madcap software

USER GUIDE

MADCAP CENTRAL

Getting Started Guide

MadCap Software
9191 Towne Center Drive, Suite 150
San Diego, California 92122
858-320-0387
www.madcapsoftware.com

THIS PDF WAS CREATED USING MADCAP FLARE.

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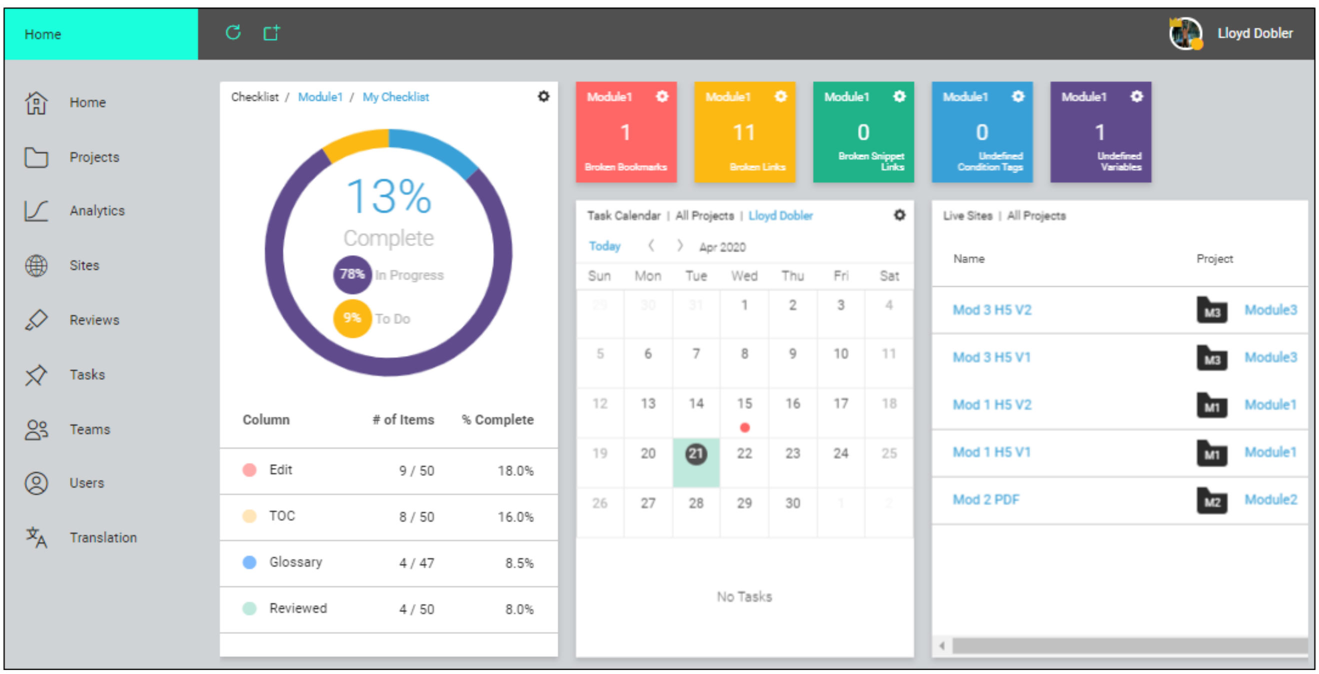
CHAPTER 1

Introduction

MadCap Central is a cloud-based platform that lets you plan, track, and manage the processes, content, and teams that are at the heart of your organization. It is especially ideal for MadCap Flare users, but even non-Flare users can take advantage of MadCap Central.



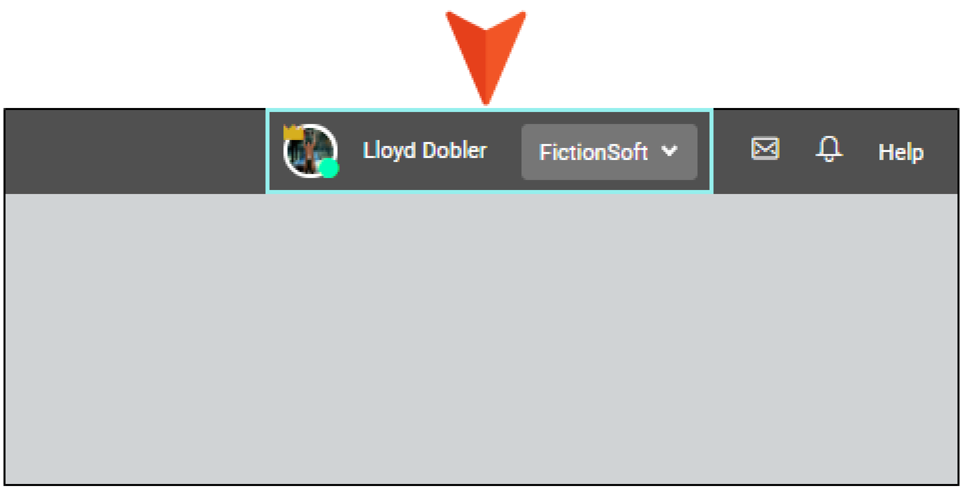
This guide discusses the following:

- Interface Take a quick look at the basic areas of the interface, especially the main navigation framework. See "Interface" on page 7.
- Users and Permissions Learn about inviting users to your license and setting permissions to control what each person is allowed to do. See "Users and Permissions" on page 15.
- Teams Discover how you can organize users on your license into teams. See "Teams" on page 24.
- Projects and Builds See how you can upload Flare projects, associate users with them, and manage builds (output). See "Projects and Builds" on page 27.
- Sites Learn about using sites to manage your output (live and/or private), as well as the domains (URLs) for accessing the output. See "Sites" on page 44.
- Analytics View user activity on published Flare HTML5 output. See "Analytics" on page 45.
- Reviews Take a look at how you can view, edit, and manage Flare review files. See "Reviews" on page 47.
- Tasks Understand how tasks can help you manage your workload and processes. See "Tasks" on page 49.
- Translation Request a quote to have your projects and files translated into other languages. See "Translation" on page 64.
- Widgets Learn how to insert information objects (widgets) into your Home and Project dashboards. See "Widgets" on page 66.

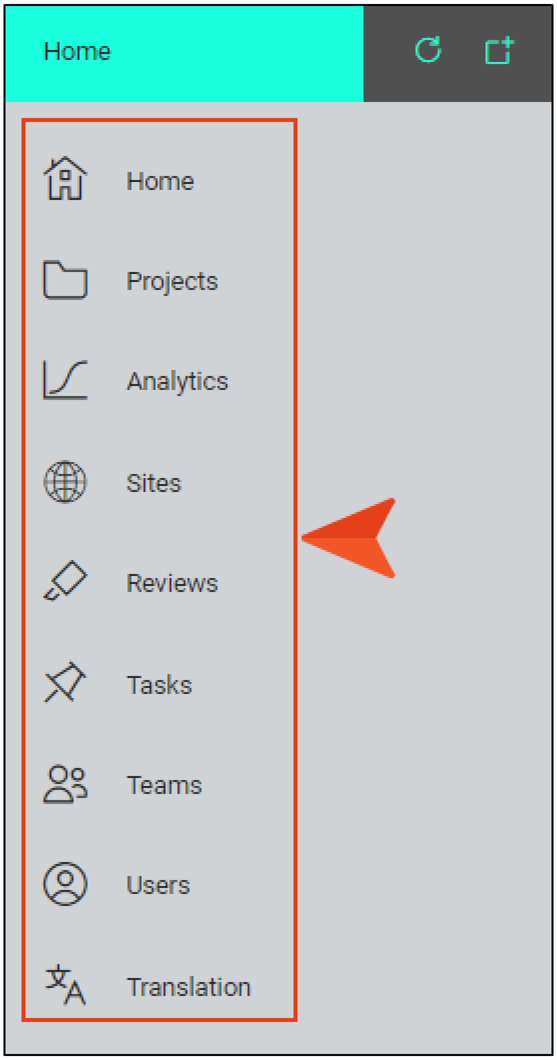
CHAPTER 2

Interface

After you first log in to Central, you will see your name at the top, next to the name of your license. If you are a user on more than one license, you can use the drop-down field to switch between licenses without signing out.



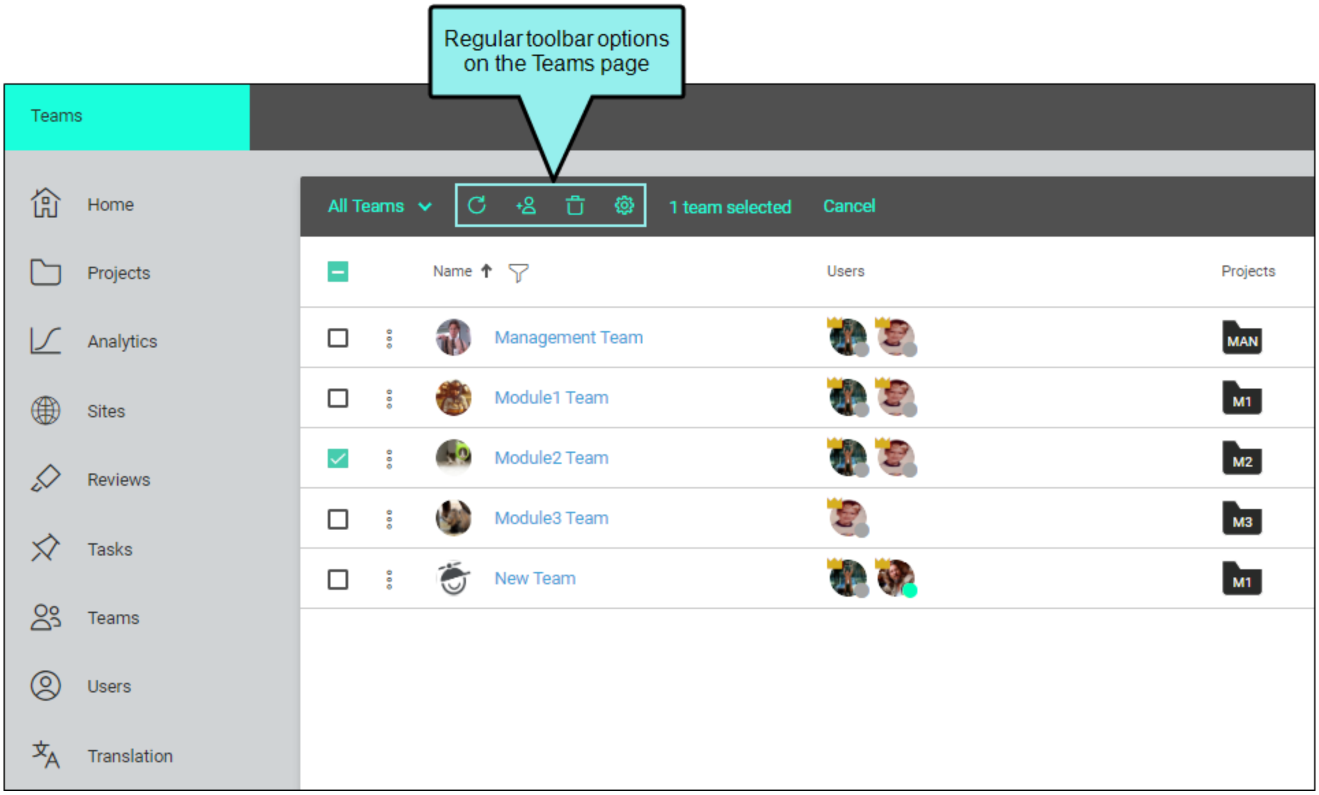
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Tasks, Reviews, Teams, Users, and Translation.

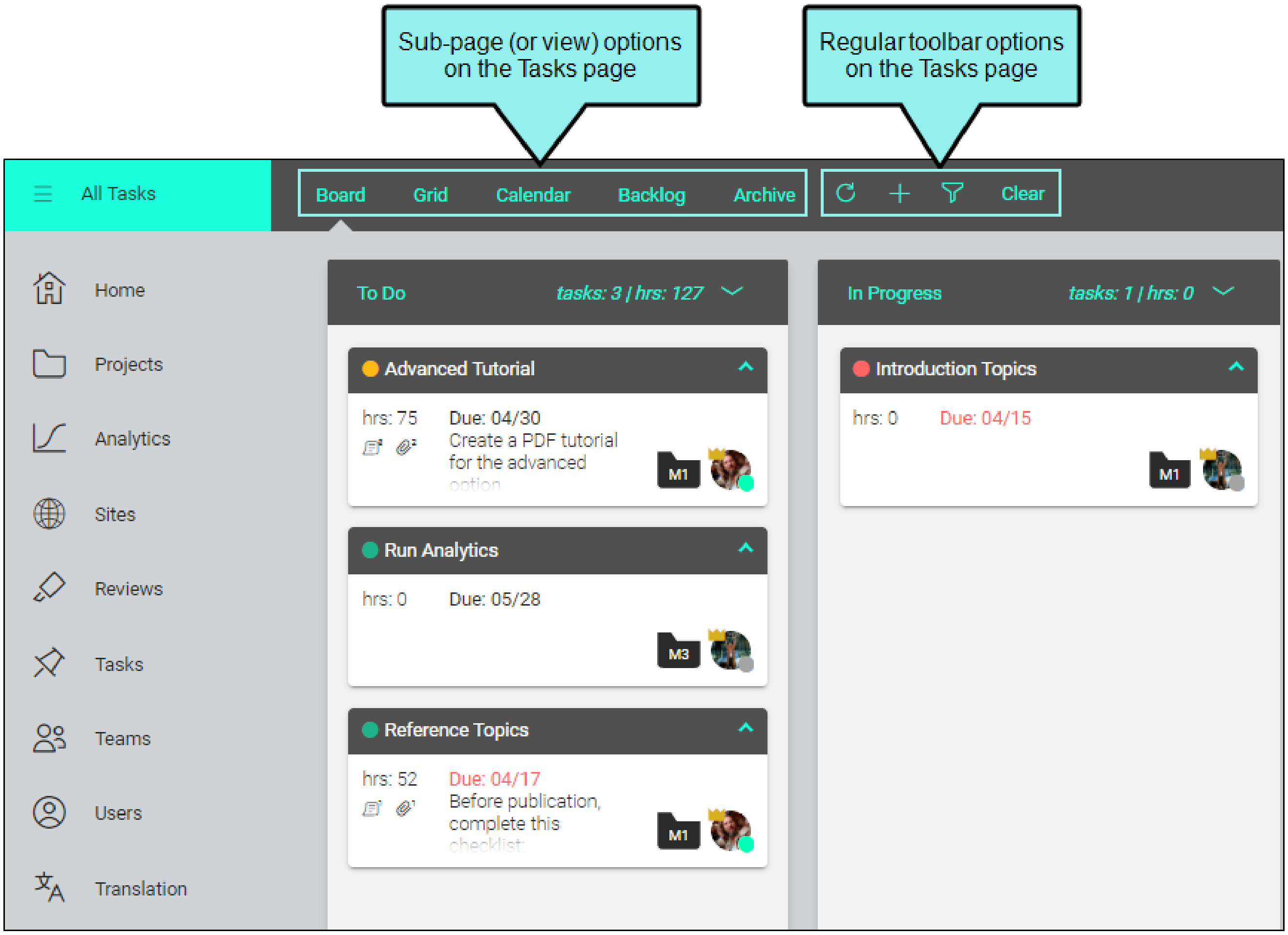


> **NOTE** If you are a Subject Matter Expert (SME), rather than a Flare author, you will only see the Reviews page.

