madcap software

USER GUIDE

MADCAP FLARE ONLINE

Widgets Guide

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CHAPTER 1

Introduction

Widgets are objects that let you see information at a glance, including snapshots of your projects, tasks, builds, and storage space.

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.

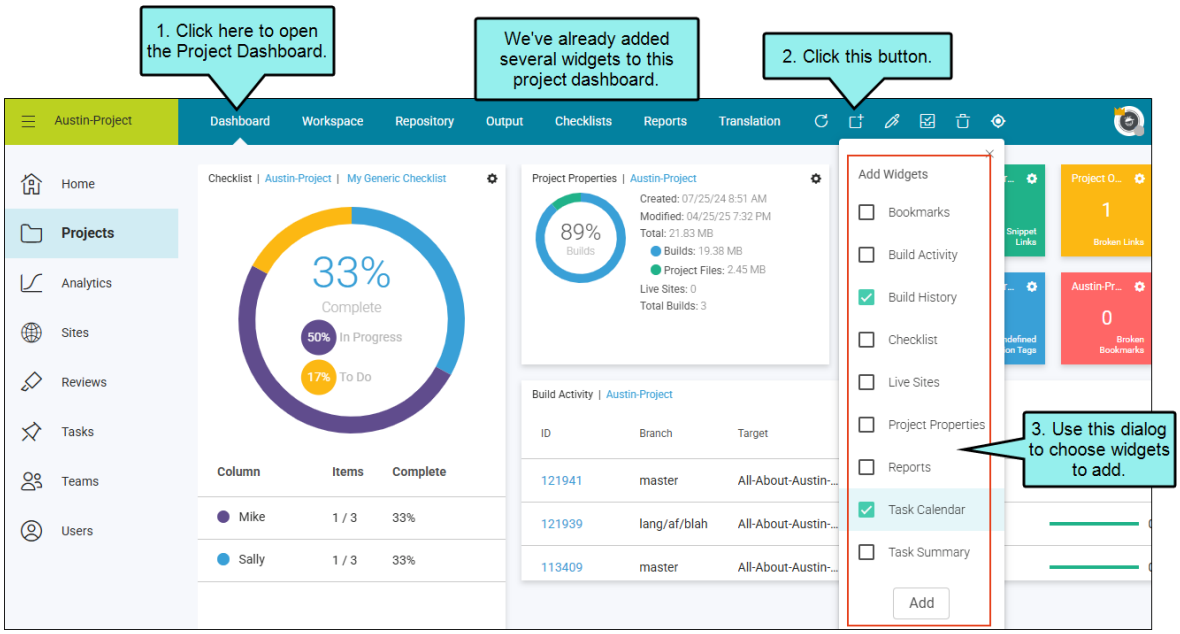
Main Activities

- "Adding Widgets to a Dashboard " on page 6
- "Duplicating Widgets" on page 22
- "Filtering Widgets" on page 28
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CHAPTER 2

Adding Widgets to a Dashboard

After you've added content and information (e.g., projects, tasks) to your license, you will probably want to add widgets to your Home and Project dashboards. For example, on your Home dashboard you might want to see widgets showing storage and usage, project bookmarks, reports, build activity, and a task calendar. And on your project dashboards, you might want to see widgets showing project properties, live builds, checklists, and target build history.

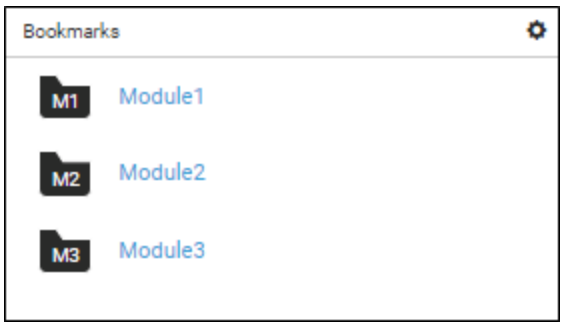


How to Add a Widget to a Dashboard

1. Do one of the following, depending on the part of the user interface you are using:
   - **Home Page** On the left side of the interface, click **Home**.
   - **Project Dashboard** On the left side of the interface, click **Projects**. Click a project name. The Project dashboard opens.
2. In the toolbar click .
3. Select the widget(s) you want to add to the dashboard.

BOOKMARKS

The Bookmarks widget lets you quickly jump to the dashboard for your favorite projects. In the upper-right corner, click  to select projects.

