



MADCAP FLARE 2018

What's New

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THIS PDF WAS CREATED USING MADCAP FLARE.

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CHAPTER 1

Introduction

Following are the new features in this release of Flare.

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

Feature	What's New?
"Review Workflow with MadCap Central" on page 7	<ul style="list-style-type: none">■ Streamlined review workflow between this version of Flare and MadCap Central■ Add non-Flare users—i.e., subject matter experts (SMEs)—to your Central license■ Collaborate with SMEs (and other authors)■ Cloud review■ Multi-user editing■ Review-only interface■ Auto-save and tracking changes
"Side Navigation Output" on page 25	<ul style="list-style-type: none">■ Frameless, modern look■ Topic links on side of interface■ Side Navigation template and tutorial available

Feature	What's New?
"Elasticsearch" on page 45	<ul style="list-style-type: none"> ■ Powerful search engine for HTML5 output ■ Fuzzy matching (i.e., matching similar words) ■ Predictive search ■ Auto-completion ■ Enabled by use of MadCap Process Manager, which manages Elasticsearch service and Flare web service
"Expanded Project Analysis" on page 75	<ul style="list-style-type: none"> ■ Most features from MadCap Analyzer now integrated into Flare ■ Many more types of scans of your project now available ■ New Analysis ribbon ■ Analysis Summary window pane
"Additional Features" on page 86	<ul style="list-style-type: none"> ■ Auto-sync TOC ■ Find and replace—drag topics to TOC/browse sequence ■ Find Elements window pane ■ Global track changes ■ Locate topics in TOC/Content Explorer ■ Microsoft TFS 2018 support ■ Salesforce enhancements ■ SharePoint 2016 and 365 support ■ User interface improvements

CHAPTER 2

Review Workflow with MadCap Central

A streamlined review workflow is available between this version of Flare and MadCap Central. This process allows you to add non-Flare users—i.e., subject matter experts (SMEs)—to your Central license. Then you can collaborate with SMEs (and other authors) by viewing and working with the same Flare content files (i.e., topics and snippets) in a lightweight editor.

This chapter discusses the following:

- Benefits 8
- Workflow 9

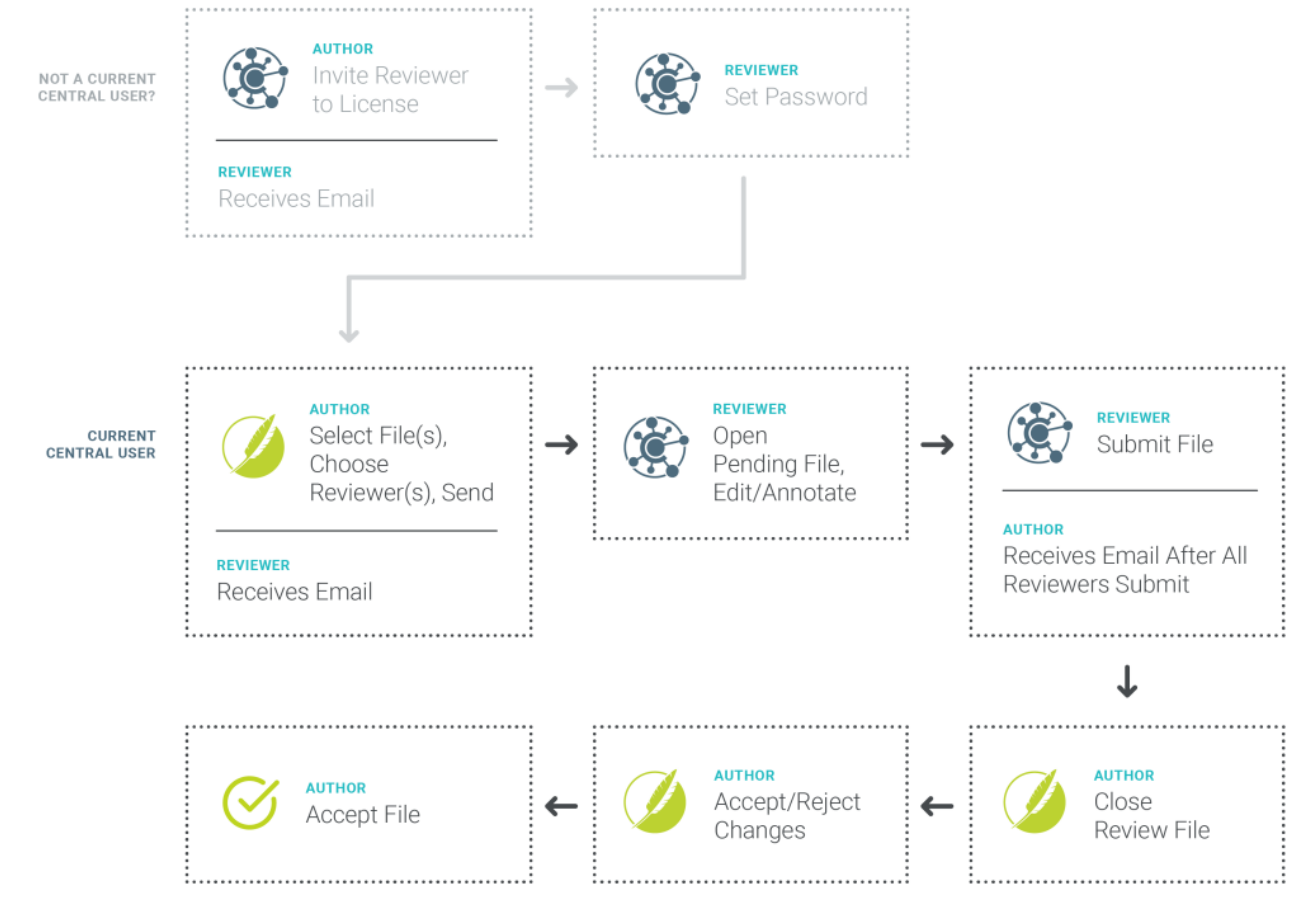
Benefits

Benefits of this review workflow include:

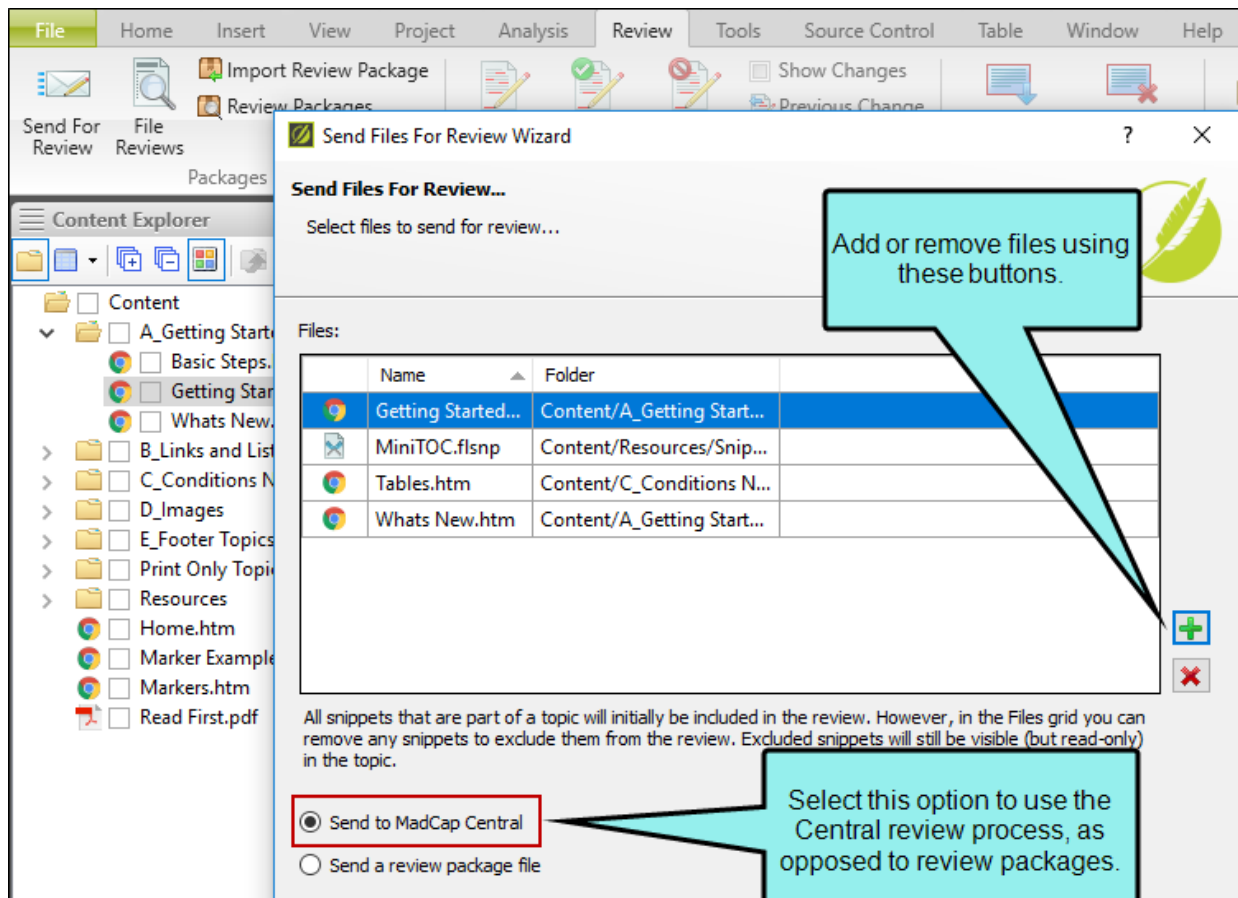
- **Cloud Review** SMEs do not need to download and install any software. The review takes place in the cloud.
- **Multi-User Editing** Multiple SMEs and authors can make changes and add comments to the same topic or snippet at the same time.
- **Review-Only Interface** A lightweight version of the editor means a streamlined interface. You will 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 that the original author can easily locate edits for approval or rejection.

Workflow

Following is how the Flare-Central review process works between the original Flare author and reviewers. In this workflow, reviewers can be SMEs or other Flare authors.



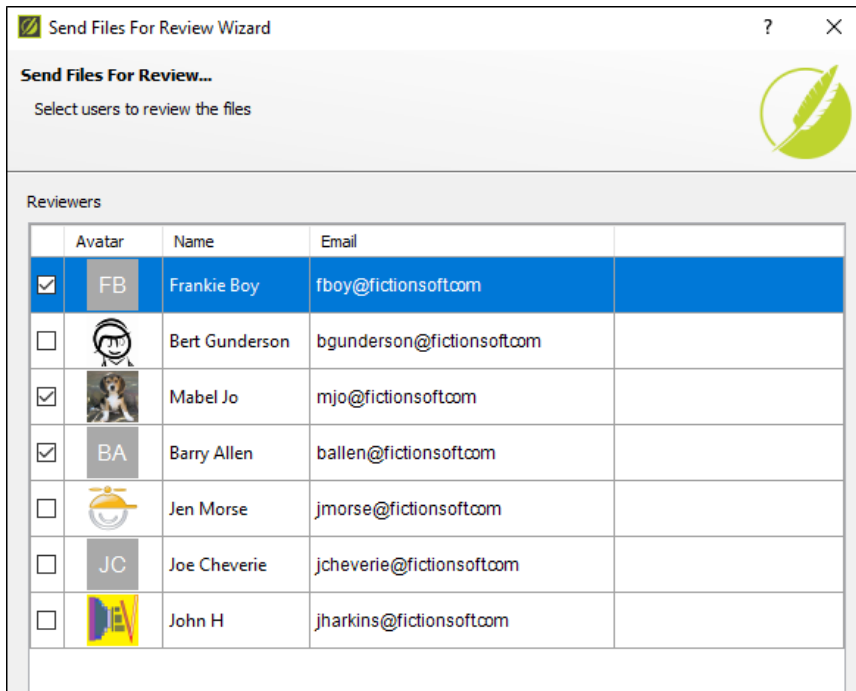
1. **Original Author—Invite Reviewer to Central License** Before you can take advantage of the review process between Flare and Central, you need to invite SMEs or Flare authors to the license (if they are not already Central users). See the Central online Help.
2. **Reviewer—Set Password** When you invite someone to join your Central license, he or she receives an email. From there, the individual can click a link to set a password in Central.
3. **Original Author—Select File(s), Choose Reviewer(s), and Send** In Flare, the original author uses the MadCap Central window pane to log into Central. Then he or she opens the Send Files for Review Wizard and populates it with topics and/or snippets that need to be reviewed by others. Also, the option **Send to MadCap Central** must be selected.



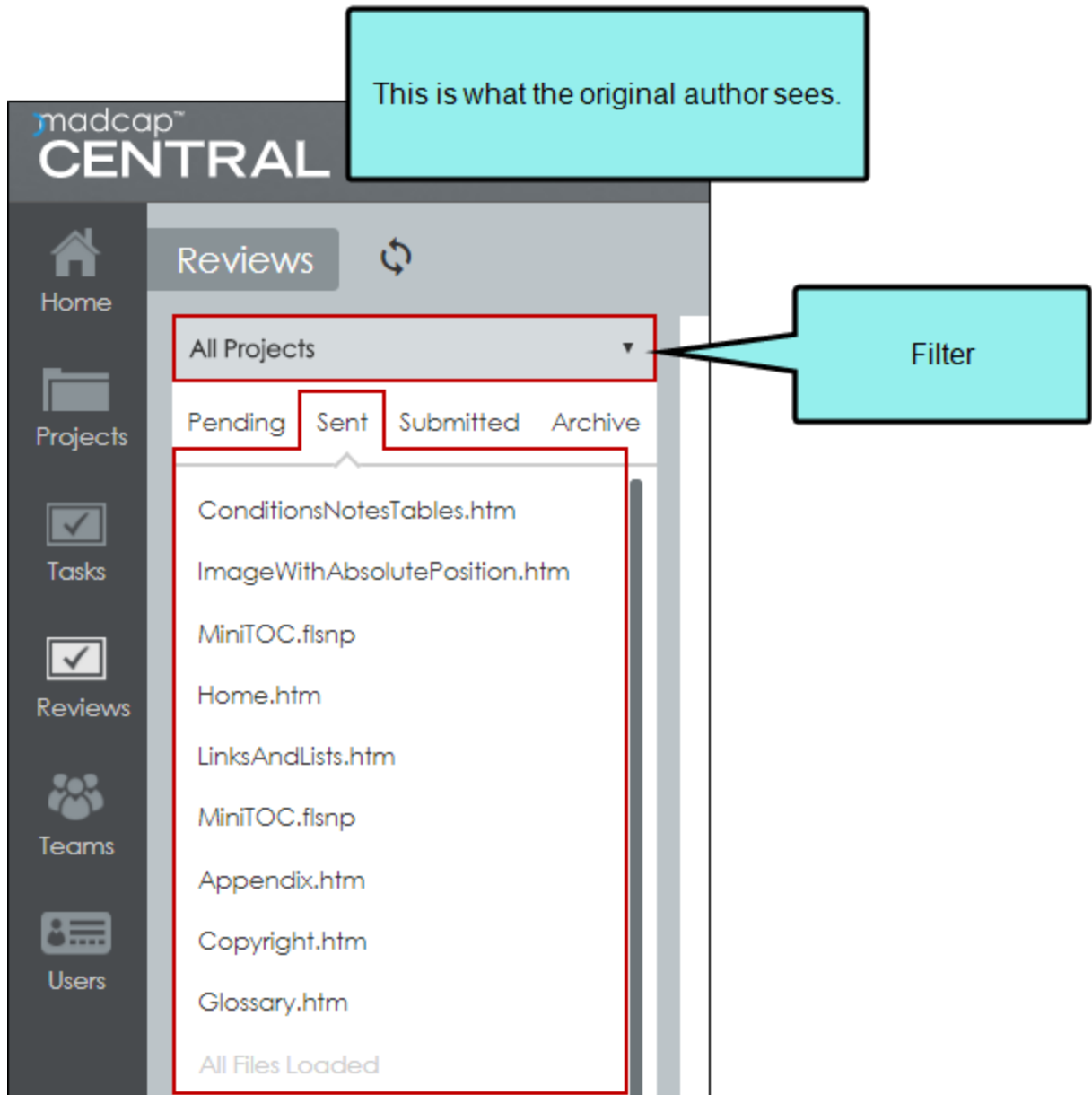
✔ **TIP:** All snippets that are part of a topic will initially be included in the review. However, in the Files grid you can remove any snippets to exclude them from the review. You might choose to exclude some (or all) snippets from the review if you think it will be too confusing and too many files for your reviewers. If you exclude snippets, they will still be visible in the topic in Central, 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.

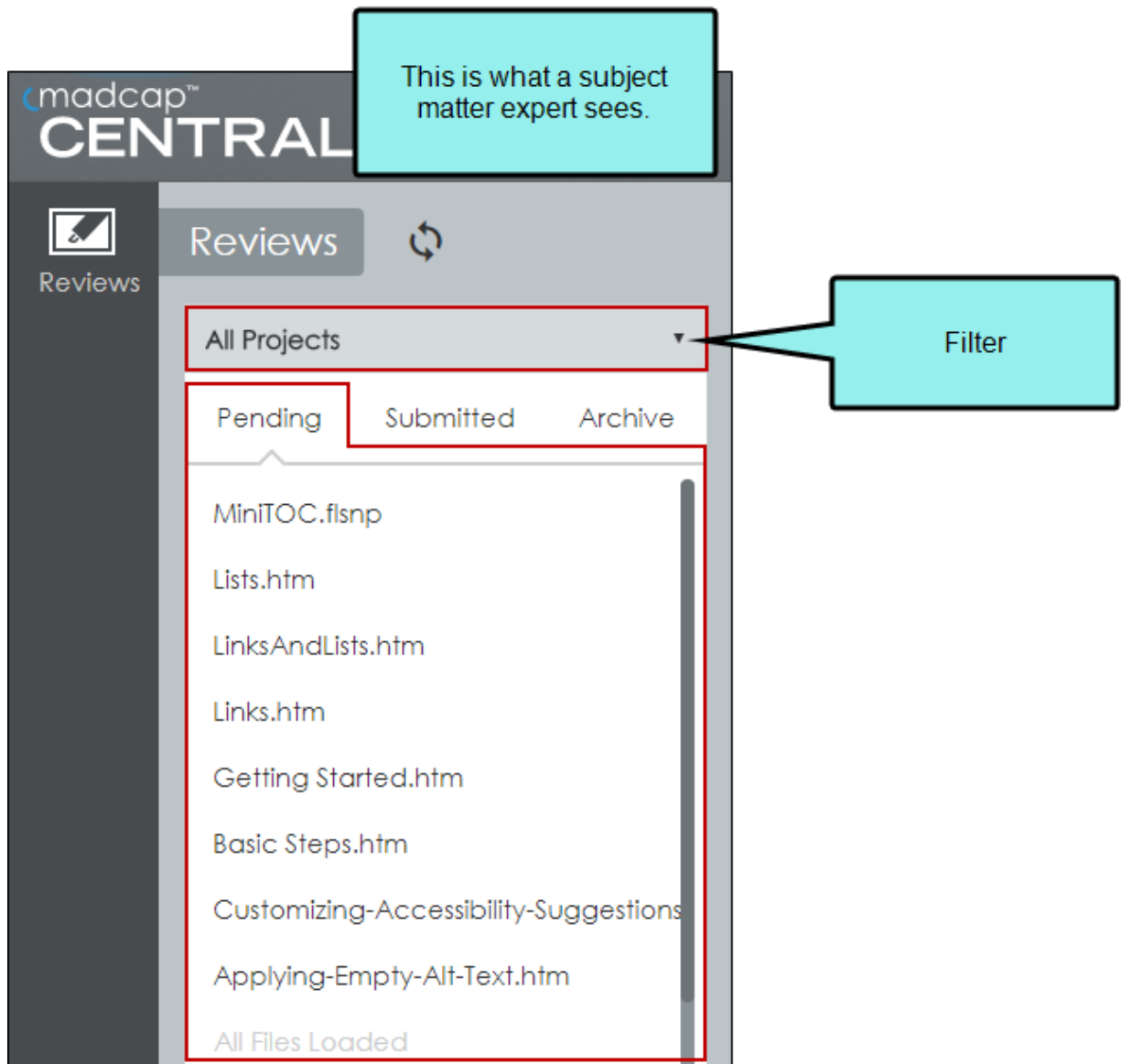
📄 **NOTE:** If necessary, Flare will also prompt you to commit and synchronize any changes in your project with Central before you can proceed to the next page of the wizard.

On the next page of the wizard, the author chooses reviewers in the Central license. This might include SMEs, as well as other Flare authors. Anyone selected during this process will automatically become associated with that Flare project on Central. Also, anyone selected will become an assigned reviewer for all files chosen in the wizard.



After completing the wizard, the files are uploaded and reviewers receive an email notification with a link to open the Reviews page in Central. (SMEs automatically receive email notifications; however, Flare authors must have the review notifications and email option enabled in Central to receive emails.) If you are the original author, the files will be listed in your Sent pane. If you are a reviewer, the files will be listed in your Pending pane. Also, you can use a filter above the panes to view files for all projects, or just for a specific project.





In addition, the files appear in the “Sent Files” area of File Reviews window pane in Flare. This means the files are in an “Open” state, pending review. Because this window pane can be used for reviews in both MadCap Central and Contributor, an icon is used to indicate which system is being used for a particular file.

	Info	File	Package	Sent
		MiniTOC	My Big Project	3/14/2018 3:15:...
		Tables	My Big Project	3/14/2018 3:15:...
		Basic Steps	MadCap Central	4/14/2018 12:1:...
		Getting Started	MadCap Central	4/14/2018 12:2:...
		Links	MadCap Central	4/14/2018 12:5:...
		LinksAndLists	MadCap Central	4/14/2018 12:5:...
		Links-Footnote...	MadCap Central	4/14/2018 12:5:...
		Links-Footnote...	MadCap Central	4/14/2018 12:5:...
		Changed Lists	MadCap Central	4/14/2018 12:5:...
		Lists	MadCap Central	4/14/2018 12:5:...
		MiniTOC	MadCap Central	4/14/2018 12:5:...
		Whats New	MadCap Central	4/14/2018 12:2:...

NOTE: If you attempt to edit a file that has been sent out for review and is still in an “Open” state, you will see a warning. You can continue to 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, you can edit it in Central along with your reviewers until it is finished.

- Reviewer—Open Pending File and Edit/Annotate** Anyone involved in the review process for the selected files (i.e., authors and SMEs) can open the Reviews page in Central to work with those files.

After opening a topic or snippet, you can edit it or insert annotations as necessary. All changes are tracked and auto-saved as you work. In addition, other SMEs and authors can edit a file at the same time, so you will see their changes as well in real time. For details of the editor interface, see the Central online Help.

The user interface will look one way for reviewers and another way for authors.

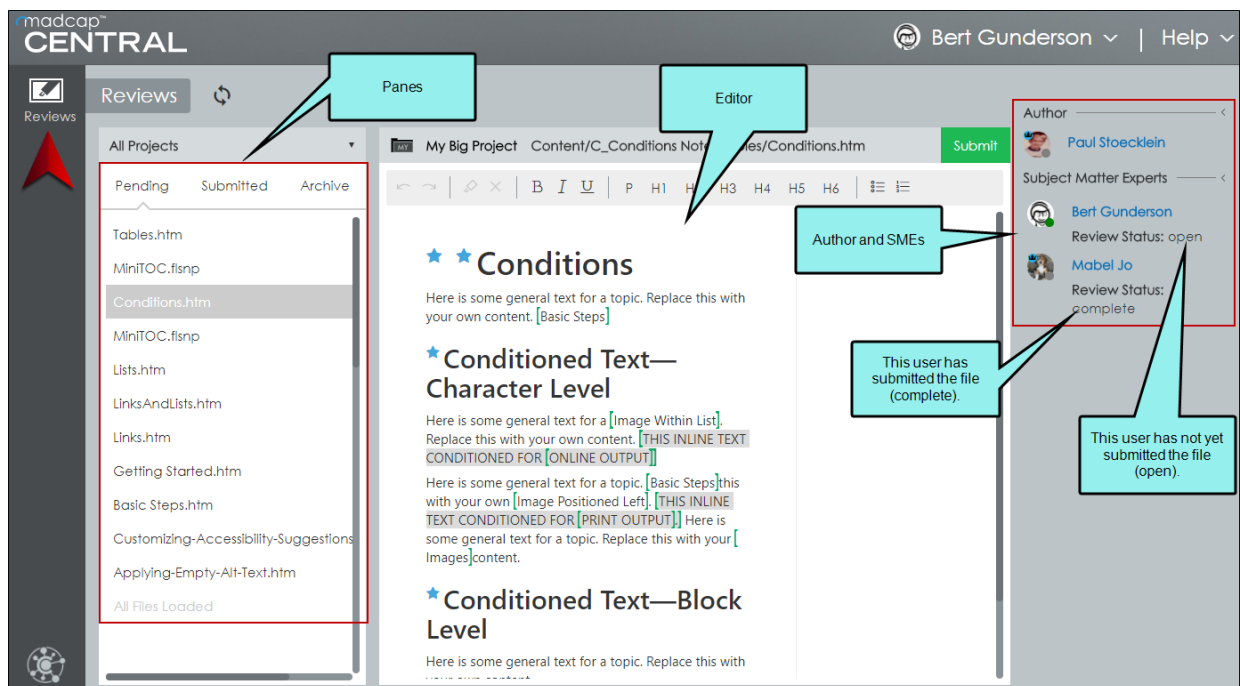
What Subject Matter Experts Will See and Do

Since the review process is the only feature that is important for SMEs in Central, those users will not see any of the other pages in the interface. They will only see the Reviews page.

The area on the left shows Flare project files (topics and snippets), contained in three panes—Pending, Submitted, and Archive.

- **Pending** This pane displays files that the user needs to review.
- **Submitted** This pane displays files that the user has completed and submitted.
- **Archive** This pane displays files that have been closed (by the author). These files are read-only.

To the right is the editor that shows the content for a selected file. And on the far right is the name of the original author above a list of all users who have been assigned to review the selected file. The heading says “Subject Matter Experts,” but the individuals listed can be either SMEs or other authors who are also assigned as reviewers for the selected file. An indicator shows whether each person has submitted the file after completing it.



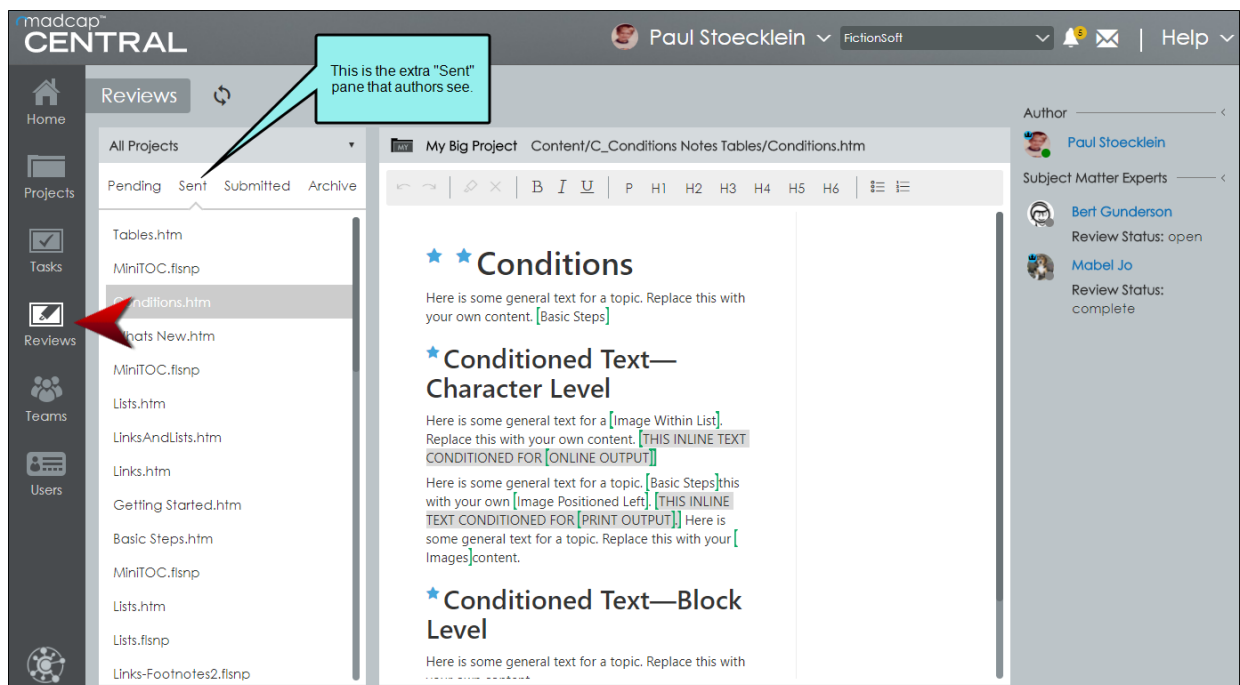
What Authors Will See and Do


In addition to the other page icons, authors will see the Reviews icon on the left. Selecting this icon opens the Reviews page, which shows files sent for review and the lightweight editor where the edits and annotations take place.