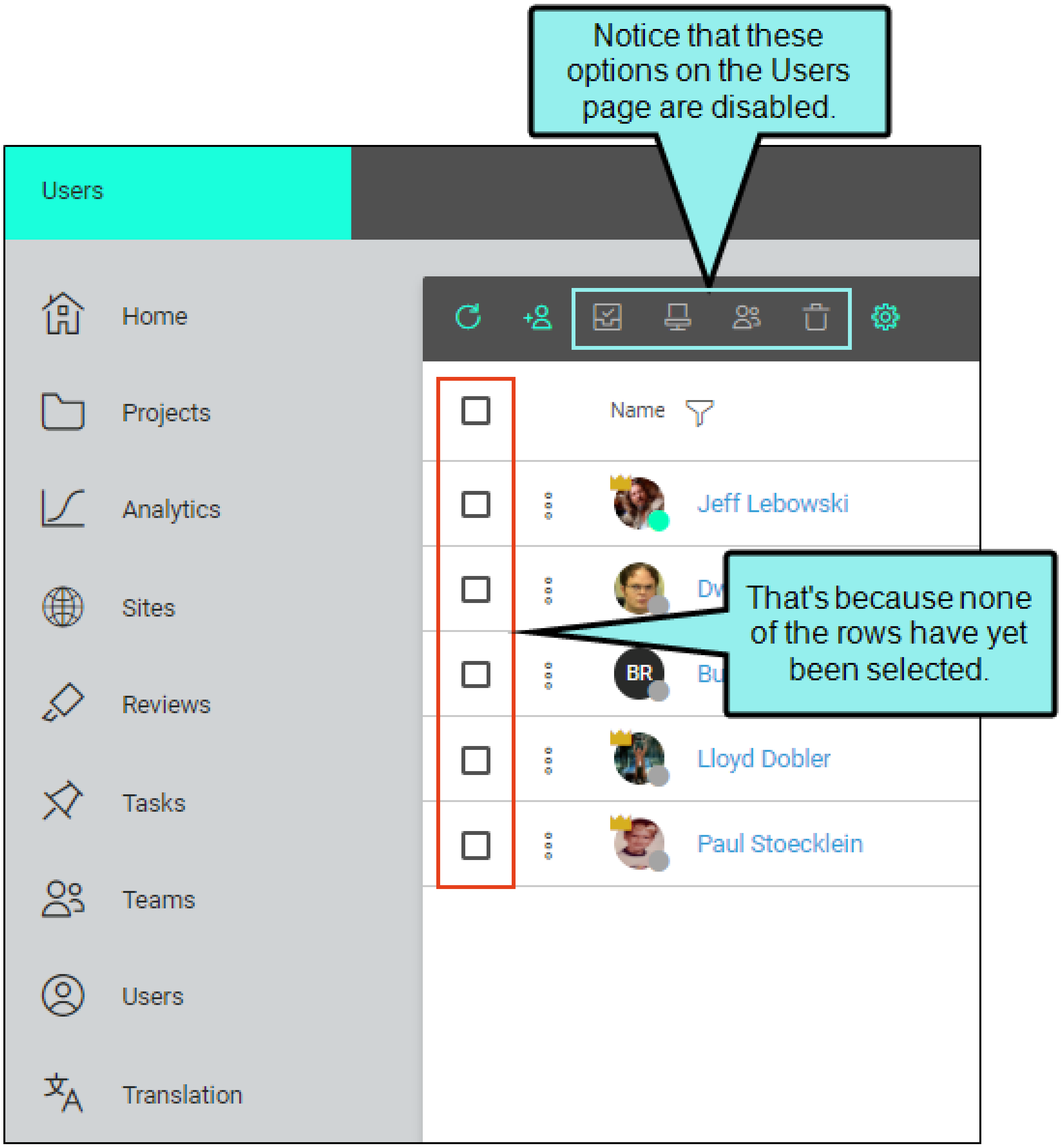
Your Home dashboard is initially empty, but you can add widgets to it by clicking  at the top. Widgets provide a quick glance of various types of information throughout your system. See "Widgets" on page 66.

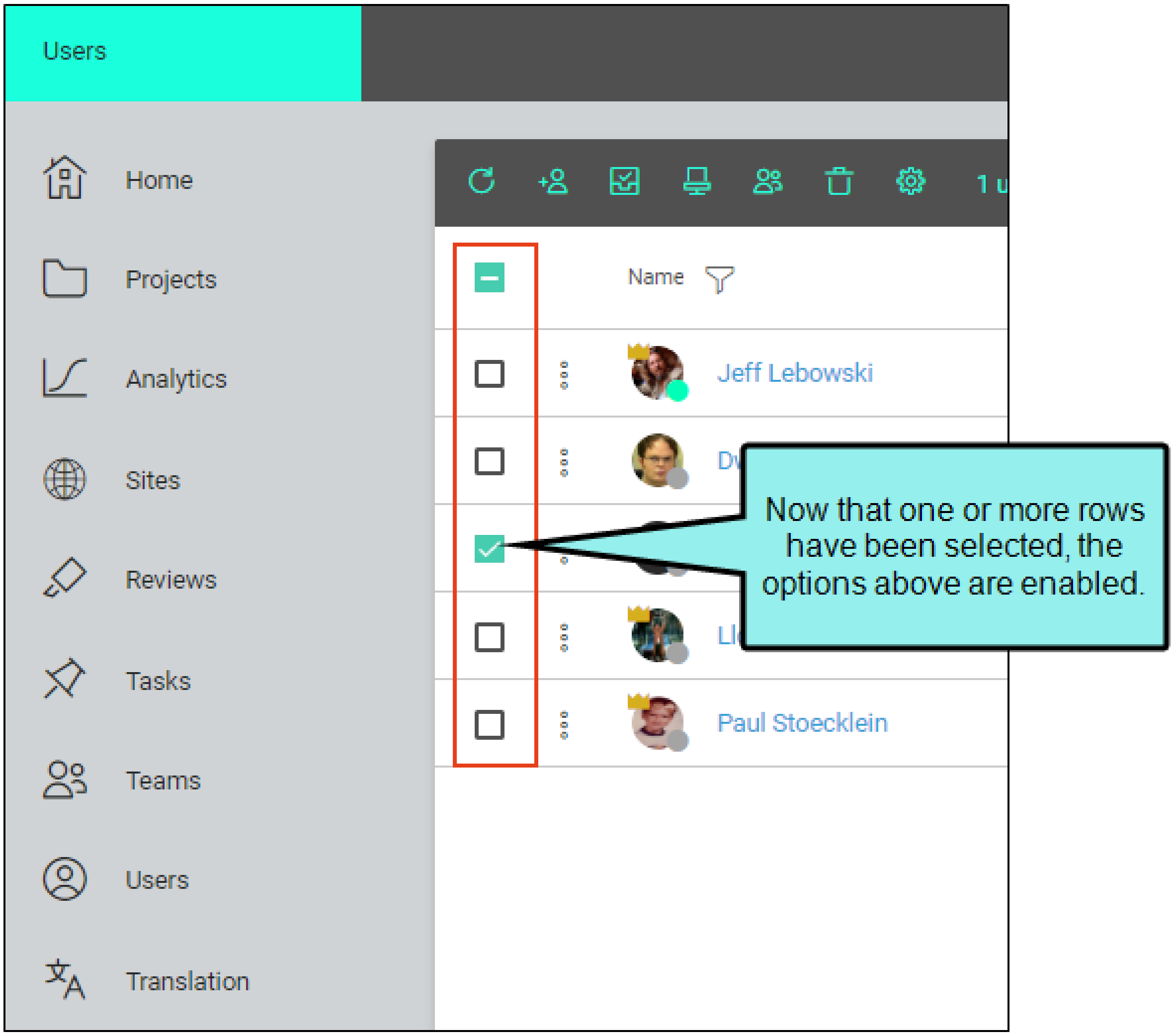
Each page in Central has a toolbar that lets you add, manage, and remove information on that page. Some pages—such as Projects and Tasks—have additional options at the very top of the interface, which let you see different sub-pages (or views).




Sub-page (or view) options on the Tasks page
Regular toolbar options on the Tasks page
All Tasks
Board
Grid
Calendar
Backlog
Archive
Clear
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Translation
To Do
tasks: 3 | hrs: 127
In Progress
tasks: 1 | hrs: 0
Advanced Tutorial
hrs: 75
Due: 04/30
Create a PDF tutorial for the advanced
M1
Run Analytics
hrs: 0
Due: 05/28
M3
Reference Topics
hrs: 52
Due: 04/17
Before publication, complete this
M1
Introduction Topics
hrs: 0
Due: 04/15
M1

Depending on the page, some toolbar options might not be accessible until you make selections by clicking the check boxes next to rows.

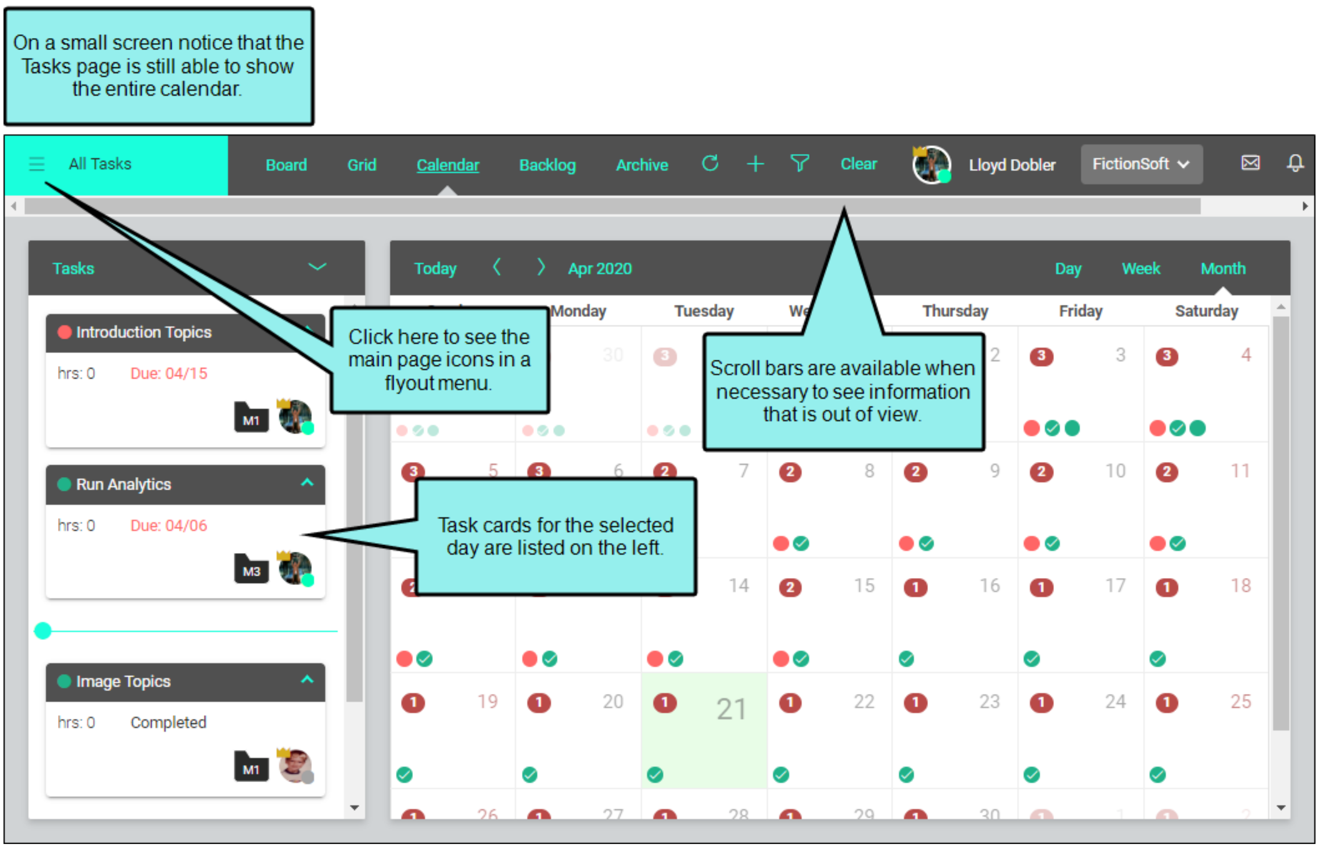


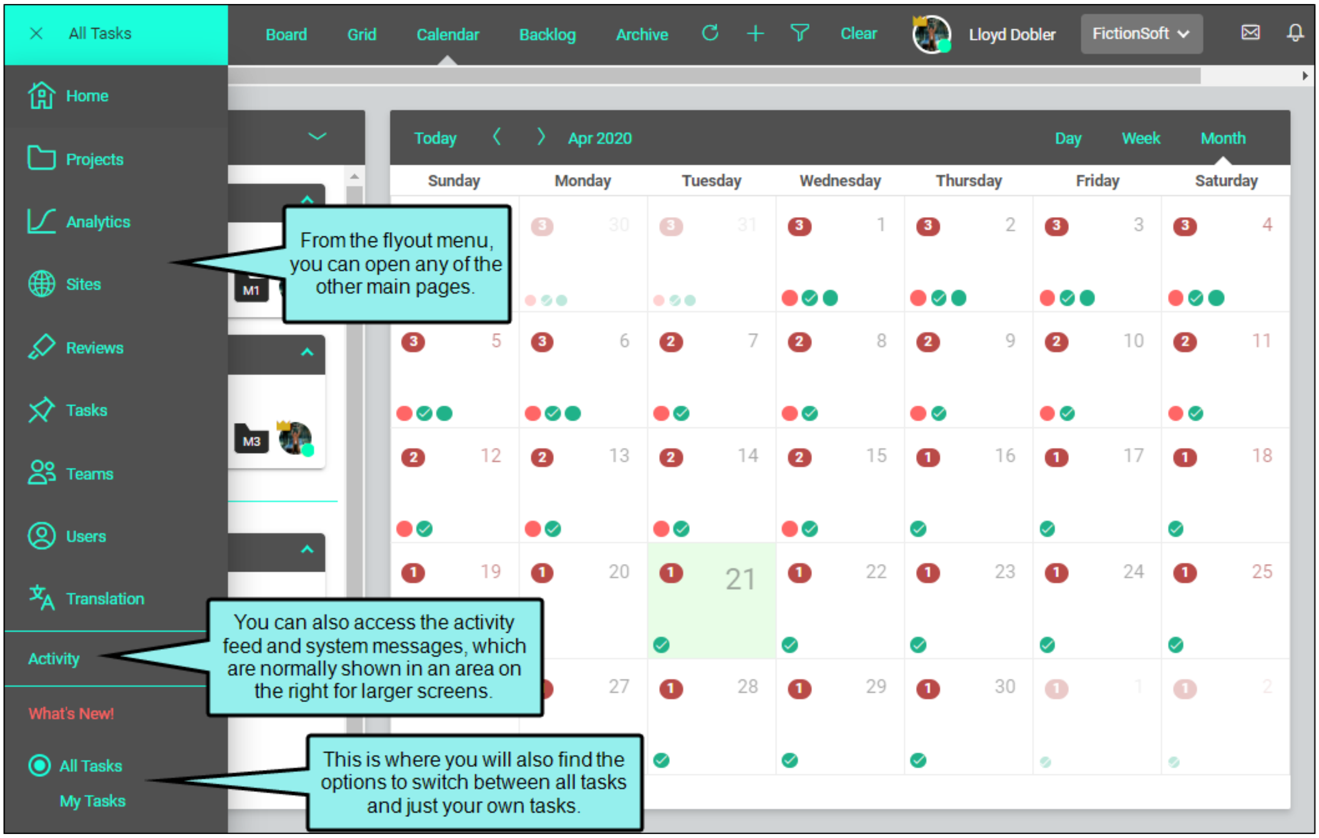

Users
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Translation
Name
Jeff Lebowski
Paul Stoecklein
Now that one or more rows have been selected, the options above are enabled.