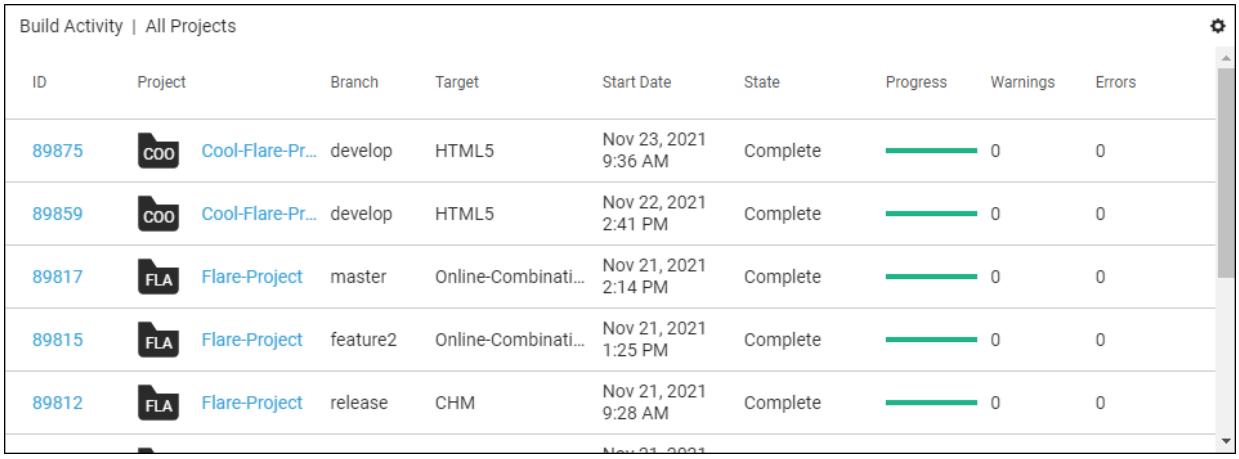


NOTE Data will not display in this widget until you select projects.

BUILD ACTIVITY

The Build Activity widget lets you see all of the builds that are in various states (e.g., failed, completed, canceled, queued). The most recent build appears at the top of the widget.

In the upper-right corner, click ⚙ to filter the widget for a single project, as well as for particular states. The 10 most recent builds are displayed by default, but you can change this setting from the menu.



In this widget, you can view the following:

- [Icon] Click the project icon to open a dialog where you can view information about it and edit it if you have permissions.
- Project The name of the project. Click the name to open the Project dashboard. This column is not shown if the widget is filtered to show only one project.
- Branch The name of the branch selected for the build.
- Target The name of the target.
- Start Date The date and time the build was started.
- State The state of the build (e.g., building, canceled, failed, complete).
- Progress The progress of the build towards completion. This column displays a colored bar, depending on what happens with the build.
  - Light Green The build is in progress.
  - Dark Green The build finished with no errors (although there may be warnings).

- Yellow The build was canceled.
- Red An error prevented the build from finishing.

- Warnings The number of warnings found while building the project. For more information, click the project name to open the Project dashboard, then open the build log.
- Errors The number of errors found while building the project, which prevent the build from being completed. For more information, click the project name to open the Project dashboard, then open the build log.

NOTE Data will not display in this widget until you generate a target in Flare Online.

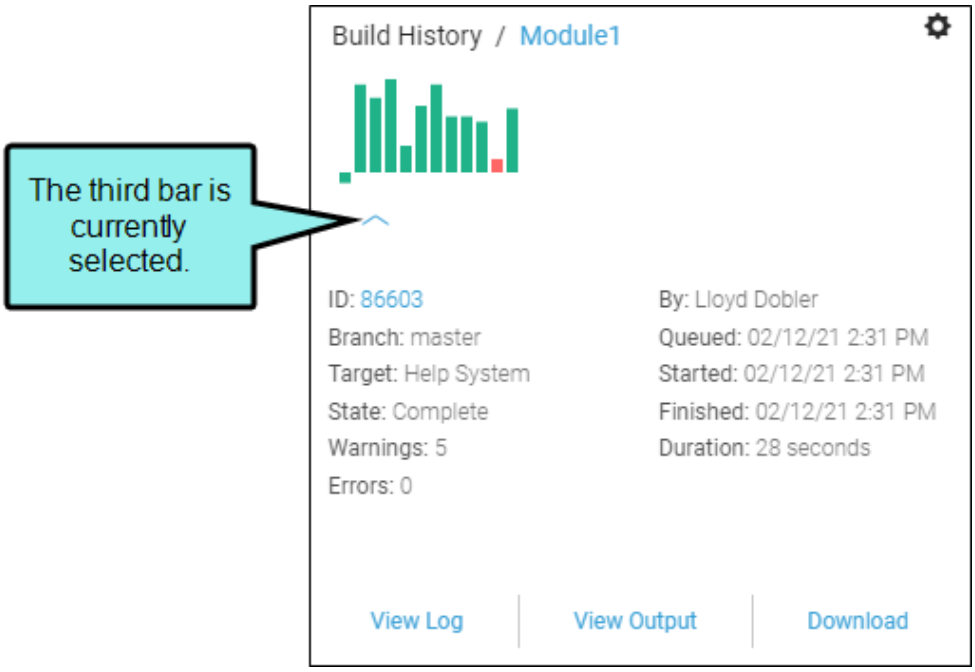
BUILD HISTORY

The Build History widget displays a graph of the recent build history for the selected target. In the upper-right corner, click  to select a project for the widget. You can also type part of a branch and target name to see all the filtered results in the widget.

Each bar in the graph represents a different build for the target, with the oldest build on the left and the most recent one on the right. The color of each bar indicates the success of the build:

- Green Bar The build finished with no errors or warnings (although there may be ignored warnings).
- Yellow Bar The build was canceled.
- Red Bar An error prevented the build from finishing.

The information below the bar graph will change, depending on the bar selected (indicated by an arrow under the bar). You can click any bar in the graph to see its details.