The area on the left is nearly identical to what SMEs see, except there is an extra pane (Sent) because an author can be both the sender of reviewed files and a recipient from another author. There are four panes—Pending, Sent, Submitted, and Archive.

- **Pending** This pane displays files that the author needs to review (if you are not the original author, but rather acting as one of the reviewers).
- **Sent** This pane displays files that you have sent to others for review.
- **Submitted** This pane displays files that the author has completed and submitted (acting as one of the reviewers).
- **Archive** This pane displays files that have been closed (by the original author). These files are read-only.

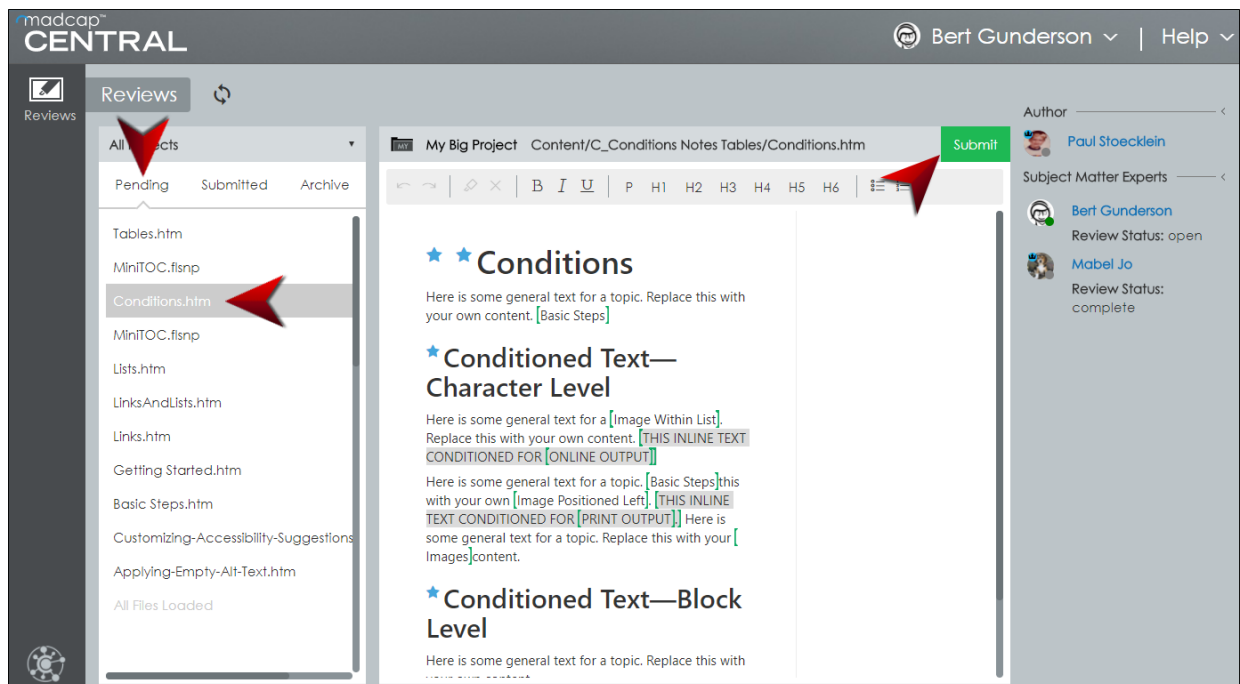
If you are an author who has sent files for review, you can make edits along with the reviewers, and your modifications will be tracked just like those for the others. However, you will not see the “Submit” button on documents in your Sent list; that button is used only by reviewers.



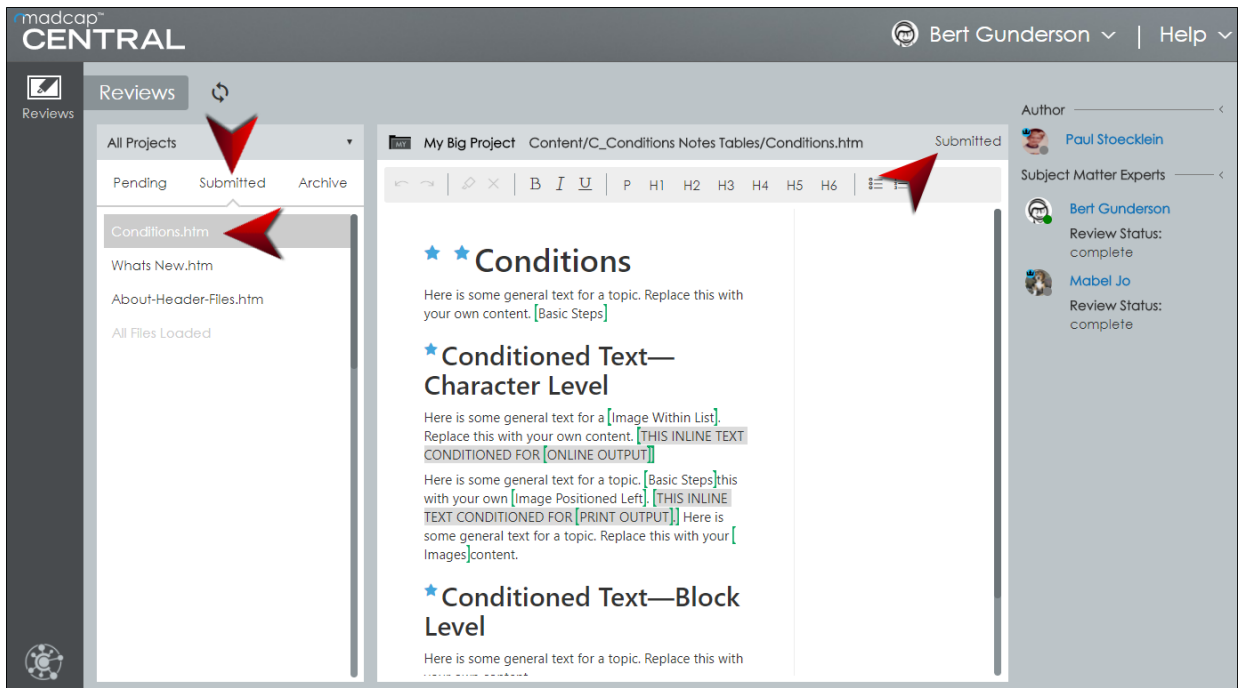
 **NOTE:** Tables are read-only content in the lightweight editor in Central.

 **NOTE:** Aside from a few basic tags available in the toolbar (B, I, U, P, H1-H6, and lists), you cannot apply styles to a file that is being reviewed. You can only edit the content. Also, the files will not look exactly like your source files because the formatting from your stylesheet is not rendered in this editor.

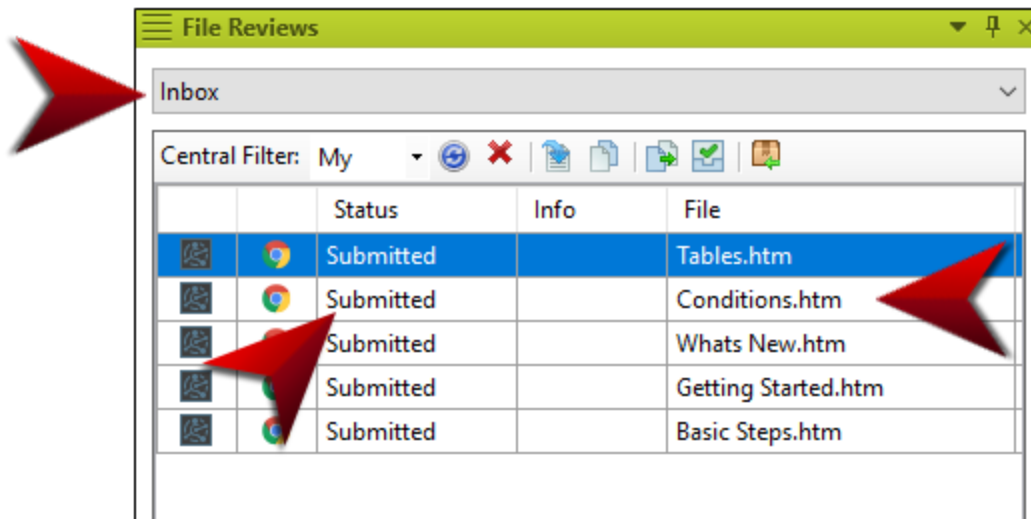
5. **Reviewer—Submit File** A reviewer can return to a file in the Pending pane repeatedly over time to make changes to it. When the reviewer is finished working on a file and does not need to make any further edits, he or she clicks the **Submit** button on the Reviews page.



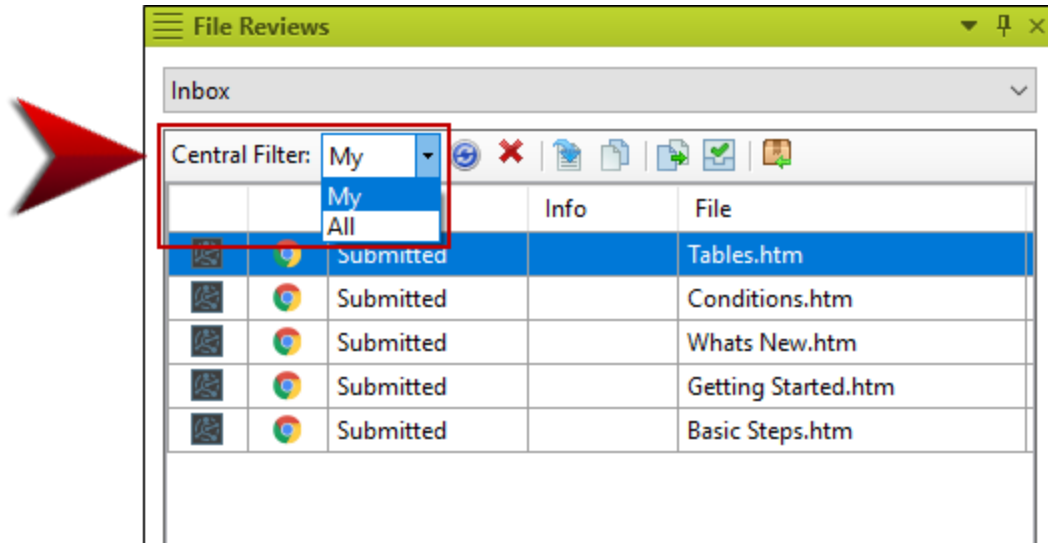
This moves the file to your Submitted pane. If necessary, you can view the file from there and edit it more. However, once the author closes the review process for the file, it can no longer be edited in Central.




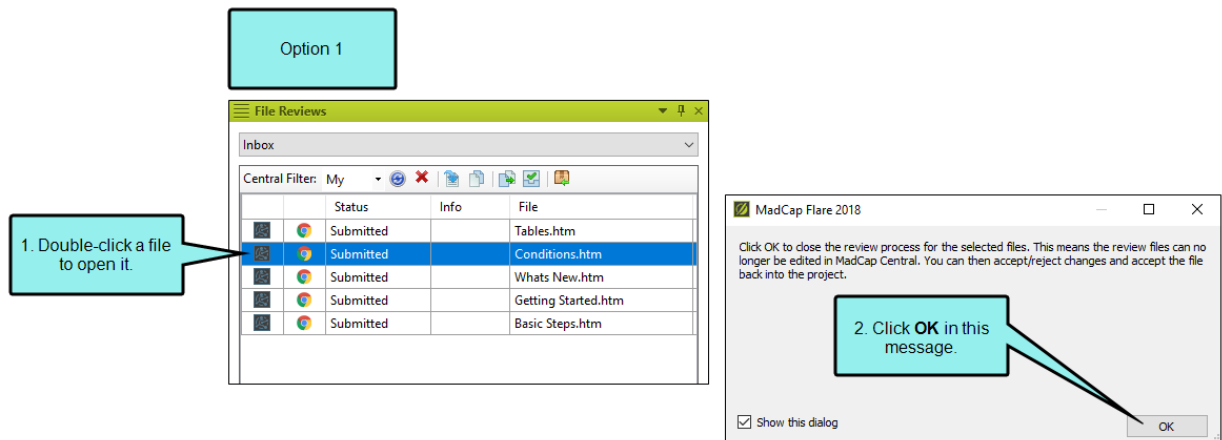
After all of the reviewers submit the file, the original author receives an email notification (if the author has enabled those notifications in Central) and the file appears in the “Inbox” view of the File Reviews window pane in Flare.



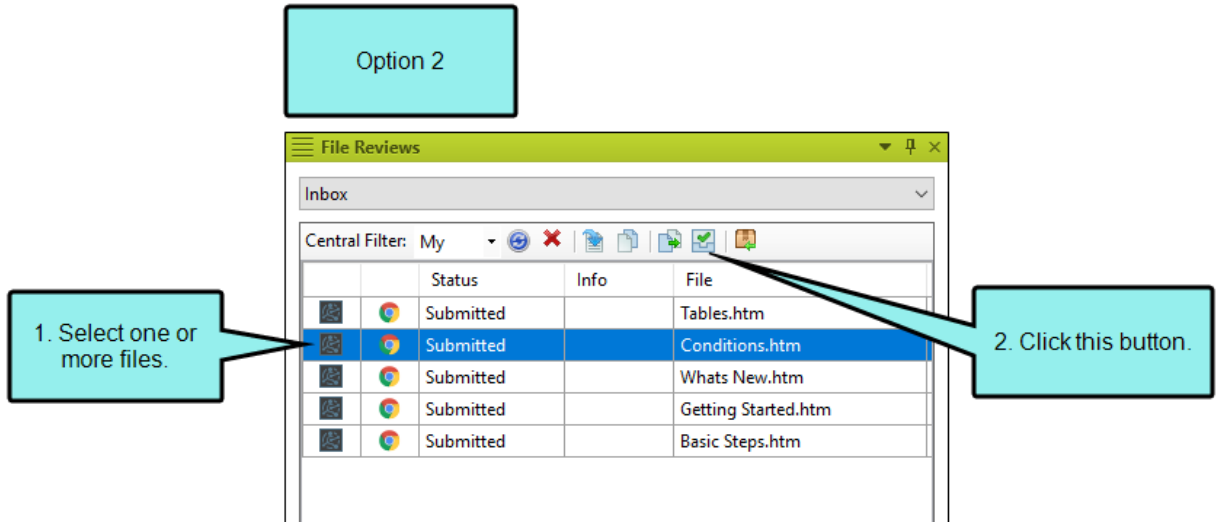
In addition, a filter with “My” or “All” can be used to show files associated with different Flare authors. If you select “All,” you will see files sent for review by all Flare authors. If you select “My,” you will see only the files that you have sent for review.



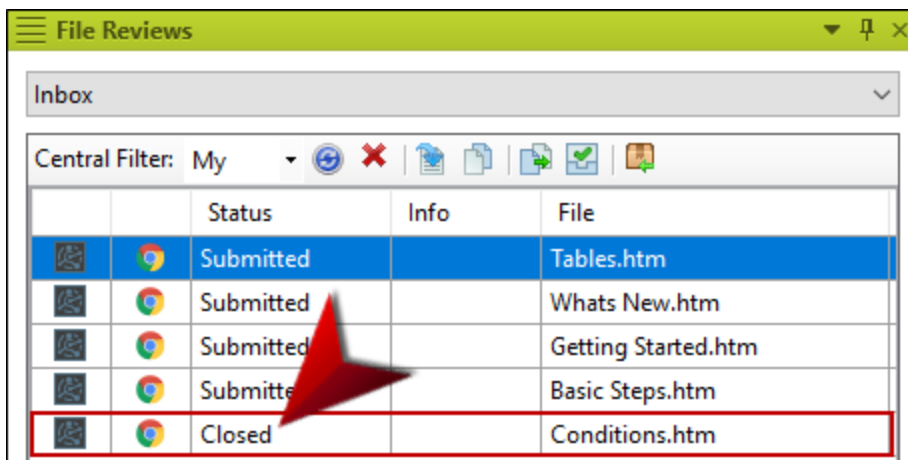
- Author—Close Review File** After all reviewers submit a file in Central, the author can close out the review process for that file in Flare’s File Reviews window pane. This can be done by attempting to open the file, in which case you are prompted to close out the review process. Alternatively, you can select the file (as well as several others) in the File Reviews grid and click .

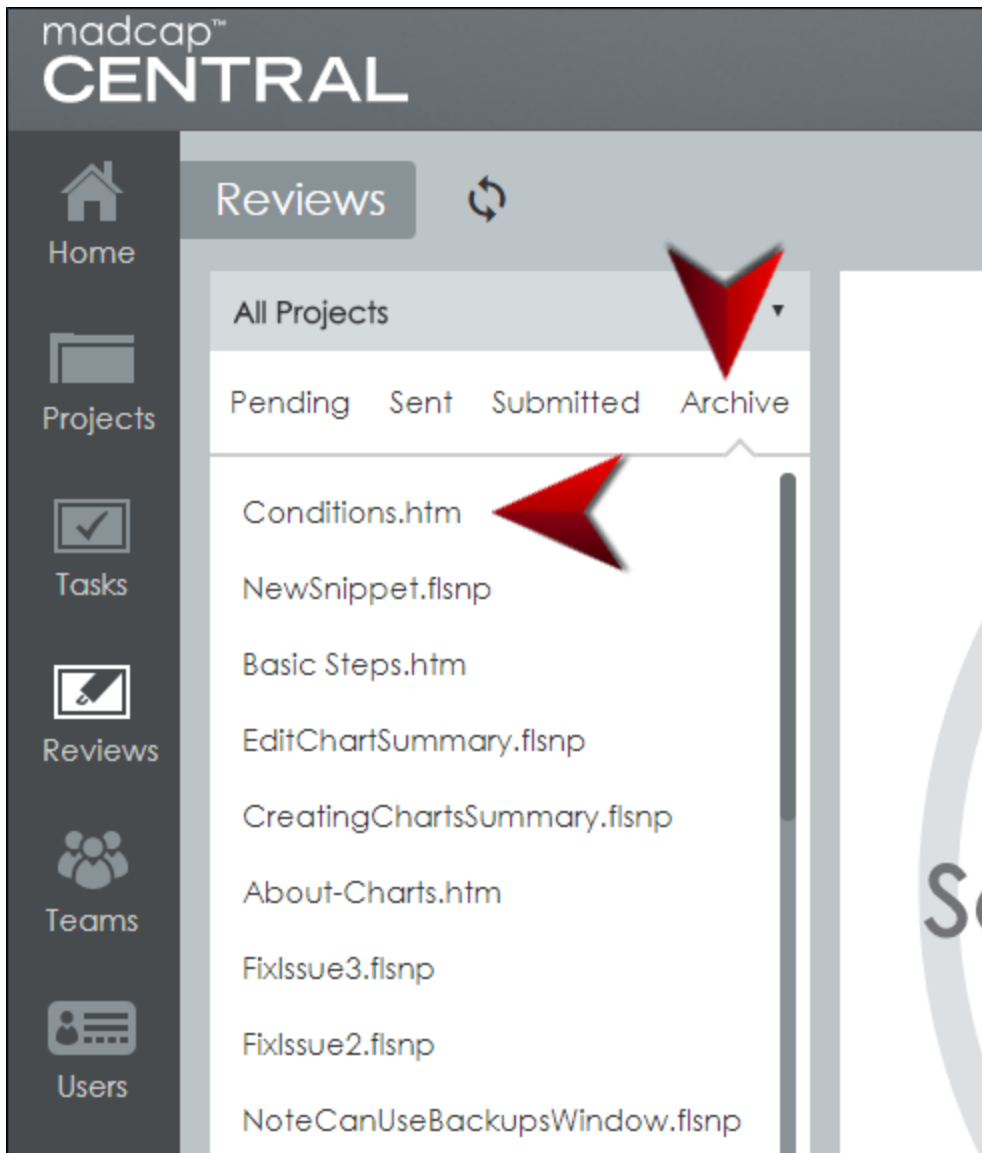



Option 2



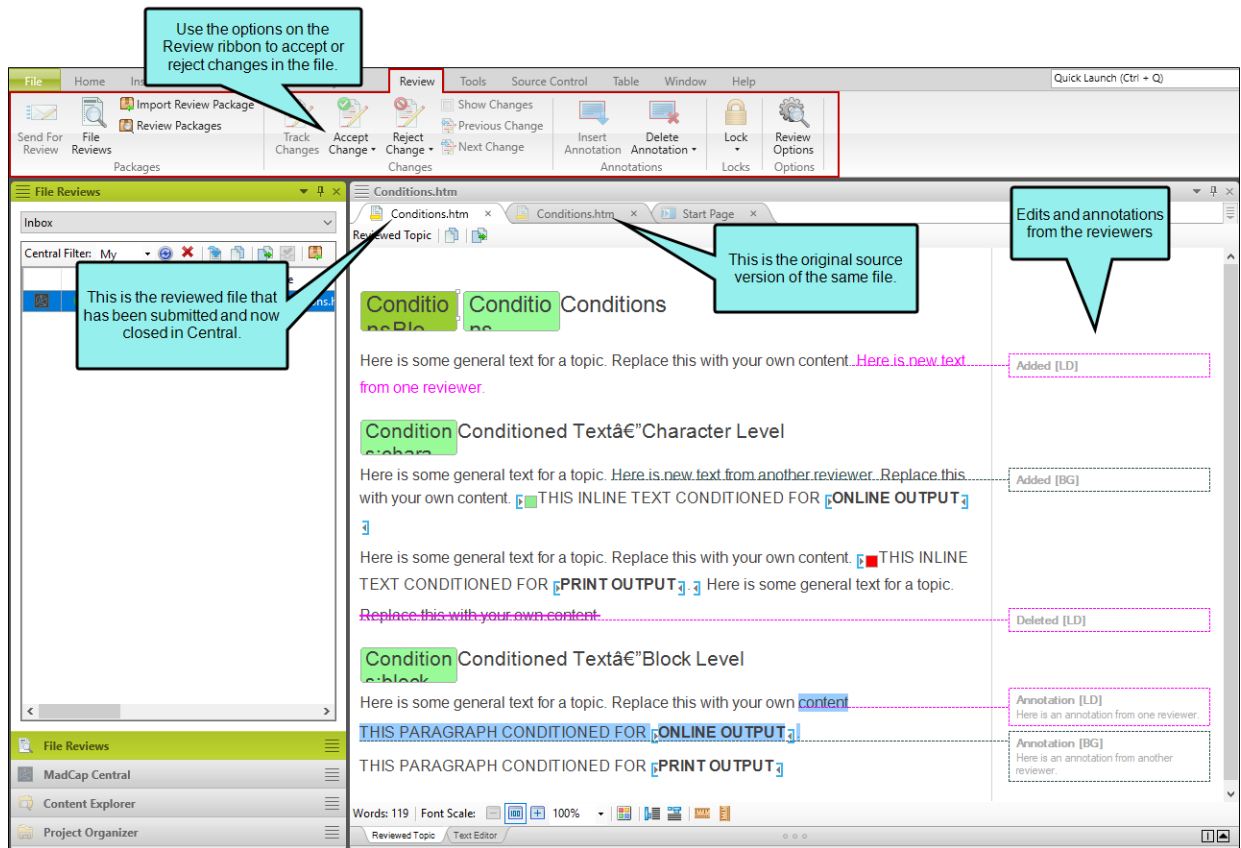
After this, the status for the file is changed to “Closed” in the File Reviews window pane. Also, the file can no longer be edited by anyone in Central, and the file is moved to the Archive pane.




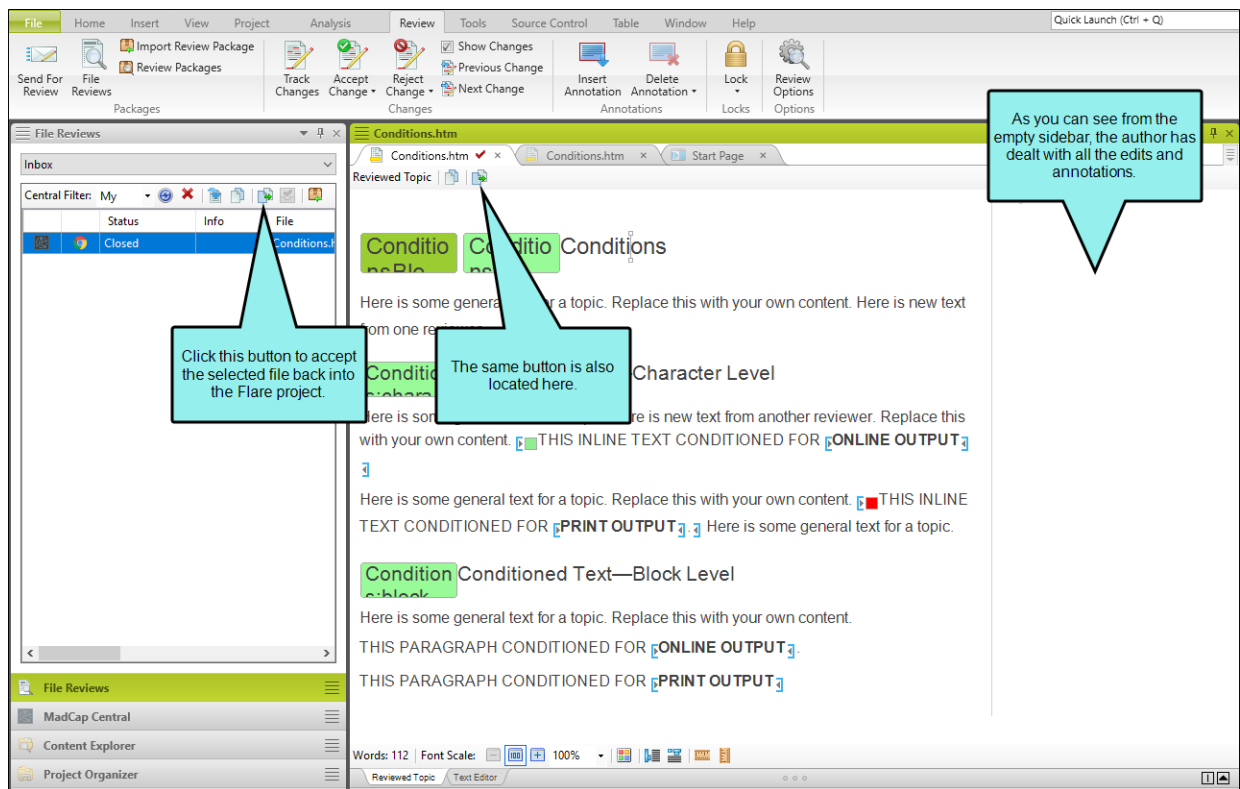


 **NOTE:** Any authors working in that Flare project can close the review file. This is necessary in case the original author is not available to close it.

