madcap software

USER GUIDE

MADCAP FLARE ONLINE

Reports Guide

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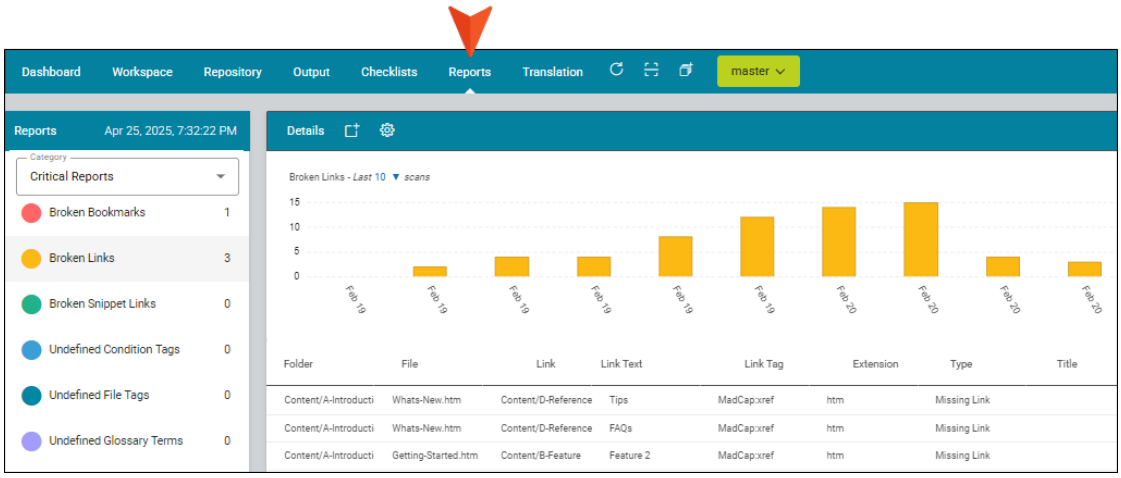
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CHAPTER 1

Introduction

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. .



Main Activities and Information

- "Opening the Reports Page" on page 7
- "Automatic or Manual Scans" on page 12
- "Selecting and Viewing Reports and Statistics" on page 14
- "When a Scan Shows Critical Issues" on page 24

- "Report Widgets" on page 25
- "Setting Notifications for Reports" on page 32

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.

CHAPTER 2

Opening the Reports Page

You can access the Reports page after opening a project in Flare Online, or by using a widget.

This chapter discusses the following:

Permission Required? 7

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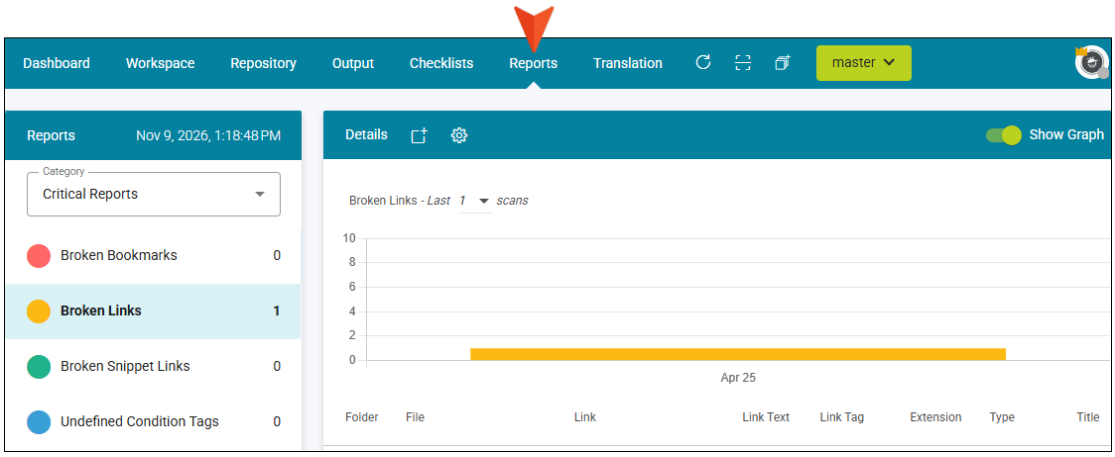
Permission Required?

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

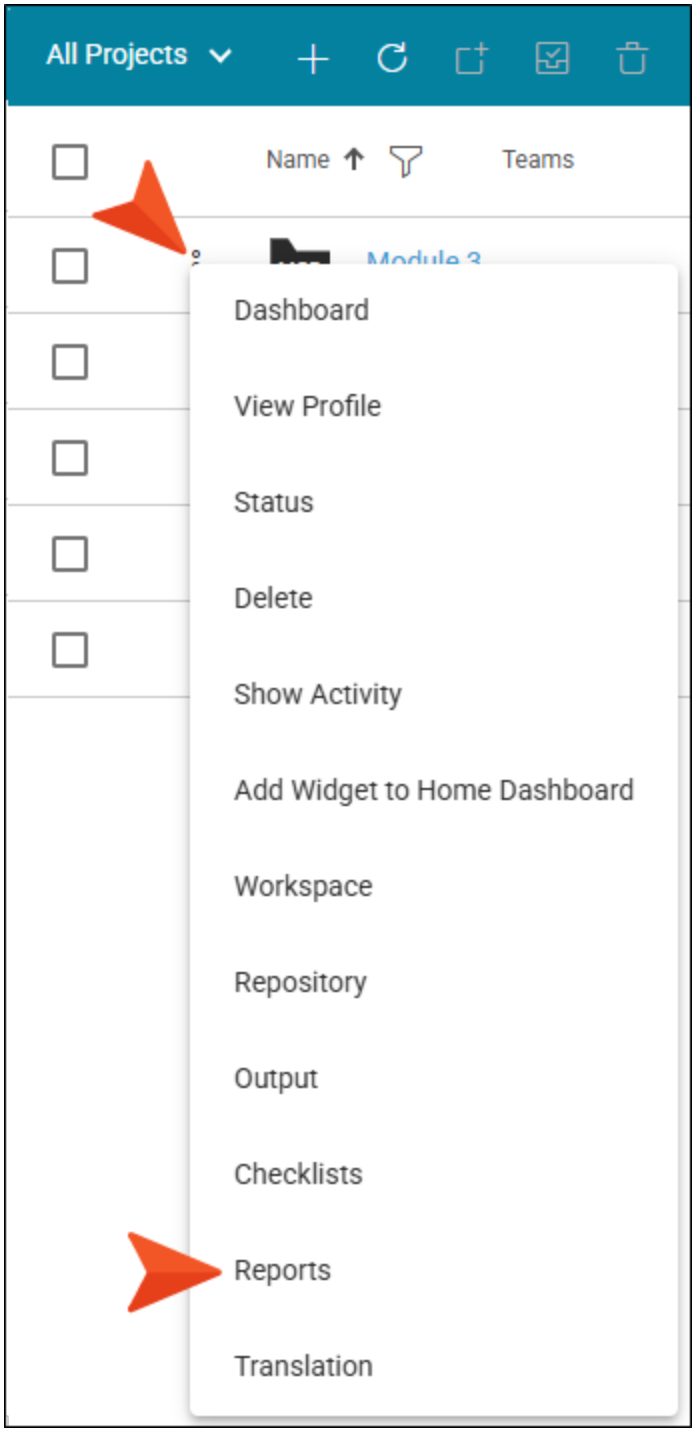
Methods for Opening the Reports Page

There are multiple ways to open the Reports page to view it:

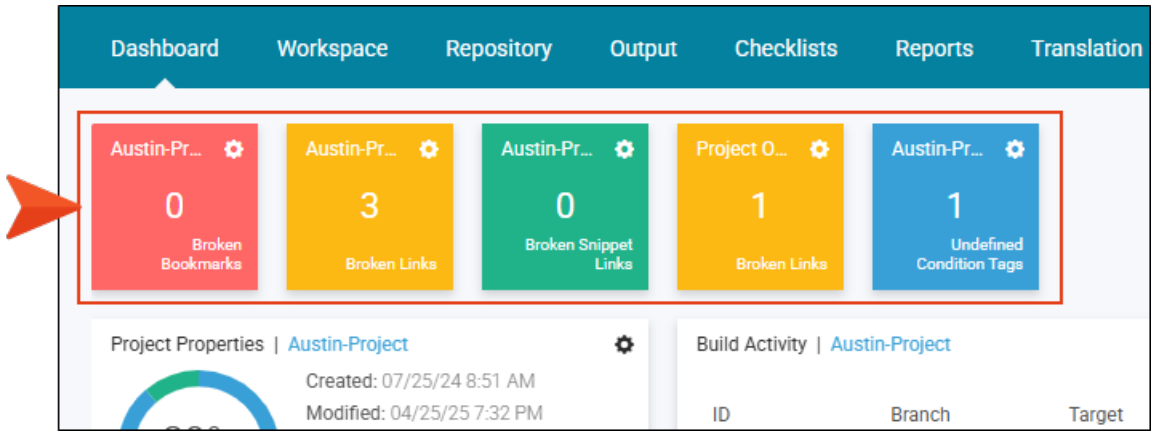
- **Reports Option on Projects Page** After opening a project in Flare Online, you can click **Reports** at the top.



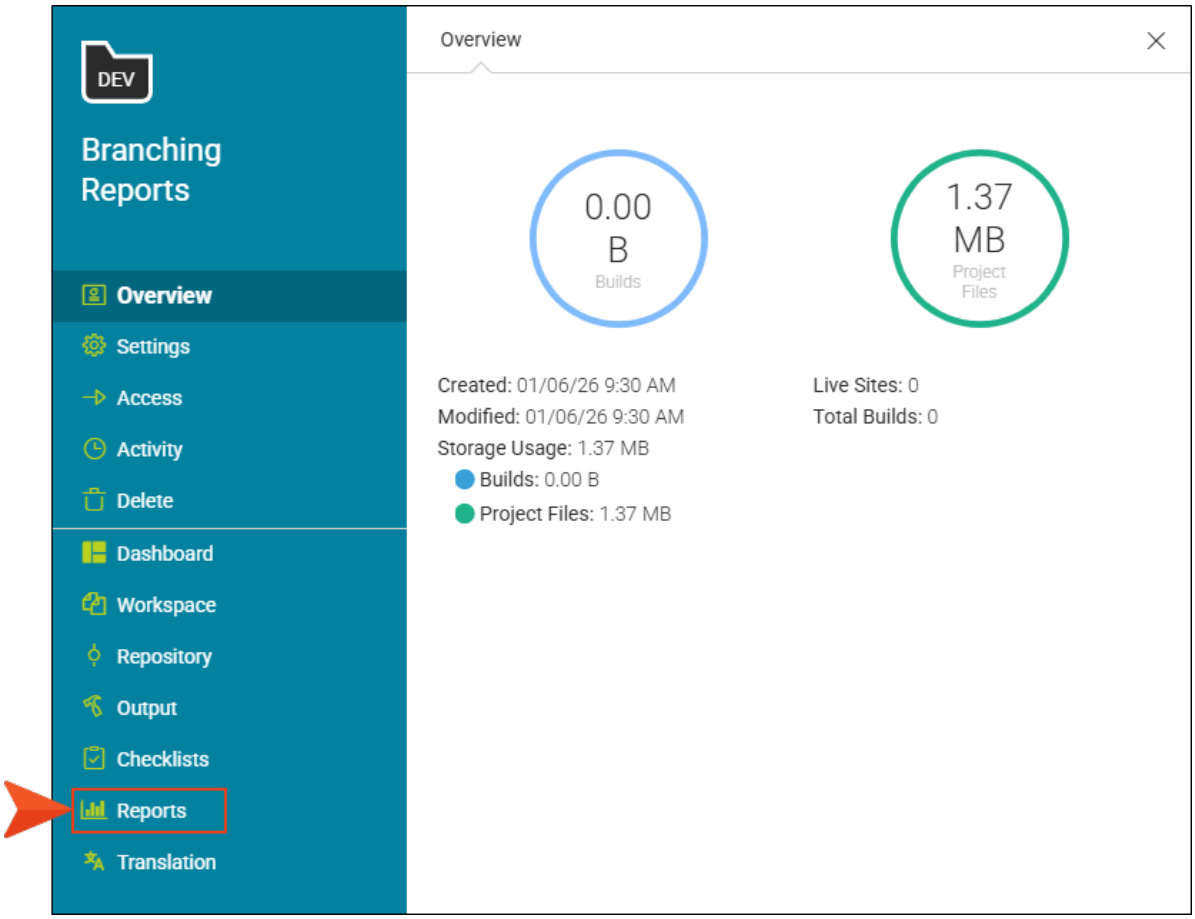
- **Project Grid Context Menu** On the Projects page, you can click the three dots ⋮ on the left side of the row and select **Reports**.



- **Report Widgets** If you have added Report widgets to a dashboard, you can click any of the square objects related to a specific type of report.



- **Project Profile** On the Projects page, you can click the project avatar to open the Project profile. From the dialog, you can click **Reports** on the left to open the page.