For each bar, you can view the following details:

- ID The identification number of the build.
- Branch The name of the branch for the build.
- Target The name of the target for the build.
- State The state of the build (e.g., completed, failed, canceled).
- Warnings The number of warnings found while building the project.
- Errors The number of errors found while building the project, which prevent the build from completing.
- By The person who initiated the build.
- Queued The date and time that the build was queued.
- Started The date and time that the build started.
- Finished The date and time that the build finished.
- Duration The length of time it took to complete the build.

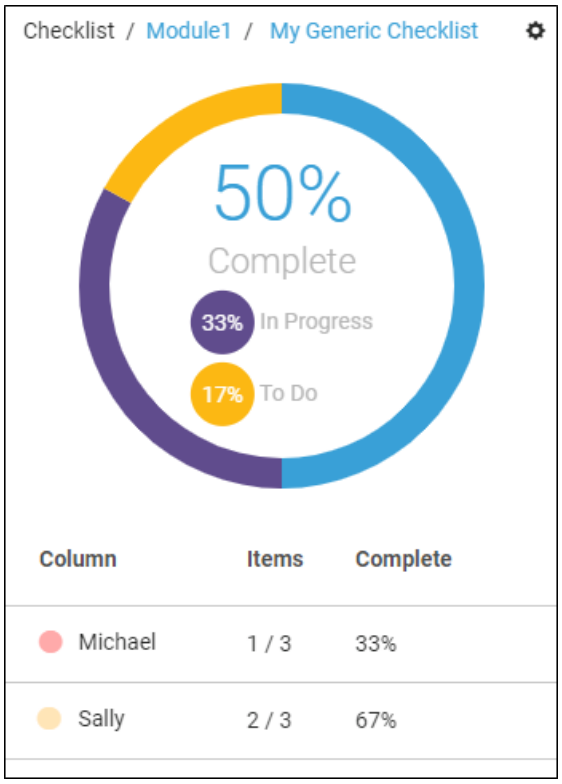
You can also use the buttons at the bottom of the widget:

- View Log Opens the log for the selected build so that you can see information about warnings or errors.
- View Target Opens the output for the selected build.
- Download Lets you download the output files for the selected build.

NOTE Data will not display in this widget until you select a project and target, and until you generate the target in Flare Online.

CHECKLIST

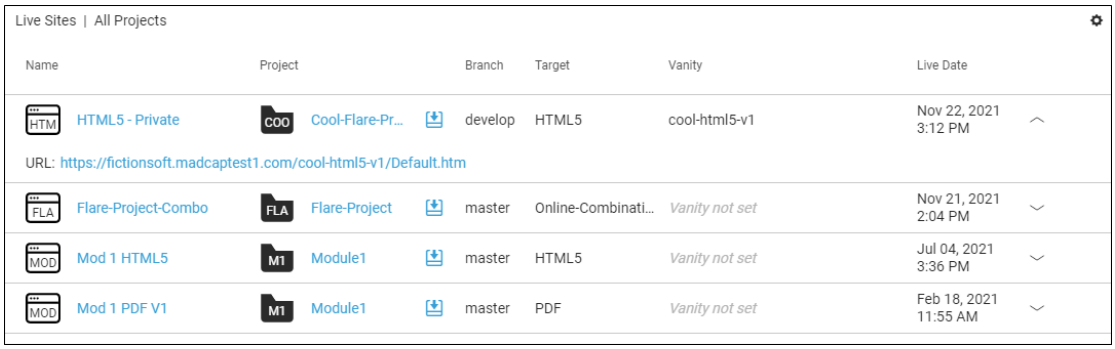
The Checklist widget displays a progress summary for a checklist. In the upper-right corner, click to select a project and checklist for the widget.



NOTE Data will not display in this widget until you select a project and checklist.

LIVE SITES

The Live Sites widget shows all of the sites that are currently set as “live.” In the upper-right corner, you can click to filter the widget by project and the most recent number of sites to display. You can also click a row to expand that site to see the URL.



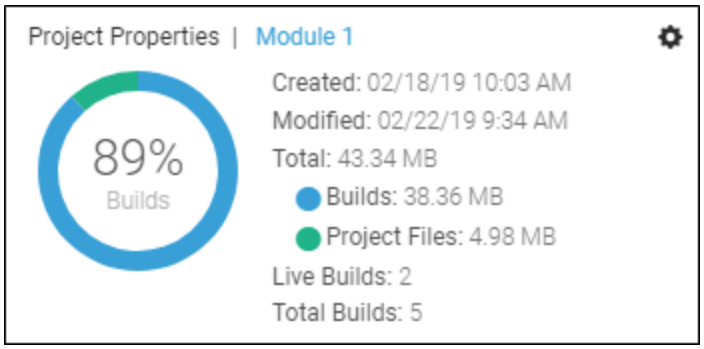
In this widget, you can view or do the following:

- **Name** The name of the site. Click the name to open the Sites page.
- **Project** The name of the project.
- **[Download Icon]** Clicking the icon downloads the output to your computer. Multi-file outputs are downloaded as a ZIP file.
- **Branch** The name of the branch built for the live site.
- **Target** The name of the target.
- **Vanity** The vanity for the live site (if one has been set).
- **Live Date** The date the site was set as “live.”