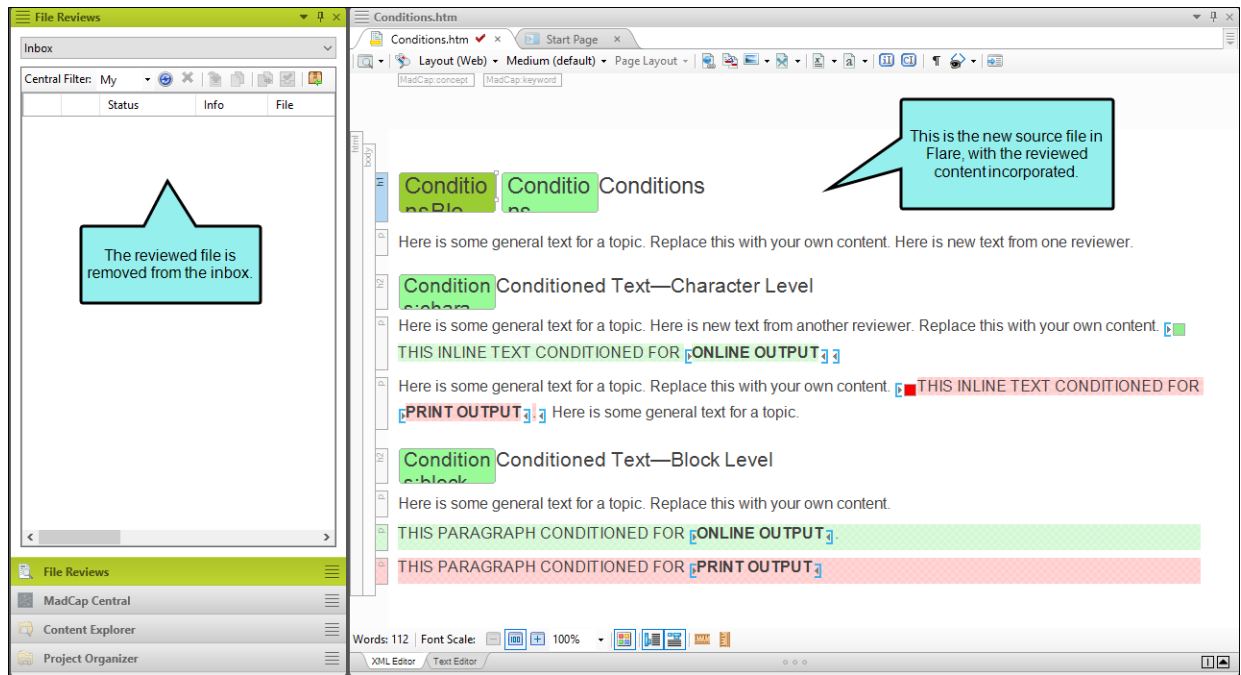
7. **Author—Accept/Reject Changes** After closing the review process on Central for a file, the author can open the reviewed file in Flare. Changes can be accepted or rejected as necessary.



8. **Author—Accept File** When the author is finished accepting or rejecting the changes, he or she accepts the file back into the Flare project, replacing the old file. This can be done by clicking  in the File Reviews window pane or in the local toolbar.



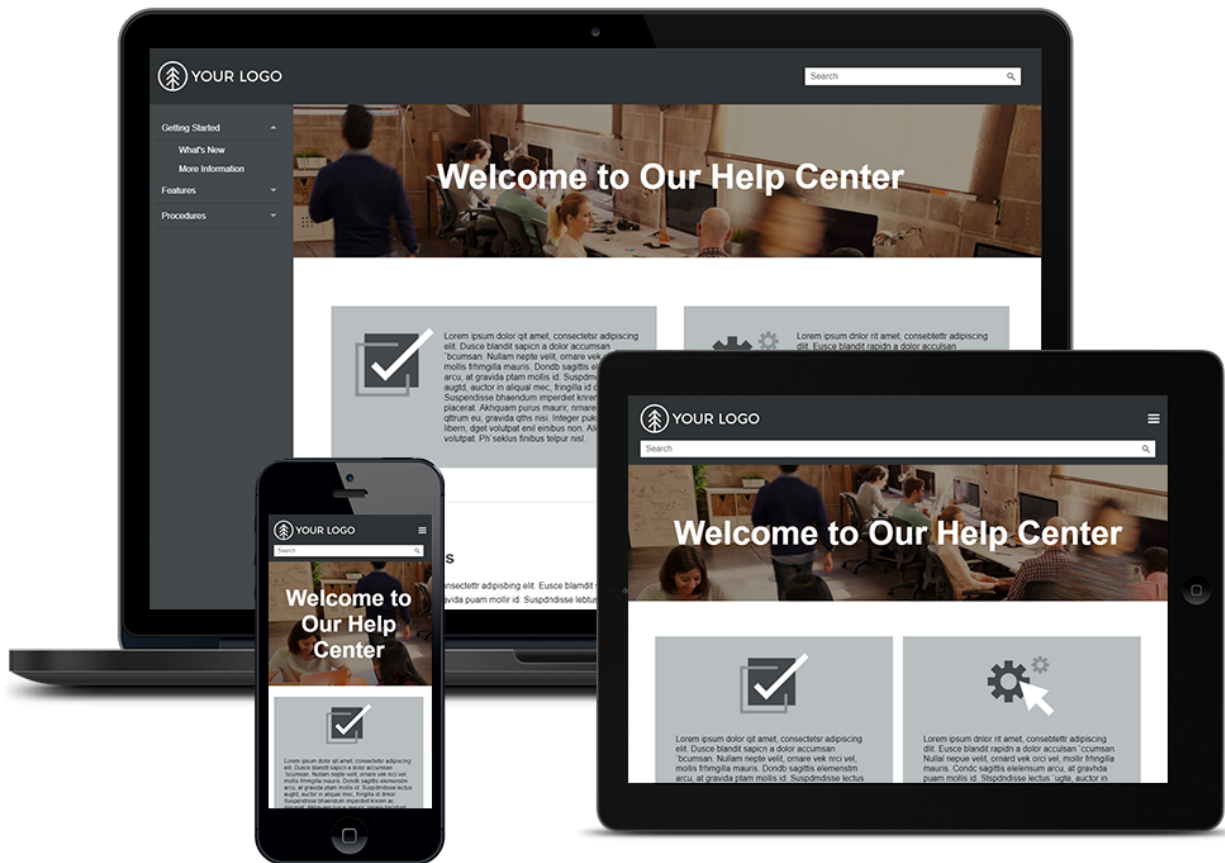
The file is then removed from the Flare inbox.



CHAPTER 3

Side Navigation Output

If you would like to be able to produce the same frameless, modern look of Top Navigation output, but you want the topic links to be on the side of the interface (similar to the old Tripane output), you can now create Side Navigation output for HTML5 targets.

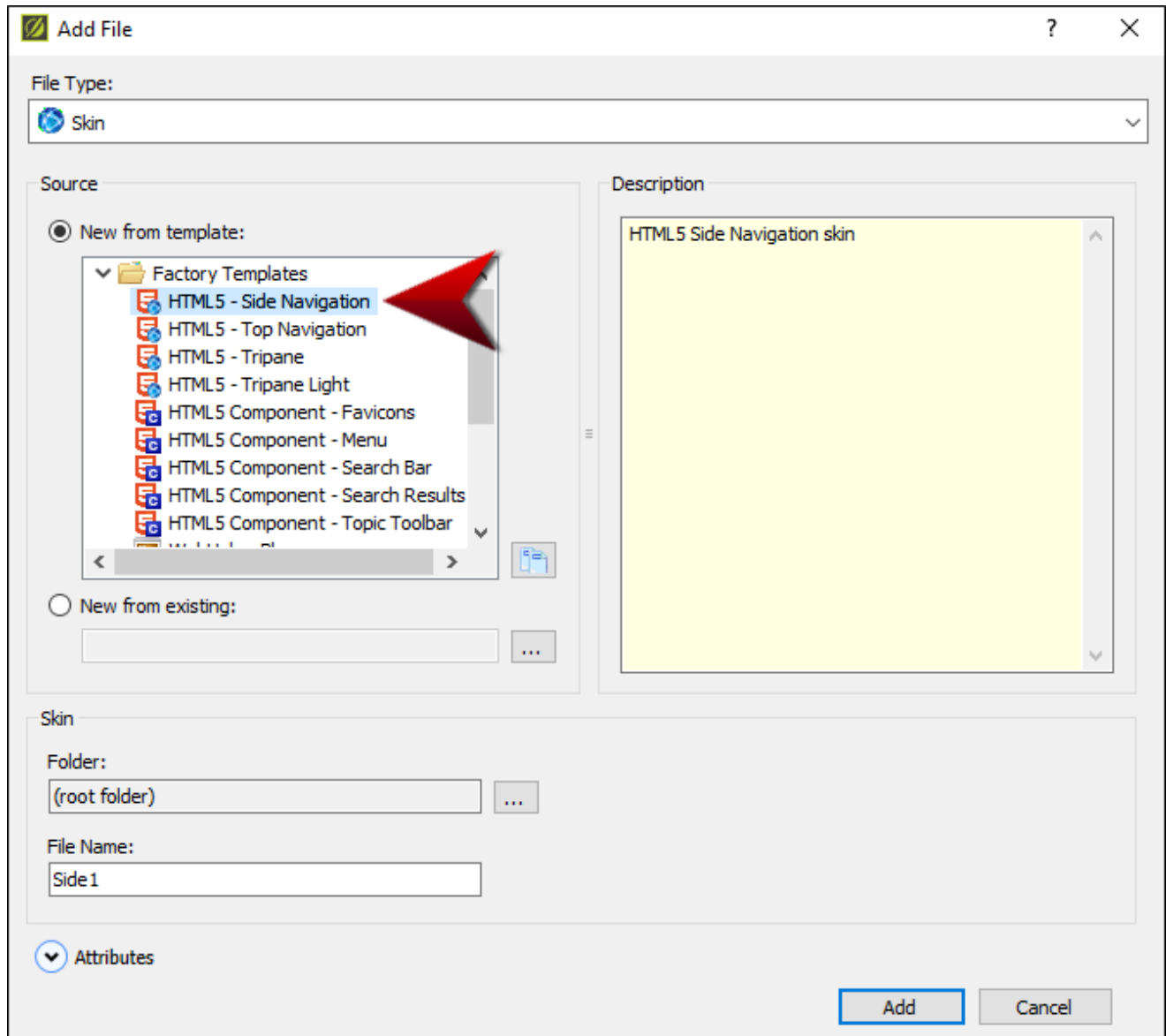


This chapter discusses the following:

Side Navigation Skin	27
Side Navigation Template	43
Side Navigation Tutorial	44

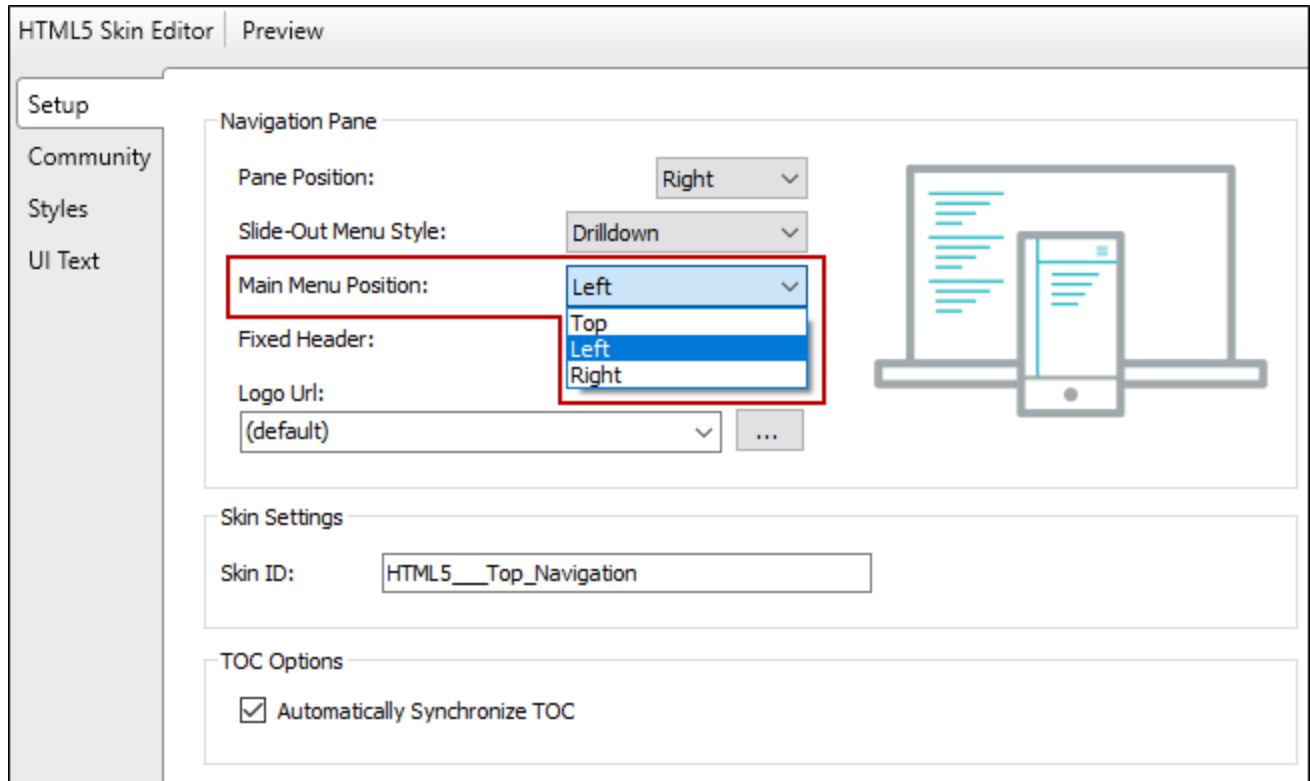
Side Navigation Skin

Side and Top Navigation have a lot in common. The main difference is where the main navigation links are placed in the skin. Therefore, a new Side Navigation skin type is now available in Flare.

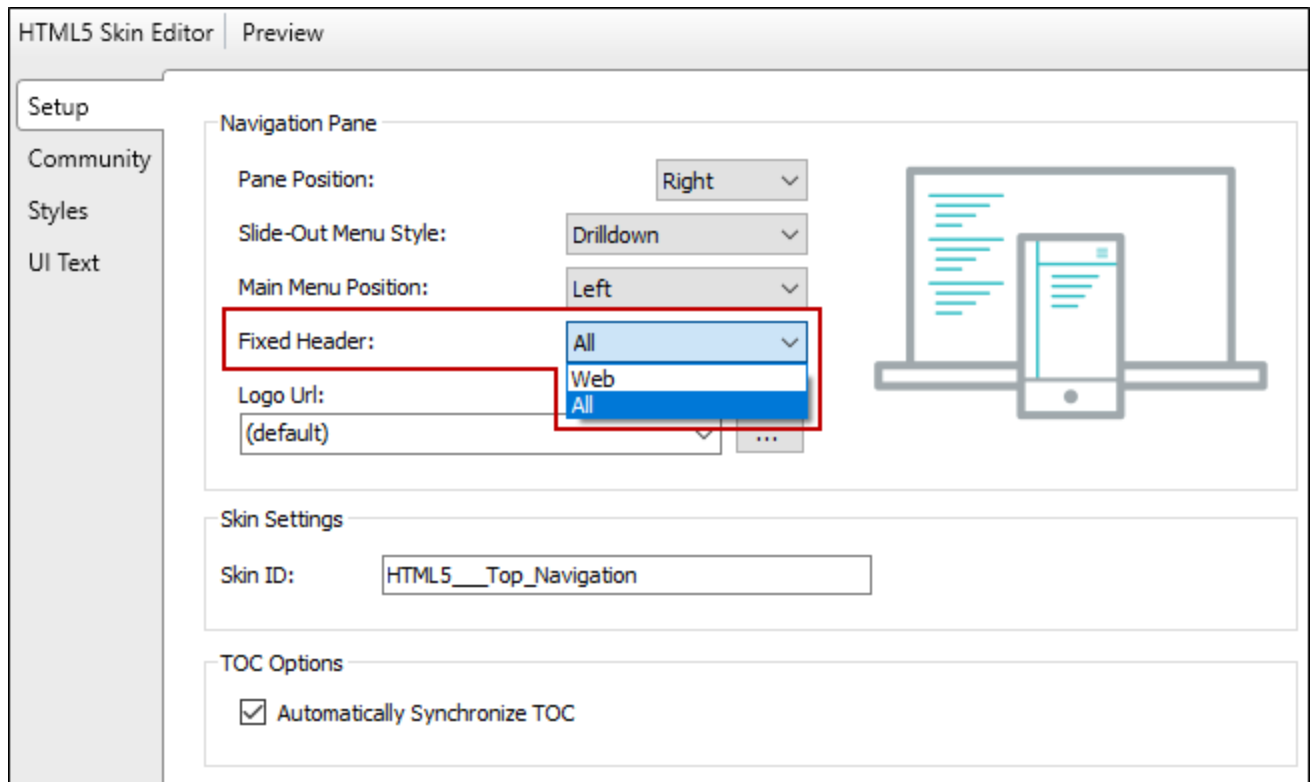


Main Menu Position

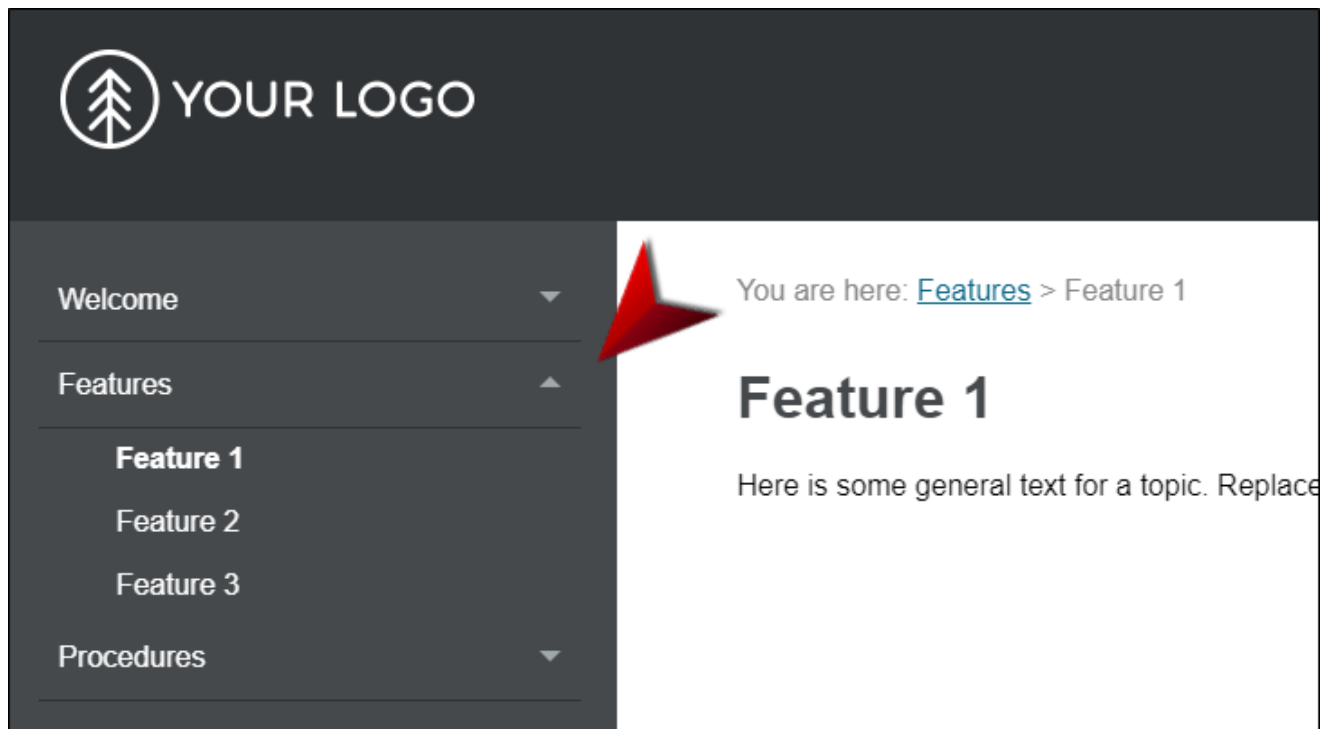
Although there are different skin types available for Side Navigation and Top Navigation (in order to make the process simpler), you can use either type of skin to change the main menu from one position to the other. When you specify navigation pane settings on the **Setup** tab of the Skin Editor, you can set the **Main Menu Position**. It can be set to **Top** (for Top Navigation), or it can be set to **Left** or **Right** (for Side Navigation).



Also on the **Setup** tab, you can choose to have a fixed header for all screen sizes (web, tablet, mobile), or for web only.

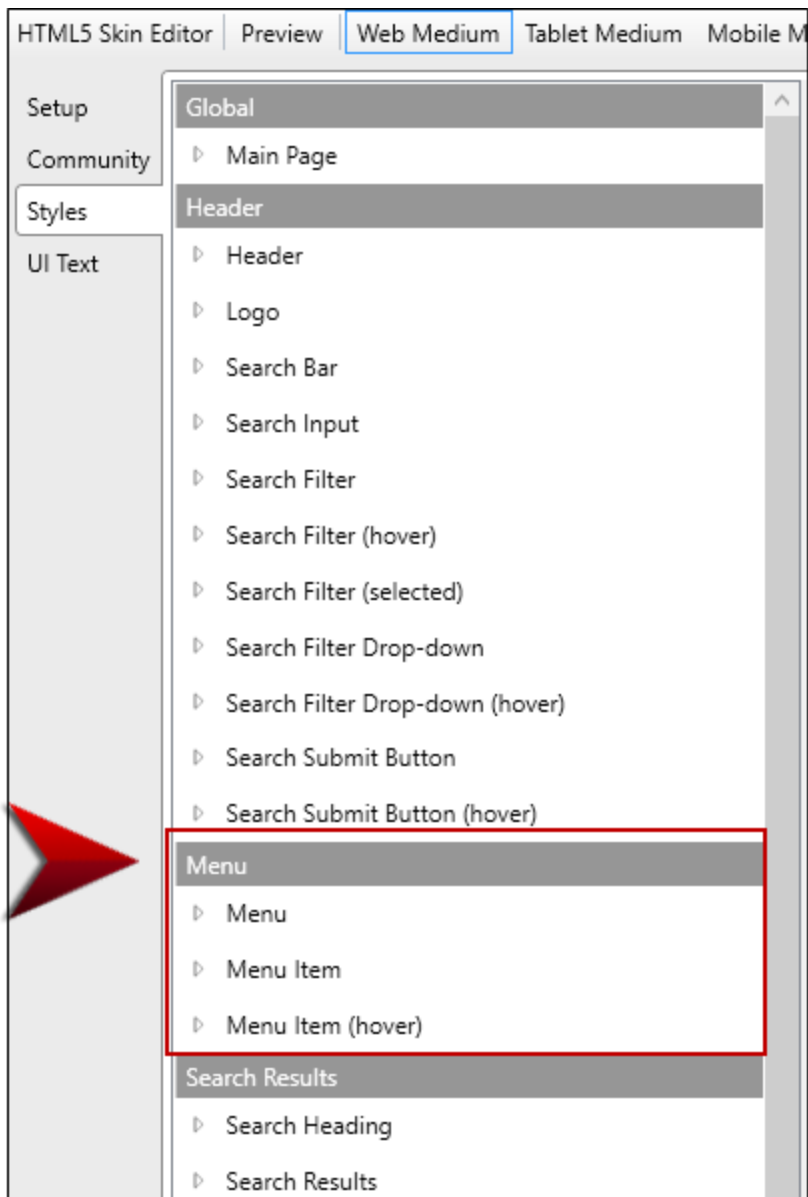


If you have multiple levels of topics in your table of contents (TOC), you will see submenus, which can be opened by clicking on the icon next to the parent navigation item. Whether you position the navigation pane on the right or left side of the screen, the icon will always appear on the right side of the navigation items.

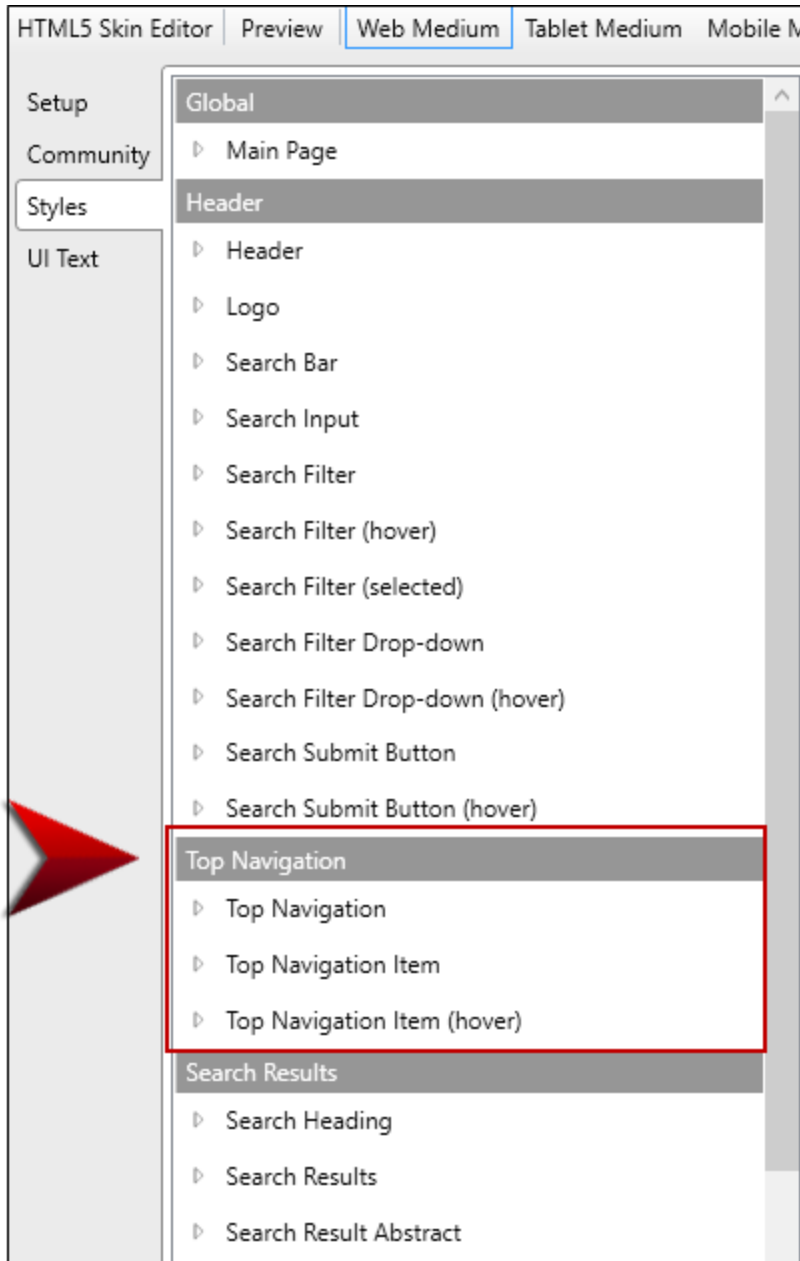


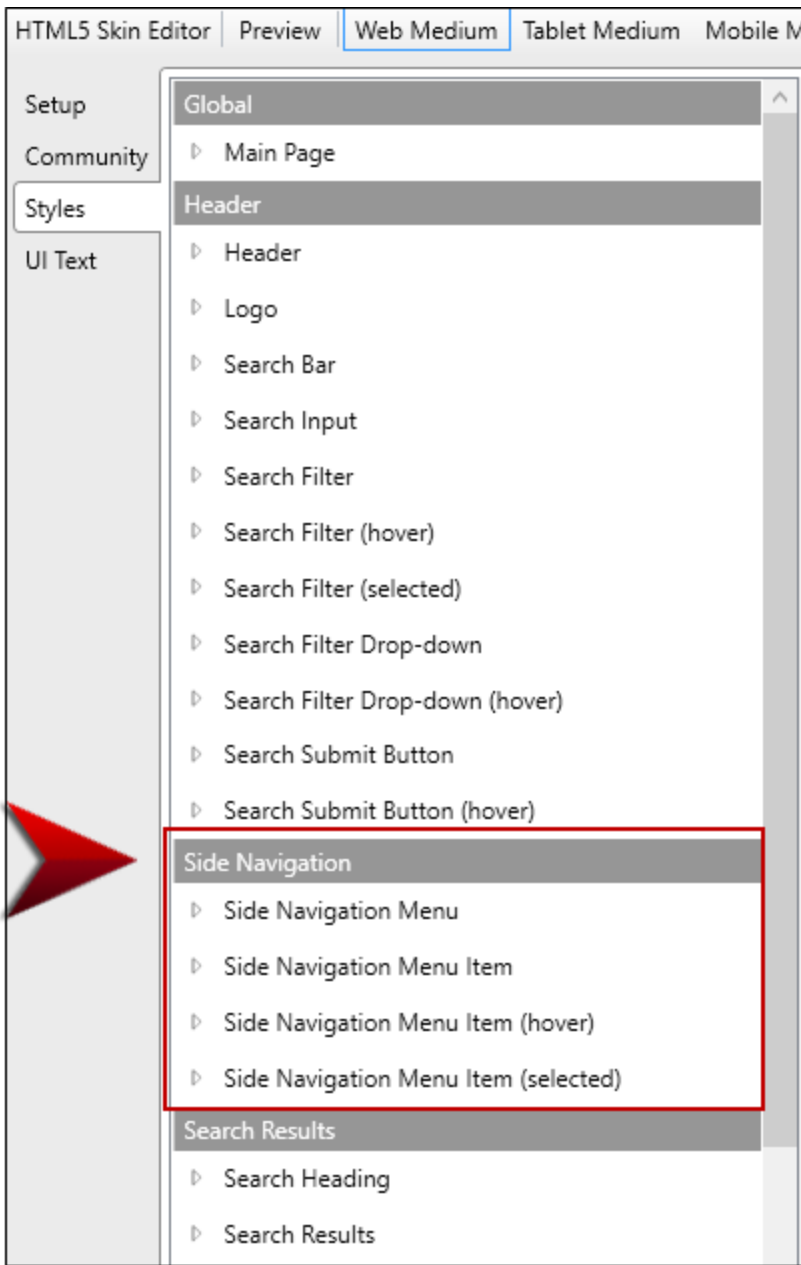
Styling the Skin

When styling the main menu area, previous versions of Flare had a section on the Styles tab called “Menu.”



