

**MADCAP FLARE DESKTOP 2025**

# Flare Online Integration

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# CONTENTS

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## CHAPTER 1

Introduction ..... 6

## CHAPTER 2

General Information for MadCap Flare Online and Flare Desktop ..... 10

- Flare Online Window Pane ..... 11
- Source Control and MadCap Flare Online ..... 13
- Moving From Dual-Bound to Single-Bound ..... 33
- Flare Online Analytics ..... 36
- Private Outputs in MadCap Flare Online ..... 45
- Flare Desktop Features Not Supported in MadCap Flare Online ..... 65
- Security and MadCap Flare Online ..... 69
- MadCap Flare Online Features Per Output Type ..... 82

## CHAPTER 3

Logging In and Out ..... 83

- Logging In to Flare Online ..... 84
- Logging Out of Flare Online ..... 84
- The SSO Login Experience ..... 85

## **CHAPTER 4**

Binding a Project to MadCap Flare Online .....	94
Permission Required? .....	95
How to Upload (Bind) a Project to Flare Online .....	96

## **CHAPTER 5**

Importing Projects From Flare Online .....	99
Permission Required? .....	101
How to Import a Project from Flare Online .....	102

## **CHAPTER 6**

Viewing Project Properties .....	103
How to View Project Properties in Flare Desktop .....	104

## **CHAPTER 7**

Source Control Activities .....	105
Committing and Synchronizing (Pull, Push) in a Single-Bound Model .....	106
Pushing in a Dual-Bound Model .....	111

## **CHAPTER 8**

Analytics Activities .....	113
Creating and Editing Analytics Keys .....	114
Associating Analytics Keys With Targets .....	115
Managing Analytics Keys .....	116
Downloading Analytics .....	117

## **CHAPTER 9**

Flare Online Review Process .....	118
Workflow .....	120

Benefits .....	132
What's Noteworthy? .....	133
Sending Files for Review in Flare Online .....	134
Closing Flare Online Review Files .....	143
Accepting or Rejecting Tracked Changes (Flare Online Reviews) .....	147
Accepting Reviewed Files .....	151

## **CHAPTER 10**

Publishing Directly to Flare Online .....	157
Permission Required? .....	160
How to Publish Directly to Flare Online .....	160
Command Line .....	162
What's Noteworthy? .....	164

## **CHAPTER 11**

Removing Bindings .....	165
Permission Required? .....	166
How to Remove a Binding from a Project in Flare Online ..	166

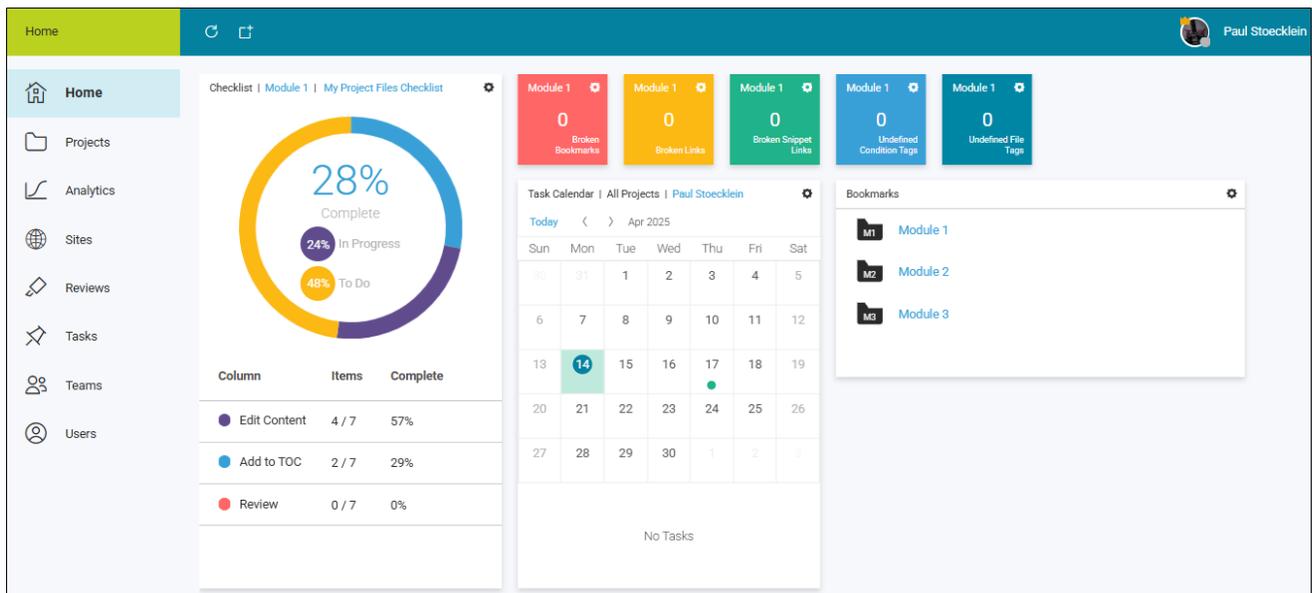
## **APPENDIX**

PDFs .....	167
Tutorials .....	167
Cheat Sheets .....	168
User Guides .....	169

## CHAPTER 1

# Introduction

MadCap Flare Online is a cloud-based platform that lets you plan, track, and manage the processes, content, and teams that are at the heart of your organization.



MadCap Flare Online's integration with MadCap Flare Desktop lets you store copies of your projects in Flare Online, continue to work on them locally in Flare Desktop, and keep both sets of copies in sync. You can use Flare Online to quickly build and publish output (and roll back when necessary) without the need to involve an IT department. Custom vanity URLs let you produce meaningful paths for your outputs. You can also send topics and snippets for review in Flare Online, as well as use custom checklists to track your progress in Flare projects.

Flare Online also lets you perform many of the essential authoring tasks that are necessary in the development of a project and its output. Therefore, you might be wondering, "If I have Flare Online, do I need Flare Desktop at all?" The answer to that is going to be different, depending on your needs. Some people might only need Flare Online. Others might only need Flare Desktop. And still others might need both, involving the movement of content between the two applications.

- **Flare Online** is a great choice if you want a very simplified process with the most essential documentation elements, as well as the special offerings that are available only in the cloud (e.g., hosting output, collaborative authoring, analytics).
- **Flare Desktop** is ideal if you must work locally and need advanced authoring features that have been developed over decades (e.g., context-sensitive Help, meta tags, heavy customization of print-based outputs).

Flare Online Benefits	Flare Desktop Benefits
<ul style="list-style-type: none"><li>▪ Collaborative authoring</li><li>▪ Integrate with ChatGPT (AI Assist)</li><li>▪ Configure single sign-on (SSO)</li><li>▪ Host output with custom domains and vanities</li><li>▪ Publish private output</li><li>▪ View analytics on output</li><li>▪ Assign user permissions</li><li>▪ Use integrated checklists</li><li>▪ Collaborate with reviewers</li><li>▪ Create and manage tasks</li><li>▪ Integrate with Slack</li><li>▪ Easy cloud-based translation process</li><li>▪ Customize dashboards and widgets</li><li>▪ Communicate via message center</li></ul>	<ul style="list-style-type: none"><li>▪ Highly specialized authoring features</li><li>▪ Editor structure bars</li><li>▪ Dynamic topic preview</li><li>▪ Full-featured text editor</li><li>▪ Heavy-duty print-based customization</li><li>▪ Micro content (enhanced search, chatbots, etc)</li><li>▪ Context-sensitive help</li><li>▪ Link viewer</li><li>▪ Advanced cascading stylesheet editing</li><li>▪ Integrated responsive web design</li><li>▪ Learning and development integration</li><li>▪ Various search engine choices</li><li>▪ Creation of publishing destinations</li></ul>

For more complete information about Flare Online, see its Help system:

[documentation.madcapsoftware.com](https://documentation.madcapsoftware.com)

## General Information

- "Flare Online Window Pane" on page 11
- " Source Control and MadCap Flare Online" on page 13
- "Flare Online Analytics" on page 36
- "Private Outputs in MadCap Flare Online" on page 45
- "Flare Desktop Features Not Supported in MadCap Flare Online" on page 65
- "Security and MadCap Flare Online" on page 69
- "MadCap Flare Online Features Per Output Type" on page 82

## Main Activities

- "Logging In and Out" on page 83
- "Binding a Project to MadCap Flare Online" on page 94
- "Importing Projects From Flare Online" on page 99
- "Viewing Project Properties" on page 103
- "Source Control Activities" on page 105
- "Analytics Activities" on page 113
- "Sending Files for Review in Flare Online" on page 134
- "Publishing Directly to Flare Online" on page 157
- "Removing Bindings" on page 165



**NOTE** At this time, you cannot perform most source control tasks from the Flare Online interface. This can be done only from the Flare project.



**NOTE** MadCap Flare Online is sold separately from Flare Desktop. Please contact MadCap Software Sales for more information.



**NOTE** Another product option that MadCap Software offers is Xyleme Syndicate, which is a cloud-based content delivery platform that extends the reach capabilities of your content. You can create a Syndicate publishing destination and automate the publishing process to upload documents (e.g., eLearning, video, PDF, HTML) from Flare Desktop to a Syndicate folder.

# General Information for MadCap Flare Online and Flare Desktop

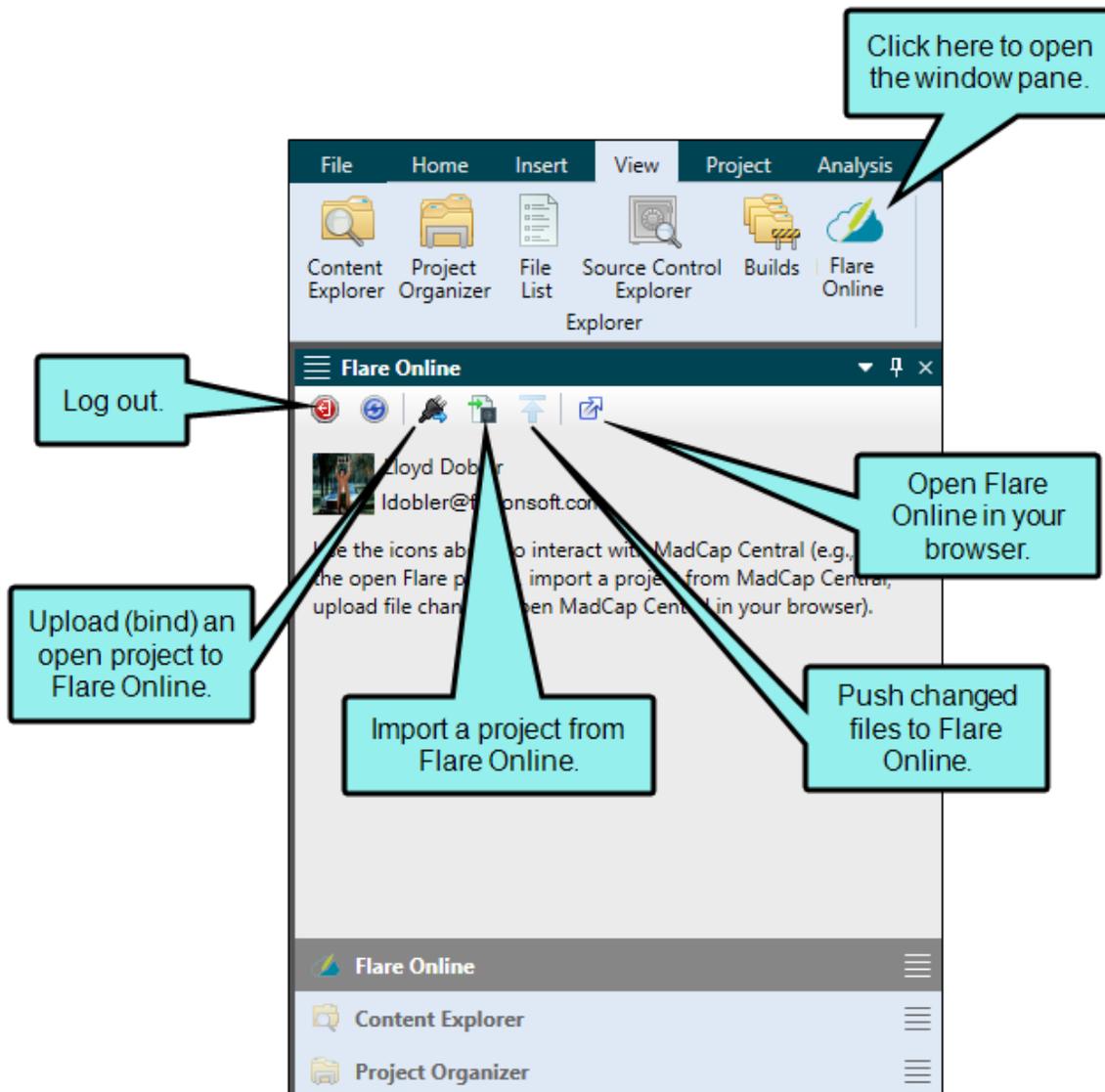
There are various pieces of general information you should know if you plan to use this feature.

This chapter discusses the following:

Flare Online Window Pane .....	11
Source Control and MadCap Flare Online .....	13
Moving From Dual-Bound to Single-Bound .....	33
Flare Online Analytics .....	36
Private Outputs in MadCap Flare Online .....	45
Flare Desktop Features Not Supported in MadCap Flare Online .....	65
Security and MadCap Flare Online .....	69
MadCap Flare Online Features Per Output Type .....	82

# Flare Online Window Pane

The Flare Online window pane in Flare Desktop lets you upload (bind) and import projects, as well as push project changes to Flare Online. Additionally, you can see project properties, log in and out of your Flare Online account, and launch the Flare Online portal in your browser.



The screenshot shows the Flare Online web interface. At the top, there is a dark blue header with the text 'Flare Online' and a hamburger menu icon. Below the header is a navigation bar with several icons. The main content area shows the user profile for 'Lloyd Dobler' with the email 'ldobler@fictionsoft.com'. Below the profile is a 'Project Properties' section with the following details:

Project Properties	
License:	FictionSoft
Name:	Module1
Description:	
Created On:	5/8/2018 4:27 PM
Last Modified:	2/28/2019 1:51 PM
Source Project Storage Usage:	696.32 KB
Total Project Storage Usage:	8.53 MB
Total Targets:	1
Total Live Builds:	2
Total Builds:	3
Builds Storage Usage:	7.85 MB

A light blue callout box with a black border points to the right side of the interface, containing the text: 'After uploading (binding) a project to Flare Online, the window pane might look something like this.'

 **NOTE** If the Flare Online license is configured for single sign-on (SSO), you can log in through your company's identity provider. Otherwise, you would use the same password that you set in Flare Online. For details on setting up SSO, see the documentation for Flare Online.

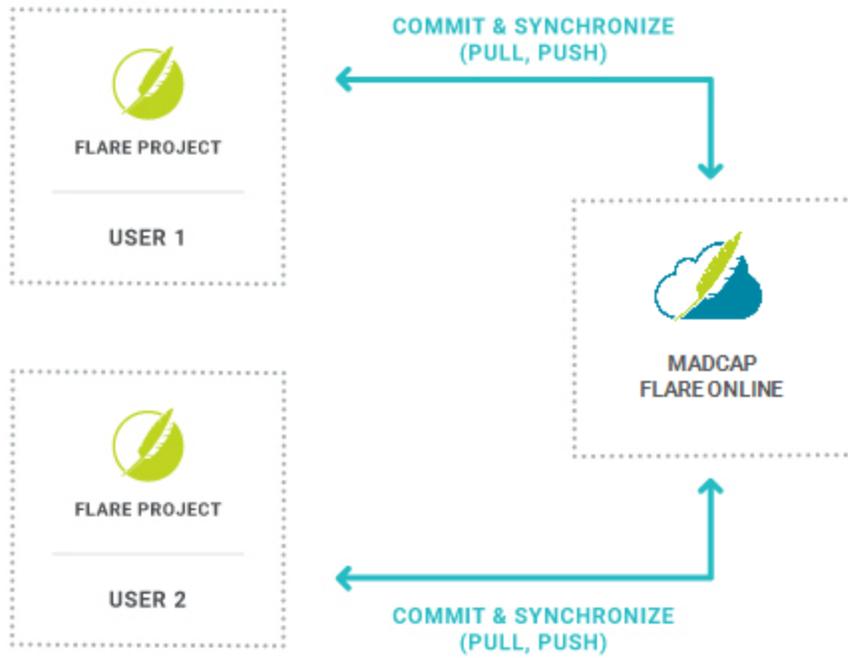
# I Source Control and MadCap Flare Online

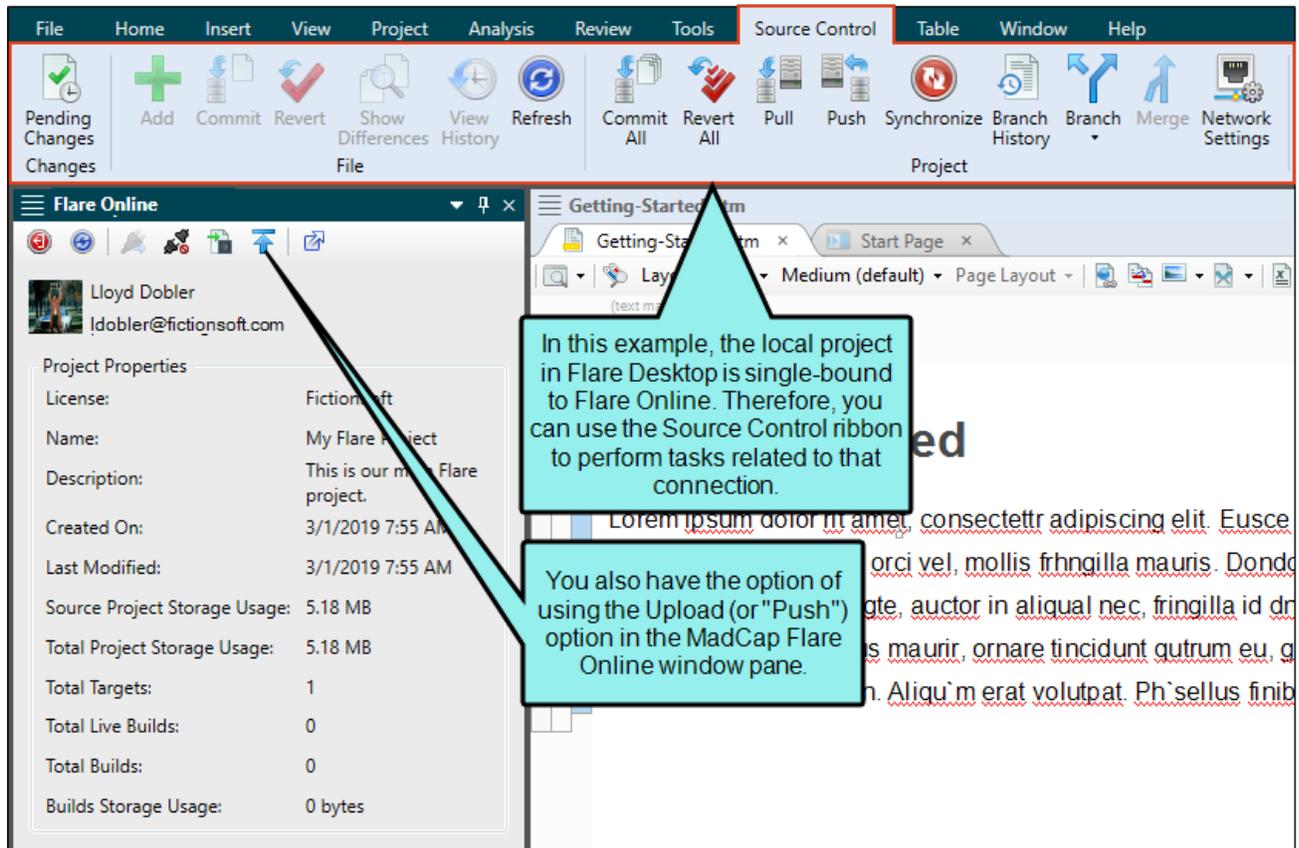
When you upload a project to Flare Online, the files are connected to Flare Online via an integrated source control system (Git). Your interaction with source control can follow one of two models—single-bound (recommended) or dual-bound.

## Single-Bound Projects

If your local project in Flare Desktop is not already bound to a third-party source control tool and you upload the project to Flare Online, you will have only one source control binding. Therefore, you can use the source control connection between your local project repository and the remote Flare Online repository as your primary source control solution. With this model, you can use the Source Control ribbon in Flare Desktop to perform regular source control tasks such as committing and synchronizing (i.e., pulling and pushing) files. However, you also have the option of using tools outside of Flare Desktop (e.g., Git Bash) to perform source control tasks (e.g., in case there are certain source control tasks not supported in the Flare Desktop interface that you need to complete).

## SINGLE-BOUND MODEL





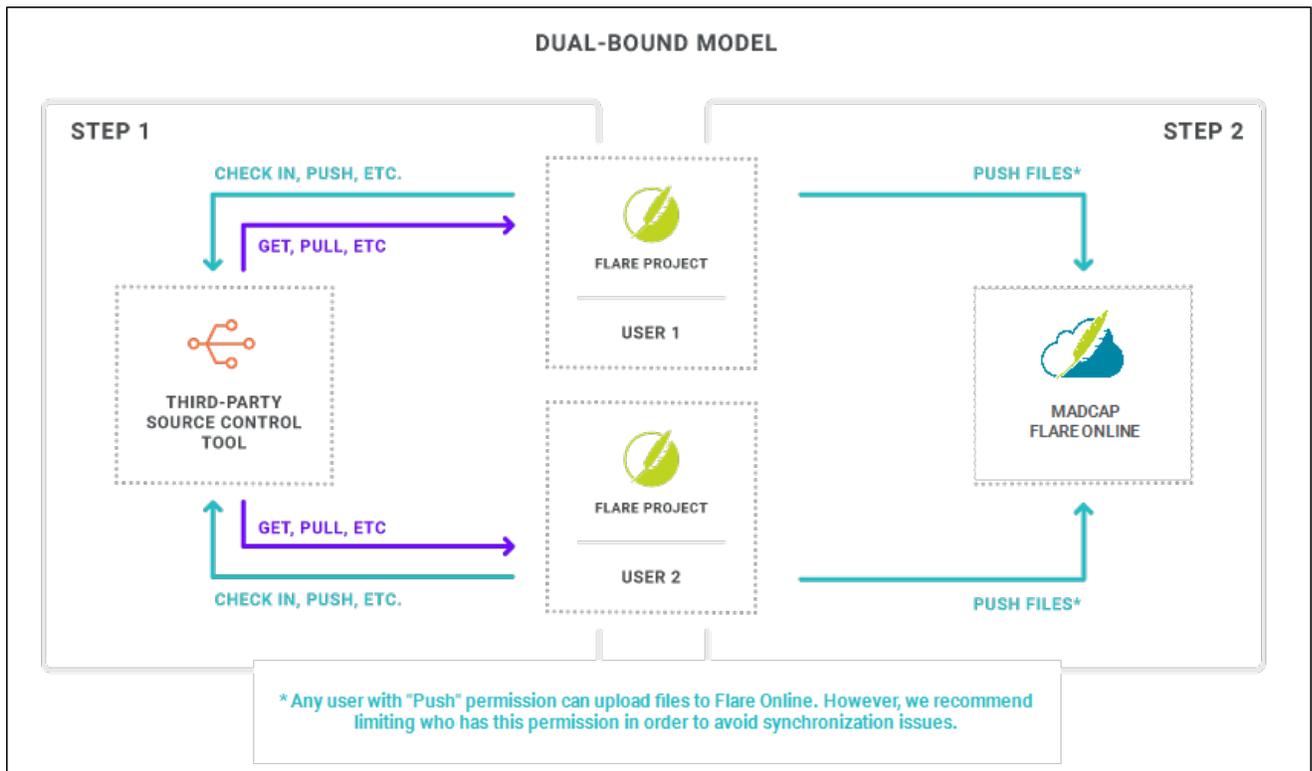
# How to Use Single-Binding

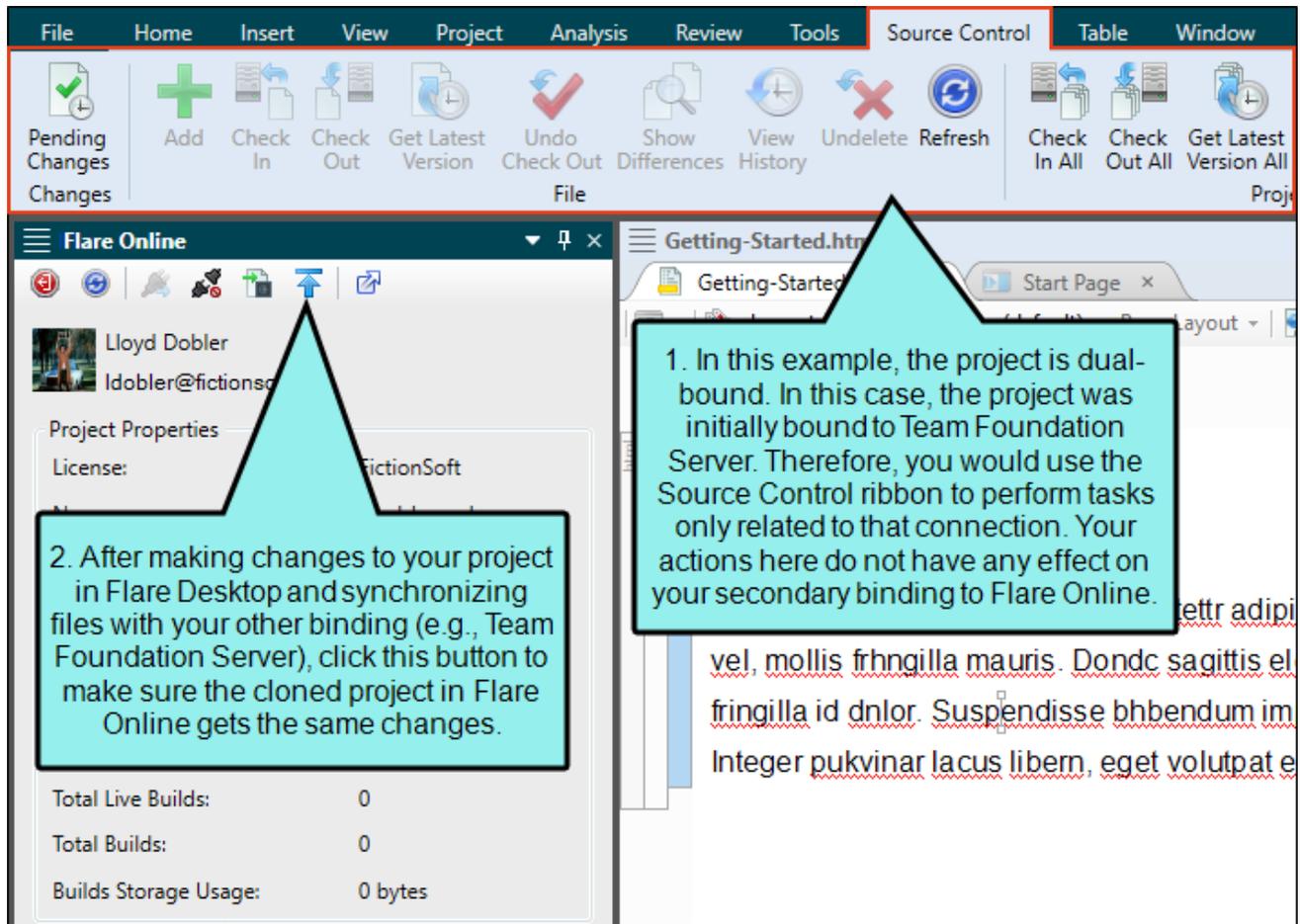
1. Open the project in MadCap Flare Desktop.
2. Select **View > Flare Online**. The Flare Online window pane opens.
3. Be sure to log in if you aren't already.
4. Upload (bind) your project to Flare Online. See "Binding a Project to MadCap Flare Online" on page 94.
5. In Flare Online, assign users to the new project and make sure they have "Import/Pull" and "Push" permissions. This enables users to import the project using the Flare Online window pane. It also allows users to push changes up to Flare Online. See the documentation for Flare Online.
6. Newly assigned users must now import the project from Flare Online using the Flare Online window pane in Flare Desktop. This allows each user to work on the project locally. See "Importing Projects From Flare Online" on page 99.
7. In Flare Desktop, make changes to your files. Then commit those files and synchronize them (i.e., pull, then push) with the cloned project in Flare Online. See "Committing and Synchronizing (Pull, Push) in a Single-Bound Model" on page 106.

# Dual-Bound Projects

A dual-bound project has a first binding to a third-party source control provider—such as Git, Perforce Helix Core, Subversion, or Team Foundation Server—and a second binding to Flare Online. Some might choose this model because it allows them to use a source control provider they're comfortable with, while also taking advantage of features in Flare Online.

However, if possible, it's recommended that you use the single-bound setup since it's simpler and more streamlined. With the dual-bound model, you use the first source control binding to do most of the version control work; the Source Control ribbon in Flare Desktop is used only for tasks related to the first binding. Then periodically, you will use the Flare Online window pane in Flare Desktop to upload (or “push”) the latest files from your local copy of the project up to Flare Online via the second binding; the Source Control ribbon in Flare Desktop is not used for the second binding. However, keep in mind that creating and synchronizing branches (other than master) between Flare Desktop and Flare Online is supported only with a single-bound project or with a Git-Flare Online dual-bound setup.





**NOTE** It is possible for multiple people working on a dual-bound project to push files to Flare Online. However, if you are using a source control provider other than Git for the first binding, the most recently pushed files are the ones that are used in Flare Online. In other words, the last person to push "wins." To avoid issues, be sure that you have the most recent version of file changes from all other writers in your local project before you push. You may even want to limit users' permissions (see the documentation for Flare Online) so only one or two people are allowed to push files to Flare Online.

 **NOTE** Your first source control binding (between Flare Desktop and a third-party provider) should be done from the Flare Desktop interface, rather than from another tool. Otherwise, Flare Desktop and Flare Online will not recognize that binding. If you already have a project that was bound using another tool, you have a couple of options:

- You can remove the binding and then bind again using Flare Desktop.
- You can create a new project, importing from source control. This method allows you to retain the repository.

 **NOTE** If you are using Git as your third-party source control tool for the first binding, the dual-bound model works slightly differently than it does if you are using another source control provider. In this situation, you will still use the Flare Online window pane and Source Control ribbon in Flare Desktop to manage your changes. However, you are able to pull and push files from and to *either* Flare Online or your Git repository. As a result, your Git repository and your Flare Online repository might be completely different, and you may encounter conflicts. In this situation, Flare Desktop's Conflict Resolution dialog will open and you can accept or reject the changes. It is recommended that you establish an internal workflow to dictate the order in which you pull and push from and to each repository to prevent conflicts and ensure that your files in Flare Online stay up-to-date. However, an even better solution is to use a single-bound setup instead of dual-binding.

# How to Use Dual-Binding—Perforce, Subversion, TFS, and Other Providers

1. Open the project in MadCap Flare Desktop, and make sure your project is already bound to a third-party source control provider.
2. Select **View > Flare Online**. The Flare Online window pane opens.
3. Be sure to log in if you aren't already.
4. Upload (bind) your project to Flare Online. See "Binding a Project to MadCap Flare Online" on page 94.

Because you are dual-bound, Flare Desktop will prompt you to check out your project file before you can upload the project.

5. Check in the project file to your third-party source control provider.
6. In Flare Online, assign users to the new project and make sure they have "Push" permissions. This gives the users the ability to push local content to the project in Flare Online.
7. Newly assigned users must now do one of the following, depending on whether or not they already have a copy of the project on their local machine:
  - **Have a Local Copy** Get the latest version of the project file from the third-party source control provider.
  - **Do Not Have a Local Copy** Import the project from the third-party source control provider using the Import Project from Source Control Wizard.

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

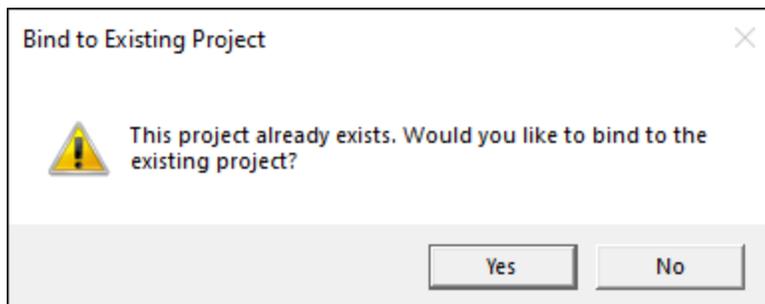
If you already have the project on your machine, you do not need to reimport the project from source control. Instead, you can get the latest version from source control by using the Flare Desktop Source Control ribbon.

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

Either option will give users the most current version of the project.

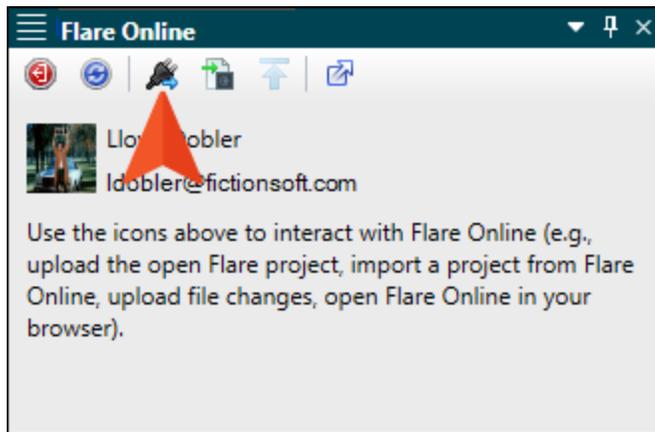
8. In Flare Desktop, make changes to your files. You should manage all of your file changes using your third-party source control provider, using the following actions:
  - **Check In** Check in your changes to source control.
  - **Get Latest** Get the latest version of your teammates' changes from source control and add them to your local project.
9. When you are done making changes, push your final changes to Flare Online. To do this, click  in the Flare Online window pane. See "Pushing in a Dual-Bound Model" on page 111.