> **NOTE** Data will not display in this widget until you set a site to "live."

PROJECT PROPERTIES

The Project Properties widget shows important information about the selected project. In the upper-right corner, click to select a project.



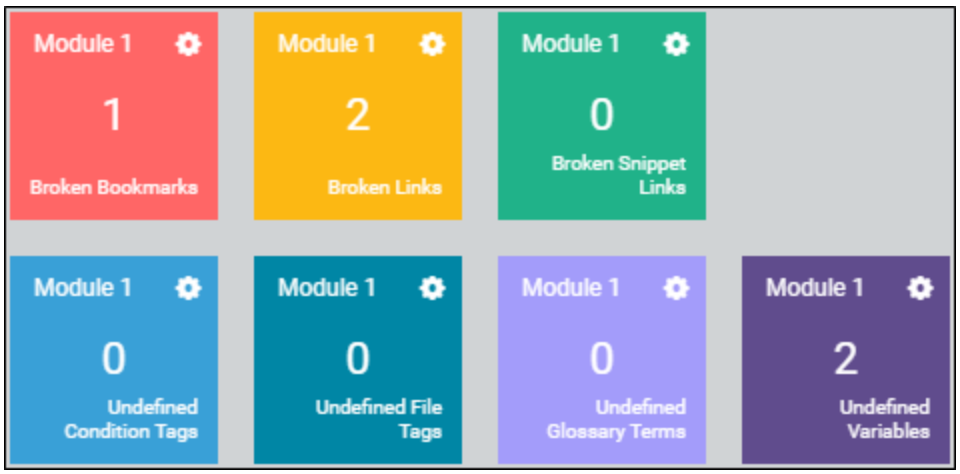
In this widget, you can view the following:

- Created The date the project was created (i.e., added to Flare Online)
- Modified The date the project was last modified (i.e., changes were uploaded to Flare Online, or changes made in Flare Online)
- Total The total size of all the source files and all builds
  - Builds The size of the output files
  - Project Files The size of the source files of the project (Content and Project Folders)
- Live Builds The number of sites set to "live" for this project
- Total Builds The total number of builds in this project

NOTE Data will not display in this widget until you select a project.

REPORTS

The Report widgets are small tiles, each representing a different report. The number on each widget represents the quantity of issues found in the latest scan for that report. You can click the number and the Reports page will open with that report automatically selected.



The following types of reports can be included in widgets.

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

- 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).
- 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.
- 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).

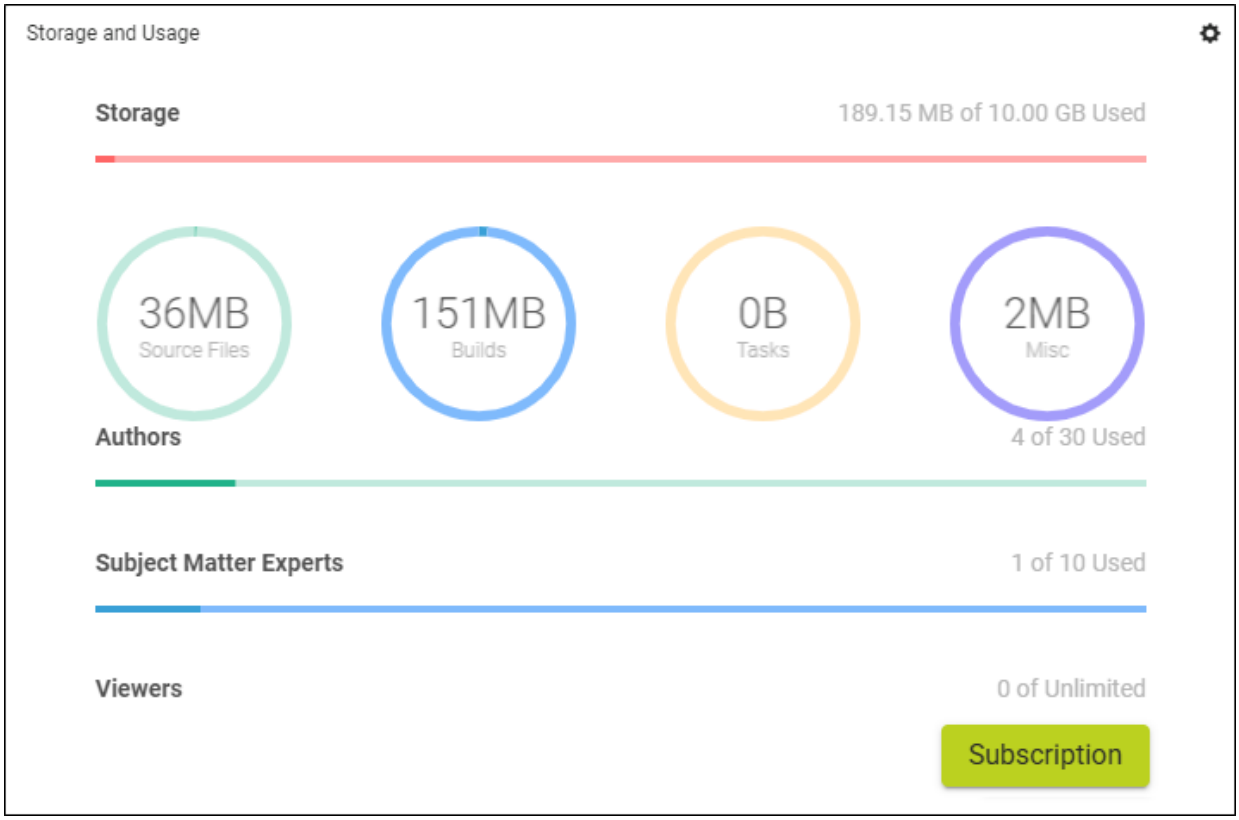
- Undefined Glossary Term Links These are glossary term links in your content that are broken. This might occur, for example, if you have created a new term in a glossary and then inserted that term into a topic as a glossary term link. Later, you remove that term from the glossary. You now have a glossary 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).
- 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.