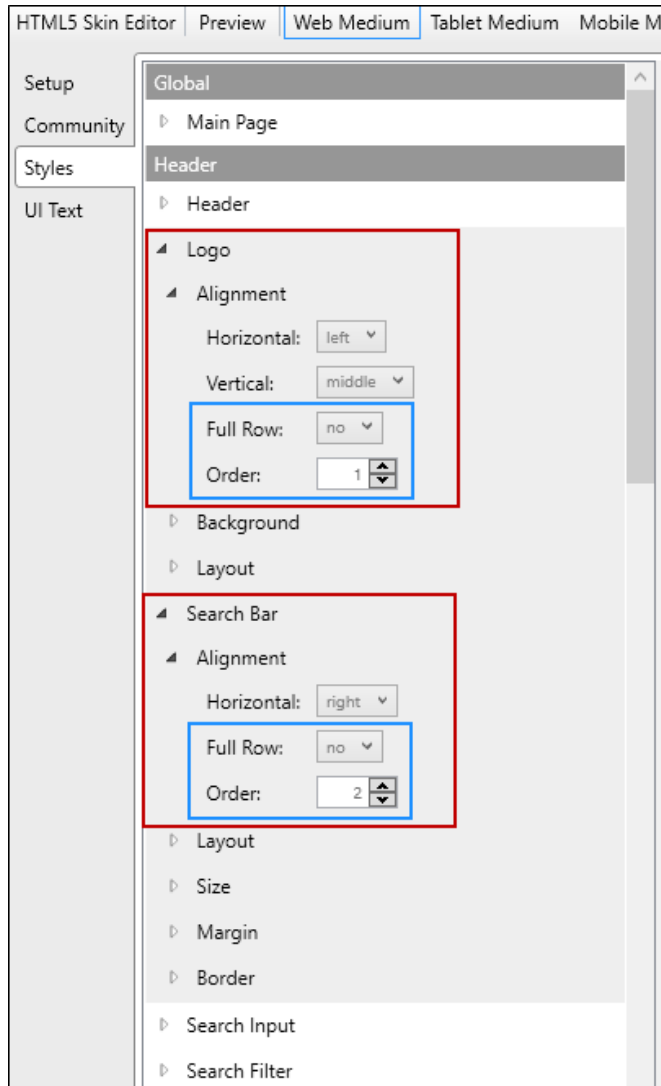
This section is now called “Top Navigation” or “Side Navigation,” depending on the main menu position that is selected on the Setup tab.





Use this section to change the look of the main navigation area in your output. This includes the background, expander icon, font, and more.

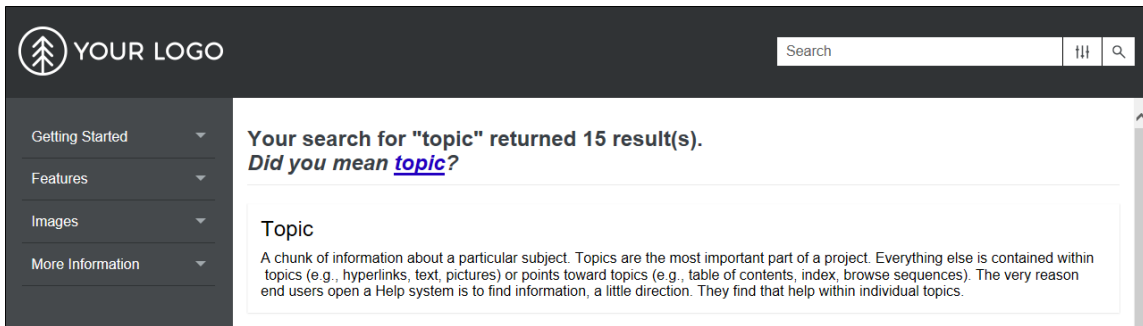
Under some styles, you will also notice some fields called “Full Row” and “Order.” These are flexbox-related options that are used in Side Navigation for aligning the logo and search bar in the header. Top Navigation skins also now have these options for the logo, search bar, and menu.



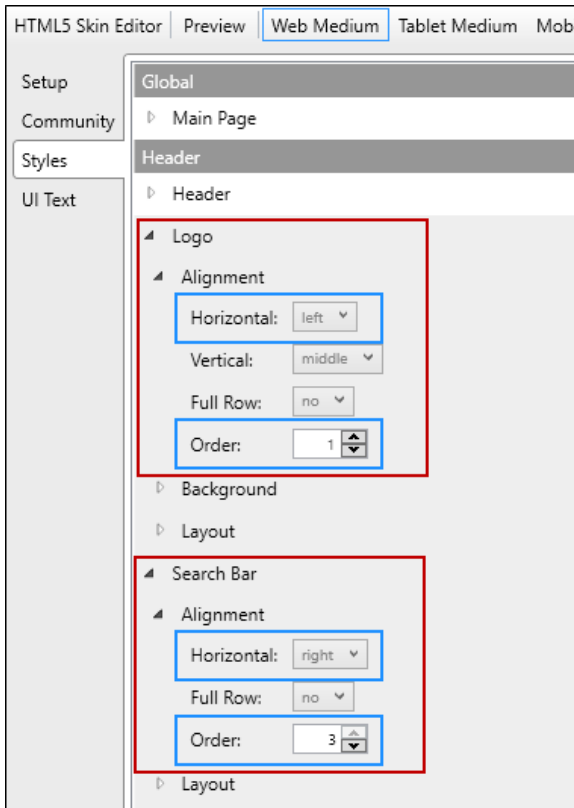
- **Full Row** This option allows the element to take up all of the space horizontally in the header.
- **Order** This option determines which element comes first (1), second (2), or third (3) in the header. Side Navigation has only two elements (logo and search bar), but Top Navigation has three (logo, search bar, and menu).

☆ EXAMPLE

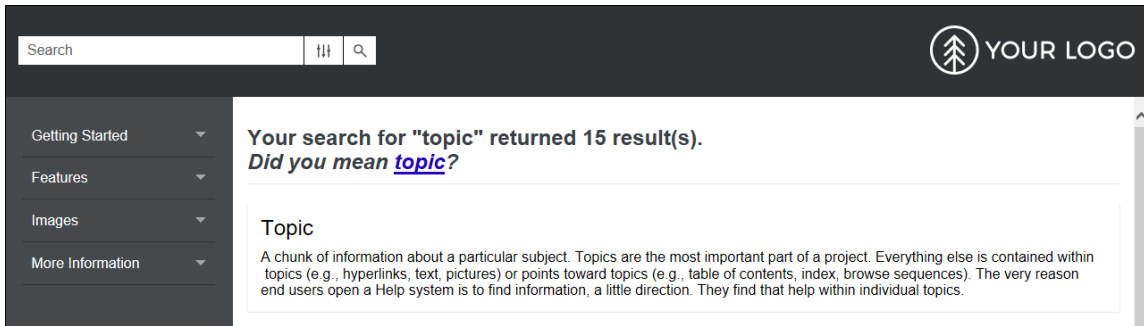
Let's say you add a new Side Navigation skin. Initially it looks like this:



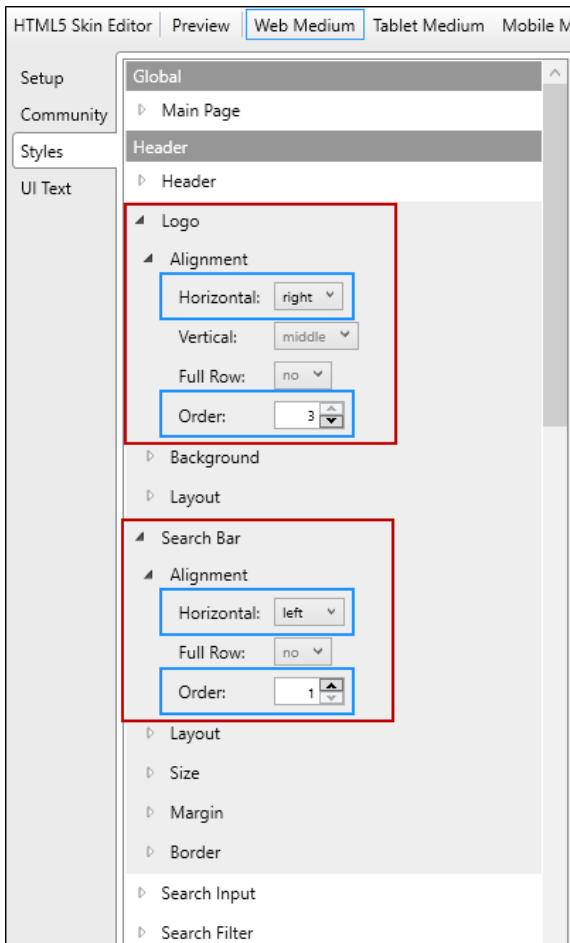
The logo comes first (Order=1) and is positioned left, whereas the search bar comes second (Order=3) and is positioned right.



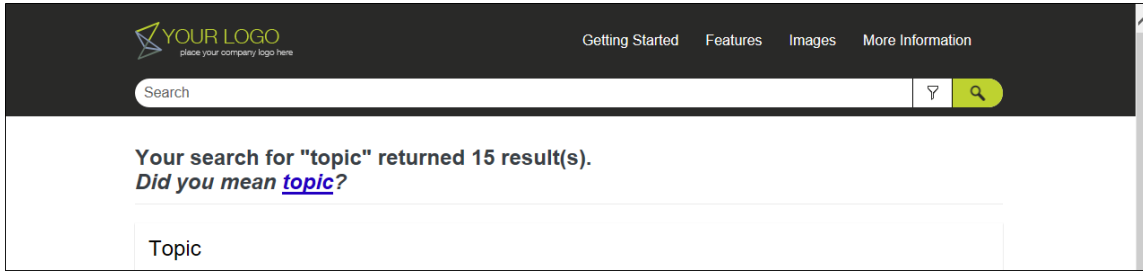
- ☆ Maybe you want to reverse this, placing the search bar first (aligned left) and the logo second (aligned far right).



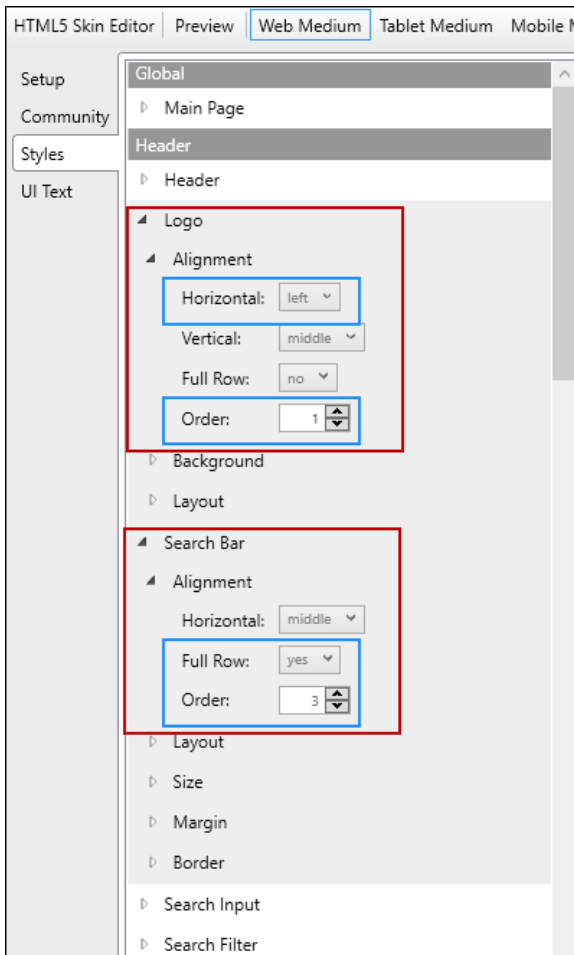
In that case, you would change the settings like this:

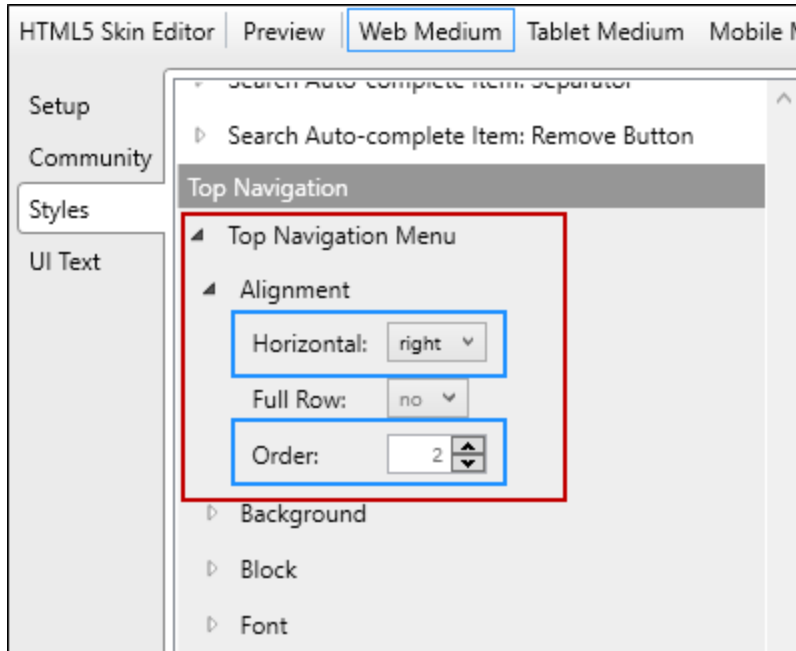


☆ Now suppose you create a new Top Navigation skin. Initially it looks like this:

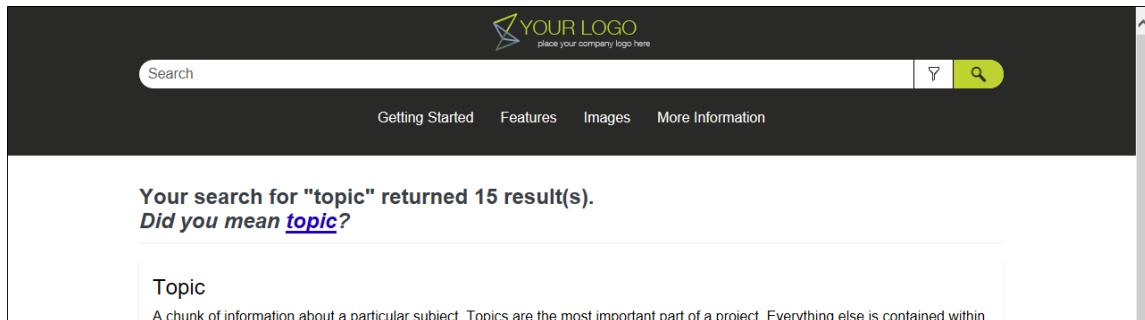


The logo comes first (Order=1) and is positioned left. The menu is second (Order=2) and is positioned right. The search bar is third (Order=3) and is set to take up all the space below the others (Full Row=yes).





Now maybe you want each element to take up all the space on its row, centered, with the logo first, followed by the search bar, and then the menu.





HTML5 Skin Editor | Preview | **Web Medium** | Tablet Medium | Mobile M

Setup
Community
Styles
UI Text

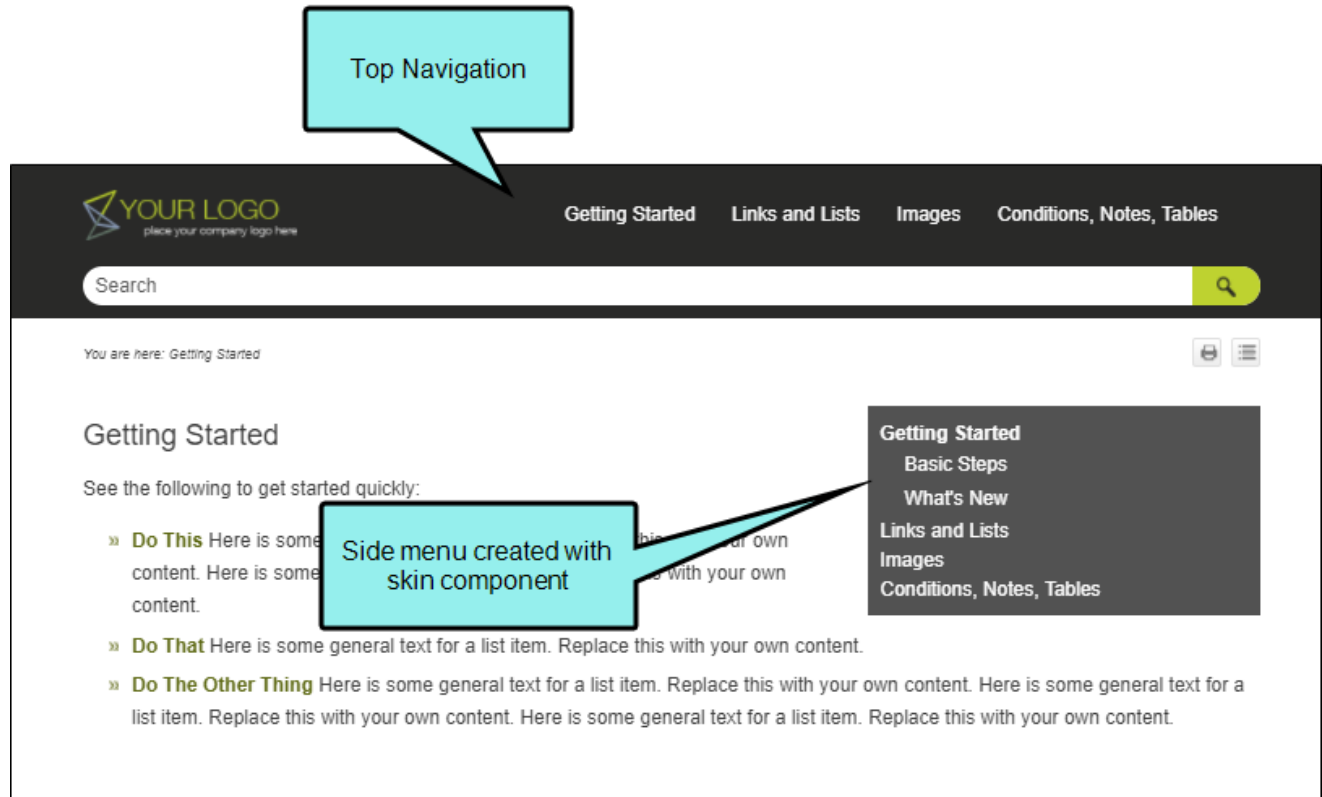
Search Auto-complete Item: Remove Button

Top Navigation

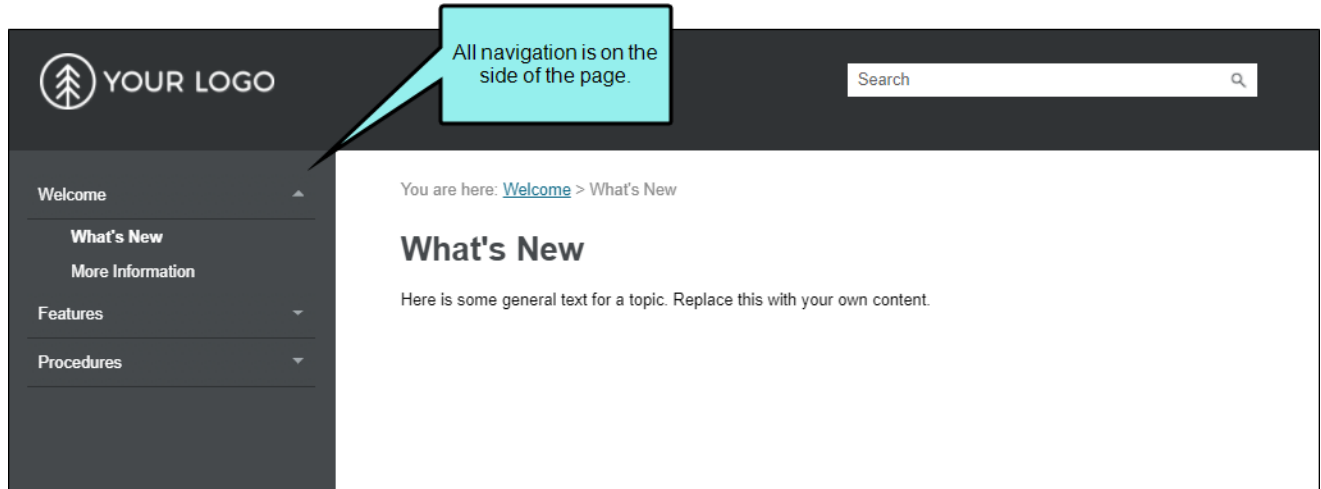
- Top Navigation Menu
 - Alignment
 - Horizontal: middle
 - Full Row: yes
 - Order: 3
- Background
- Block
- Font

What About the Menu Skin Component?

Another difference between Side and Top Navigation output is that a side menu skin component is often used for Top Navigation, so that you can include context-sensitive navigation on the side of topics, in addition to the main links at the top.

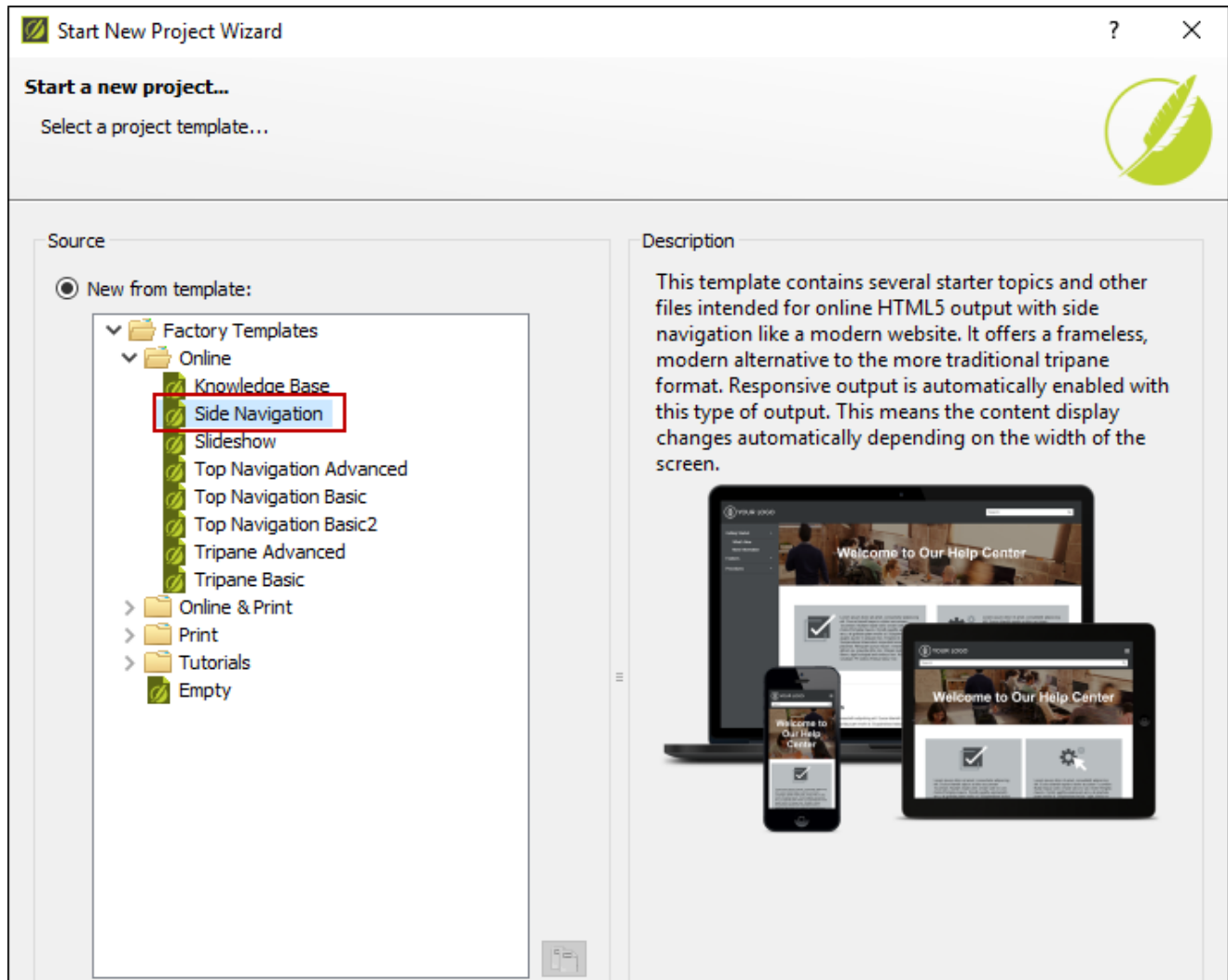


With Side Navigation output, this component is not necessary, because you will already have full navigation on the side of topics.



