madcap software

USER GUIDE

MADCAP FLARE ONLINE

What's New 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

Following are new features available in Flare Online.

For more information about each feature discussed in this manual, open the Help system and refer to the "What's New" topic. Links are provided in some feature descriptions, taking you to topics that contain additional information and steps.

- "Reviews Update" on page 7
  - From start to finish, you can now use Flare Online for the entire review process (i.e., there is no need to leave the browser to complete the review using Flare Desktop)
  - Authors can make decisions at the file level, including accepting, rejecting, or maintaining tracked changes, and merging package level files to complete the review
  - Resolve changes efficiently as a reviewer is editing in collaboration mode or after a reviewer submits a file, but before the normal workspace commit process
  - User interface updates to support clearer visibility into review progress and a more direct path from reviewer feedback to finalized content

- "Delete Folders and Commit Deletions" on page 27
  - Ability to delete multiple workspace folders
  - Deleted folders and files are added to the Workspace Overview pending a commit, so you can restore the files if you change your mind
  - Optionally set grid folder and file paths to display in a List or Tree view

- "Content Report Improvements" on page 33
  - New content reports are available in the Reports page (i.e., Misc reports and Unused reports)
  - Add new reports as widgets to your Home or Project Dashboard

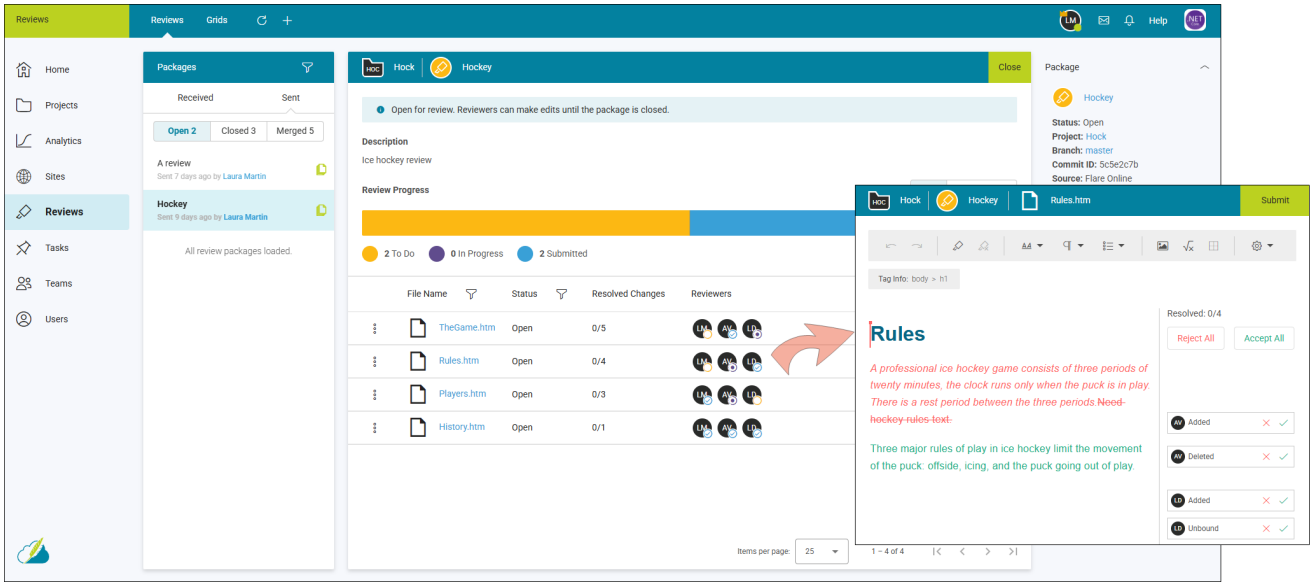
CHAPTER 2

Reviews Update

With this release, Flare Online now supports the entire review process without leaving the browser. Flare Desktop is not needed to close out a review package.

Owners (or authors) can create review packages and send them to reviewers. 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.

Using Flare Online for reviews lets teams efficiently incorporate reviewed changes into projects and finalize content faster.



Permission Required?

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



For more information about permissions, see the Help system.

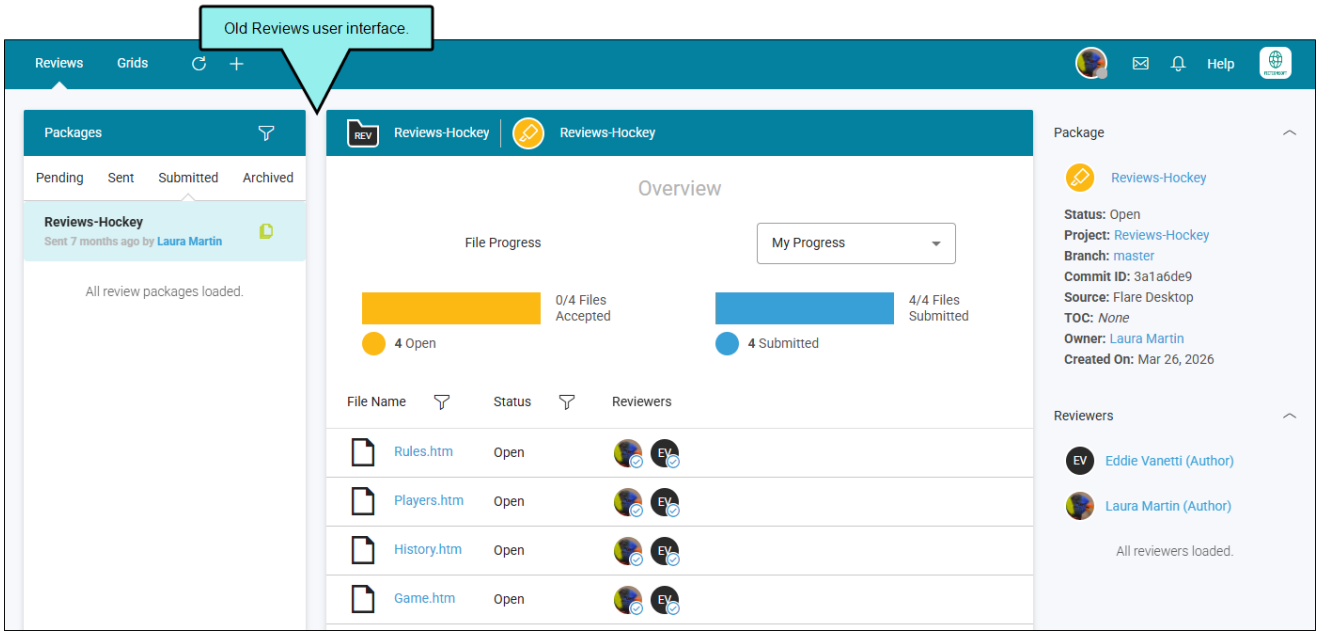
NOTE Reviews do not require permission to partake in them. The above permission is for managing and creating review packages. If you are the owner, you automatically have permission because you initiated it.

Old Reviews Process

Previously, the review process involved two Madcap products, Flare Online and Flare Desktop. Although review package's could be started in Flare Online, the review workflow needed to be closed out using Flare Desktop. In addition, when reviewers submitted edited files, the owner of the review had to open File Reviews in the desktop application to manage tracked changes, and close the file so edits could not longer occur in Flare Online.

The review process is much simpler now. To accommodate the revamped review process in Flare Online you might notice a slight redesign of the Reviews interface. The reviews pane experience, package and file states, terminology aligned for clearer review, completion, and post-review actions.

As a reminder, this is a snapshot of the Reviews main page in previous releases:



NOTE Previously, when the left pane (i.e., Review Explorer) showed package files, color bars displayed next them to indicate status. The bars no longer exist. Instead, a blue checkmark icon displays if all the reviewers have submitted all the files associated with the package.

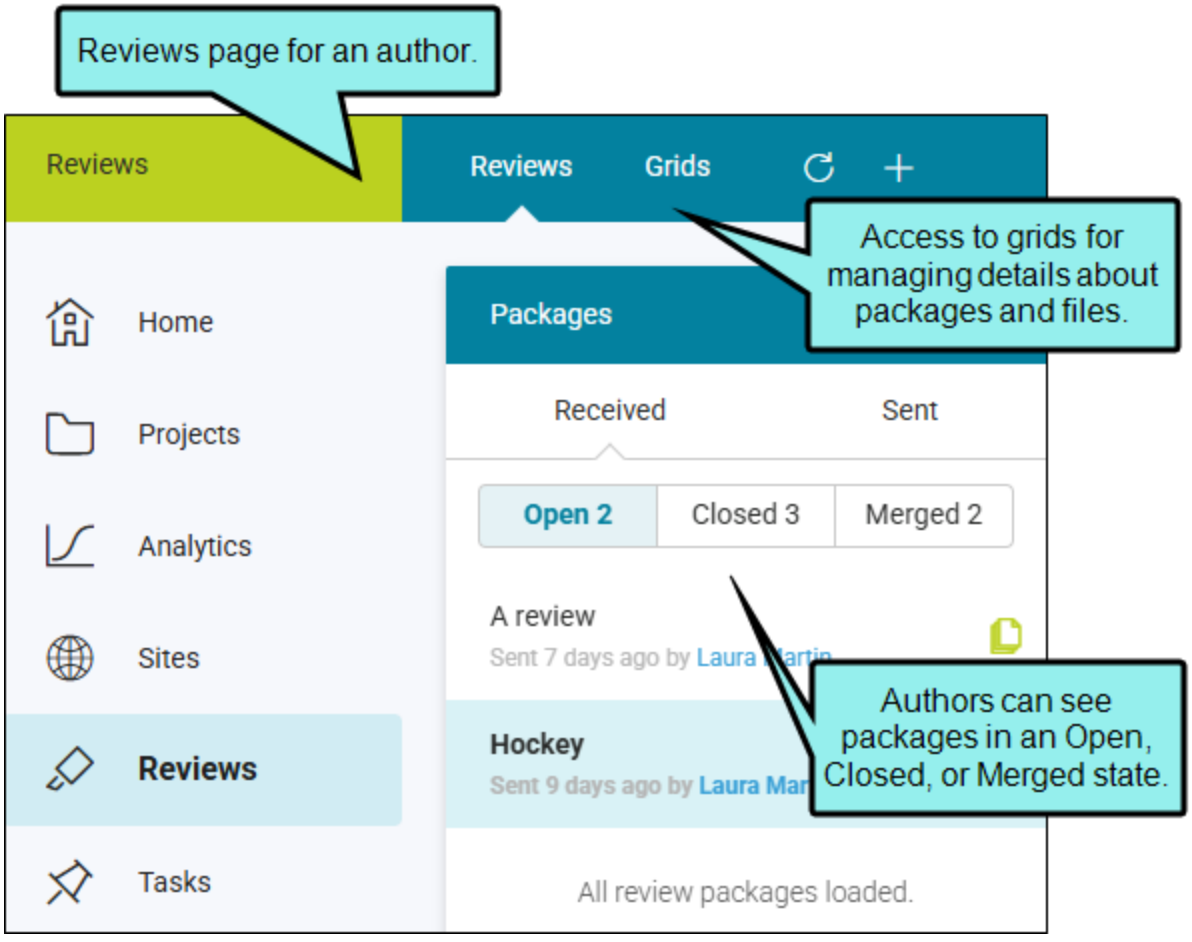
Review Explorer Updates

When you first open Reviews, any packages that involve you display in the Review Explorer. What you see and interact with on the Reviews main page depends on your user type.