Responsive Interface

The Central interface is responsive, which means that the elements of the workspace shift automatically when you move from a large screen to a smaller one, or from a high-resolution monitor to a low-resolution display.

If you are working on a small screen or at a low resolution, you will notice that the main navigation and some elements are moved into a flyout pane, which you can open by clicking ☰ in the upper-left corner. This leaves the primary areas of focus in view, but also makes other options easily accessible.



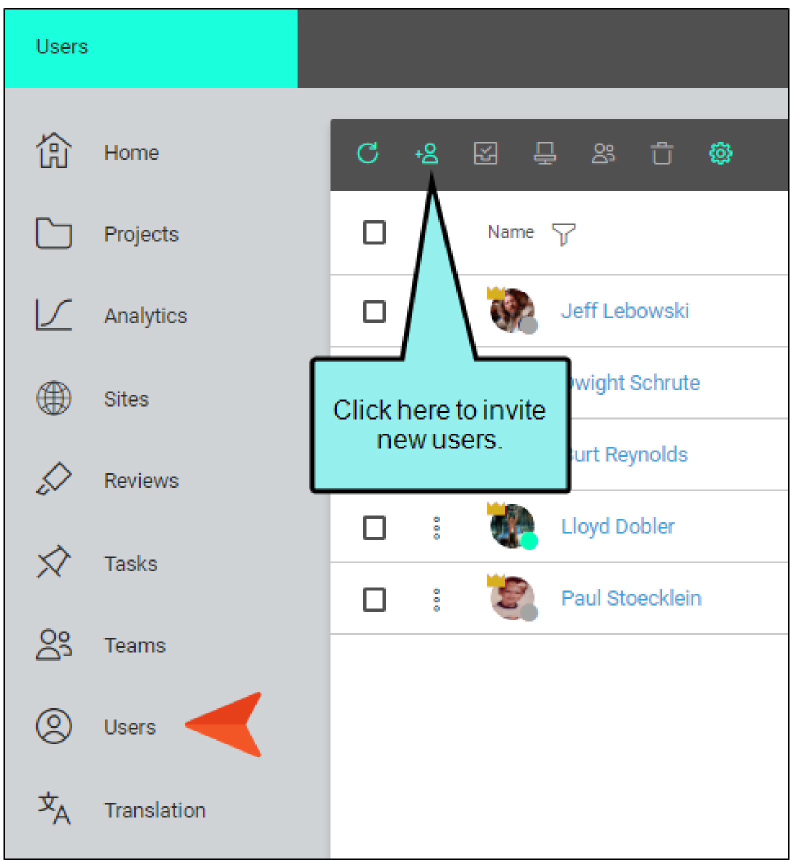


All Tasks
Board
Grid
Calendar
Backlog
Archive
Clear
Lloyd Dobler
FictionSoft
Home
Projects
Analytics
Sites
Reviews
Tasks
Teams
Users
Translation
Activity
What's New!
All Tasks
My Tasks
Today
Apr 2020
Day
Week
Month
Sunday
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
From the flyout menu, you can open any of the other main pages.
You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
This is where you will also find the options to switch between all tasks and just your own tasks.

CHAPTER 3

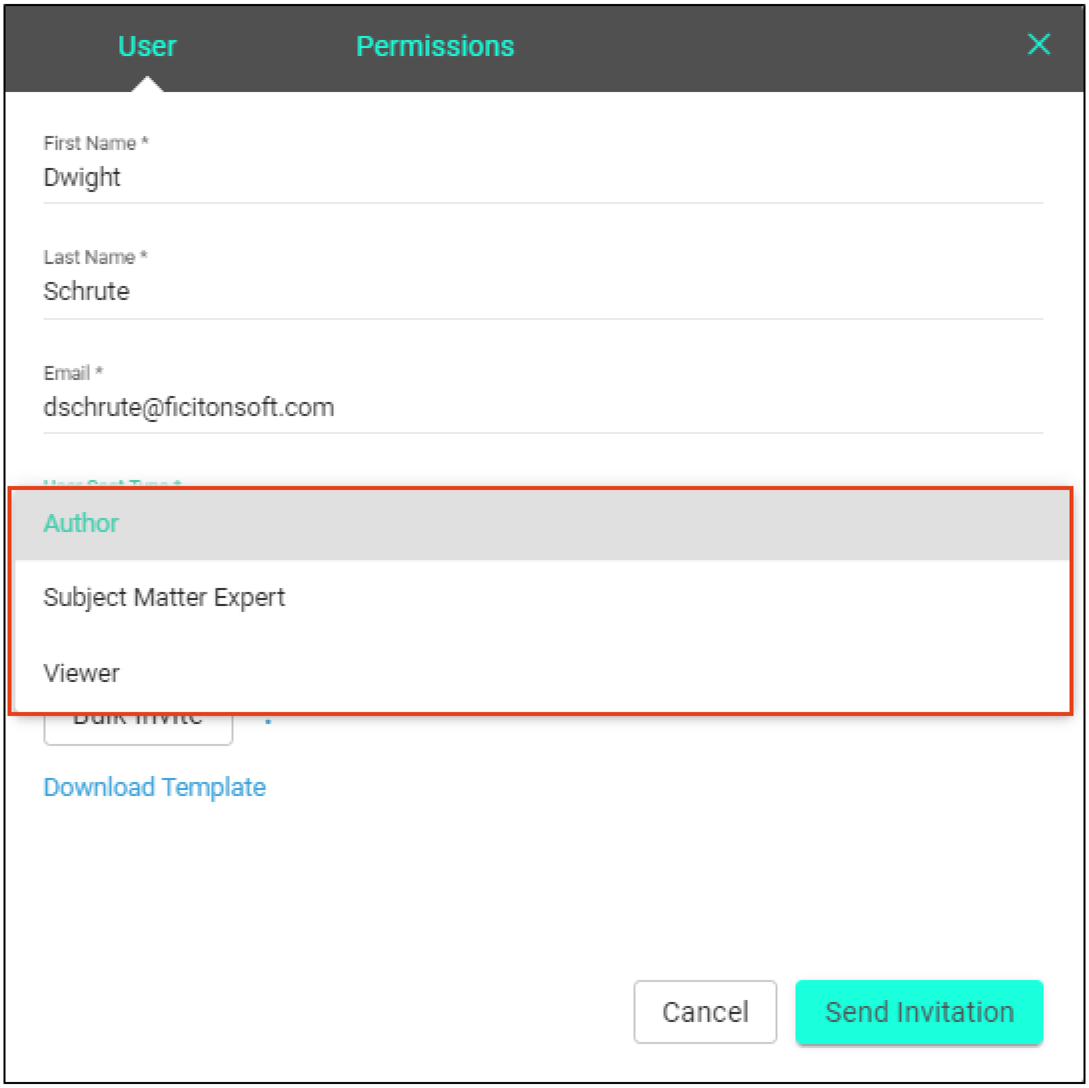
Users and Permissions

The first person to log in to MadCap Central using your company's license has “User Administration” permission. From the Users page, this person can invite other individuals to join the license.



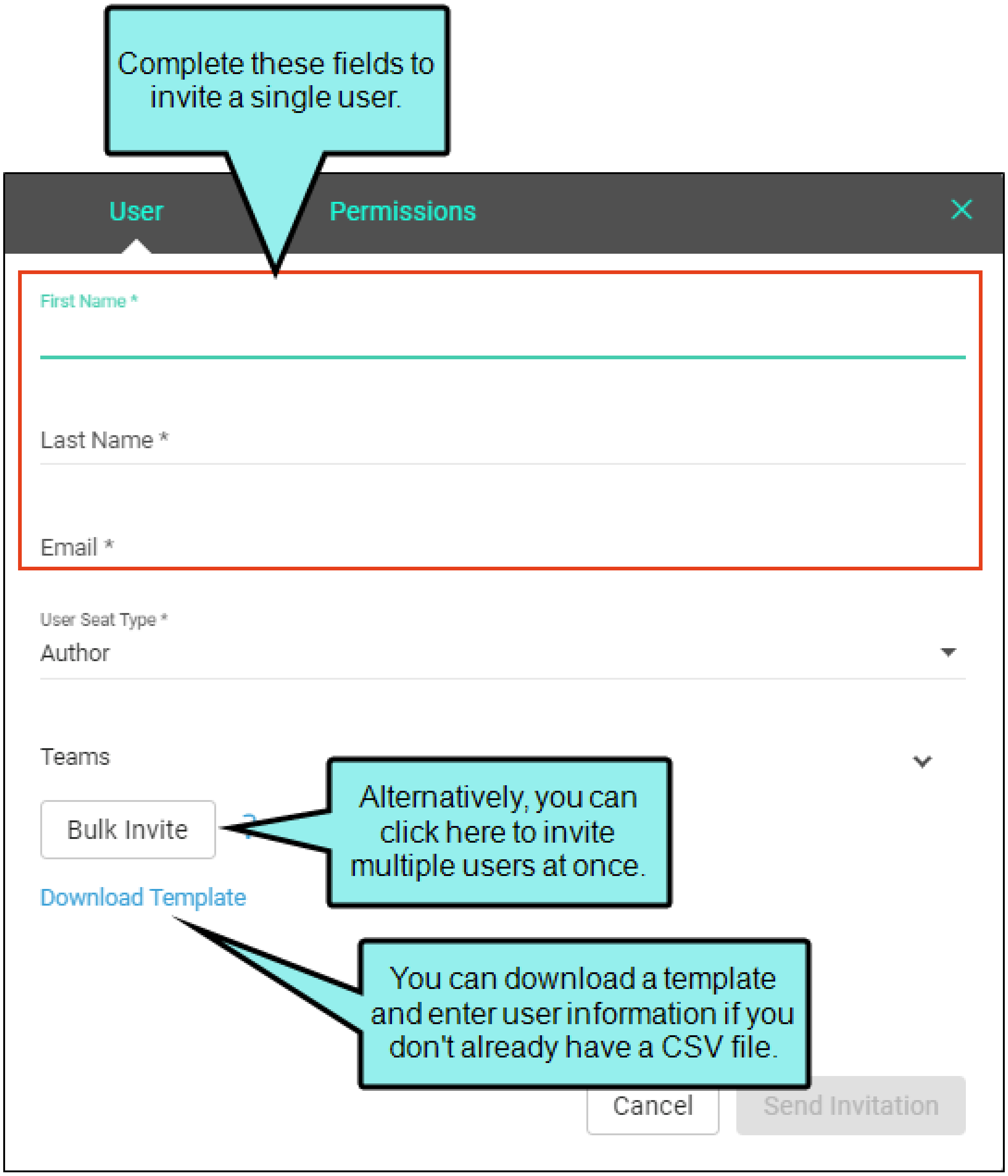
You can add multiple kinds of users.

- Author This is an individual who works in Flare projects, creating and editing content. Most of the features in Central are for authors only. When necessary, this person can send topics and snippets that need to be reviewed by others. Along with the reviewers, the author can open and edit files in the lightweight editor in Central.
- Subject Matter Expert This is an individual whose purpose in Central is to review topics and/or snippets sent by an author. Therefore, a SME only sees the parts of the Central user interface that are necessary for reviews.
- Viewer This is an individual whose only role is to view live private output. These users do not even need to belong to your company. However, they must set up a Central password; not to access Central itself, but to see live private outputs with which they are associated. Viewers can also see live output that is not set as private, just as anyone in the general public can. So if you do not need private output, you do not need to invite Viewers to the license.



NOTE A person who has the Author user type can function as either the original author or a reviewer during the file review process.

You can invite users one at a time or in bulk by pointing to a CSV file containing each person's email, first name, then last name. If you do not yet have a CSV file, you can download a template from Central and complete it with your users' details.



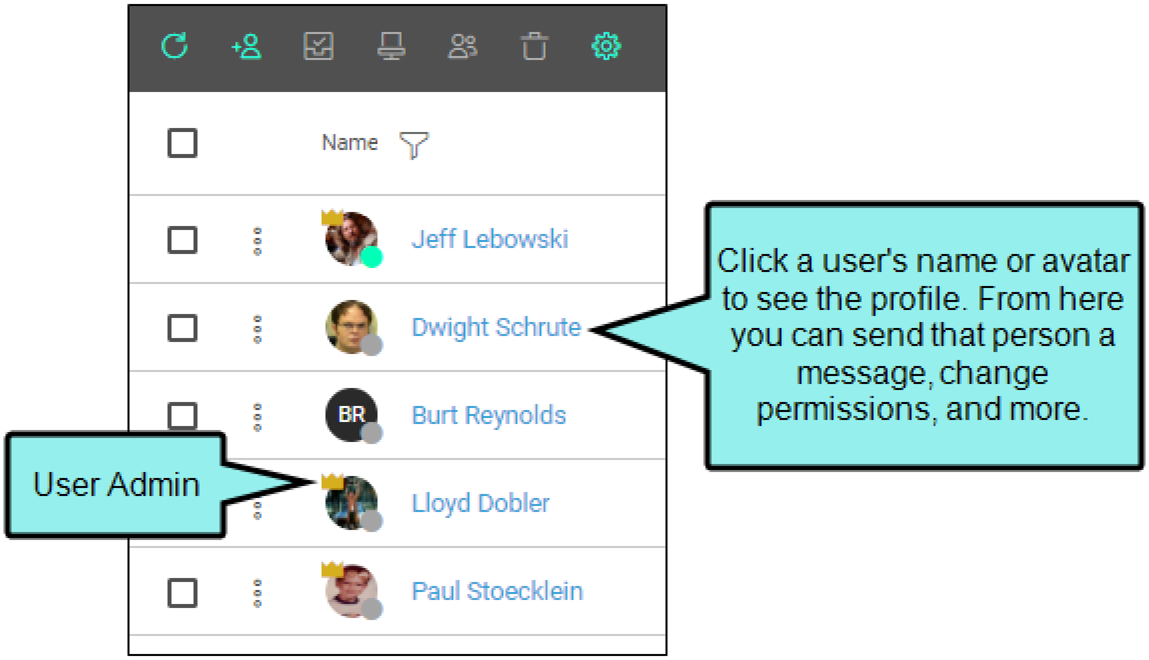
When inviting multiple users, your CSV file should be organized like this. Notice the spelling of the email, first name, and last name column headings.