 **NOTE** When a project is dual bound to Flare Online and a non-Git third-party provider, keep the following in mind if you (i.e., the second user) want to access this setup. After importing the project from Perforce Helix Core, Subversion, or Team Foundation Server, you will have to re-bind the project to Flare Online. In the MadCap Flare Online window pane in Flare Desktop, click to upload (or bind) the project to Flare Online. In the Bind Project dialog, it is important to enter the exact name of the project as it currently exists in Flare Online. When you click **OK**, a message displays asking if you want to bind to the existing project. Select **Yes**. This re-establishes the existing Flare Desktop-Flare Online connection; note that it does not create a new binding.

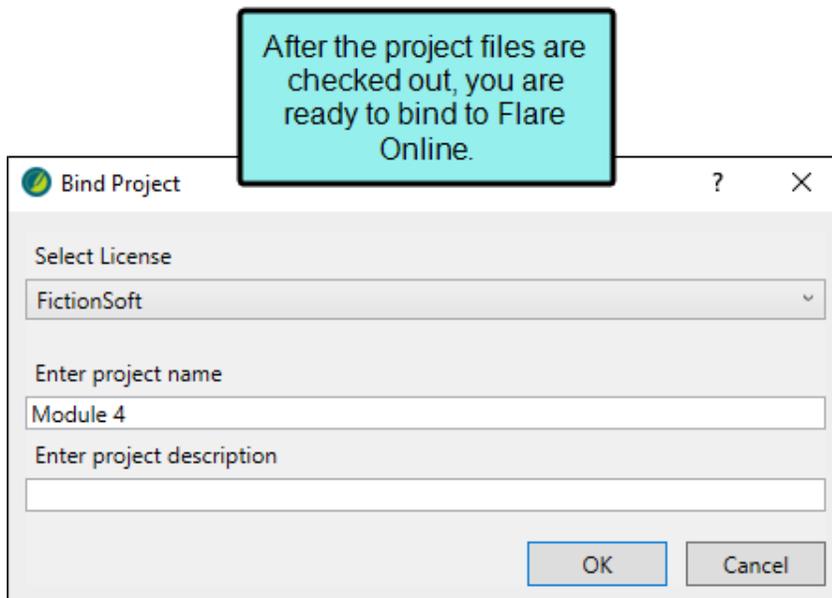
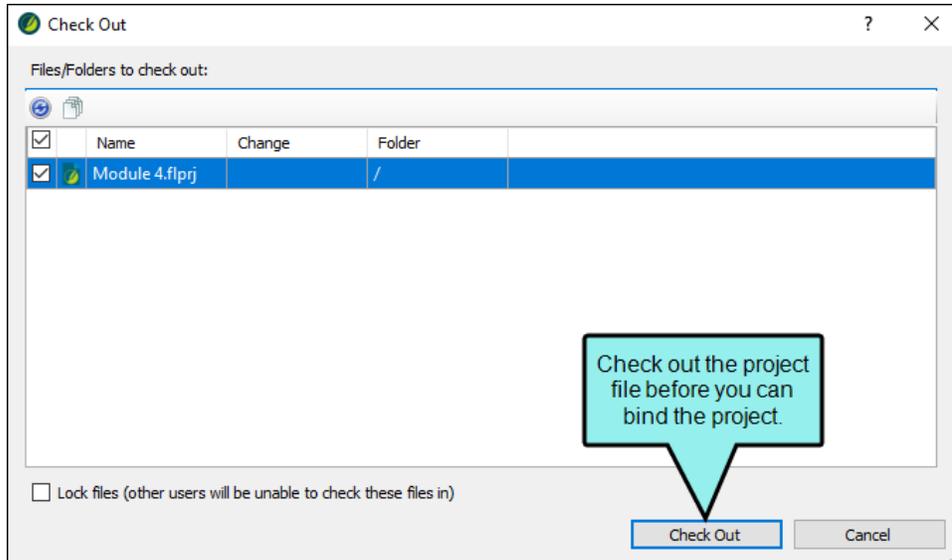


☆ **EXAMPLE** You are working on a team of writers and your project is bound to Microsoft Team Foundation Server (TFS). Therefore, that is your primary source control provider, and the source control connection between Flare Desktop and Flare Online serves as a secondary source control provider.

When you first start working with Flare Online, you have to upload (or bind) the project to Flare Online. To do this, click  in the Flare Online window pane.



- ☆ Because the project is bound to TFS, you will have to check out the project file before you can bind the project (Flare Desktop will prompt you to do this). Binding the project will establish the connection between Flare Desktop and Flare Online, and creates a copy of the project in Flare Online.





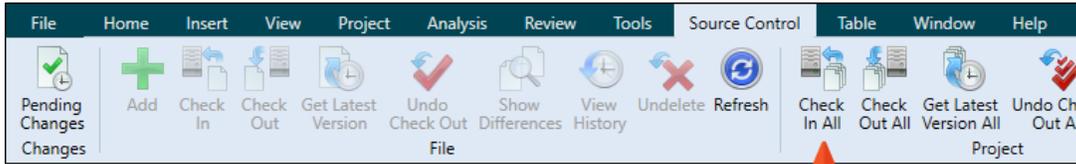
The screenshot shows a software interface with a teal header bar containing the text "All Projects" and several icons: a plus sign, a refresh symbol, a square with a plus, an envelope, a trash can, and a gear. Below the header is a table with columns for "Name", "Teams", and "Users". The "Name" column is sorted by ascending order, indicated by an upward arrow. A project entry is visible with a folder icon labeled "MOD" and the name "Module 1". A user profile picture is shown in the "Users" column. Two callout boxes are present: one pointing to the project name with the text "The project appears in Flare Online." and another pointing to the user profile with the text "The user who uploaded the project is automatically added to it."

	Name ↑	Teams	Users
	MOD Module 1		

The project appears in Flare Online.

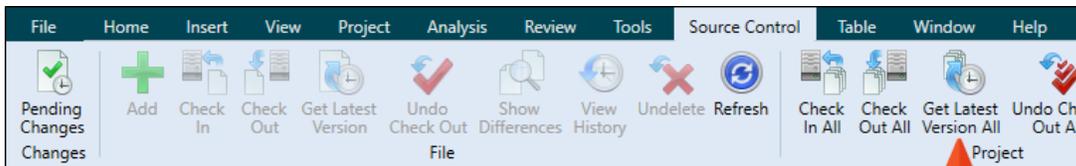
The user who uploaded the project is automatically added to it.

☆ Click **Check In All** in the Flare Desktop Source Control ribbon.

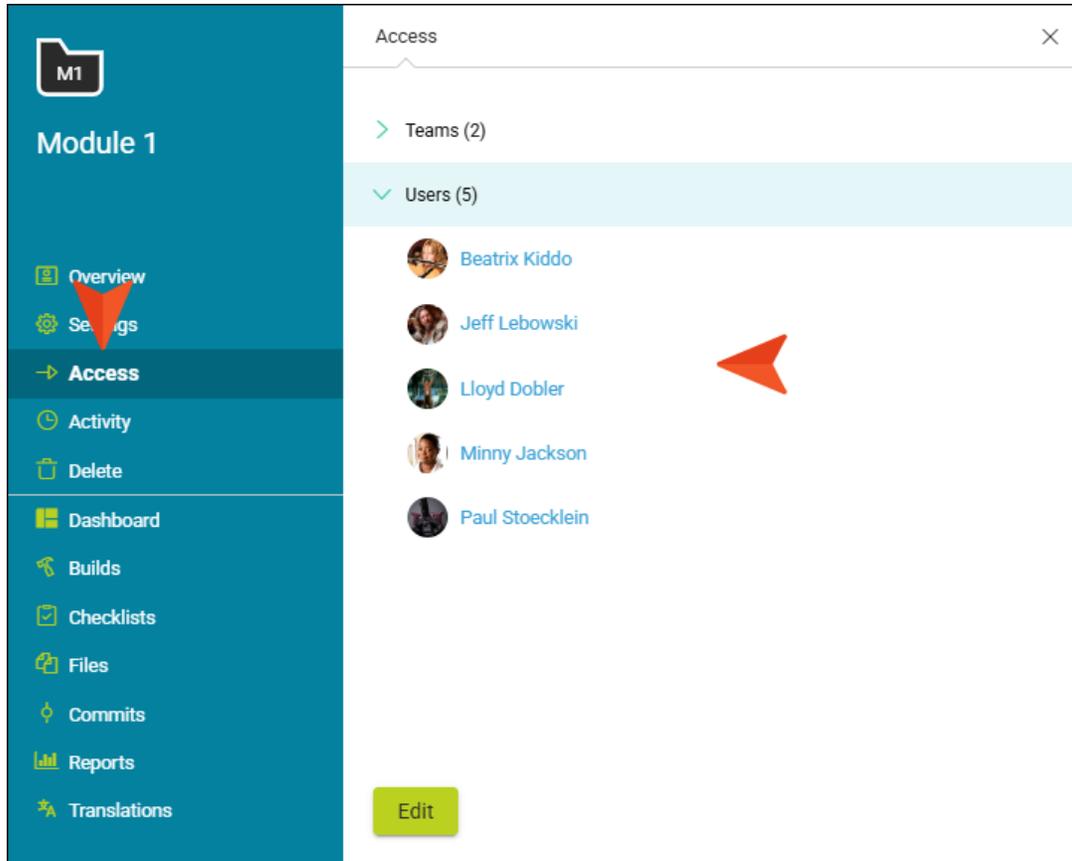


If any writers on the team do not already have a local copy of the project, they should import the project from TFS so they can work on the project locally (they cannot import from Flare Online because the project's primary source control location is TFS). To import the project, they will use the Import Project From Source Control Wizard.

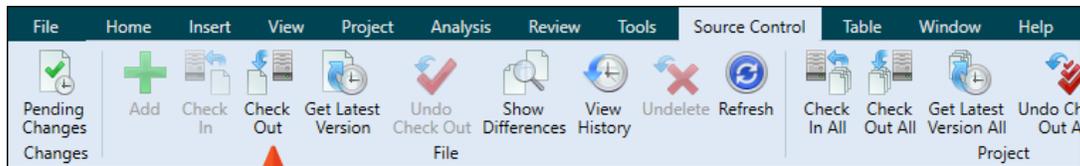
Writers on your team who already have the project locally do not need to reimport. They simply need to get the latest version of the project by clicking **Get Latest All** in the Flare Desktop Source Control ribbon.



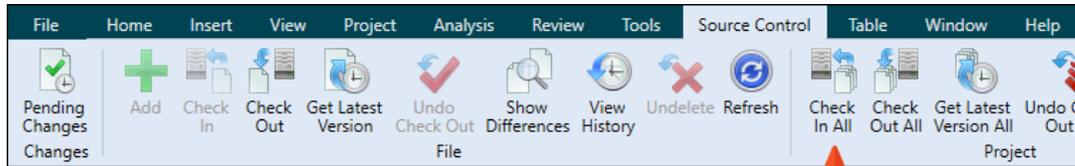
Now that everyone has the updated project file, you can all work on the project and make changes using TFS. However, a user with the "Manage Teams/Projects" permission also needs to assign your teammates to the project in Flare Online (see the documentation for Flare Online).



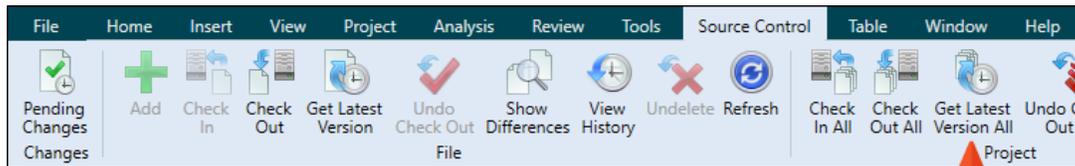
As you work on files in Flare Desktop, you should check out your files using Flare Desktop's **Check Out** feature on the Flare Desktop Source Control ribbon (or using automatic checkouts, if you have this enabled).



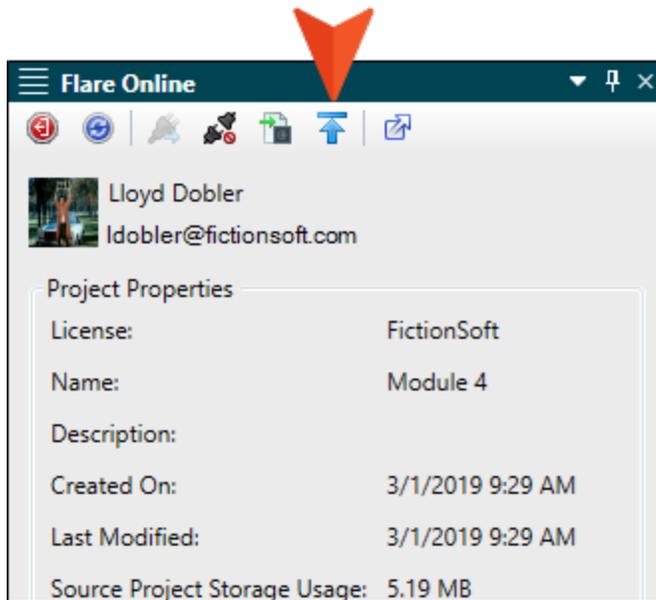
- ☆ After you are finished making changes, you should check in your changes to TFS. You can do this by clicking **Check In All** on the Flare Desktop Source Control ribbon. This will upload your changes to TFS.



Once your changes are checked in, you should make sure that you have the latest version of your teammates' files, as well. To do this, click **Get Latest Version All** on the Flare Desktop Source Control ribbon. This will download the latest changes of all of the files to your local version of the project.



- ☆ When you and your teammates are finished making changes, you need to synchronize your local copy of the project with the copy of the project in Flare Online. To do this, click  in the Flare Online window pane.



This will push your local changes up to Flare Online. It is important to remember that the last person who pushes their changes to Flare Online wins, so be sure that everyone has the latest version of the project files before you push (or even limit some users' permissions so they are not able to push; see the documentation for Flare Online) so you do not have out-of-date files in Flare Online.

Once your files are up in Flare Online, you can publish output and manage your project.

# How to Use Dual-Binding—Git

1. Open the project in MadCap Flare Desktop.
2. Be sure your project is already bound to Git.
3. Make sure all changes are committed before binding to Flare Online.
4. Select **View > Flare Online**. The Flare Online window pane opens.
5. Be sure to log in if you aren't already.
6. Upload (bind) your project to Flare Online. See "Binding a Project to MadCap Flare Online" on page 94.
7. Push the project file to Git.
8. In Flare Online, assign users to the new project and make sure they have "Push" permissions. This gives the users the ability to push local content to the project in Flare Online.
9. Newly assigned users must now do one of the following, depending on whether or not they already have a copy of the project on their local machine:
  - **Have a Local Copy** Pull the latest version of the project file from Git.
  - **Do Not Have a Local Copy** Import the project from Git using the Import Project from Source Control Wizard.

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

Either option will give users the most current version of the project.

10. In Flare Desktop, make changes to your files. When working in a Git-Flare Online dual-bound situation, you can make changes to both Flare Online and Git, using the following actions:

- **Pull** Pull your teammates' changes from Git and add them to your local project.
- **Push** Push your changes to source control.

 **NOTE** It does not matter which location (i.e., Git or Flare Online) you push to or pull from first, as long as you push the files to both Git and Flare Online and that everyone on your team uses the same workflow.

11. (Optional) If the changes in Git or Flare Online become out-of-sync with each other (i.e., changes are made in one location but not the other), the Resolve Conflicts dialog opens. If this happens, use the dialog to accept or reject other users' changes.
12. When you are done making changes, push your final changes to Flare Online. To do this, click  in the Flare Online window pane. See "Pushing in a Dual-Bound Model" on page 111.

 **IMPORTANT** There are several different workflows you can use when working with a Git-Flare Online dual-binding. The steps above are only one example of how you might perform this process. Because of the potential for file conflicts, it is essential that you establish a workflow for using a Git-Flare Online dual-binding, and make sure that all your team members follow the same steps.

# What's Noteworthy?

 **NOTE** If you are using a dual-bound setup where you are bound to MadCap Flare Online and a third-party provider, you might decide at some point to move to a single-bound configuration, removing one of the bindings but leaving the other.

 **NOTE** If your team is using Git branching, you can create branches in Flare Desktop and push them up to Flare Online. Other writers on your team who need to work in the same branches can pull them down from Flare Online.

 **NOTE** If you are using a Git-Flare Online dual-binding, and you encounter conflicts in one repository (i.e., Git or Flare Online), you will likely encounter them in the other location as well. Conflicts in one repository will most likely need to be resolved in the other repository. See the Help system.

# I Moving From Dual-Bound to Single-Bound

If you have been using a dual-bound setup for source control, you might find that you want to change to a single-bound project. One reason you might decide to do this is branching, which previously was not available in MadCap Flare Online, but is now supported for Git.

The steps for moving from a Git-Flare Online dual-bound setup to a single-bound setup are slightly different than those for other provider configurations (i.e., Perforce Helix Core, Subversion, Team Foundation Server). Keep in mind that if you are using a branching solution with a non-Git providers, those branches are still not be supported in Flare Online. You can only push branches to Flare Online if you have a single-bound setup or a Git-Flare Online dual-bound setup.

## How to Move From Dual-Bound to Single-Bound for a Git-Flare Online Setup

If your first binding is to Git and your second is to Flare Online, complete the following steps locally in Flare Desktop.

1. Each author on the team should commit all outstanding changes and synchronize each local branch with the corresponding remote branch.
2. It's possible, or even likely, that not all writers on the team have all of the remote branches locally, and they don't necessarily need to. But between all of the team members, all of the remote branches that you want to keep should be pulled down to someone's local repository by selecting the remote branches and switching to them via Flare Desktop's Branch Management dialog. In fact, just one person on the team could do that. Then, once the first binding is removed using the steps below, the local branches can be published (i.e., pushed) to the remote Flare Online repository.

3. Each author on the team should then complete the following steps:

a. Select **Project > Project Properties**.

You can also remove the first binding by using the Settings view of the Source Control Explorer.

b. Select the **Source Control** tab.

c. Next to the **Remotes** field, click .

d. Select the **origin** row (which represents your first binding) and click **Remove**. This leaves just the Flare Online binding.

e. Click **OK**.

f. In the Project Properties dialog, click **OK**.



**NOTE** Your Git commit history will be retained when you move from a dual-bound configuration to a single-bound setup. That's because the history is recorded in your local Git repository where your project exists. Removing the first binding will have no effect on the commit history.

# How to Move From Dual-Bound to Single-Bound for Non-Git Providers

If your first binding is to a non-Git provider (Perforce Helix Core, Subversion, Team Foundation Server), complete the following steps in your project.

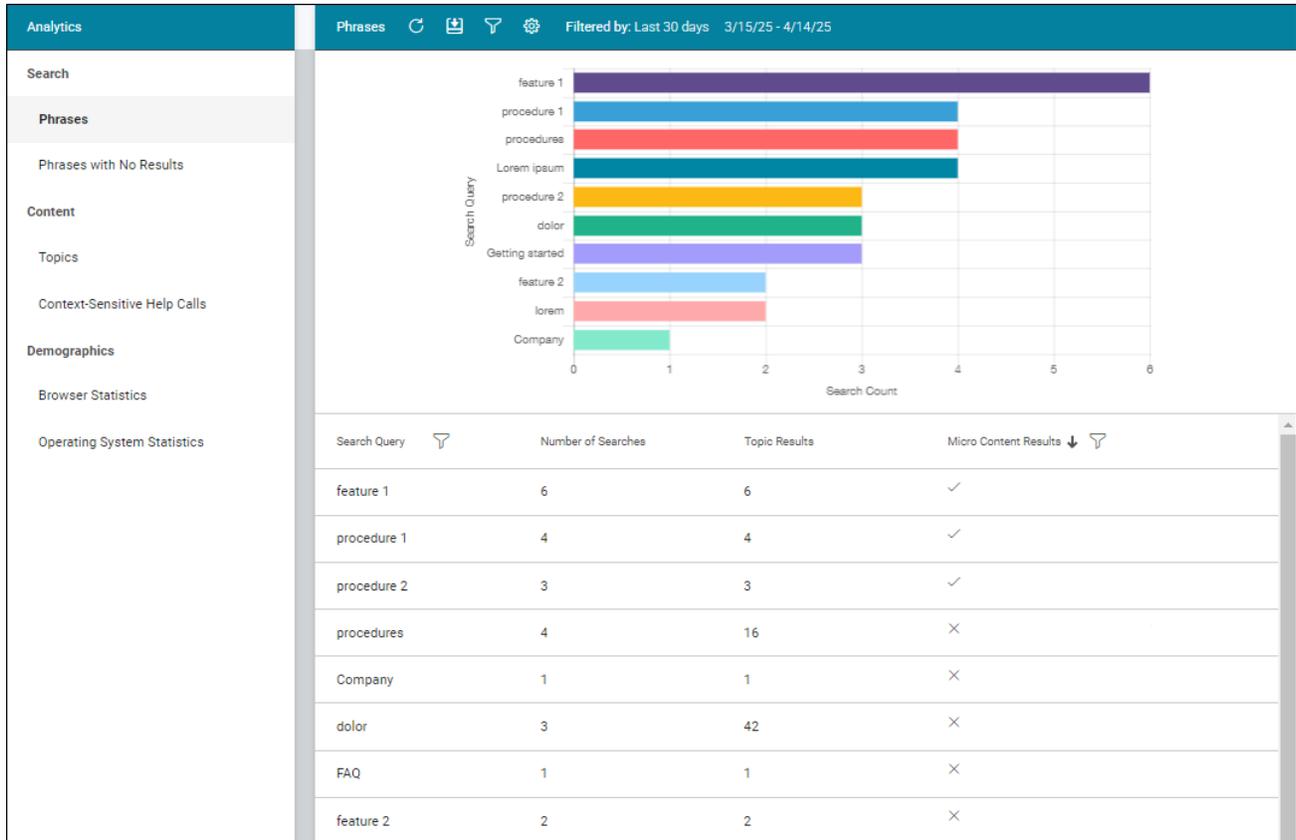
1. Each author on the team should commit all outstanding changes and synchronize.

 **NOTE** Since Flare Online does not support branches or streams from non-Git providers, keep in mind that you will not be able to move those up to Flare Online. However, you could begin creating new branches in Flare Desktop and pushing those up to Flare Online.

2. Each author on the team should then complete the following steps:
  - a. Select **Project > Project Properties**.
  - b. Select the **Source Control** tab.
  - c. In the section showing your first binding, click **Unbind Provider**. (The second binding to Flare Online is shown in a separate section; leave that binding alone.)
  - d. Click **OK**.
  - e. In the Project Properties dialog, click **OK**.

# Flare Online Analytics

If you have a MadCap Flare Online license, you can view analytics on published HTML5 output. This includes search phrases used, search phrases with no results, topics viewed, context-sensitive Help calls, and demographic statistics (browsers and operating systems).



## General Information

- "Types of Analytics Information" on the next page
- "Host Output Anywhere" on page 44

## Main Activities

- "Creating and Editing Analytics Keys" on page 114
- "Associating Analytics Keys With Targets" on page 115
- "Managing Analytics Keys" on page 116
- "Downloading Analytics" on page 117



**NOTE** If the project *is not bound to Flare Online*, you can view the analytics information on any Flare Online license where you are using the analytics key. However, if the project *is bound to Flare Online*, you can view its analytics only on the Flare Online license where the project is uploaded.

## Permission Required?

To create and manage keys, you must have the following permission setting in Flare Online:

**Manage Output Analytics Keys**

However, all users on the license can view analytics data, regardless of their permission settings.

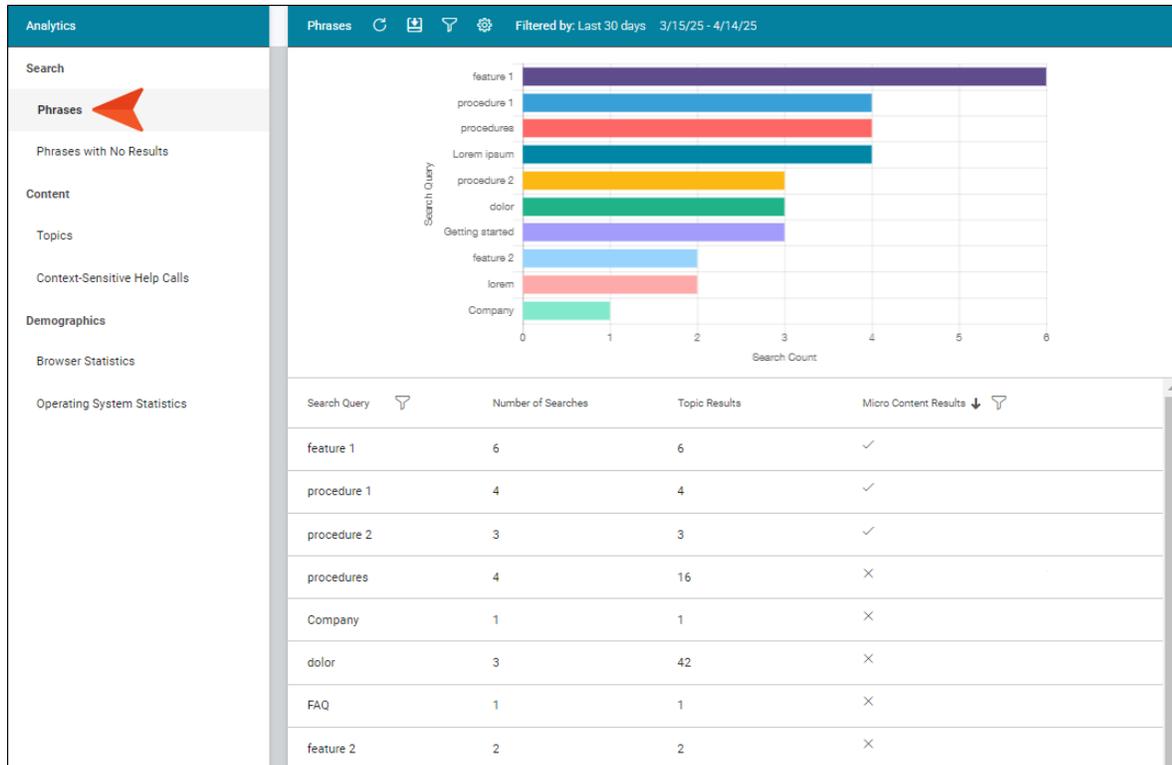
For more information about permissions, see the documentation for Flare Online.

# Types of Analytics Information

By using Flare Online Analytics, you can obtain various types of information about your output.

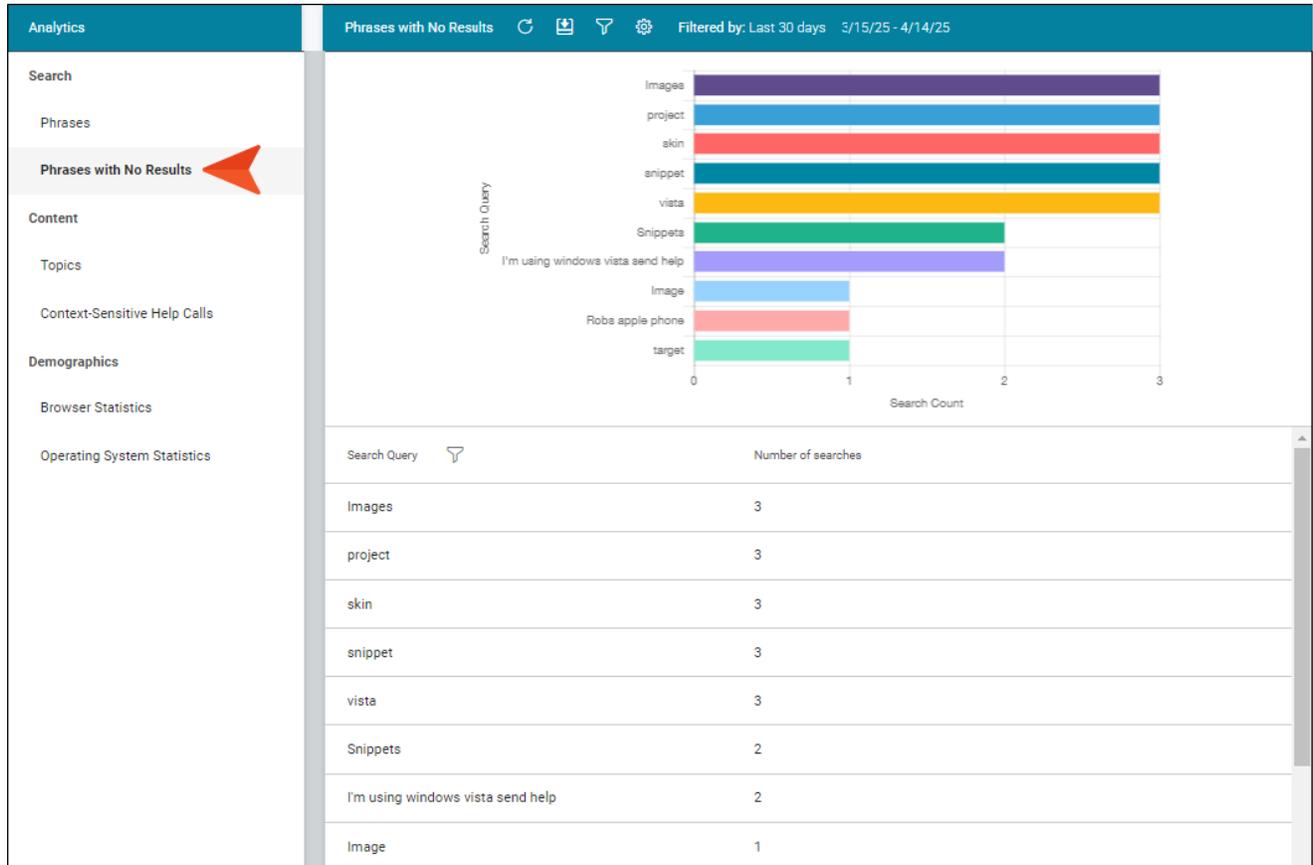
## Phrases

Shows all search queries made to the output, including whether a search term returned any micro content results. *This is useful because it indicates the kind of documentation most often sought by users, as well as whether you should create new micro content to match certain search terms.*



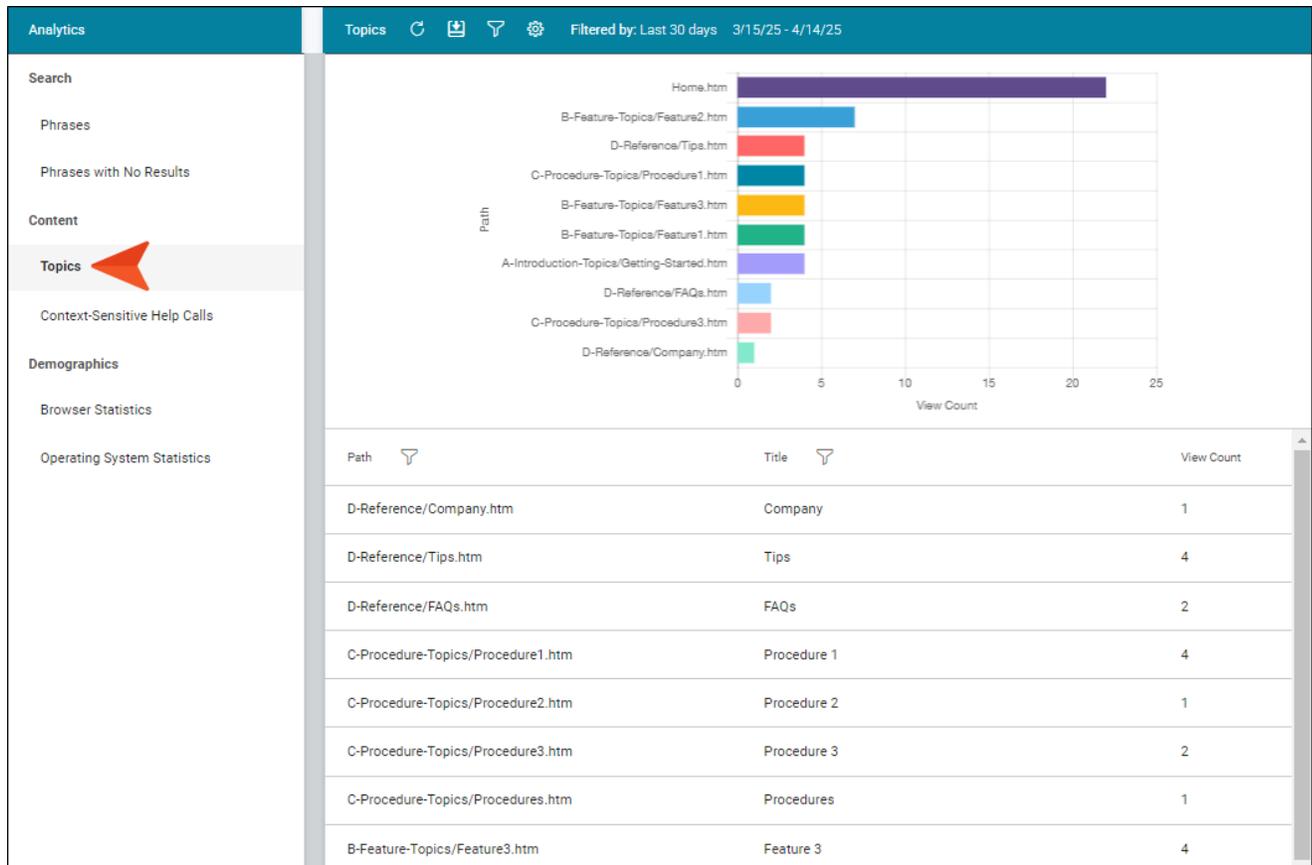
# Phrases With No Results

Shows all search phrases that didn't produce any results. *This is useful because it indicates if you need to produce new documentation to provide results for users, or perhaps create synonyms that will show results for existing documentation.*