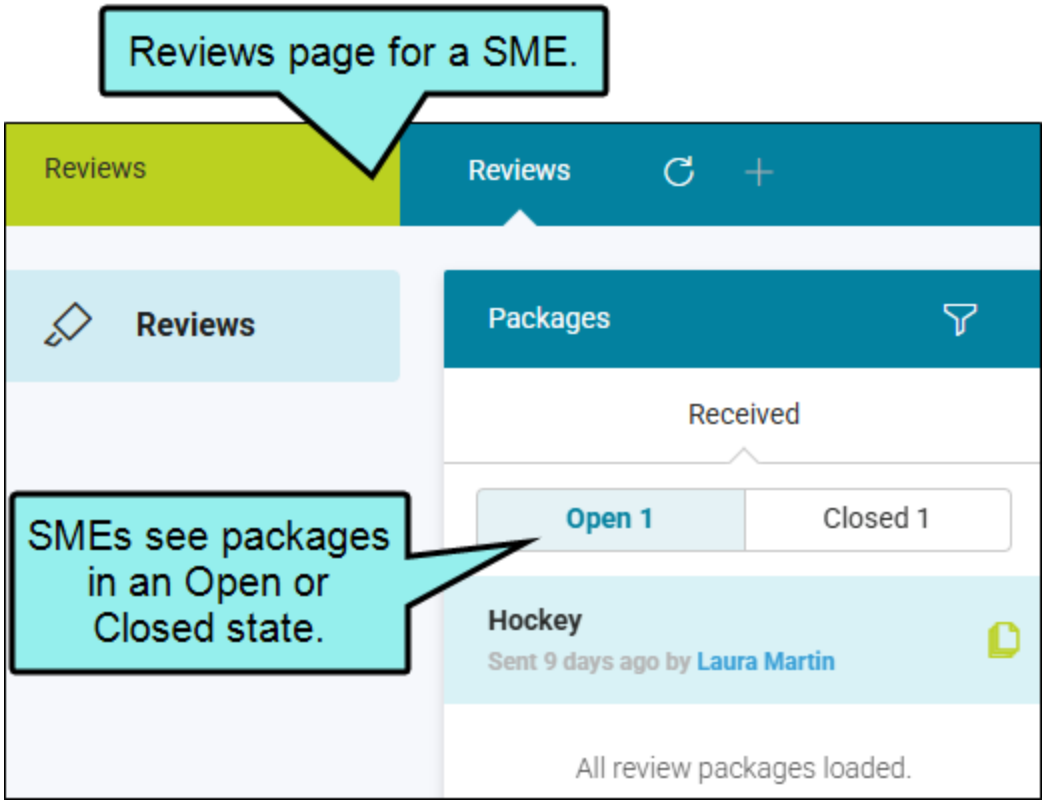
An author can see review packages in the Received or Sent panes. Meaning, if you are the owner of a package it lists in the Sent pane, and if you are a reviewer (or the owner is also a reviewer), the package lists in the Received page.

- Received This pane displays packages that the reviewer needs to review.
- Sent This pane displays packages that the owner has sent to others for review.

Using the tabs beneath the Received and Sent panes, authors can look at open, closed, and merged packages, and view the corresponding review package overview. In addition to the Reviews grid, authors have access to package and file grids, and can create, close, merge, and delete packages in Flare Online.



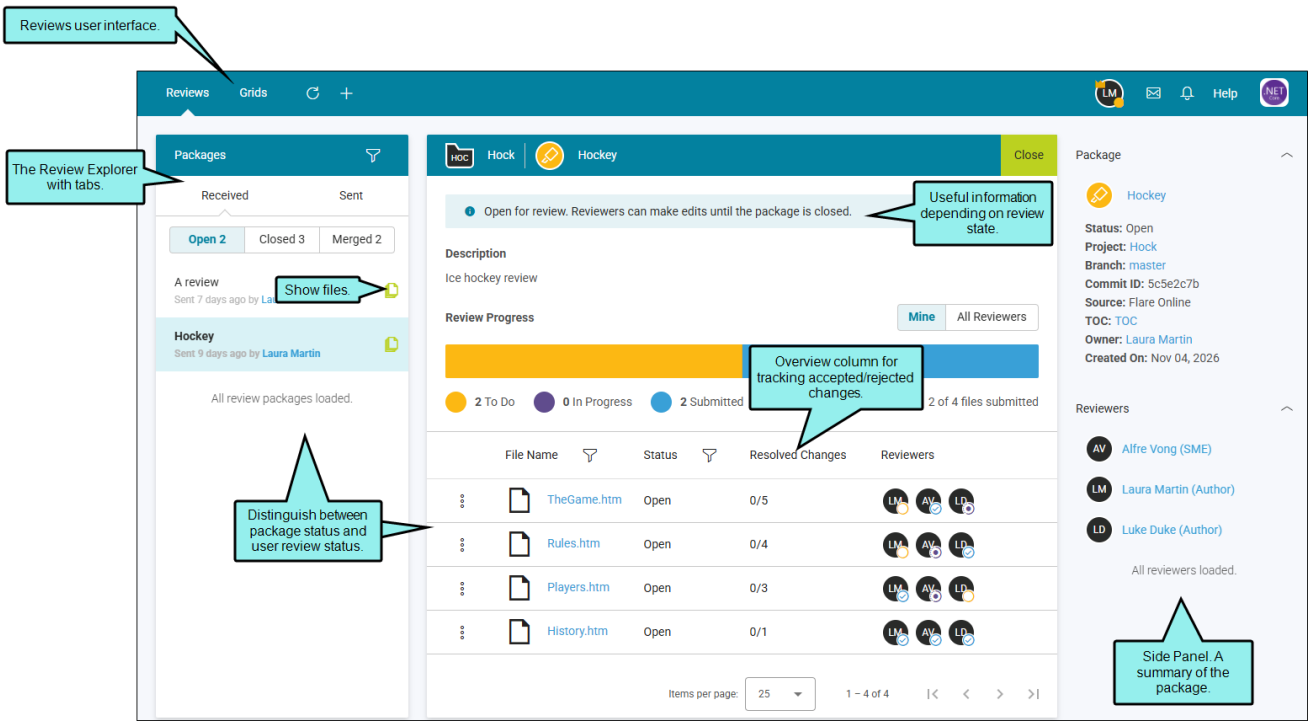
Conversely, a subject matter expert (SME) can see review packages to take action on in the Received pane. A SME can also use tabs to look at open or closed review packages (and associated files), and view the corresponding review package overview.



- **Open** Reviewers can make edits.
- **Closed** Stops reviewers from editing.
- **Merged** Sends changes to the workspace.

If you click the review package, an overview page displays to the right with a chart, files, status, tracked changes, and reviewers as they relate to a single package.

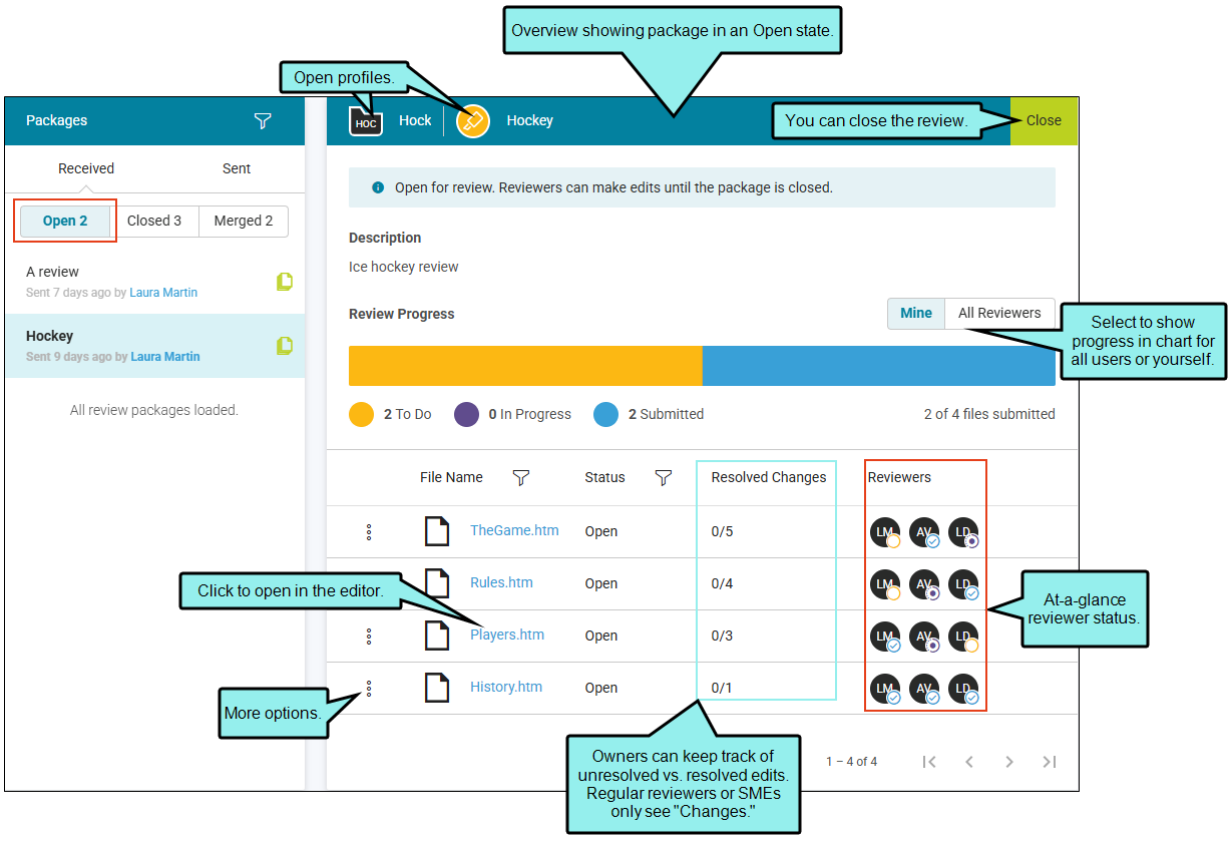
If you click **Show files**, the Review Explorer changes, allowing you to toggle views between Files and Table of Contents (TOC). (If an owner chooses not to associate files with a TOC, then a TOC will not be applicable to your review package.) If you click a file, it displays in the Review Editor to the right.