	A	B	C	D
1	Email	FirstName	LastName	
2	ldobler@fictionsoft.com	Lloyd	Dobler	
3	breynolds@fictionsoft.com	Burt	Reynolds	
4	wsmith@fictionsoft.com	Will	Smith	
5	hsimpson@fictionsoft.com	Homer	Simpson	
6	sbsquarepants@fictionsoft.com	SpongeBob	Squarepants	
7				
8				
9				
10				

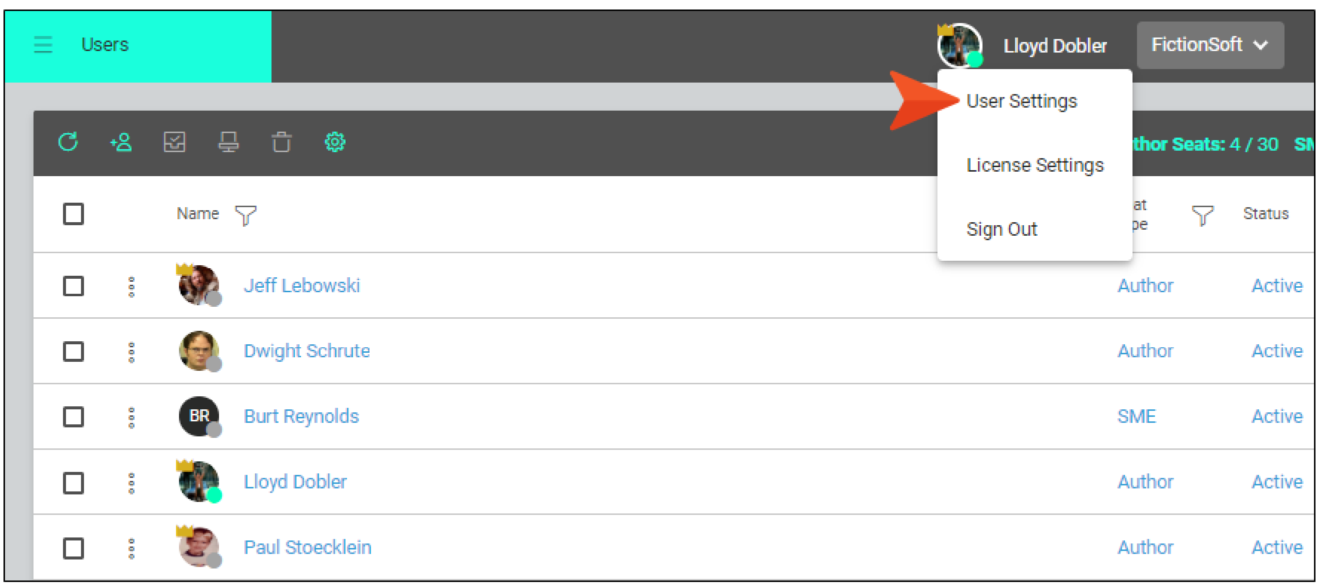
A person with “User Administration” rights can assign permissions to other users (Authors only, not SMEs or Viewers). Some users might receive only basic permissions, while others might be granted higher administrative rights.

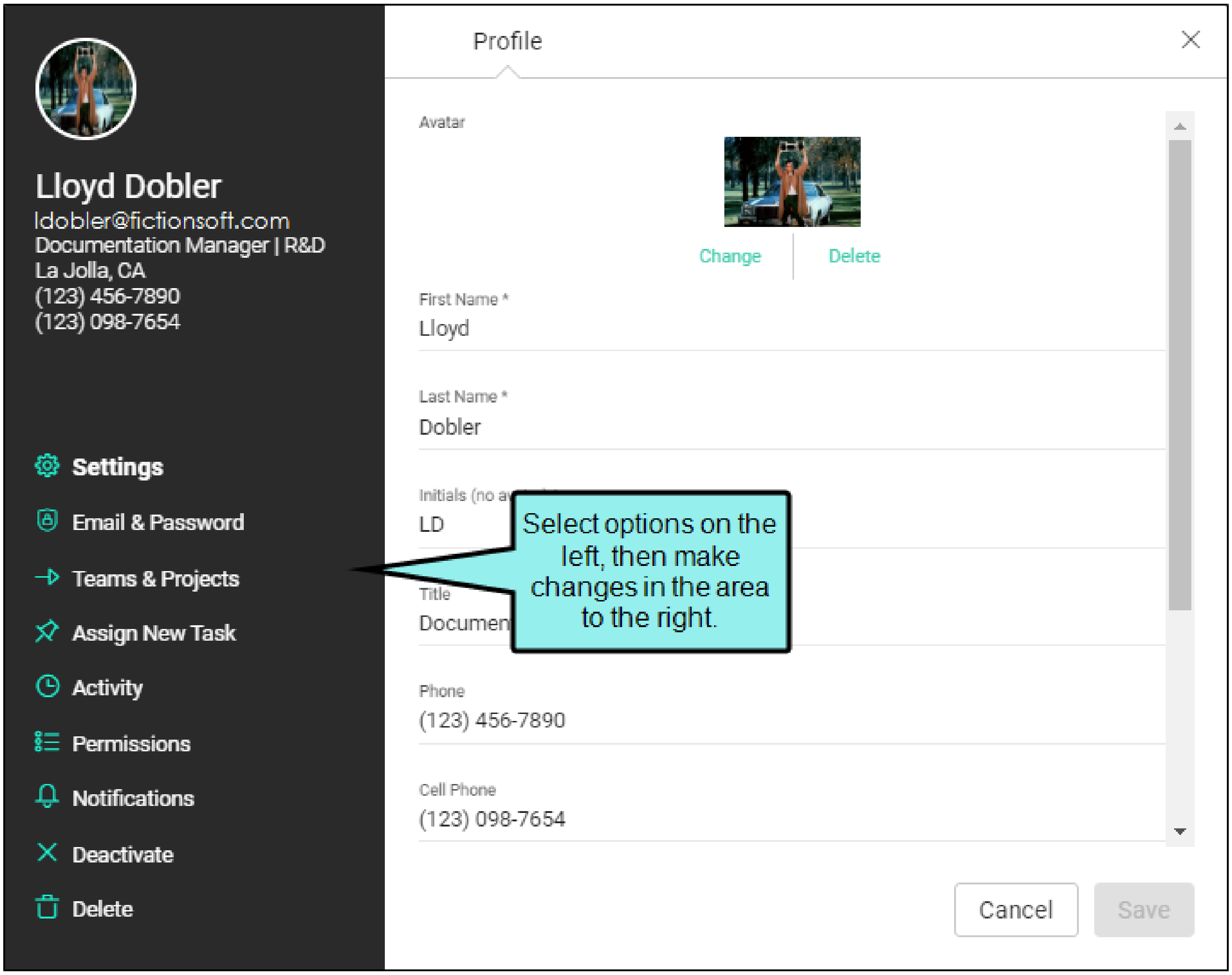
When a new user is invited, that person receives an email. The individual must click a link to complete the invitation to Central. This allows the user to confirm or edit his or her name, and set up a password. After the user submits the information, the account is activated.

From the Users page, you can see all other users in the system, view their profiles, and contact them. Users with a crown icon have "User Administration" permission.



If you click your avatar or name at the top of the interface, you can select **User Settings** to view and modify your profile.



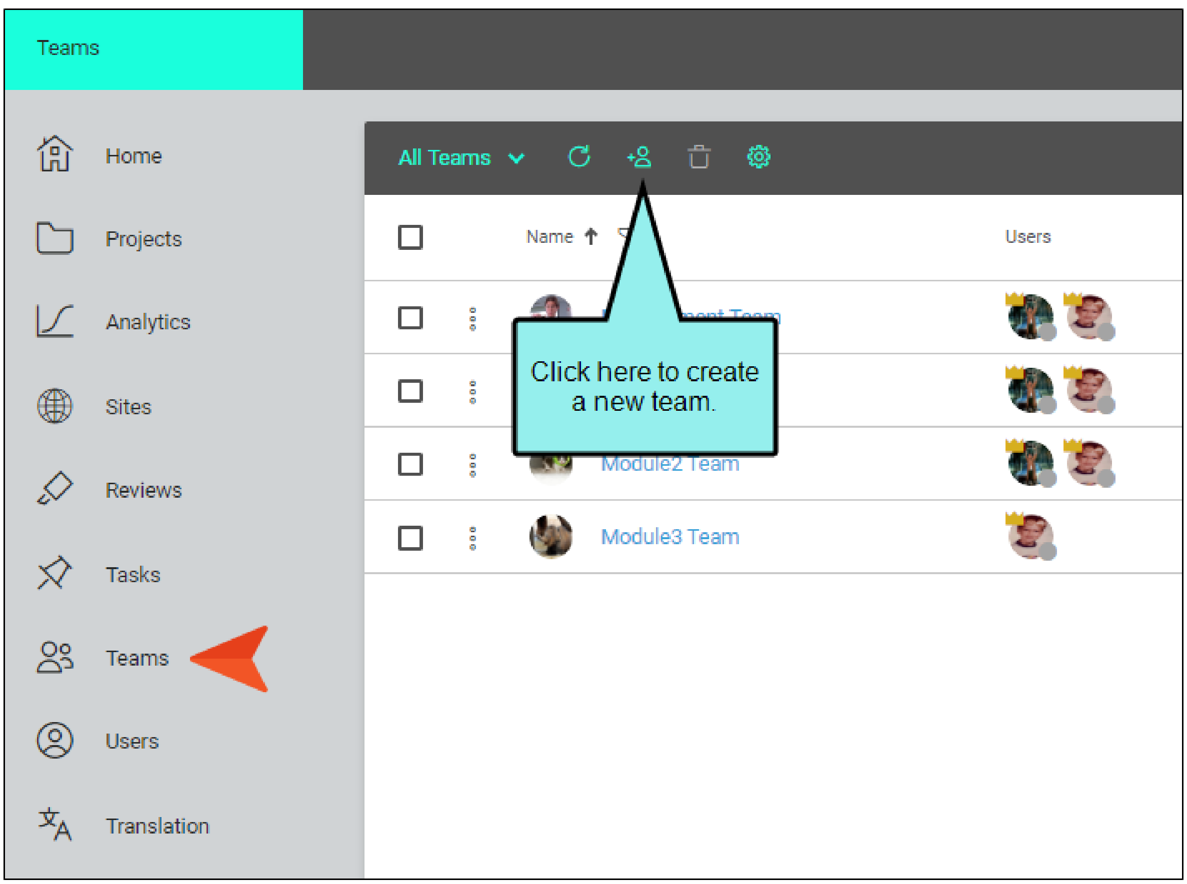


NOTE The notifications feature—which can be seen after you click **Edit** in the Profile dialog—is available for Author user types only, not for SMEs or Viewers.