When you add a new Reports widget to a dashboard, it is initially empty. You need to select a project to populate it. To do this, click  in the upper-right corner and a project and report.

However, it is recommended that you open the Reports page and add widgets from there instead. The reason for this is that you can select multiple reports (rather than one at a time), and you can add them to both the Home and Project dashboard simultaneously.

STORAGE AND USAGE

The Storage and Usage widget shows important information about the MadCap Flare Online license.



- Storage The amount of storage space used and the amount allowed.

  NOTE If you are working in trial mode, you have an unlimited amount of storage space for that period. With a license subscription, the amount of space must be at least as much as the amount you're already using in trial mode. If you do not want that much space, you must first clean up your existing space (e.g., delete builds, projects, or other data taking up unnecessary space) before continuing with a subscription.

- Authors, Subject Matter Experts, and Viewers The number of users currently in the system and the number of users allowed. There is a unique bar for each type of user.

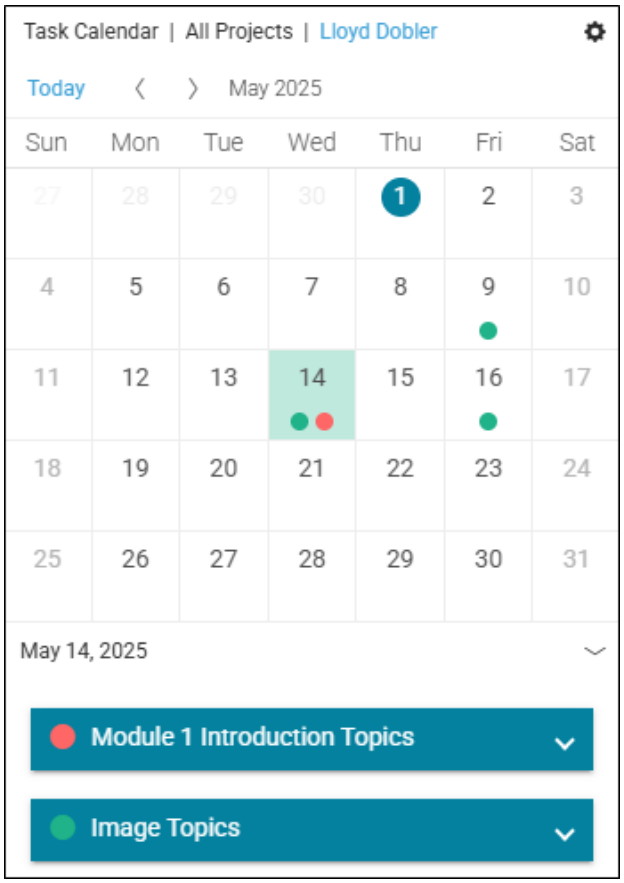
  NOTE If you are working in trial mode, you have an unlimited number of seats for that period. With a license subscription, the number of seats must be at least as high as the number you're already using in trial mode. If you do not want that many seats, you must first delete some users from the license before continuing with the subscription.

- Subscription Click to contact MadCap Software Sales.

NOTE This widget is only available on the Home page.

TASK CALENDAR

The Task Calendar widget shows tasks that are due in a given month. In the upper-right corner, you can click ⚙ to filter the widget by project, user, and priority.

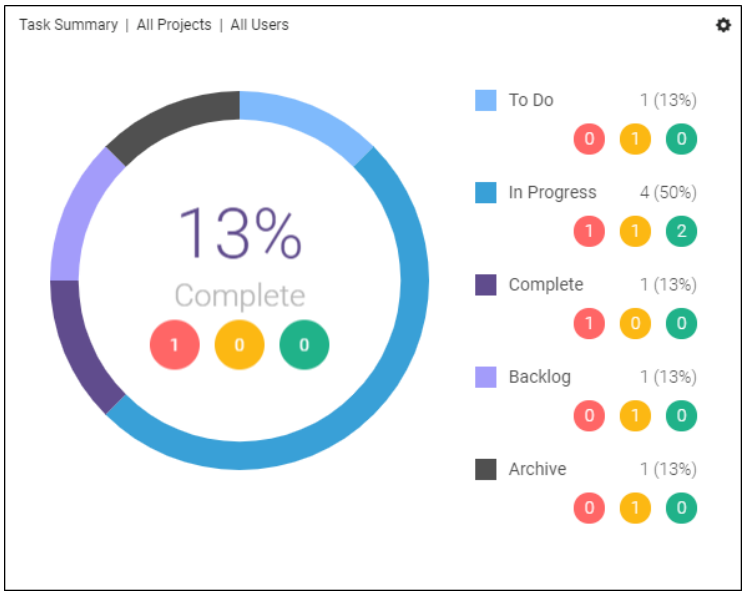


In this widget, you can view the following:

- [Calendar] Colored circles indicate tasks that are due on that date. The color of each circle represents the priority of the task due (red=high, yellow=medium, green=low). Use the arrows on the header bar to navigate between months.
- [Tasks Cards] If you click on a day in the calendar that contains colored circles, the area below has cards for those tasks that are due. Initially, the task cards are collapsed, but you can expand them to see more information. And if you click the name of the task, you can edit it and see even more details.

TASK SUMMARY

The Task Summary widget shows a doughnut chart that breaks down the percentage of tasks in each milestone and storage area (To Do, In Progress, Complete, Archive, Backlog). To the right of the doughnut chart, you can see a summary with the number of tasks at each priority level (High, Medium, Low). In the upper-right corner, you can click ⚙ to filter the widget by project and user.



4. Click **Add**. The widgets are added to the dashboard.

CHAPTER 3

Duplicating Widgets

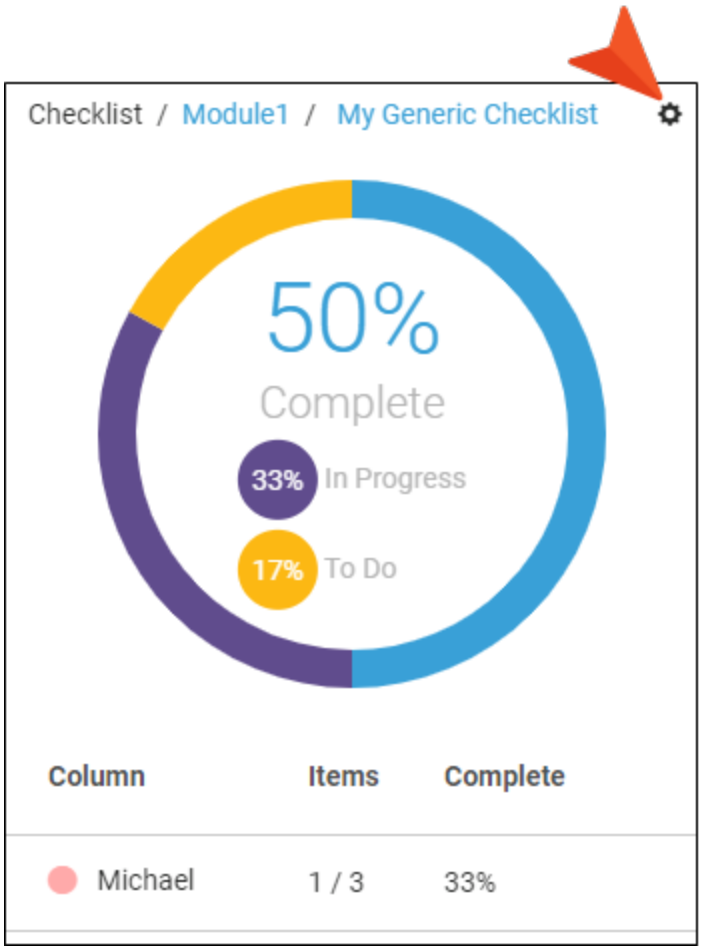
You can create multiple copies of most widgets. Then you can use filters to view different content in each widget (see "Filtering Widgets" on page 28). In addition, if you are using the Project Properties widget on the Project dashboard, you can use a toolbar shortcut to copy it to the Home dashboard. This lets you easily transfer the Project Properties widget to view it alongside other widgets, without needing to re-create your filter settings.

This chapter discusses the following:

How to Duplicate a Widget 23
How to Copy the Project Properties Widget to the Home Dashboard 27