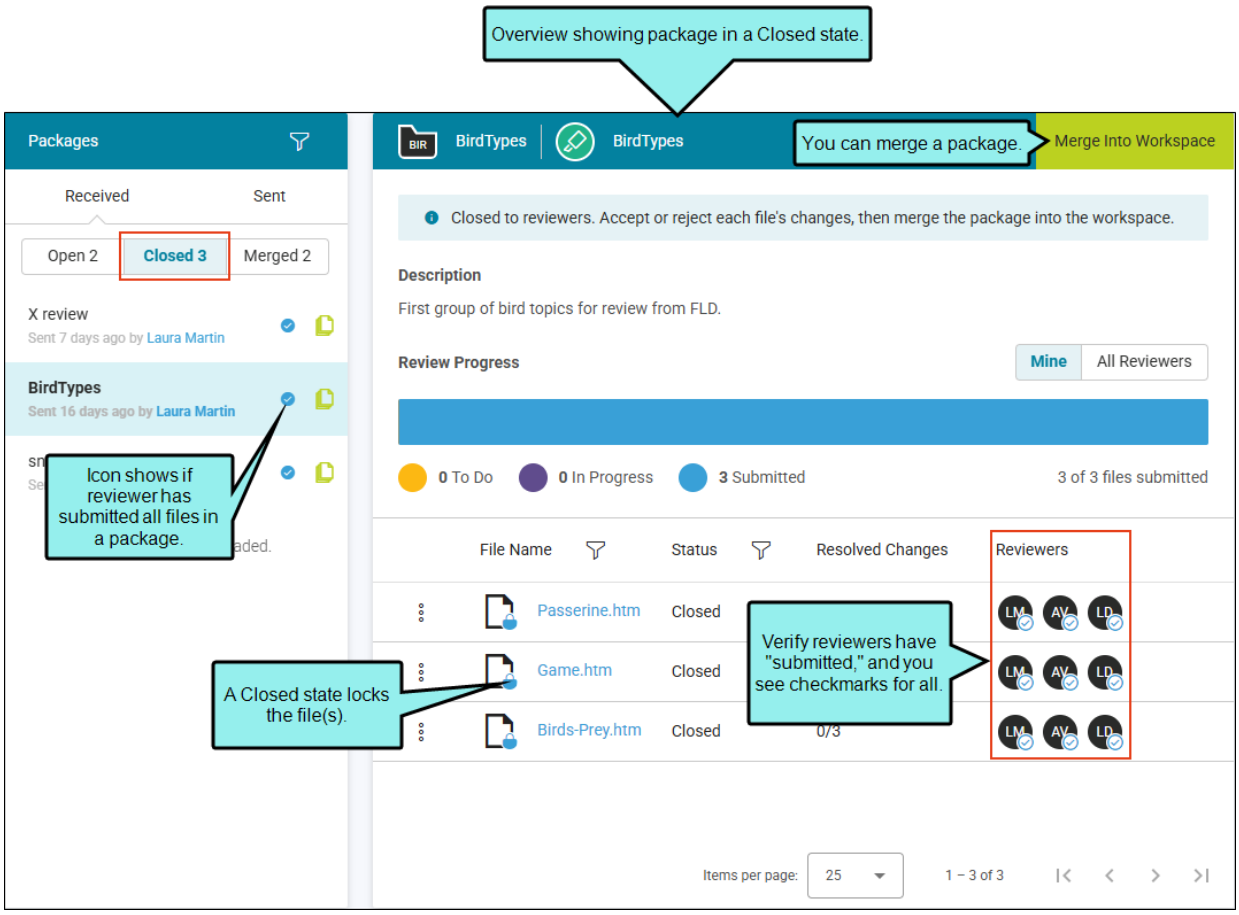


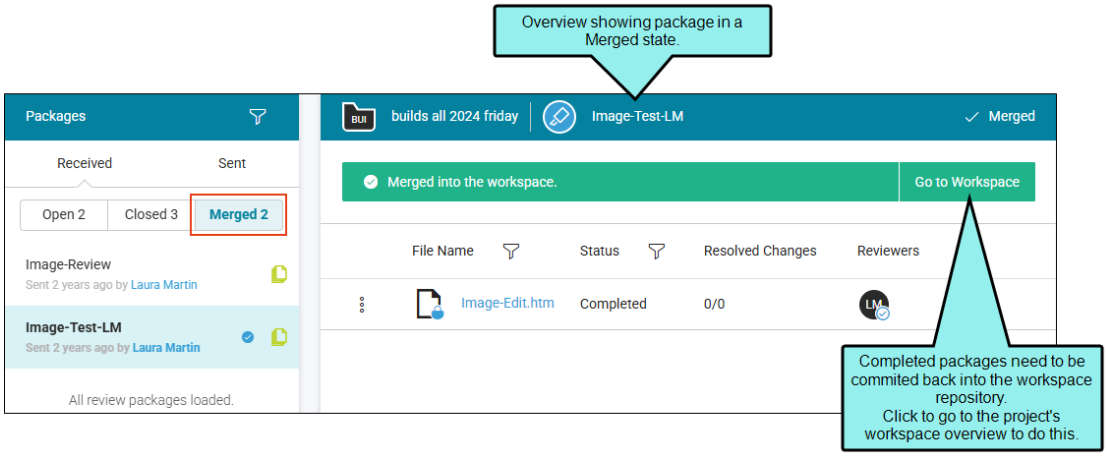
Review Packages Overview Updates

When you select a review package, you can see details in its overview. You have the ability to update aspects of the review packages, such as open review file(s), set status, and monitor changes as well as reviewers. This offers valuable momentum to the review process.

1. On the left side of the interface, click **Reviews**.
2. From the Review Explorer, select a package. Keep in mind that you can select a package from the different package states available to you in the Review Explorer (i.e., Open, Closed, Merged). Each state displays different information. The overview opens to the right.



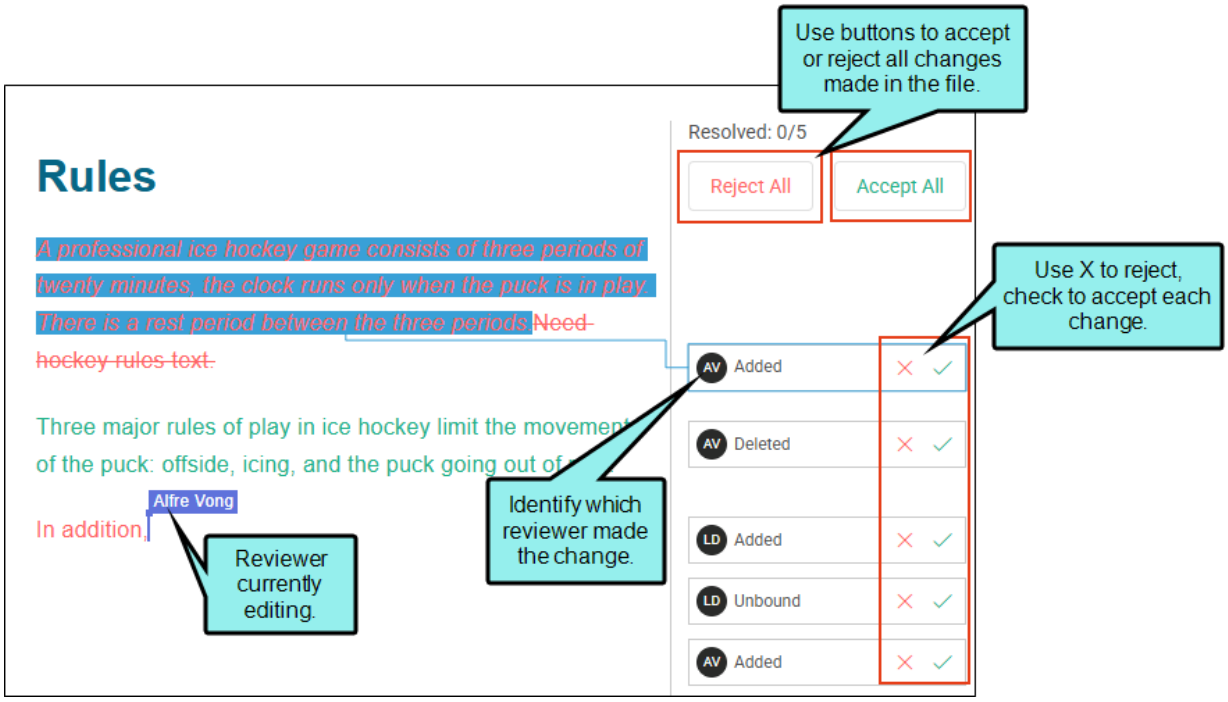

Overview showing package in a Closed state.
Packages
Received
Sent
Open 2
Closed 3
Merged 2
X review
Sent 7 days ago by Laura Martin
BirdTypes
Sent 16 days ago by Laura Martin
Icon shows if reviewer has submitted all files in a package.
BirdTypes
BirdTypes
You can merge a package.
Merge Into Workspace
Closed to reviewers. Accept or reject each file's changes, then merge the package into the workspace.
Description
First group of bird topics for review from FLD.
Review Progress
Mine
All Reviewers
0 To Do
0 In Progress
3 Submitted
3 of 3 files submitted
File Name
Status
Resolved Changes
Reviewers
Passerine.htm
Closed
Game.htm
Closed
Birds-Prey.htm
Closed
0/3
A Closed state locks the file(s).
Verify reviewers have "submitted," and you see checkmarks for all.
Items per page:
25
1 – 3 of 3


Overview showing package in a Merged state.
Packages
Received
Sent
Open 2
Closed 3
Merged 2
Image-Review
Sent 2 years ago by Laura Martin
Image-Test-LM
Sent 2 years ago by Laura Martin
All review packages loaded.
builds all 2024 friday
Image-Test-LM
Merged
Merged into the workspace.
Go to Workspace
File Name
Status
Resolved Changes
Reviewers
Image-Edit.htm
Completed
0/0
Completed packages need to be commited back into the workspace repository.
Click to go to the project's workspace overview to do this.