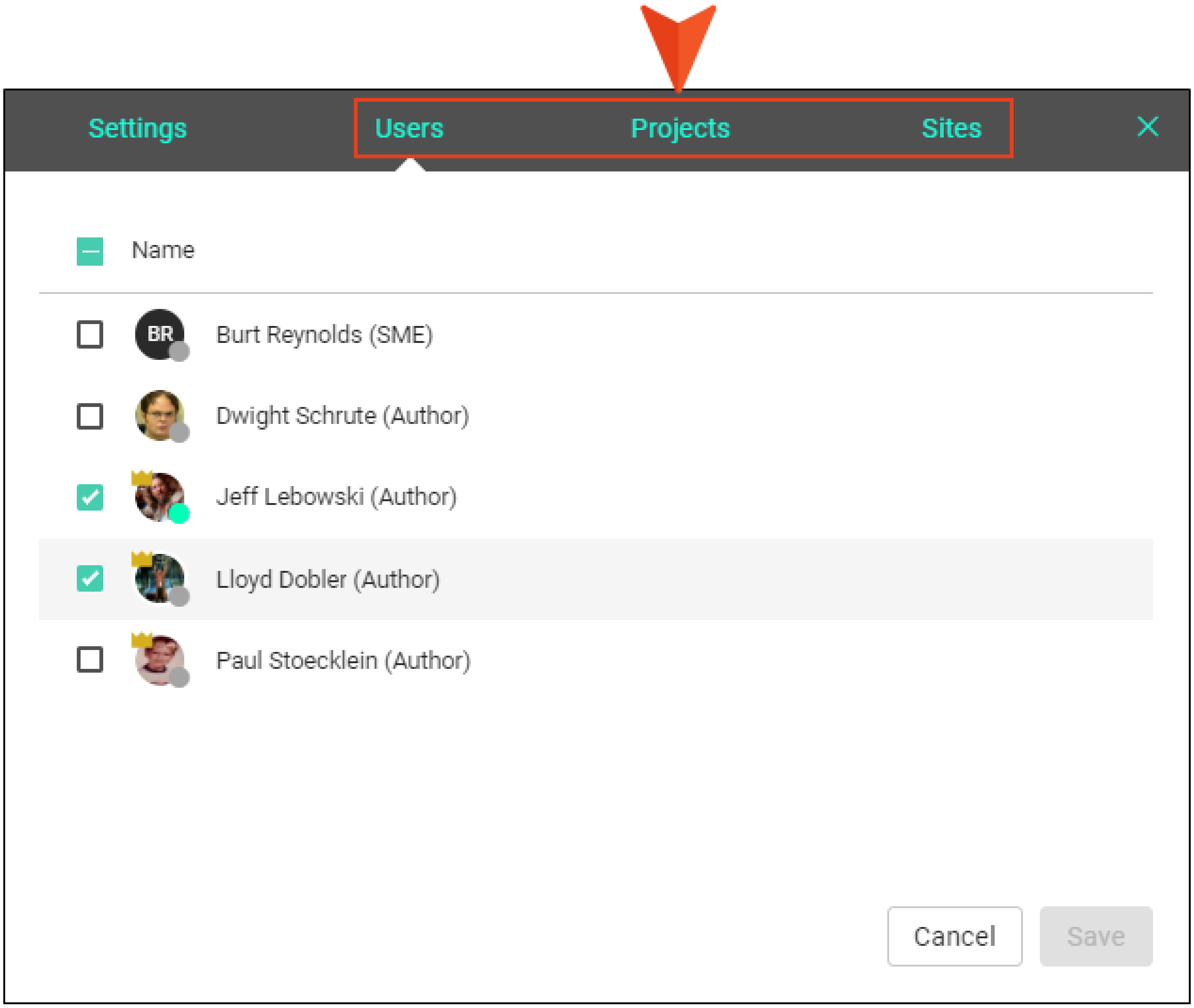
CHAPTER 4

Teams

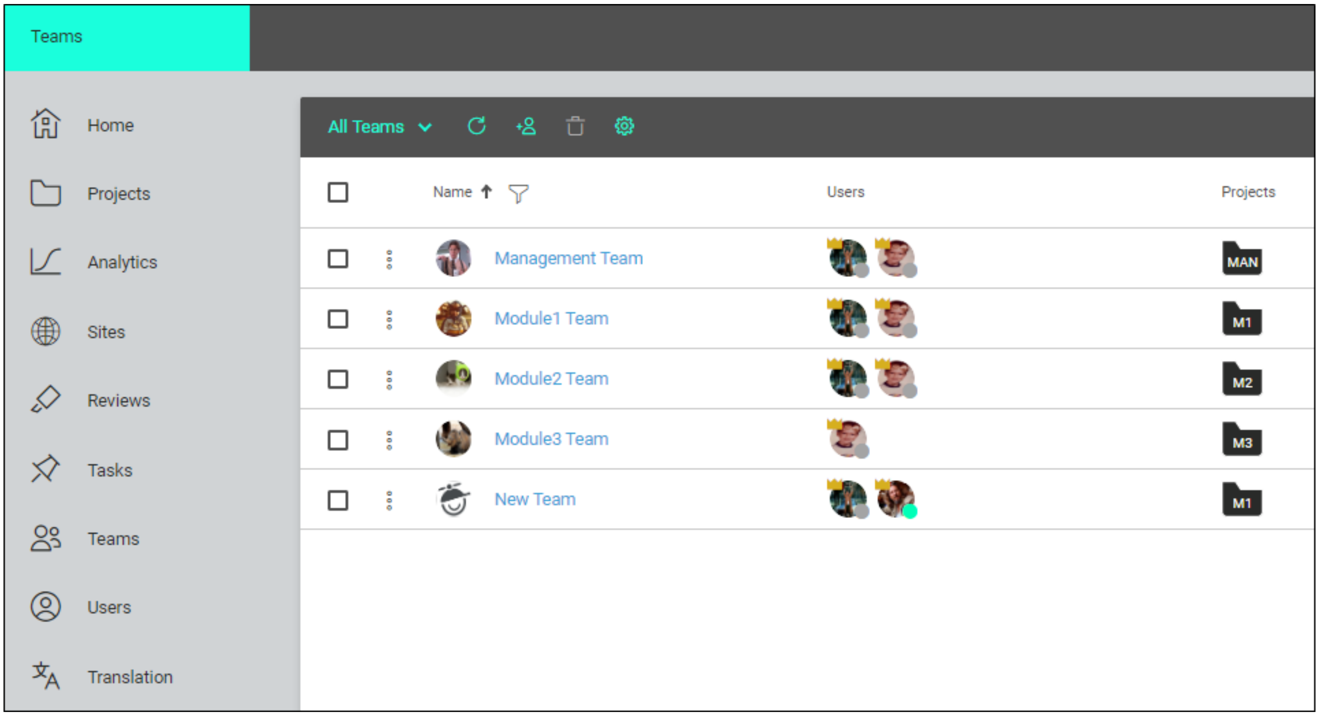
The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects. Teams are also important if you produce private output, because only members of a team that is associated with the private site can view that output.



Not only can you associate specific users with a team, but you can also link teams to uploaded Flare projects and sites.



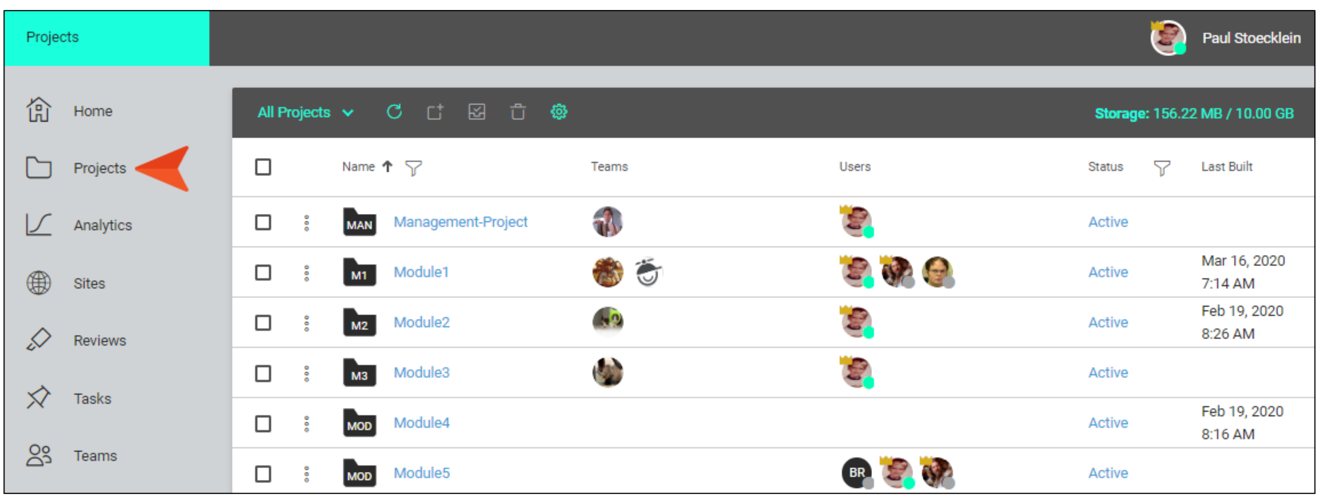
After teams are created, you can see the users and projects associated with each one.



CHAPTER 5

Projects and Builds

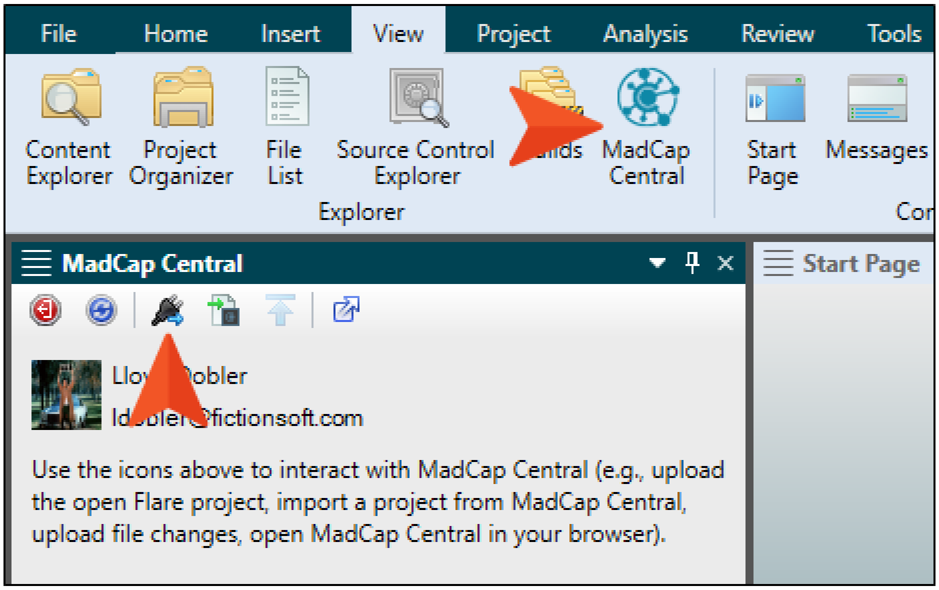
The Projects page displays a grid, which lists all MadCap Flare projects that have been uploaded to your Central license. These are copies of the local projects located on users' desktops. There are many good reasons to upload (i.e., bind) Flare projects to Central, including (but not limited to) the following: (1) You can let Central build and host your output, which means you can publish without having to involve an IT department; (2) the connection between your local Flare project files and the cloned files on Central can be used as a source control solution, (3) you can use Central as a platform for topic reviews, and (4) you can manage progress on topic development by using checklists.



This chapter discusses the following:

Uploading Projects

You do not upload projects from within Central. Instead, you do this from the desktop project itself, using a recent version of Flare that supports it.

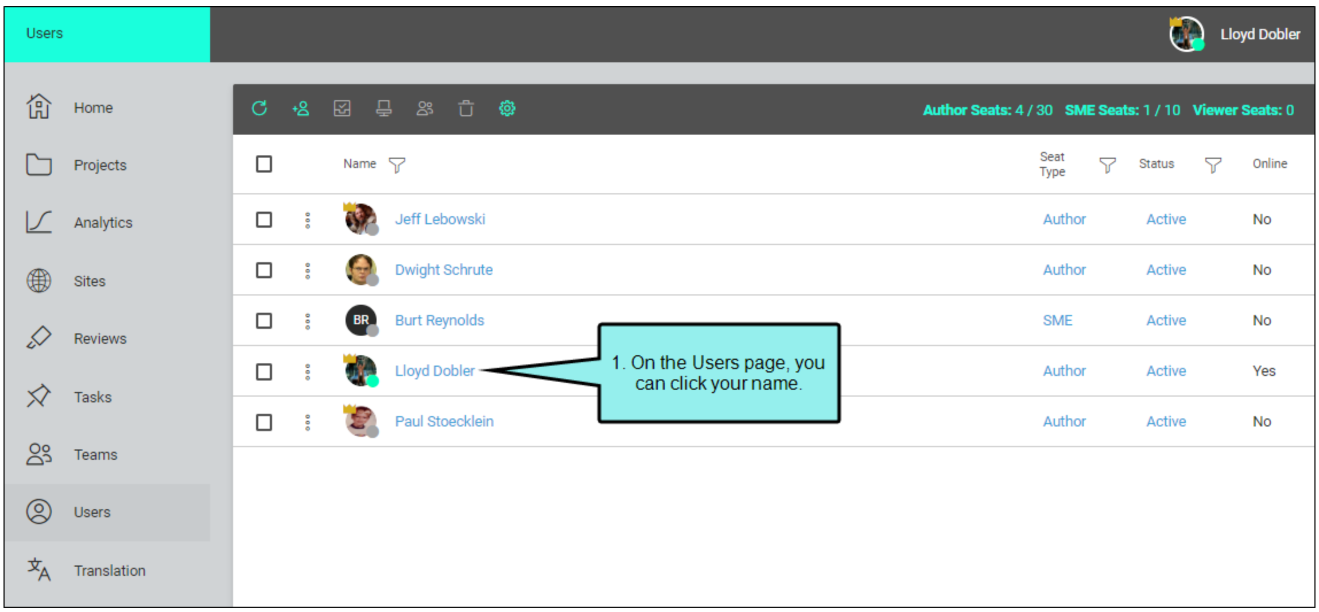


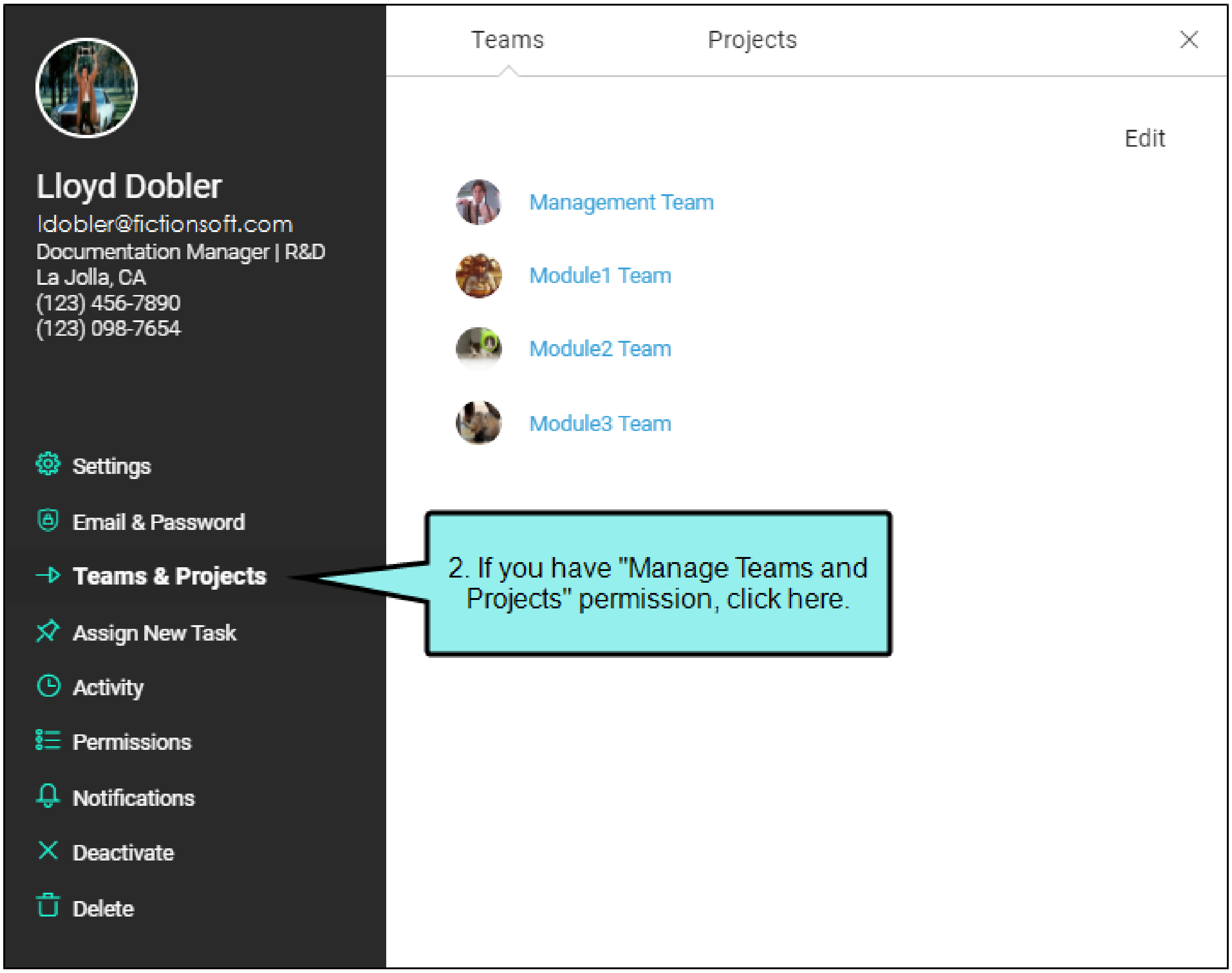
IMPORTANT Central is not a replacement for your desktop Flare application. You continue to author your project content locally in Flare. If you are working in a single-bound model, you then commit your files and synchronize (pull, push) your changes with the cloned project on Central. If you are working in a dual-bound model, you use your normal (third-party) source control tool to synchronize your files and then use Flare to push those changes to Central. Whichever method you use, this ensures that your files are up-to-date in Central before you build output.