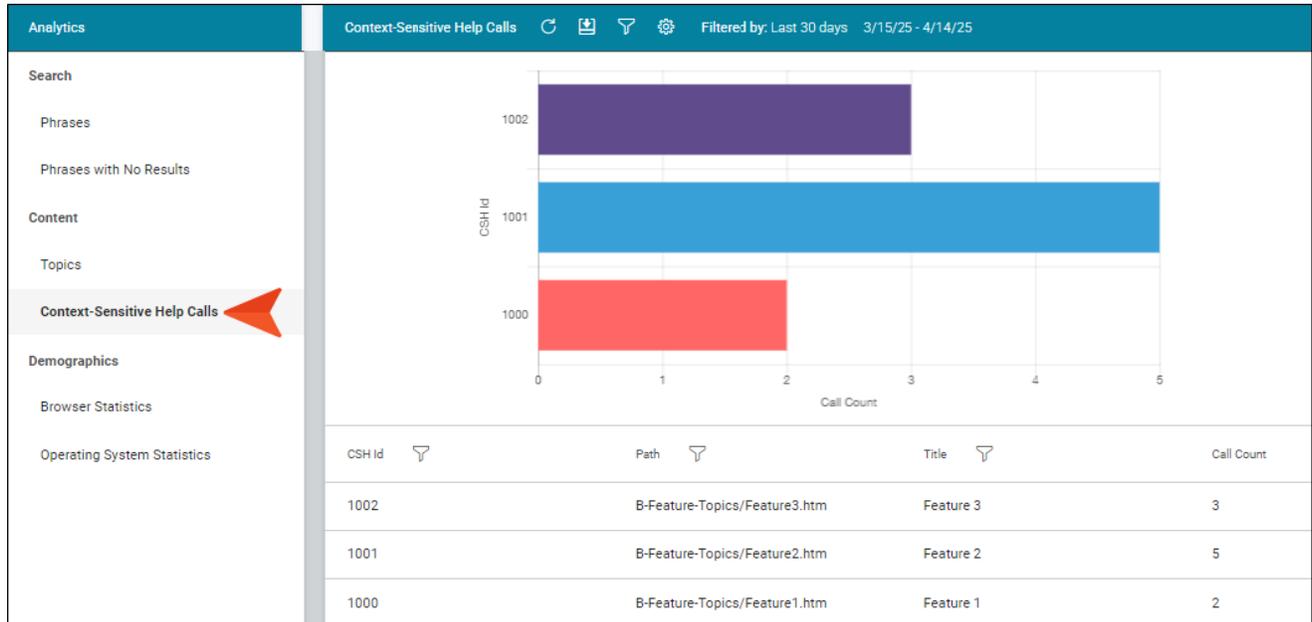
# Topics

Shows all topics in the output that have been viewed at least once. *This is useful because it indicates the topics where you might want to focus much of your attention.*



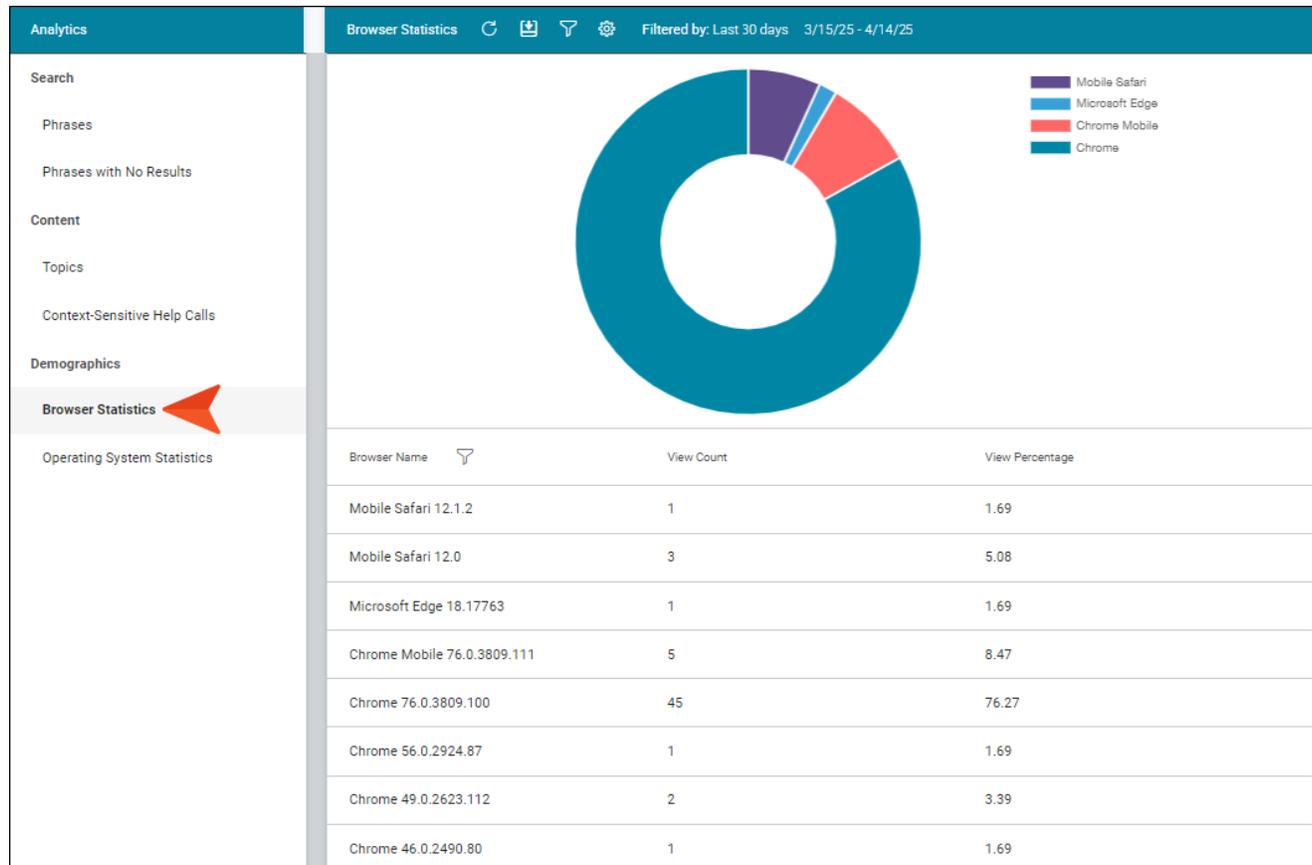
# Context-Sensitive Help Calls

Shows context-sensitive Help identifiers that have been invoked at least once in the output. *This is useful because it indicates which areas of your product's interface are most active, and perhaps even unclear to users.*



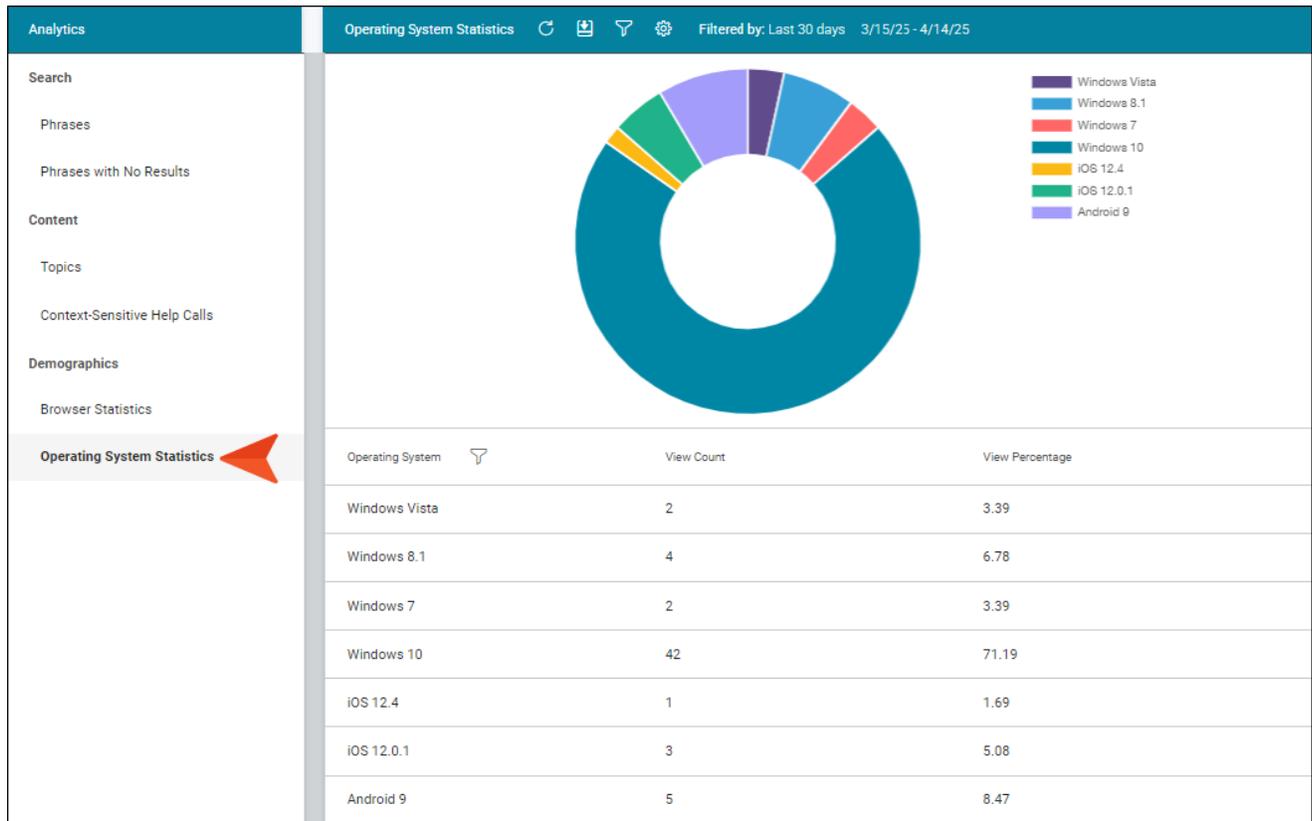
# Browser Statistics

Shows which browsers are being used to view your online output. The graph shows a broad view of the browsers, and the grid breaks down the information into specific browser versions. *This is useful because it indicates which browsers you should focus on supporting.*



# Operating System Statistics

Shows which operating systems are being used to view your online output. *This is useful because it indicates which operating systems you should focus on supporting. It might even be used to determine whether your company's software needs to continue supporting certain operating systems.*



**NOTE** The graph at the top is limited to the first 10 items. The grid below shows all items.

**NOTE** For more information about using the Analytics page—including downloading and filtering data—see the documentation for Flare Online.

# Host Output Anywhere

Analytics works on projects located in Flare Online, or you can host output on your own servers. If you host the output outside of Flare Online, you still need to use Flare Online with a key to view the analytics data. Also, the server where the output is hosted must be able to communicate with Flare Online (e.g., not be behind a firewall).

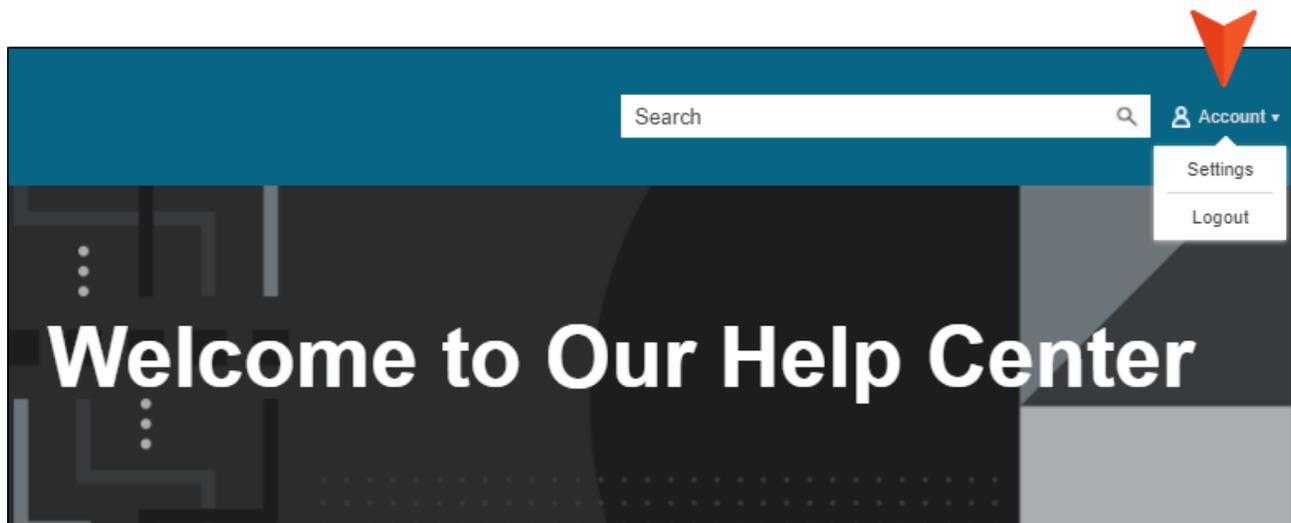
# Private Outputs in MadCap Flare Online

Supported In:



You can produce private output that requires a user to log in with an email and Flare Online password. Without credentials, people cannot see the output. It is possible to set private output for all output types supported by Flare Online. Also, accessing private output is not limited to people in your company. Flare Online has a free viewer user type that you can use to add any of your customers to your Flare Online license, and then give them access to live private output.

After users log in to see private output, an account link displays in the output interface for HTML5 targets (not for other output types). If the output is not set to private, this link is not shown. When users hover over the link, a menu shows two options.



For more details about making output private, see the documentation for Flare Online.

# How to Customize the Location of the Account Link

By default, the account link is included automatically in the header of the regular skin. However, if you want the account link to display somewhere else in the output, you can use a Flare Account proxy and hide the link from the regular skin.

 **NOTE** You cannot use a proxy and skin component to customize the account link location for Tripane output. It is supported only for Side Navigation, Top Navigation, and skinless output.

1. (Optional) Add a Central Account skin component if you want to control the look of the account link in the output.

 **NOTE** Some elements in Flare Desktop reference the old "Central" name, even though it has since been renamed to Flare Online.

2. Open a topic (if you want the link to display on only one page) or template page (if you want the link to display on many pages).
3. In the topic or template page, place your cursor where you want the account link to be added. In a template page you may need to press the down arrow on your keyboard and then press **ENTER** at the correct location. Then select **Insert > Proxy > Insert Flare Online Account Proxy**.
4. (Optional) In the dialog, you can select a skin component to affect the look of the account link.
5. Click **OK**.
6. Click  to save your work.
7. If you inserted the proxy into a template page, make sure to associate the template page with a target.
8. Open the regular HTML5 skin, and set the account link to be hidden from the top of the output.
  - a. In the local toolbar, make sure **Web Medium** is selected.
  - b. On the left, select the **Styles** tab.
  - c. In the style group section, expand **Header > Flare Online Account**, and select **Element**.

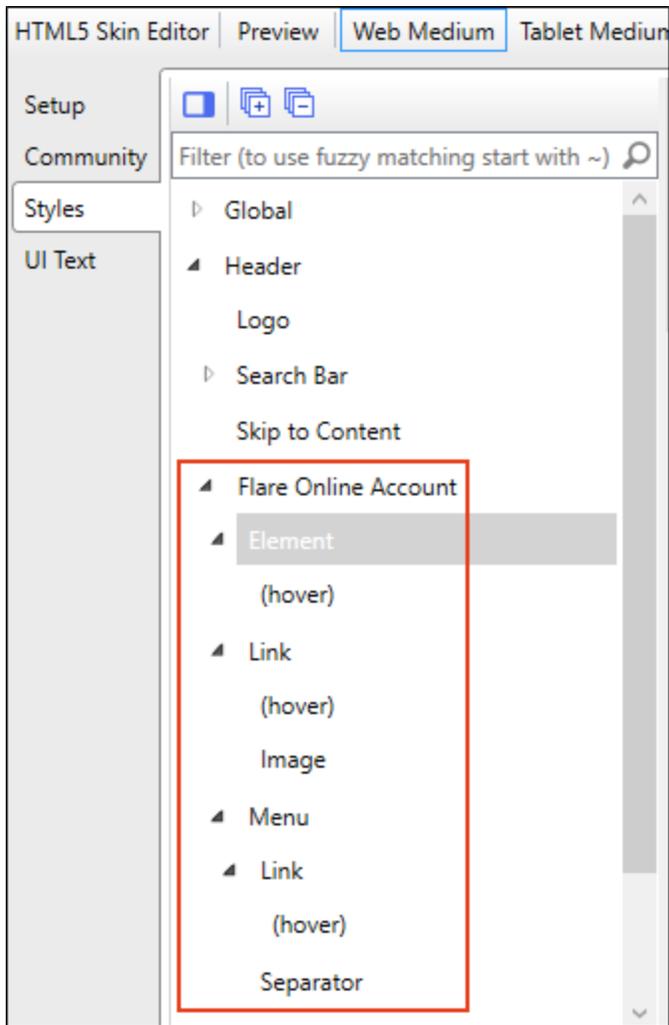
- d. In the properties section, expand **Layout**, and set the **Display** field to **none**.
- e. Click  to save your work.

## How to Change the Look of the Account Link

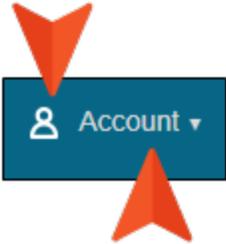
1. Open a regular HTML5 skin, or a Central Account skin component if you are using a proxy.

 **NOTE** Some elements in Flare Desktop reference the old "Central" name, even though it has since been renamed to Flare Online.

2. In the local toolbar, select the appropriate medium—**Web**, **Tablet**, or **Mobile**.
3. Select the **Styles** tab.
4. If you opened a regular skin, in the style group section, expand **Header > Flare Online Account**.



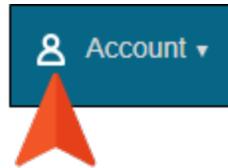
Then click any of the styles.

Style	Description
Header > Flare Online Account > Element	This controls the look of the entire account link area. 
Header > Flare Online Account > Element > (hover)	This controls the look of the entire account link area when a user hovers over it.
Header > Flare Online Account > Link	This controls the look of the area showing the image, text, and down arrow that the user first sees. 
Header > Flare Online Account > Link > (hover)	This controls the look of the area showing the image, text, and down arrow when a user hovers over it.

Style	Description
-------	-------------

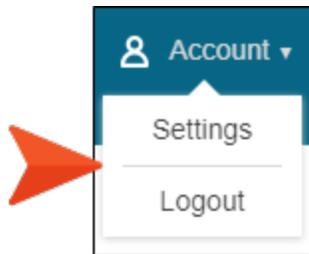
Header > Flare  
Online Account  
> Link > Image

This controls the image shown to the left of the word "Account."



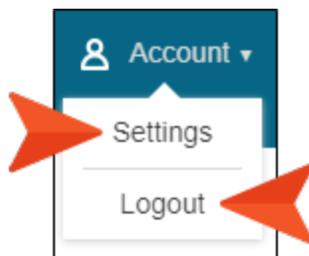
Header > Flare  
Online Account  
> Menu

This controls the look of the entire menu area. If you click this area in the preview to display the drop-down options, the popup will continue to display until you click again. This means you can continue to view the options while you make adjustments to the styles, allowing you to see your changes immediately.



Header > Flare  
Online Account  
> Menu > Link

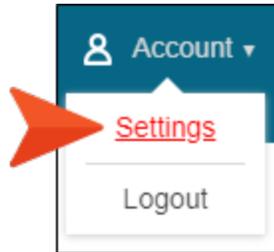
This controls the look of the link for individual menu items.



Style	Description
-------	-------------

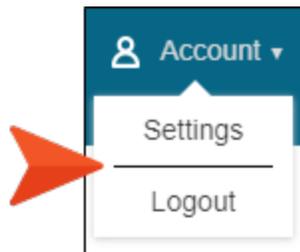
Header > Flare  
 Online Account  
 > Menu > Link  
 > (hover)

This controls the look of the link for individual menu items when a user hovers over them.

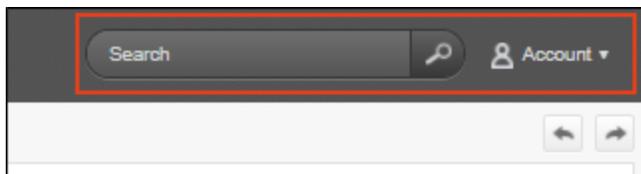
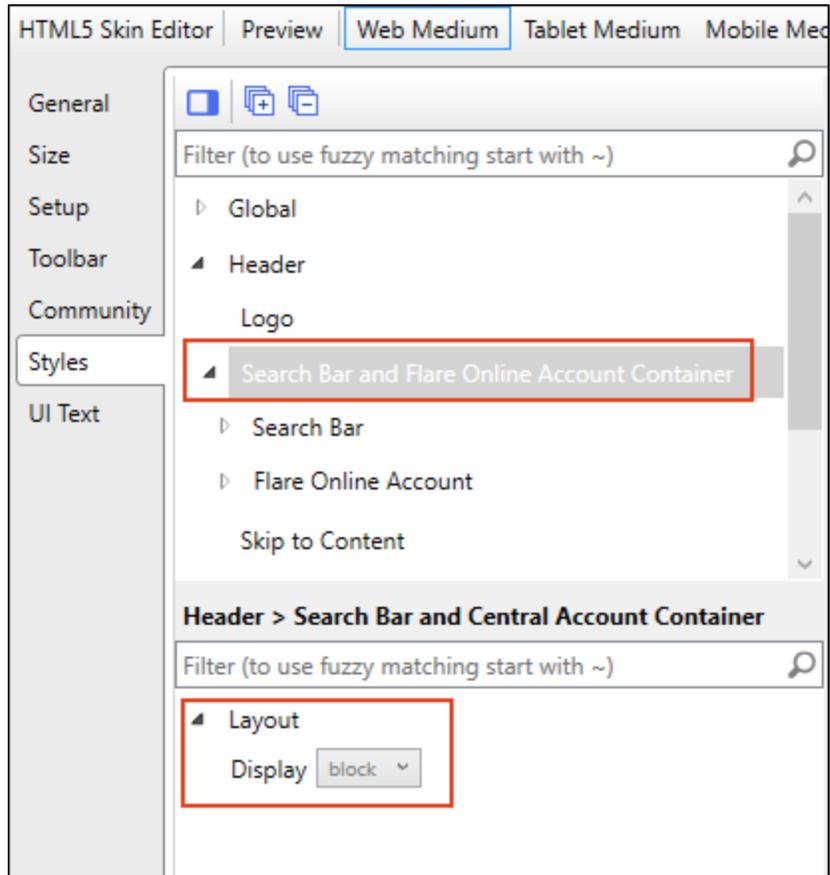


Header > Flare  
 Online Account  
 > Menu >  
 Separator

This controls the look of area that separates menu items.



For Tripane skins there is an additional style called "Search Bar and Flare Online Account Container." This style lets you hide or show the container holding the search bar and Flare Online account link.



5. Expand any of the nodes and complete the necessary fields. The properties and fields that you see are different for each node. Also, you might see nodes in the full skin that you do not see in a skin component, and vice versa. Following is a general list in alphabetical order:

## ABSOLUTE POSITION

For certain styles, this can allow you to be more precise with the position of an element. This might be necessary to prevent the element from disappearing from the screen. In addition to entering values with specific units of measurement (e.g., pixels), you can enter **auto** in a field. You might do this, for example, if you want the left or right property to have a particular value, but leave the other property to be adjusted automatically.

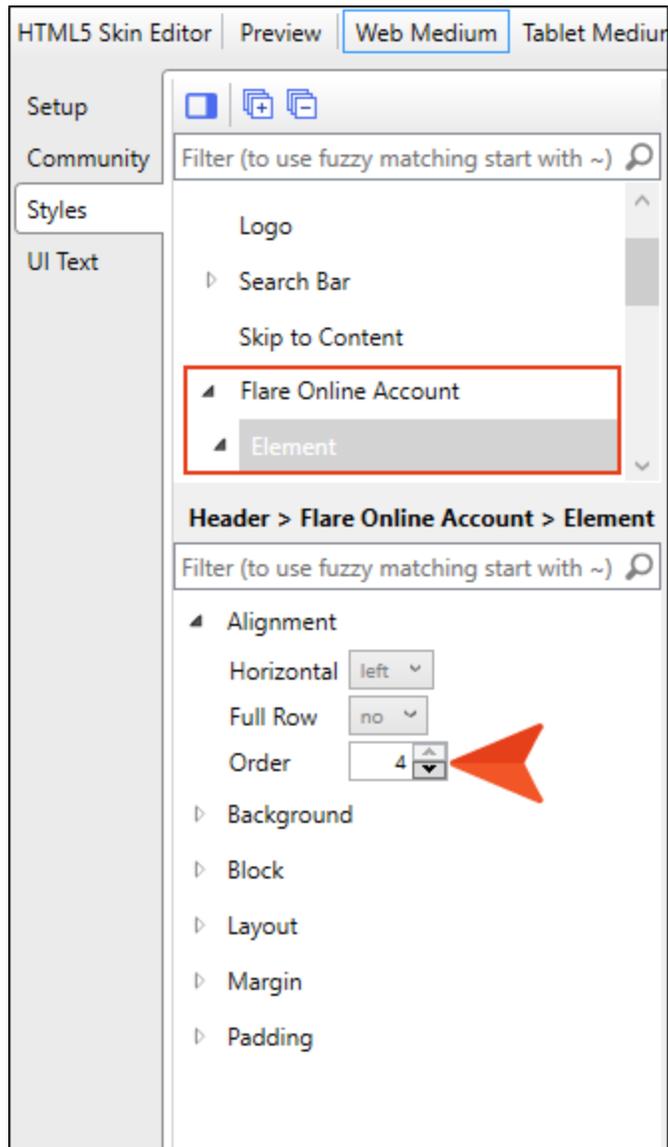
## ALIGNMENT

Depending on the style and element you are working with, you may be able to select one or more of the following:

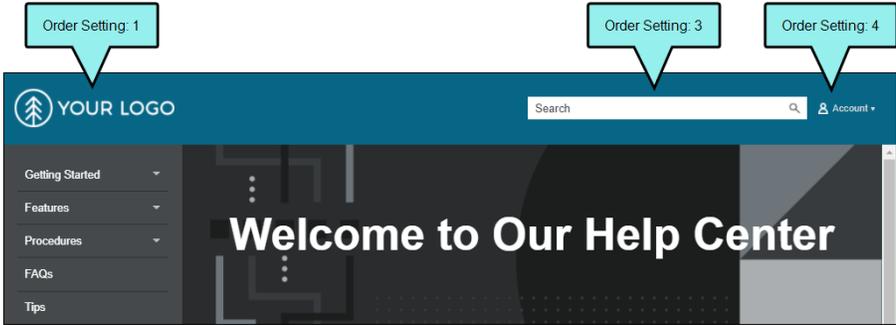
- **Horizontal** This option lets you choose whether to position the element to the **left**, **middle**, or **right**.
- **Vertical** This option lets you choose whether to position the element on the **top**, **middle**, or **bottom**.
- **Full Row** This option allows the element to take up all of the space horizontally in the header.
- **Order** This option determines which element comes first (**1**), second (**2**), third (**3**), or fourth (**4**) in the header. Side Navigation has three elements (logo, search bar, and Flare Online account link), but Top Navigation has four (logo, search bar, menu, and Flare Online account link).

☆ EXAMPLE

If you have a Side Navigation skin, the Flare Online Account Element is set to have an order value of 4. This means it appears to the right of both the logo and the search bar, which have lower values for that option (the logo is set at 1, and the search bar is set at 3).



