madcap
software

MADCAP FLARE 2024

SharePoint

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Introduction

Flare supports integration with Microsoft SharePoint, including SharePoint Online (or SharePoint 365). From Flare you can access, edit, and synchronize SharePoint files.

SharePoint is like a scaled-down version of a source control tool, with the ability to check out and check in files. Many organizations use a source control tool to manage files that are part of products and will be shipped to customers, while using SharePoint mostly for internal files to be shared among colleagues.

SHAREPOINT FILES

PROJECT

OUTPUT
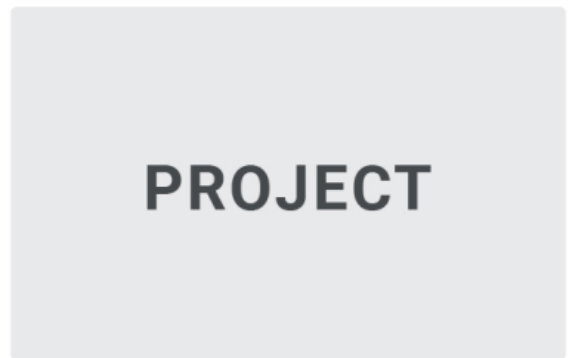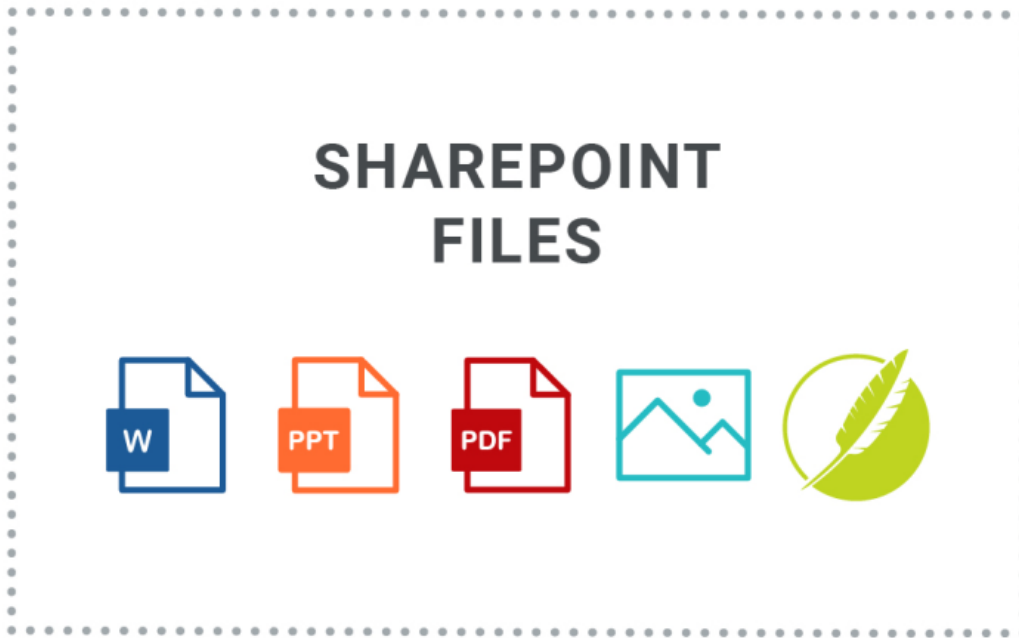
Process

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> ☆ **EXAMPLE** You need several people—such as subject matter experts, managers, or peers—to review your topics. You can always email review packages to those individuals, but an alternative is to upload the review package to a SharePoint server. Each reviewer can check out the package, make their comments, and check the file back in. You can then bring the review package back into your project, integrating the updated topics into your project.

> 🗒 **NOTE** Due to limitations with Microsoft, you might experience an error when publishing output to a SharePoint server. If this occurs, please consult your SharePoint administrator.