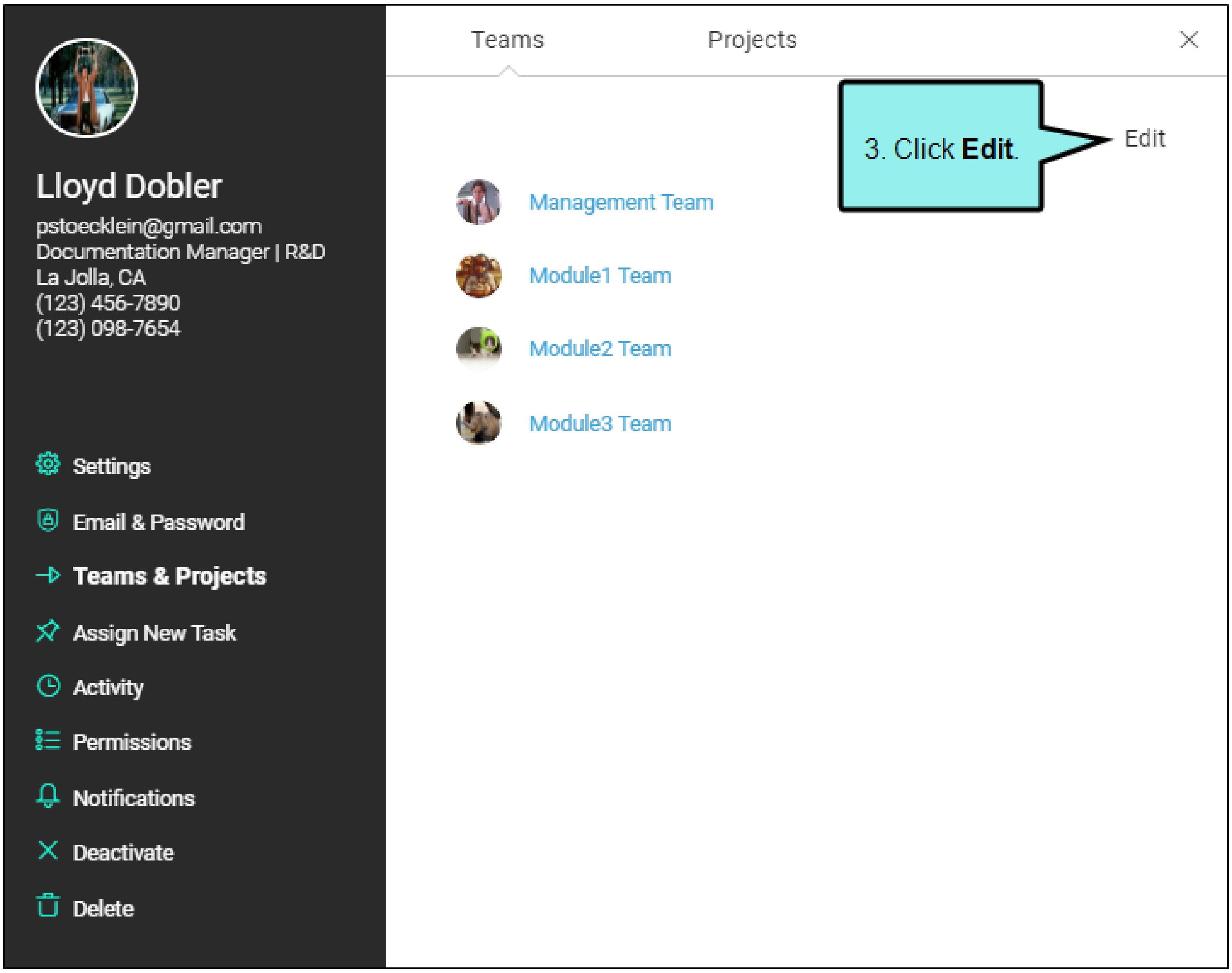
NOTE When you upload a Flare project to Central, the files are connected to Central via an integrated source control system. Your interaction with source control can follow one of two models—single-bound or dual-bound. For more information, see the online Help or the *Projects and Builds Guide*.

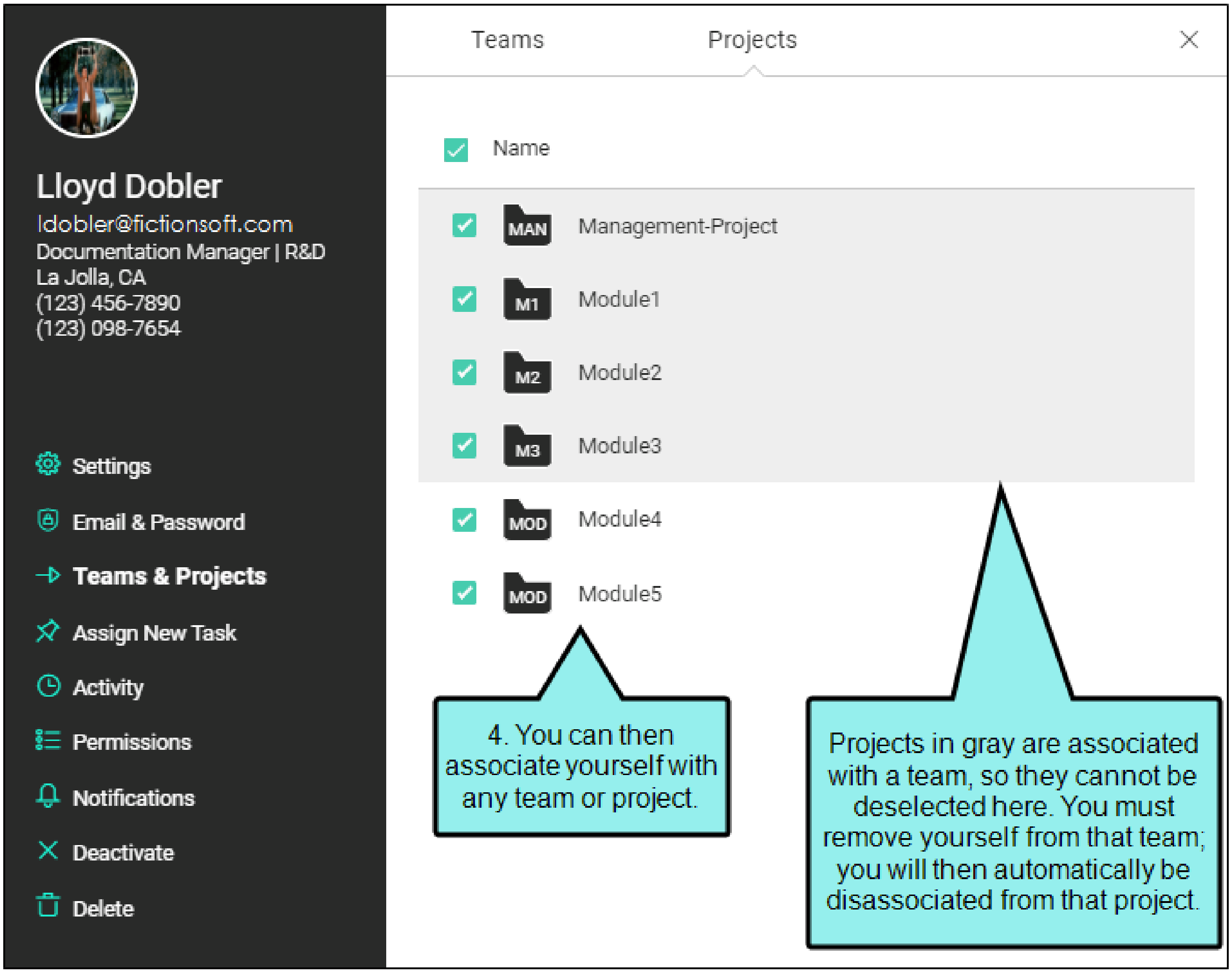
Associating Users With Projects

All users can see all the projects listed in the grid on the Projects page. However, to open a project (by clicking on its name) or take action on it, you must be associated with that project. There are a few ways to become associated with a project. First, you can upload a project to Central yourself. Second, another user can add you to his or her project. Third, if you have "Manage Teams and Projects" permission, you can open your profile and add yourself to a project. And fourth, if another user sends files from a project for you to review, you will automatically become associated with that project.




Lloyd Dobler
ldobler@fictionsoft.com
Documentation Manager | R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654
Settings
Email & Password
Teams & Projects
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Teams
Projects
Edit
Management Team
Module1 Team
Module2 Team
Module3 Team
2. If you have "Manage Teams and Projects" permission, click here.


Teams
Projects
3. Click **Edit**.
Edit
Lloyd Dobler
pstoecklein@gmail.com
Documentation Manager | R&D
La Jolla, CA
(123) 456-7890
(123) 098-7654
Management Team
Module1 Team
Module2 Team
Module3 Team
Settings
Email & Password
Teams & Projects
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete


Lloyd Dobler
ldobler@fictionsoft.com
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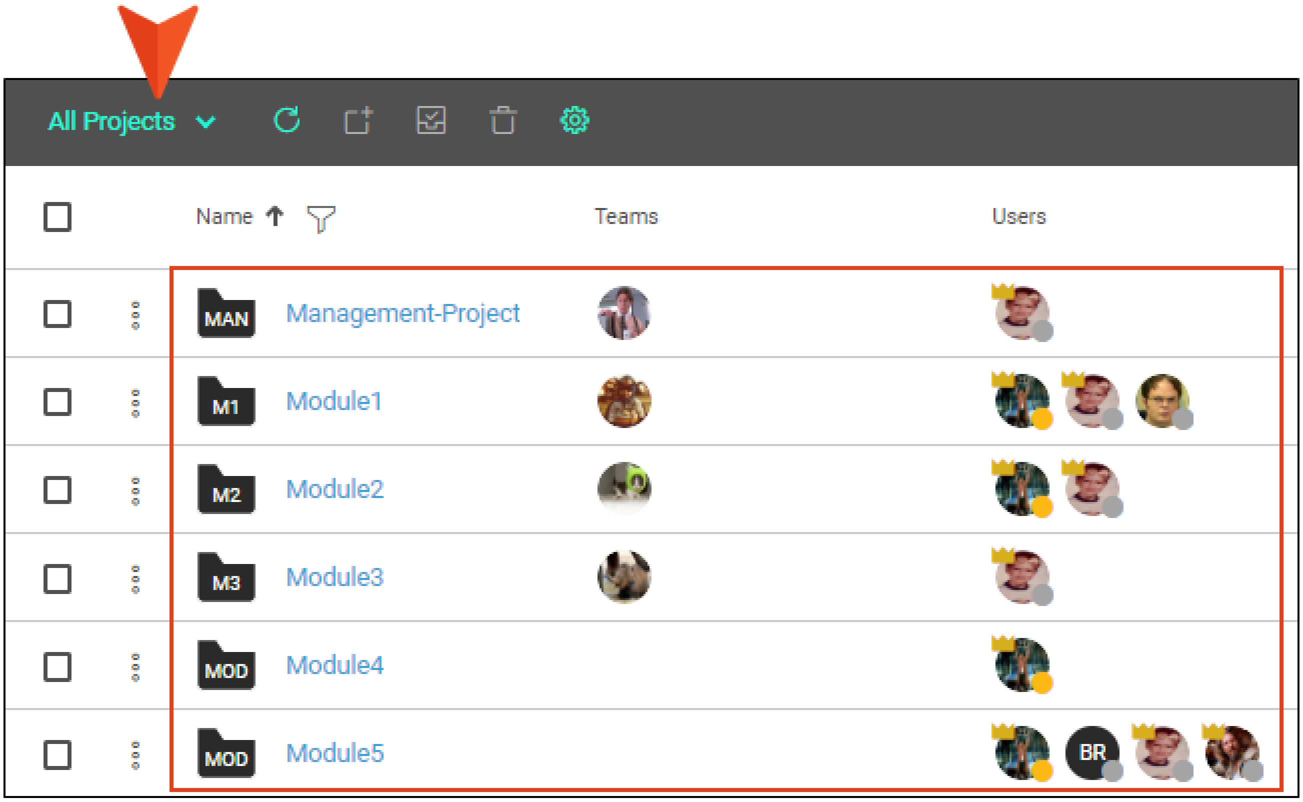
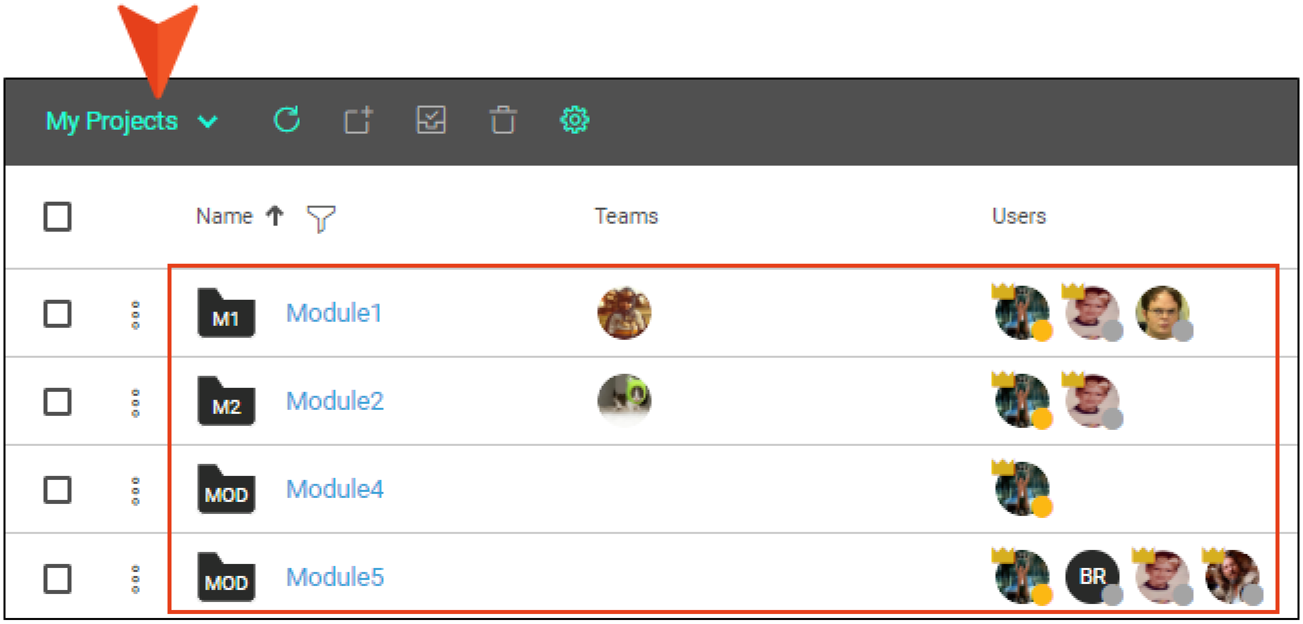
La Jolla, CA
(123) 456-7890
(123) 098-7654
Settings
Email & Password
Teams & Projects
Assign New Task
Activity
Permissions
Notifications
Deactivate
Delete
Teams
Projects
Name
MAN
Management-Project
M1
Module1
M2
Module2
M3
Module3
MOD
Module4
MOD
Module5
4. You can then associate yourself with any team or project.
Projects in gray are associated with a team, so they cannot be deselected here. You must remove yourself from that team; you will then automatically be disassociated from that project.

There is also a drop-down on the Projects page that lets you switch between seeing all projects and only the projects you are associated with.




