boxes to select one or more projects. After doing this, you can perform the same action on those projects simultaneously (e.g., add widgets to their dashboards, set status, delete).



Setting Notifications for Projects

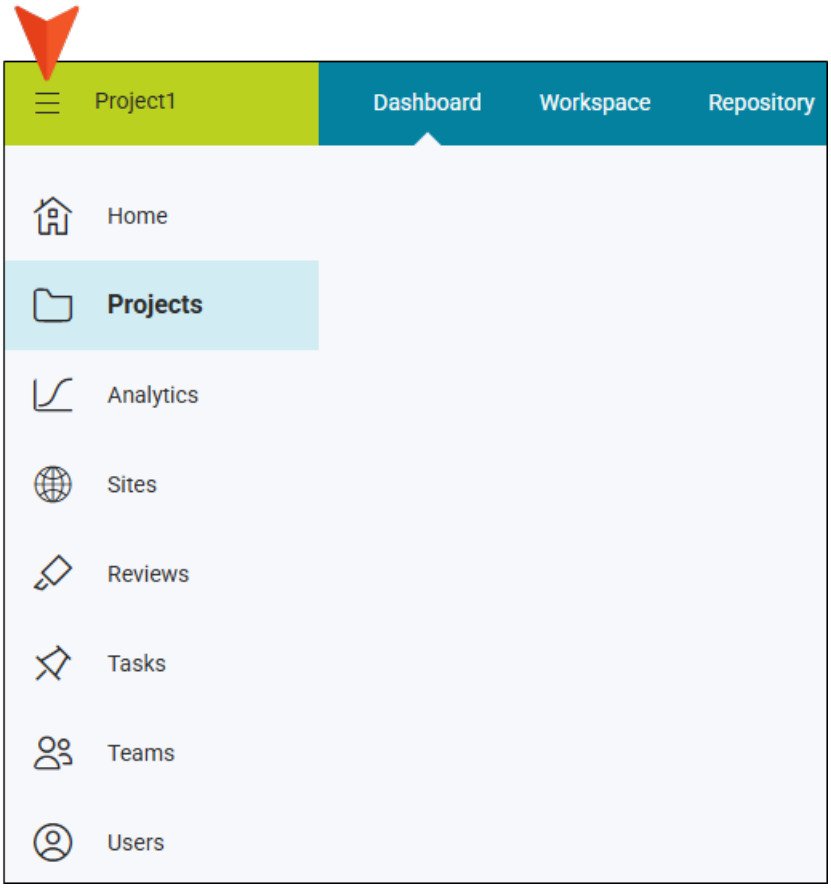
In your account settings, you can choose when to be notified for specific activities. The user who is notified depends on the activity. For more information, see the Help system.



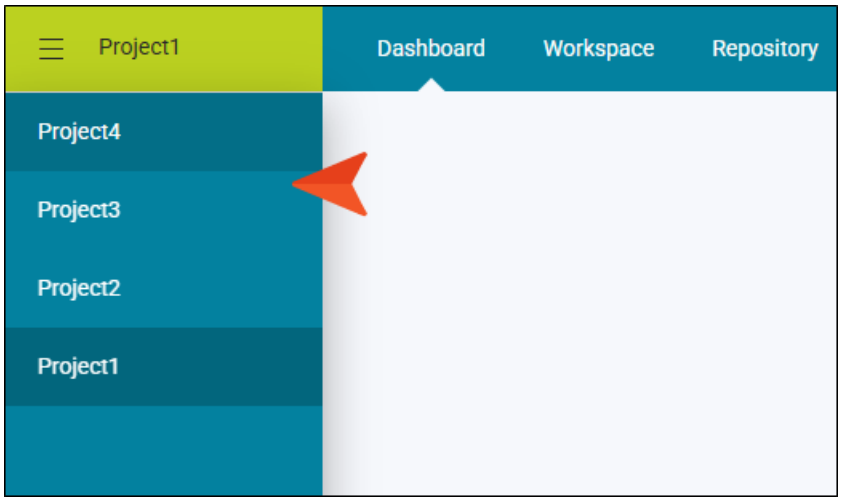
You can also set notifications for project builds and publications, checklists, reports, reviews, translation, and more.

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.



Deleting Projects

If you no longer need to keep a project, you can remove it. Doing this does not delete your local copy of the project in Flare Desktop (if you have one); it only removes the project files from Flare Online. All access will be denied to the project and all data associated with the project will be deleted. This frees up space on your license.