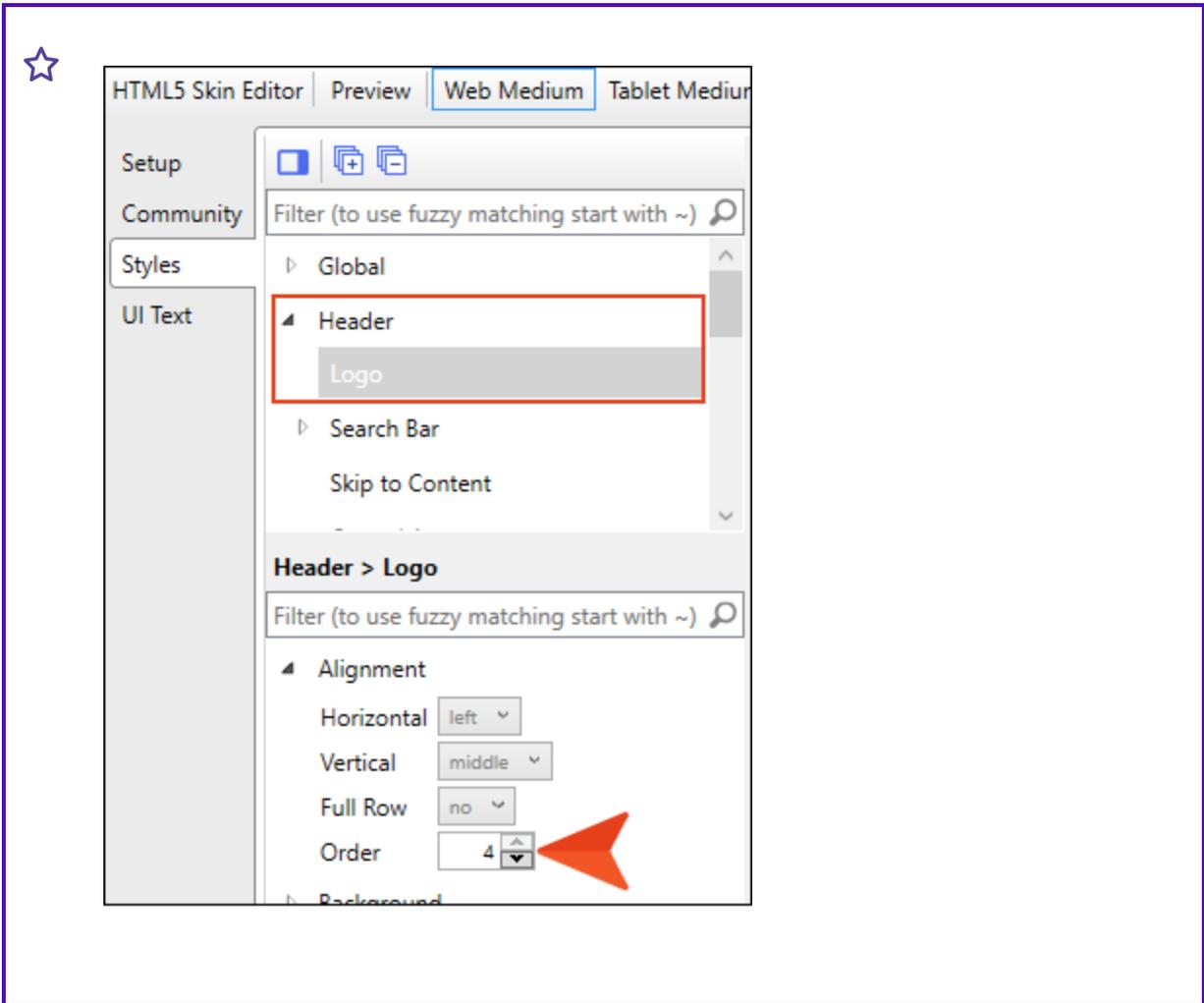
☆

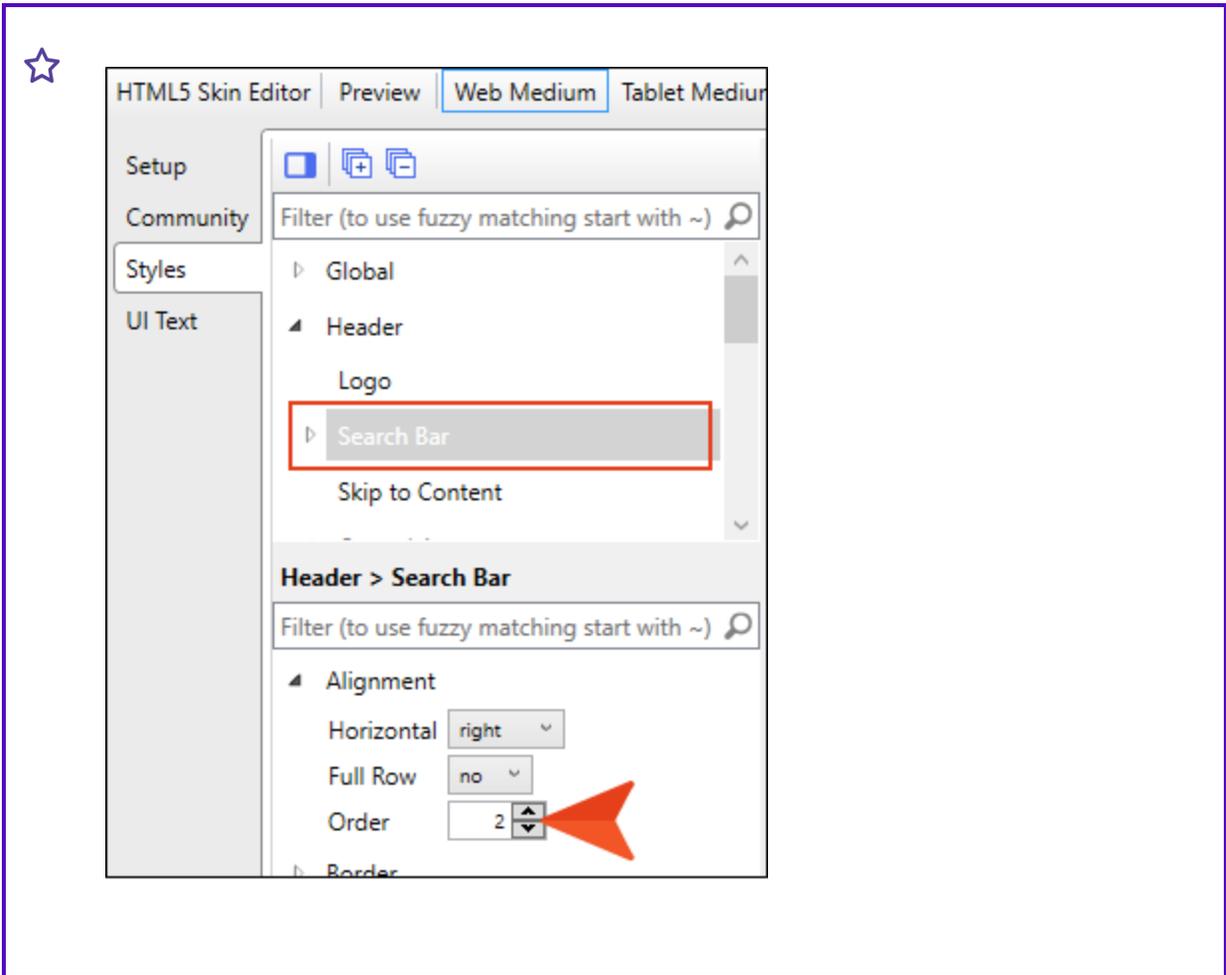


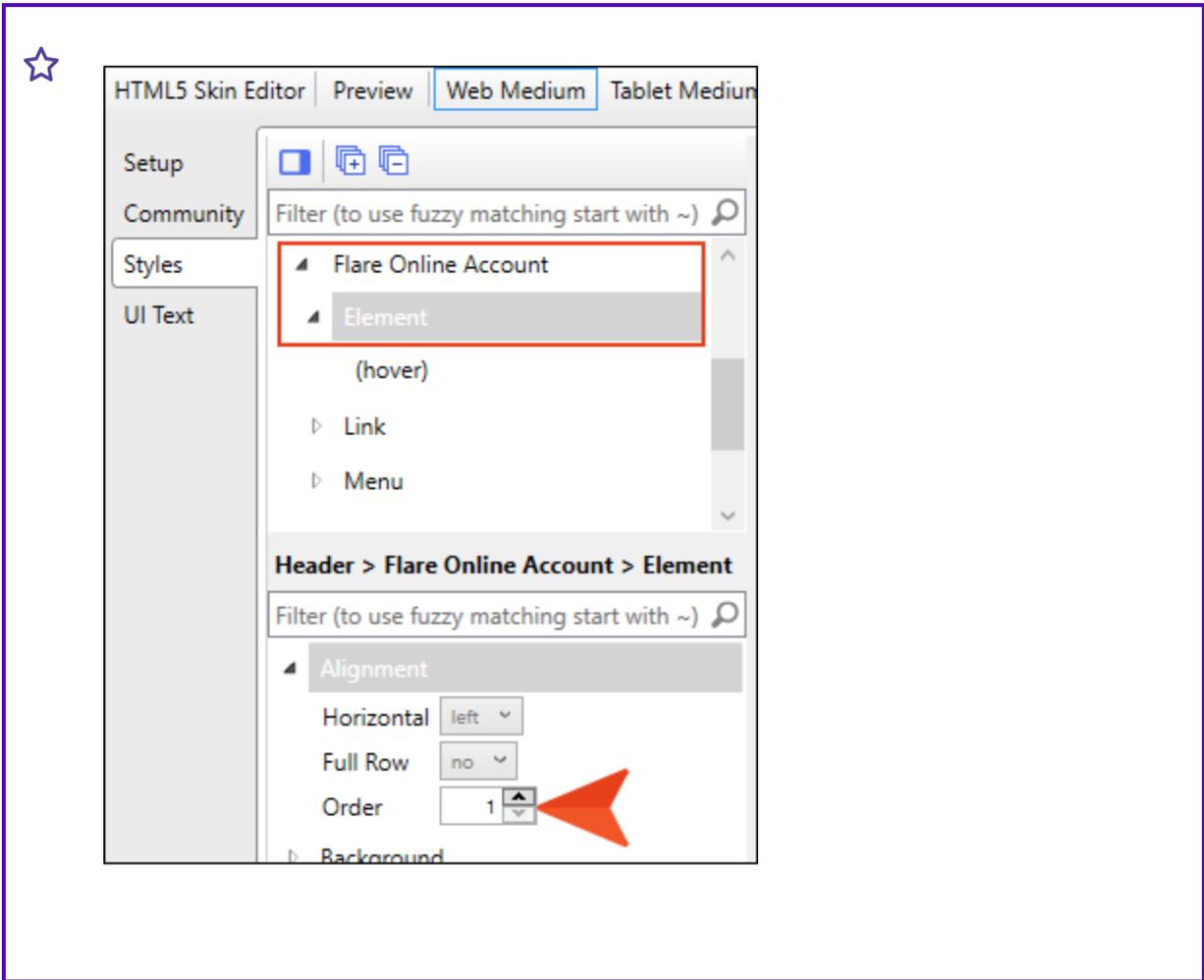
The screenshot shows a website header with a dark teal background. On the left is a logo with a tree icon and the text "YOUR LOGO". To the right of the logo is a search bar with the placeholder text "Search" and a magnifying glass icon. Further right is an "Account" link with a user icon and a dropdown arrow. Below the header is a navigation menu with the following items: "Getting Started", "Features", "Procedures", "FAQs", and "Tips", each with a downward arrow. The main content area has a dark background with the text "Welcome to Our Help Center" in white. Three callout boxes are positioned above the header: "Order Setting: 1" points to the logo, "Order Setting: 3" points to the search bar, and "Order Setting: 4" points to the account link.

You change the values for the Alignment > Order property as follows:

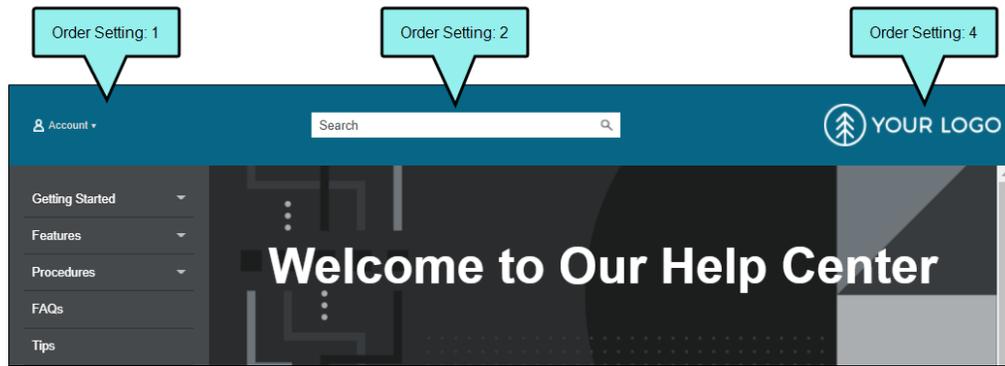
- Logo: 4
- Search Bar: 2
- Flare Online Account Element: 1







☆ As a result, the header will look like this in the output:



## BACKGROUND

You can change any of the following to affect the background:

- **Gradient** This lets you change the background color using a progression effect. Select the beginning gradient color in the first field, and then select a second gradient color in the second field. You can use any of the following to enter or select a color.

Option	Description
	You can type a hexadecimal number (e.g., #000000) directly in this field. Alternatively, you can click the down arrow and choose a color or make the background transparent.
	This opens the Color Picker dialog, which lets you choose a color in many ways. Note that you can select a CSS variable.
	Adds a bar above the cursor. As you move the cursor over any area of your screen, the color changes in the bar to reflect the color that is directly behind the tip of the cursor. When you click, that color is loaded into the Color Picker dialog.

- **Color** This lets you select a single color.
- **Image** This lets you select an image for the background. Click  and use the dialog to select an image file.
- **Repeat** Use this field to tell Flare Desktop whether the image should repeat or not.

 **NOTE** The Image field has the highest precedence, which means that if you enter settings in all of the Background fields, the image will win. Gradient has the next highest precedence. If you want to use the Color field, you need to make sure the Gradient fields are set to transparent and that there is no image selected.

## BLOCK

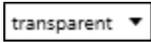
This is the container (or "block") holding content in an element. You can change any of the following to affect the block:

- **Line Height** This is how tall the container is that holds the content. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).
- **Text Align** This changes the alignment of the content. Click in the field and select an option (center, justify, left, right).
- **Text Indent** This is how far the text is moved inward. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).
- **Word Wrap** You can click in the **Word Wrap** field and choose whether to wrap text for the element (normal) or not (nowrap).

## BOX SHADOW

You can change any of the following to affect the box shadow on the element:

- **Horizontal Shadow Length** This is the position of the horizontal shadow. Negative values are allowed. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).
- **Vertical Shadow Length** This is the position of the vertical shadow. Negative values are allowed. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).
- **Shadow Blur Length** This is the blur distance. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).
- **Shadow Color** This lets you select a color for the shadow. You can use any of the following:

Option	Description
	You can type a hexadecimal number (e.g., #000000) directly in this field. Alternatively, you can click the down arrow and choose a color or make the background transparent.
	This opens the Color Picker dialog, which lets you choose a color in many ways. Note that you can select a CSS variable.
	Adds a bar above the cursor. As you move the cursor over any area of your screen, the color changes in the bar to reflect the color that is directly behind the tip of the cursor. When you click, that color is loaded into the Color Picker dialog.

- **Shadow Inset** This changes the shadow from an outer shadow (outset) to an inner shadow. Click in the field and select an option. If you select **false** the shadow will be outset. If you select **true** the shadow will be inset.

## FONT

You can change any of the following to affect the font:

- **Color** This lets you select a color for the font. You can use any of the following:

Option	Description
	You can type a hexadecimal number (e.g., #000000) directly in this field. Alternatively, you can click the down arrow and choose a color.
	This opens the Color Picker dialog, which lets you choose a color in many ways. Note that you can select a CSS variable.
	Adds a bar above the cursor. As you move the cursor over any area of your screen, the color changes in the bar to reflect the color that is directly behind the tip of the cursor. When you click, that color is loaded into the Color Picker dialog.

- **Family** You can select or type a specific font family (e.g., Arial, Tahoma, Verdana).
- **Size** You can change the font size. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points).
- **Weight** You can click in this field and make the font normal or bold.
- **Style** You can click in this field and make the font normal or italic.

## HEIGHT

You enter a height for the element. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).

## LAYOUT

You can click in the **Display** field and choose one of the options (some of these options might not be available for certain styles):

- **none** The element will not be shown.
- **block** The element will be shown and adds a line break after it. For some elements this option might be called **flex**, which reflects the flexbox technology associated with it.
- **inline** The element will be shown but does not add a line break after it, allowing it to be positioned next to other elements.
- **inline-block** The element will be shown but does not add a line break after it, allowing it to be positioned next to other elements. This is similar to inline; however, with this option, a width and height can be set on the element, and top/bottom margin and padding settings are respected.

## MARGIN

You can change the margin for any of the sides on the element (Left, Right, Top, Bottom). In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).

## PADDING

You can change the padding for any of the sides on the element (Left, Right, Top, Bottom). In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).

## SIZE

You can change the height or width of the element. In the first field type a number or use the arrows. Then click in the second field and select the unit of measurement (e.g., pixels, points, centimeters).

## TEXT DECORATION

You can click in the **Decoration** field and select a text decoration (e.g., underline, line-through, overline, underline).

6. Click  to save your work.

# I Flare Desktop Features Not Supported in MadCap Flare Online

There are certain features in Flare Desktop that are not fully supported when you generate targets from MadCap Flare Online. However, a few of these features are supported when publishing directly from a local project in Flare Desktop up to Flare Online.

## Automatically Get Latest Files

If you are working in a dual-bound scenario (see "Dual-Bound Projects" on page 17) and you select the option in the target to automatically get the latest version of files before generating, this option will not work when you build from MadCap Flare Online. Instead, you must first synchronize your files with source control in Flare Desktop and then push those changes to Flare Online.

## Batch Targets

Batch targets cannot be generated from MadCap Flare Online.

## Custom Build Log Folder

In the Options dialog (**File > Options**), Flare Desktop has a feature that lets you choose a custom folder to hold the log file after generating output. This feature is not supported when building from MadCap Flare Online. Instead, the log file is stored at the root level of the output folder.

## Custom Fonts

If you are using custom fonts in your project locally in Flare Desktop, they are not supported when you build output from Flare Online.

# Custom Output Folder

Flare targets let you choose a custom location for your output folder. However, this is not supported when building from MadCap Flare Online. You must use the default location.

# Date/Time Variables

Target generation occurs on a server with Flare Online, so date/time variables are not supported.

# Elasticsearch

Elasticsearch is one of the search engine options that you have in Flare Desktop (along with MadCap Search and Google Search). Currently, using Elasticsearch in your HTML5 output is not supported in targets generated from Flare Online.

However, Elasticsearch is supported when publishing directly to Flare Online from a local Flare project.

# Global Ignored Warnings

You can tell Flare to ignore certain warnings so that they do not display as such in the Builds window pane when generating output. This can be done globally for all targets in all projects. You can also override those global settings for a specific target in a project. However, if you generate output from Flare Online, global settings to ignore warnings are not supported; instead, you must ignore warnings in the target.

# Linked Mimic Movies and Projects

When building from MadCap Flare Online, external links to Mimic movies/projects will not work. However, embedded movies in a Flare project are supported.

# MadCap Pulse

MadCap Pulse is not supported in output that is generated from Flare Online. In order to use Pulse with your output, it must be hosted outside of Flare Online.

## Pre- and Post-Build Events

If you create pre- or post-build events in your Flare target, they will not function when building from MadCap Flare Online.

However, pre- and post-build events are supported when publishing directly to Flare Online from a local Flare project.

## Publishing to Outside Servers

Flare Desktop lets you create destination files for the purpose of publishing to external servers. This feature is not supported when building from MadCap Flare Online. Instead, live builds are always published in Flare Online.

# Viewing Some Output Formats

The following types of output can be generated from MadCap Flare Online, but they cannot be viewed (output files are downloaded to your computer):

- Clean XHTML
- DITA
- Eclipse Help
- EPUB
- Microsoft HTML Help

 **NOTE** Due to issues with Microsoft HTML Help, the CHM file that is downloaded will initially be blocked. To unblock the CHM file, remove it from the ZIP file. Then right-click the CHM file and select **Properties**. On the **General** tab in the dialog, select **Unblock**.

- Microsoft PowerPoint
- Microsoft Word
- Server-Based Outputs:
  - HTML5 Plus
  - WebHelp Plus

 **NOTE** If you want to produce server-based output from MadCap Flare Online, you will need to download the output from Flare Online after it finishes building. You can then publish the output to your server.

# I Security and MadCap Flare Online

MadCap Flare Online leverages the security, power, and flexibility of the cloud to mitigate or eliminate many of the technical hurdles faced by both content creators and information technology professionals. The overhead traditionally associated with managing complex systems can hinder the ability to create content and deliver content efficiently. The goal of this is to provide a high-level overview of the ways that Flare Online addresses these challenges.

Security and privacy are top priorities at MadCap Software, especially when providing customers with a cloud-based system in Flare Online. We are committed to keeping your files, data, and communications secure. Therefore, in choosing Microsoft® Azure as a partner, we focused on selecting a security center that understands the importance of privacy and complies with the highest international and industry-specific compliance standards and uptime guarantees. Microsoft Azure regularly undergoes rigorous third-party audits to ensure and verify the highest level of security controls.

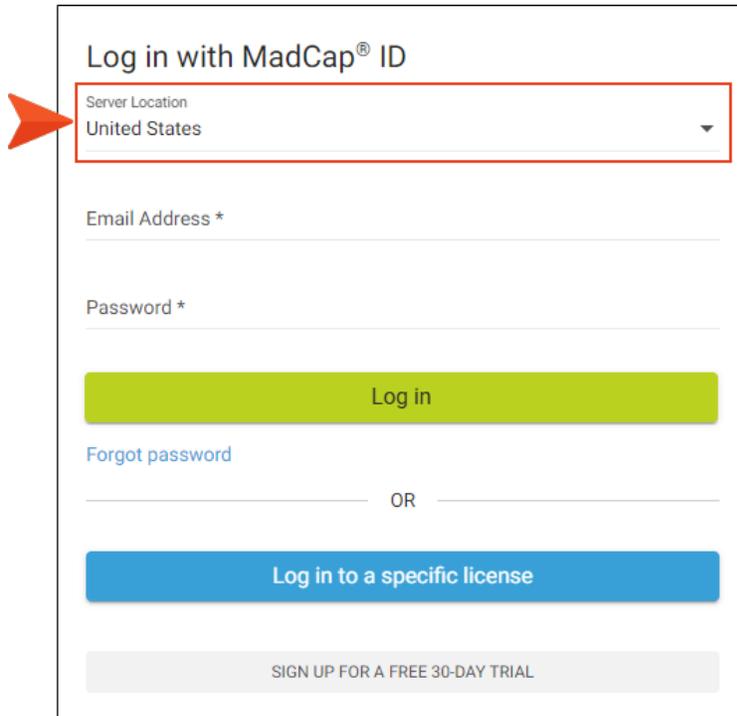
For more information, see the following:

<https://www.microsoft.com/en-us/TrustCenter/Security/default.aspx>

# Server Regions

New license subscriptions have the option a server region.

Depending on which region you chose when subscribing to a Flare Online license (United States or Europe), you can select the corresponding server when logging in to Flare Online.



The image shows a login form titled "Log in with MadCap® ID". At the top, there is a dropdown menu labeled "Server Location" with "United States" selected. A red arrow points to this dropdown menu. Below the dropdown are two input fields: "Email Address \*" and "Password \*". A green "Log in" button is positioned below the password field. Below the button is a link for "Forgot password". A horizontal line with "OR" in the center separates this section from the next. Below the line is a blue button labeled "Log in to a specific license". At the bottom of the form is a grey button labeled "SIGN UP FOR A FREE 30-DAY TRIAL".

The screenshot shows a login form titled "Log in with MadCap® ID". At the top, there is a "Server Location" dropdown menu. The "United States" option is currently selected and highlighted in grey. An orange arrow points to the "Europe" option, which is also visible in the dropdown. Below the dropdown are input fields for "Email Address" and "Password \*". A green "Log in" button is positioned below the password field. A blue link for "Forgot password" is located below the "Log in" button. Below the "Forgot password" link is a horizontal line with "OR" in the center. Underneath this line is a blue button labeled "Log in to a specific license". At the bottom of the form is a grey button labeled "SIGN UP FOR A FREE 30-DAY TRIAL".

- The European server is located in Germany.
- If you have an existing license (i.e., one that was created before the introduction of the European server), it will remain on the United States server.
- The server that you select will hold all of your data and hosted output for that license.
- Previous versions of Flare Desktop will not display the drop-down for selecting a server.
- Regardless of the server, the default MadCap domain is madcapflare.com (e.g., fictionsoft.madcapflare.com). Of course, you can still add your own host mapped domain (e.g., help.fictionsoft.com).
- Each server will have access to a global list of vanities, but will not contain any sensitive information. License vanity, region, and Flare Online key are the only pieces of data shared globally, so each server has access to that data.

# Data Centers and Disaster Recovery

MadCap Software partners with Microsoft Azure to securely host mission-critical infrastructure, such as MadCap Flare Online. Depending on the server you choose when subscribing to Flare Online, the data residency and infrastructure are hosted in one of two locations:

- **United States** Azure WESTUS datacenters
- **Europe** Azure German datacenter

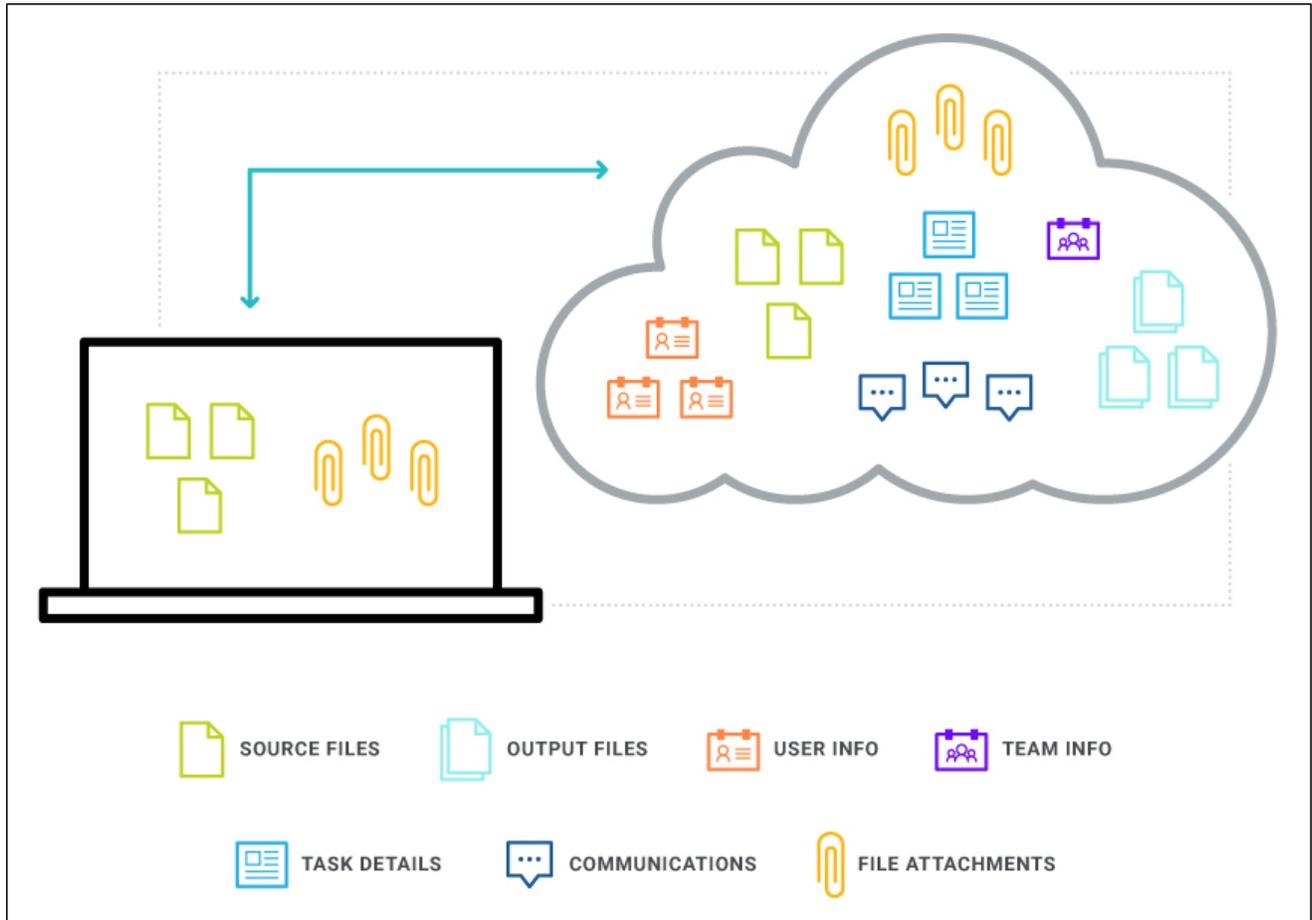
These Azure data centers are ISO27001 certified. For details, see:

<https://www.microsoft.com/en-us/cloud-platform/global-datacenters>

In addition to data stored in the database, the source control provider (Git) has the ability to failover in case of an outage. This is essential in handling mission critical data in the event of a catastrophe.

# Source Control Provider and Data Storage

In addition to creating projects in Flare Online, projects can be uploaded locally from Flare Desktop to Flare Online, thus creating copies of those projects on the cloud. From the cloud versions of your projects, output files can be generated and published. In addition to project source and output files, Flare Online hosts many other types of data, including user and team information, task details, communications between individuals, and ancillary file attachments.



When local projects are uploaded from Flare Desktop to a Flare Online license, they are bound by a Git source control connection.

The following objectives are important for this relationship:

- **Easy Access** Projects are hosted in the cloud, which means they can be accessed from anywhere.
- **Security** Projects are stored securely in the cloud. Communication between your local desktop and the cloud is over HTTPS (HTTP over SSL). This is an encrypted, secure channel of communication. Source control data is secured by user name and security token. It is also possible to configure a license so that authentication is based on single sign-on (SSO) from the company's identity provider, thus adding another level of security.
- **Data Transference** Users can synchronize the local and cloud versions of projects after changes are made to files. In addition, you can retrieve files to a local machine whenever necessary. Uploaded projects can be imported and generated output files can be downloaded from Flare Online.
- **Storage** MadCap Flare Online stores user data in different ways depending on the nature of the data. Some examples of data storage include encrypted SQL databases, source control repositories (GIT), and Azure blob storage.
  - Sensitive data—such as user credentials and company information in the database tier—are stored using encryption to mitigate unauthorized access to data, and ensure your information is stored securely.
  - The methods of storing data follow industry security standards and offer a highly scalable solution to ever expanding storage management tracking needs.
  - If you choose to cancel your subscription, hosted data can be wiped at your discretion.
- **Backups** All data is backed up daily. All user data in Flare Online database backups are encrypted, transmitted remotely, and stored securely. This helps prevent unauthorized access.

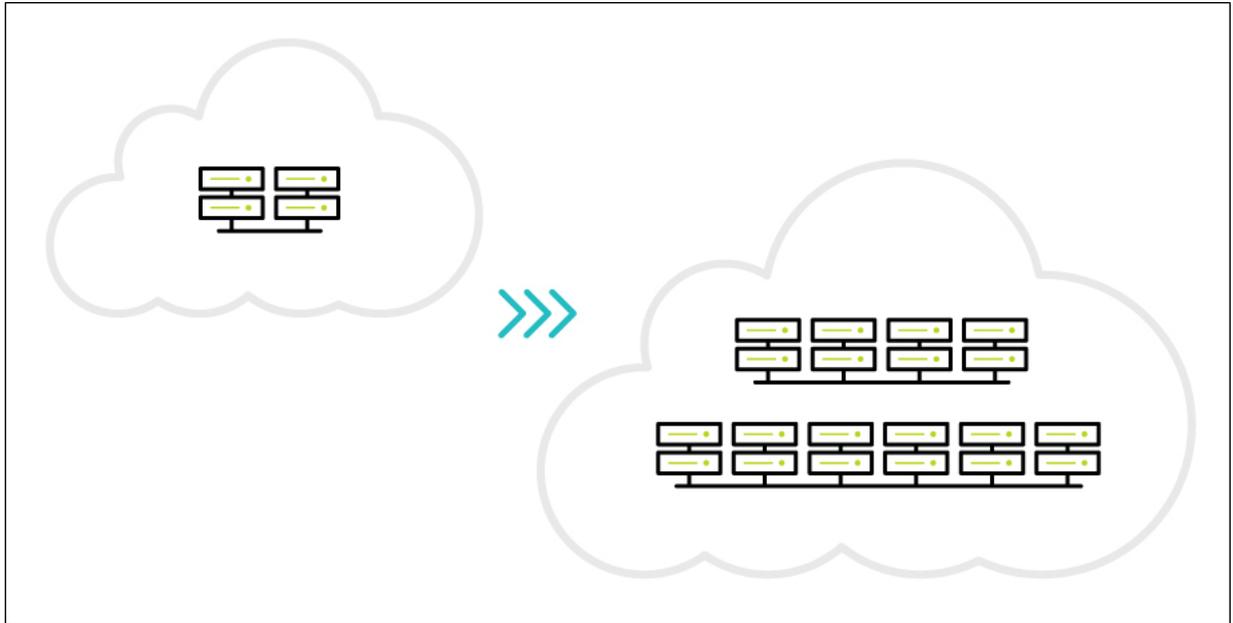
# Web Server Hosting and Management

Every MadCap Flare Online subscription includes access to our highly scalable cloud-based build server. Because MadCap Flare Online is a cloud-based solution, content creators can rapidly generate and publish their content with minimal effort while benefiting from a high level of security, scalability, and durability, something that would otherwise require skilled IT resources to implement. Published output is hosted on a robust, secure, geographically redundant web application server.

With that in mind, the following are important considerations:

- **Reduced Hosting Costs** You can host all of your projects within Flare Online and never worry about managing or scaling costly web servers. Whether you have a small, single project or several large projects, you can host and manage all of your content in one place.
- **Automation and Convenience** From Flare Online, you generate and publish output with minimal effort. You also have the ability to quickly roll back published outputs when necessary, with the click of a button. Builds can be initiated manually or they can be scheduled. All of this can be done from any device supporting the browser-based interface.
- **Availability and Monitoring** Your content is vital to your company, so 24-hour availability of the web server is crucial, as is constant uptime monitoring. All components of MadCap Flare Online are monitored 24 hours a day, 7 days a week, 365 days a year using remote monitoring systems. MadCap Software has staff on hand to respond to outages and security breaches.
- **Security Management** Data in MadCap Flare Online is secured in the various ways.
  - Web services have built-in load balancers to stave off most DOS (Denial-Of-Service) attacks.
  - We provide unauthorized access monitoring and incident response. Any breaches in data security will be reported to affected customers.
  - User portal and API endpoints (i.e., the connection between Flare Desktop and Flare Online) are secured via user authentication.
  - All data endpoints are secured using SSL. The user portal, API endpoints, source control provider (Git), and all backend system communications are all encrypted.
  - Published sites that are not set to “live” are secured by user authentication.

- **Scalability** As your content management needs grow, so will your demands for a system that dynamically scales as well. Over time, the builds that you generate in Flare Online will consume more and more space. Flare Online offers ease with scalability for your output, which helps to eliminate worries about CPU, memory, and disk-intensive projects.



## Service Level Agreement

The full Service Level Agreement (SLA) for MadCap Flare Online (and other MadCap Software products) can be found here:

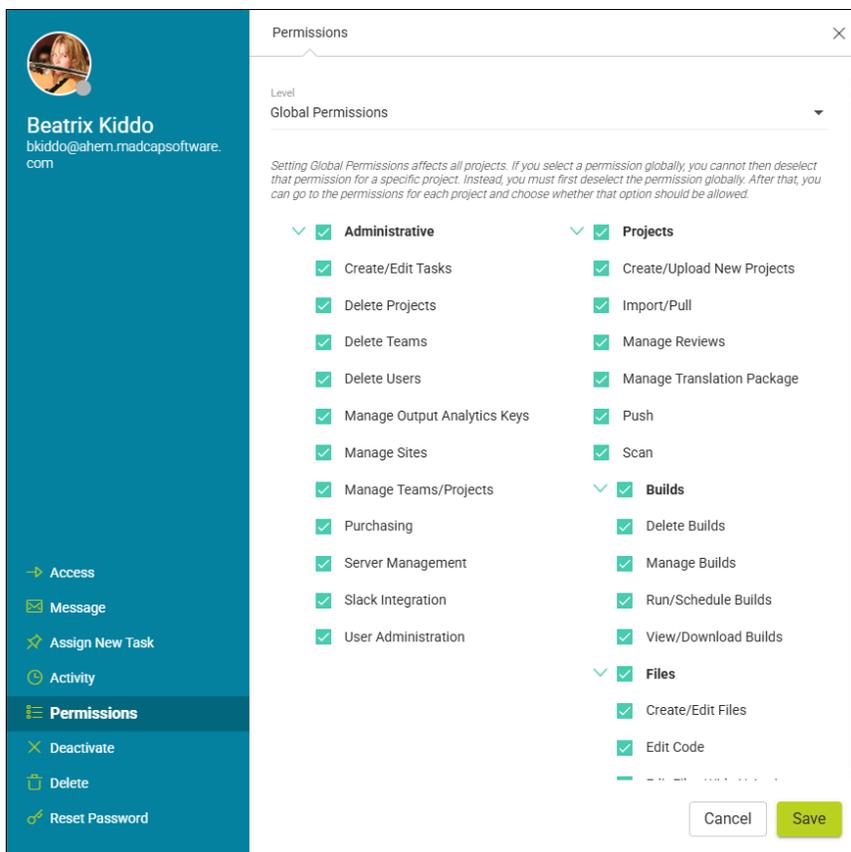
<https://www.madcapsoftware.com/company/service-level-agreement/>

# Application and Browser

Much of the work in MadCap Flare Online (e.g., management of users, teams, tasks, projects, and builds) requires user interactions to be performed through a browser. In addition to Flare Desktop requiring end-to-end encryption, all traffic from your web browser to the MadCap Flare Online portal is also secured using industry standard security practices such as SSL.