My Projects
Name
Teams
Users
M1
Module1
M2
Module2
MOD
Module4
MOD
Module5
BR

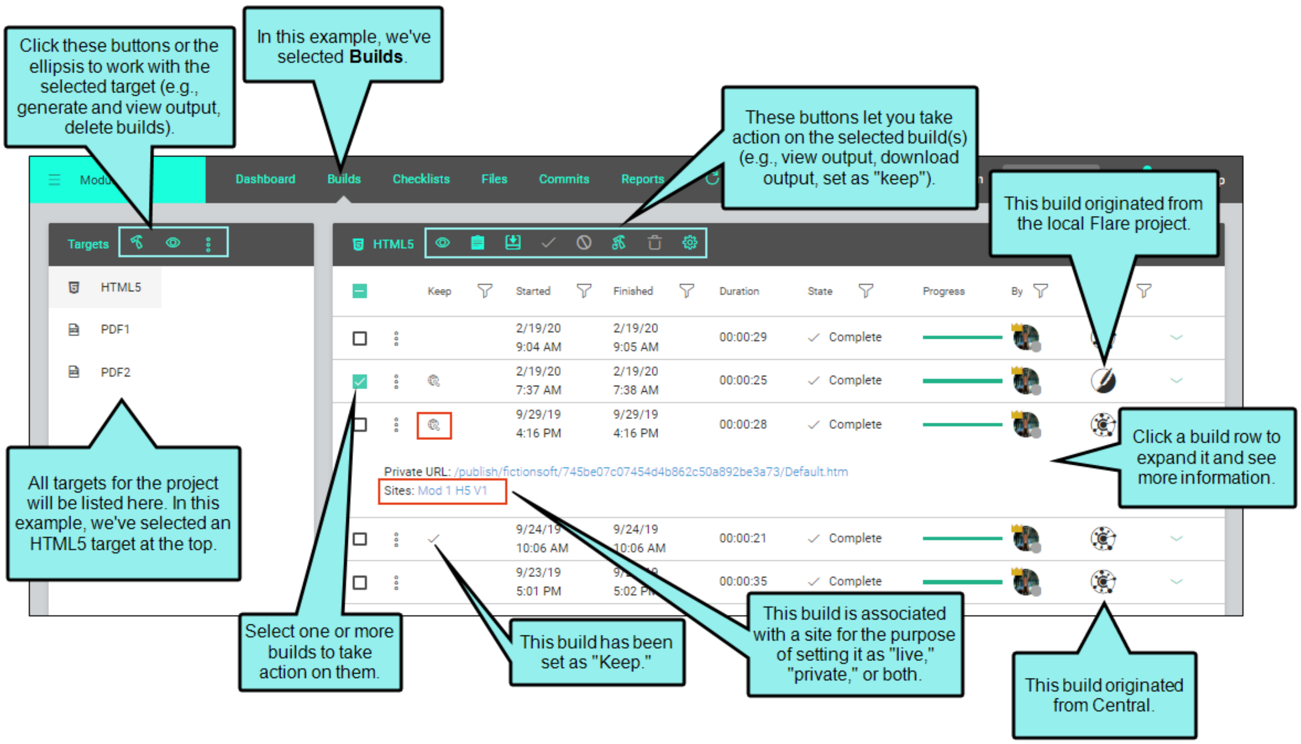
Project Dashboard

Once you are associated with a project in Central, you can open it from the main Projects page by clicking on the project name.

When you first open a project in Central, it displays by default in Dashboard view. As with your Home dashboard, it will be empty at first. You can populate each project dashboard with widgets that you find useful. See "Widgets" on page 66.

Builds

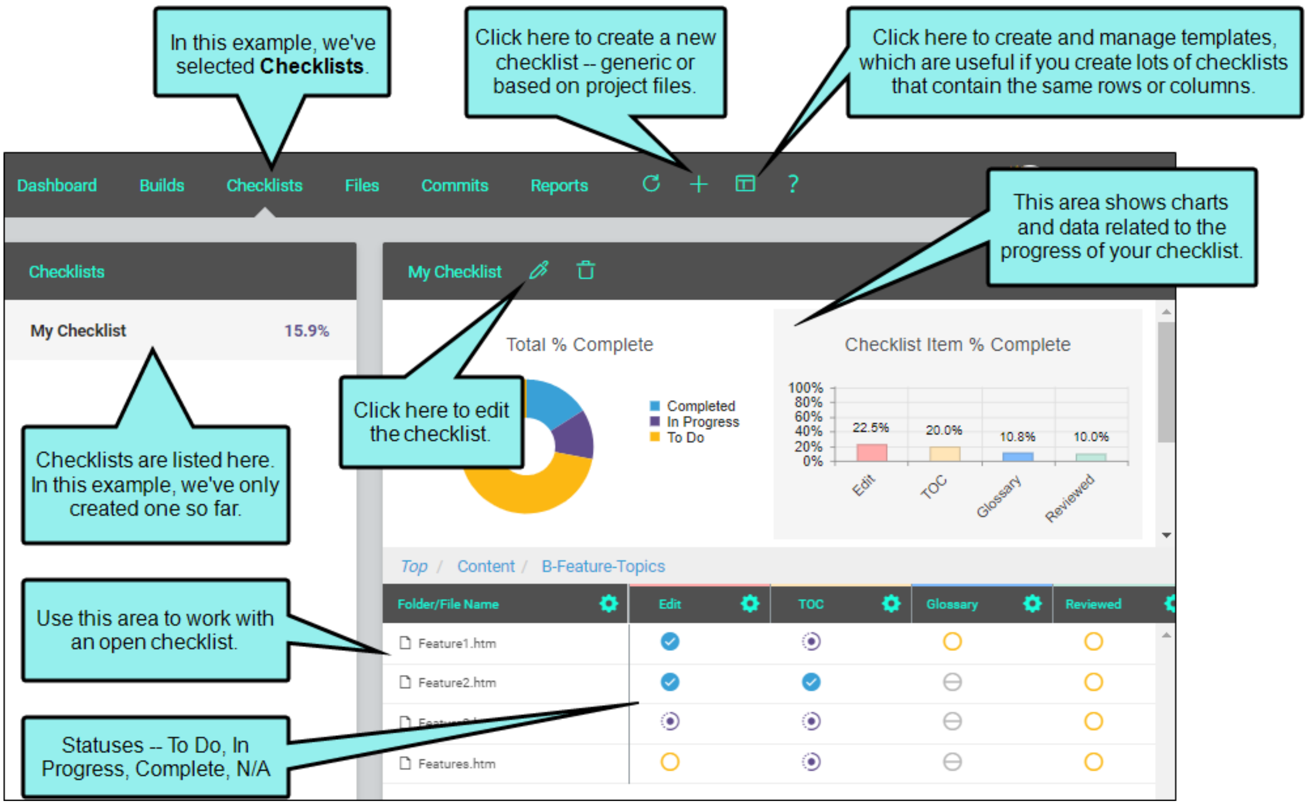
You can click **Builds** at the top of the interface to work with the targets in the project. The Builds view lets you generate, open, and manage output from a target. To set output as “live” (i.e., it can be viewed by the public) or configure domains (URLs), you can use the Sites page (see "Sites" on page 44).



Checklists

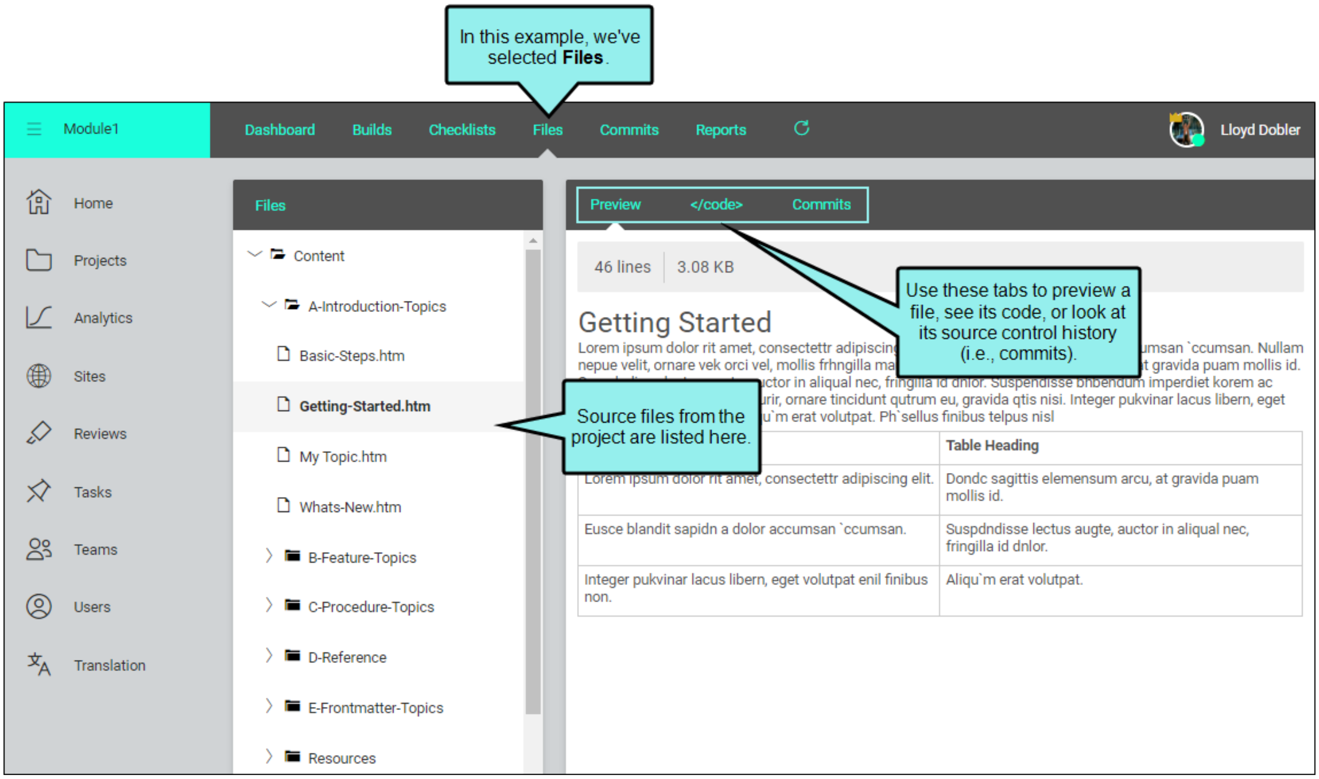
You can click **Checklists** at the top of the interface to create and manage checklists related to your project.

Checklists might have to do with specific files (e.g., topics) in your project. These are called "Project Files" checklists. You can create custom columns for whatever types of activity you want to track for each file, and you can use a note column for specific information about each row. Alternatively, you might create checklists for random things you need to accomplish, such as a product release "To Do" list. These are called "Generic" checklists, and they let you manually name each column and row. You can set the appropriate status on each item as you work, and the top of the interface will show a chart and percentages as you progress through the checklist.



Files

You can click **Files** at the top of the interface to see a read-only view of all files in your project in a few different ways (preview, code, and history).

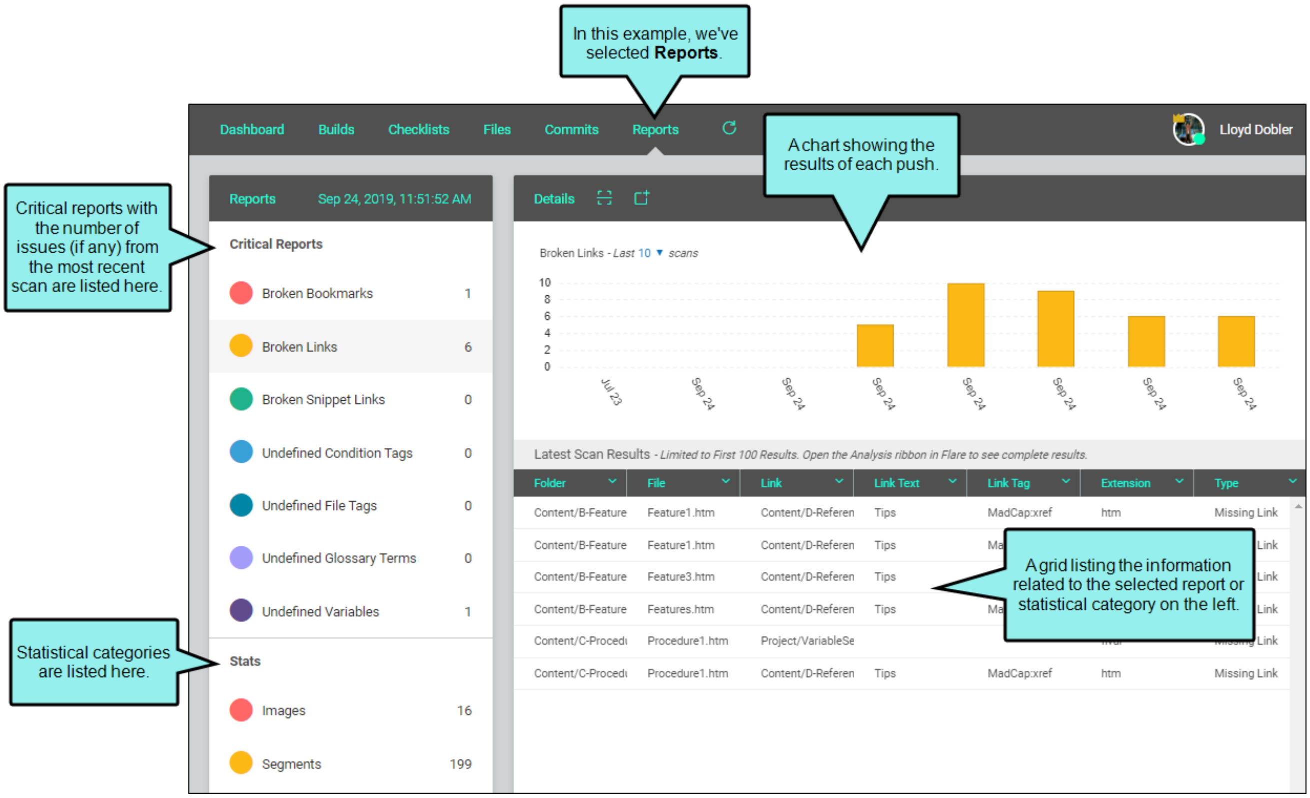


Commits

You can click **Commits** at the top of the interface to see details of all the source control changes that have taken place over time for the project.