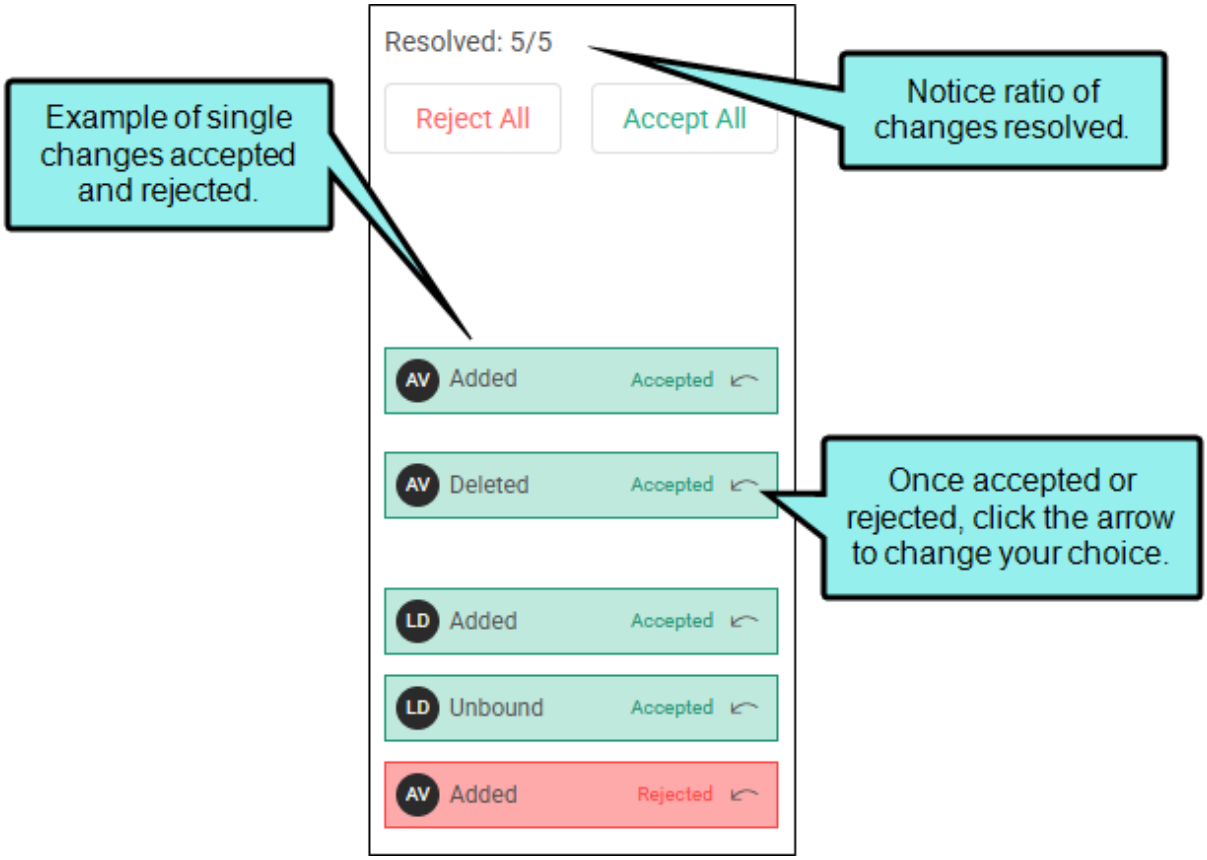
Tracking Review Edits

Owners can efficiently accept or reject changes in a file, one at a time or all at once. This editing can happen during a review (before the reviewers submit files), or after reviewed files are individually submitted from reviewers. If an edit is accepted or rejected, then all reviewers who have the file open can see the update from the owner collaboratively in real-time. Flare Online lets owners accept and reject changes through the entire review process until a package is merged into the workspace.

1. From the Review Explorer **Open** tab, select a package and click  to show the files. (Alternatively, you can see package file(s) in the Review Packages Overview to the right. As an owner reviewing work, you can use the overview to determine how far along reviewers are in editing a file and the number of changes.)
2. Select a file from the package to review. It opens in the Review Editor.
3. On the right-side of the editor, view pending changes. In the editor you can see if anyone is currently editing the file, and who made specific changes.



Click to **Reject All**, **Accept All**, or select the noted changes individually (X to reject it, check to accept it).



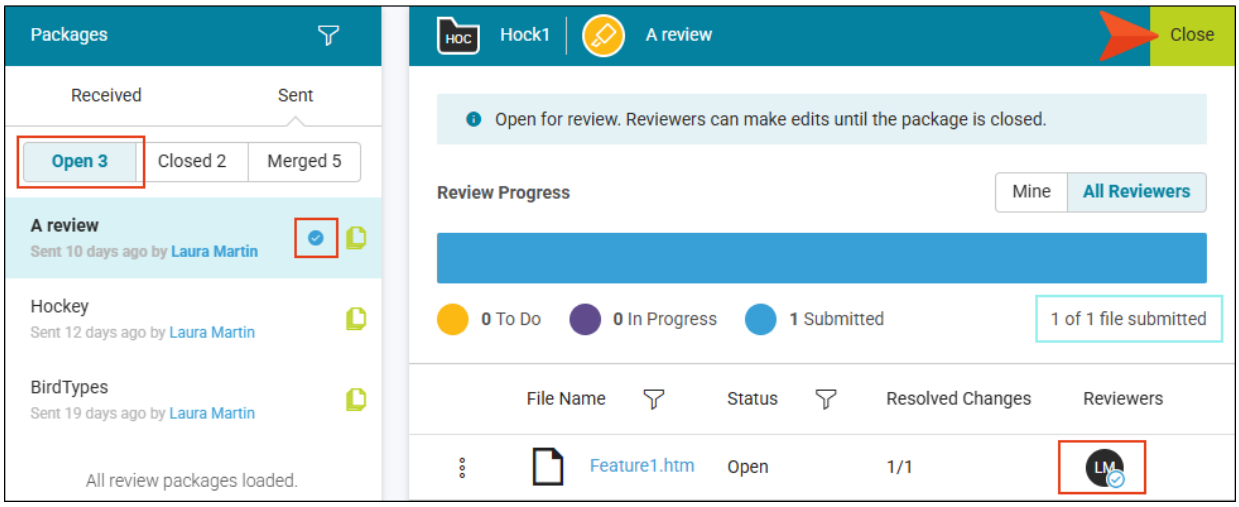
NOTE Owners are not required to accept or reject every change, or even look at edits, before "closing" the file. Since the review process uses a collaborative editor like the regular workspace, all edits are retained in the file.

4. When the editing is complete, from the upper-right corner of the editor, click **Submit**. While in an Open state, files can be reopened for more edits, but the reviewer must select **Submit** again when done. A file remains Open until the owner puts it in a Closed state.

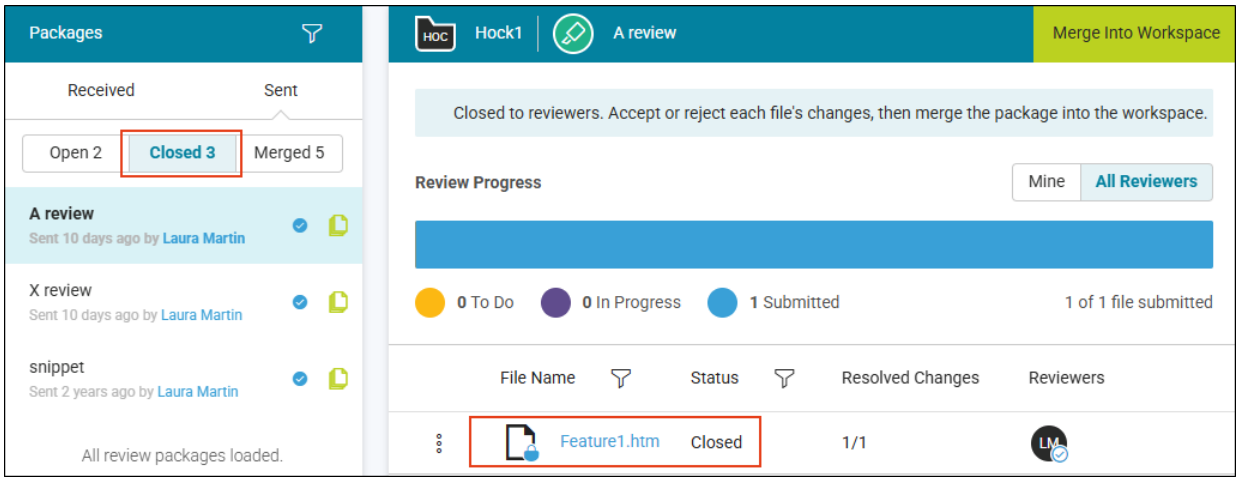
Closing a Review Package

When all the edits are done, and changes are accepted or rejected in the editor in Flare Online, owners can close the review package.

1. From the Review Explorer **Open** tab, select a package.
2. From the Review Packages Overview, click **Close**.



This closes all the files in a review package and puts an editing "lock" on them so no further editing can occur.



NOTE If you close a package by mistake, you can undo the action. From the overview three-dot menu, click **Set Status**. From the profile drop-down, select **Open** and **Save** the setting. (If you select the **Reset reviewer statuses to To Do** check box, this resets the status for all reviewers for that particular file.)

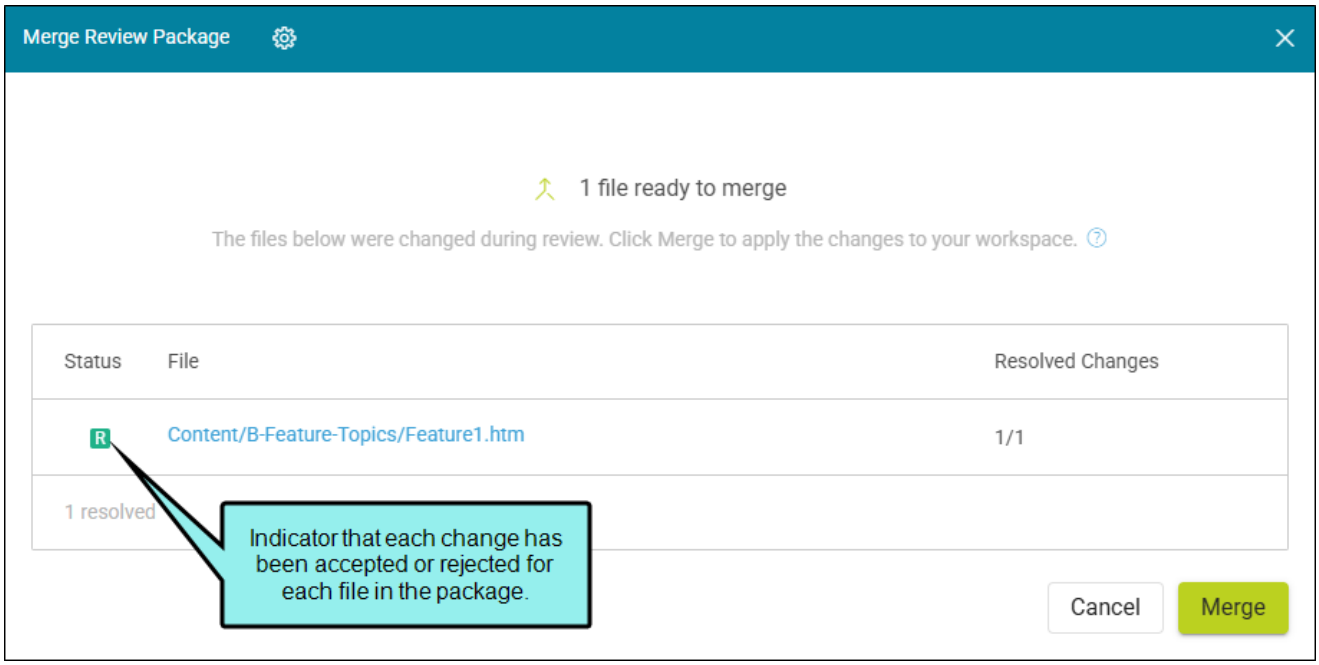
Merging Into Workspace

After the review is finished and closed for editing, the review package needs to be merged into the workspace.

1. From the Review Explorer **Closed** tab, select a package
2. From the upper-right corner of the Review Packages Overview, select **Merge into Workspace**. The Merge Review Package dialog opens.
3. Click **Merge**.