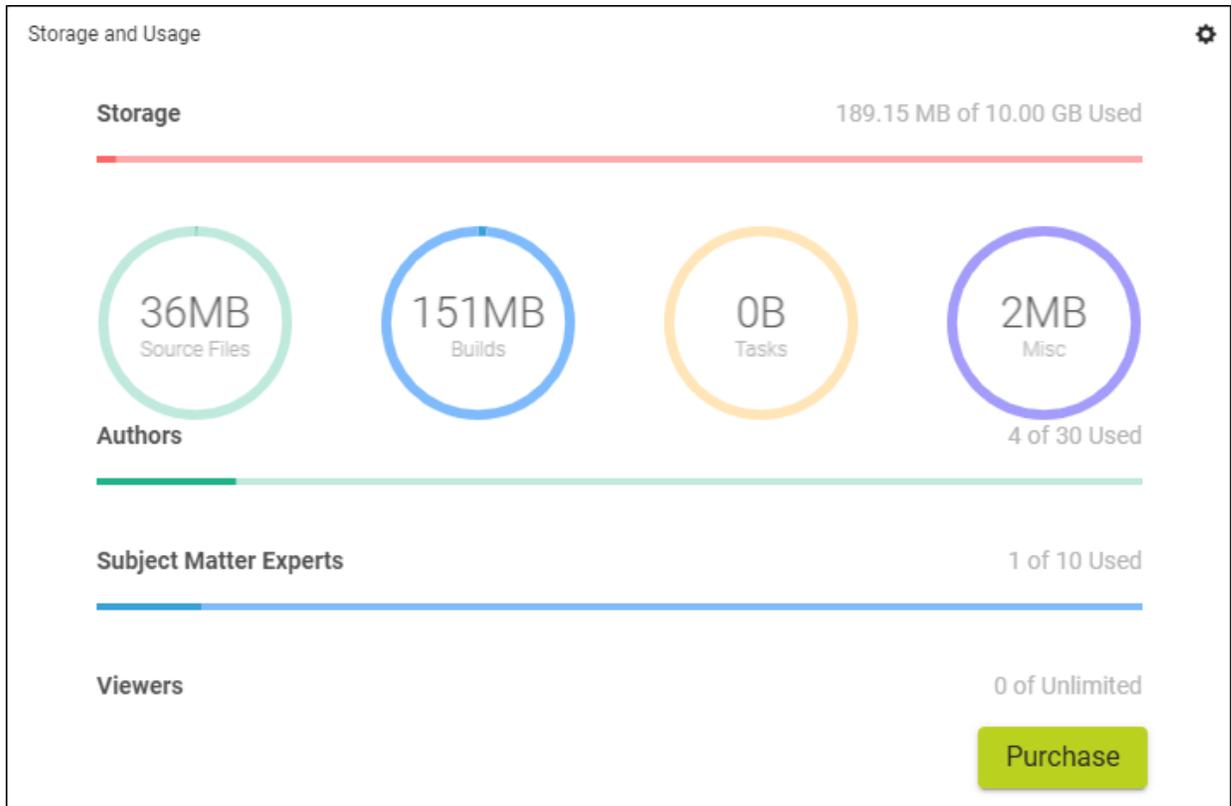
Following are some of the notable features in Flare Online that contribute to a secure, accessible work experience:

- **Permissions** In Flare Online, permissions allow you to dictate which users can see certain information and perform a variety of functions. In addition to basic permissions, there are several administrator-level rights that can be set, giving you the most flexibility to control how your data and files are being managed and distributed.

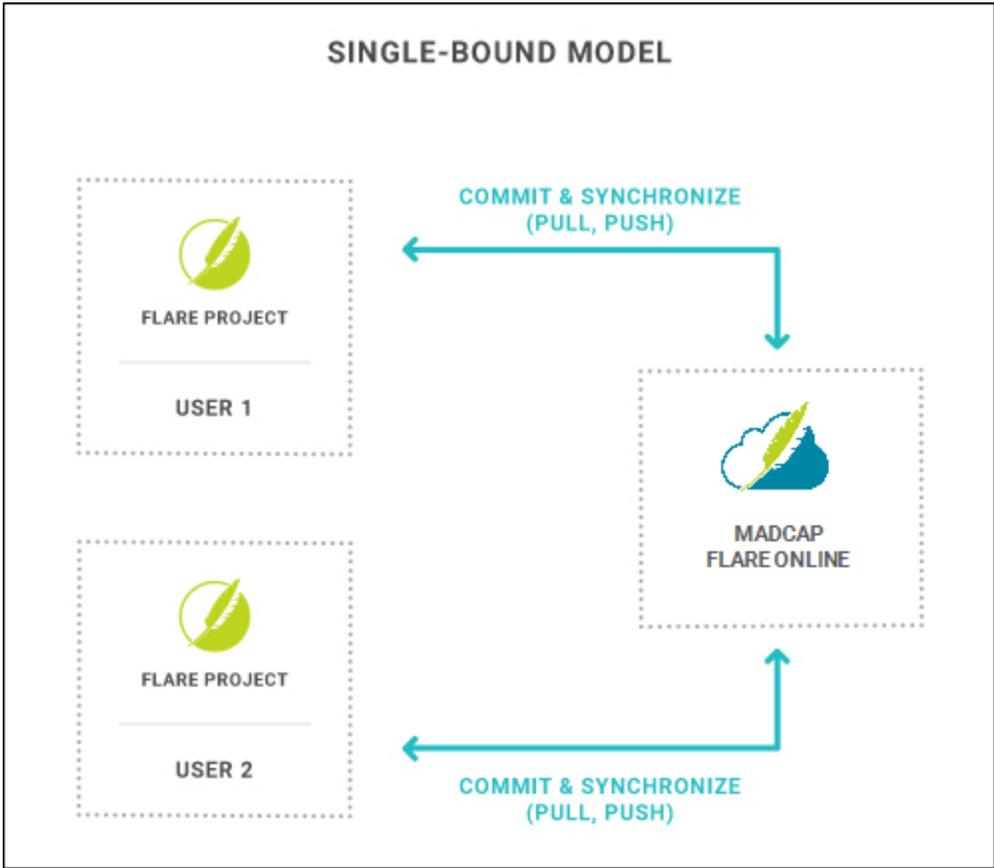


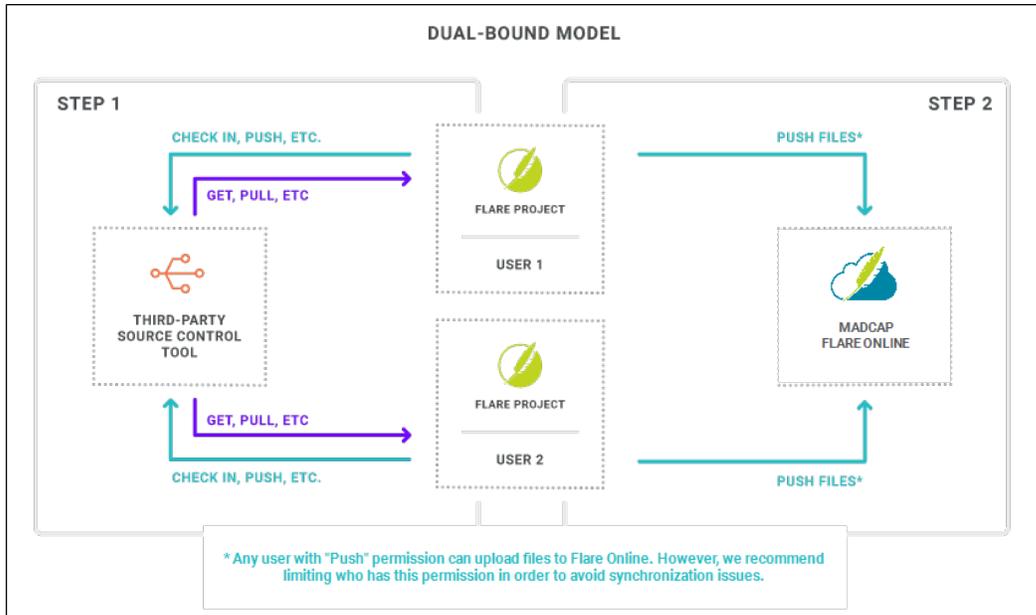
- **Importing Projects** If another user uploads a project locally from Flare Desktop to your MadCap Flare Online license and you do not yet have that project on your computer, you can import it. You can do this from the Flare Online window pane in Flare Desktop.

- **Downloading Builds** After generating a target, you can download the output to your computer. This is an optional step, in case you want to have a local copy of the build (e.g., you want to view your Microsoft HTML Help output, which is an output format that you cannot view from Flare Online).
- **Purchasing Seats and Space** Built-in widgets inform you when space or user count becomes a concern. When you run out of user seats or storage space in Flare Online, you can purchase more. You do not need to contact MadCap Software to do this; instead, you can purchase user seats and storage space directly from the Flare Online interface.



- **Single-Bound and Dual-Bound Projects** When you upload a project to Flare Online, the files are connected to Flare Online via an integrated source control system (Git). Your interaction with source control can follow one of two models—single-bound (recommended) or dual-bound. Single-bound projects are not bound to an additional third-party source control provider; they only use Flare Online's source control system. Dual-bound projects, on the other hand, are already bound to another source control provider, and therefore are bound to both the original third-party source control provider and to Flare Online.





- **Security Options** On your license, you can set the maximum login attempts, automatic logout settings when the system is idle, as well as password change and minimum requirements.

### Security

- Login attempts allowed:  
5 ▼ attempts
- Logout after idle for:  
30 ▼ minutes
- Require password change after:  
90 ▼ days
- Password minimum:  
14 ▼ characters

# MadCap Flare Online Features Per Output Type

Following are MadCap Flare Online features supported in each output type.

	HTML5	PDF	Word	Clean XHTML	Eclipse Help	EPUB	HTML Help	PPTX
Analytics	✓	✗	✗	✗	✗	✗	✗	✗
Build Output From Flare Online	✓	✓	✓	✓	✓	✓	✓	✗
Private Output	✓	✗	✗	✗	✗	✗	✗	✗
Publish Directly to Flare Online	✓	✓	✓	✓	✓	✓	✓	✗
View Output From Flare Online	✓	✓	✓	✓	✓	✓	✗	✗

# Logging In and Out

If you have an account in Flare Online, you are able to log in and out of your account from Flare Desktop. When you are logged in, you are able to access project properties, upload (bind) and import projects (via Git), and push project changes to the cloud.

 **NOTE** If the Flare Online license is configured for single sign-on (SSO), you can log in through your company's identity provider. Otherwise, you would use the same password that you set in Flare Online. For details on setting up SSO, see the documentation for Flare Online.

This chapter discusses the following:

Logging In to Flare Online .....	84
Logging Out of Flare Online .....	84
The SSO Login Experience .....	85

# I Logging In to Flare Online

1. Open the project in MadCap Flare Desktop.
2. Do one of the following, depending on the part of the user interface you are using:
  - In the upper-right of Flare Desktop, click **Log In**.
  - Select **View > Flare Online**. The Flare Online window pane opens. Click **Log In**.
3. What happens next depends on various factors.

If the main Flare Online portal displays, select the **Server Location** (United States or Europe), depending on the region you chose when subscribing to Flare Online. Enter your **Email Address** and Flare Online **Password**, then click **Log in**.

If you are attempting to log in to a specific license, and it is set up to use SSO, you will need to enter the credentials for your company's identity provider, and maybe even use two-factor authentication (e.g., approve the login on your smart phone).

If you are attempting to log in to a specific license, and it is not configured with SSO, enter the same password that you set up in Flare Online previously.



**NOTE** For more details on the login experience with SSO, see the documentation for Flare Online.

# I Logging Out of Flare Online

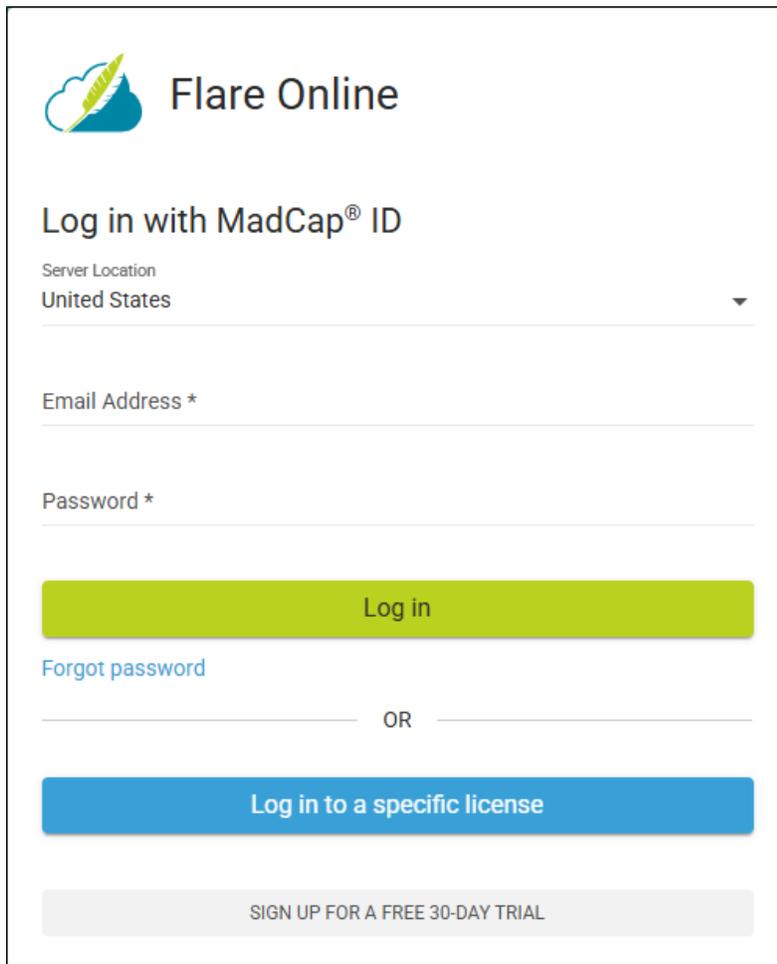
1. Open the project in MadCap Flare Desktop.
2. Do one of the following, depending on the part of the user interface you are using:
  - In the upper-right of Flare Desktop, click your avatar and select **Log Out**.
  - Select **View > Flare Online**. The Flare Online window pane opens. Click .

# I The SSO Login Experience

The single sign-on (SSO) login experience depends on different factors, such as whether it's the user's first time logging in, if there are multiple licenses, how the identity provider (IdP) is set up, etc.

## First Time SSO Login

Clicking either the option in the upper-right of Flare Desktop or the option in the Flare Online window pane opens this browser-based window if it is your first time logging in.



The screenshot shows the Flare Online login page. At the top left is the Flare Online logo, which consists of a blue cloud with a yellow lightning bolt and the text "Flare Online". Below the logo is the heading "Log in with MadCap® ID". Underneath is a dropdown menu for "Server Location" with "United States" selected. There are two input fields: "Email Address \*" and "Password \*". A green "Log in" button is positioned below the password field. Below the button is a link for "Forgot password". A horizontal line with "OR" in the center separates this section from the next. Below the line is a blue button labeled "Log in to a specific license". At the bottom of the form is a light gray button labeled "SIGN UP FOR A FREE 30-DAY TRIAL".

Select the **Server Location** (United States or Europe), depending on the region you chose when subscribing to Flare Online. Enter your **Email Address** and Flare Online **Password**, then click **Log in**.

 **NOTE** If you do not already have a Flare Online password, you can click **Forgot password** to set one up.

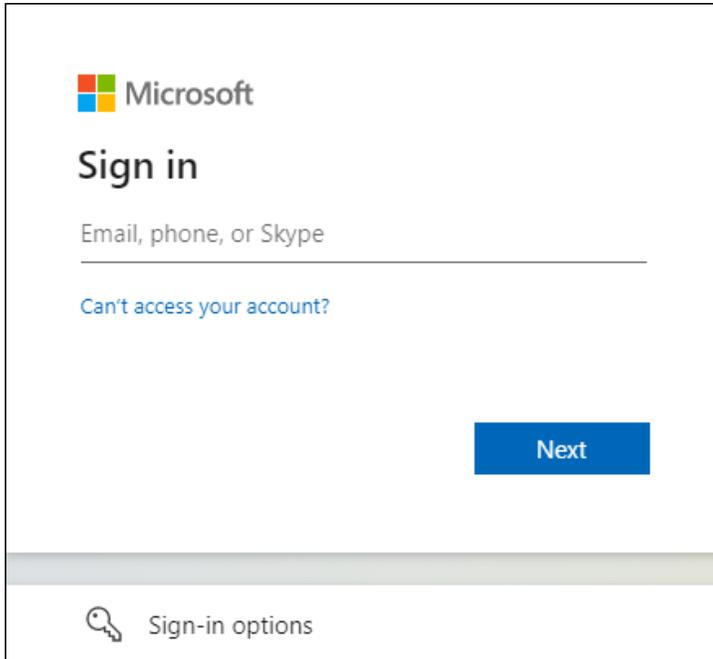
Some Flare Online users might be part of multiple Flare Online licenses. Not only that, but some of those licenses might be enabled for SSO and some might not. Those users can click **Log in to a specific license** instead and enter the appropriate license vanity. Otherwise, clicking **Log in** displays the license hub, which shows all of your Flare Online licenses (if you have more than one). You can then select the Flare Online license you want to log in to.

If the license is enabled for SSO, you will see a window directing you to log in with a third party, although you can customize the text on the button to display something different (e.g., Microsoft Login, Okta SSO, Auth0 Access).

After you click the button to log in, additional windows open so you can enter credentials of some kind. The type of credentials depends on how your IT department sets up the IdP (e.g., password, verification code sent to email, two-factor authentication via smart phone).

☆ EXAMPLE – Password

In this example, Microsoft Azure is the IdP, and it has been set up to first ask for your email, with the possibility to select other sign-in options (e.g., security key).



Microsoft

## Sign in

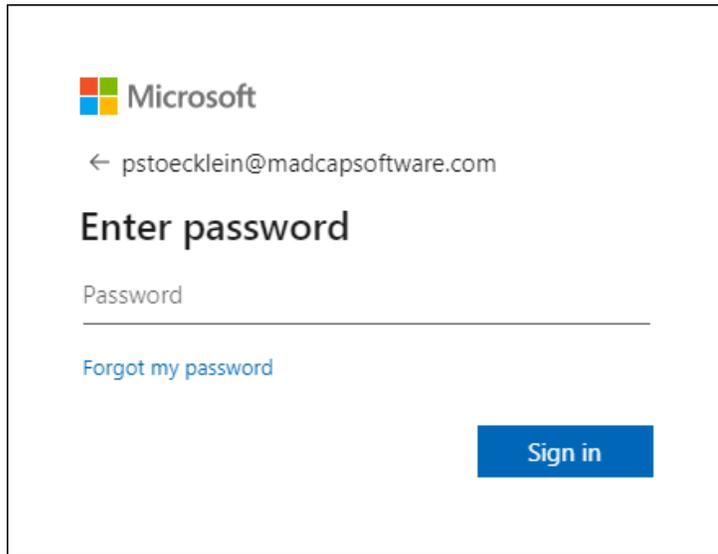
Email, phone, or Skype

[Can't access your account?](#)

Next

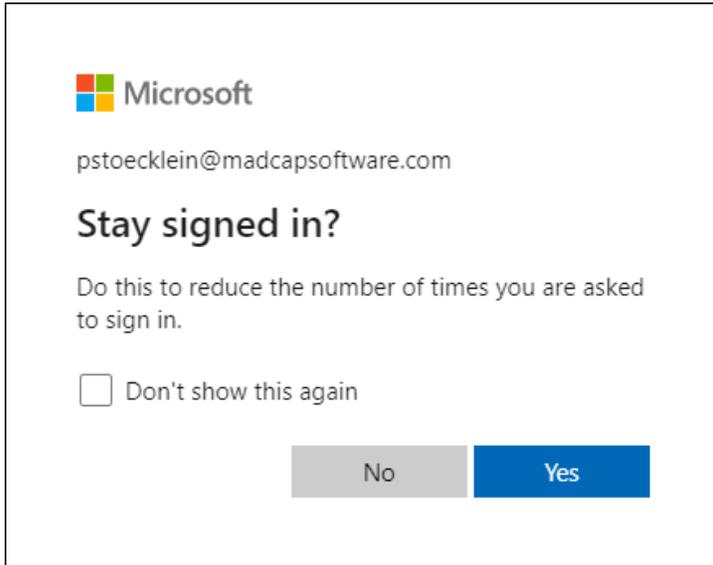
 Sign-in options

- ☆ After this, Microsoft asks for your IdP password (i.e., the password you use to log in to Windows when you start your computer).



The screenshot shows a Microsoft login interface. At the top left is the Microsoft logo. Below it is the email address 'pstoecklein@madcapsoftware.com' with a back arrow to its left. The main heading is 'Enter password'. Below the heading is a text input field labeled 'Password'. Underneath the input field is a blue link that says 'Forgot my password'. At the bottom right of the form is a blue button with the text 'Sign in'.

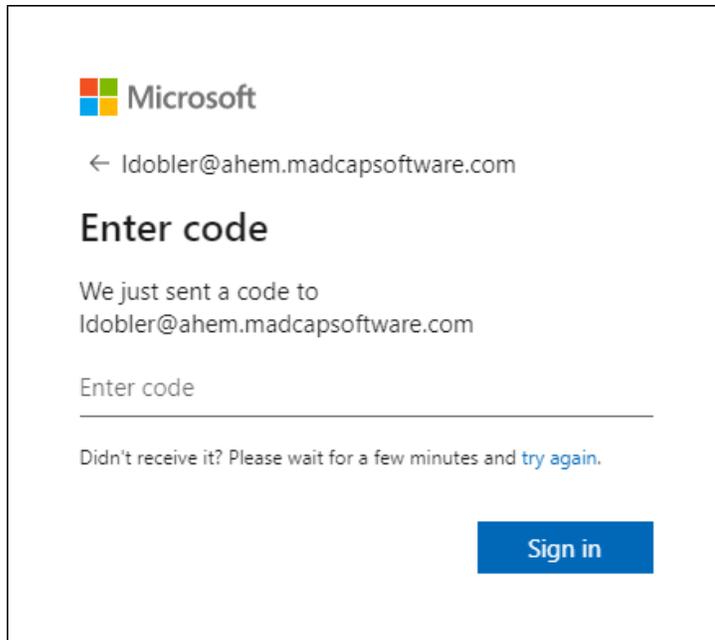
☆ Then, it might ask if you want to stay signed in.



After this window, you are logged in to Flare Online.

☆ **EXAMPLE** – Verification Code

This example is the same as the previous one, except that the IdP is set up to ask for a verification code instead of a password.

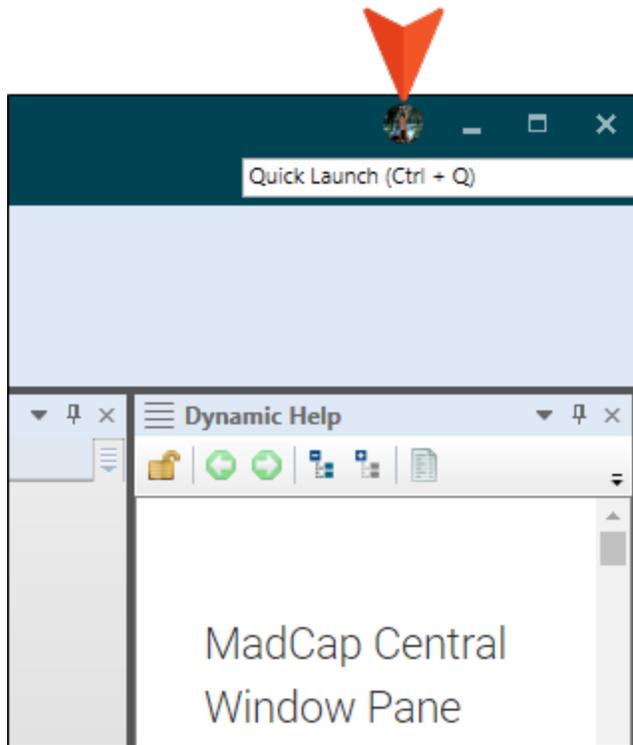


In this case, you receive an email, where the code is found.

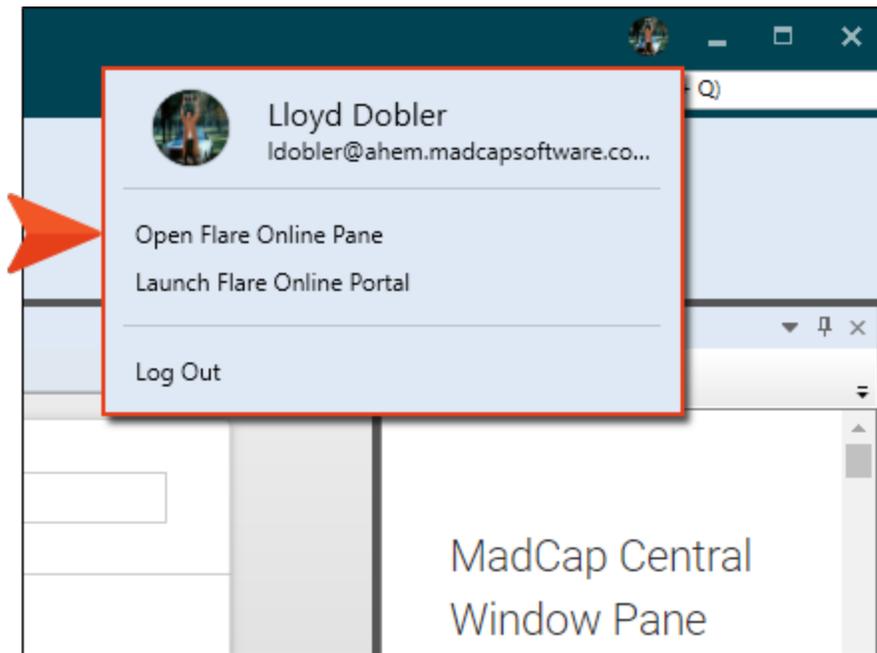
After pasting the code into the field and clicking **Sign in**, you are logged in to Flare Online.

# The Flare Desktop Interface After Logging In

After you log in to Flare Online from Flare Desktop, the login option in the upper-right changes to display your avatar (or initials if an avatar is not yet set in Flare Online).



You can click the avatar to open a drop-down menu. From here you can open the Flare Online window pane, launch the Flare Online portal in a browser, or log out.



# After the First Login

For a license that is enabled with SSO, you need to enter credentials only the first time you log in if you are using a browser. If you log out and then try to log back in, you will see the SSO login window once more.

When you click the button to log in again, you do not need to enter the IdP credentials a second time. Instead, you are simply logged in with them. This is different than a license that is not enabled for SSO, where you must enter your unique Flare Online password each time you log in.

However, if you log out through the Flare Desktop interface (as opposed to a browser) and then log back in, it's possible you will need to enter the credentials once again.

## CHAPTER 4

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# Binding a Project to MadCap Flare Online

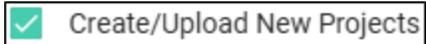
You can upload a project to Flare Online from Flare Desktop. A copy of the project files will therefore reside in the cloud via Flare Online, and you will be able to keep the local and cloud versions of the project synchronized using integrated source control. You will also be able to generate and publish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

This chapter discusses the following:

Permission Required? .....	95
How to Upload (Bind) a Project to Flare Online .....	96

# I Permission Required?

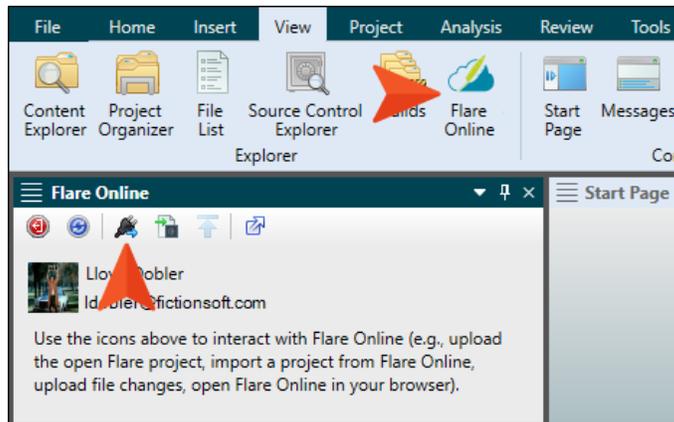
For this activity, you must have the following permission setting in Flare Online:



For more information about permissions, see the documentation for Flare Online.

# I How to Upload (Bind) a Project to Flare Online

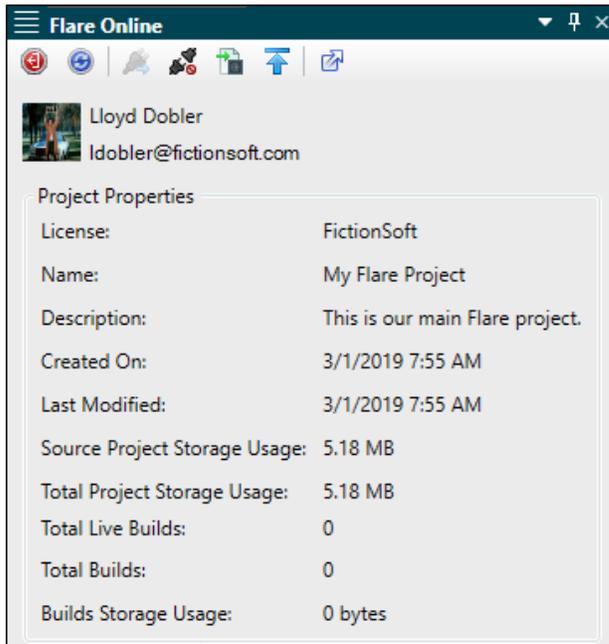
1. Open the project in MadCap Flare Desktop.
2. Select **View > Flare Online**. The Flare Online window pane opens.
3. Be sure to log in if you aren't already.
4. Click .



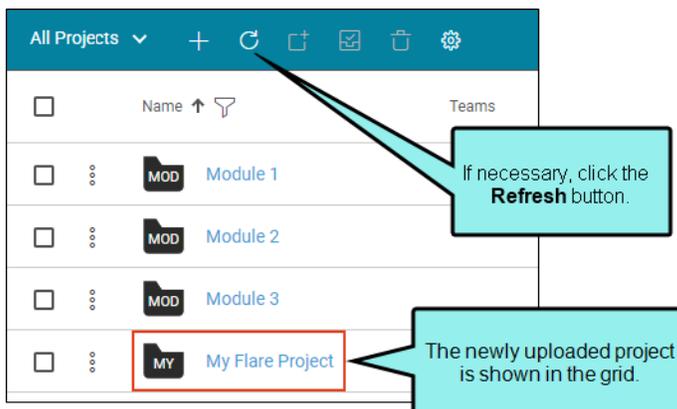
✔ **TIP** If this button is disabled, try clicking in the window pane first.

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

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



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



 **NOTE** If your project is dual-bound (see "Dual-Bound Projects" on page 17), be sure you check in or push the project files to your third-party source control provider after you bind to Flare Online. This will ensure that other users who import the project from source control have the most recent version of the project.

 **NOTE** When you bind a project to Flare Online, a .gitignore text file is created in your local project folder. Advanced users can edit the .gitignore file with a text editor to control which files or folders can be pushed to your Git repository. You can also specify which files and folders are ignored by Git, and are not pushed to the repository.

 **NOTE** If you intend to build a target that links to an outside project (e.g., for the purpose of importing files via Global Project Linking, project merging, or multilingual output), make sure that the other project is also uploaded to Flare Online. Otherwise, the automated imports or merging will not work.

 **NOTE** Binding and unbinding is usually straightforward when using the Flare Desktop interface. However, if you bind to projects outside of Flare Desktop, there is more you should know.

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

# Importing Projects From Flare Online

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

In order to import a project, you must be associated with that project in Flare Online. For more information, see the documentation for Flare Online.

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

 **NOTE** If your project is already bound to a third-party source control provider other than Git (i.e., you are working in a dual-bound model as opposed to a single-bound model—see "Dual-Bound Projects" on page 17), the Import option in the Flare Online window pane will be disabled. This is because you should import your project directly from source control using your non-Flare Online binding.

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

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

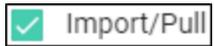
 **NOTE** When a project is dual bound to Flare Online and a non-Git third-party provider, keep the following in mind if you (i.e., the second user) want to access this setup. After importing the project from Perforce Helix Core, Subversion, or Team Foundation Server, you will have to re-bind the project to Flare Online. In the MadCap Flare Online window pane in Flare Desktop, click to upload (or bind) the project to Flare Online. In the Bind Project dialog, it is important to enter the exact name of the project as it currently exists in Flare Online. When you click **OK**, a message displays asking if you want to bind to the existing project. Select **Yes**. This re-establishes the existing Flare Desktop-Flare Online connection; note that it does not create a new binding.

**This chapter discusses the following:**

Permission Required? .....	101
How to Import a Project from Flare Online .....	102

# I Permission Required?

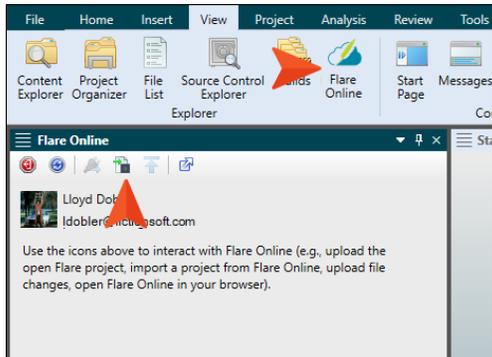
For this activity, you must have the following permission setting in Flare Online:



For more information about permissions, see the documentation for Flare Online.