Side Navigation Template

A Side Navigation template is now available in the New Project Wizard. This template has its Home page and other topics specifically designed to look and work nicely with Side Navigation.



Side Navigation Tutorial

To help you transition to a Side Navigation format, you can work through the new Side Navigation Tutorial.

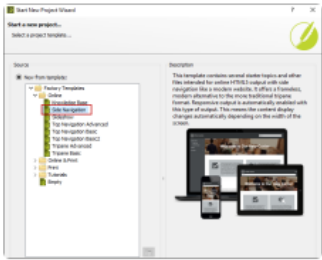
As with the other tutorials, you can click a button at the top of the tutorial page in the online Help to download the tutorial in PDF format.

Side Navigation Tutorial

☑ ☰ 🖨 ✍

Click here to download the PDF.

Welcome to the Flare Side Navigation Tutorial. This tutorial focuses on taking a project that was originally set up for Top Navigation and converting it to Side Navigation output that matches the project template in Flare.



The Side Navigation project template in Flare contains several starter topics and other files intended for online HTML5 output with side navigation like a modern website. It offers a frameless, modern alternative to the more traditional tripane format. This template starts you out with one HTML5 target. Responsive output is automatically enabled with this type of output. This means the content display changes automatically depending on the width of the screen.

➤ **USING THIS TUTORIAL ONLINE OR PRINTING IT**

➤ **START THE TUTORIAL**

Using Flare’s project templates, this tutorial takes you through the steps for transitioning from a Top Navigation output to a Side Navigation output. This includes removing Top Navigation elements and changing the look and feel of the Side Navigation output.

CHAPTER 4

Elasticsearch

In previous versions, you had a choice between MadCap Search and Google Search for your online Help. Now there is a third option, Elasticsearch. This powerful search engine provides numerous unique, configurable options, including "fuzzy matching" (i.e., matching similar words), predictive search, and auto-completion.

Elasticsearch is enabled by two web services, one used by Flare and the other used by Elasticsearch. The Elasticsearch web service runs a portal that allows you to manage the targets, topics, and indexes employed by the Elasticsearch engine in your server-based HTML5 target.

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Comparison of the Search Engine Types

There are benefits to any of the search methods offered by Flare. Some users might prefer the search results returned by Google. However, others might prefer the results returned by MadCap. Or some users might want all of the configurable options provided by Elasticsearch.

✔ **TIP:** To determine the type of search that is best for you, we recommend that you generate different outputs using each method. Then perform several different searches and see which results you like best.

	Elasticsearch	Google Search	MadCap Search
Time and Effort to Set Up	Setting up Elasticsearch is done within the Target Editor and Destination Editor in Flare. Web servers also need to be configured to support Flare, along with the Elasticsearch service.	Setting up a Google custom search engine (CSE) and performing other necessary tasks requires a combination of steps in both Google and Flare. This can take a bit of time to complete. However, it is usually just a one-time setup.	✔ Setting up MadCap Search in a Flare project takes only a few seconds.
Public Versus Local Output	Output must be published on a server in order to use the full capability of Elasticsearch.	Output must be available publicly so that you can use Google. Output cannot be behind a firewall.	✔ Output can be searched whether it is available publicly or locally.
Number of Outputs	✔ You can manage multiple HTML5 targets that use Elasticsearch through the Content Services Portal.	✔ You can add multiple folders/sites to be included in your Google custom search engine (CSE). Each of these sites can be a separately published Flare output. When users search from one of the published Flare outputs, results will display for all of the outputs.	Searches will include results for only the Flare output that is open.

	Elasticsearch	Google Search	MadCap Search
Other File Types	✓ Most file types are included in the search results.	✓ If you have added other types of files (e.g., PDF) to the site(s) associated with your CSE, they may be included in search results.	In order to include file types such as PDF in your search results, you need to generate and publish server-based output.
Search Tailored to Flare Projects	Elasticsearch does not provide any direct mapping of search criteria to the structure of a Flare project.	Google does not recognize the unique characteristics of a Flare project (e.g., index keywords, glossaries). Therefore, those elements will have no effect on how Google ranks pages in the results.	✓ MadCap Search rankings are specifically tailored for Flare users. They take into account not only H1-H6 headings, but also index keywords, glossary terms, etc.
Glossary Definitions in Results	Elasticsearch does not provide an option to include glossary terms in your search results.	Google will not fetch your project's glossary terms and feature them at the top of search results.	✓ MadCap Search will fetch your project's glossary terms and feature them at the top of search results.
Incorrectly Typed Searches	✓ The partial-word search and fuzzy match settings allow for numerous searches to be returned when these settings are enabled.	✓ If an end user incorrectly enters a search term (e.g., types "Tble" instead of "Table"), Google will often guess the correct term and show results anyway.	Incorrectly typed search terms will not return results.

	Elasticsearch	Google Search	MadCap Search
Search and Indexing Speed	<p>✔ The administrator portal allows for the search indexes to be managed closely. This will assist in keeping search result times optimal.</p>	<p>Search results might lag at times, depending on the size of the output and whether Google is finished with the indexing (i.e., making your output available for searches).</p> <p>Google will index your pages automatically over time, but it can take awhile, sometimes weeks. You can use some of the steps below to help speed up this process.</p> <p>In addition, there are a number of different factors that can determine how fast your site is indexed, including:</p> <ul style="list-style-type: none"> ■ Whether your output has a sitemap ■ The structure of your output ■ How content is linked (regular links are best to make it easier for Googlebots to crawl) ■ Popularity of the site (the number of other sites that link to your output) 	<p>✔ Search results might be faster because the output is immediately indexed once it is generated. You do not need to spend any extra time indexing your pages or waiting for search results to appear.</p>

	Elasticsearch	Google Search	MadCap Search
Mobile Devices	<p>✔ Search results always come from a server, so you do not need to be concerned about the ability of the mobile device to handle the information.</p>	<p>✔ Search results always come from a server, so you do not need to be concerned about the ability of the mobile device to handle the information.</p>	<p>Search results are “chunked” and then collapsed so that they can be displayed when a search is performed. This is usually okay on PCs, but if you try to perform a search on a mobile device, the results might be slow or even crash because the device cannot handle the number of search results.</p>
Advertisements	<p>✔ No advertisements are included in search results.</p>	<p>Users might see advertisements in search results.</p>	<p>✔ No advertisements are included in search results.</p>
Auto-Complete Results	<p>✔ You can enable multiple options to include a mix of personal and global searches on your output. There is also an option to include project content information such as topic titles and the file path in your project.</p>	<p>While Google Search does provide auto-complete results, it does not provide the ability to customize these results.</p>	<p>There are no options available for auto-complete results.</p>
Predictive Search	<p>✔ There are multiple options that allow you to obtain predictive results when searching, especially when using auto-complete options.</p>	<p>Google Search provides a measure of predictive results, although it is not customizable within Flare.</p>	<p>MadCap Search does not offer any predictive methods in obtaining search results.</p>


General Steps for Using Elasticsearch

These are the steps needed to set up Elasticsearch.

1. **Set Up Server** Configure a remote server to store your search indexing data. This is usually done by a network administrator. See "Installing Elasticsearch on a Remote Server" on page 55.
2. **Set Search Engine** Select Elasticsearch as the search engine in the Target Editor. See "Enabling Elasticsearch Through the Target Editor" on page 61.
3. **Create Destination Files** Add and configure primary and Elasticsearch destination files so you can publish your output and search results. See "Creating Publishing Destinations for Elasticsearch" on page 67.
4. **Connect Destinations with Target** Associate your publishing destinations with the HTML5 target. See "Associating Elasticsearch Destinations with a Target" on page 68.
5. **Generate and Test Output** Build the HTML5 target. When the build is near completion, you will notice a new icon display in the system tray. This is for the MadCap Process Manager, which will handle the web services required for Elasticsearch if you are running locally on your machine. See "MadCap Process Manager" on page 69.

Once the build is complete, start testing your output with a few searches to ensure Elasticsearch is working in accordance with your configuration.

6. **Manage Search Indexes** As your Elasticsearch output is searched, you may want to control the size of the indexes for your target. See "Content Services Portal" on page 70.

 **NOTE:** You can also modify the appearance of your auto-complete suggestions in the search results. See the Flare Skins Guide or the Flare online Help for more information.

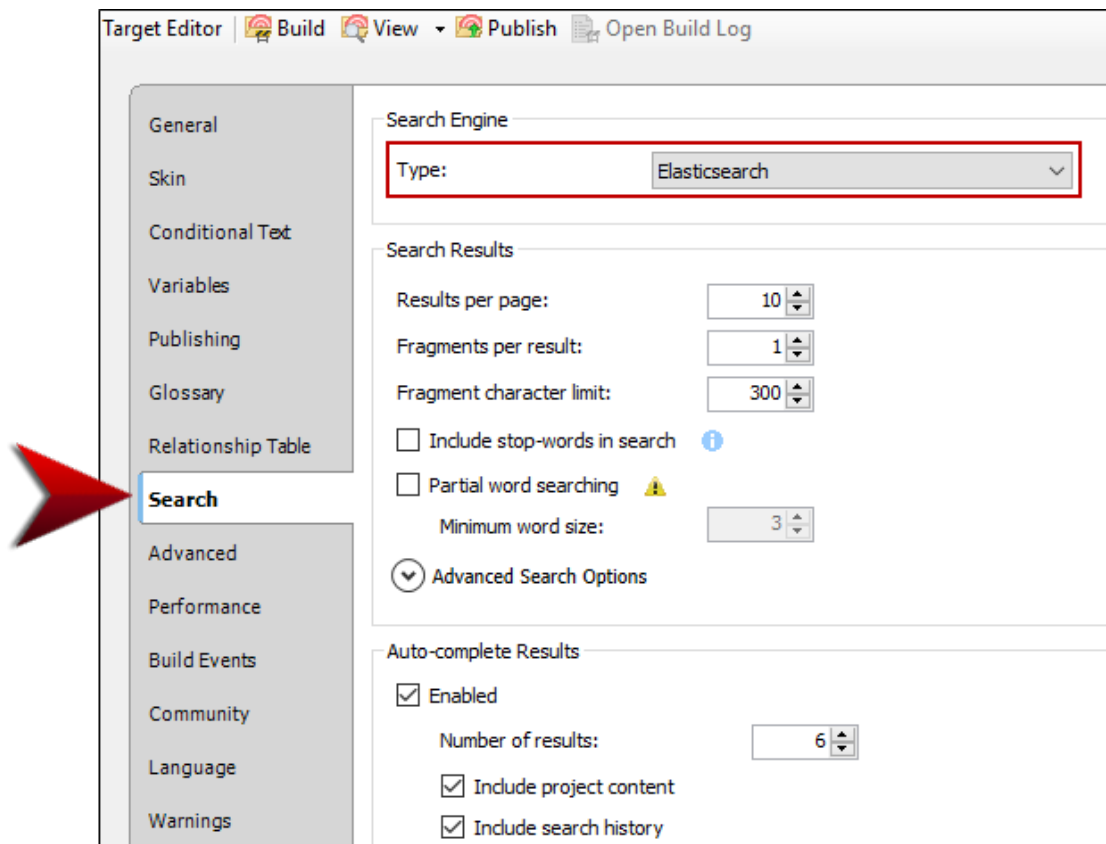
☆ EXAMPLE

Bob wants to use Elasticsearch with his HTML5 output.

First, he sends his network administrator the steps for setting up a Elasticsearch remote server .

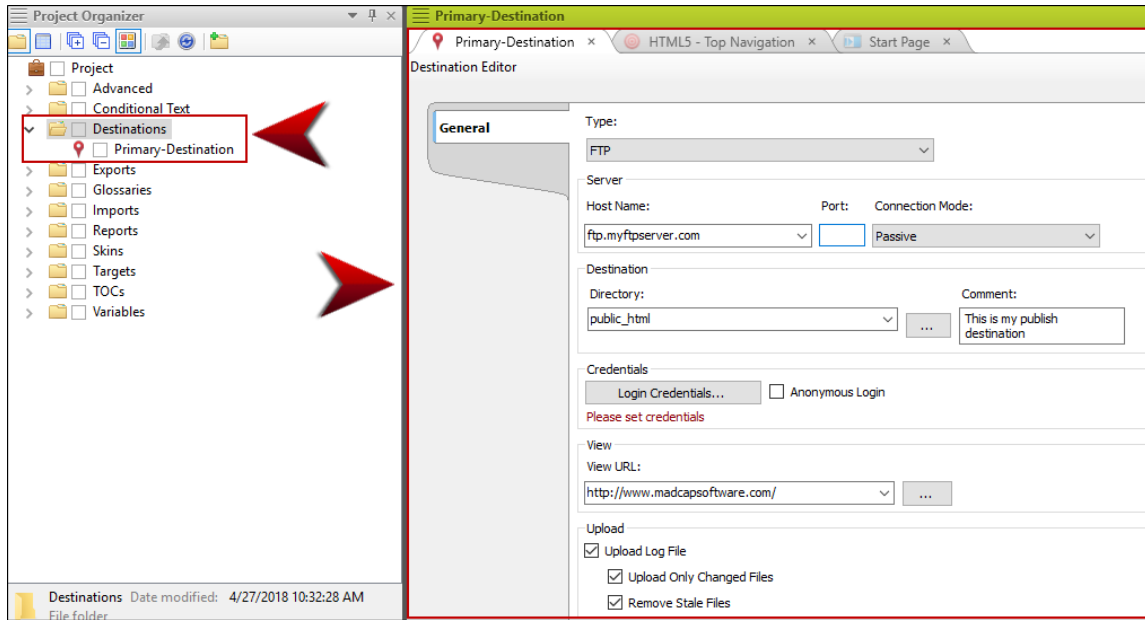
After the network administrator finishes setting up ther server, she sends Bob the URL for it. In this case, let’s say the URL is `https://ourelasticsearchservices.fictionsoft.com`.

Bob opens his HTML5 target, selects the **Search** tab, and chooses **Elasticsearch** as the search engine type.



He also decides which Elasticsearch options on that tab he wants to use and sets them accordingly.

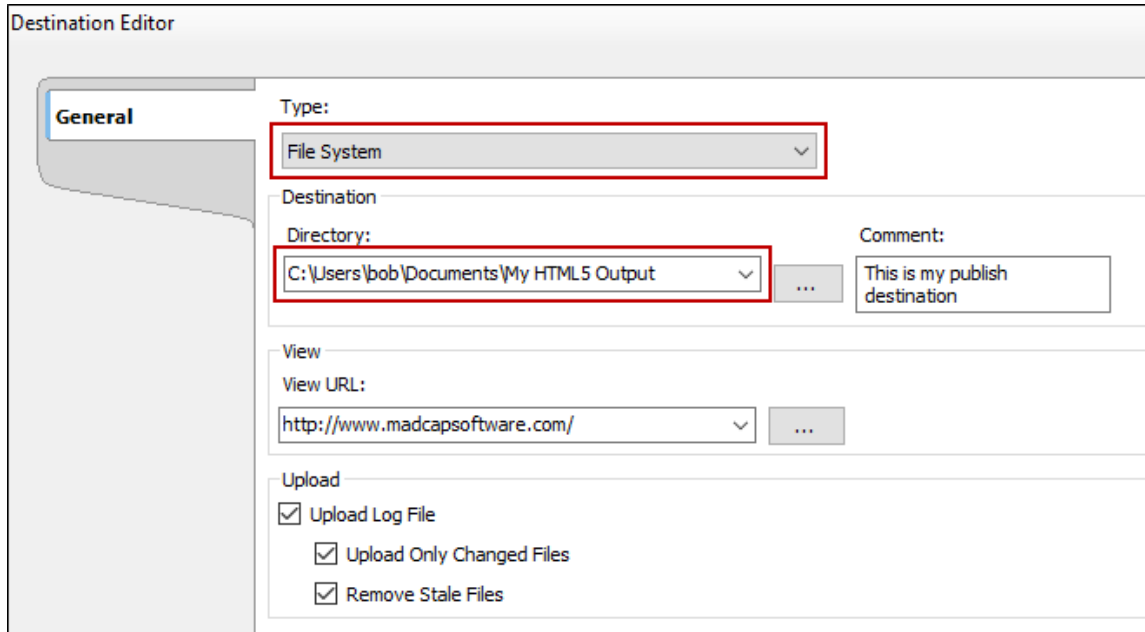
- ☆ Next, Bob creates a primary publishing destination. This is the destination where he will send his output.



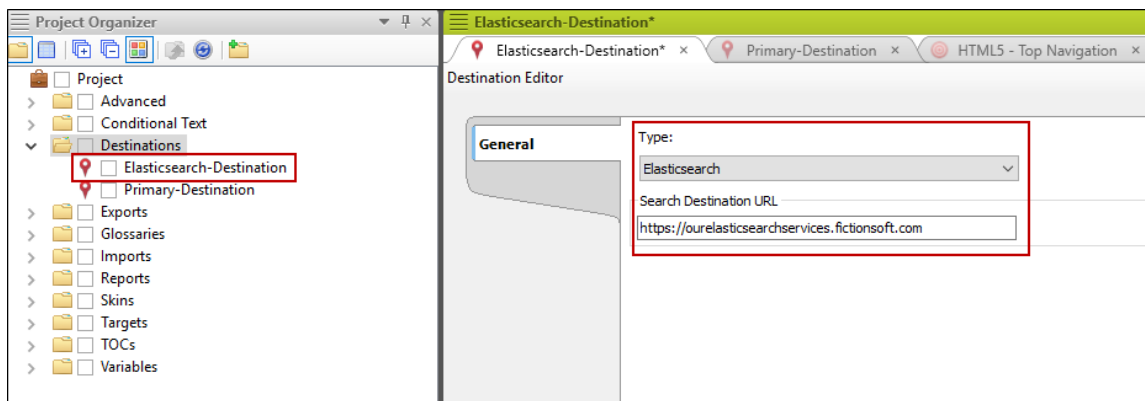
Let's say Bob needs to upload his output to this location:

help.fictionsoft.com/myoutput/

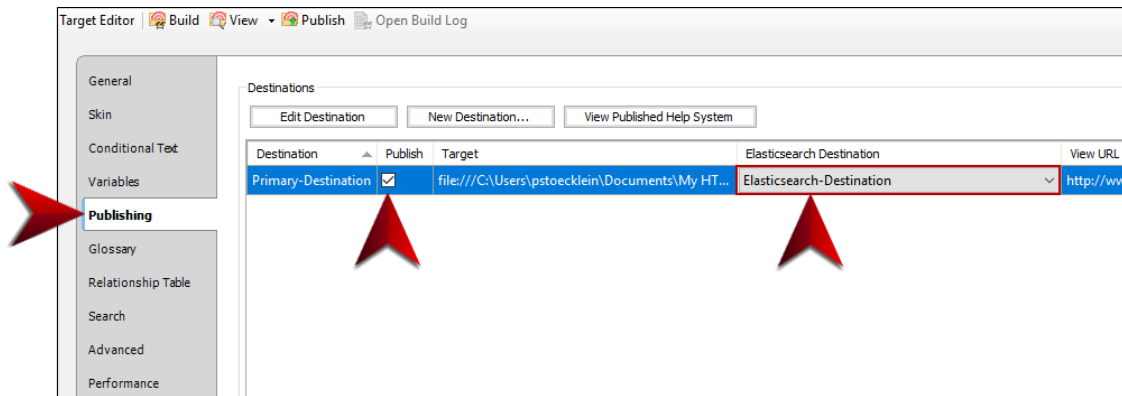
One option is that Bob could use file transfer protocol (FTP) to copy his output directly up to the server where his output will be hosted. But suppose Bob prefers to use a third-party tool (say, FileZilla) to transfer his output files to the server. In that case, Bob chooses **File System** as the type, and for the directory he selects a folder that he created in his My Documents folder.



Now Bob creates an Elasticsearch destination file. In this file, he chooses **Elasticsearch** as the type, and he enters the URL that his network administrator gave him (<https://ourelasticsearchservices.fictionsoft.com>).



☆ Next, Bob returns to his target and opens the **Publishing** tab. In this tab, he places a check mark next to his primary destination. Then in the **Elasticsearch Destination** cell, he chooses the other destination file.



After saving all his changes, Bob builds the target. When that is done, he clicks the **Publish** button in the Target Editor, which copies the output files to the local folder he set up in his My Documents directory.

Finally, Bob uses his third-party tool to transfer the output files from that My Documents folder up to their final destination (help.fictionsoft.com/myoutput/). When users access that output, the search function will be using Elasticsearch features.

Installing Elasticsearch on a Remote Server

There are three sections to installing Elasticsearch on a remote server. These are steps usually completed by a network administrator.

1. Installing prerequisites on the remote server
2. Installing the Elasticsearch service
3. Configuring the Elasticsearch web application

HOW TO INSTALL PREREQUISITES FOR THE REMOTE SERVER

1. Create and configure your web server on Internet Information Services (IIS).

 **NOTE:** Ensure that ASP.NET 4.5 is installed on the web server.

2. Download and install .NET Core 1.1.6 Windows Hosting Bundle Installer.
See <https://www.microsoft.com/net/download/dotnet-core/runtime-1.1.6>.
3. Reboot your web server.
4. Download and install the 64-bit Java SE Development Kit (JDK) version 8 to your remote server.
5. See <http://www.madcapsoftware.com/downloads/jdk.aspx>.
6. When JDK 8 has been successfully installed, open the Environment Variables dialog on your server.
7. Add a System Environment variable called "JAVA_HOME" that is pointing to the path where JDK was installed (i.e., C:\Program Files\Java\jdk1.8.0_171\).
8. Double-click the **Path** system variable.
9. Click **New**.
10. Add the string '%JAVA_HOME%\bin'.
11. Click **OK**.
12. To verify that JDK 8 is working properly, open a command prompt window.

13. At the command prompt, type `javac` and click the **Enter** button. If you see `javac` options display below the command prompt, JDK 8 is working properly.

```
C:\Users\Administrator>javac
Usage: javac <options> <source files>
where possible options include:
-g Generate all debugging info
-g:none Generate no debugging info
-g:<lines,vars,source> Generate only some debugging info
-nowarn Generate no warnings
-verbose Output messages about what the compiler is doing
-deprecation Output source locations where deprecated APIs are used
-classpath <path> Specify where to find user class files and annotations processors
-cp <path> Specify where to find user class files and annotations processors
-sourcepath <path> Specify where to find input source files
-bootclasspath <path> Override location of bootstrap class files
-extdirs <dirs> Override location of installed extensions
-endorseddirs <dirs> Override location of endorsed standards path
-processor:<none,only> Control whether annotation processing and/or compilation is done.
-processor <class1>[,<class2>,<class3>...] Names of the annotation processors to run; bypasses default discovery process
-processorpath <path> Specify where to find annotation processors
-parameters Generate metadata for reflection on method parameters
-d <directory> Specify where to place generated class files
-s <directory> Specify where to place generated source files
-h <directory> Specify where to place generated native header files
-implicit:<none,class> Specify whether or not to generate class files for implicitly referenced files
-encoding <encoding> Specify character encoding used by source files
-source <release> Provide source compatibility with specified release
-target <release> Generate class files for specific VM version
-profile <profile> Check that API used is available in the specified profile
-version Version information
-help Print a synopsis of standard options
-Akey[=value] Options to pass to annotation processors
-X Print a synopsis of nonstandard options
-J<flag> Pass <flag> directly to the runtime system
-Werror Terminate compilation if warnings occur
@<filename> Read options and filenames from file


C:\Users\Administrator>_
```

HOW TO INSTALL ELASTICSEARCH ON THE REMOTE SERVER

1. Navigate to the **Elasticsearch** folder at the location where you have Flare installed (e.g., C:\Program Files\MadCap Software\MadCap Flare 14\Flare.app\Resources\Elasticsearch).
2. Copy this Elasticsearch directory from your local machine to the remote server. The directory can be copied anywhere on the remote server.
3. Open the `elasticsearch.yml` file in a text editor from the `Elasticsearch\config` directory you just copied over to the remote server.
4. Find the string `'http.port: 9200'` in this file. When you find it under the Network section, remove the `#` character from in front of the `"http.port: 9200"` string.
5. Save your changes in this file.
6. Open a command prompt window and navigate to the location of the copied `Elasticsearch\bin` directory.
7. Type `elasticsearch-service.bat install` and click **Enter**.
8. Type `elasticsearch-service.bat start` and click **Enter**. Elasticsearch is now running on your remote server.
9. Copy the **Web.ContentServices** folder from your local machine where you have Flare installed (e.g., C:\Program Files\MadCap Software\MadCap Flare 14\Flare.app\Resources\WebHelp2\ContentServices\Web.ContentServices).
10. Place this copy of the `Web.ContentServices` folder in the following location on the remote server: `C:/inetpub/wwwroot`.
11. Create a folder titled `"logs"` within the `Web.ContentServices` folder on the remote server.
12. Within the `Web.ContentServices` folder, open the `appsettings.json` file.


13. Under **ConnectionStrings**, update the path to be used for the **DefaultConnection**.

```
{
  "ApplicationInsights": {
    "InstrumentationKey": ""
  },
  "Logging": {
    "IncludeScopes": false,
    "LogLevel": {
      "Default": "Debug",
      "System": "Information",
      "Microsoft": "Information"
    }
  },
  "ConnectionStrings": {
    "DefaultConnection": "Data Source=\\%LocalAppData%\\MadCap Software\\ContentServices\\Web.ContentServices\\Indices.db",
    "ElasticsearchUrl": "http://localhost:9601"
  },
  "ContentServicesStartupConfigSettings": {
    "DataRootDir": "%LocalAppData%\\MadCap Software\\ContentServices\\Web.ContentServices"
  }
}
```

 **NOTE:** Elasticsearch uses port 9200 by default. If you wish to change the port number, you can specify the port number in the DefaultConnection string (e.g., http://localhost:9601). However, the port number must also match the http.port field in the elasticsearch.yml file.

14. Under **ContentServicesStartupConfigSettings**, update the path to be used for the **DataRootDir**.

```
{
  "ApplicationInsights": {
    "InstrumentationKey": ""
  },
  "Logging": {
    "IncludeScopes": false,
    "LogLevel": {
      "Default": "Debug",
      "System": "Information",
      "Microsoft": "Information"
    }
  },
  "ConnectionStrings": {
    "DefaultConnection": "Data Source=\\%LocalAppData%\\MadCap Software\\ContentServices\\Web.ContentServices\\Indices.db",
    "ElasticsearchUrl": "http://localhost:9601"
  },
  "ContentServicesStartupConfigSettings": {
    "DataRootDir": "%LocalAppData%\\MadCap Software\\ContentServices\\Web.ContentServices"
  }
}
```


 **NOTE:** Ensure that the paths you provide for DefaultConnection and DataRootDir in the appsettings.json file have read/write permissions for the user account logging into the web server.

HOW TO CONFIGURE THE CONTENT SERVICES WEB APPLICATION

1. Install the URL Rewrite Module. This is necessary to enable IP address security restrictions to work in your web.config file.

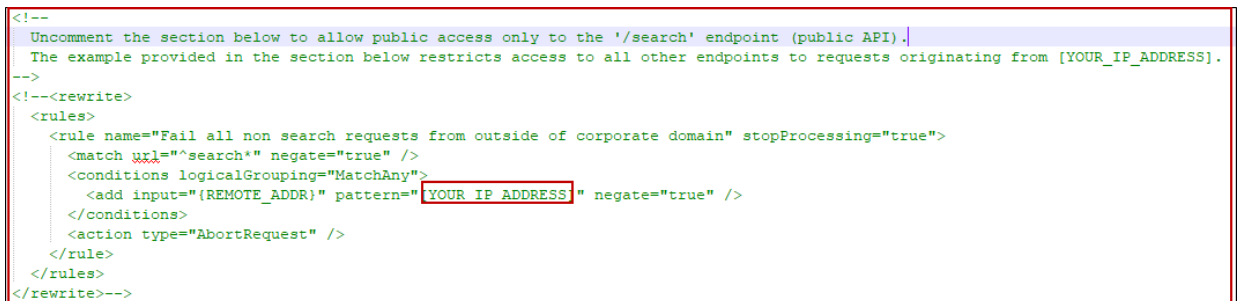
See <https://www.iis.net/downloads/microsoft/url-rewrite>.