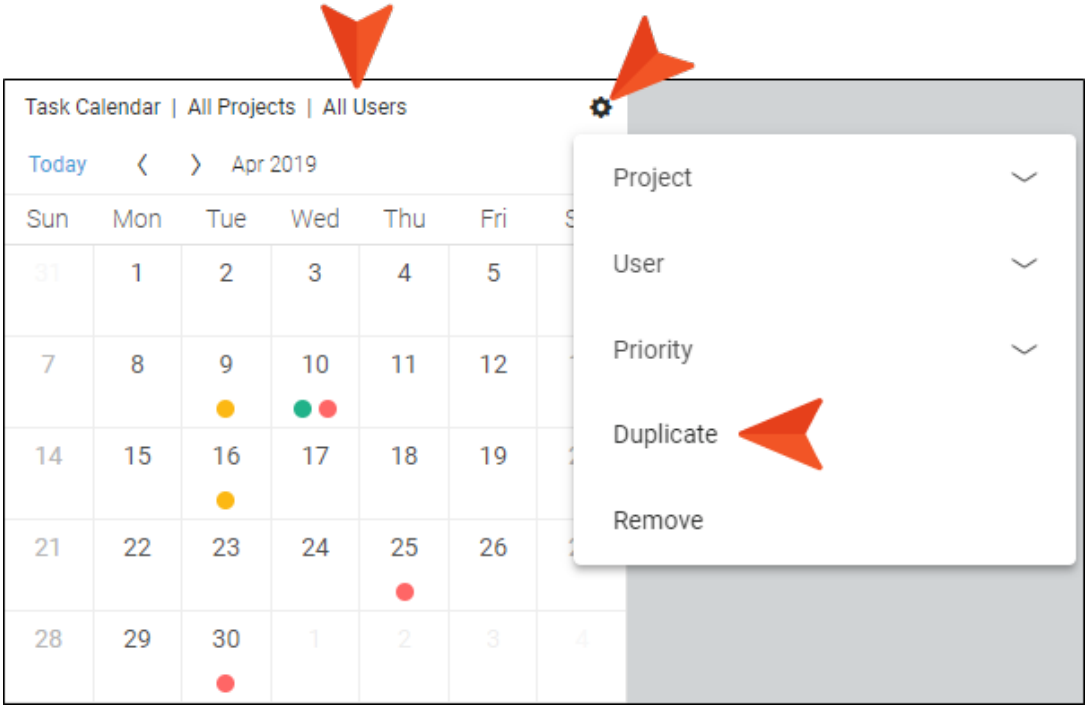
How to Duplicate a Widget

1. Do one of the following, depending on the part of the user interface you are using:
   - **Home Page** On the left side of the interface, click **Home**.
   - **Project Dashboard** On the left side of the interface, click **Projects**. Click a project name. The Project dashboard opens.
2. In the widget you want to duplicate, click ⚙ in the upper-right corner.