# I How to Import a Project from Flare Online

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



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

The Import Project dialog opens.

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

# Viewing Project Properties

If you have access to a project in Flare Online (i.e., you have been added to the project), you can view its properties in the Flare Online window pane. This lets you see relevant information about the project, such as when it was added to Flare Online, the amount of space it is using in Flare Online, and the number of targets and builds.

# I How to View Project Properties in Flare Desktop

1. Open the project in MadCap Flare Desktop.
2. Open the Flare Online window pane (**View > Flare Online**).
3. If you are not already logged in to Flare Online, log in to your account.

Once you are logged in, the project's properties appear in the MadCap Flare Online window pane. You can view the following properties:

- **License** The name of the license where the project was uploaded.
- **Name** The name of the project.
- **Description** The project description (if applicable).
- **Created On** The date the project was added to Flare Online.
- **Last Modified** The last time you pushed changes to the project to Flare Online.
- **Source Project Storage Usage** The total size of the project's source files.
- **Total Project Storage Usage** The total size of the project's files (source plus output).
- **Total Targets** The number of targets in the project.
- **Total Live Builds** The number of builds for this project that are currently set to "Live" in Flare Online (i.e., the builds are published so that the public can see the output).
- **Total Builds** The number of builds for this project.
- **Builds Storage Usage** The amount of storage in Flare Online used by builds.

# Source Control Activities

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

This chapter discusses the following:

Committing and Synchronizing (Pull, Push) in a Single-Bound Model .....	106
Pushing in a Dual-Bound Model .....	111

# Committing and Synchronizing (Pull, Push) in a Single-Bound Model

If you are working in a single-bound model (see "Single-Bound Projects" on page 13), you author content in Flare Desktop. When you want to transfer your changes to Flare Online, you must commit and synchronize the changes.

## Permission Required?

For this activity, you must have the following permission settings in Flare Online:



For more information about permissions, see the documentation for Flare Online.

## Commit

To commit a changed file is to record it to the local repository. Essentially you are saying, "I'm ready to transfer this content up to the cloned project in Flare Online." Committing files gives you the opportunity to organize them into different groups when you add them to Flare Online. You can also add a unique comment to each commit.

☆ **EXAMPLE** You've made changes to 23 files in your project. Maybe 17 of the files are related to Feature A that you are documenting and the other 6 are related to Feature B.

Suppose your company policy is that you must add a comment each time you upload changes and provide a summary of what you did. To keep the summary for Feature A separate from Feature B, you decide to do two commits.

First, you use the Pending Changes window pane in Flare Desktop to select the 17 changed files related to Feature A. Then you perform the commit and add a relevant comment.

After this, you select the 6 changed files related to Feature B and perform another commit with a different comment.

# How to Commit Files in a Single-Bound Project

1. Open the project locally in MadCap Flare Desktop and make your changes.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When you commit the changes, it will be for that branch.

2. Do one of the following, depending on the part of the user interface you are using:

- **Status Bar** In the lower-right of Flare Desktop, click  (a number indicates how many files contain changes that need to be committed).

 **NOTE** If you do not see this option, make sure **View > Status Bar** is enabled.

- **Pending Changes Window Pane** From the **Source Control** ribbon, open the Pending Changes window pane. Select the files in the window pane that you want to commit, and in the local toolbar click .
- **Ribbon** Select **Source Control > Commit** (for selected files) or **Source Control > Commit All** (for all files in the project).
- **Right-Click** If you have the Content Explorer, Project Organizer, Pending Changes window pane, or File List open, right-click the file you want to commit and select **Source Control > Commit** (for selected files) or **Source Control > Project > Commit All** (for all files in the project).

The Commit dialog opens. The selected files are listed with check boxes next to them.

3. Enter a comment tied to the commit. This enables you to keep an audit trail for a file. The comment can then be viewed from the History dialog, which can be accessed from the Source Control Explorer, the Source Control ribbon, the File menu, or the Source Control button .
4. Click **Commit**.

# Synchronize

To synchronize means to pull, then push, committed changes between the cloned project in Flare Online and your local project in Flare Desktop. This allows you to retrieve changes that other writers have uploaded to Flare Online from their local projects, and they can get your changes as well. You cannot synchronize changes from Flare Online, but you can from Flare Desktop.

## How to Synchronize Files in a Single-Bound Project

It is possible to use the Pull and Push options in the Flare Desktop interface individually to synchronize your files, but it is more convenient to use the Synchronize option instead. Flare Desktop will first pull changes from the project in Flare Online. After that, it will push changed files from the local project up to Flare Online.

1. Do one of the following in the project locally in Flare Desktop, depending on the part of the user interface you are using.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When you synchronize files, it will be for that branch.

- **Status Bar** In the lower-right of Flare Desktop, click  (a number indicates how many commits need to be pushed or pulled).

 **NOTE** If you do not see this option, make sure **View > Status Bar** is enabled.

- **Ribbon** Select **Source Control > Synchronize**.
  - **Right-Click** If you have the Content Explorer, Project Organizer, Pending Changes window pane, or File List open, right-click any file and select **Source Control > Project > Synchronize**.
2. (Optional) If you did not commit your files before starting the synchronize, a dialog asks if you want to commit your files. Click **Yes** to continue.

 **NOTE** You must commit *all* modified files to proceed with the synchronization.

3. In the Select Remote for Synchronize dialog, select the remote repository (if necessary) and click **OK**. If you are using a dual-bound setup, origin is typically the name of the repository for the first binding, and MadCapCentral is the name for the Flare Online binding.



**NOTE** Some elements in Flare Desktop reference the old "Central" name, even though it has since been renamed to Flare Online.

If no conflicts were discovered during the synchronization, you do not need to continue with the following steps; you are finished.

If conflicts were found (i.e., a remote file is different from the version in your local repository), the Resolve Conflicts dialog opens. Continue with the following steps.

4. Do one of the following:
  - If you want to accept all of the differences between the remote and local files, thus merging them, click **Auto Merge All**. If this step is a success, you do not need to continue with these steps.
  - If you want to review the differences in the files side by side and resolve each conflict (or if auto-merging is not possible due to conflicts occurring in the same location in a file), click **Resolve**. The Resolve Version Conflict dialog opens.
5. From the Resolve Version Conflict 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.
  - **Undo my local changes** Automatically removes your changes and keeps changes from other authors.
  - **Discard external changes** Automatically removes changes from other authors and keeps your changes.

6. If you selected the option to use the merge tool, the Merge Changes dialog opens. Use this dialog to view and select changes. You can take actions in the following ways.
  - **Click a Change** Use the key at the top of the dialog, as well as the color coding on the local and server sides, to determine if a change has been added (new), deleted, changed, moved, or is in conflict (difference occur in the same paragraph). For conflicts in the same paragraph (i.e., areas where a diagonal line is shown), you can click the icon next to either the local or server change and choose **Keep Change**. This will copy that change to the text area at the bottom of the dialog.
  - **Type Content** If you want to use your changes as well as those from another author, 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.

 **NOTE** If you selected "Merge as Text" in the local toolbar and are working in the code, you can click on text with a hatched background to keep the change in it. After you click on text with a hatched background, the hatched lines are removed, leaving a solid color.

7. After all conflicts have been resolved, click **OK**. A message lets you know that a backup of the file has been created in case you need to roll back to it. Click **OK**.
8. Click **OK** in any remaining dialogs.
9. Because you encountered conflicts, your changes were not pushed up to Flare Online. Therefore, click the **Synchronize** option again to complete the process.

# I Pushing in a Dual-Bound Model

If you are working in a dual-bound model (see "Dual-Bound Projects" on page 17), you will author your content in Flare Desktop and then use your third-party source control provider to synchronize your files with those from other writers. After this, you can use Flare Desktop to push those changes to Flare Online.

 **NOTE** It is possible for multiple people working on a dual-bound project to push files to Flare Online. However, if you are using a source control provider other than Git for the first binding, the most recently pushed files are the ones that are used in Flare Online. In other words, the last person to push "wins." To avoid issues, be sure that you have the most recent version of file changes from all other writers in your local project before you push. You may even want to limit users' permissions (see the documentation for Flare Online) so only one or two people are allowed to push files to Flare Online.

## Permission Required?

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



For more information about permissions, see the documentation for Flare Online.

# How to Push Files in a Dual-Bound Project

1. Open the project in MadCap Flare Desktop.
2. Get the latest version of the files from your third-party source control provider.
3. Select **View > Flare Online**. The Flare Online window pane opens.
4. Be sure to log in if you aren't already.
5. In the local toolbar of the Flare Online window pane, click .
6. In the dialog to select the remote repository, make sure **MadCapCentral** is selected. If it is not, click the drop-down and choose it. Then click **OK**.

A progress dialog shows you the status of the push. If the changes are pushed successfully, a confirmation will appear.

 **NOTE** Some elements in Flare Desktop reference the old "Central" name, even though it has since been renamed to Flare Online.

 **NOTE** When you are dual-bound using Git-Flare Online (see "Dual-Bound Projects" on page 17), you can push to both Flare Online and Git. It is possible that the files in the main Git repository and the files in Flare Online will become out-of-sync if changes are made in one repository (i.e., Git or Flare Online) and not made in the other. If this happens, you will see the Flare Desktop Conflict Resolution dialog. You can use this dialog to accept or reject other users' changes. For more information about merging source control files and conflict resolution, see the Help system.

**CHAPTER 8**

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# Analytics Activities

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

This chapter discusses the following:

- Creating and Editing Analytics Keys ..... 114
- Associating Analytics Keys With Targets ..... 115
- Managing Analytics Keys ..... 116
- Downloading Analytics ..... 117

# Creating and Editing Analytics Keys

Analytics keys are associated with Flare HTML5 targets. You can create and edit these keys either in Flare Desktop or in Flare Online. To do this, you must have the permission in Flare Online to “Manage Output Analytics Keys” (see the documentation for Flare Online).

## How to Create or Edit an Analytics Key in Flare Desktop

1. Open an HTML5 target.
2. Select the **Analytics** tab.
3. From the **Provider** field, select **Flare Online**.
4. If you are not yet logged in to Flare Online, click **Login**. Then complete the fields in the dialog and click **OK**.
5. From the **Flare Online License** field, choose your license.
6. Next to the **Key** field, click **Create**.  
If you already have a key that you want to edit, select it from the drop-down, then click **Edit**.
7. Enter a name for the key and an optional description, then click **OK**.
8. Click  to save your work.

## What's Next?

If your new analytics key is not already associated with a target, you need to open the target and select it.

# I Associating Analytics Keys With Targets

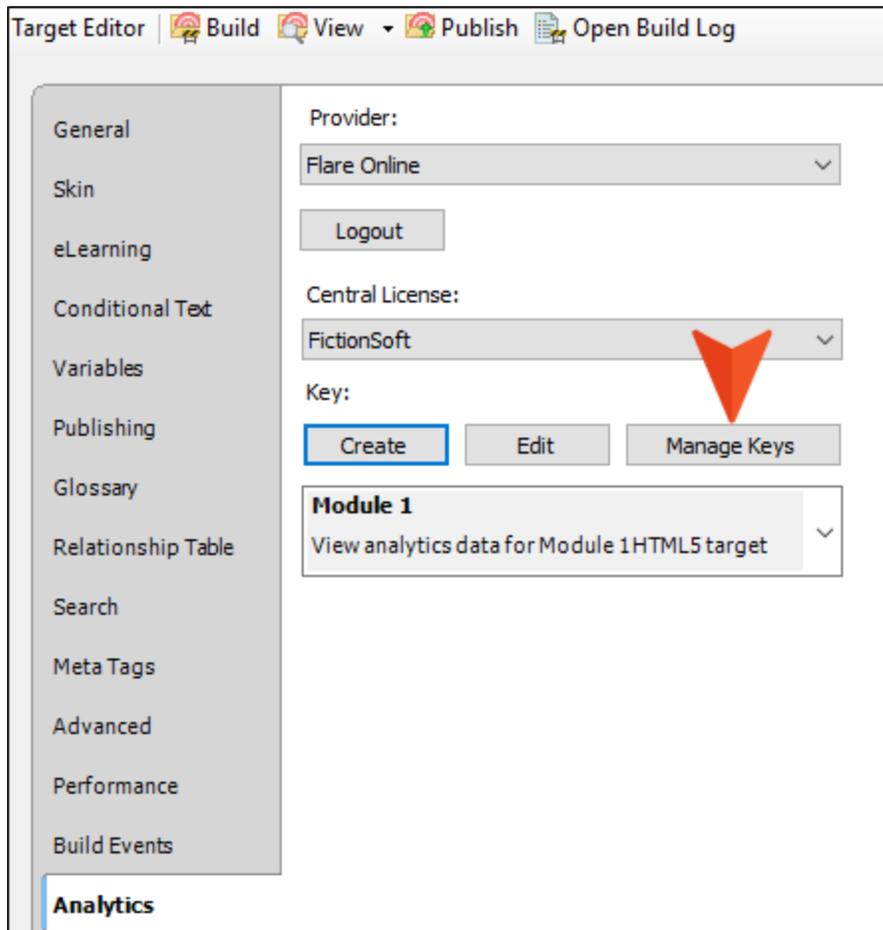
If you create a key in Flare Desktop, it will become associated with your HTML5 target as you do this. But if you create the key in Flare Online, you need to then open the target and associate that key with it.

## How to Associate an Analytics Key With a Target

1. Open an HTML5 target.
2. Select the **Analytics** tab.
3. From the **Provider** field, select **Flare Online**.
4. If you are not yet logged in to Flare Online, click **Login**. Then complete the fields in the dialog and click **OK**.
5. From the **Flare Online License** field, choose your license.
6. At the bottom of the **Key** area, click the drop-down and select the name of the key.
7. Click  to save your work.
8. Build output for the target and publish it to see the analytics results.

# Managing Analytics Keys

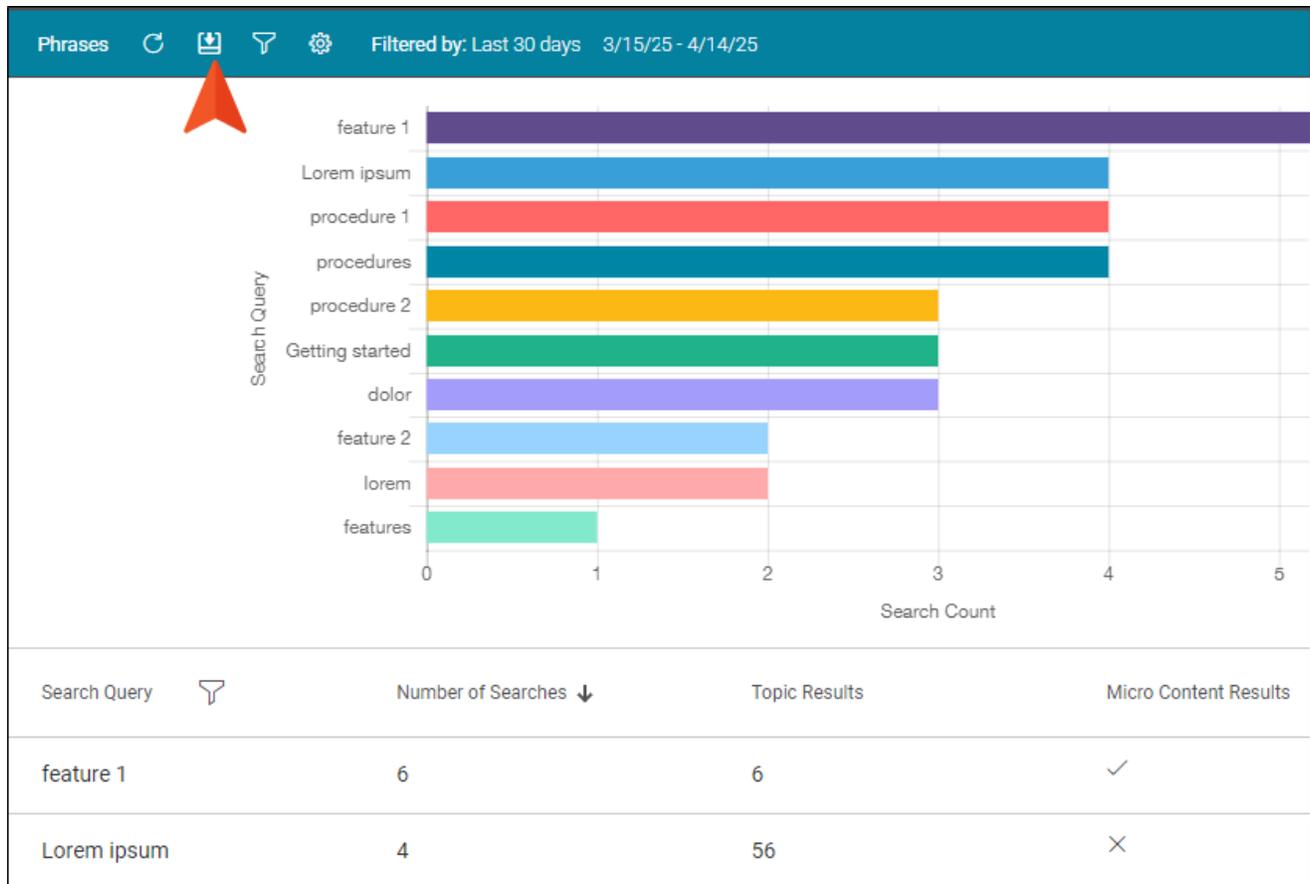
You can click **Manage Keys** in the Flare target.



This opens the Analytics page in Flare Online. From here, you can create and edit keys, as well as delete any that you no longer need.

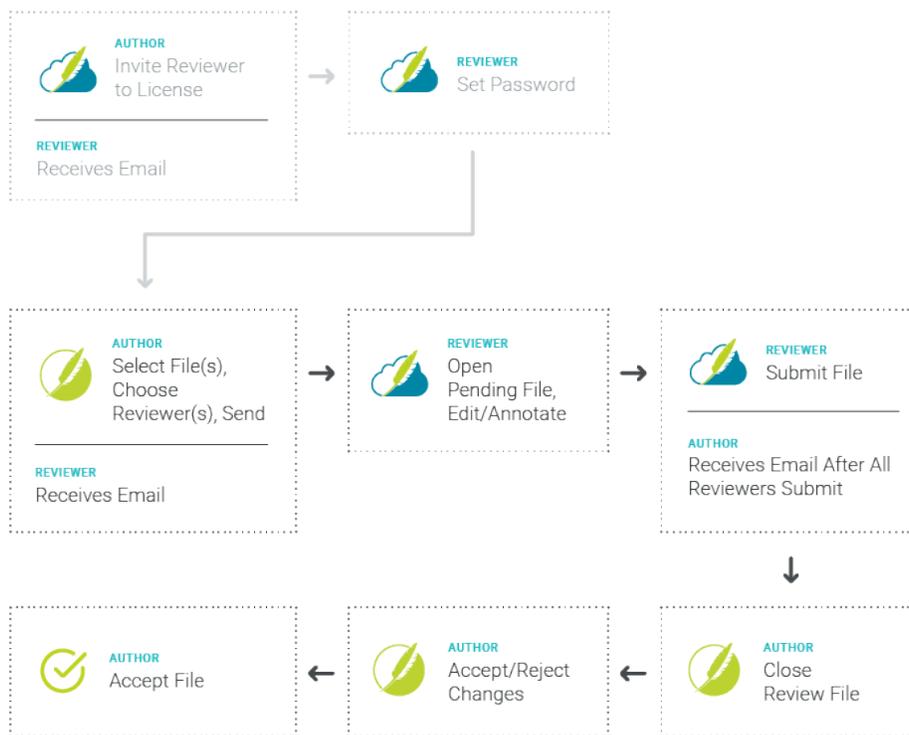
# Downloading Analytics

In the toolbar of the Analytics page, you can click  to download the data to a comma-separated value (CSV) file.



# Flare Online Review Process

Flare Desktop supports review packages (i.e., bundling files such as topics and snippets) and lets you send those packages to Flare Online to be reviewed by others. After editing and annotating the files in Flare Online's Review Editor, the reviewers submit the finished files, sending them back to your inbox in Flare Desktop. You can then accept or reject their changes and accept the file, replacing the original source file.



This chapter discusses the following:

Workflow .....	120
Benefits .....	132
What's Noteworthy? .....	133
Sending Files for Review in Flare Online .....	134
Closing Flare Online Review Files .....	143
Accepting or Rejecting Tracked Changes (Flare Online Reviews) ....	147
Accepting Reviewed Files .....	151

# I Workflow

1. **Owner** In Flare Online, 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** In Flare Desktop, switch to the appropriate branch (if necessary), select **Review > Send For Review**. The first screen of the Send Files for Review Wizard opens.
  - a. In the **Review Package Name** field, enter a name.
  - b. (Optional) Enter a description for the review package.
  - c. (Optional) Add or remove files for the package.
  - d. (Optional) The TOC drop-down defaults to **(none)**. To associate files within a review package to a TOC in the project, select a TOC.
  - e. Click **Next**.

Send for Review | File Reviews | Import Review Package | Review Packages | Track Changes | Accept Change | Reject Change | Changes | Previous Change | Next Change | Insert Annotation | Delete Annotation

### Send Files for Review Wizard

**Send Files for Review...**  
Select files to send for review...

Review Package Name: Enterprise-Intro

Review Package Description: Introduction topics for the enterprise project.

Files:

Name	Folder
Getting-Started...	Content/A-Introduction...
More-Informat...	Content/A-Introduction...
Whats-New.htm	Content/A-Introduction...

TOC: (none)

< Back | Next > | Send | Close

**Annotations:**

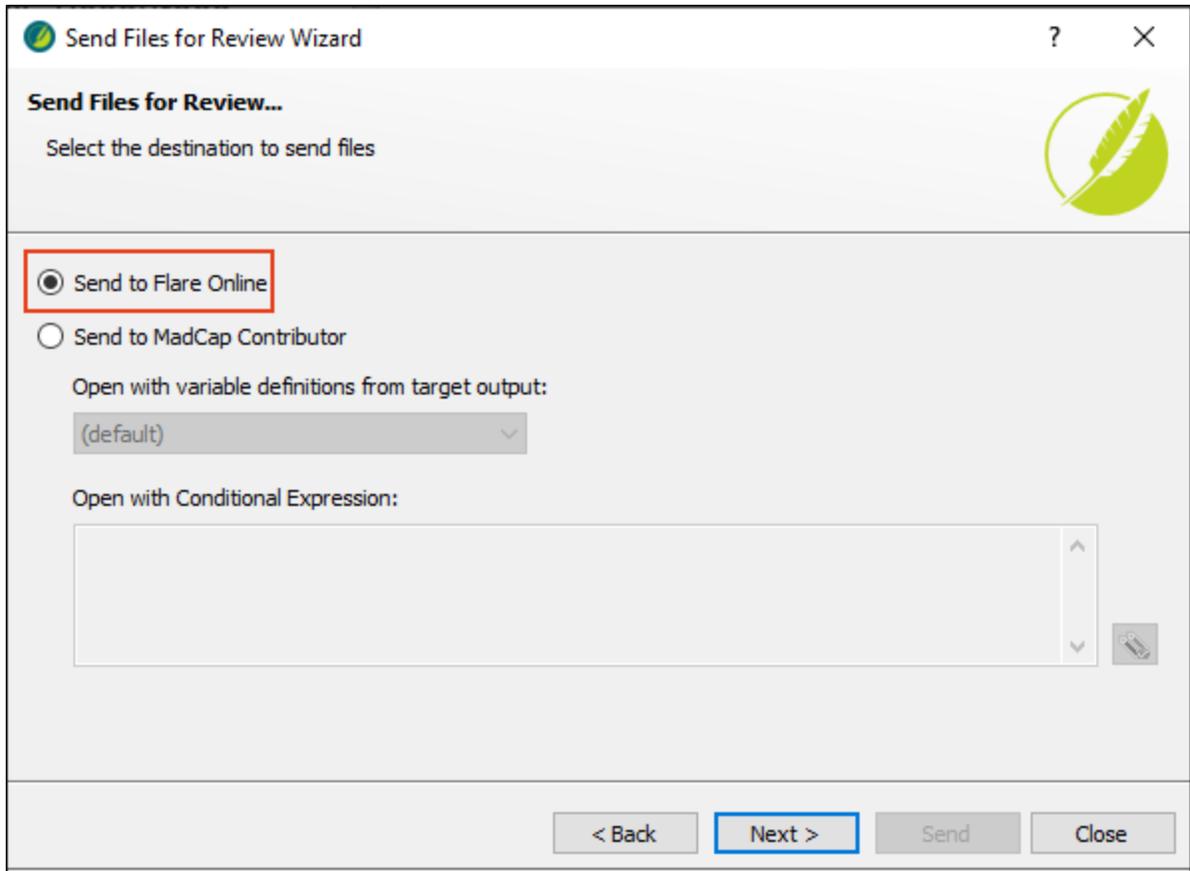
- TOC picker. Opt to select a TOC. (points to Content Explorer)
- Add or remove files using these buttons. (points to + and - buttons)

✔ **TIP** All snippets that are part of a topic will initially be included in the review. However, when sending files for review from Flare Desktop, you can remove any snippets from the File grid to exclude them from the review. You might choose to exclude some (or all) snippets from the review if you think it will be too confusing and too many files for your reviewers. If you exclude snippets, they will still be visible in the topic in Flare Online, but the snippets will be read-only. Therefore, reviewers won't be able to make edits in the snippets, but in the topic they can insert annotations (comments) around the snippets in order to provide feedback.

📄 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When you send files for review, they will be associated with that branch.

In Flare Online, reviewers can determine which branch a file is from. Reviewers do not need to do anything special to make edits or comments in the files.

4. **Owner** Select **Send to Flare Online** (if not already selected), and click **Next**.



 **NOTE** If necessary, Flare Desktop also prompts you to commit and synchronize any changes in your project with Flare Online before you can proceed to the next page of the wizard.

5. **Owner** (Optional) Select reviewers for the review package, and click **Send**. The wizard closes and a prompt alerts you that the files have been sent to Flare Online, click **OK**.

The owner can choose reviewers of different seat types, such as authors and SMEs. Anyone selected during this process automatically becomes associated with the project in Flare Online, and becomes an assigned reviewer for all files chosen in the wizard.

**Send Files for Review Wizard** [?] [X]

**Send Files for Review...**

(Optional) Select users to review the files

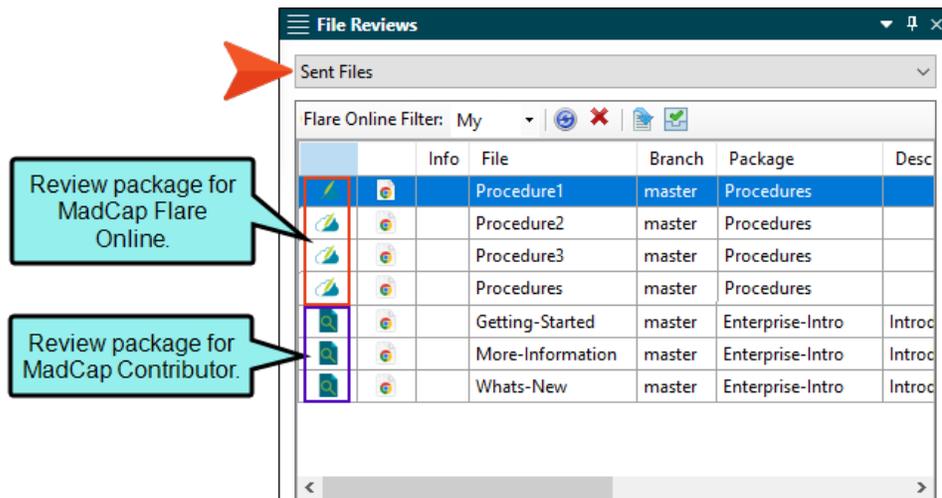
Branch: master

Reviewers

	Avatar	Name	Email	
<input checked="" type="checkbox"/>		Paul Stoecklein	pstoecklein@...	
<input type="checkbox"/>	LM	Laura Martin	lmartin@madc...	
<input checked="" type="checkbox"/>		Lloyd Dobler	ldobler@ahem....	
<input checked="" type="checkbox"/>		Jeff Lebowski	jlebowski@ah...	
<input type="checkbox"/>		Beatrix Kiddo	bkiddo@ahem....	
<input type="checkbox"/>		Minny Jackson	mjackson@ah...	
<input type="checkbox"/>		Marge Gunders...	mgunderson@...	
<input type="checkbox"/>		Ella Fitzgerald	efitzgerald@ah...	
<input type="checkbox"/>		John Harkins	jharkins@mad...	

After the review package is uploaded, reviewers receive an email notification with a link to open the Reviews page in Flare Online. (SMEs automatically receive email notifications, but Flare authors must have the review notifications and email option enabled in Flare Online to receive emails.)

In File Reviews, the review package files display in the Sent Files area. This means the files are in an “Open” state, pending review.



**NOTE** If you attempt to edit a file that has been sent out for review and is still in an “Open” state, a warning displays. You can edit the file, but you may have conflicts with the version of the file being reviewed. As an alternative to editing the file in Flare Desktop, you can edit it in Flare Online along with your reviewers until it is finished.

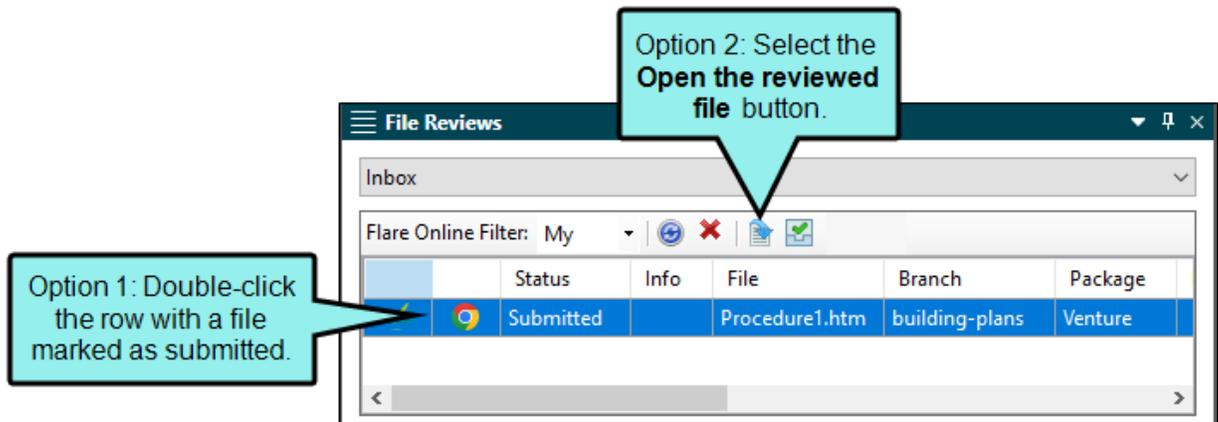
- Reviewer** In Flare Online, open the Reviews page. Click each file associated with the pending review package and edit or annotate it using the Review Editor, and click **Submit**.

The reviewer is done submitting once all the files in the queue are complete. This moves the review package to the Submitted pane. Files can be viewed from there and edited still, but once the owner closes the file, it can no longer be edited in Flare Online.

After all of the reviewers submit the file(s), the owner receives an email notification (if notifications are enabled in Flare Online) and the file(s) displays in the File Reviews Inbox in Flare Desktop.

 **NOTE** If the owner of a review package makes edits to the files in Flare Online they will not typically see a Submit button.

7. **Owner** After reviewed files are individually submitted from Flare Online, open Flare Desktop. Select **Review > File Reviews**. You can look at files as they come in; you do not have to wait for all the files in a review package in order to preview them.
8. **Owner** From the File Reviews Inbox area double-click a submitted file. (Or, select a file, and from the local toolbar, click **Open the reviewed file** .)

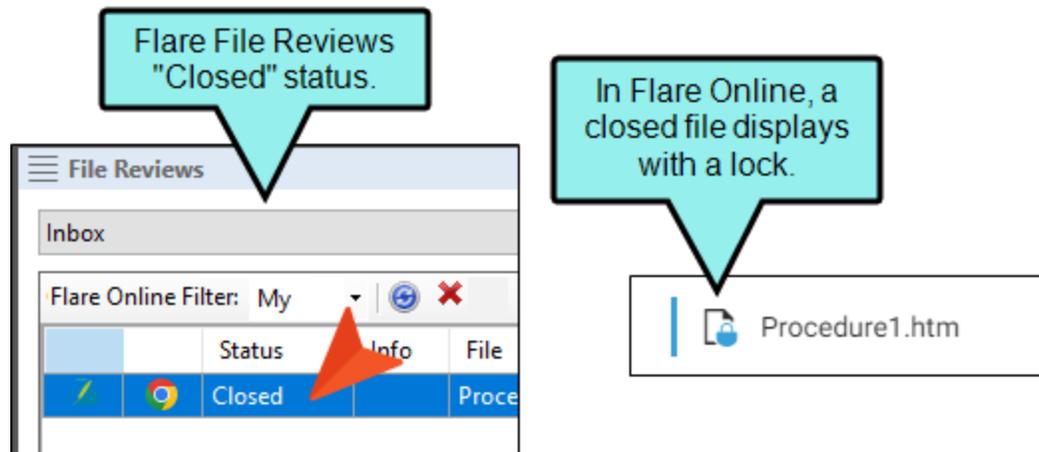


 **NOTE** The Inbox displays files from all relevant branches (if you are using Git branching). You should switch to the matching branch before managing the tracked changes and accepting the file back into Flare Desktop.