Connecting to a SharePoint Server

From the SharePoint Explorer in Flare, you can connect to a specific SharePoint server. You can then use that window pane to access the files on that server.

How to Connect to a SharePoint Server

1. Select **View > SharePoint Explorer**.

2. In the local toolbar click . The Connect to SharePoint Server dialog opens.

3. Enter the path to the SharePoint server.

4. Click to validate the server.

5. Click **OK**. The SharePoint Explorer is populated with files from the server.

CHAPTER 3

Checking Out SharePoint Files

You can check out SharePoint files from the Flare interface. Checking out a file simply means to activate a "flag" on the SharePoint site indicating that you want to access the file and prevent others from editing it and conflicting with your changes.

This chapter discusses the following:

▍How to Check Out SharePoint Files

1. Select **View > SharePoint Explorer**.

2. Locate the file(s) that you want to check out. You can use the "multi-view" to do this.

📁	Shows or hides the folders that the files are stored in.
▭▾	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
🗇	Collapses the folders.
📂	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Select the file(s) that you want to check out. If the window pane is split into two halves, you can select the appropriate folder on the left side and select the files on the right side. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

4. Right-click the file(s) and from the context menu select **Check Out**.

5. In the dialog that opens, click **Check Out**.

> 📝 **NOTE** By default there is a check mark next to all files that were selected. If necessary, you can click any check box to remove the check mark, which means that file will not be checked out when you are finished.

How to Undo a Check-Out of SharePoint Files

1. Select **View > SharePoint Explorer**.

2. Locate the file(s). You can use the "multi-view" to do this.

	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	Collapses the folders.
	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Select the file(s). If the window pane is split into two halves, you can select the appropriate folder on the left side and select the files on the right side. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

4. Right-click the file(s) and from the context menu select **Undo Check Out**.

5. In the dialog that opens, click **Undo Check Out**.

Opening SharePoint Files

After connecting to a SharePoint server, you can open files to edit them.

One option is that you can open the *actual SharePoint files* that exist on the server (if you decide, for example, to use the check-out/check-in features). See "Checking Out SharePoint Files" on page 9 and "Checking In SharePoint Files" on page 15.

Another option is to open copies of those files in your project (if you decide to use file mappings and synchronization). See "Copying and Mapping Files" on page 17 and "Synchronizing SharePoint Files" on page 23.

This chapter discusses the following:

❚ How to Open a File Existing on the SharePoint Server

1. Select **View > SharePoint Explorer**.

2. Locate the file that you want to open. You can use the "multi-view" to do this.

📁	Shows or hides the folders that the files are stored in.
⬜▾	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
🗐	Collapses the folders.
📂	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Do one of the following:

   - Double-click the file.

   - Right-click the file and select **Open**.

   - Click on the file, and in the local toolbar click 📄.

   If it is a file type not supported in Flare, you will be directed to open the file in its default application.

▎How to Open a Copy of a SharePoint File in a Project

1. Open the Content Explorer.

2. All copies of SharePoint files that you added to your project will be located somewhere in the Content folder (in the root itself or under subfolders where you may have placed files when copying them to Flare). Locate the file that you want to open. You can use the "multi-view" to do this.

	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	Expands the folders.
	Collapses the folders.
	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Do one of the following:

   ▪ Double-click the file.

     OR

   ▪ Right-click the file and select **Open**.

     OR

   ▪ Click on the file, and in the local toolbar click .

   If it is a file type not supported in Flare, you will be directed to open the file in its default application.

Checking In SharePoint Files

When you are finished working on a SharePoint file that you checked out, you can check it back in so that others can edit it.

▌ How to Check In SharePoint Files

1. Select **View > SharePoint Explorer**.

2. Locate the file(s) that you want to check in. You can use the "multi-view" to do this.

📁	Shows or hides the folders that the files are stored in.
⬜ ▾	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
🗐	Collapses the folders.
📤	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Select the file(s) that you want to check in. If the window pane is split into two halves, you can select the appropriate folder on the left side and select the files on the right side. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.