Permission Required?

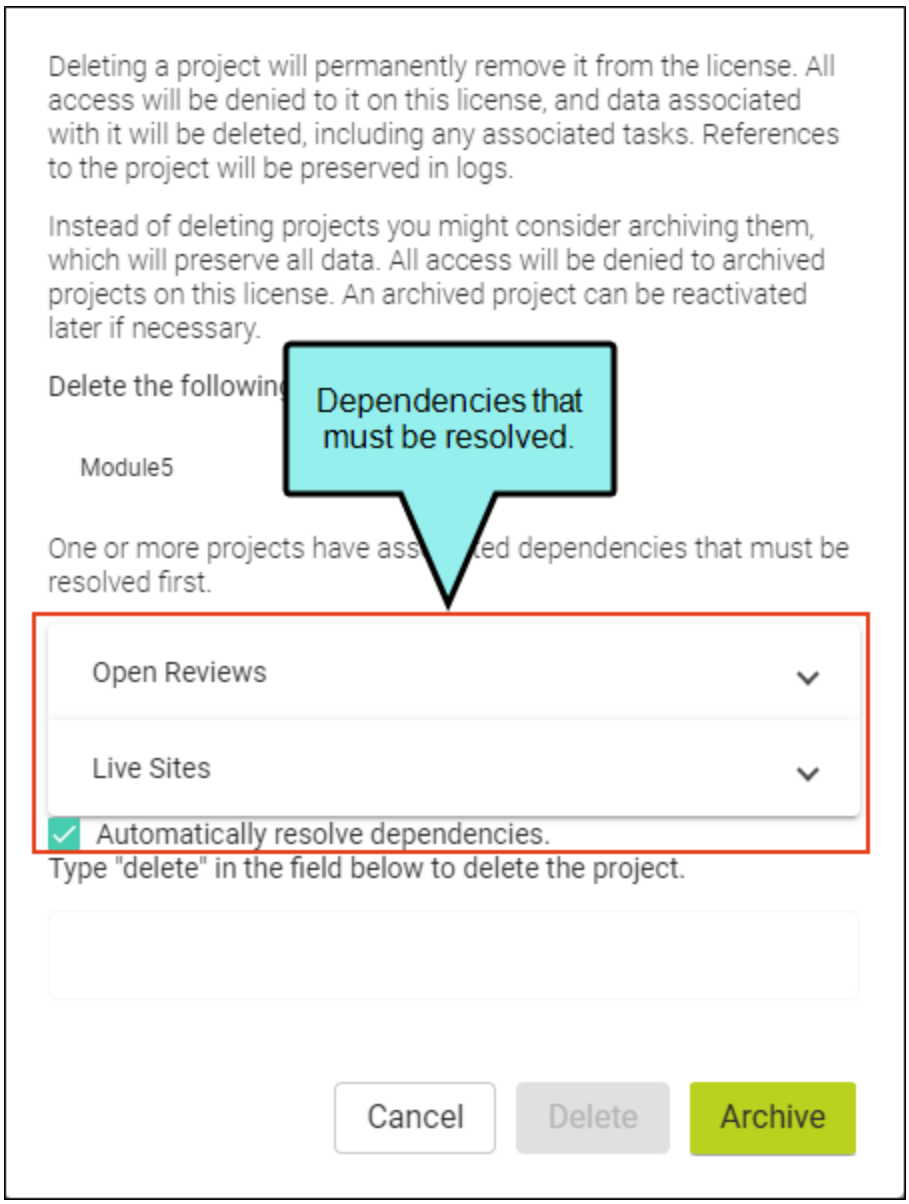
For this activity, you must have the following permission setting:



For more information about permissions, see the Help system.

How to Delete a Project

1. On the left side of the Flare Online interface, click **Projects**.
2. In the grid, click the check box to the left of the project row. Then in the local toolbar click .
3. If the project is associated with any live sites or pending reviews, a drop-down displaying the dependencies is shown in the dialog.



You can open the drop-down(s) to view the files or sites in question. Click **Automatically resolve dependencies** if you want Flare Online to close the reviews and/or remove the live site associations. If you do not select this check box, you cannot continue with the deletion.