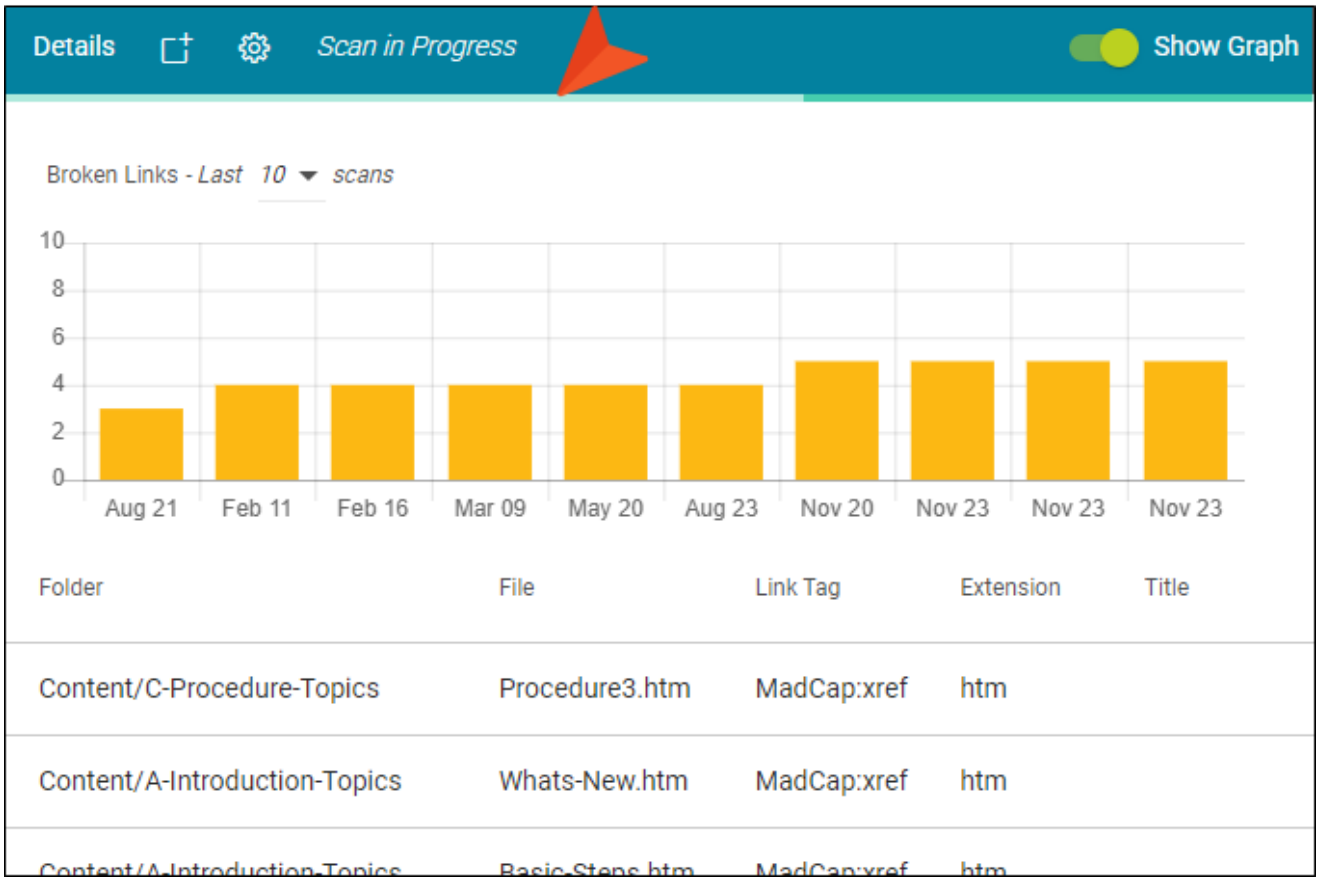


NOTE A refresh button is available in the toolbar on the Reports page. This option is not necessary to populate the chart and grid. However, the project activity sometimes does not automatically refresh after a scan; therefore, you can click the refresh button to update it.

CHAPTER 3

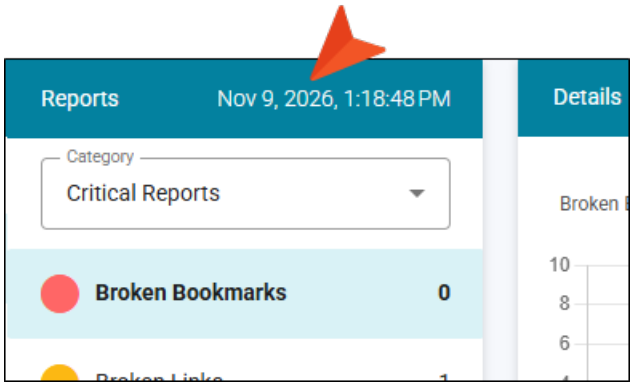
Automatic or Manual Scans

A project scan automatically initiates if a change to a source file has been committed to the project's repository. This is true for any branch you might be working with. While the scan is in process, a green progress bar moves across the top.



When you no longer see the green bar, the scan is finished. Larger projects take longer to scan.

The last time the project was scanned is indicated in the upper-left part of the page, next to the Reports pane heading.



You can also click in the main toolbar to initiate a scan manually whenever you like.

> NOTE You do not need permissions to open the Reports page or to view results of the automatically launched scan of the project. However, if you want to start a scan manually, you need to have the Scan permission..

> NOTE This feature is currently limited to projects smaller than 1 GB. Projects larger than that will not be scanned for reports or statistics.

CHAPTER 4

Selecting and Viewing Reports and Statistics

From the Reports page, you can open various kinds of reports and statistics to view details.

This chapter discusses the following:

Permission Required? 14

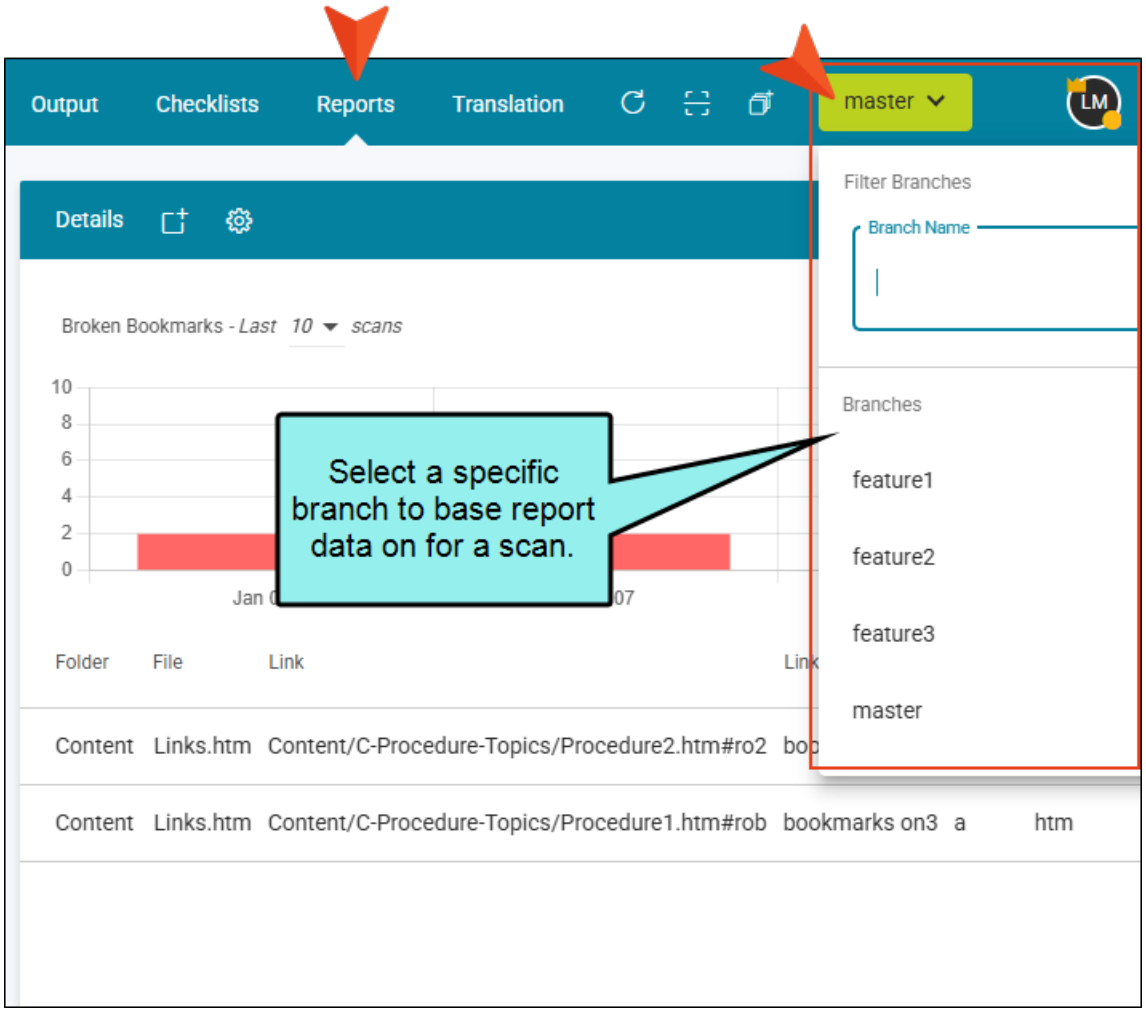
How to Select and View Reports and Statistics 15

Permission Required?

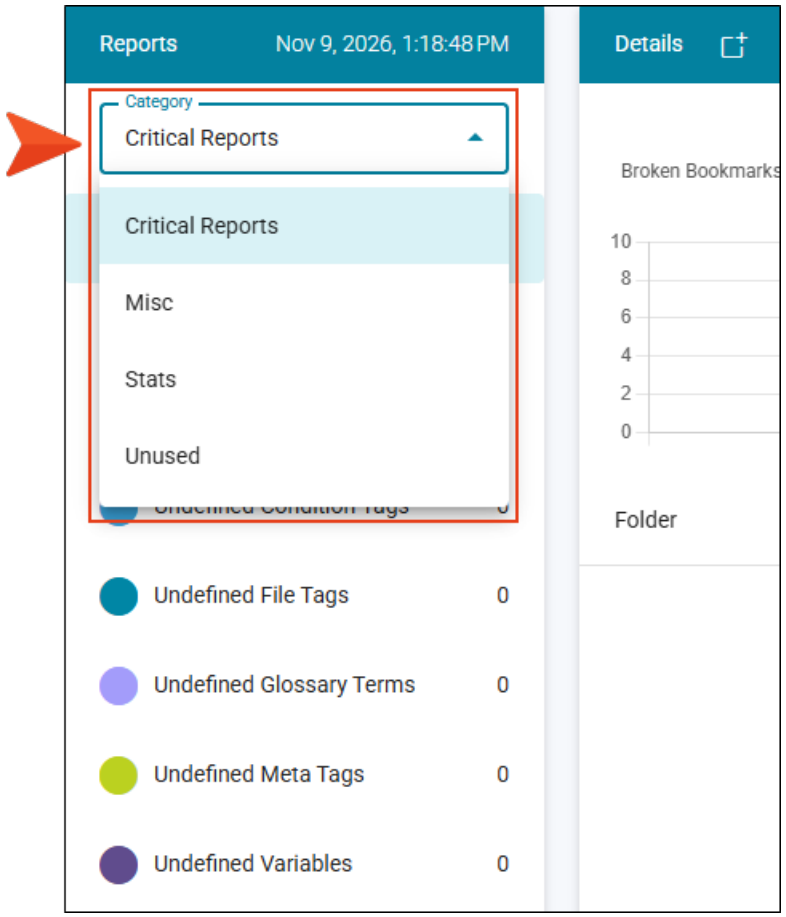
No special permission is required for this activity. All authors who are associated with the project are allowed.

How to Select and View Reports and Statistics

1. From the top of the interface, select a branch from the drop-down to see report data for that branch specifically.



2. On the Reports page, select a report category from the drop-down. You can select Critical Reports, Misc, Stats, or Unused. From that category, choose your report. The data shown defaults to the last branch selected.



NOTE If you want to learn more about the features mentioned in these reports that are not created in Flare Online, please refer to the Flare Desktop Help.

CRITICAL REPORTS

These reports that are considered "critical," in that your output will contain missing or incorrect information if you do not fix the issues.