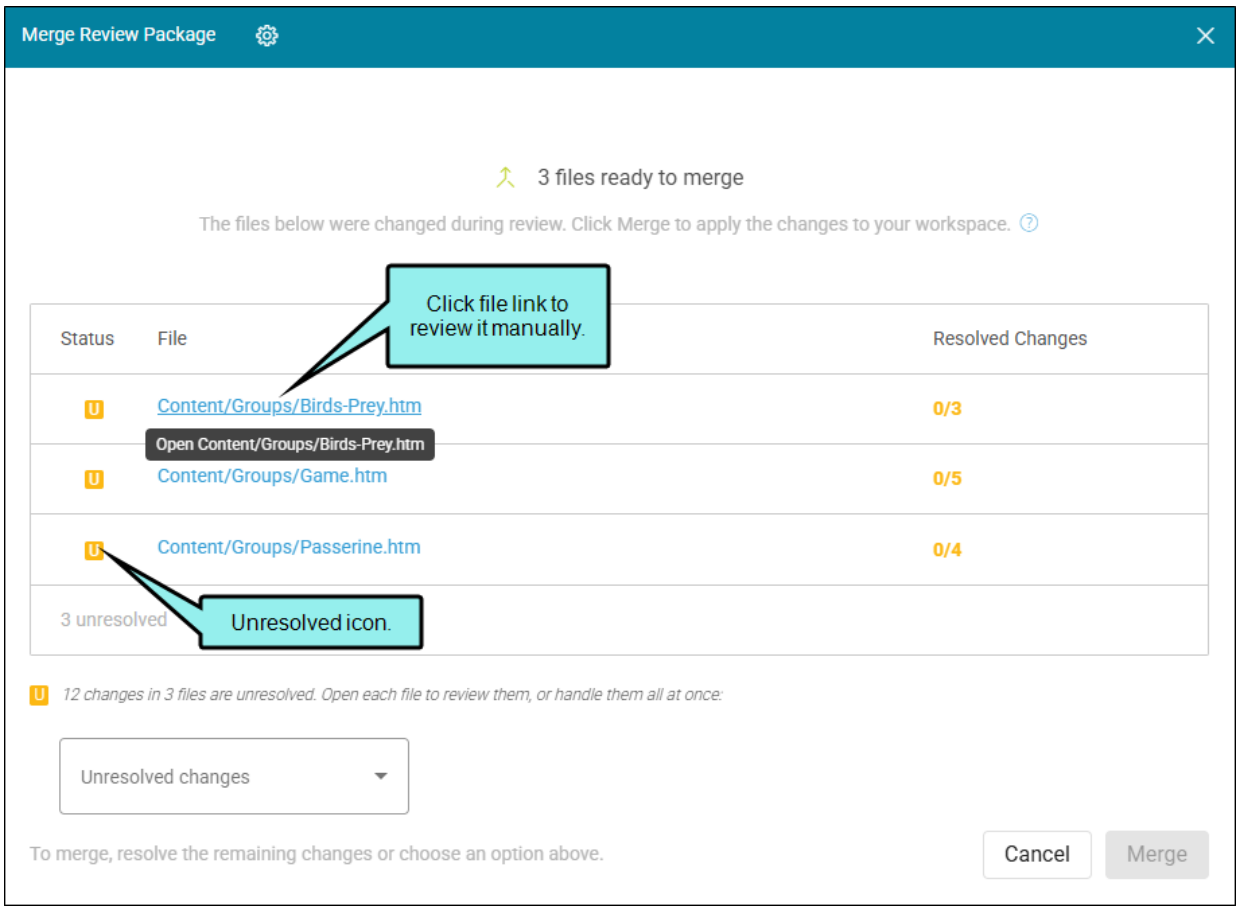
How to Handle Unresolved Changes

The Merge Review Package dialog alerts you to any unresolved changes. If each file in the package has been accepted or rejected successfully, the dialog indicates that with a small green "resolved" icon.

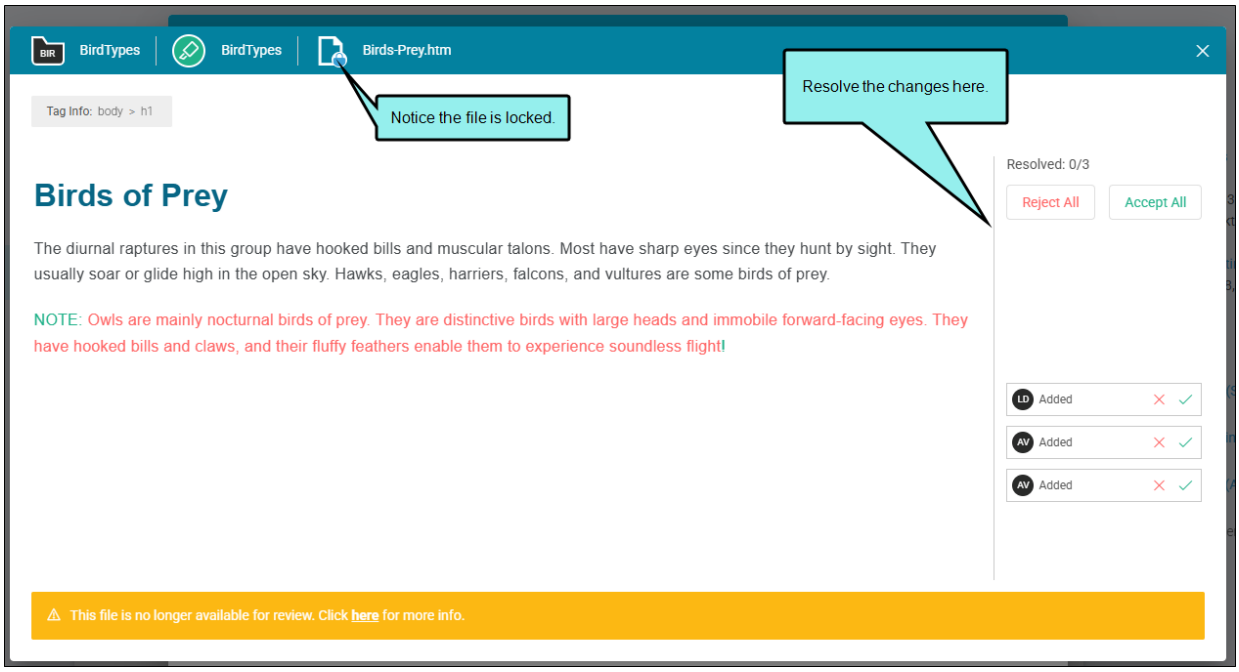


If the merge detects unresolved changes, the dialog indicates that with a yellow "unresolved" icon. You can do the following:

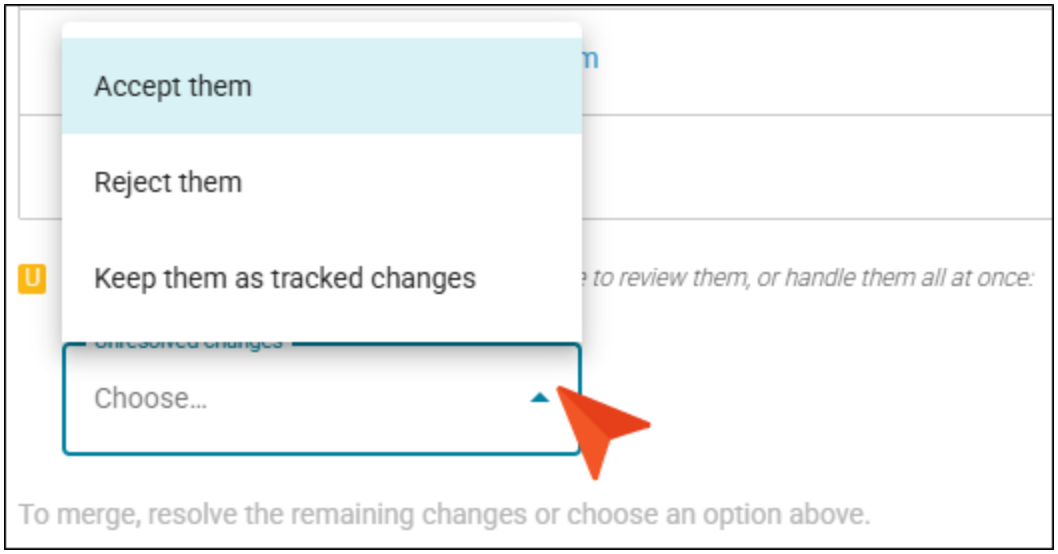
- From the merge dialog, click each file individually to open it manually to resolve the changes (without closing the merge dialog)



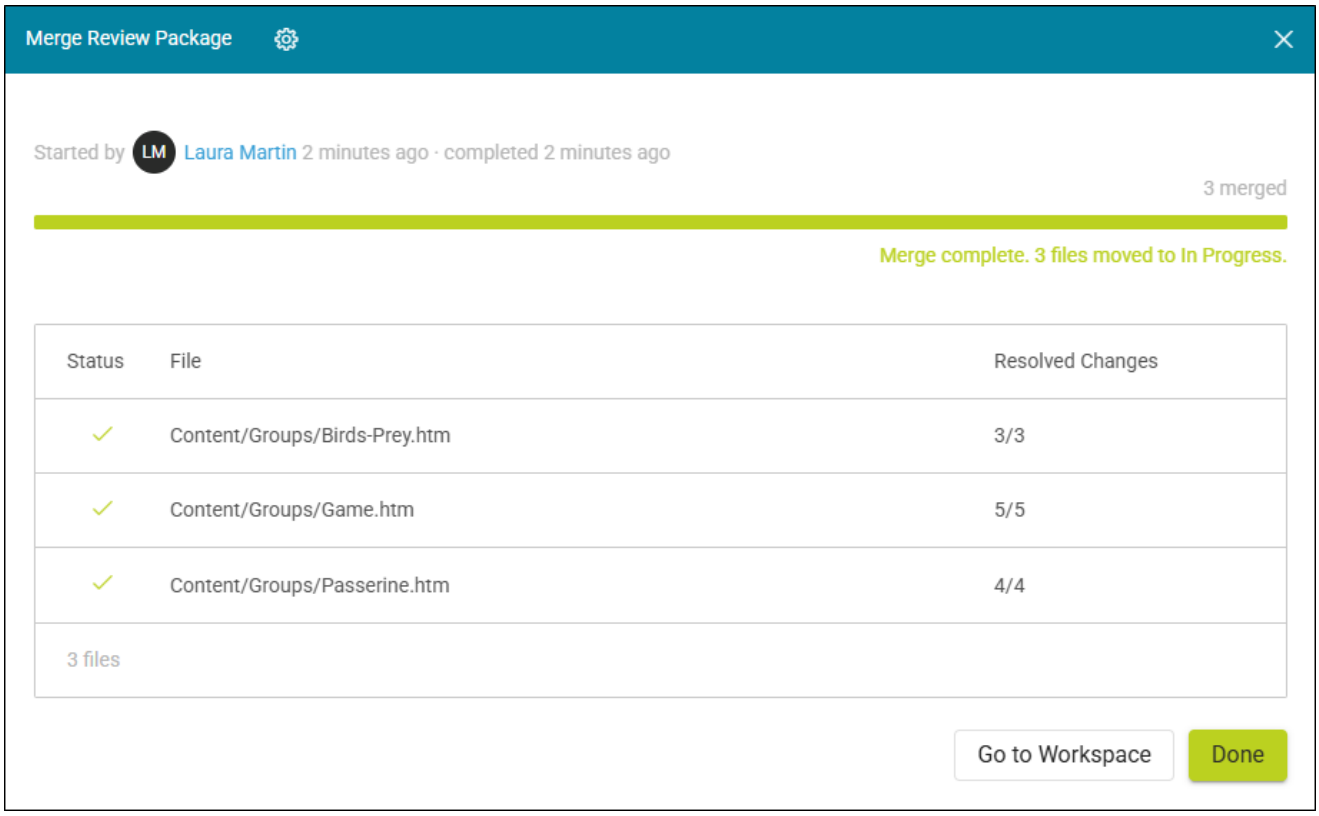
The file opens in an editor strictly for addressing the unresolved changes. Select to accept or reject the changes and close the pop-up editor.