2. Within the **Web.ContentServices** folder, open the **web.config** file.
3. Remove the comment characters from the **<rewrite>** and **</rewrite>** tags in this file.



The screenshot shows a portion of the web.config file. A red box highlights the <!--> tags around the <rewrite> and </rewrite> tags. A blue callout box with a red arrow points to these tags, containing the text: "Remove the comment dashes in the <rewrite> and </rewrite> tags." The code within the highlighted area includes a rule named "Fail all non search requests from outside of corporate domain" with a match url of "^search*" and a condition for REMOTE_ADDR matching the pattern [YOUR_IP_ADDRESS].

4. Modify **YOUR_IP_ADDRESS** with your desired IP address pattern . This restricts administrator access to your Content Services Portal for requests that originate only from IP addresses matching this pattern.



This image shows a close-up of the modified code from the previous screenshot. The <!--> tags have been removed from the <rewrite> and </rewrite> tags. The <add input="REMOTE_ADDR" pattern="[YOUR_IP_ADDRESS]" negate="true" /> line is highlighted with a red box, indicating where the user should enter their specific IP address pattern.

5. Open IIS Manager.
6. Right-click **Application Pools**, and select **Add Application Pool**.
7. In IIS Manager, navigate to **Sites > Default Web Site**.
8. Right-click **Default Web Site** and select **Add Application**.
9. Enter the name of the **Alias** for your Elasticsearch website.

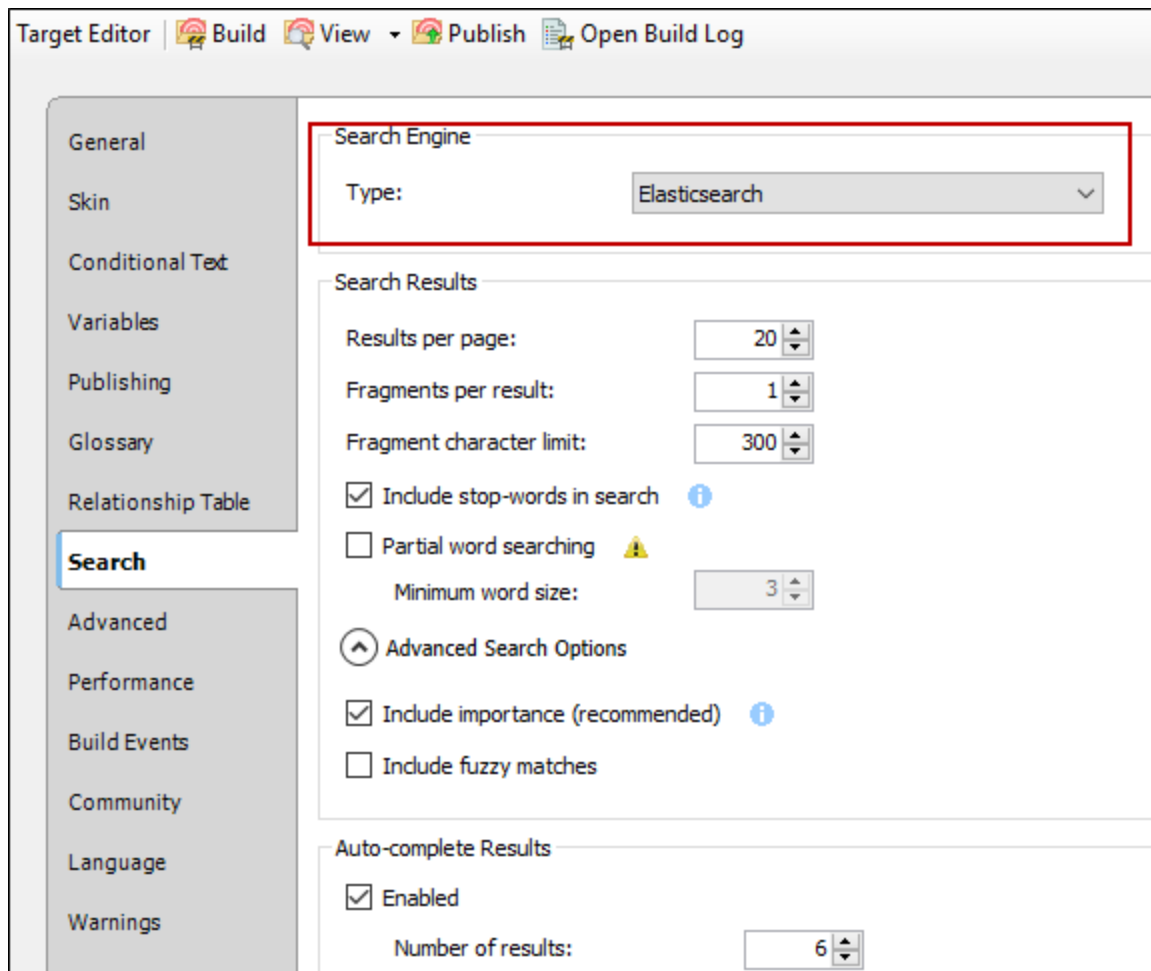
10. Click the **Select** button and choose your Application pool.

 **NOTE:** You can use the default Application pool or create a new one for this service.

11. Click the ellipsis button next to the **Physical path** field.
12. Select the **C:\inetpub\wwwroot\Web.ContentServices** directory.
13. Click **OK**. Your Content Services application is now displayed under Default Web Site in IIS.


Enabling Elasticsearch Through the Target Editor

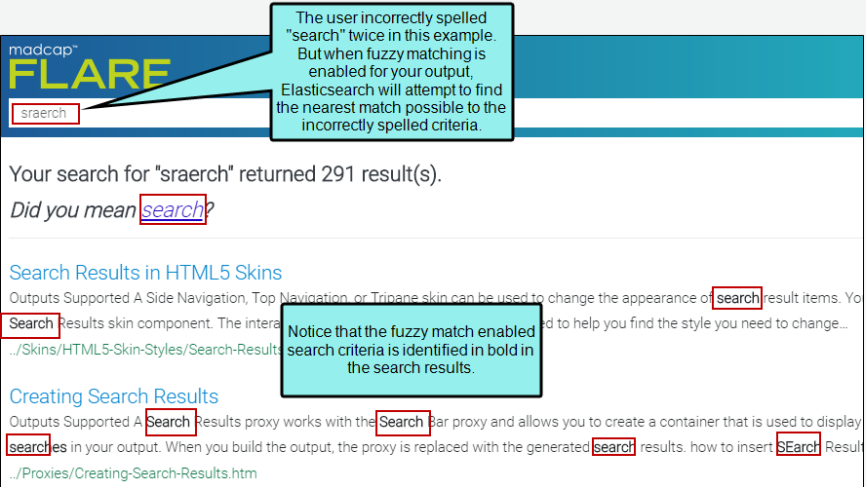
1. Open the target.
2. Click the **Search** tab.
3. Click the drop-down in the **Type** field and select **Elasticsearch**.




4. Configure the following options you need to enable Elasticsearch for your output.

Field Name	Description
Search Results	
Results Per Page	You can change the number of search results that appear on each page. This makes it easier for users to navigate between pages of search results and improves loading times, especially for users who access your output from a mobile device. Setting a reasonable number of results per page also makes it easier for search indexing services (i.e., spiders, crawlers, or bots) to locate pages in your output, improving search results. You can set between 1-100 search results per page.
Fragments Per Result	This sets the number of fragments that contain the text of the searched item shown in the preview text. The fragment level can be set anywhere from 0-5. This applies to both search results and Autocompletion Types. One example is if you typed in the word "Search" in the search bar. The search result extract might display like this: <ul style="list-style-type: none"> ■ "Search can be conducted from multiple locations. There are three types of searches that can be selected in the Target Editor. Use the search bar to locate the feature you want to use." ■ In this case, the Fragments Per Limit level is set to 3.
Fragment Character Limit	This sets the character limit of the fragment phrase used in the search.
Include stop-words in search	Flare has a hard-coded stop words list that works behind the scenes to filter out common structure-class words (i.e., function words) from search operations. This means the Flare search engine excludes words (e.g., "an," "for," "of, and "the") by default. However, if you want the search engine to search for queries with these words, you can include the stop words list in search.

Field Name	Description
Partial word searching	<p>This allows part of a word to be searched in the target database. For example, the string "sear" could return results for "search." The minimum word size field can be set from 3-100.</p> <div data-bbox="500 363 1451 527" style="border: 2px solid orange; padding: 10px;"> <p> NOTE: Enabling this setting could increase the build time and the size of the search index for your target.</p> </div>
Advanced Search Options	
Include Importance (recommended)	<p>In HTML5 output, the Flare search engine uses a combination of factors to rank search results. When you search, the search engine considers the number of links to a topic (Importance) as well as the number of times a search term appears in a topic. This gives you the most accurate results. You can choose to turn off Importance and search using only the number of search term hits in each topic. This is not recommended unless you have one topic that is linked to so many times that it would skew your search results.</p>

Field Name	Description
<p>Include fuzzy matches</p>	<p>Fuzziness occurs when two words are spelled in such a similar fashion that they could be considered the same word. There are several instances of fuzziness that can take place:</p> <ul style="list-style-type: none"> ■ Substitution: tabs could be construed as tags ■ Insertion: tab could be construed as table ■ Deletion: server could be construed as sever ■ Transposition: file could be construed as flies ■ Multiple edits: imeg > image. The first edit was substituting e for i. The second edit was inserting e at the end of the string to find the word image. <p>By enabling this setting, this allows the following fuzzy matches:</p> <ul style="list-style-type: none"> ■ Allows zero edits for strings of one or two characters (i.e., to, by, on) ■ Allows one edit for strings between three to five characters (i.e., rnu could be construed as run, flies could be construed as file, hleps could be construed as helps) ■ Allows two edits for strings greater than five characters (i.e., sievrly could be construed as severely) 

Field Name	Description
	<div style="border: 2px solid orange; padding: 10px;"> <p> NOTE: Sometimes a search string is stemmed when displaying the search results. Stemming is when a word is reduced to its root. For example, say you enter a search criteria for "important." If this word is stemmed, then Elasticsearch may return fuzzy matches for "importing." This occurs because the initial search criteria has been stemmed to the root "import."</p> </div>
Auto-complete Results	
Enabled	This option enables the other options in this area. If this box is not checked, all of the other options in this area are disabled.
Number of results	This field sets the limit of personal searches that display in the drop-down while entering the search string. This can be set from a value of 1-25.
Include project content	This displays the topic title, the path of where the topic resides in your project, and the file name based on the search criteria. These results are displayed with a topic icon.
Include search history	This includes a mix of personal and global searches in the output.
Global search threshold	<p>This threshold determines the minimum number of times a term must be searched from unique IP addresses before it becomes a global search term. This threshold can be set from a value of 0-10000.</p> <ul style="list-style-type: none"> Assuming that this field is set to a value of 50, if the term "auto-completion" is searched from 49 unique IP addresses on your HTML5 output, "autocomplete" does not become a global search term until that term is searched from a 50th unique IP address.
Sitemap	
Generate Sitemap	This box should be checked to generate the sitemap required for Elasticsearch on your output.


Field Name	Description
Web URL	This is the URL used for your published output.
Administrator Tools	
Target GUID	Provides the key used to identify and link a target to the corresponding Elasticsearch index.
Generate GUID	Generates the key to be used by the target for the Elasticsearch index.
Launch Content Services	Opens the target in the content services portal. You can manage your targets, and search indexes in the portal.


5. Click  to save your work.

Creating Publishing Destinations for Elasticsearch

Elasticsearch is tied to your target—and therefore your output—through the use of publishing destinations. You must create both a primary destination and an Elasticsearch destination. With the primary destination, you tell Flare where to send your output files. With the Elasticsearch destination, you specify where your search indexing data should be stored (i.e., the server location that is set up by your network administrator).


HOW TO CREATE A PRIMARY DESTINATION

1. In the Project Organizer, right-click the **Destinations** folder and select **Add Destination**.
2. Give the file a name and click **Add**.
3. Complete the fields in the Destination Editor, depending on how you want to transfer a copy of your output files to their destination (e.g., FTP, SFTP). For details about the available options, see the online Help.
4. Click  to save your work.

 **NOTE:** You have the option in the Destination Editor to choose “File System” as the method for transferring files. In this case, you would be storing the copy of your output files to a local folder instead of transferring them remotely. You might choose to do this if you prefer to use a third-party tool to then move those files up to the server hosting your output.


If you choose to publish your files locally in this way, you must have Java Development Kit (JDK) version 8 installed: [Download for JDK 8](#).

HOW TO CREATE AN ELASTICSEARCH DESTINATION

1. In the Project Organizer, right-click the **Destinations** folder and select **Add Destination**.
2. Give the file a name and click **Add**.
3. In the Destination Editor, click the drop-down arrow for the **Type** field and select **Elasticsearch**.
4. Enter the **Search Destination URL**. This is the location provided by your network administrator where the search index files will be uploaded for your output.
5. Click  to save your work.

Associating Elasticsearch Destinations with a Target

1. From the Project Organizer, open the target that you want to associate with the destinations.
2. Click the **Publishing** tab.
3. Click the check box in the **Publish** column next to the primary destination file that you created.
4. Click the drop-down arrow in the **Elasticsearch Destination** column and choose the Elasticsearch destination file that you created.

 **NOTE:** Elasticsearch destinations will not display in the list of destinations on the Publishing tab in your Target Editor. This is because you will select one from the Elasticsearch Destination field on the Publishing tab of the Target Editor.

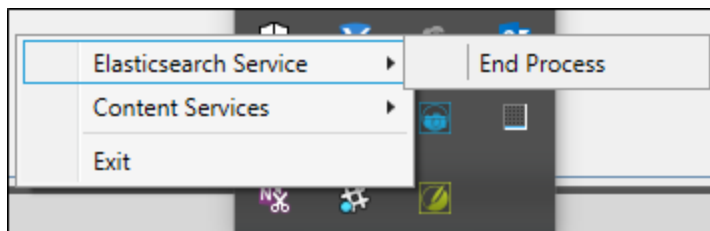
5. Click  to save your work.

MadCap Process Manager

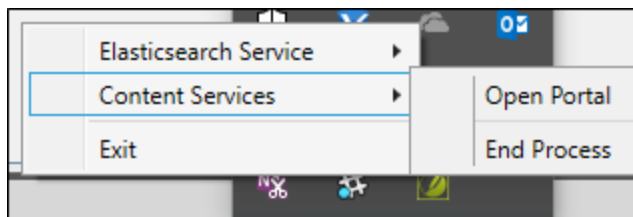
The Process Manager is a background process that manages the Elasticsearch service and the Flare web service. This process can be found in the system tray. It is initiated when the Content Services Portal is launched. See "Content Services Portal" on the next page.

The MadCap Process Manager continues to run even after Flare is closed. This process allows any Elasticsearch output to continue running.

If you need to troubleshoot your Elasticsearch output, you will need to stop the Elasticsearch process from running through the MadCap Process Manager. In order to do that, find the MadCap Process Manager icon in your system tray. Then, select **Elasticsearch Service > End Process**.



Once you are done using the Content Services Portal or any output configured with Elasticsearch, you can end the MadCap Process Manager by ending the task in Task Manager.



Content Services Portal

The Content Services Portal is used to manage your search indexes. You can review and manage your search indexes by topic, user searches, and global searches on each of your Elasticsearch targets.

How to Access the Content Services Portal

1. Open a project.
2. Open an HTML5 target that has been built using Elasticsearch as the search engine.
3. Click the **Search** tab in the Target Editor.
4. After all of the settings have been configured for Elasticsearch, click the **Launch Content Services** button.

Managing Search Indexes

You begin at the All Targets window in the portal. This window displays all HTML5 targets using Elasticsearch. You can access search data by an individual target.

The screenshot shows the 'All Targets' window in the MadCap Software interface. The window title is 'All Targets' and it includes a 'Targets Help' link in the top right corner. The main content area displays a table with the following columns: Project, Target, Date Created, and Date Modified. A single row is visible with the following data: Project: empty1, Target: elastic3, Date Created: 4/3/2018 3:12:27 PM, Date Modified: 4/3/2018 3:12:28 PM. A trash can icon is located to the left of the 'empty1' project name. Below the table, there is a 'Delete All' button and an information icon. Three callout boxes provide instructions: one pointing to the trash can icon, one pointing to the 'elastic3' target name, and one pointing to the 'Delete All' button.

Project	Target	Date Created	Date Modified
empty1	elastic3	4/3/2018 3:12:27 PM	4/3/2018 3:12:28 PM

Click this icon to delete the individual target. Note that if you delete your target, it deletes all of the search history for that target.

Click anywhere within the row of the specific target to access specific search history for that target.

Delete All ⓘ

This button will delete all of your Elasticsearch targets. If you wish to have new Elasticsearch targets after deleting all of your previous targets, you will need to republish them in Flare.

Selecting an individual target displays the Summary window for it. This window shows the total number of searches done on the target, number of files that can be searched in the target, and users that have searched on the target. The bottom half of this window displays the settings you configured in your Elasticsearch target.

This path displays the name of your project, followed by the specific target, then the page name (Summary) you are currently viewing.

The icon on the left allows you to delete this specific target, topics, and search indexes from the Content Services Portal. The icon on the right gives a warning that this entire target will be deleted from the portal.

Summary

Topics	User Searches	Global Searches
11	7	7

You can click on the individual box graphics for Topics, User Searches, and Global Searches to drill down into and obtain more granular information for the specific index.

Info

Target GUID: bbf5077-ef7e-4967-9e00-bf3061e15c73

Date Created: 4/13/2018 1:48:56 PM

Date Modified: 4/13/2018 1:50:28 PM

This bottom section displays all of your configuration settings for this specific target that you set up in the Target Editor in Flare.

Settings

Search Results

Fragment per result: 1

Fragment character limit: 300

Include stop-words in search: Disabled

Partial word search: Disabled

Advanced

Include importance: Enabled

Include fuzzy matches: Auto-Fuzziness

Auto-complete Results

Number of results: 6

Include project content: True

Include search history: True

Global threshold: 10

Please note that if you do not enable the Auto-complete Results setting in the Target Editor in Flare, this section will not display for this target on the Summary page in the portal.

If you click the red Topics button in the top left corner, the Topics window displays the total number of files searched on this target. You can enter a string in the search field to filter the list of files displayed in this window.

139683v2 / HTML5 - Audience B / Summary / Topics

Search

Topics

This box lists the number of topics for your targets. In this case, there are 22 topics in this target.

Use this search bar to find specific topics and narrow down the list that is displayed below. After you enter the search string, click the **Enter** button or click the magnifying glass button to search. You can also use this search bar on the User Searches and Global Searches windows.

Topics	User Searches	Global Searches
22	7	7

Title: Welcome to FictionSoft's Online Help

Path: Home.htm

Date Created: 4/13/2018 9:54:16 PM

Content:

Whenever the searched topic is modified and republished, the Date Created field is updated to reflect that the topic has been re-indexed for this target.

Each of the topics displayed below include the topic title, the path where the topic file resides in your project, the date the topic was created in the index, and an abstract of the content in your searched topic.

Welcome to FictionSoft's Online Help The Place to Find Information, Tutorials, FAQs, and More Meet FictionSoft FictionSoft gives you the following:
State-of-the-art interface Quality widgets Fun for the whole family Flexible, easy to use, and quite pretty Full support for this, that, and the other thing No batteries required Where Do I Begin? Basic Steps PDF Guides View More PDFs Videos

Title: Read First

Path: Read First.pdf

Date Created: 4/13/2018 9:54:12 PM

Content:

About This Template | Top Navigation Advanced 1 About This Template Before using this project template, we recommend you become familiar with

Clicking the blue button displays the number of user searches for the specific target. This window displays the search criteria from each individual search, along with the IP address of the user that conducted the search. You have the option to delete individual search criteria, or delete all of the individual user searches for your target.

The screenshot shows a dashboard titled 'User Searches' with three summary cards: 'Topics' (22), 'User Searches' (7), and 'Global Searches' (7). Below the cards is a table of search results. Callouts provide instructions on how to use the interface, such as deleting individual searches or all searches for a target, and navigating through multiple pages of results.

	Search Input	IP Address
	one	172.16.2.114
	two	172.16.2.114
	three	172.16.2.114
	test	172.16.2.114
	five	172.16.2.114
	susan	172.16.2.114
	simple	172.16.2.114

7 Results, 1 Pages

The Global Searches window is displayed when you click the green button on the Summary window. The Global Searches window shows each search criteria, along with the number of times that particular search string has been searched for your Elasticsearch target. The number displayed in the Search Count field increments higher when a specific string is searched by different IP addresses. So if the same IP address has searched a certain search string multiple times, the Search Count number does not increment higher for that particular IP address.

The screenshot shows the madcap software interface for Global Searches. At the top, there is a navigation bar with the madcap logo, a 'Targets' link, and a 'Help' link. Below the navigation bar, the breadcrumb path is '139683v2 / HTML5 - Audience B / Summary / Global Searches'. A search bar is located in the top right corner. The main content area features three large colored boxes: a red box for 'Topics' with the value 22, a blue box for 'User Searches' with the value 7, and a green box for 'Global Searches' with the value 7. Below these boxes is a table with the following data:

Search Input	Search Count
test	1
three	1
one	1
two	1
five	1
susan	1
simple	1

At the bottom of the interface, there are navigation controls: '< First 1 Last >'. The number '1' is highlighted in a blue box, indicating the current page.

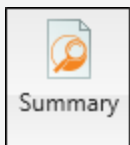
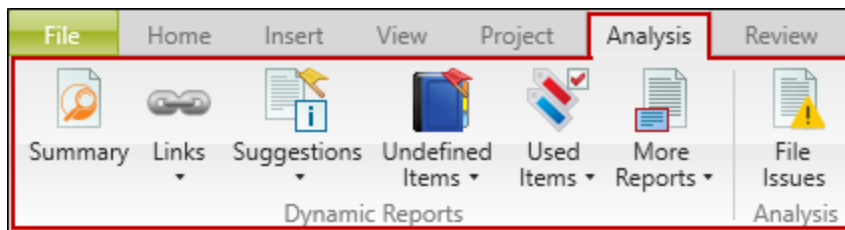
Callouts in the image provide additional context:

- A callout pointing to the 'Targets' link says: "Click the Targets link to return to the All Targets window displayed when you first entered the portal."
- A callout pointing to the 'Global Searches' box says: "As this box indicates there are seven overall searches on this target so far."
- A callout pointing to the 'Search Count' column header says: "The difference between User Searches and Global Searches data is that the Global Searches aggregates the number of times a search string has been entered on the target."

CHAPTER 5

Expanded Project Analysis

Previously, there were a few project analysis options available from a drop-down in the View ribbon. In this version, most of the features from the MadCap Analyzer program have been integrated into Flare. This dramatically increases the number of analysis features available in Flare. As a result, there is a new Analysis ribbon where you can access these features.



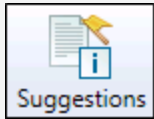
Opens the Analysis window pane, which is the primary window pane used for analysis in your project. This window pane displays a list of current issues in the project being analyzed.



Opens a submenu, which lets you select window panes that show information about links in your project.

- **Broken Links** Opens the Broken Links window pane, which lets you view a list of files in your project where a broken link is located. You can see which file it is trying to find, the link text, the link tag, and other information. You can also open the file where the broken link is located. The broken link is highlighted so that you can easily fix it.
- **Broken Bookmarks** Opens the Broken Bookmarks window pane. You can view a list of files with broken bookmarks. You can see the bookmark destination that the link is trying to find, the link text, the link tag, and other information. You can also open the file where the broken link is located so that you can fix it.
- **External Links** Opens the External Links window pane, which lets you view a list of files in your Flare project containing links to external files. For example, if you have a text hyperlink to a website, the file name where the link exists is displayed. By clicking the "Check" button, you can verify that all external links point to valid destinations. You can either double-click on the specific row, or right-click on the row and select **Open**. This allows you to fix any problems with external links.
- **Absolute Links** Opens the Absolute Links window pane, which lets you view a list of files in your Flare project containing absolute links to other files. An absolute link contains the full path to the target file. For example, let's say you have a text hyperlink that points to a file in your project like this: `file://C:\MyProject\Content\MyFile.htm`. (You can view this link format in the file's true code, which can be seen by using the Internal Text Editor in the source Flare project.) Because users do not have access to your local C: drive, they will not be able to use the link successfully in the output. Instead, the link should be relative to the file in your project, with dots and slashes that represent each folder level away from the current file (e.g., `..\..\MyFile.htm`). You do not need to create this path manually; instead, it is automatically created when you properly insert a link by using the interface. The Absolute Links window pane allows you to find absolute links so that you turn them into relative links (by re-inserting the link). You can either double-click on the specific row, or right-click on the row and select **Open**. The link is highlighted so that you can easily fix it.

- **Named Destinations** Opens the Named Destinations window pane, which displays files in your project containing named destinations for PDF output.
- **Index Keyword Links** Opens the Index Keyword Links window pane, which lets you view a list of all index keywords used in index links throughout your project. You can also quickly rename index keywords associated with the links.
- **Concept Links** Opens the Concept Links window pane, which lets you view a list of all concepts that have been used in concept links throughout your project. You can also quickly rename concepts associated with the links.



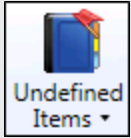
Opens a submenu, which lets you open window panes that display suggestions for improving your project.

- **Index Keyword Suggestions** Opens the Index Keyword suggestions pane, which lets you view a list of topics containing text that matches existing index keywords in your project. You can then quickly add the same index keywords to those topics.
- **Snippet Suggestions** Opens the Snippet Suggestions window pane, which lets you view content that matches existing snippets in your project, and you can quickly convert these occurrences to snippets. You can also double-click a row to open the topic in question, with the potential snippet content highlighted.
- **Variable Suggestions** Opens the Variable Suggestions window pane, which lets you view regular text that matches existing variables in your project, and then quickly convert these occurrences to variables. You can also double-click a row to open the topic in question, with the potential variable text highlighted.
- **New Style Suggestions** Opens the New Style Suggestions window pane, which lets you view the places in your project where you have used local formatting. The analysis tool suggests that you convert these instances of formatting to new styles. You can use the Create New Style dialog to do just that. You can also double-click a row to open the file where the formatted content exists.
- **Replace Local Style Suggestions** Opens the Replace Local Style Suggestions window pane, which lets you view the places in your project where you have used local formatting. The analysis tool suggests that you replace these instances of formatting with existing styles in your stylesheet that match the formatting that you have applied manually. This is different from a new style suggestion in the following way: With a new style suggestion, the properties in the tag do not match an *existing* style exactly; therefore, the analysis suggests that you create a *new* style. On the other hand, if you make formatting changes that happen to result in an exact match to all of the properties in an *existing* style, the analysis suggests that you replace the formatting with that style (rather than creating a new style).