- Broken Bookmarks These are links to bookmarks that are broken. In Flare Desktop, you need to fix the issue (e.g., remove or replace the bookmark link).
- Broken Links These are links—such as cross-references—that are broken. In Flare Desktop, you need to fix the issue (e.g., remove or replace the link).
- Broken Snippet Links These are links to snippets that are broken. In Flare Desktop, you need to fix the issue (e.g., remove or replace the snippet).
- Undefined Condition Tags These are conditions that have been applied in the project, but the name or location of those conditions cannot be found. This might occur, for example, if you have applied a condition in a topic and then later change the name of the tag or condition tag set. The old tag or set name is still used at the location where it was previously applied in the topic. In Flare Desktop, you need to fix the issue (e.g., rename the condition tag or set, remove the tag where it was applied).
- Undefined File Tags These are file tags that have been applied in the project, but the name or location of those file tags cannot be found. This might occur, for example, if you have associated a file tag with a topic and then later change the name of the tag or file tag set. The old tag or set name is still used for the topic. In Flare Desktop, you need to fix the issue (e.g., rename the file tag or set, remove the tag where it was applied).
- Undefined Glossary Term Links These are glossary term links in your content that are broken. This might occur, for example, if you have created a new term in a glossary and then inserted that term into a topic as a glossary term link. Later, you remove that term from the glossary. You now have a glossary term link in a topic, but the term no longer exists in the glossary. In Flare Desktop, you need to either remove the glossary term link from the content, or you need to add the term to the glossary again.
- Undefined Meta TagsThese are meta tags that have been used in your project, but those meta tags have not been defined. This might occur, for example, if you have applied a meta tag to a file and then later change the name of the tag or meta tag set in the Text Editor.
- Undefined Variables These are variables that have been inserted in the project, but the name or location of those variables cannot be found. This might occur, for example, if you have inserted a variable in a topic and then later change the name of the variable or variable set. The old variable or set name is still used at the location where it was

previously inserted in the topic. In Flare Desktop, you need to fix the issue (e.g., rename the variable or set, remove the variable where it was applied).

MISC

- Cross-Reference Suggestions These are links in a project that you might want to convert to cross-references. For example, if you have regular text hyperlinks (<a> tags), you might want to convert them, because cross-references change dynamically and are therefore usually preferred over text hyperlinks.
- Duplicate Map IDs These are IDs that are used in context-sensitive Help (CSH) that are identical.
- Duplicate Meta Tags These are meta tags that have been applied to files throughout your project and whose values are defined two or more times in the same file. However, the same meta tag name *is allowed* in different meta tag sets.
- Duplicate Styles These are styles in your project where the same properties have been set. For example, let's say you have a style called "p.tip" and another style called "p.note." If you have specified the same settings for each of these styles (e.g., red font, 12 pt), with no other properties set, these styles will be included in the Duplicate Styles report. If you encounter duplicate styles, you may want to modify the settings for one or both styles, or you can remove one of the style classes from the stylesheet.
- Duplicate TOC Items These are files in your project that have been added more than once to a table of contents (TOC).
- Files With Equations These are files where equations have been inserted.
- Files With QR CodesThese are files where QR codes have been inserted.
- Files With Snippet Conditions These are files where snippet conditions have been applied.
- Invalid Meta ValuesThese are files containing meta tags that have invalid values. For example, an invalid meta tag might occur if you remove a meta tag's list item from the meta tag set file. In a case such as this, you can resolve the issue by adding the list item back to the meta tag set, or re-associating the files with a different value.
- Non-XML TopicsThese are non-XML files (e.g., HTML files) that have been added to your project.

STATS

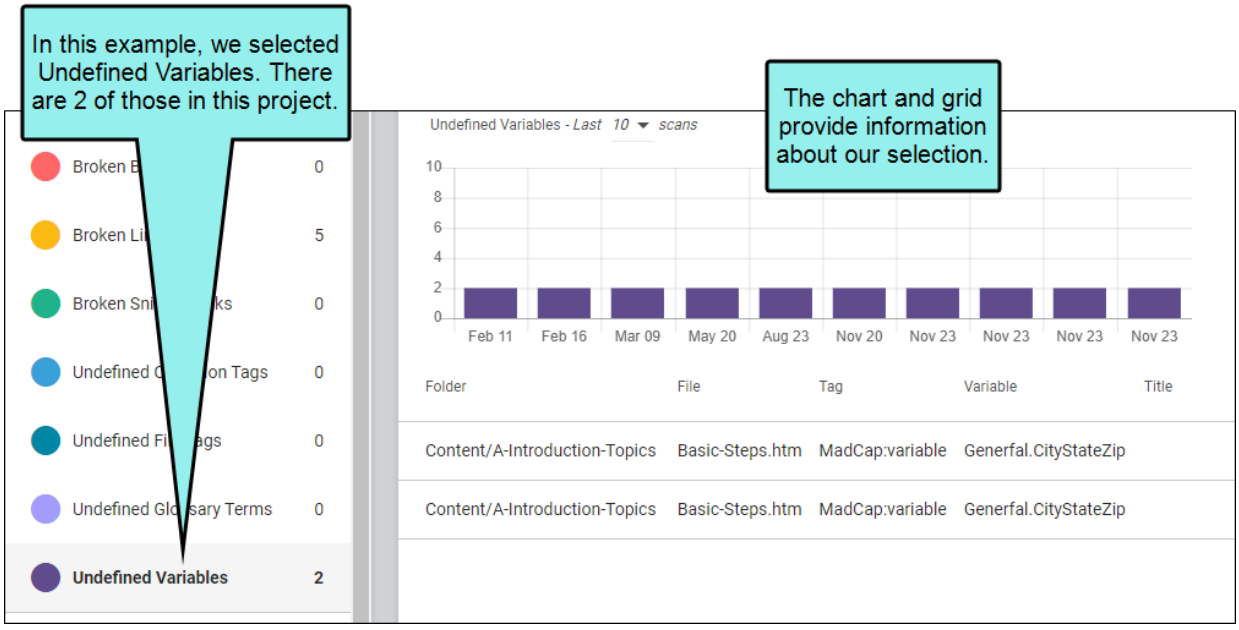
In addition, you can view statistics (i.e., the count) for the following in each project:

- Images
- Segments (i.e., phrases or sentences)
- Snippets
- Topics
- Words

UNUSED

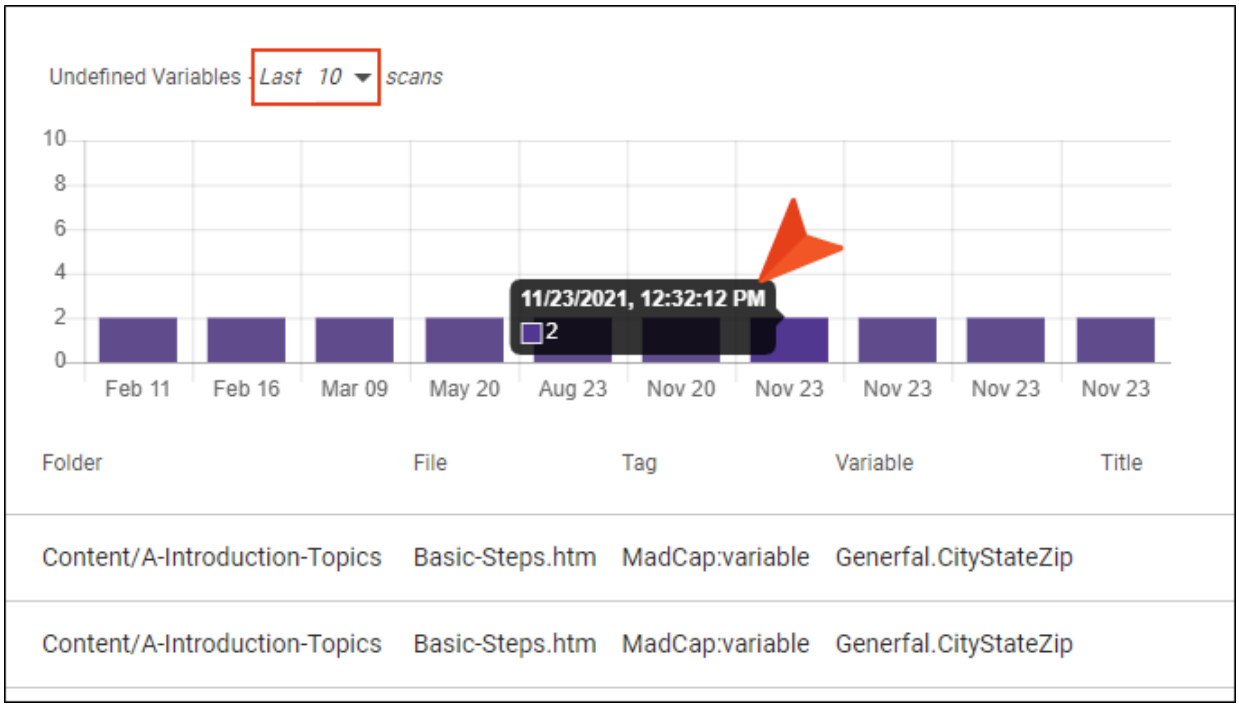
- Unused Bookmarks These are bookmarks that have been inserted in content files, but there are no links in that file or any others pointing to that bookmark.
- Unused CSH IDs These are context-sensitive Help (CSH) identifiers that have been created in your project but have not yet been assigned.
- Unused Images These are images that have been created in your project but have not yet been used in any topics or other files.
- Unused Multimedia These are multimedia files (e.g., videos) that have been added to your project are not being used in any topics or other files.
- Unused Snippets These are snippet files that have been created in your project but have not yet been used in any topics or other files.

3. To see data for a particular report or statistical category, click it. The area to the right is then populated with a chart and grid.

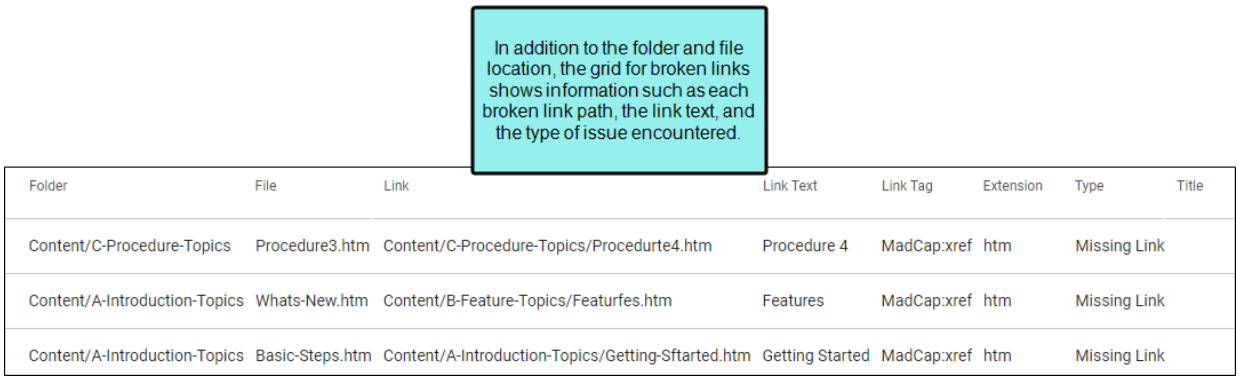


The chart shows a count history of the item, with each bar representing a different push of changes to Flare Online. You might see many bars with the same date, because you might have pushed changes to Flare Online multiple times throughout the day.

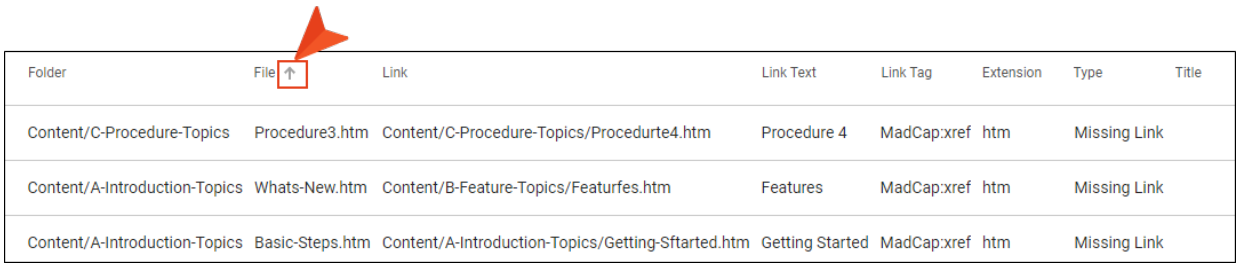
A drop-down lets you choose how many of the most recent scans to show in the chart (e.g., 1, 10, or 25). If you hover over a bar, the date, time, and count shows for a particular scan of the selected item.



Unlike the chart, the grid below it does not show a history of pushes. Instead, it shows results for the most recent scan and displays all of the instances of the selected item in the project. For example, if you selected the Broken Links report, each row of the grid will show a broken link that was found in the latest scan of the project. The Folder and File columns on the left tell you where the issue was found. The rest of the columns are different for each type of report and provide information to track down the problem.

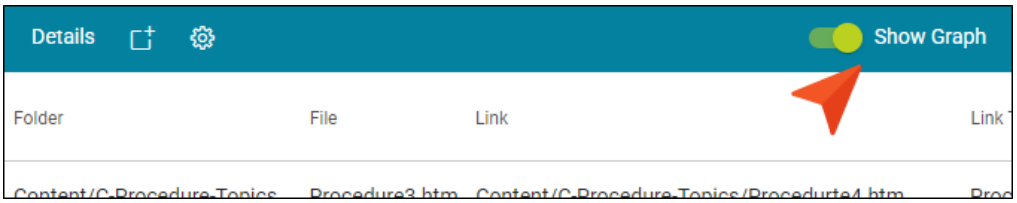


Hover to the right of any column heading for an arrow to display. Click the arrow to sort the information according to that column.