4. Right-click the file(s) and from the context menu select **Check In**.

5. Click **Check In**.

> 🗒 **NOTE** By default there is a check mark next to all files that were selected. If necessary, you can click any check box to remove the check mark, which means that file will not be checked in when you are finished.

Copying and Mapping Files

After you connect to a SharePoint server, you can copy any of the SharePoint files to your project, mapping them to the source files at the same time.

This is a different process than that of importing files, which you can do elsewhere in Flare. Files that are brought into a project using a traditional import process can be connected to the source file, but only in one direction (i.e., files can be updated from the source to the imported file in the project). On the other hand, files that are copied from the SharePoint Explorer can be connected via mappings to the source files in two directions (i.e., files can be updated from the source to the copied file or from the copied file to the source).

▍How to Copy and Map SharePoint Files

1. Select **View > SharePoint Explorer**. The SharePoint Explorer opens.

2. Locate the file that you want to add to the project. You can use the "multi-view" to do this.

|	
	Shows or hides the folders that the files are stored in.
	Shows or hides the files. If you click this button when the "Show Folders" button is selected, the area splits into two halves. The folder is shown on the left side, and the files and subfolders within it are shown on the right.
	Collapses the folders.
	If the "Show Files" button is the only one selected, you can click this button to move up one folder level.

3. Right-click on the file and from the context menu select **Copy to Project**.

4. In the dialog that opens, find and select the location in your project that you want to add the file. Again, you can use the multi-view buttons to navigate to folders in your project.

5. Click **OK**.

6. In the Copy to Project dialog select **Keep file synchronized (create mapping)**.

7. Click **OK**. The file is added to the project, as you can see by opening the Content Explorer. If you selected to map the file, a small icon ▣ is shown next to it.
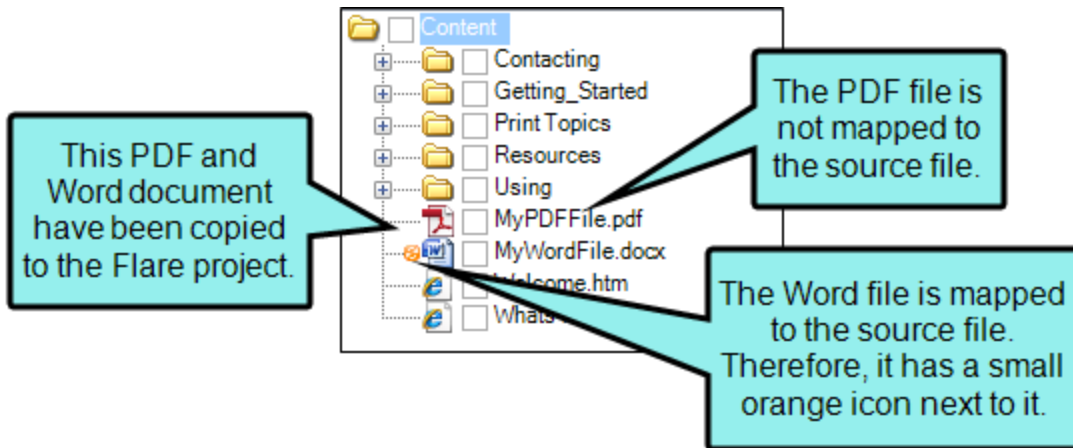
Managing Mappings of Files

If you copy SharePoint files to your project, you can create mappings (connections) between the copies of those files that you bring into your project and the source files on the SharePoint server. You can do this at the point that you copy those files into your project (see "Copying and Mapping Files" on page 17). You can also manage these mappings whenever necessary through the Map Files and Folders dialog. This involves the ability to create, change, or remove mappings.