4. Click in the field at the bottom (under the least piece of text), and type `delete`. Then click **Delete**.

> **IMPORTANT** This extra action is necessary as a precaution, because once a project is deleted, it is permanently removed with no recovery.

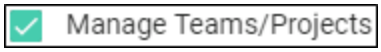
> **NOTE** As an alternative to deleting a project, you might consider archiving it instead. If you archive a project, all data is preserved. All access will be denied to the project until it is reactivated. See "Changing the Status of a Project" on page 72.

Renaming Projects

There are a couple of ways to rename a project. You can rename the project in Flare Online only in order to modify how it is displayed in the interface. You can also change the name of the actual project file (FLPRJ) in both Flare Online and Flare Desktop. You might even want to perform both sets of steps below so that the project name is the same everywhere.

Permission Required?

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

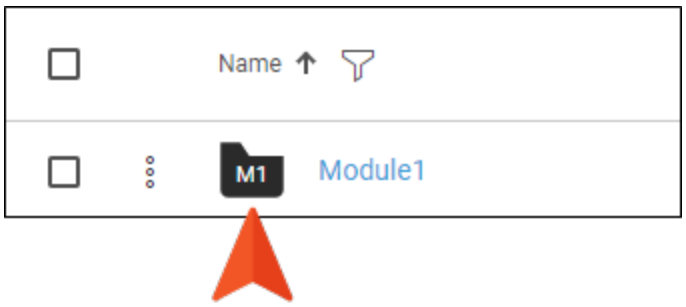


For more information about permissions, see the Help system.

How to Rename the Project in Flare Online (Interface Display)

Changing the project name in Flare Online is easy, but doing this will not also change the name of the project locally in Flare Desktop. It only affects how the project name is displayed in various places in the Flare Online interface; if you open the Workspace view for the project, you will see that the Flare Desktop FLPRJ file still has the original name.

1. On the left side of the Flare Online interface, click **Projects**.
2. Click the project icon.

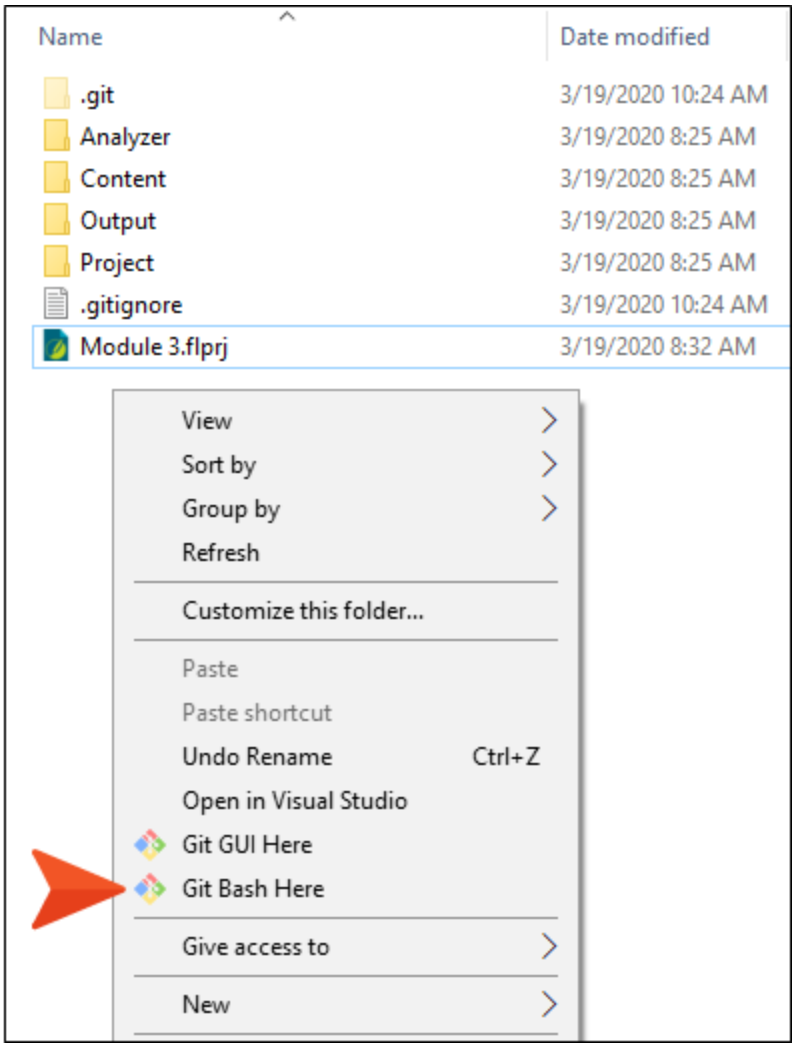


3. Select **Settings**.
4. In the **Name** field, change the name for the project.
5. Click **Save**.

How to Rename the Project in Flare Online and Flare Desktop (File Name)

This requires you to perform steps outside of Flare Desktop and Flare Online. You need to use Windows and Git Bash for synchronizing the new name between Flare Desktop and Flare Online.