When you select a statistical category, the grid will show a count history for all of the categories. However, the chart above represents the count history for only the selected item.

NOTE The chart and grid show by default for a particular report. You can hide the visual display of the chart by clicking the Show Charts option.



CHAPTER 5

When a Scan Shows Critical Issues

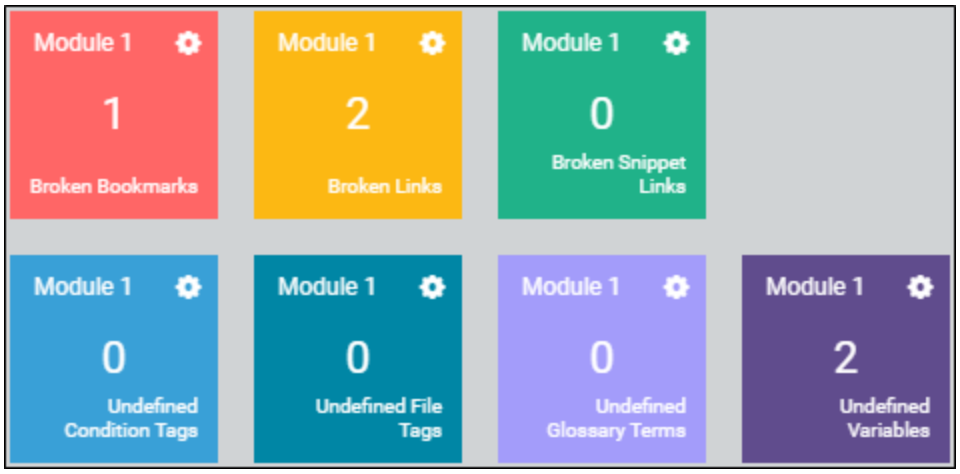
When you view a report and notice critical issues, you should do the following:

1. Use the report to identify the location in the project where the issue exists.
2. Open Flare Desktop and fix the problem.
3. Commit and push your changes to Flare Online.
4. Open the Reports page again and ensure that no more critical issues are present. (Alternatively, you can use the Analysis ribbon in Flare Desktop to see the updated reports.)

CHAPTER 6

Report Widgets

You can add Report widgets to your Home or Project dashboards, based on any of the critical reports. Each widget is a small square with a number that indicates the number of issues found in the project.

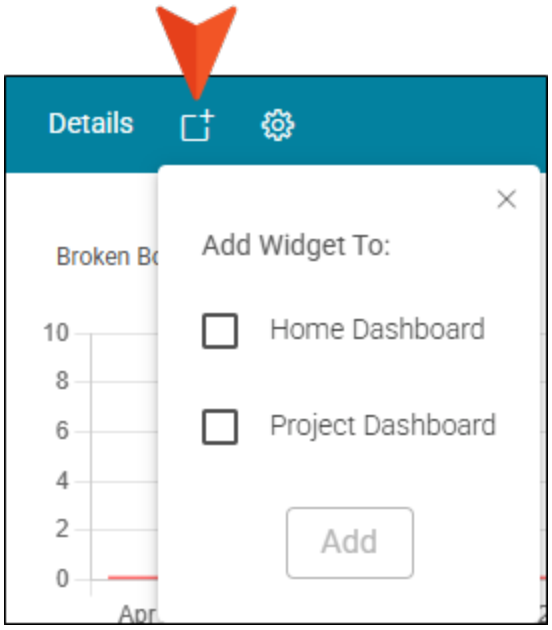


This chapter discusses the following:

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How to Add Report Widgets

1. Open the Reports view, and in the toolbar click . From the context menu, you can select to add the widget for the active report to the Home or Project dashboard(s).



Alternatively, you can click this same button in the toolbar of the Home or Projects dashboard.

> TIP In the main toolbar you can click to add multiple report widgets to the Home or Project dashboard(s).
>
> It is recommended to use this option in the Reports view because it lets you add widgets for multiple kinds of critical reports at the same time. On the other hand, if you are on a dashboard, you will need to repeat the steps for adding each type of report, plus you will need to filter each blank widget afterward to choose a report for it.

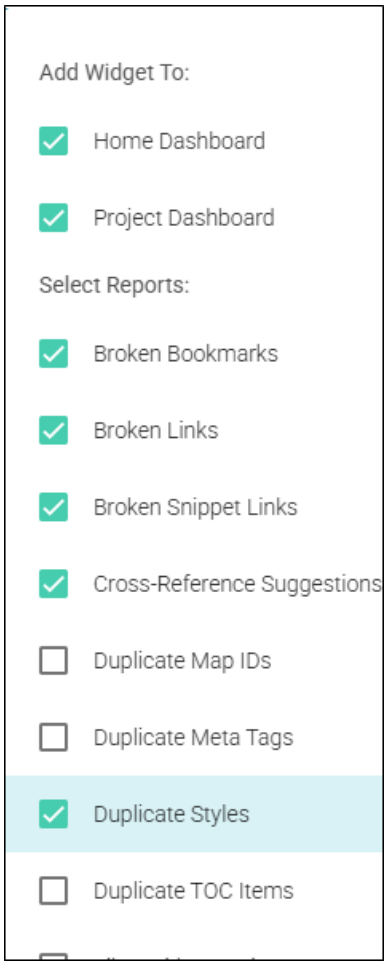
2. Do one of the following in the dialog that displays, depending on the method you are using:

METHOD 1: REPORTS VIEW (RECOMMENDED)

If you click in the Reports view, select **Home Dashboard**, **Project Dashboard**, or both, depending on where you want to see the widgets.

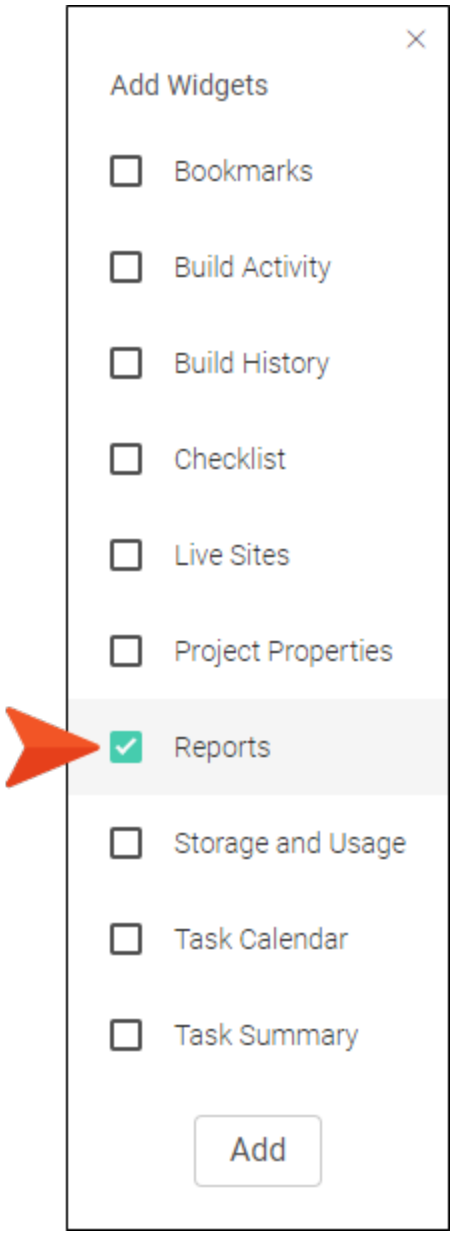
Then, below those selections, choose which types of reports you want to include in widgets.