▌How to Manage Mappings of SharePoint Files

1. Select **Project > Manage Mappings**.

2. Use the Map Files and Folders dialog to do any of the following.

   ## TO CREATE OR CHANGE A MAPPING

   a. If you are creating a new mapping, in the blank row click in the **Project Path** cell. If you are changing an existing mapping, in the appropriate populated row click in the **Project Path** cell.

   b. In that cell click [...].

   c. In the dialog that opens, find and double-click the copy of the file located in your project.

   d. Click in the **External Path** cell.

   e. In that cell click [...].

   f. In the dialog that opens, find and double-click the source file located outside of your project.

   ## TO REMOVE A MAPPING

   a. Click on the icon on the far left side of the row you want to delete. This highlights the entire row.

   b. At the bottom of the dialog click **Remove**.

3. Click **OK**.

CHAPTER 8

Other Activities for SharePoint

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

This chapter discusses the following:

❚ Synchronizing SharePoint Files

After you map project files to source files located on a SharePoint server, you can synchronize them to ensure that each file contains the same content. This process lets you import content from SharePoint files, export content from mapped files in the project to SharePoint, or keep the most recently modified content.

How to Synchronize SharePoint Files

1. Select **Project > Synchronize Files**.

   The Synchronize Files dialog opens. By default only files that are out of sync are listed. However, you can click ![icon] to also show files that are already synchronized, and you can click ![icon] to refresh the list.

2. From the drop-down field at the top, select any of the following options.

   - **Synchronize Files** This imports external source files into the project, overwriting the copies (if the external files have been modified most recently). And it also exports copies of files in the project, overwriting external source files (if the copies in the project have been modified most recently).

   - **Import Files** For all out-of-sync files, this imports external source files into the project, overwriting the copies (regardless of which files have been modified most recently).

   - **Export Files** For all out-of-sync files, this exports copies of files in the project, overwriting external source files (regardless of which files have been modified most recently).

3. Make sure there is a check mark next to each pair of files that you want to synchronize and click **Synchronize**.

4. In the message that displays, click **OK**.

> 🗒 **NOTE** In the list of files, you can click ![icon] to see more details, such as the modified date and file size.

❚ Merging Mapped Files

If you attempt to synchronize files and Flare detects a conflict (i.e., a mapped file has been modified both locally and in its mapped location), a dialog opens so that you can take the appropriate action.

In the Synchronize Files dialog, you can tell if a conflict exists because a warning icon will display next to the files in question.

How to Merge Mapped Files

1. Go through the process of synchronizing external or SharePoint files. See "Synchronizing SharePoint Files" on the previous page. After you click the **Synchronize** button, the Resolve Conflicts dialog opens if a conflict exists.

2. Click **Auto Merge All**.

   If changes in the files do not conflict with each other (i.e., if the changes occur in different parts of the files so that they will not affect one another), this will merge all changes. A message lets you know that a backup of your local copy has been made. This lets you restore that file if you do not want to keep the merged version You do not need to complete the rest of the steps below.

   However, if your the changes in the files do conflict with each other (i.e., they occur in the same places in the files), a message displays to tell you. In this case, continue with the next step.

   > 🗒 **NOTE** This option is not available if you are synchronizing a file that is not native to Flare.

3. Click **OK** on the conflict message.

4. In the Resolve Conflicts dialog click **Resolve**. The Resolve Conflict dialog opens. From this dialog, you can choose from the following options:

   - **Merge changes in merge tool** Opens a merging interface, which lets you see exactly what changes were made and choose which to keep.

> 🗒 **NOTE** This option is not available if you are synchronizing a file that is not native to Flare.

- **Undo my local changes** Automatically removes changes in the local file in your project and keeps changes from the file in the mapped location.

- **Discard external changes** Automatically removes changes from the file in the mapped location and keeps changes in the local file in your project.