 **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** When you click to open and preview a file, a dialog displays asking if you want to move the files to a closed state. Select **Yes** or **No**.

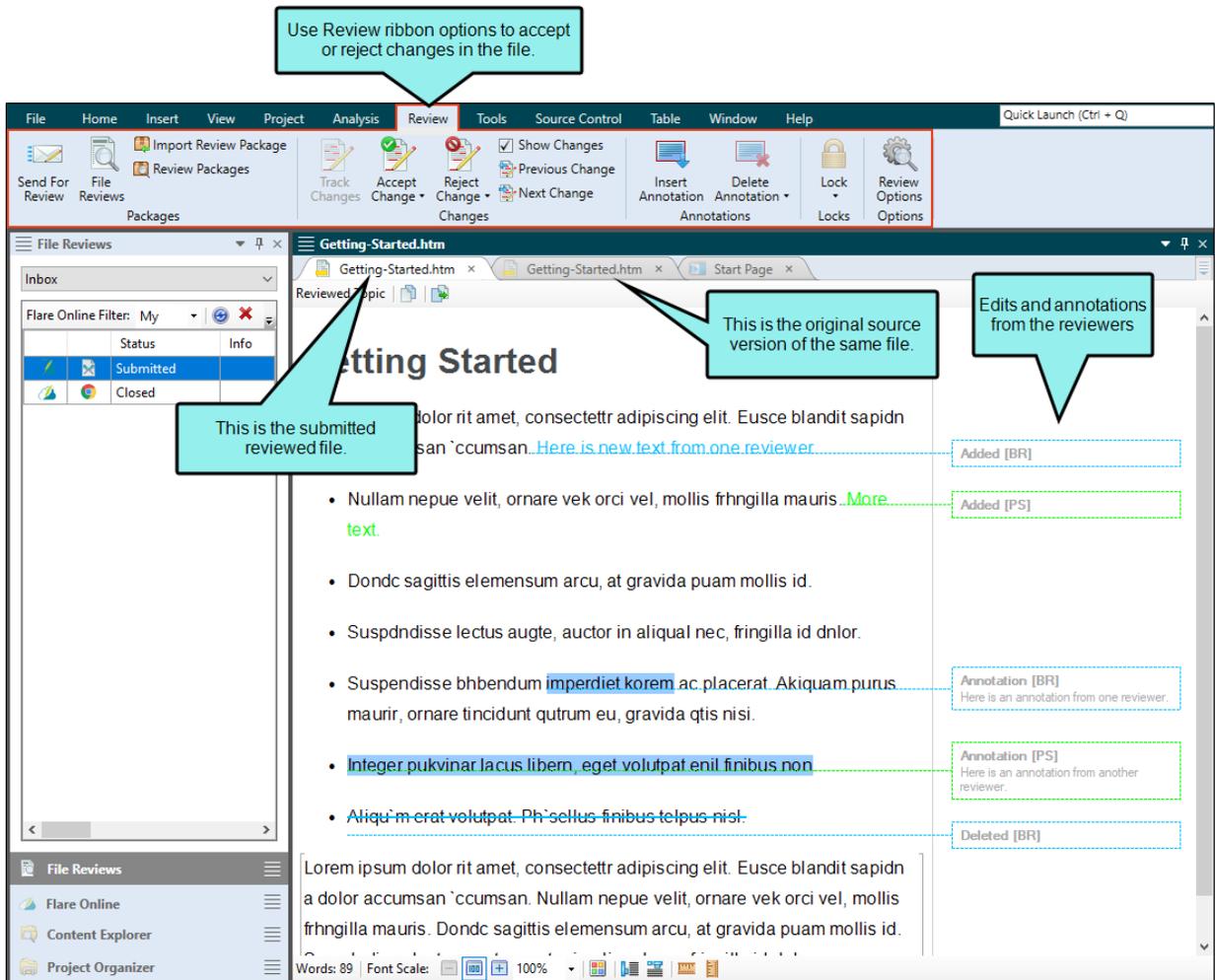
- **Yes** The file switches to a closed state in the Inbox and opens in the editor. No more editing can occur in Flare Online while the owner reviews it. In Flare Online, when a file is closed, a lock symbol appears next to the file.



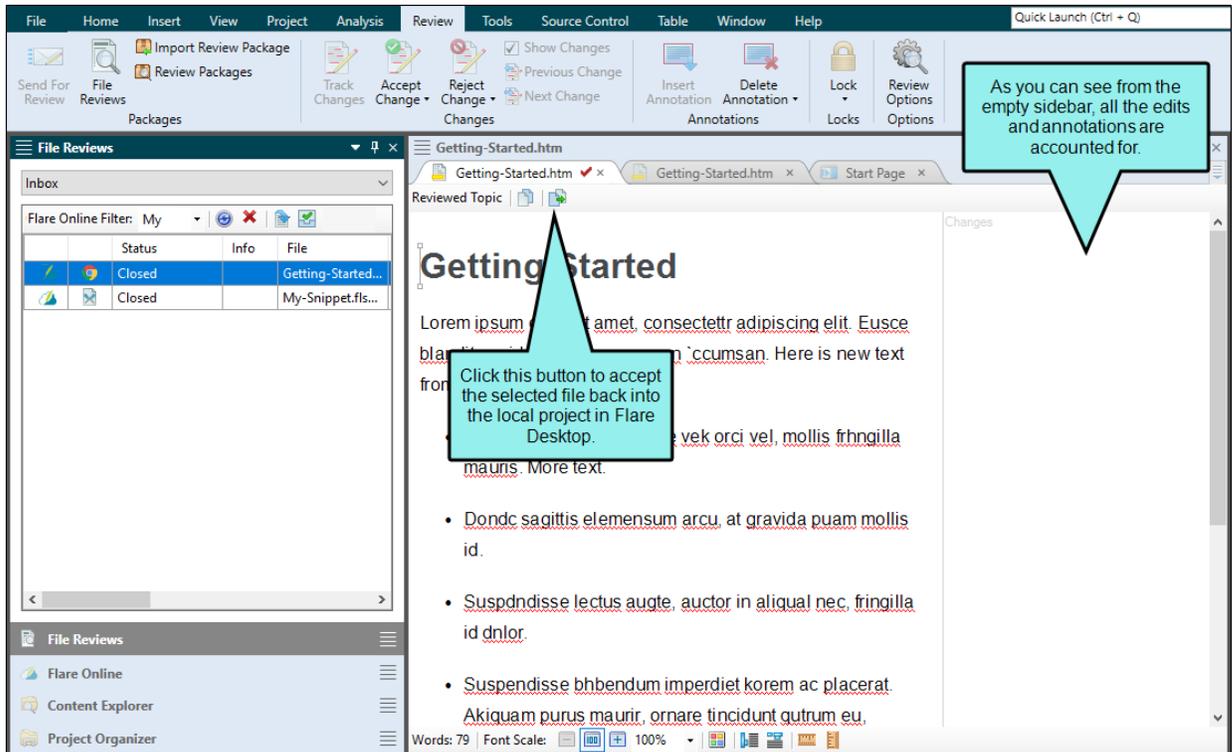
- **No** The owner can preview the file in Flare Desktop—as a read-only file. The reviewer(s) can still make changes to the file in Flare Online until the owner closes the file in Flare Desktop. The file stays in a submitted state in the Inbox, and it opens in the editor.

**NOTE** The advantage of this is that you can see raw edits before the reviewer is done—without having to close the file and resend it from Flare Desktop. When you are ready to close out the file from further editing, double-click the submitted file and select **Yes** from the prompt.

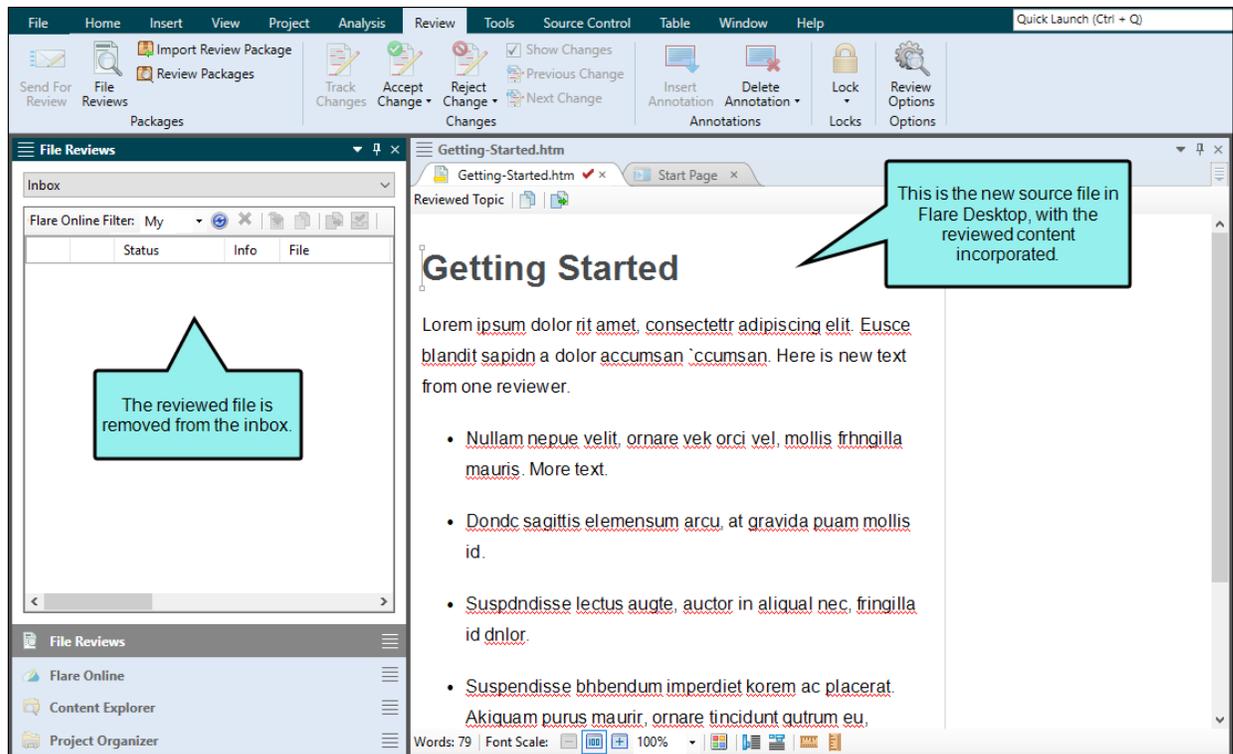
10. Owner In Flare Desktop, accept and/or reject the reviewer's changes in the editor.



11. **Owner** In the toolbar in Flare Desktop, click the **Accept** button.



The file is then removed from the Inbox.



# I Benefits

Benefits of this review workflow include:

- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple reviewers (e.g., SMEs, authors) can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version of the editor means a streamlined interface. You only see options and features that are relevant to the review process.
- **Auto-Save and Tracking** Changes in the editor are auto-saved as you work. In addition, all changes are automatically tracked so the owner can easily locate edits for approval or rejection.
- **Branching** Files can be sent for review from a specific Git branch. This lets you keep reviews limited to files that are still in a state of development, as opposed to finished and ready for publication.
- **Workflow Management** Bundling files into review packages favorably services everyone in the review process workflow. Reviewers (e.g., SMEs) can edit and view content from a flat file list or from a contextual TOC view where files display in a TOC for output that an end user might see. Owners (e.g., authors) can edit but they can also monitor and manage reviews in Flare Online. They have access to customizable package and file grids that show review information and progress.

# I What's Noteworthy?

 **NOTE** If you are using Git branching, you can send review packages from a particular branch; this way, reviewers can look at content that is in a state of development, as opposed to content that is considered completed and published.

 **NOTE** For the review process, keep in mind that review packages are sent up, and files come down. In other words, owners are sending review packages up to Flare Online, and then reviewers are submitting individual files back down to Flare Desktop. Once all package files are accepted into Flare Desktop, the review package is closed.

# I Sending Files for Review in Flare Online

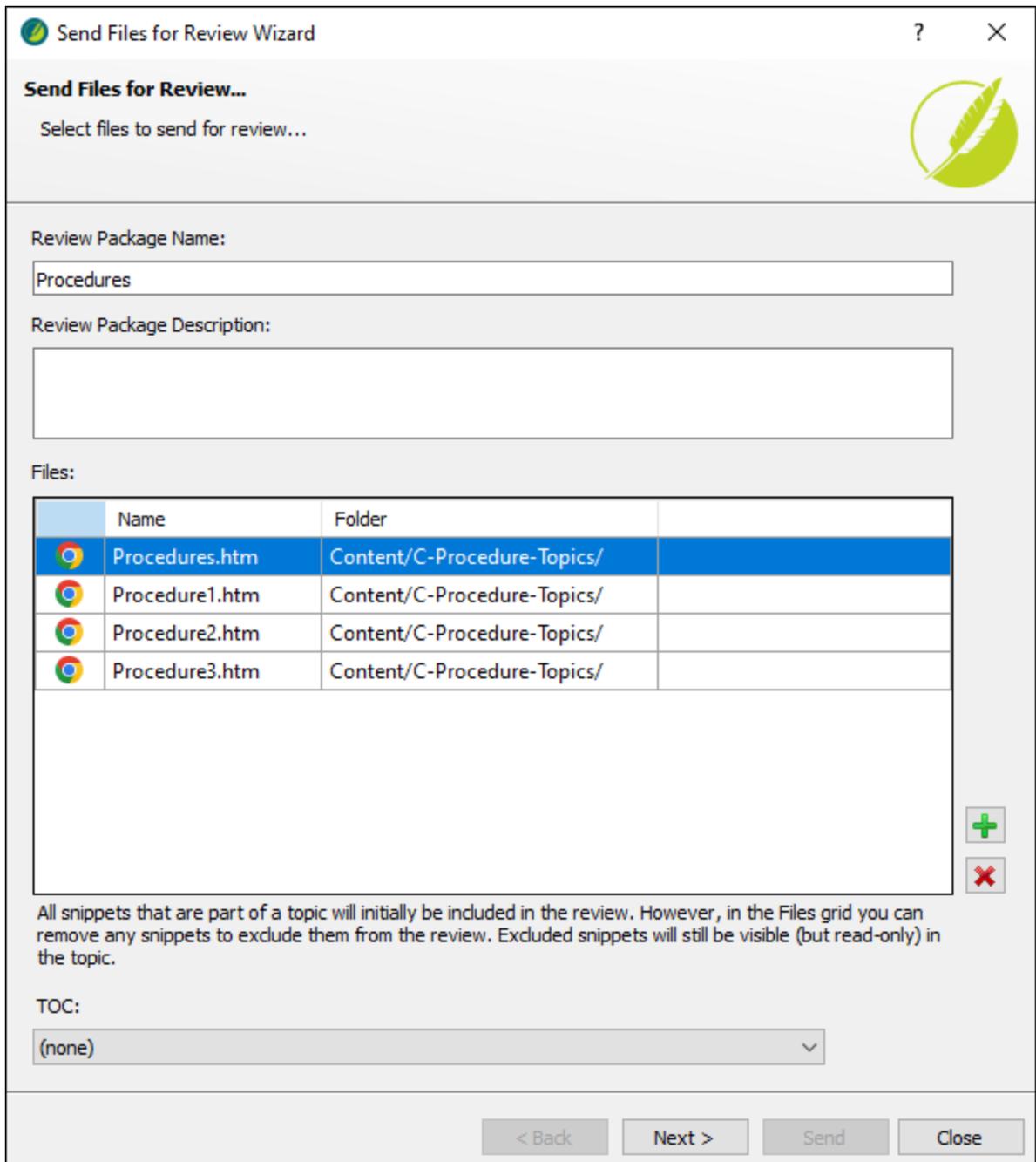
The following are steps for sending files to others for review in Flare Online.

## How to Send Files for Review in Flare Online

1. If you have not already done so, open the Flare Online window pane in Flare Desktop (**View > Flare Online**) and log in to Flare Online. See "Logging In and Out" on page 83.
2. If you are using Git branching, make sure the appropriate branch is active. When you send files for review, they will be associated with that branch.
3. From the Content Explorer, select a file for review (e.g., topics, snippets). (From the local toolbar, you can **Toggle Show Files** to select multiple files at once.)

 **NOTE** You can also send files for review using the TOC Editor. The advantage to this is that the TOC node is automatically bundled with the files. This allows reviewers in Flare Online to see content in a TOC view for better context. From the TOC Editor, select the folder(s) or file(s), right-click and select **Send for Review**. (Alternatively, from the TOCs local toolbar you can select **Send for Review**.)

4. Select **Review > Send for Review**. The Send Files for Review Wizard opens.



5. (Optional) If you want to add more files to the package, do the following:

- a. Click .
- b. Use the multi-view buttons to find the file(s) you want to add. If you want to add multiple files, make sure  is selected.

Option	Description
	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.
	Shows or hides hidden files and folders.
	If the Show Files button  is the only one selected, you can click this button to move up one folder level.

- c. Find and select the file(s) you want to add to the review. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items. When you are finished click **Open** in the dialog.

 **TIP** All snippets that are part of a topic will initially be included in the review. However, when sending files for review from Flare Desktop, you can remove any snippets from the File grid to exclude them from the review. You might choose to exclude some (or all) snippets from the review if you think it will be too confusing and too many files for your reviewers. If you exclude snippets, they will still be visible in the topic in Flare Online, but the snippets will be read-only. Therefore, reviewers won't be able to make edits in the snippets, but in the topic they can insert annotations (comments) around the snippets in order to provide feedback.

6. (Optional) When sending files from the ribbon, the Send Files for Review Wizard TOC field defaults to (none). You can still associate a TOC with the review files. From the **TOC** drop-down, select a TOC.
7. Click **Next**.
8. Select **Send to Flare Online**. Click **Next**.



**NOTE** If necessary, Flare Desktop also prompts you to commit and synchronize any changes in your project with Flare Online before you can proceed to the next page of the wizard.

9. (Optional) Select reviewers on your Flare Online license who you want to review the package. Anyone selected automatically becomes associated with that project in Flare Online, and becomes an assigned reviewer for all files chosen in the wizard.

Send Files for Review Wizard

**Send Files for Review...**  
(Optional) Select users to review the files

Branch: master

Reviewers

	Avatar	Name	Email
<input checked="" type="checkbox"/>		Paul Stoecklein	pstoecklein@...
<input type="checkbox"/>	LM	Laura Martin	lmartin@madc...
<input checked="" type="checkbox"/>		Lloyd Dobler	ldobler@ahem...
<input checked="" type="checkbox"/>		Jeff Lebowski	jlebowski@ah...
<input type="checkbox"/>		Beatrix Kiddo	bkiddo@ahem...
<input type="checkbox"/>		Minny Jackson	mjackson@ah...
<input type="checkbox"/>		Marge Gundersen...	mgunderson@...
<input type="checkbox"/>		Ella Fitzgerald	efitzgerald@ah...
<input type="checkbox"/>		John Harkins	jharkins@mad...

< Back   Next >   **Send**   Cancel

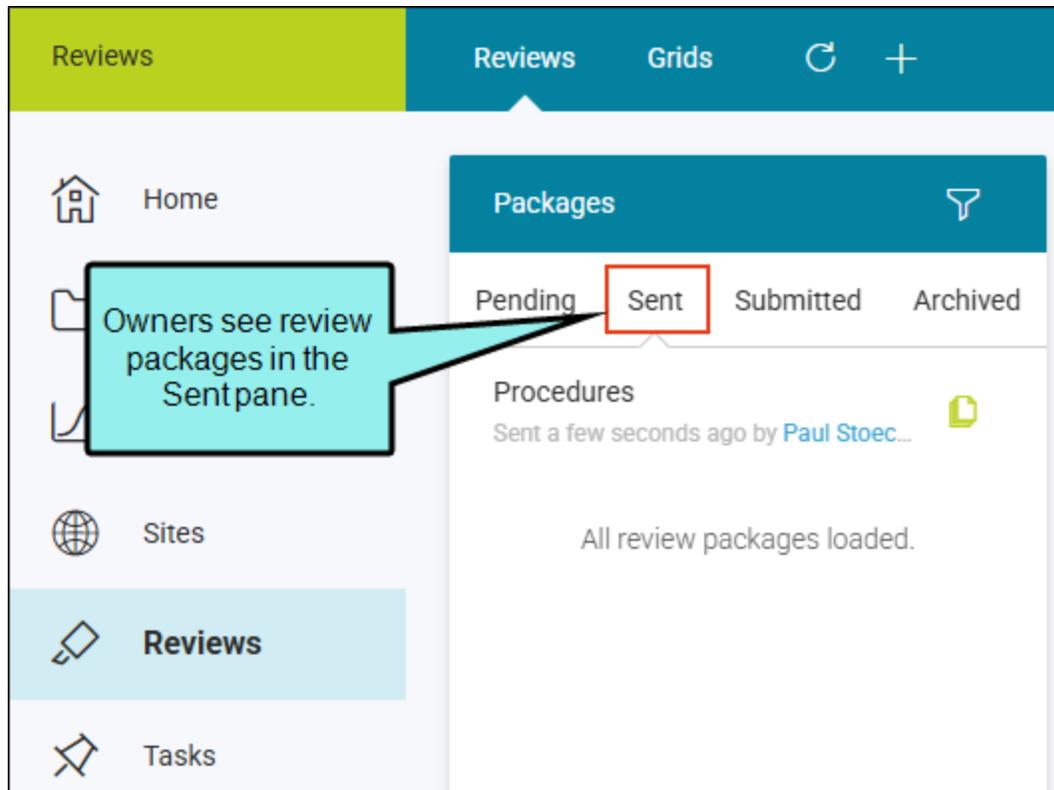
**NOTE** You can select users who are active on the Flare Online license, and those who are still in the "Invited" status (i.e., those users have not yet set up a profile to become active users). After invited users are active, they will receive review notifications and see all files sent to them for review.

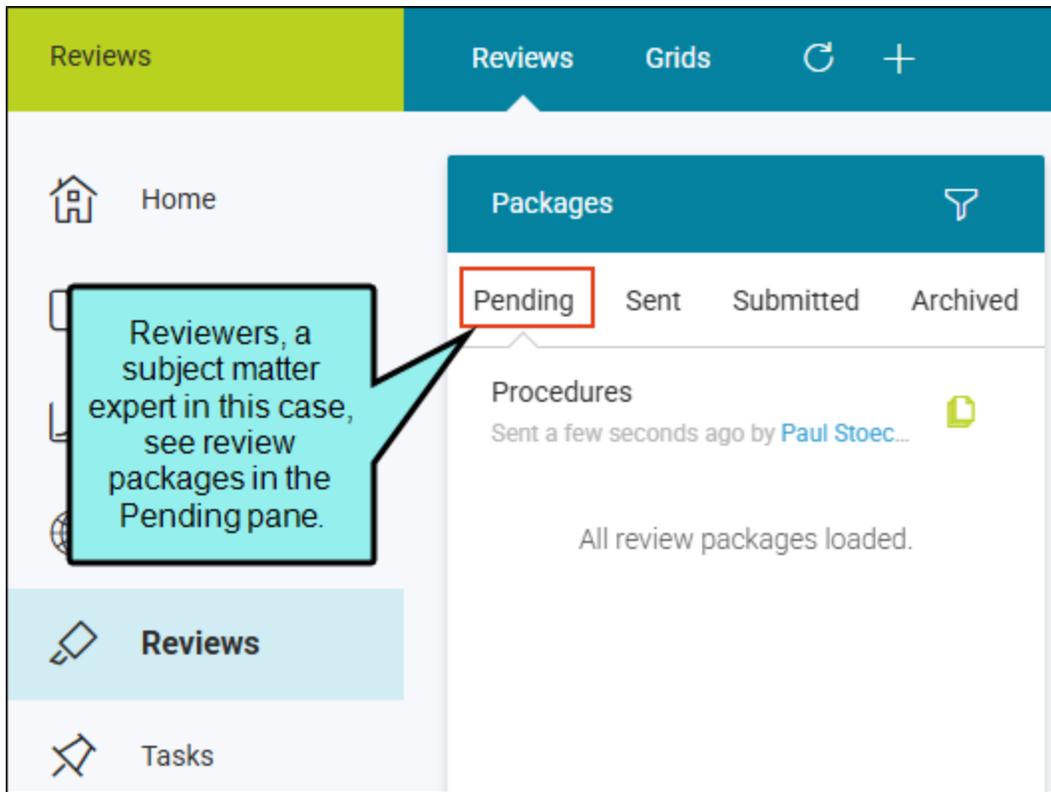
10. Click **Send**.

**Flare Online Side** After the review package is uploaded, reviewers receive an email notification with a link to open the Reviews page in Flare Online. (SMEs automatically receive

email notifications, but Flare authors must have the review notifications and email option enabled in Flare Online to receive emails.)

If you are the owner, review packages are listed in the Sent pane. If you are a reviewer, the review packages are listed in the Pending pane.





**Flare Desktop Side** In File Reviews, the review package files display in the Sent Files area. This means the files are in an “Open” state, pending review.

**File Reviews**

Sent Files

Flare Online Filter: My

	Info	File	Branch	Package	Desc
		Procedure1	master	Procedures	
		Procedure2	master	Procedures	
		Procedure3	master	Procedures	
		Procedures	master	Procedures	
		Getting-Started	master	Enterprise-Intro	Introc
		More-Information	master	Enterprise-Intro	Introc
		Whats-New	master	Enterprise-Intro	Introc

Review package for MadCap Flare Online.

Review package for MadCap Contributor.



**NOTE** If you attempt to edit a file that has been sent out for review and is still in an “Open” state, a warning displays. You can edit the file, but you may have conflicts with the version of the file being reviewed. As an alternative to editing the file in Flare Desktop, you can edit it in Flare Online along with your reviewers until it is finished.

# Closing Flare Online Review Files

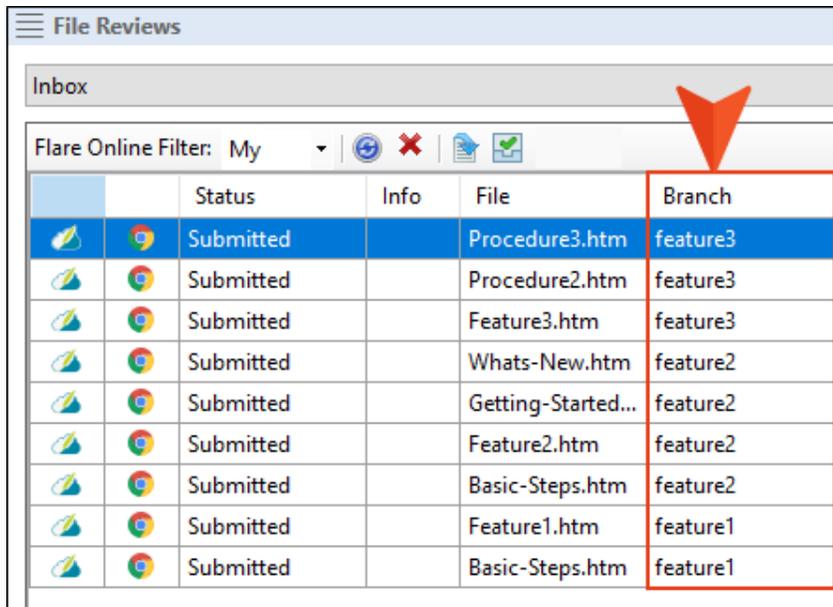
After all reviewers submit a file in Flare Online, the author can close out the review process for that file in Flare Desktop's File Reviews window pane.

## How to Close the Review Process for Files

1. Select **Review > File Reviews**. The File Reviews window pane opens.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When closing the review process for files, dealing with tracked changes, and accepting the file back into the project, you want to be working in the correct branch so that the file changes are not applied in the incorrect branch.

In the File Reviews window pane, you can see which branch a file originates from.



	Status	Info	File	Branch
	Submitted		Procedure3.htm	feature3
	Submitted		Procedure2.htm	feature3
	Submitted		Feature3.htm	feature3
	Submitted		Whats-New.htm	feature2
	Submitted		Getting-Started...	feature2
	Submitted		Feature2.htm	feature2
	Submitted		Basic-Steps.htm	feature2
	Submitted		Feature1.htm	feature1
	Submitted		Basic-Steps.htm	feature1

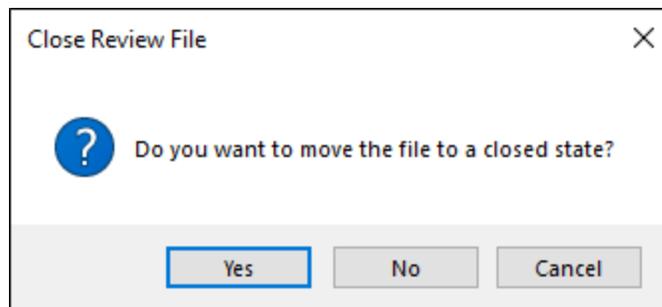
- From the drop-down at the top of the window pane, select **Inbox**. The files that need to be closed have a status of Submitted. The Inbox shows files that have not been accepted.

 **NOTE** Technically, you can select **Sent Files** in the drop-down and close files from there. However, these are files that reviewers have not yet finished in Flare Online. So if you close the review process for these files, they can no longer be edited in Flare Online. You might close the review process for a file from Sent Files, for example, if a particular reviewer leaves the company and is unable to finish editing the file in Flare Online.

- (Optional) By default, the **Flare Online Filter** field in the local toolbar is set to **My**, which means you see only files that you have initiated the review process. You can change the setting to **All** if you need to see files initiated by other authors in the Flare project. This option is useful if the original author is unavailable to close out the review process.
- Do one of the following:

#### TO CLOSE REVIEW PROCESS FOR A SINGLE FILE

- Do one of the following:
  - Double-click a submitted file. A dialog displays asking if you want to move the files to a closed state. Select **Yes**.



- Select the file in the grid and click  in the local toolbar. In the dialog that

displays, click OK.

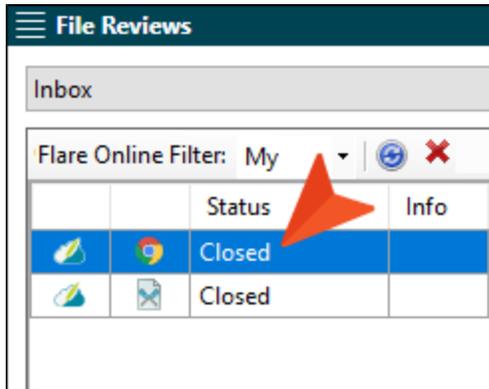
The screenshot shows the 'File Reviews' window. At the top, there is a header 'File Reviews' and a sub-header 'Inbox'. Below this, there is a filter section 'Flare Online Filter: My' with several icons. A table below contains two rows of data. The first row is highlighted in blue and has a callout box pointing to it with the text '1. Select one or more files.' The second row is not highlighted. To the right of the table, there is a callout box pointing to a green checkmark icon with the text '2. Click this button.'

		Status	Info	F	Package
		Submitted			MadCap
		Closed			topic

## TO CLOSE REVIEW PROCESS FOR A MULTIPLE FILES

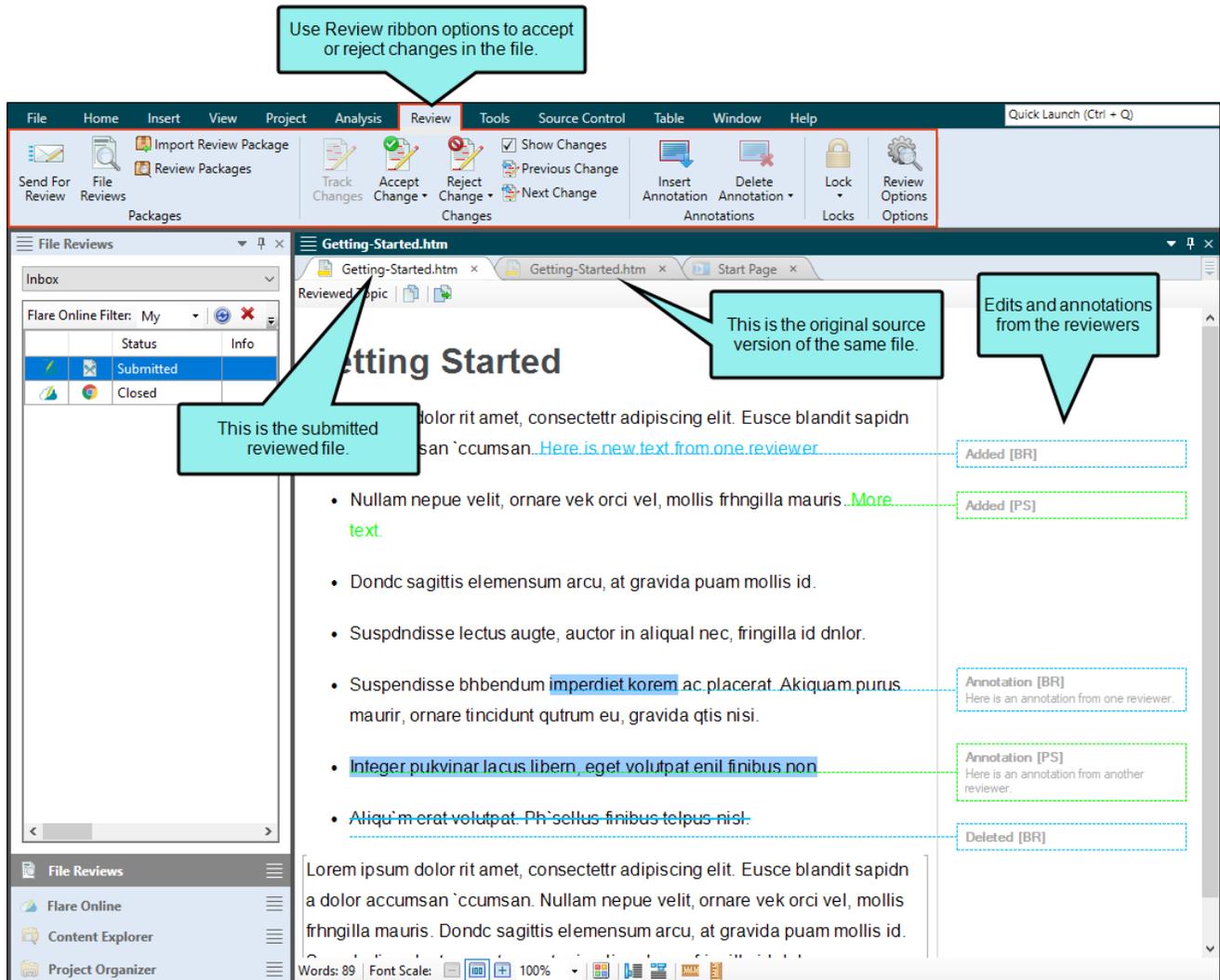
- a. In the grid, select the files. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
- b. In the local toolbar, click .
- c. In the dialog that displays, click **OK**.