- From the merge dialog, click the drop-down to select a choice for how to handle all the unresolved changes at once (i.e., Accept them, Reject them, Keep them as tracked changes).

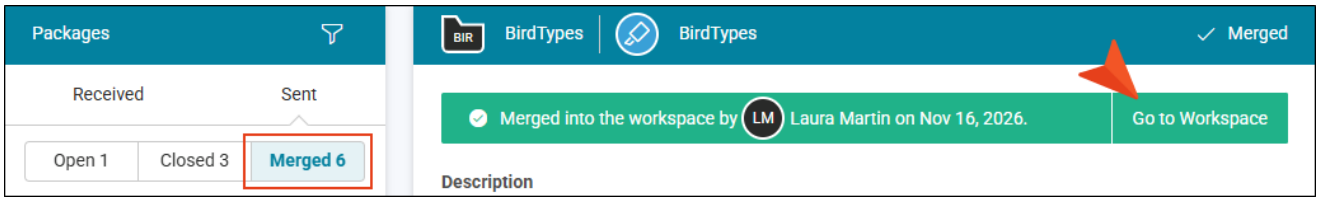


Click **Merge**. You will see the merge process and in the end a merge completed.



Click **Done**. The package moves to the **Merged** tab, and a banner displays telling you to go to the workspace. The package is sent to the workspace in collaborative editing mode (i.e., the merge function keeps the files in an uncommitted state)

You need to go to the regular workspace overview and commit the package file(s) back into the repository.



Review Workflow Using Flare Online

The following is the basic workflow to follow from start to finish when performing the review process in Flare Online.

1. Owner Open the Users page and invite the reviewer(s) to Flare Online.
2. Reviewer Click the link in the email to accept the invitation and set a password.
3. Owner Open the Reviews page, and click  to create a new package. The wizard is where the owner selects files for review, a TOC, and reviewers. Reviewers of different seat types (e.g., authors, SMEs) can be chosen, and anyone selected is automatically associated with the project, and is an assigned reviewer for all the files chosen.
4. Reviewer Open the Reviews page. From the Reviews > Packages tab, all reviewers can see assigned packages in the Received pane.

   Click to expand the Open tab (if necessary), and select a package received. The Review Packages Overview displays each file associated with the received package.

   Click each file to edit or annotate it using the Review Editor.
5. Owner During a review (before the reviewers submit files when done editing), owners can open the file and accept or reject changes to the content on-the-fly. If an edit is accepted or rejected, then all reviewers who have the file open can see the update from the owner.

   On the right-side of the editor, view pending changes and select Reject All, Accept All, or select the noted changes individually (X to reject it, check to accept it).
6. Reviewer When done making edits, click Submit. Use the overview to track submitted files.

   The reviewer is done submitting once all the files in the queue are complete. Notice the submitted icon next the package and the files remain in an Open state until the owner closes them. While in an Open state, files can be reopened for more edits, but the reviewer must select Submit again when done.
7. Owner After reviewed files are individually submitted from reviewers, owners must accept or reject changes (if not done already), and start to complete the review (i.e., close and merge the review package).

   In each file on the right-side of the editor, view any pending changes. Be sure to account for all the changes by either accepting or rejecting the edits.
8. Owner From the upper-right corner of the overview, click Close. This closes all the files in a review package, puts an editing "lock" on them, and moves the package to Closed.

(Alternatively, from the Review Package profile, select **Settings > Status > Closed**. This closes all files in the package. Or, from the Review Package Overview, click the vertical 3-dot menu and select **Closed**. This closes a single file in the package.)

> NOTE To close and merge packages, be aware that if you are the owner of a review only, use the Sent pane. But if you are the owner and are also a reviewer, you can use the Sent pane or the Received pane.

> NOTE If a reviewer clicks a closed review package file, it opens in the editor as read-only. A banner warning displays at the bottom of the editor indicating that the file is no longer available for review.

> NOTE Any authors working in that project can close the review file. This is necessary in case the owner (i.e., original author) is not available to close it.

9. **Owner** After the review is finished and closed for editing, the review package needs to be merged into the workspace. From the Closed tab, select the review package. From the upper-right corner of the overview, click **Merge Into Workspace**.

   At this point, the owner is alerted to any unresolved changes, a merge point is created in the revision history, and the files will be in editing mode (meaning the files are not committed back into the repository with the merge action).

10. **Owner** The review files are merged into the workspace, but they still need to be committed back into the project's repository.

    a. From the top of the overview, click **Workspace Overview** from the text "Go to the project's Workspace Overview to commit the merged files to the repository." This opens the overview to the uncommitted files.

    b. In the Workspace Overview, select the file(s) in the list.

    c. Click **Commit** in the upper-right corner.

    d. In the Create New Commit dialog, enter a **Commit Message** and click **Commit**. Alternatively, you can click **Cancel**.

Review Package Profile

A Review Package profile is included for a package. It shows different pages for the overview, files, reviewers, activity, and settings. You can edit the name, description, and the TOC for the package. Most importantly, you can change who the owner is and the status of the package.

The benefit is that owners have the ability to accept and reject changes throughout the entire review process until the package is merged into the workspace.

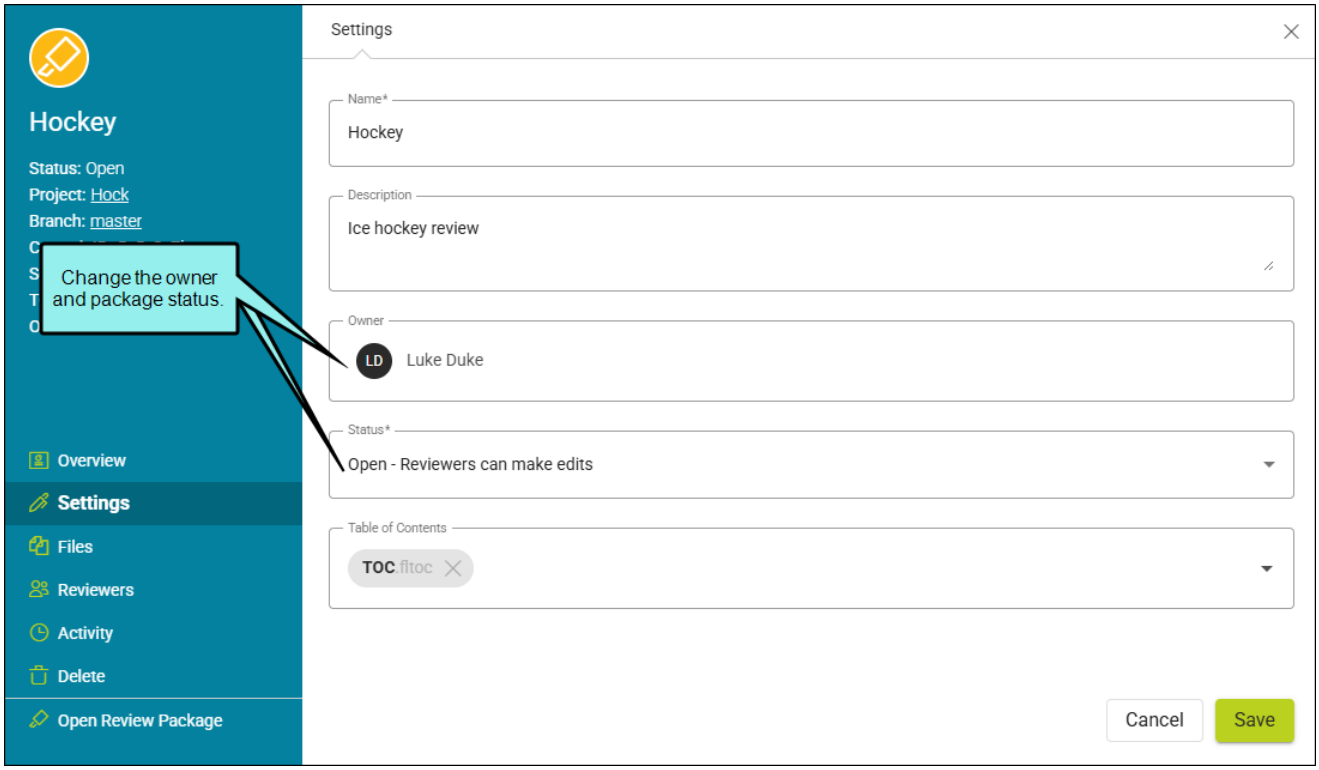
From the Status drop-down, select on of the following:

- Open If you have a closed package, you can reopen it. When you reopen, a check box displays Reset reviewer statuses to To Do. If you check this box, any work "submitted" will be reverted to the To Do status for all reviewers. The package is moved back to the Open tab, the file lock is removed, and reviewers will need to review the file again and resubmit. Any previous tracked changes are maintained. If you do not check this option, the package opens but each file would stay closed and locked (i.e., each file in the package would have to be opened individually).

  If a merged package is set to Open, it moves to the Open tab for review but the status displays as completed. If you want reviewers to edit the files, you need to separately set those files to an Open status.

- Closed Set an Open or Merged package to Closed. If a package is merged again, you need to recommit its files into the regular workspace.

- Merged When clicking to merge, the merge dialog opens up from the profile to manage merging the review files.



NOTE The Review Package profile is not to be confused with the review file profile Set Status option available from the Review Package Overview vertical three-dot menu (next to the file). This setting changes the review file status as Open, Closed, or Completed.

CHAPTER 3

Delete Folders and Commit Deletions

Previously, it was possible to delete content files only. Starting with this release, you can also delete folders. You might find this necessary to remove outdated folders that are no longer part of your document structure, or to delete temporary folders created during imports or migrations. In addition, when deleting folders or files, the commit is no longer done on the spot, but rather these deletions are set to a pending status and added to the next commit, which you can complete on the Workspace Overview page.

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:

- ☑ Create/Edit Files

  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.