- **Accessibility Suggestions** Opens the Accessibility Suggestions window pane, where you can search for places in your project where you can make accessibility improvements for web-based and PDF outputs in Flare. That way, you can make sure your documentation can be accessed by people with disabilities (i.e., individuals who have visual, hearing, and mobility impairments). This includes the ability to identify tables that are missing certain elements and finding objects—such as images, equations, and QR codes—that are missing alternate text. You can click the "Search Properties" button to customize which types of issues to display in the window pane. You can double-click a row to open the topic or other file. You can also right-click on the row and select **Open**.
- **Markup Suggestions** Opens the Markup Suggestions window pane, where you can search for places in your project where the XHTML markup (code) can be improved (e.g., empty tags, CDATA tags, empty attributes, excessive spaces). You can click the "Apply" button to automatically apply the suggestions to the selected files. You can click the "Search Properties" button to customize which types of issues to display in the window pane. You can double-click a row to open the topic or other file in Flare. You can also right-click on the row and select **Open**.
- **Cross-Reference Suggestions** Opens the Cross-Reference Suggestions window pane, where you can search for hyperlinks in your project that can be converted to cross-references. You can double-click a row to open the file and proceed to convert the hyperlink into a cross-reference.
- **Writing Suggestions** Opens the Writing Suggestions window pane, which lets you view places in your project where you can make writing improvements based on industry-wide standards. For example, the analysis tool can locate files where an h1 or h2 heading has only one subheading (i.e., an h1 heading with only one h2 heading under it, or an h2 heading with only one h3 heading under it). It is recommended that you have more than one subheading under a parent heading. Therefore, occurrences such as these are raised as concerns. The analysis tool can also locate files where a heading level has been skipped (e.g., an h1 heading is followed by an h3 heading, rather than h2), as well as any files where consecutive headings exist (e.g., an h1 heading is followed by an h2 heading, with no other content between

them). You can use the Writing Suggestions Search Properties dialog to customize which types of suggestions to display in the window pane.

- **Frequent Segments** Opens the Frequent Segments window pane, which lets you view a list of segments that occur frequently in your project. You can see the text, the number of occurrences of each segment, and the number of words and characters in each segment. If you notice that certain segments are repeated numerous times throughout your project, you can easily convert them to snippets or variables.
- **Similar Segments** Opens the Similar Segments window pane, which lets you view a list of segments of text in your project that are similar, but not identical, to each other. You may want to modify similar segments so that they become identical to each other, or even convert them to snippets. You can also use the "Start Search" button to limit or expand the list of similar segments that are displayed.



Opens a submenu, which lets you open window panes showing information related to used elements in your project.

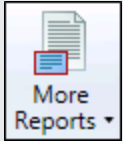
- **Undefined Glossary Term Links** Opens the Undefined Glossary Term Links window pane, which lets you view a list of files where glossary term links are inserted, but those glossary terms do not appear in any of your glossary files. This might occur, for example, if you have created a new term in a glossary and then inserted that term into a topic as a glossary term link. Later, you remove that term from the glossary. You now have a glossary term link in a topic, but the term no longer exists in the glossary. Therefore, a problem exists. You need to either remove the glossary term link from the content, or you need to add the term to the glossary again. From the Undefined Glossary Term Links window pane, you can quickly unbind or rename multiple glossary term link occurrences in a single batch, add a new glossary term, or map the undefined term to an existing glossary term.
- **Undefined Variables** Opens the Undefined Variables window pane, which lets you view a list of all files where you have variables inserted in the content, but those variables have not been defined. This might occur, for example, if you have inserted a variable in a topic and then later change the name of the variable or variable set. The old variable or set name is still used at the location where it was previously inserted in the topic; therefore, a problem exists. From the Undefined Variables window pane, you can open the topic in question and fix the undefined variable. You can also quickly rename or remove multiple variables in a single batch, add the undefined variable to the project, or map the undefined variable to an existing variable.
- **Undefined Condition Tags** Opens the Undefined Condition Tags window pane, which lets you view a list of all files where you have condition tags in the content, but those condition tags have not been defined. This might occur, for example, if you have applied a condition tag in a topic and then later change the name of the tag or condition tag set. The old tag or set name is still used at the location where it was previously applied in the topic. Therefore, a problem exists. From the Undefined Condition Tags window pane, you can open the file in question and fix the undefined condition tag. You can also quickly rename or remove multiple condition tag occurrences in a single batch, add the undefined tag to the project, or map the undefined tag to an existing condition tag.

- **Undefined File Tags** Opens the Undefined File Tags window pane, which lets you view a list of all files that are associated with file tags, but those file tags have not been defined. This might occur, for example, if you have associated a file tag with a topic and then later change the name of the tag or file tag set. The old tag or set name is still used for the topic. Therefore, a problem exists. From the Undefined File Tags window pane, you can open the file in question and fix the undefined tag. You can also quickly rename or remove multiple file tag occurrences in a single batch.
- **Undefined Styles** Opens the Undefined Styles window pane, which lets you view a list of all files where you have style classes applied to content, but those styles have not been defined. This might occur, for example, if you have created a new style class and applied it to a paragraph in a topic. Later, you remove that style class from the stylesheet. Therefore, you now have a style in a topic that is no longer defined in the stylesheet. You need to either apply a different, existing style class to that content, or you need to add the style class to the stylesheet again. You can also quickly rename or remove multiple style occurrences in a single batch, add the undefined style to the project, or map the undefined style to an existing style.



Opens a submenu, which lets you open window panes showing information related to used elements in your project.


- **Used Condition Tags** Opens the Used Condition Tags window pane, which lets you view a list of all condition tags that have been applied in files throughout your project. The list shows not only the condition tags, but each file where they have been used. You can also quickly rename or remove multiple condition tag occurrences in a single batch.
- **Used File Tags** Opens the Used File Tags window pane, which lets you view a list of all file tags used in your project. The list shows the tag type and the file that it is associated with. You can quickly rename or remove multiple file tag occurrences in a single batch.
- **Used Language Tags** Opens the Used Language Tags window pane, which lets you view a list showing each file where a language tag is found, the content tag to which it has been applied (e.g., html, span), and the language used.
- **Used Variables** Opens the Used Variables window pane, which lets you view a list of variables that have been inserted in your project. The list shows not only the variables, but each topic where they have been used. You can also quickly rename or remove multiple variable occurrences in a single batch.
- **Used Index Keywords** Opens the Used Index Keywords window pane, which lets you view a list of all index keywords used throughout your project. You can also quickly rename multiple keyword occurrences in a single batch.
- **Used Concepts** Opens the Used Concepts window pane, which lets you view a list of all concepts used in your project. You can also quickly rename multiple concept occurrences in a single batch.
- **Used Bookmarks** You can view a list showing each file where a link to a bookmark is found, including the name of the bookmark, the kind of link used, and the path of the link. You can also double-click a row to open the file where the bookmark link is inserted.



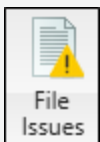
Opens a submenu, which lets you open additional window panes.

- **Files With Annotations** Opens the Files With Annotations window. You can view a list of all files where annotations (internal comments) have been inserted. You can also double-click a row to open the topic in question.
- **Files With Changes** Opens the Files with Changes window pane where you can view all topics in your project that contain tracked changes. You can either double-click on the specific row, or right-click on the row and select **Open**.
- **Topics Not In Index** Opens the Topics Not in Index window pane, which lets you view a list of all topics where you have not yet inserted index keywords. Therefore, no references to those topics will be found in the generated index. You can also double-click a row to open the topic in question.
- **Topics Not In Selected TOC** Opens the Topics Not in Selected TOC window pane, which lets you view a list of all topics that have been created in the project, but they have not yet been linked to any items in a TOC. A drop-down filter lets you select a specific TOC to analyze, or you can select "Any TOC" to analyze all TOCs in a project.
- **Topics Not Linked by Map ID** Opens the Topics Not Linked By Map ID window pane, which lets you view a list of all topics that are not linked to context-sensitive Help (CSH) map IDs. You can also double-click a row to open the topic in question.
- **Duplicate TOC Items** Opens the Duplicate TOC Items window pane, which lets you view a list of all files in your project that have been added more than once to a table of contents.
- **Duplicate Style Formats** Opens the Duplicate Styles window pane, which lets you view a list of all styles in your project where the same properties have been set. For example, let's say you have a style called "p.tip" and another style called "p.note." If you have specified the same settings for each of these styles (e.g., red font, 12 pt), with no other properties set, these styles will be included in the Duplicate Styles window pane. Groups or pairs of duplicate styles are displayed in alternating shaded rows (e.g., the rows for the first pair of duplicate styles are not shaded, the rows for the next group are shaded, the rows for the next group are not shaded, and so on). If you encounter

duplicate styles, you may want to modify the settings for one or both styles, or you can remove one of the style classes from the stylesheet.

 **NOTE:** Duplicate styles are displayed only if they are based on the same tag. For example, if you have identical properties set for the styles "p.tip" and "p.note," they will be included in the window pane (because they are both based on the p style). However, if you have identical properties set for the styles "p.tip" and "h4.note," they will not be included in the window pane (because one is based on the p style, whereas the other is based on the h4 style).

- **Unused Items** Opens the Unused Items window pane, which lets you view lists of unused elements in your project.
- **Non-XML Topics** Opens the Non-XML Topics window pane, which lets you view a list of non-XML files (e.g., HTML files) that have been added to your project. You can also convert those HTML files to XHTML files in a single batch.
- **Files With Snippet Conditions** Opens the Files with Snippet Conditions window pane. You can view a list of all files where snippet conditions have been applied. You can also double-click a row to open the file in question.
- **Files Without File Tags** Opens the Files Without File Tags window pane. You can view a list of all content files in the project that do not have file tags. Then you can open the properties for a file and associate one or more file tags with it.
- **Topics Without Concepts** Opens the Topics Without Concepts window pane. You can view a list of all topics in the project that do not have concepts inserted. You can then open a topic and insert concepts into it.



Opens the File Issues Viewer, where you can send selected files to the in order to see any issues associated with them. You can use the File List window pane to quickly add many files to this Viewer, or you can add files one at a time from within the user interface.

CHAPTER 6

Additional Features

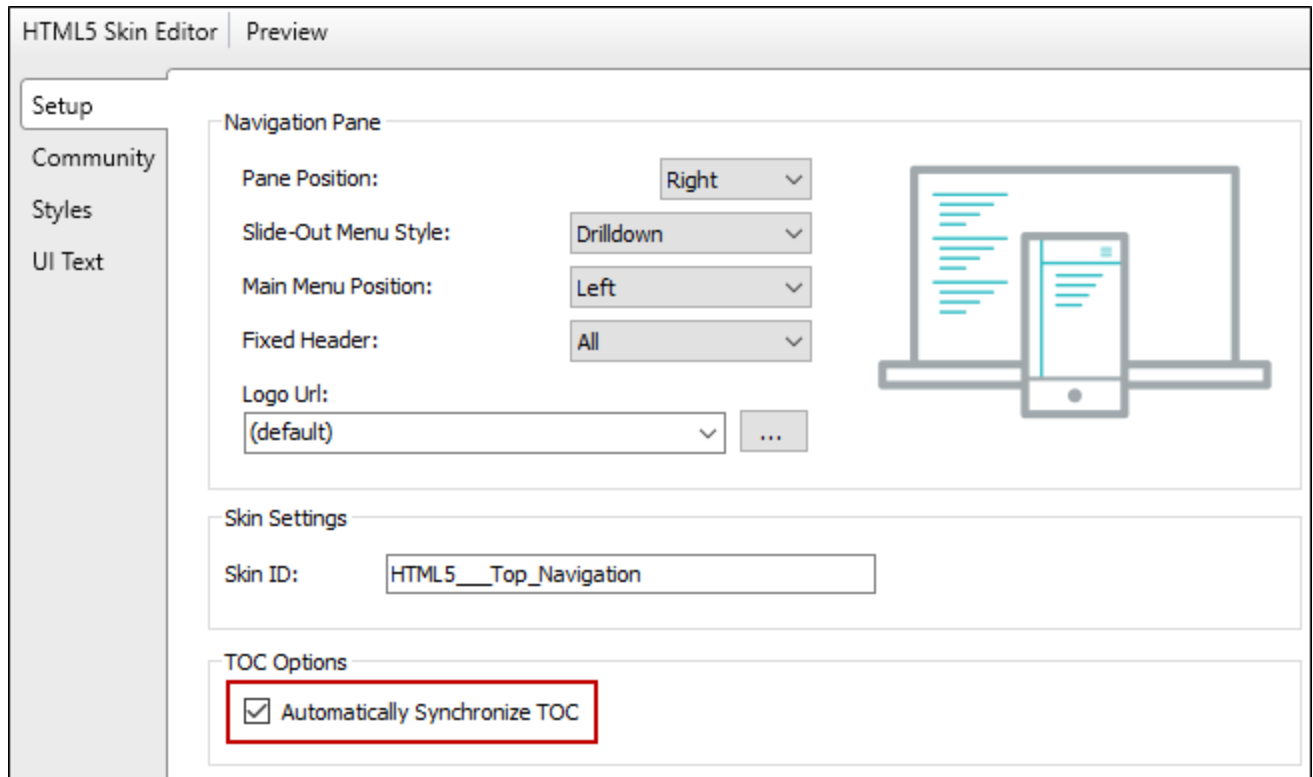
There are several additional new features added to this release.

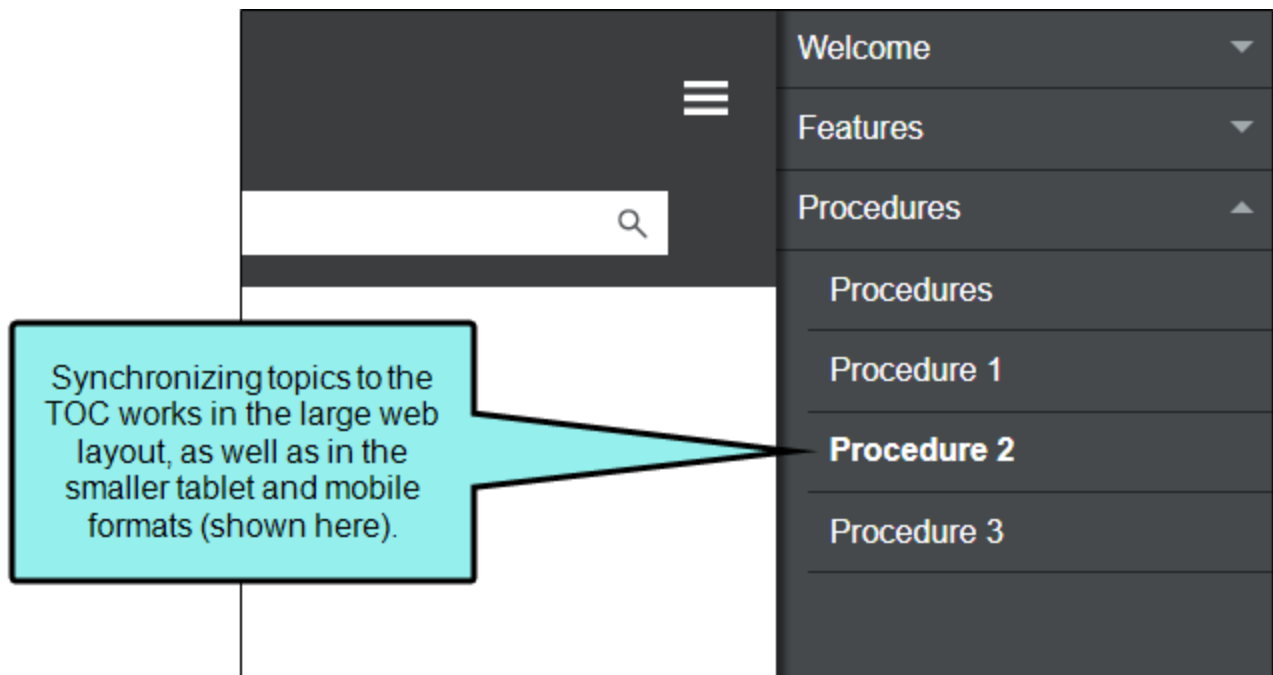
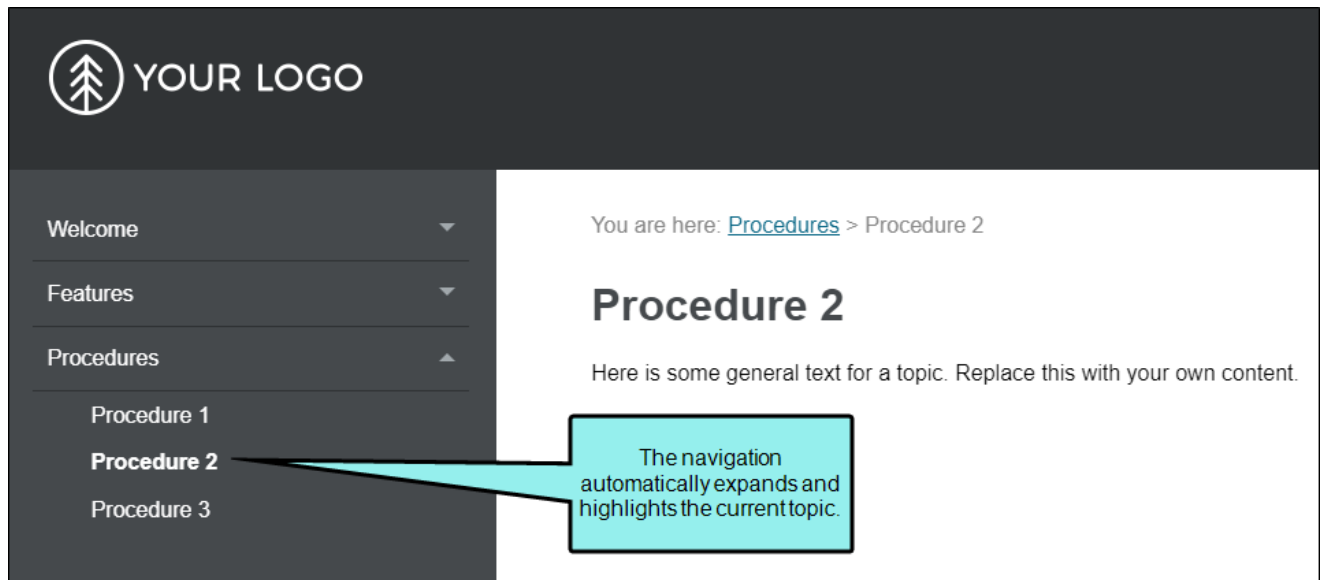
This chapter discusses the following:

Auto-Sync TOC	87
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Auto-Sync TOC

You can customize your output so that users can always see where the current topic belongs in the table of contents (TOC), even if they did not access the topic via the TOC. This can be done by selecting the "Automatically Synchronize TOC" option in the Skin Editor. When users navigate from topic to topic in the output, the TOC automatically changes accordingly, highlighting the topic that is open.



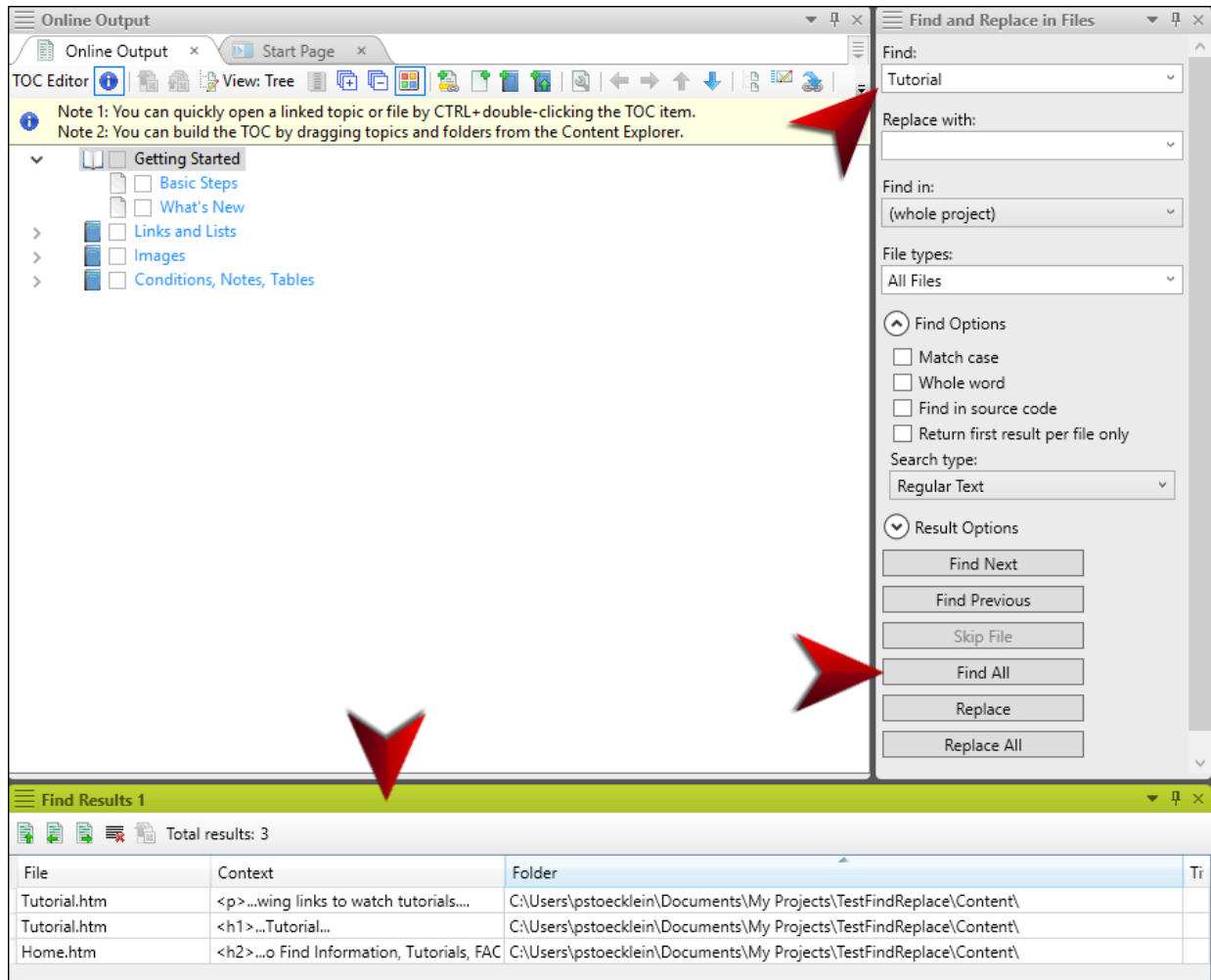


Although this option has previously been available in various output formats, including HTML5 Tri-pane, it was not supported in HTML5 Top Navigation targets. However, it is now available in both HTML5 Side and Top Navigation outputs.

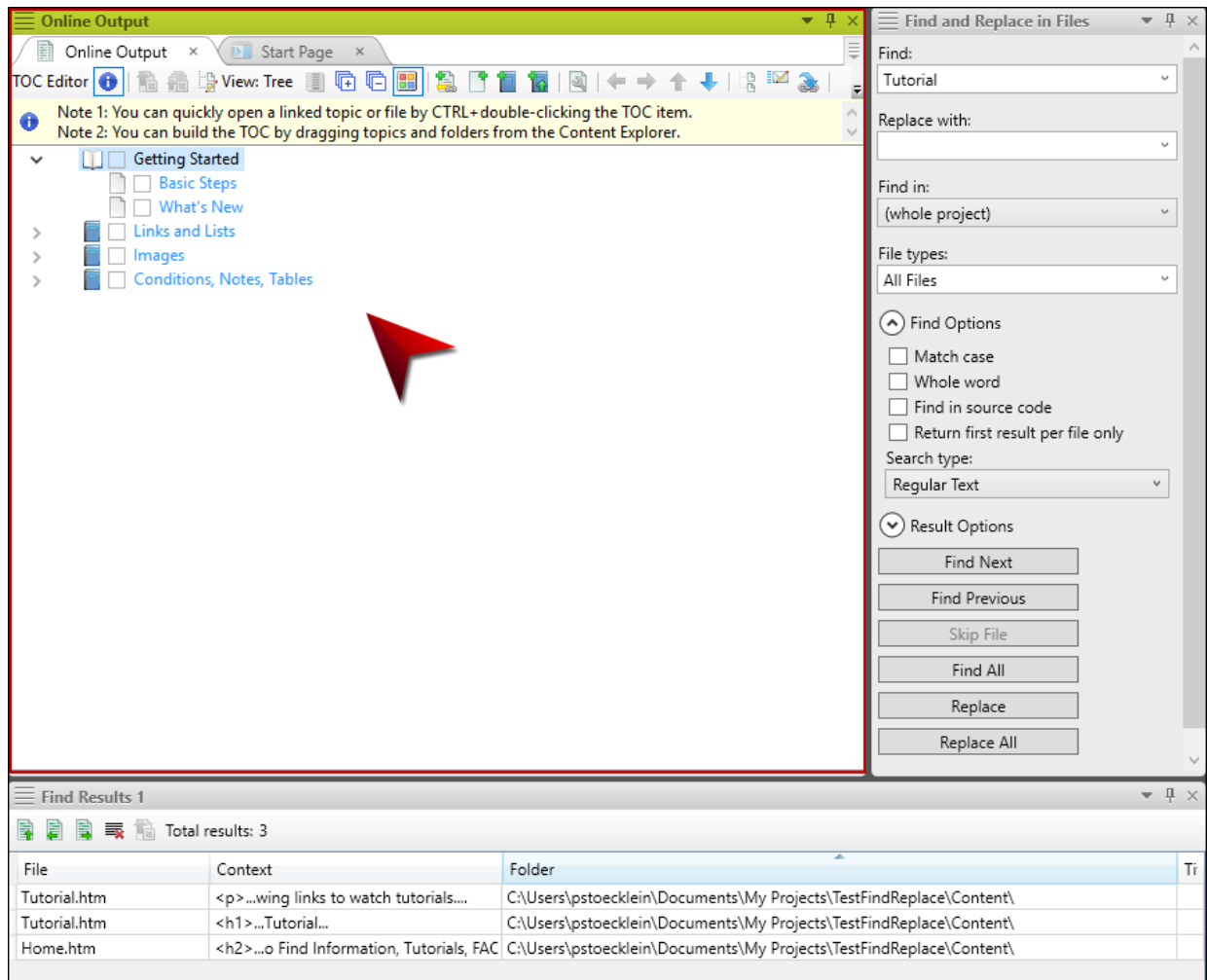
Find and Replace—Drag Topics to TOC/Browse Sequence

After using the “Find and Replace” feature, you can now add resulting topics to a table of contents (TOC) or browse sequence.

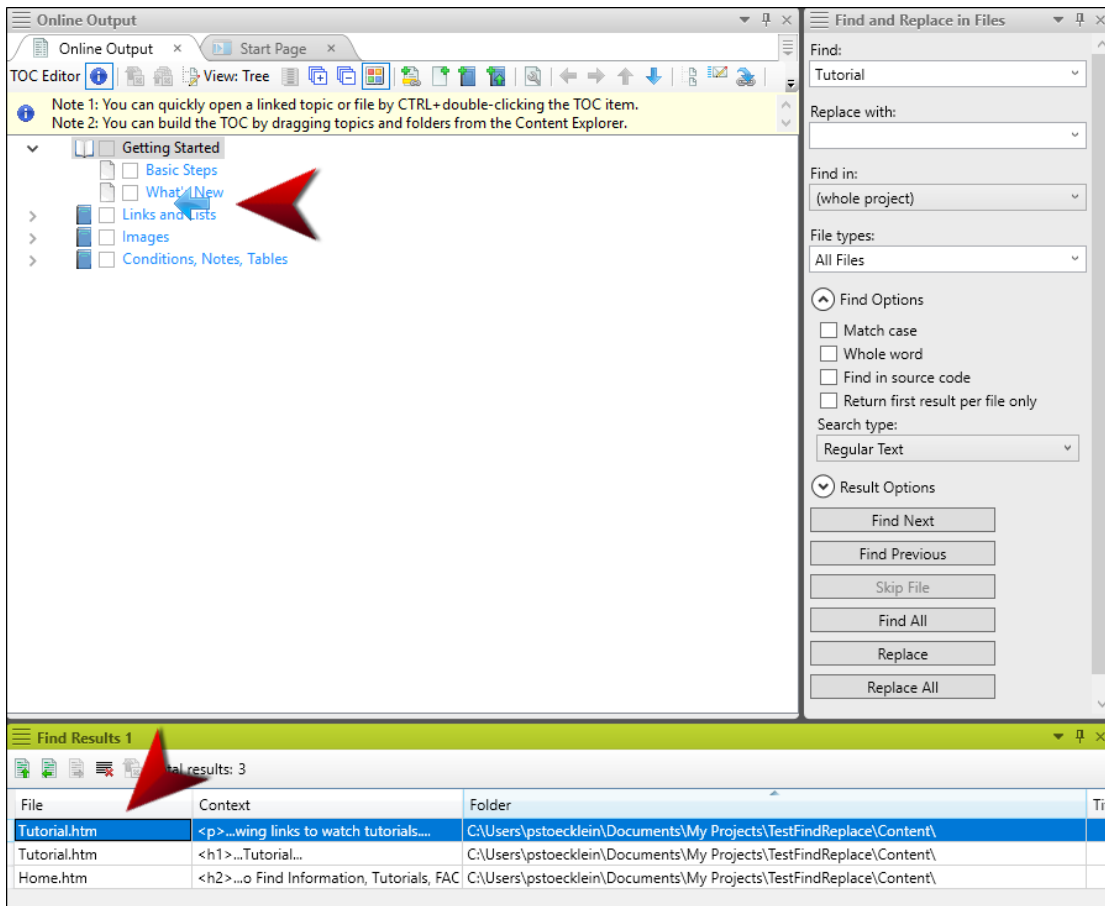
1. Open the Find and Replace in Files window pane, enter search criteria, and click **Find All**. The results are populated in the Find Results window pane at the bottom of the interface.