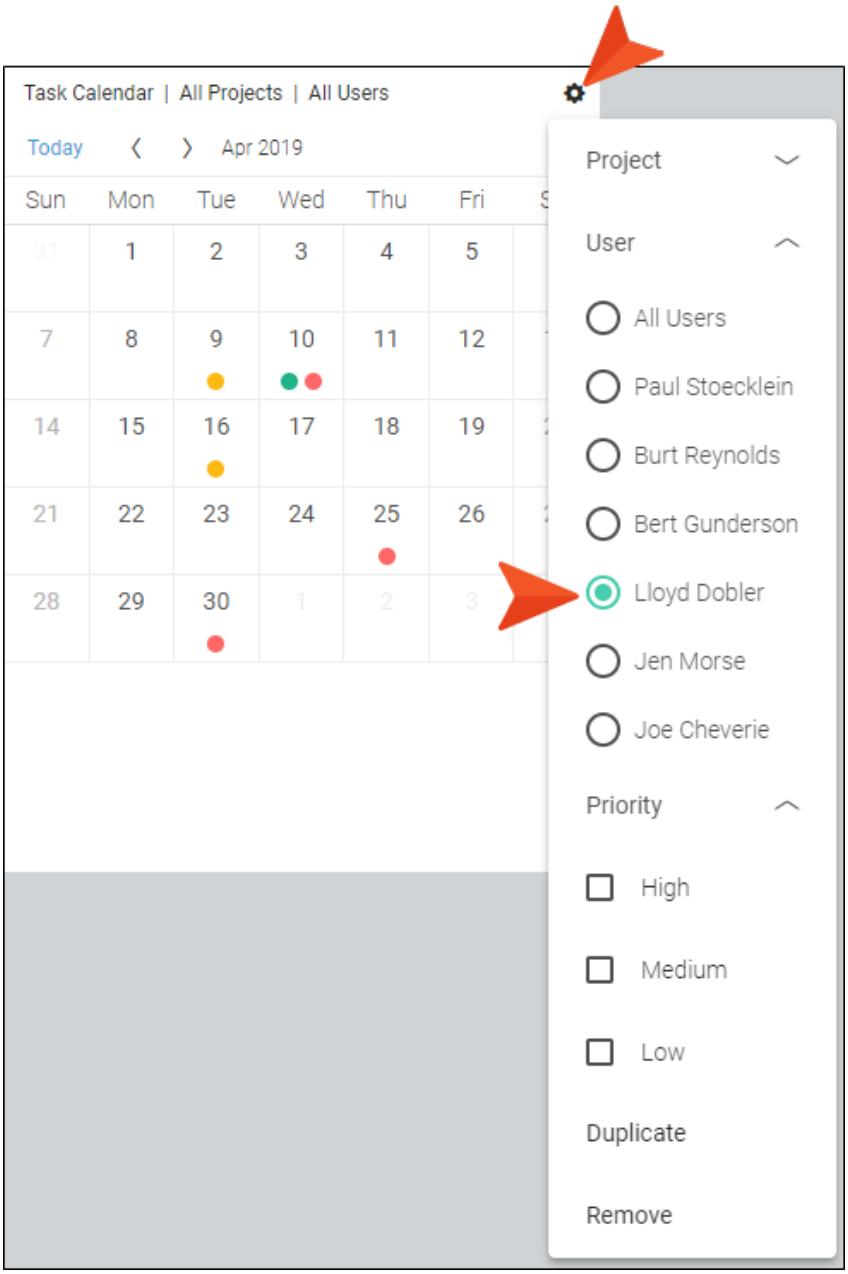


3. In the menu, click **Duplicate**.

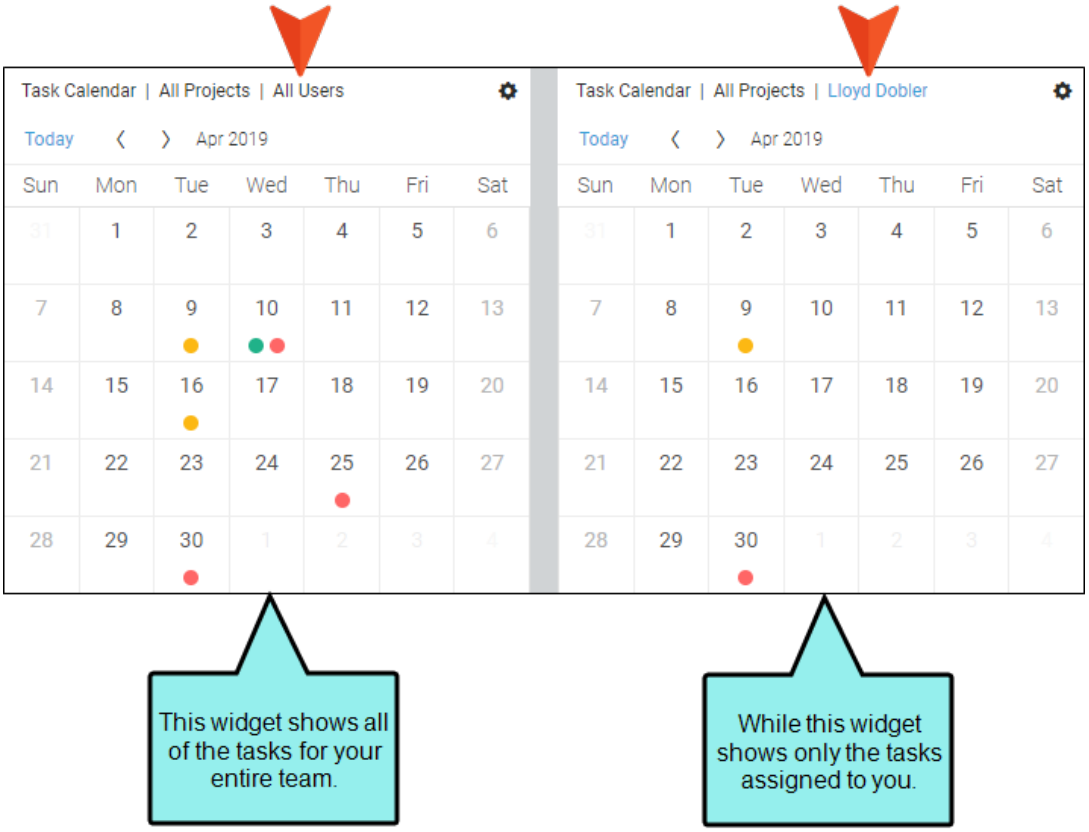
☆ EXAMPLE You manage a team of users. You currently have a Task Calendar widget on your dashboard that is not filtered. It currently shows all tasks for all users, but you want a separate widget that shows only your own tasks. You decide to duplicate the widget, so you click the widget menu ⚙ in the upper-right corner and choose **Duplicate**.



Now you have two Task Calendar widgets that are exactly the same. In the new widget, you click ⚙ and filter it by users, choosing your name.



Keeping the tasks in two different widgets makes it easier to see which tasks belong to you and which ones belong to your team.



How to Copy the Project Properties Widget to the Home Dashboard

1. On the left side of the interface, click **Projects**.
2. Click a project name. The Project dashboard opens.
3. (Optional) If you do not already have a Project Properties widget on the Project dashboard, add a new one. See "Adding Widgets to a Dashboard " on page 6
4. In the toolbar, click .
5. On the left side of the interface, click **Home** to view the Project Properties widget on the Home dashboard.

CHAPTER 4

Filtering Widgets

After you've added widgets to your dashboard, you can filter the widgets to display only the information you want to see. The filter options that are available depend on the type of widget.

How to Filter a Widget

1. Do one of the following, depending on the part of the user interface you are using:
   - Home Page On the left side of the interface, click Home.
   - Project Dashboard On the left side of the interface, click Projects. Click a project name. The Project dashboard opens.
2. In the widget you want to filter, click  in the upper-right corner.
3. In the menu, click the drop-down arrow next to the area you want to filter (e.g., Project, User, Priority), and make your selection(s) under it. If there are multiple drop-downs, Flare Online will automatically expand the next one when you make your selection in the first drop-down. Radio buttons (circles) mean that you can make one selection, while check boxes mean that you can make multiple selections.
4. When you are finished, click off the menu.

CHAPTER 5

Removing Widgets

If you no longer need a widget on your dashboard, you can remove it.

How to Remove a Widget

1. Do one of the following, depending on the part of the user interface you are using:
   - Home Page On the left side of the interface, click Home.
   - Project Dashboard On the left side of the interface, click Projects. Click a project name. The Project dashboard opens.
2. In the widget you want to remove, click .
3. In the menu, click Remove. The widget is removed from the dashboard.

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