5. If you selected the first option, the Merge Changes dialog opens. Use this dialog to view and select changes. You can take actions in the following ways:

   - **Right-click icon** You can right-click on the icon next to a change on either the local or external side. This displays a context menu, which lets you either keep or ignore a particular change.

   - **Left-click icon** You can left-click on the icon next to a change on either the local or external side. When you do this, the change from one side is kept and the change from the other side is ignored. If you left-click the icon again, the results are toggled; the first change is ignored and the other is kept.

   - **Type content** If you want to use the local changes as well as those from the external file, and even tweak the paragraph a bit more, you can click in the area at the bottom of the dialog and simply type content.

   - **Previous/next conflict** When you are finished resolving the first conflict, you can use the "Previous Conflict" and "Next Conflict" buttons at the bottom of the dialog to work on other conflicts in the file.

6. (Optional) If you want to change the colors associated with the changes, you can click **Options**.

7. (Optional) By default the files are shown in a WYSIWYG (What You See Is What You Get) view. But you can click **Merge as Text** to work in the markup instead.

8. After all conflicts have been resolved, a message lets you know that a backup of your local copy has been made. This lets you restore that file if you do not want to keep the merged version. Click **OK**.

9. Click **OK** in the other dialogs that open.

Icons for File Differences

Following are descriptions of the various basic icons you might see in the Merge Changes dialog when merging files.

Changed Content This indicates that the content has changed but there is no conflict. Therefore, no action is needed.

Changed Tag This is the same as the "Changed Content" icon, except the content has not changed, just a tag, such as a style or span.

New Content This indicates that there is new content, but there is no conflict with your changes. Therefore, no action is needed.

Deleted This indicates that content was deleted, but there is no conflict with your changes. Therefore, no action is needed.

Following are descriptions of conflict icons.

Changed Content—Conflict This indicates that the content has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.

Conflict Change—Accepted This indicates that a change with a conflict has been accepted after clicking on ▧. The bottom pane of the Merge Changes dialog updates to show the accepted content.

Conflict Change—Not Accepted This indicates that a change with a conflict will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays ▧, the opposite pane where the conflict exists will display ▧.

Changed Tag—Conflict This indicates that the tag has changed and a conflict exists. Therefore, user action is required. This icon appears in both the left and right panes of the Merge Changes dialog at the spot of the conflict. You must click on one of the icons to "Accept" that particular change.

Conflict Tag—Accepted This indicates that a change with a conflict in a tag has been accepted after clicking on ▧. The bottom pane of the Merge Changes dialog updates to show the accepted content.

Conflict Tag—Not Accepted This indicates that a change with a conflict in a tag will not be accepted. When you accept a conflict change and that side of the Merge Changes dialog displays ▧, the opposite pane where the conflict exists will display ▧.

▍Setting Color Options for Mapped File Differences

If you need to merge mapped files, you can view differences between the files. When viewing file differences between a local copy of a file and the original file located elsewhere, you can select color options to display the files. Color coding makes it easier to discern where differences between files occur.

How to Set Color Options for Mapped File Differences

1. Go through the process of merging mapped files.

2. In the local toolbar of the Merge Changes dialog, click **Options**. The File Differences dialog opens.

3. Change the text or background color for any of the difference types. To do this, simply click in the appropriate **Text** or **Background** cell and select **Pick Color**. In the Color Picker dialog, choose the new color.

4. Click **OK**.

APPENDIX

PDFs

The following PDFs are available for download from the online Help.

▌Tutorials

Getting Started Tutorial

Autonumbers Tutorial

Back-to-Top Button Tutorial

Context-Sensitive Help Tutorial

Custom Toolbar Tutorial

eLearning Tutorial—Basic

eLearning Tutorial—Advanced

Image Tooltips Tutorial

Lists Tutorial

Meta Tags Tutorial

Micro Content Tutorial—Basic

Micro Content Tutorial—Advanced

Responsive Output Tutorial

Single-Sourcing Tutorial

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