After this, the status for the file is changed to Closed in the File Reviews window pane.



# Accepting or Rejecting Tracked Changes (Flare Online Reviews)

After closing the review process in Flare Online for a file, the owner can open the reviewed file in Flare Desktop. Changes can be accepted or rejected as necessary.

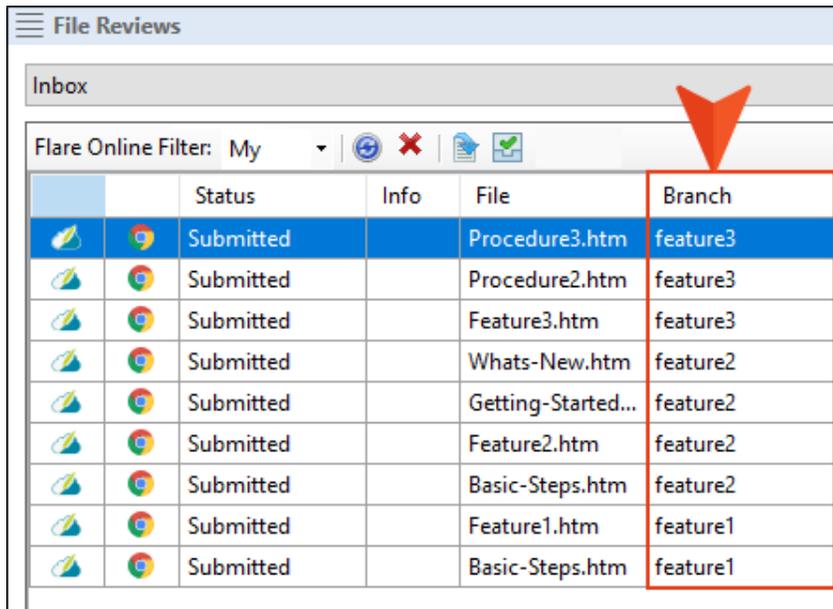


# How to Accept or Reject Tracked Changes

1. Select **Review > File Reviews**. The File Reviews window pane opens.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When closing the review process for files, dealing with tracked changes, and accepting the file back into the project, you want to be working in the correct branch so that the file changes are not applied in the incorrect branch.

In the File Reviews window pane, you can see which branch a file originates from.



	Status	Info	File	Branch
	Submitted		Procedure3.htm	feature3
	Submitted		Procedure2.htm	feature3
	Submitted		Feature3.htm	feature3
	Submitted		Whats-New.htm	feature2
	Submitted		Getting-Started...	feature2
	Submitted		Feature2.htm	feature2
	Submitted		Basic-Steps.htm	feature2
	Submitted		Feature1.htm	feature1
	Submitted		Basic-Steps.htm	feature1

2. From the File Reviews window pane, open the topic or snippet.
3. Make sure you have changes set to be displayed.
4. You can perform any of the following tasks.

## TO ACCEPT ALL CHANGES IN THE FILE

Select **Review > Accept Change > Accept All Changes**.

## TO ACCEPT SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click the change you want to accept, and select **Review > Accept Change**.

OR

- **Right-Click** Right-click the change you want to accept, and from the context menu, select **Accept [Type of Change]**.

## TO REJECT ALL CHANGES IN FILE

Select **Review > Reject Change > Reject All Changes**.

## TO REJECT SINGLE CHANGE

Do one of the following, depending on the part of the user interface you are using:

- **Ribbon** Click the change you want to reject, and select **Review > Reject Change**.

OR

- **Right-Click** Right-click the change you want to reject, and from the context menu, select **Reject [Type of Change]**.

5. Click  to save your work.

 **NOTE** After reviewing annotations in a file, you can delete them if they are no longer needed.

 **NOTE** When you track changes, every change to the document—along with the user who performed the change—will be stored in the document’s markup. You can accept the topic and all changes or accept the topic and maintain the tracked changes in the topic. When all changes in the document are resolved, there is no history of changes, and it is ready for output.

 **NOTE** By default, tracked changes are visible only in the editor in MadCap Flare Desktop, as well as in Flare Online or Contributor (depending on the review method you are using). Tracked changes that have not yet been accepted are not visible when previewing the topic in Flare Desktop or when viewing any output generated from it. You can preserve tracked changes in PDF and Word output so unaccepted changes will appear in these outputs.

# I Accepting Reviewed Files

After an individual submits files that you have sent for review, those files populate the File Reviews Inbox of your Flare project. You can close files, and then view and accept the files into the project. Once all the assigned reviewers submit all the files for a review package, and those files are accepted by the owner, the review package closes automatically. After accepting a file, it overwrites the original source file in your project. Any edits or annotations in the reviewed file become part of the source file.

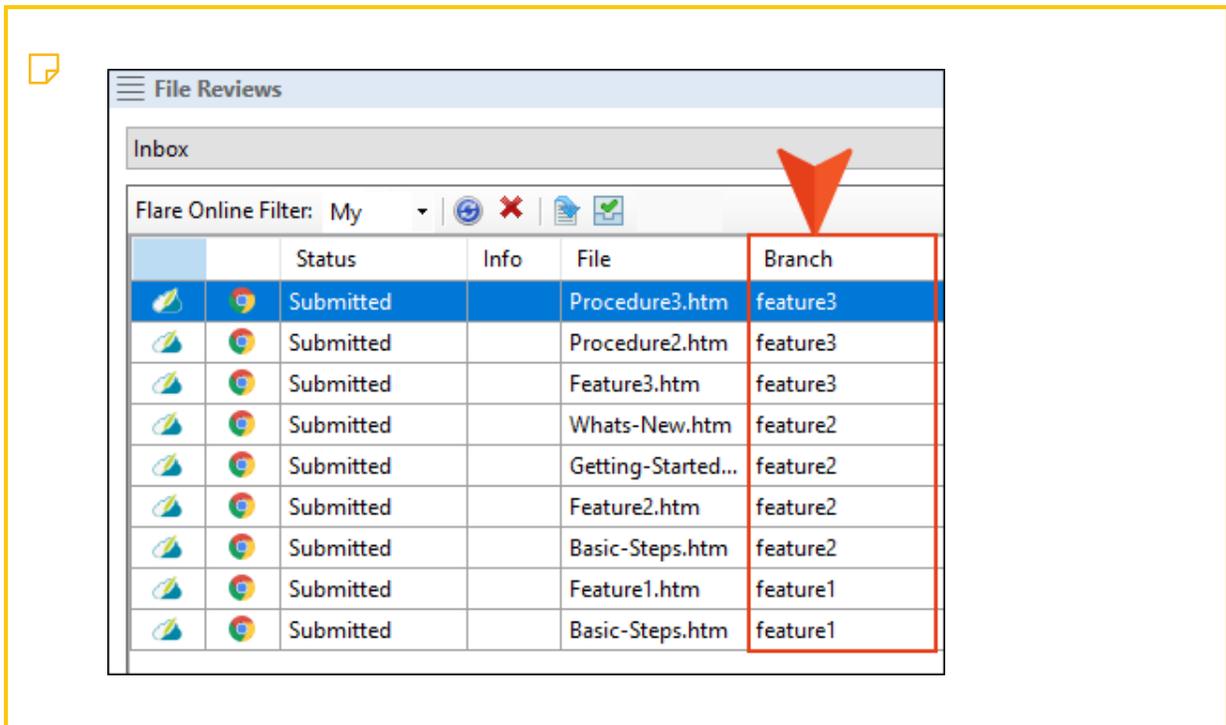
## How to Accept Reviewed Files

1. Select **Review > File Reviews**. The File Reviews window pane opens.
2. From the drop-down at the top of the window pane, select **Inbox**. It lists all the submitted files from the review package, but the files have not yet been accepted.



**NOTE** If you are using Git branching, make sure the appropriate branch is active. When closing the review process for files, dealing with tracked changes, and accepting the file back into the project, you want to be working in the correct branch so that the file changes are not applied in the incorrect branch.

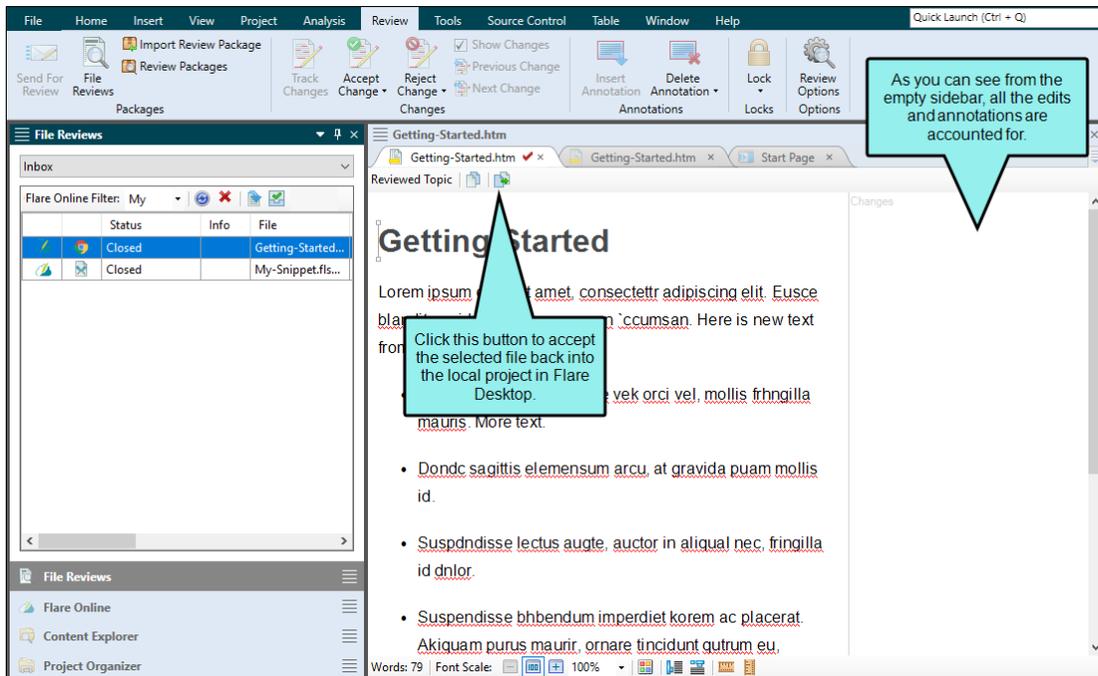
In the File Reviews window pane, you can see which branch a file originates from.



For Flare Online reviews, a file status should be Closed before it is accepted into the project.

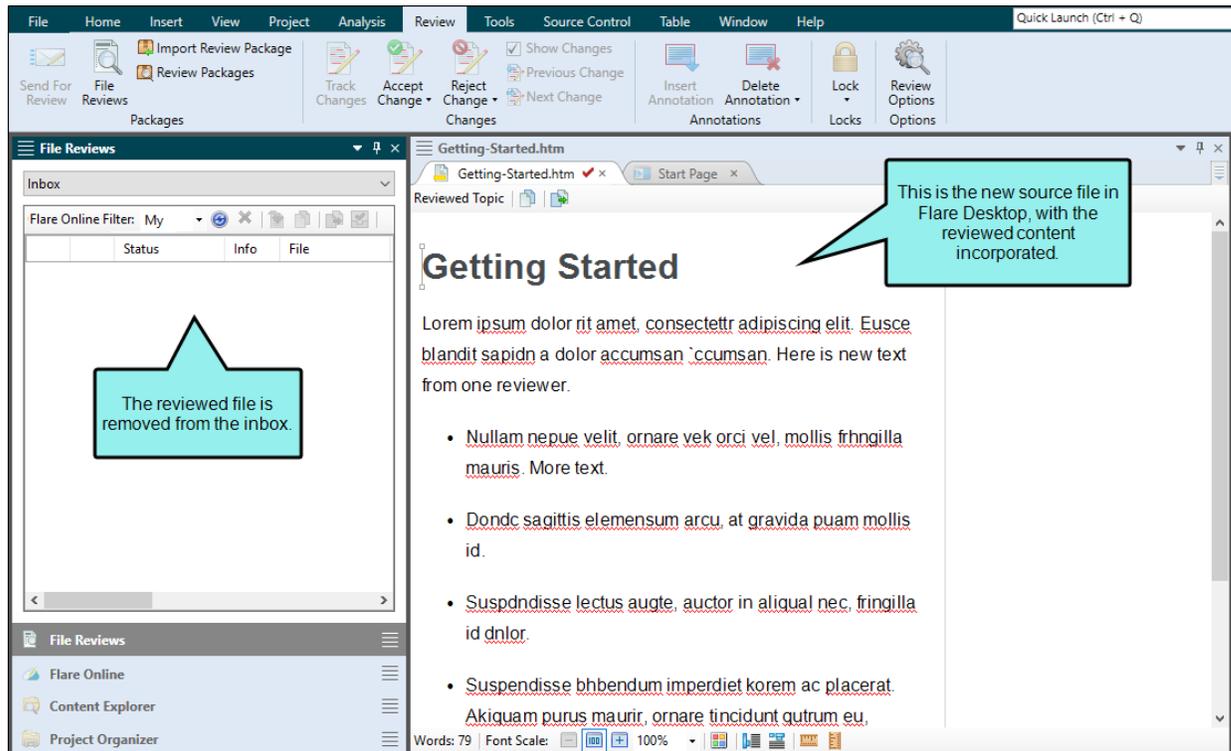
Also, regardless of the process you use (Flare Online or Contributor), make sure you have accepted or rejected the changes as necessary in the files.

3. In the grid, select the file(s) that you want to accept. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
4. In the local toolbar, click .



A message opens (if there are unresolved changes), indicating that the unresolved changes will be accepted if the file is accepted. However, if a conflict exists (e.g., the original file in your project changed since the time you sent it out for review), a dialog opens to let you know of the issue. You can then take the appropriate action; you can merge the changes from the files, keep the edits from the reviewer (undoing your changes), or keep your edits (discarding those from the reviewer).

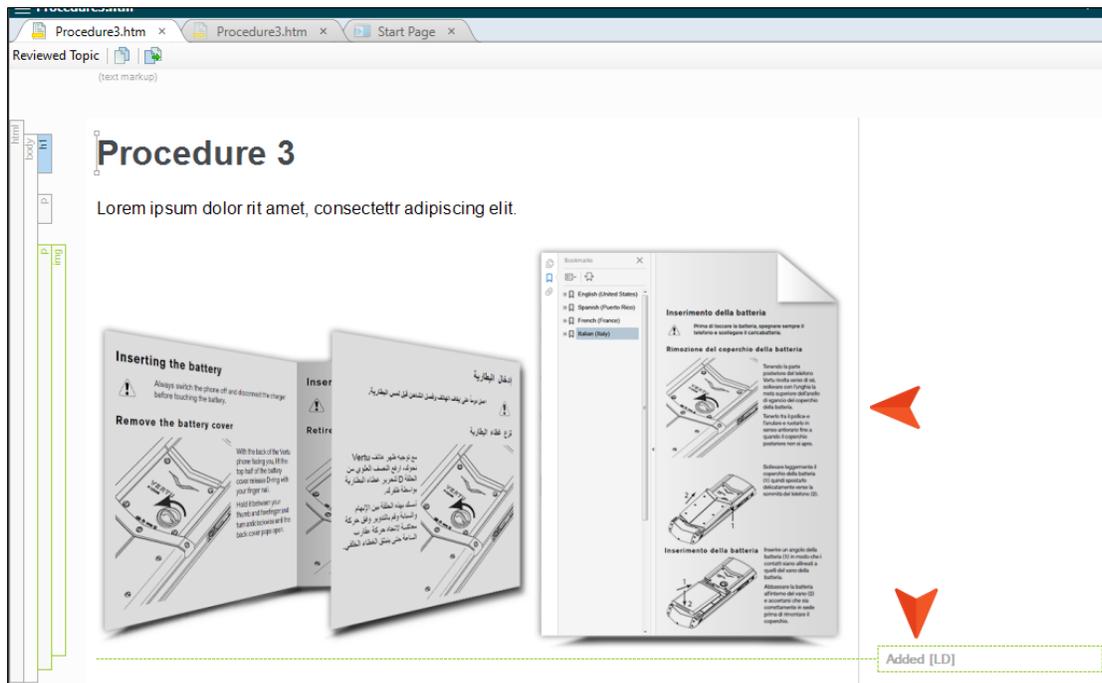
5. Click **OK**. The reviewed file replaces the source file in the project.  
Also, the file is removed from the File Reviews window pane.



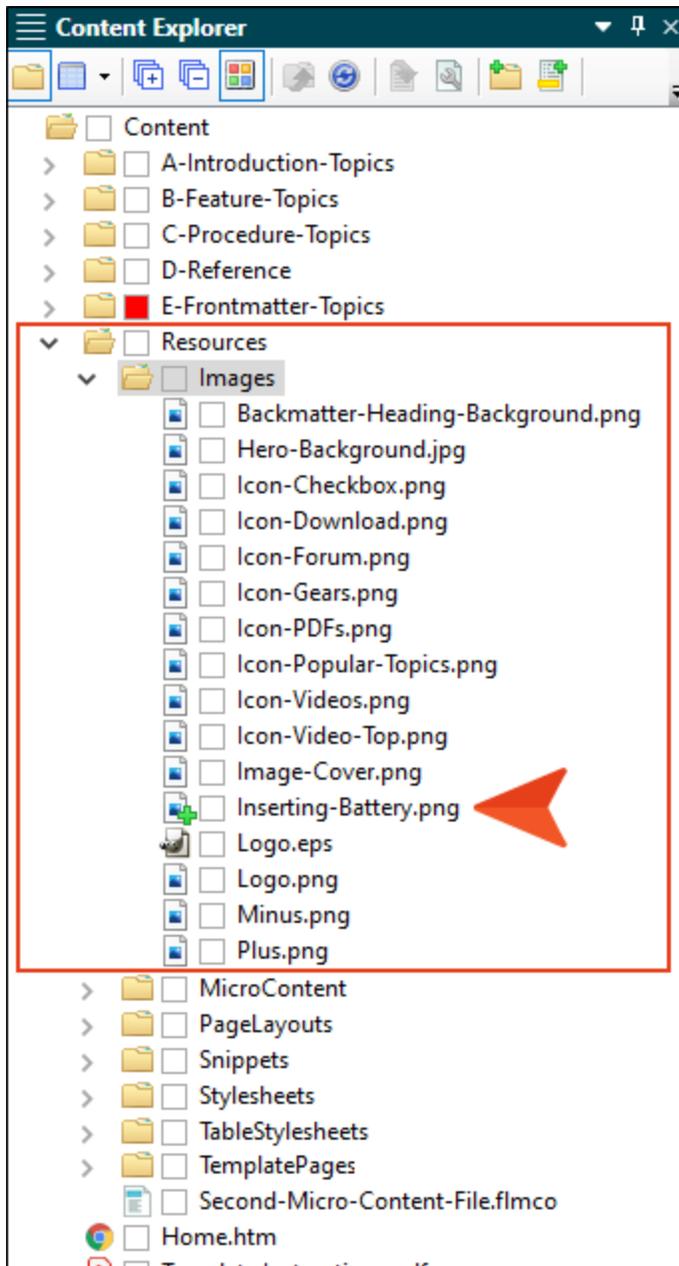
# Images From Flare Online Reviews

If you are using MadCap Flare Online for topic reviews, the files being returned to you might include new images. That's because Flare Online lets reviewers insert images into topics or snippets that they are reviewing.

When you open a reviewed topic or snippet that has been sent back to you, any new images need to be accepted or rejected, just like any other content that reviewers add to the topic or snippet.



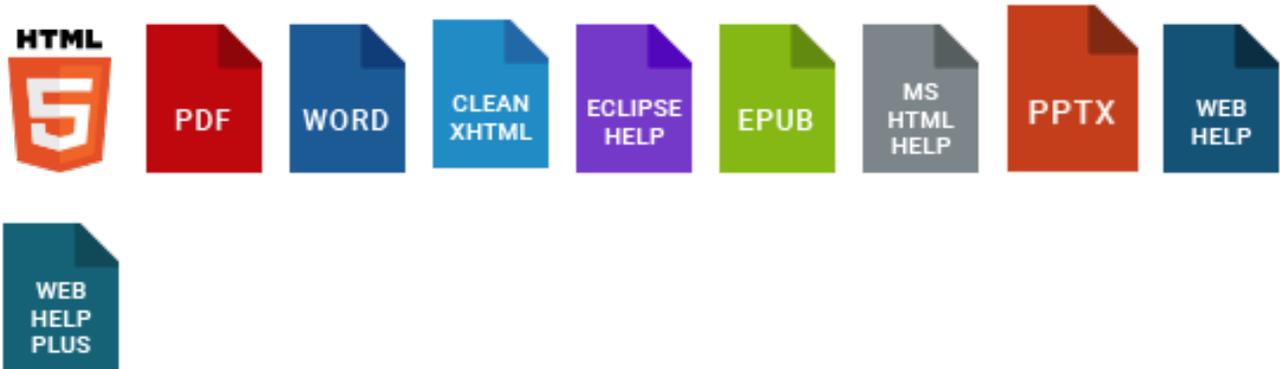
After you accept the reviewed topic or snippet back into your project, and that file includes a new image, that image will automatically be added to your Resources > Images subfolder in the Content Explorer. If you don't already have an Images subfolder, Flare Desktop creates one for you. You can then move the image to another location in the Content Explorer if you wish.



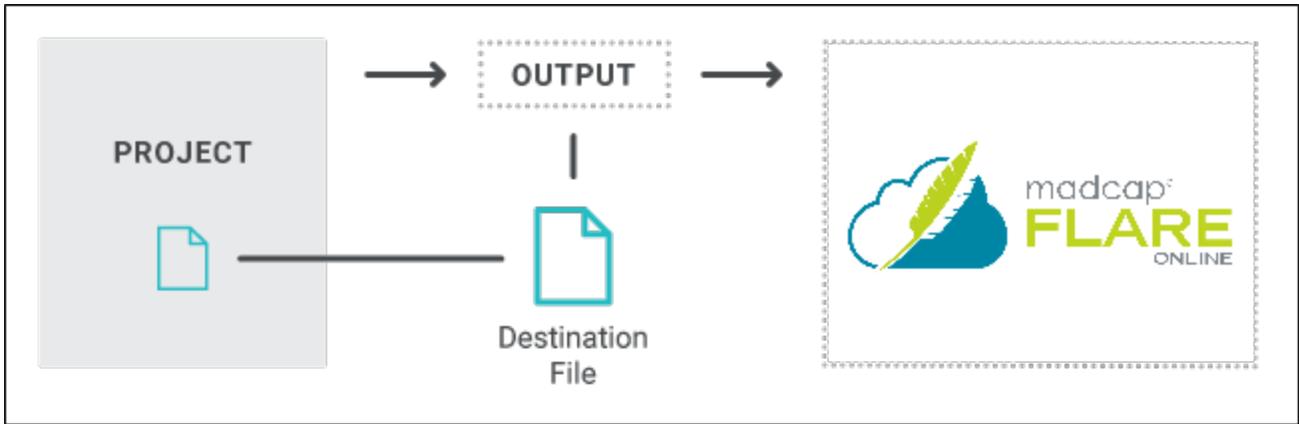
Suppose you accept a topic or snippet containing a new image back into the project, and the Resources > Images subfolder already contains an image with the same file name. In that case, a wizard opens, allowing you to give the new image a different name and/or put it in a different location.

# Publishing Directly to Flare Online

Supported In:



As an alternative to building a target in Flare Online, you can publish output directly from a local project in Flare Desktop to Flare Online. This is possible via a destination file that Flare Desktop automatically creates for you. By “publish,” we mean copying your output files to Flare Online, not making that output “live,” which would make it visible to the general public. You would still need to use Flare Online to make that output accessible to end users.



This chapter discusses the following:

Permission Required? .....	160
How to Publish Directly to Flare Online .....	160
Command Line .....	162
What's Noteworthy? .....	164

# Permission Required?

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



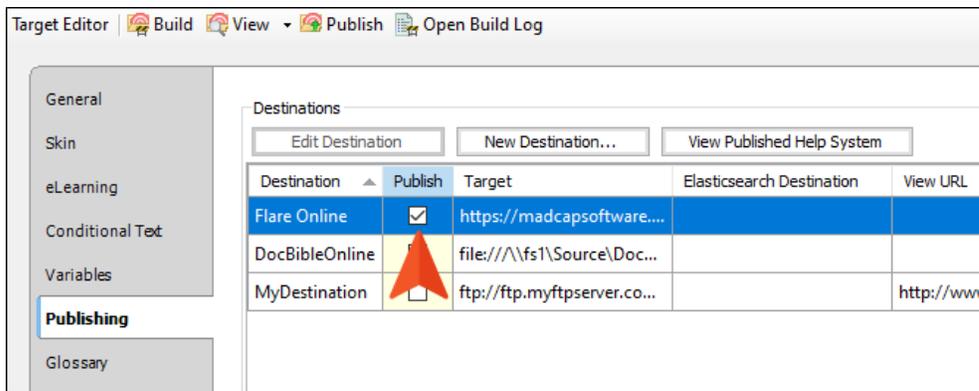
For more information about permissions, see the documentation for Flare Online.

# How to Publish Directly to Flare Online

1. If it is not already done, [upload a local project from Flare Desktop to Flare Online](#).
2. Open a target.

 **NOTE** If you are using Git branching, make sure the appropriate branch is active. When you build and publish the output, it will be for that branch.

3. Select the **Publishing** tab.
4. Next to the **Flare Online** destination, click the **Publish** check box.



 **NOTE** This destination is automatically shown on the tab if the project is bound to Flare Online. If it is not bound to Flare Online, you will not see this destination.

5. Click  to save your work.
6. At the top of the editor, click **Build**.
7. When the build finishes successfully, click **Publish**.

After the target publishes, you can see the result in Flare Online. A Flare Desktop icon displays next to builds that originated from Flare Desktop. A Flare Online icon displays next to builds that originated from Flare Online. Also, if you had a particular Git branch selected when publishing, it will be shown in the Branch column of the grid.

Finished	Duration	State	Progress	By	Source
Apr 15, 2025 9:03 AM	00:00:17	✓ Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>		
Apr 14, 2025 9:56 AM	00:00:23	✓ Complete	<div style="width: 100%; height: 10px; background-color: green;"></div>		

**Originated from Flare Desktop**

**Originated from Flare Online**

# Command Line

You can also use the command line for this feature. Notice that you need to include your email and Flare Online password in the command.

## How to Use the Command Line to Publish Directly to Flare Online

1. Open Notepad (to create and save a batch file) or open your command prompt (to run a command immediately).
2. Type the path to the Flare.app folder where you installed Flare Desktop, and press **ENTER**.

```
cd\Program Files\MadCap Software\MadCap Flare 21\Flare.app
```

 **NOTE** Alternatively, you can use `cd c:\Program Files\[rest of the path]` instead of `cd\Program Files\[rest of the path]`.

3. Type the following and press **ENTER** on your keyboard (entering the correct information in place of the sections in square brackets):

```
madbuild -project [project] -centralUsername [email address] -centralPassword  
[password] -target [target]
```

 **NOTE** If there are spaces anywhere in your path or project name, you need to use quotation marks around it.

☆ **EXAMPLE** Your email address is bsmith@fictionsoft.com, and your Flare Online password is R!ffraff22. You have a project called "FictionSoftPro" that you have stored in a folder of the same name at the root level of the C: drive. If you want to publish the target named "Beginner" to Flare Online, you can type this:

```
madbuild -project c:\fictionsoftpro\fictionsoftpro.flprj -  
centralUsername bsmith@fictionsoft.com -centralPassword R!ffraff22 -  
target Beginner
```

☆ **EXAMPLE** If the project is located in a folder called "My Projects," and the target is named "Beginner Online Help" (with spaces between words), you would type this:

```
madbuild -project "c:\my projects\fictionsoftpro.flprj" -centralUsername  
bsmith@fictionsoft.com -centralPassword R!ffraff22 -target "Beginner  
Online Help"
```

# I What's Noteworthy?

 **NOTE** After the project is bound to Flare Online (along with any targets you plan to publish), it is not technically necessary to synchronize changes with Flare Online to have the latest files included in a build that is initiated locally. However, you would need to continue synchronizing in order to see the latest files in Flare Online when using other features (e.g., checklists, builds initiated from Flare Online).

 **NOTE** MadCap Search and Elasticsearch are supported with this feature. Google Search is not supported.

 **NOTE** Build events are supported when publishing directly to Flare Online. However, when building from Flare Online itself, build events are not supported.

# Removing Bindings

If you no longer need your project to be bound to Flare Online, you can remove its binding. Removing the binding from a project does not remove that project from Flare Online; instead, it simply removes the link between Flare Online and your local project. The project will still be available locally, but you will no longer be able to upload (push) changes from your local project to the cloned project in Flare Online.

 **NOTE** If you are working in a dual-bound setup and want to remove the first binding and leave the Flare Online binding, see "Moving From Dual-Bound to Single-Bound" on page 33.

This chapter discusses the following:

Permission Required? .....	166
How to Remove a Binding from a Project in Flare Online .....	166

# I Permission Required?

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

**Create/Upload New Projects**

For more information about permissions, see the documentation for Flare Online.

# I How to Remove a Binding from a Project in Flare Online

1. Open the project in MadCap Flare Desktop.
2. Select **View > Flare Online**. The Flare Online window pane opens.
3. Be sure to log in if you aren't already.
4. Click .
5. In the confirmation window, click **OK**.
6. (Optional) In MadCap Flare Online, you can click **Projects** on the left side to open the Projects page. The unbound project is still shown in the grid. However, you can archive it or delete it if you no longer need it. If you do not archive it or delete it, it will remain in the project list, but you will not be able to push changes to it. For more information about archiving and deleting projects, see the documentation for Flare Online.

 **NOTE** Binding and unbinding is usually straightforward when using the Flare Desktop interface. However, if you bind to projects outside of Flare Desktop, there is more you should know.

## APPENDIX

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# PDFs

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

## I Tutorials

*Autonumbers Tutorial*

*Back-to-Top Button Tutorial*

*Context-Sensitive Help Tutorial*

*Custom Toolbar Tutorial*

*eLearning Tutorial—Basic*

*eLearning Tutorial—Advanced*

*Getting Started Tutorial*

*Image Tooltips Tutorial*

*Lists Tutorial*

*Meta Tags Tutorial*

*Micro Content Tutorial—Basic*

*Micro Content Tutorial—Advanced*

*Responsive Output Tutorial*

*Single-Sourcing Tutorial*

*Snippet Conditions Tutorial*

*Styles Tutorials*

*Tables Tutorial*

*Word Import Tutorial*

# | Cheat Sheets

*Context-Sensitive Help Cheat Sheet*

*Folders and Files Cheat Sheet*

*Learning & Development Cheat Sheet*

*Lists Cheat Sheet*

*Micro Content Cheat Sheet*

*Print-Based Output Cheat Sheet*

*Search Cheat Sheet*

*Shortcuts Cheat Sheet*

*Structure Bars Cheat Sheet*

*Styles Cheat Sheet*

# I User Guides

*Accessibility Guide*

*Analysis and Reports Guide*

*Architecture Guide*

*Autonumbers Guide*

*Branding Guide*

*Condition Tags Guide*

*Context-Sensitive Help Guide*

*Eclipse Help Guide*

*eLearning Guide*

*Flare Online Integration  
Guide*

*Getting Started Guide*

*Global Project Linking Guide*

*HTML5 Guide*

*Images Guide*

*Import Guide*

*Indexing Guide*

*Key Features Guide*

*Lists Guide*

*Meta Tags Guide*

*Micro Content Guide*

*Navigation Links Guide*

*Plug-In API Guide*

*Print-Based Output Guide*

*Project Creation Guide*

*QR Codes Guide*

*Reviews & Contributions With  
Contributor Guide*

*Scripting Guide*

*Search Guide*

*SharePoint Guide*

*Skins Guide*

*Snippets Guide*

*Source Control Guide: Git*

*Source Control Guide:  
Perforce Helix Core*

*Source Control Guide:  
Subversion*

*Source Control Guide: Team  
Foundation Server*

*Styles Guide*

*Tables Guide*

*Tables of Contents Guide*

*Targets Guide*

*Template Pages Guide*

*Templates Guide*

*Topics Guide*

*Touring the Workspace Guide*

*Transition From FrameMaker  
Guide*

*Translation and Localization  
Guide*

*Variables Guide*

*Videos Guide*

*What's New Guide*