At the bottom of the selection dialog, click **Add**.



METHOD 2: HOME OR PROJECT DASHBOARD

If you click on a dashboard, select **Reports** and click **Add**.



Repeat these steps for each type of report widget you want to add to a dashboard.

If you used the Reports view method, you can go to the dashboard, then click and drag the widgets to move them where you want them.

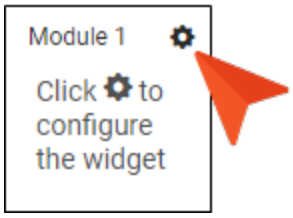
If you used the Dashboard method, the new widgets are initially empty. You need to filter them in order to choose report types. After this, you can click and drag the widgets to move them where you want them on the dashboard.

Regardless of the method, keep in mind that you might need to scroll down to see your new widgets if existing widgets are already taking up all the space toward the top of the dashboard.

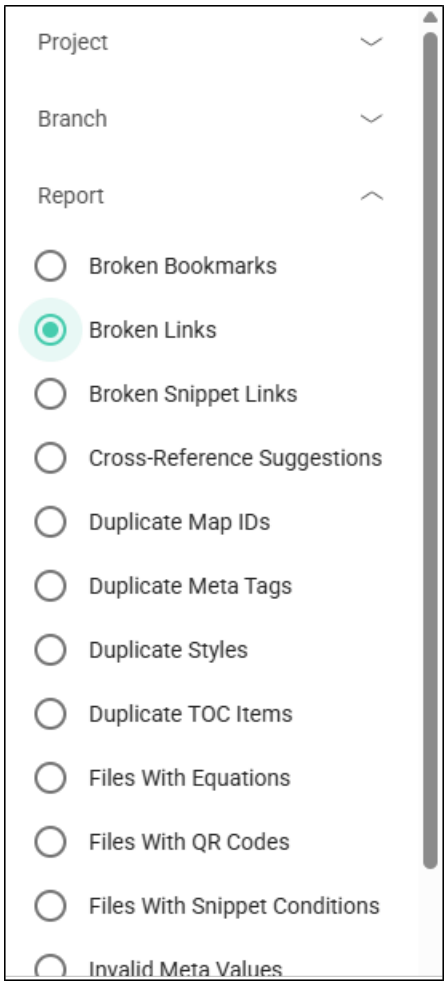
How to Filter Report Widgets

If you added a widget from the Reports view, it should be populated already. But if you have an empty reports widget, use the following steps to choose a report type in order to populate it.

1. On the left side of the interface, select either **Home** or **Projects**, depending on the dashboard where you've added the report widgets. If you selected Projects, you might also need to choose **Dashboard** at the top of the interface.
2. In the empty widget container, click ⚙ in the upper-right corner.



3. In the menu, expand **Project** (if necessary) to choose a project. Then expand **Report** and select a report type.



4. Click away from the dialog. The widget is now populated with data for that report type.

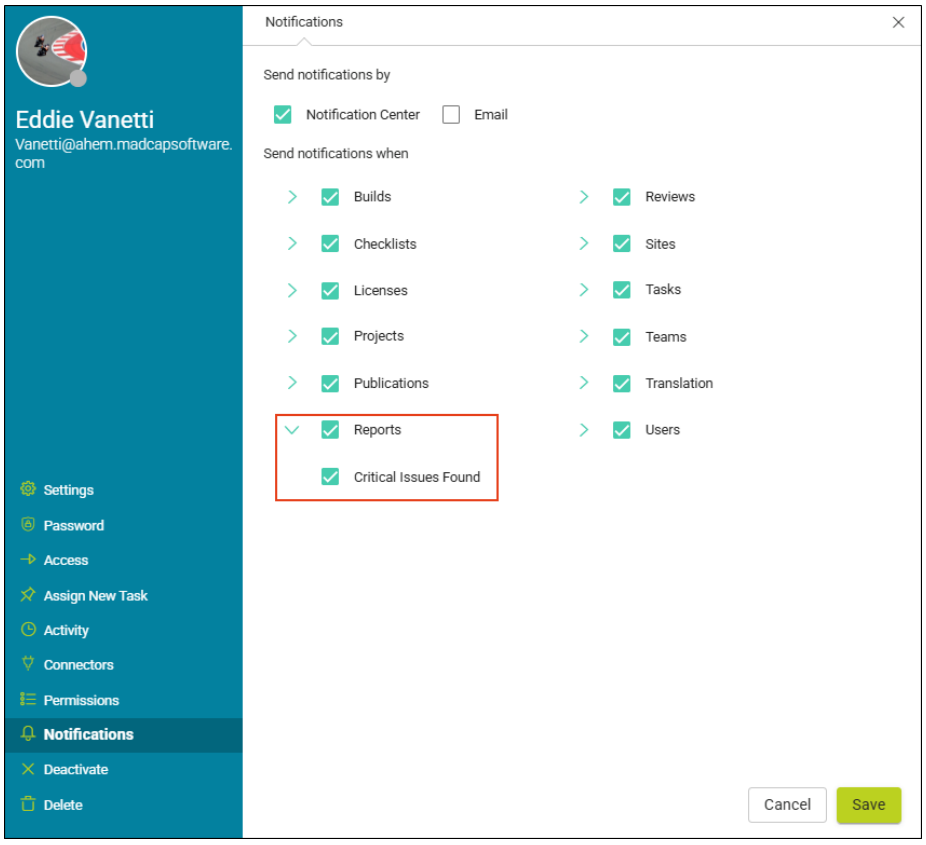
What's Noteworthy?

TIP If you click the number on a report widget, the Reports page automatically opens with that report selected.

CHAPTER 7

Setting Notifications for Reports

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.



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