- ☑ Edit Code

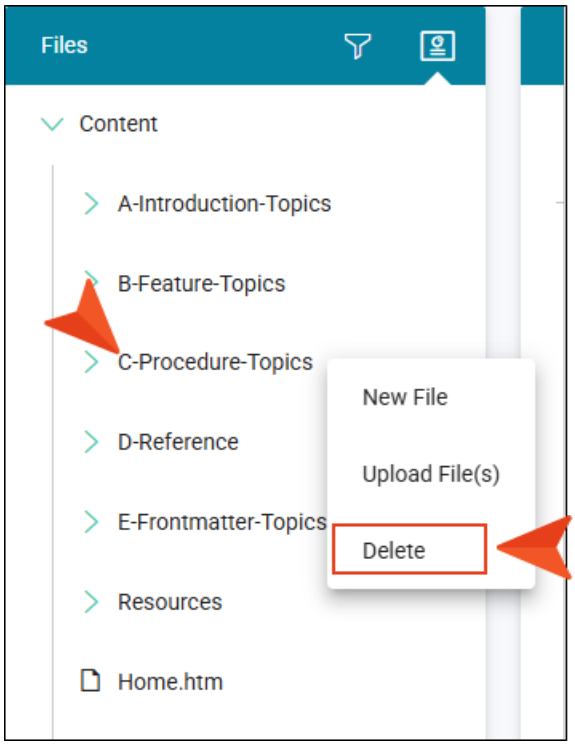
  If this is deselected, the XHTML in the Code view is read-only.

  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 Delete a Folder or File

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.

CHAPTER 4

Content Report Improvements

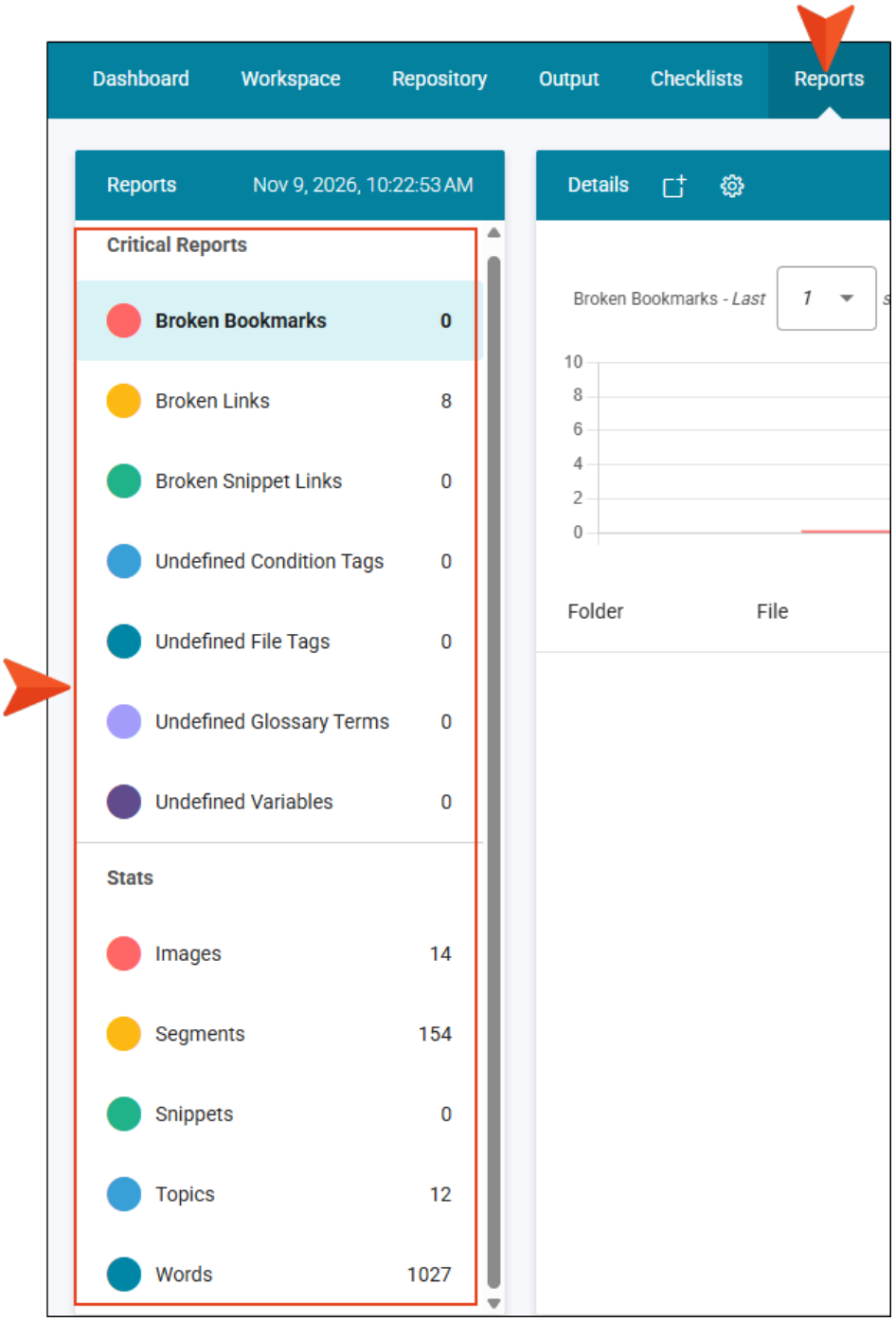
The Reports page for projects is more robust, with several new content reports available.

Permission Required?

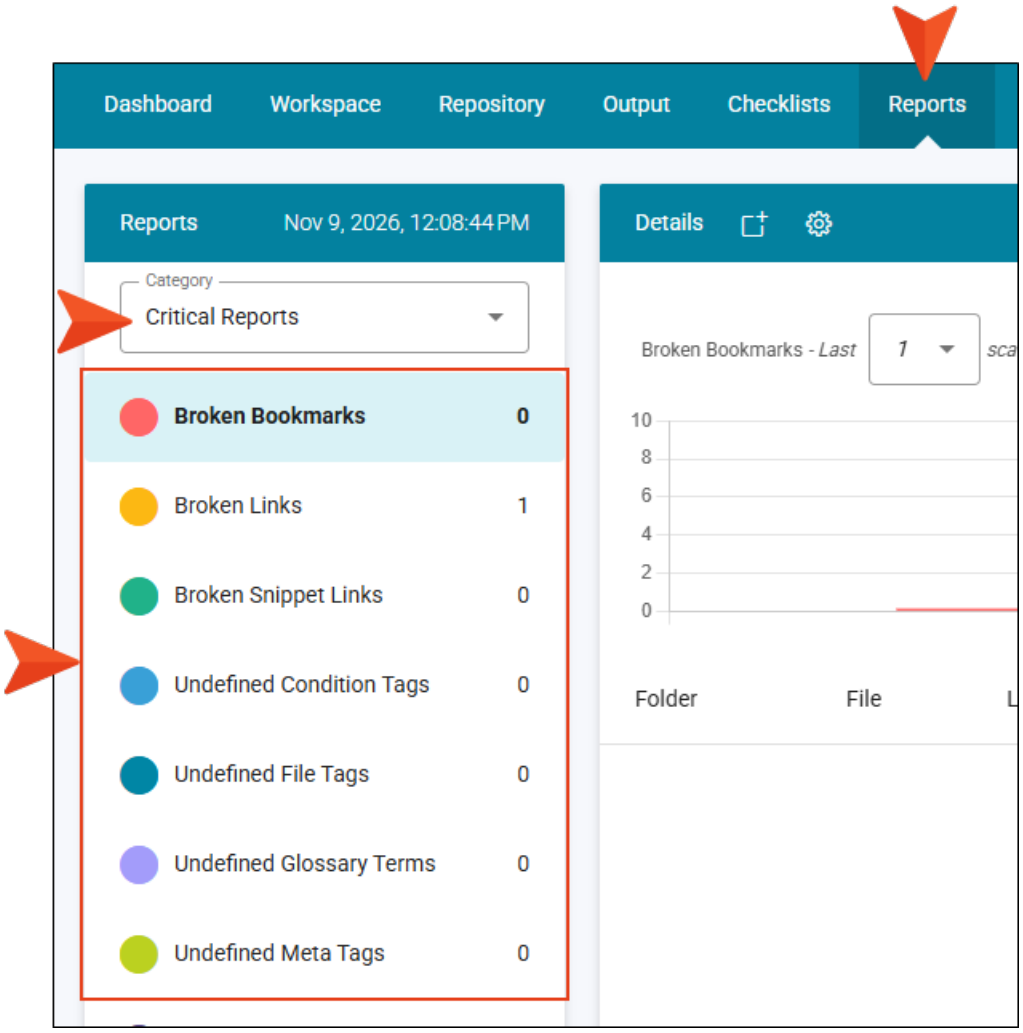
No special permission is required for this activity. All authors who are associated with the project are allowed.

Enhancements

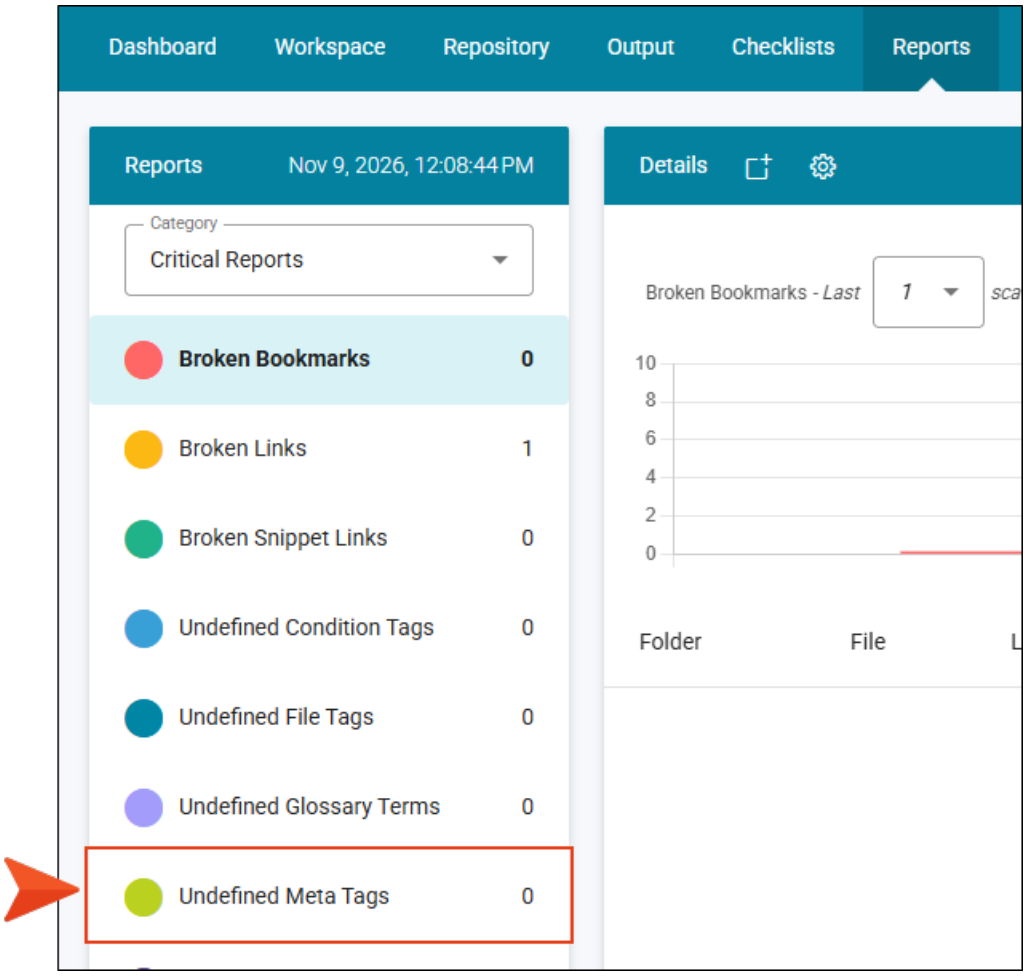
Previously, the Reports page contained seven Critical reports and six Stats reports.