1. Close the local project in Flare Desktop, and open Windows to the location where the project is stored.
2. Rename the FLPRJ file.
3. Right-click in an empty area of Windows (not on a file or folder), and from the context menu select Git Bash Here.



4. In Git Bash type `git add -A` and press ENTER.

```
al Projects/Prod/Mod 3 (master)
$ git add -A
```

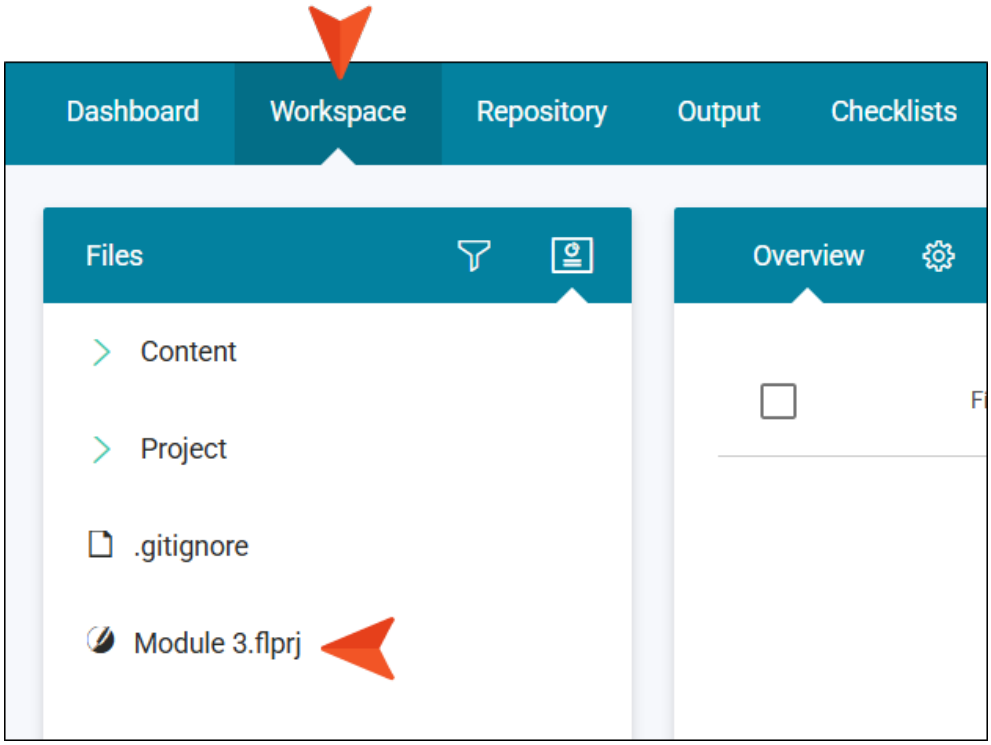
5. Type `git commit -m "My comment"` and press ENTER. (The text in quotes can be any comment you want to enter.)

```
al Projects/Prod/Mod 3 (master)
$ git commit -m "My comment"
```

6. Type `git push` and press ENTER.

```
al Projects/Prod/Mod 3 (master)
$ git push
```

In Flare Online, you will notice on the Workspace page view for the project that the new name is shown.



CHAPTER 5

Source Control

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. Git is the source control solution that works behind the scenes to integrate Flare Desktop with Flare Online.

For detailed information about source control in Flare Online, see the Help system or the *Source Control Guide*.

NOTE If an author needs to work with the project in Flare Desktop after it is created in Flare Online—because advanced features are needed for the project—the user needs to (1) have access to the project, and (2) open Flare Desktop and import the project from Flare Online. If additional changes are made in Flare Desktop or Flare Online, the work would need to be synchronized between the local and remote repositories.

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