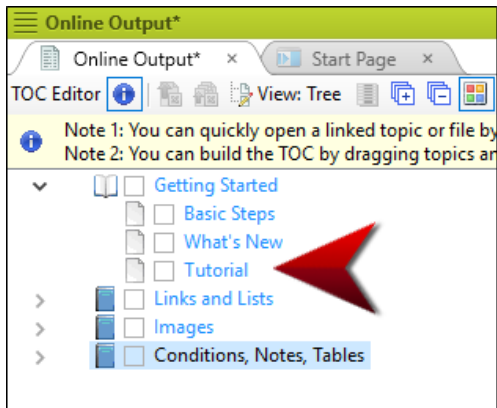
2. Open the TOC or browse sequence.



3. In the Find Results window pane, select the topic file(s) you want to add to the TOC or browse sequence. You can hold the **SHIFT** key to select a range, or you can hold the **CTRL** key to select individual items.
4. Drag the file(s) to the TOC or browse sequence and drop them at the location you want.

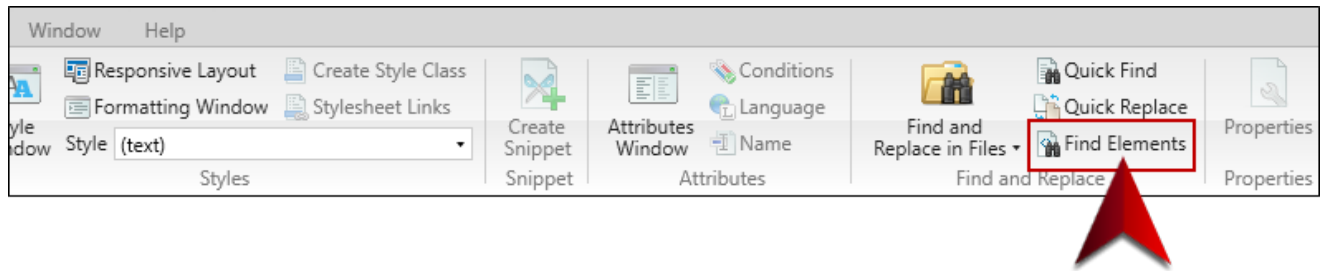


By default, the text will be blue to indicate that a variable based on the title of the topic is being used. However, you can override the variable by double-clicking the TOC or browse sequence node and replacing the label with your own text.



Find Elements

A Find Elements window pane has been added, which you can open from the **Home** ribbon.



This feature lets you find files containing particular elements—custom tags, MadCap-specific features (e.g., drop-down text, concepts, equations), markup, inline styles, and style classes. You have the flexibility to look in all files in the project or only in the open documents. The results of the search are displayed in either the Find Results 1 window pane or in the Find Results 2 window pane, depending on your selection.

HOW TO USE THE FIND ELEMENTS FEATURE

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

- **Ribbon** Select the **Home** ribbon. In the **Find and Replace** section, select **Find Elements**.
- **Keyboard Shortcut** Press **CTRL+N**.

The Find Elements window pane opens.

2. In the **Find what** field, select one of the available options from the drop-down.

- **Custom Tags** When you select this option you can click in the "Search for" field and enter text. This lets you search for any tags, whether they are standard HTML tags (such as `img` or `table`) or MadCap-specific tags (such as `MadCap|annotation` or `MadCap|concept`). If you leave the "Search for" field blank, Flare looks for all tags.
- **MadCap** When you select this option you can click in the "Search for" field and select from dozens of elements specific to MadCap Flare, such as drop-down text, Help control links, concepts, proxies, equations, QR codes, and much more.
- **Markup** When you select this option you can click in the "Search for" field and select from dozens of standard HTML tags, such as `a`, `div`, `h1`, `ol`, `span`, and much more.

- **Inline Styles** When you select this option you can click in the "Search for" field and enter text. This lets you search for elements with locally applied styles such as color or font. If you leave the "Search for" field blank, Flare looks for all elements with inline styles.
 - **Style Classes** When you select this option you can click in the "Search for" field and enter text. This lets you search through the class attribute for all elements. If you leave the "Search for" field blank, Flare looks for all elements that have a style class applied to them.
3. Click in the **Find in** field and select one of the following.
 - **Whole Project** Flare looks for the text in every document in the project.
 - **All Open Documents** Flare looks for the text in all documents currently open in the interface.
 4. Click in the **Search for** field and either make a selection from the drop-down or enter text in the field. The kind of action you can perform in this field depends on what you already selected in the "Find what" field above.
 5. Click one of the output radio buttons.
 - **Output in Find Results 1** Flare will display the search results (list of files) in the Find Results 1 window pane.
 - **Output in Find Results 2** Flare will display the search results (list of files) in the Find Results 2 window pane. This is useful if you have already performed a search using the Find Results 1 window pane and want to keep those results open while you do another search.
 6. Click the **Find All** button. The search results are displayed in the window pane that you specified.

☆ EXAMPLE

Let's say you have inserted search bar proxies in many content files throughout your project, and you want to edit some of these proxies. To discover which files contain search bar proxies, you open the Find Elements window pane and set the fields like this:

- **Find what** MadCap
- **Find in** (whole project)
- **Search for** Search Bar Proxies



Find Elements

Find

Find what:
MadCap

Find in:
(whole project)

Search for:
Search Bar Proxies

Find All

Options

Output in Find Results 1
 Output in Find Results 2

After clicking **Find All**, you see that there are 90 files in the project that contain a search bar proxy, and you can scroll through the list to open the relevant ones.

Find Results 1

Total results: 90

File	Context	Fc	Tr
Home-Align.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Orange.flask	C:\	
Home-Analyzer.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Orange.flask	C:\	
Home-Capture.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Blue.flaskn" x	C:\	
Home-Central.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Central-Blu	C:\	
Home-Contributor.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Green.flaskn"	C:\	
Home-D2H.htm	<MadCap:searchBarProxy data-mc-skin="/Project/Skins/Shared/Home-Search-Bar-Turquoise.fl	C:\	

Global Track Changes

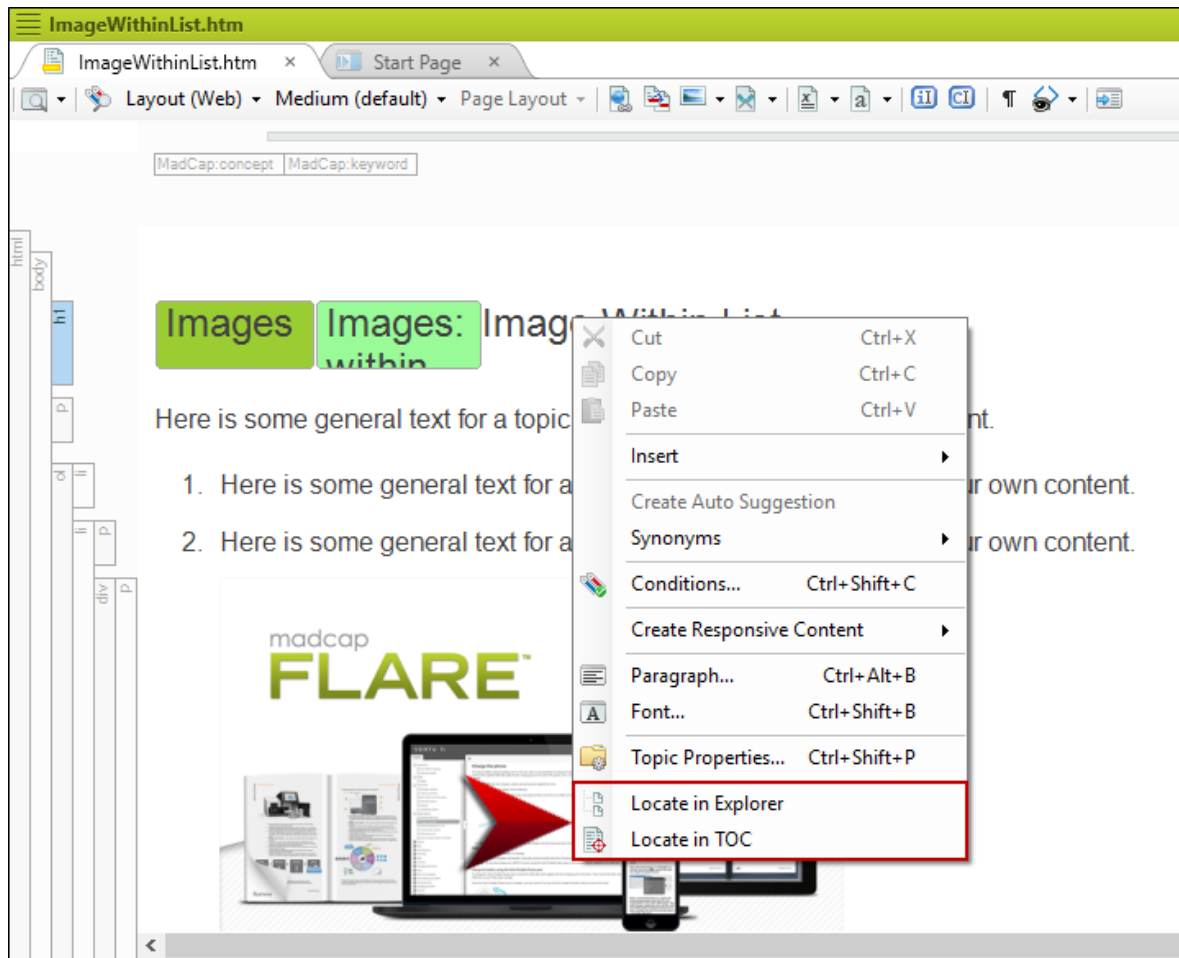
The Track Changes feature is now a global setting throughout the Flare project. This setting previously allowed you to view any edits that took place only in the active file. Thus, you would have had to click the Track Changes button in other open files to ensure this feature was enabled.

When you now click on the Track Changes button in the Review ribbon, this setting is enabled for all files in your Flare project. If you click on the Track Changes button again, this feature is now disabled globally throughout your Flare project.

Locate in TOC/Content Explorer

In previous versions, you could find a topic's location in a TOC by right-clicking in the Content Explorer or using a button in the Project ribbon. Likewise, you could find a content file's location in the Content Explorer by using a button in the Project ribbon.

These options are still available, but now you also have the option of right-clicking the file in the XML Editor and choosing **Locate in Explorer** or **Locate in TOC** in the context menu.



If you select **Locate in Explorer**, Flare opens the Content Explorer, expanding folders to show where the file is located.

If you select **Locate in TOC** and the topic is located in more than one TOC, a dialog opens, listing all of those TOCs. Select the TOC you want to look in and click **Open**. Flare opens the TOC, expanding books to show where the topic is located. If the topic has been inserted in multiple locations in the TOC, each occurrence is highlighted.

Microsoft TFS 2018 Support

If you are using Microsoft Team Foundation Server (TFS) for source control, be aware that Flare now supports TFS 2018.

Salesforce Enhancements

The following enhancements have been made to Salesforce integration with Flare. For additional information within the Salesforce portal, see <https://developer.salesforce.com/>.

Salesforce Lightning

You can now use Salesforce Lightning navigation. When you create a new publishing destination in Flare, you will notice the following new options for Salesforce:

- **Record Type** When Lightning knowledge is enabled, all article types must be consolidated into a single one. You can then create record types to separate and classify types of knowledge articles.
- **Create lightning style links** This allows all links to open in Lightning mode. For example, clicking a hyperlink while viewing a topic in Classic mode will open the linked topic in Lightning mode.

Destination Editor

General

Type: Salesforce Connect ▼ Activate

Salesforce Connect trial period expires in 30 days

Credentials

Login Credentials... Login to Sandbox

Please set credentials

Salesforce Connect

Article Type:

Please select an Article type

Record Type:

Channels:

Internal App:App

Categories:

Exclusions:

Default.htm,Default_CSH.htm,Search.htm

Article Summary: ⓘ

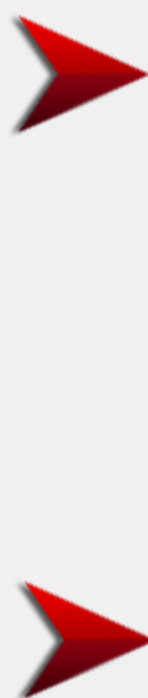
Publish Options:

Include images

Publish articles

Create lightning style links

Use compression and bulk upload



Multilingual Support

You can now publish articles in different languages to Salesforce. The list of available languages depends on the organization, but below you can see all the languages that Salesforce currently supports and their Flare equivalents.

If you publish a project in an unsupported language, the articles will default to the organization's default language.

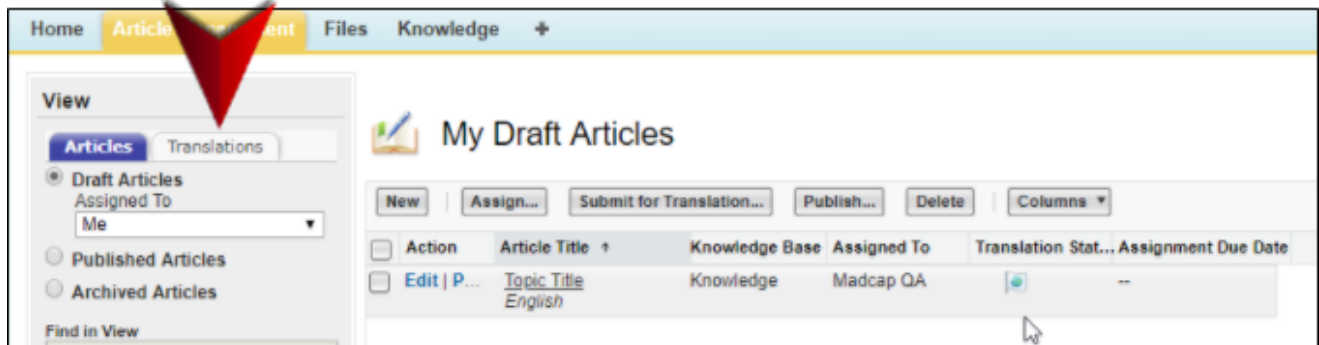
LANGUAGE EQUIVALENCY

Salesforce Language	Flare Language
Chinese (Simplified)	Chinese (China)
Chinese (Traditional)	Chinese (Taiwan)
Danish	Danish i.e., Danish (Denmark) is incorrect
English	English (United States) i.e, English or any other similar is incorrect
Finnish	Finnish
French	French i.e., French (Canada) or any other similar is incorrect
German	German i.e., German (Germany) or any other similar is incorrect
Italian	Italian i.e., Italian (Italy) or any other similar is incorrect
Japanese	Japanese i.e., Japanese (Japan) is incorrect
Korean	Korean i.e., Korean (Korea) is incorrect

Salesforce Language	Flare Language
Portuguese (Brazil)	Portuguese (Brazil) i.e., Portuguese or any other similar is incorrect
Russian	Russian i.e., Russian (Russia) or any other similar is incorrect
Spanish	Spanish i.e., Spanish (Spain) or any other similar is incorrect
Spanish (Mexico)	Spanish (Mexico) i.e., Spanish (Spain) or any other similar is incorrect
Swedish	Swedish i.e., Swedish (Sweden) or any other similar is incorrect
Thai	Thai

MULTILINGUAL OUTPUT

You can also publish multilingual projects to Salesforce. Rather than putting all articles in the Drafts section, translated content will go into a Translations tab.



On the Translations tab, you will see your posted content. You can toggle between Draft Translations and Published Translations.



MULTILINGUAL PROJECT LIMITATIONS

Following are a couple of limitations of multilingual projects:

- Flare cannot publish directly to Salesforce when you have a multilingual project. Any items in the Translations tab cannot be published. Your Flare project will be published in the articles section.
- Flare cannot add a new linked project the first time after your publish from Flare. In that case, you must delete all articles and the log file.

SharePoint 2016 and 365 Support

Starting with this version, SharePoint 2016 and 365 are supported.

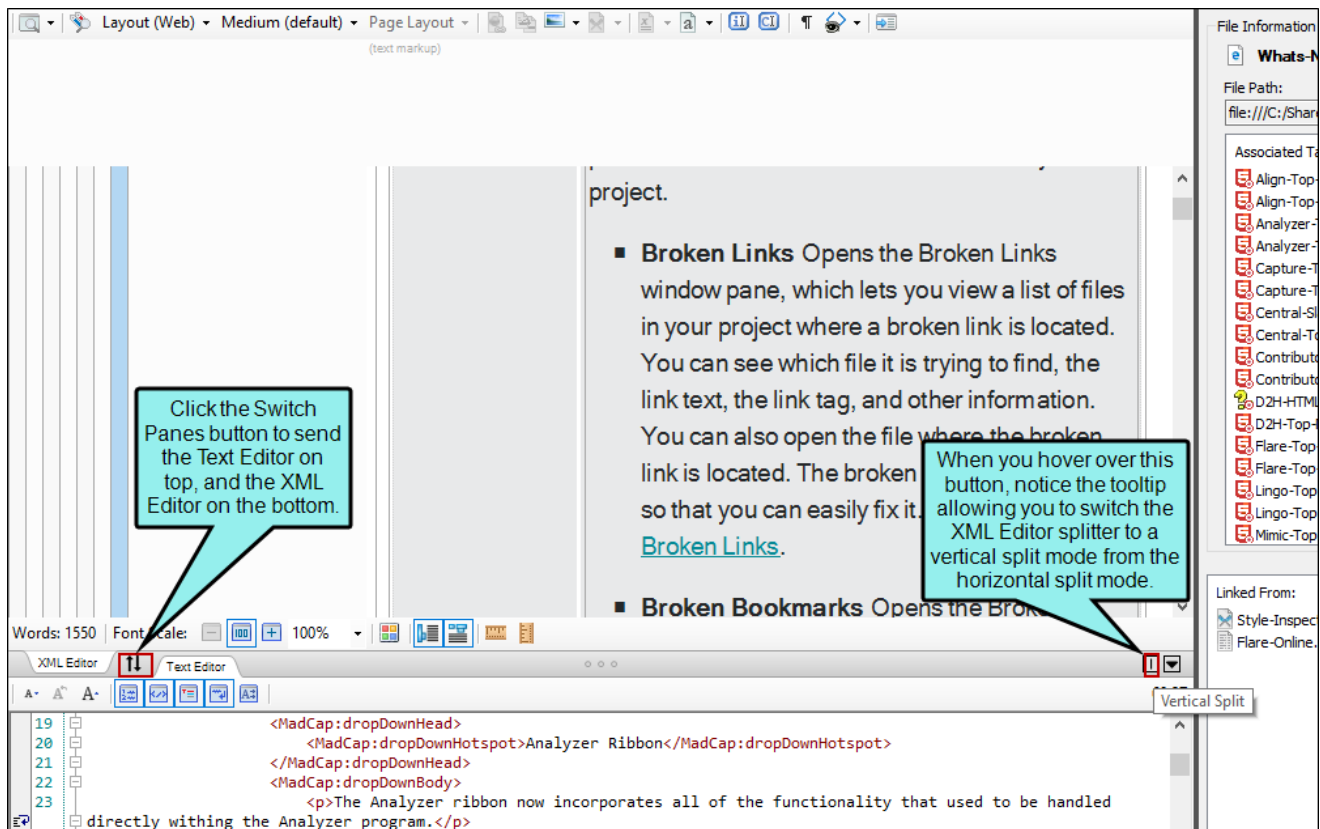
User Interface Improvements

Additional enhancements have been made to the look and feel of Flare. If you use high DPI for your monitor, these enhancements should fix issues where certain icons were not visible on your monitor.

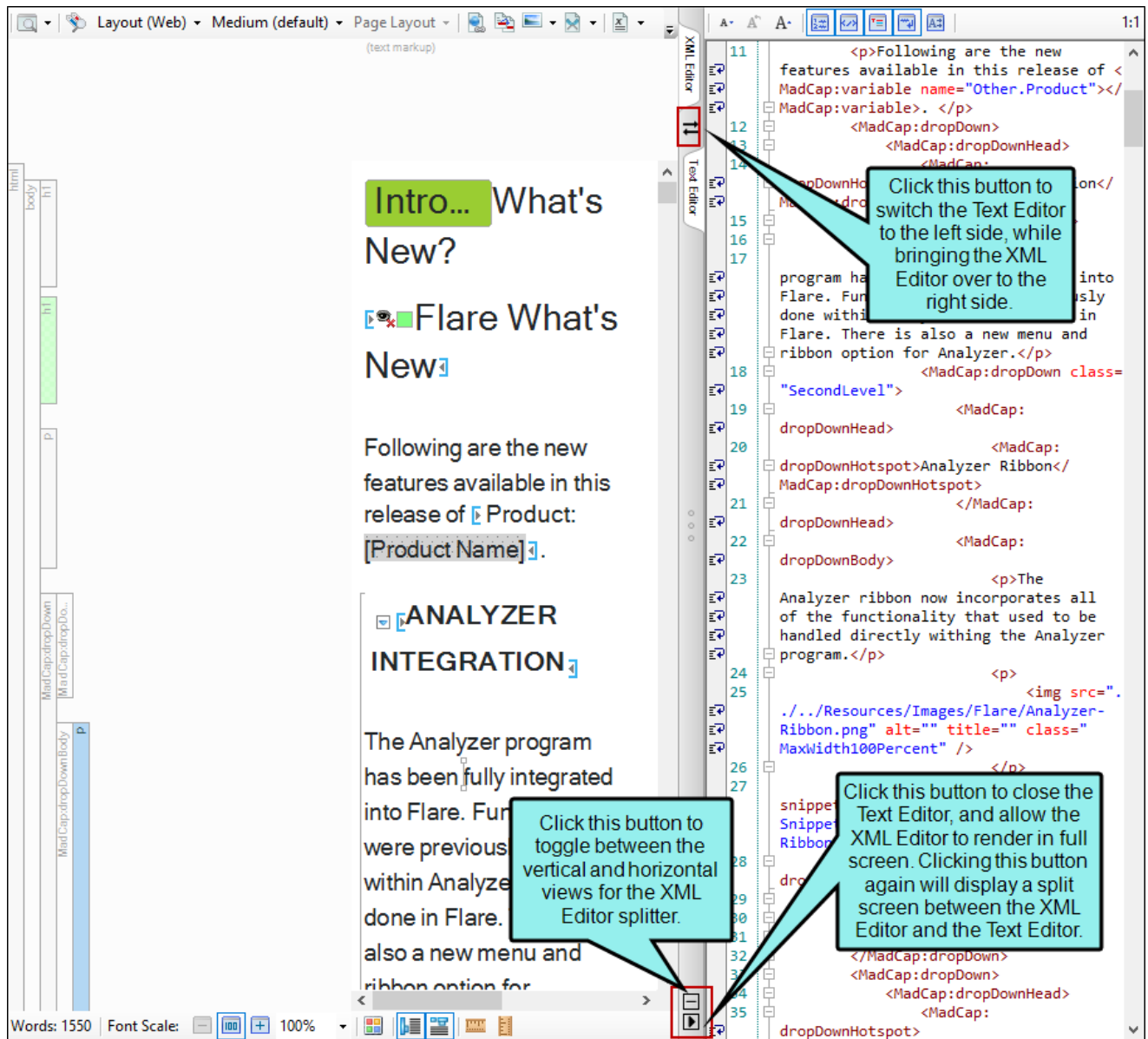
XML Editor Splitter

The Split View offered in the XML Editor has been updated with buttons to allow you to easily switch between full and split views of the XML Editor. Tooltips are offered when you hover over these buttons.

This is how the XML Editor splitter is rendered in horizontal view.

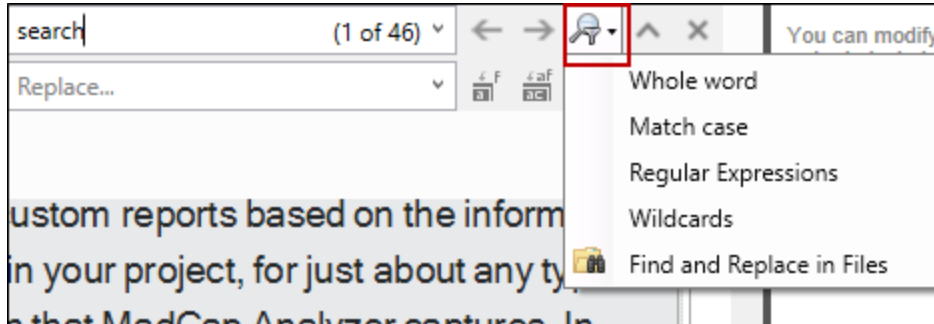


This is how the XML Editor splitter displays in vertical mode now.



Quick Find and Replace Widget Drop-Down

The Find and Replace widget has also been updated to offer a drop-down arrow next to the Filter button. Clicking this drop-down arrow gives you specific filtering options. This widget displays within a file.



APPENDIX

PDFs

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

TUTORIALS

Getting Started Tutorial

Product Foldout Tutorial

Side Navigation Tutorial

Top Navigation Tutorial

Tripane and PDF Tutorial

USER GUIDES

Accessibility Guide

Analysis and Reports Guide

Autonumbers Guide

Condition Tags Guide

Context-sensitive Help Guide

DotNet Help Guide

Eclipse Help Guide

Getting Started Guide

Global Project Linking Guide

HTML Help Guide

HTML5 Guide

Images Guide

Importing Guide

Index Guide

Key Features Guide

Language Support Guide

MadCap Central Integration Guide

Movies Guide

Navigation Links Guide

Print-based Output Guide

Project Creation Guide

Pulse Guide

QR Codes Guide

Reports Guide

Reviews & Contributions Guide

Search Guide

SharePoint Guide

Skins Guide

Snippets Guide

Source Control Guide: Git

Source Control Guide: Perforce

Source Control Guide: Subversion

Source Control Guide: Team Foundation Server

Source Control Guide: Visual SourceSafe

Styles Guide

Tables Guide

Tables of Contents Guide

Targets Guide

Templates Guide

Topics Guide

Touring the Workspace Guide

Transition From FrameMaker Guide

Variables Guide

WebHelp Outputs Guide

What's New Guide

CHEAT SHEETS

Folders and Files Cheat Sheet

Print Output Cheat Sheet

Shortcuts Cheat Sheet

Structure Bars Cheat Sheet

Styles Cheat Sheet