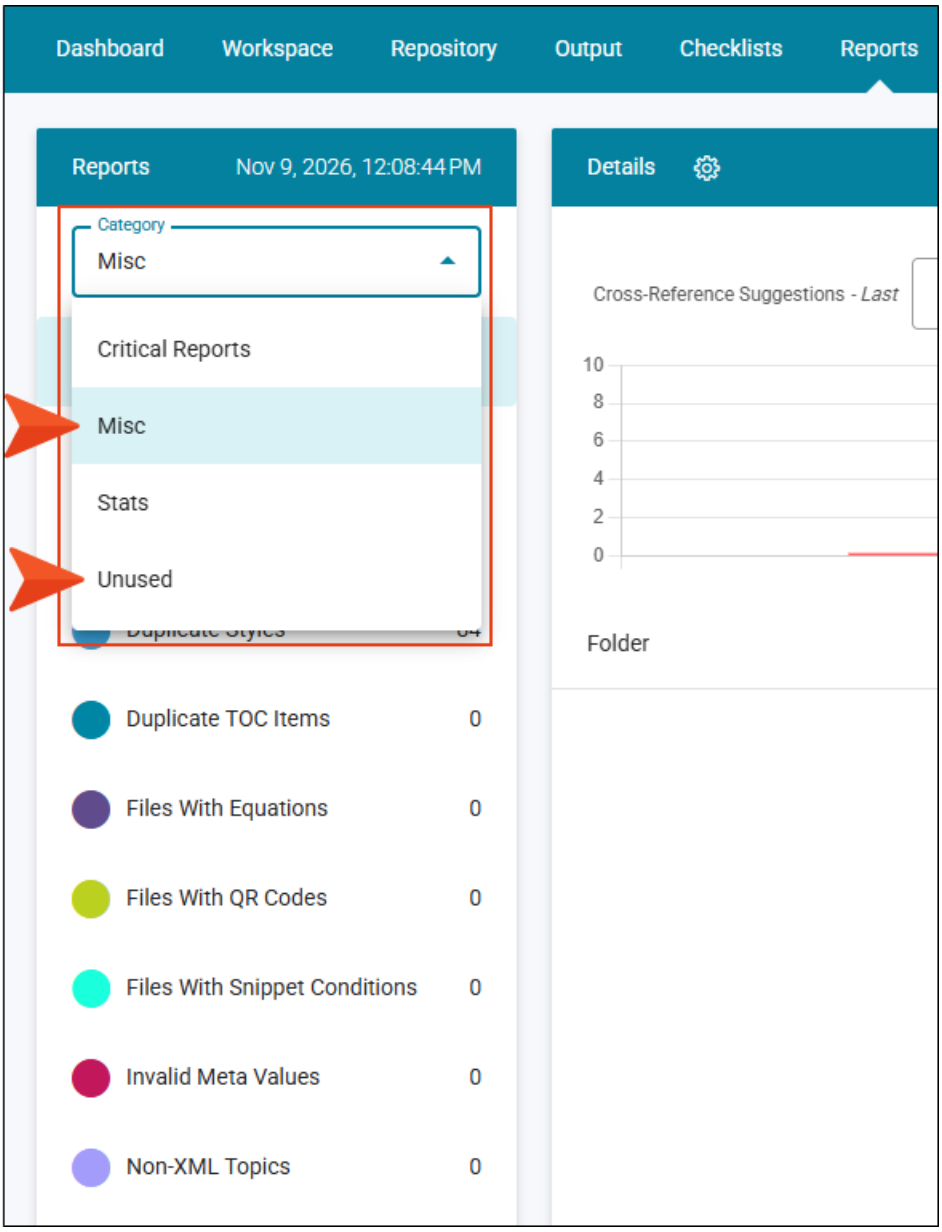
With this release, a new drop-down has been added to the area on the left side of the page listing reports. By default, the critical reports are shown initially. This category simply means that these are reports containing information that is particularly important to deal with (e.g., broken links, undefined elements) so that your project output works correctly.



In addition to the previous reports, there is a new Critical report for Undefined Meta Tags.



Along with Critical reports and Stats, you can also see several Misc reports and Unused reports.



Report Descriptions

Following are lists and explanations of all the reports now available in Flare Online, both old and new.

> 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

- 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

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

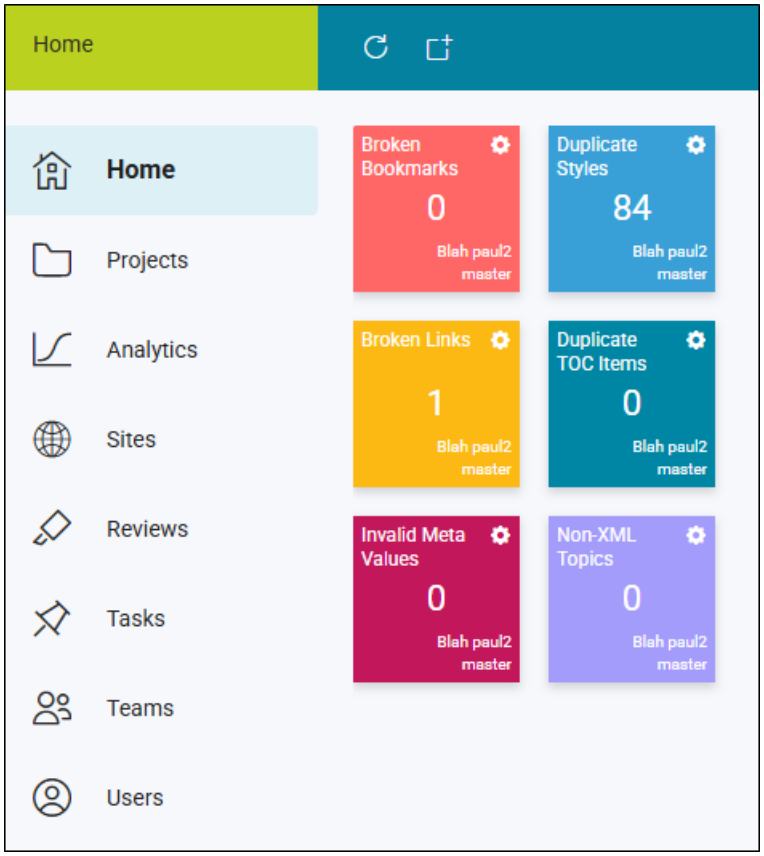
- Images
- Segments (i.e., phrases or sentences)
- Snippets
- Topics
- Words

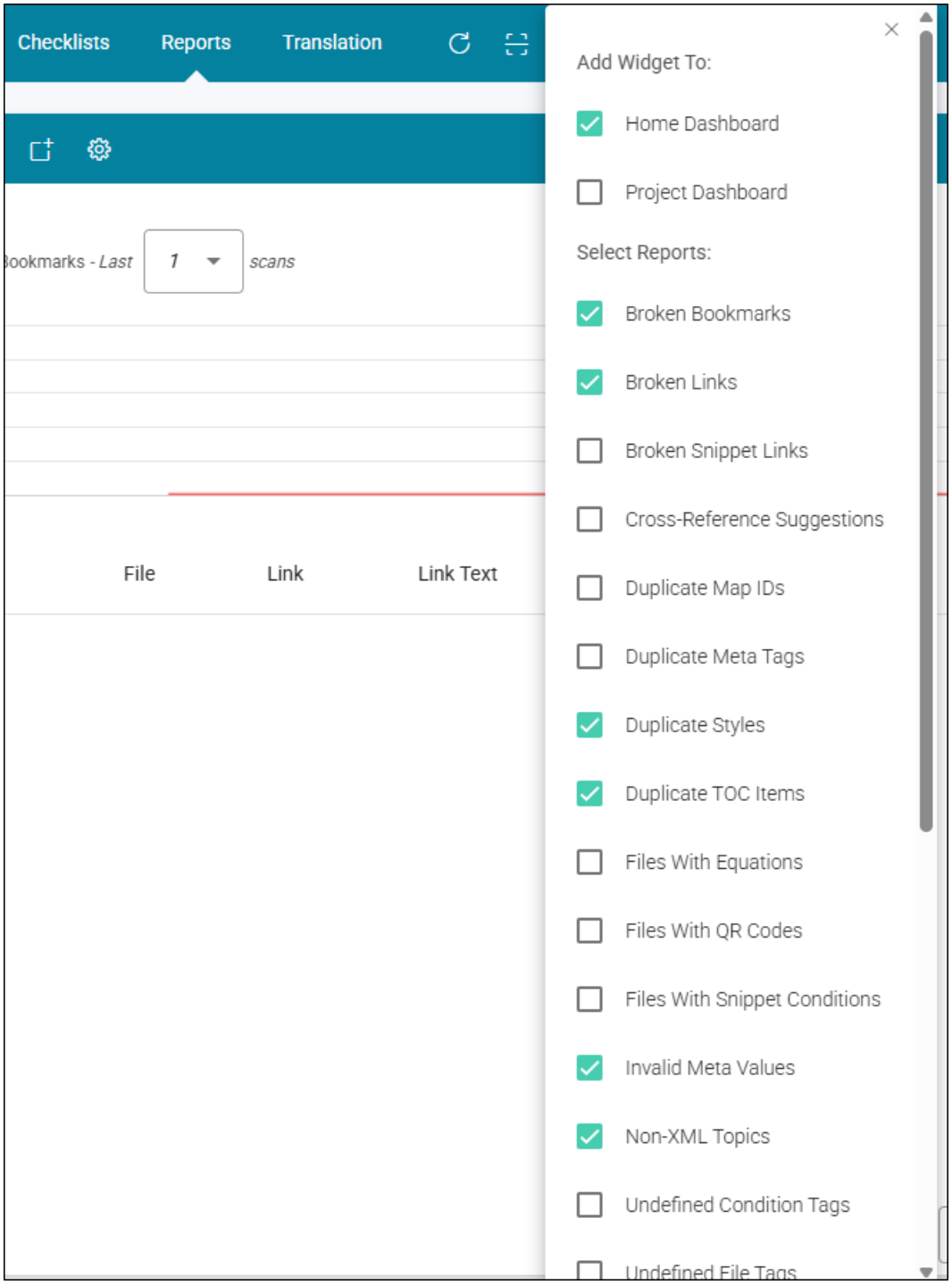
Unused

- 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.

Report Widgets

All of the new reports can also be added as widgets to your Home or Project Dashboard.




Checklists
Reports
Translation
Bookmarks - Last 1 scans
File
Link
Link Text
Add Widget To:
Home Dashboard
Project Dashboard
Select Reports:
Broken Bookmarks
Broken Links
Broken Snippet Links
Cross-Reference Suggestions
Duplicate Map IDs
Duplicate Meta Tags
Duplicate Styles
Duplicate TOC Items
Files With Equations
Files With QR Codes
Files With Snippet Conditions
Invalid Meta Values
Non-XML Topics
Undefined Condition Tags
Undefined File Tags

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