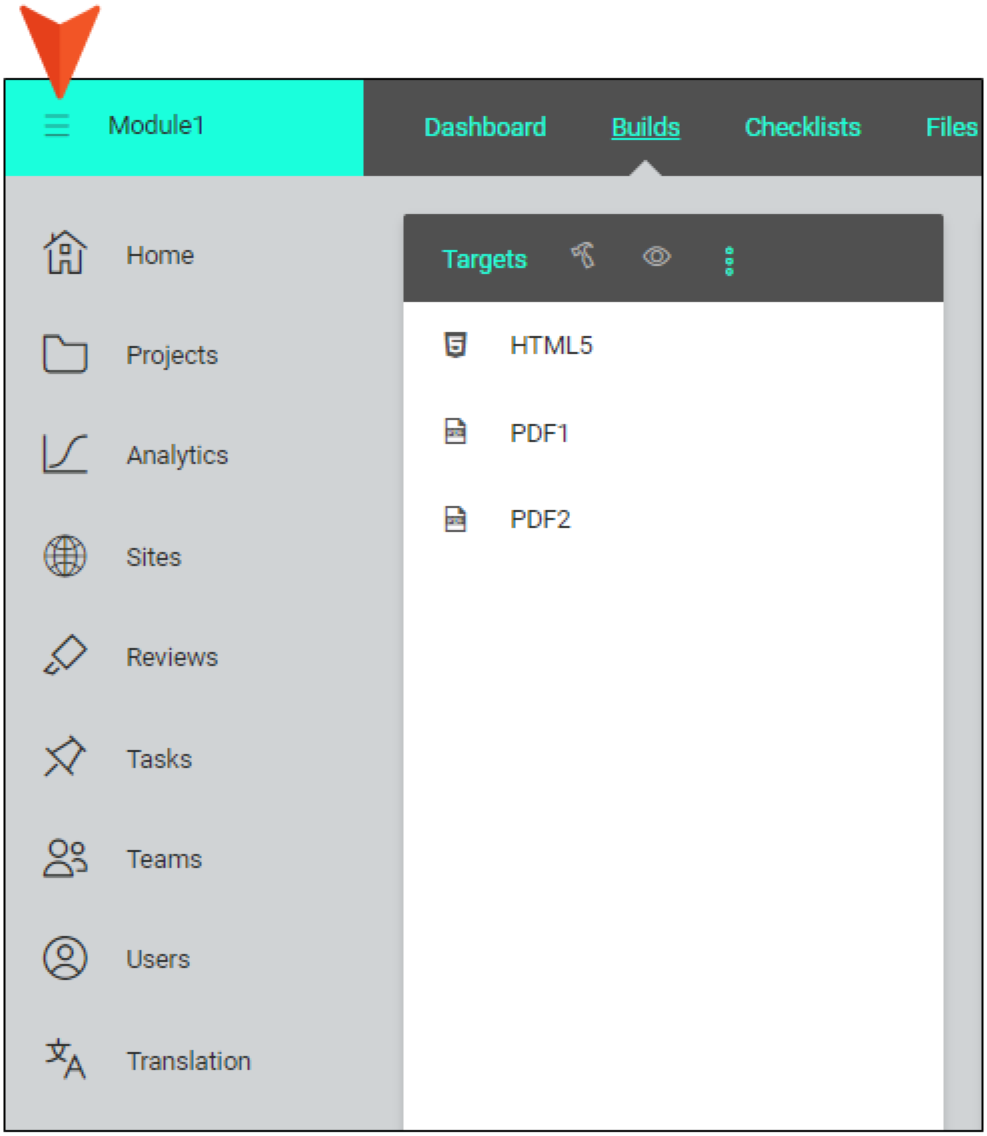
Reports

After opening a project in Central, you can click **Reports** at the top of the interface to see various types of reports and statistics. When you select a report or statistical category on the left, a chart and grid are populated on the right with details.

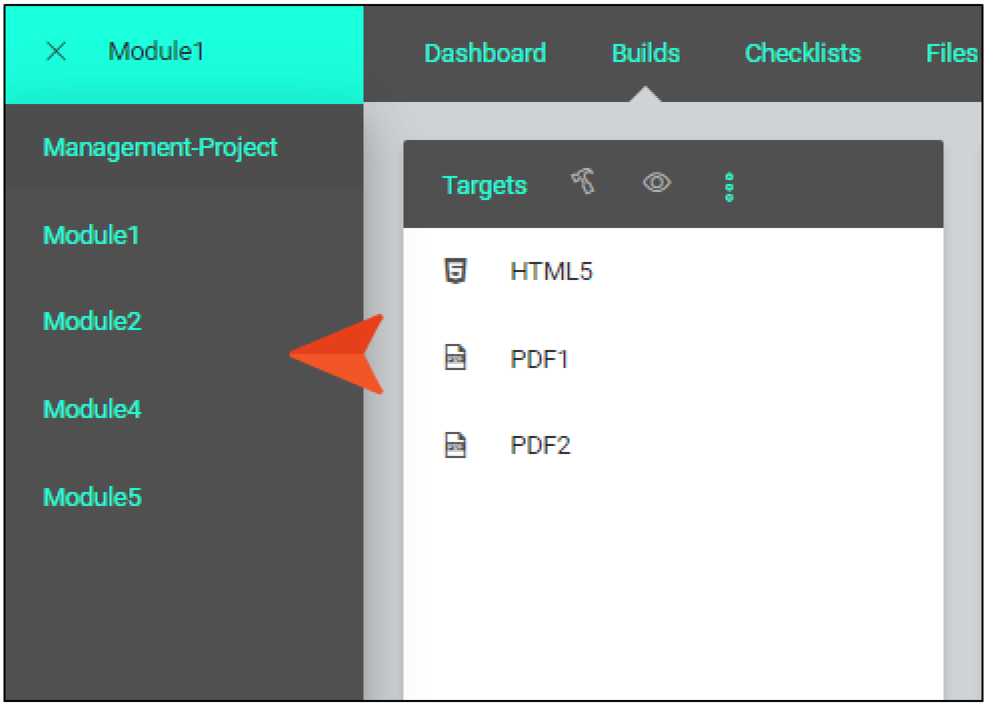


Accessing Other Projects

Once you've opened a project in Central, you can access a drop-down in the upper-left corner of the interface.

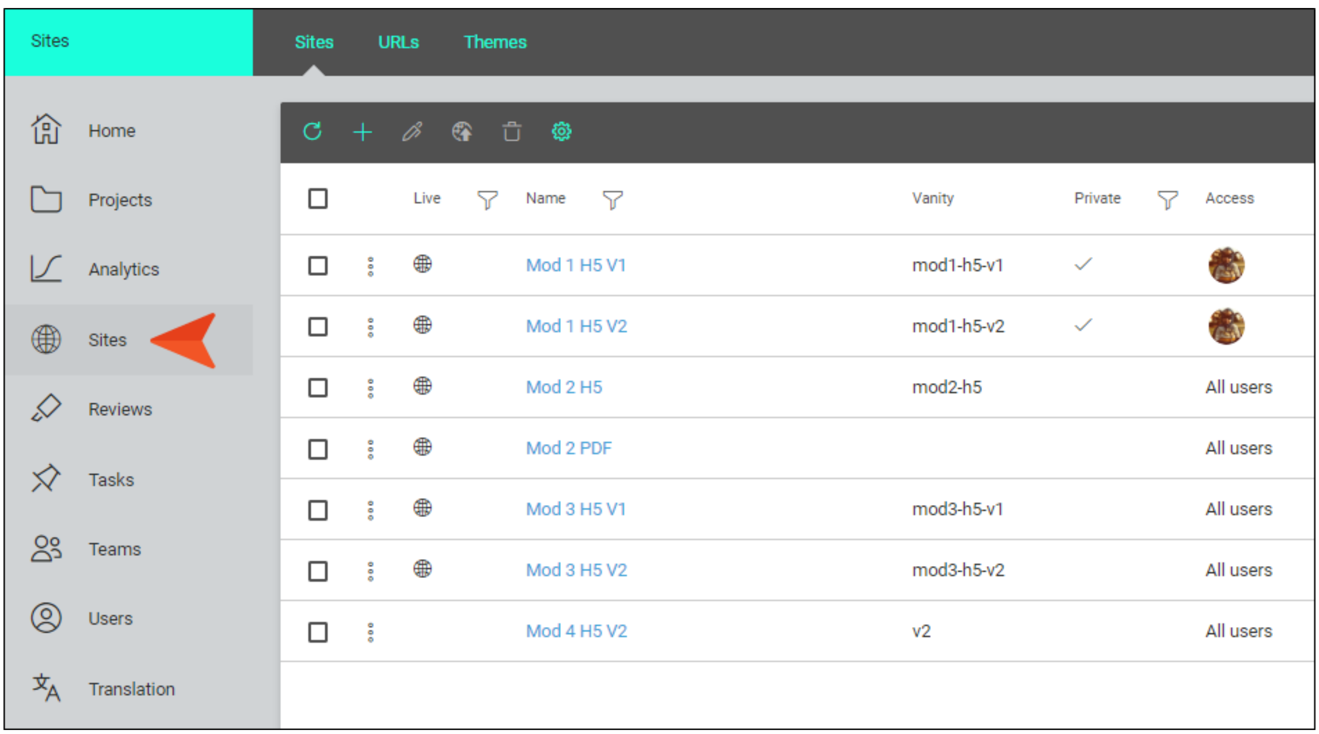


From this drop-down, you can quickly navigate to any other projects that you have permission to open. This is quicker than going back to the main Projects page grid to open another project.



Sites

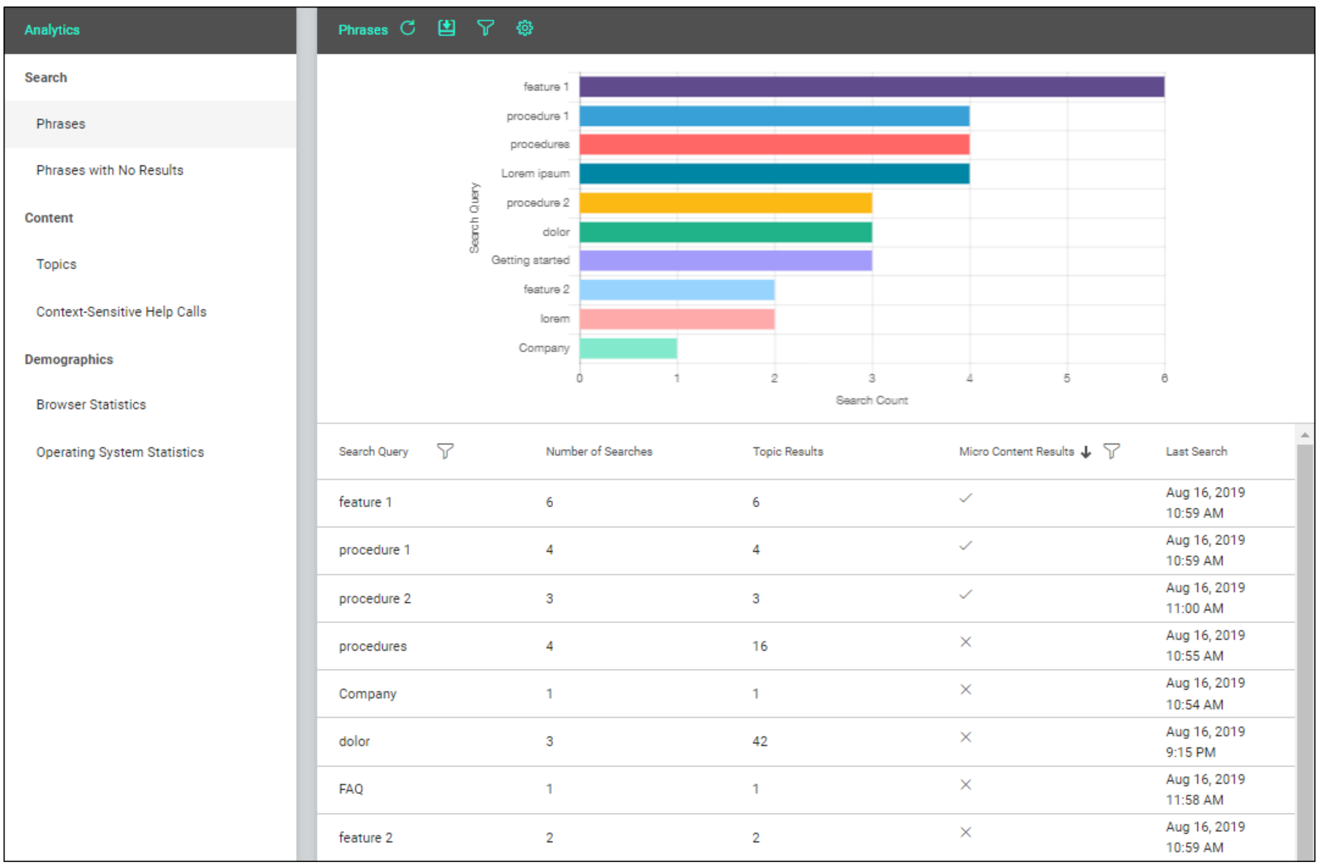
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Three page views are available: Sites, URLs, Themes.



CHAPTER 7

Analytics

The Analytics page lets you view user activity on published Flare HTML5 output. This includes search phrases used, search phrases with no results, topics viewed, context-sensitive Help calls, and demographic statistics (browsers and operating systems).

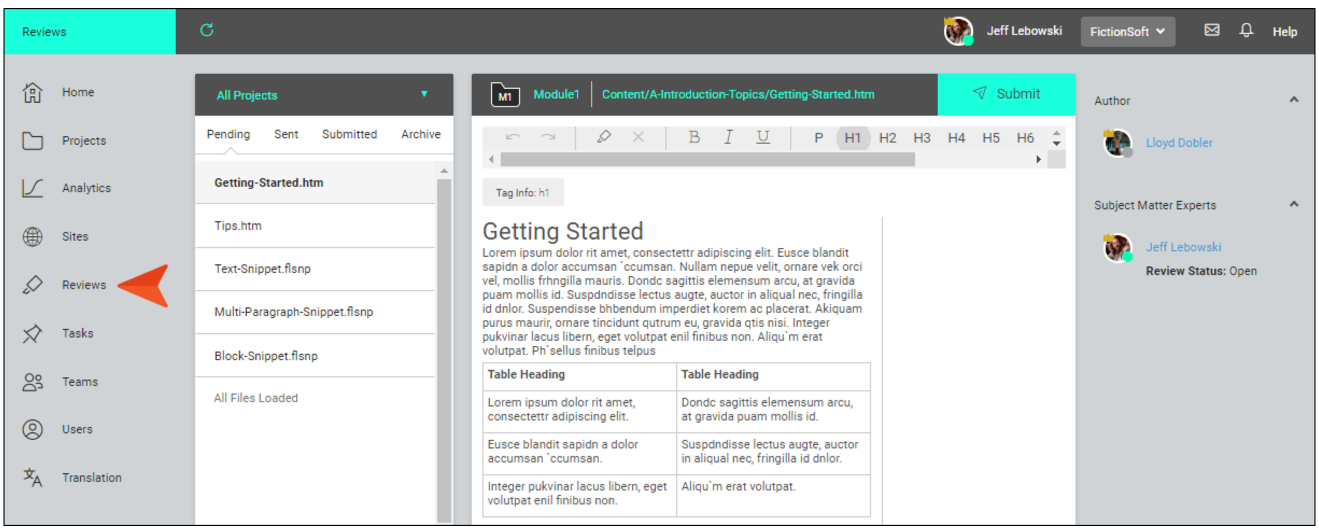


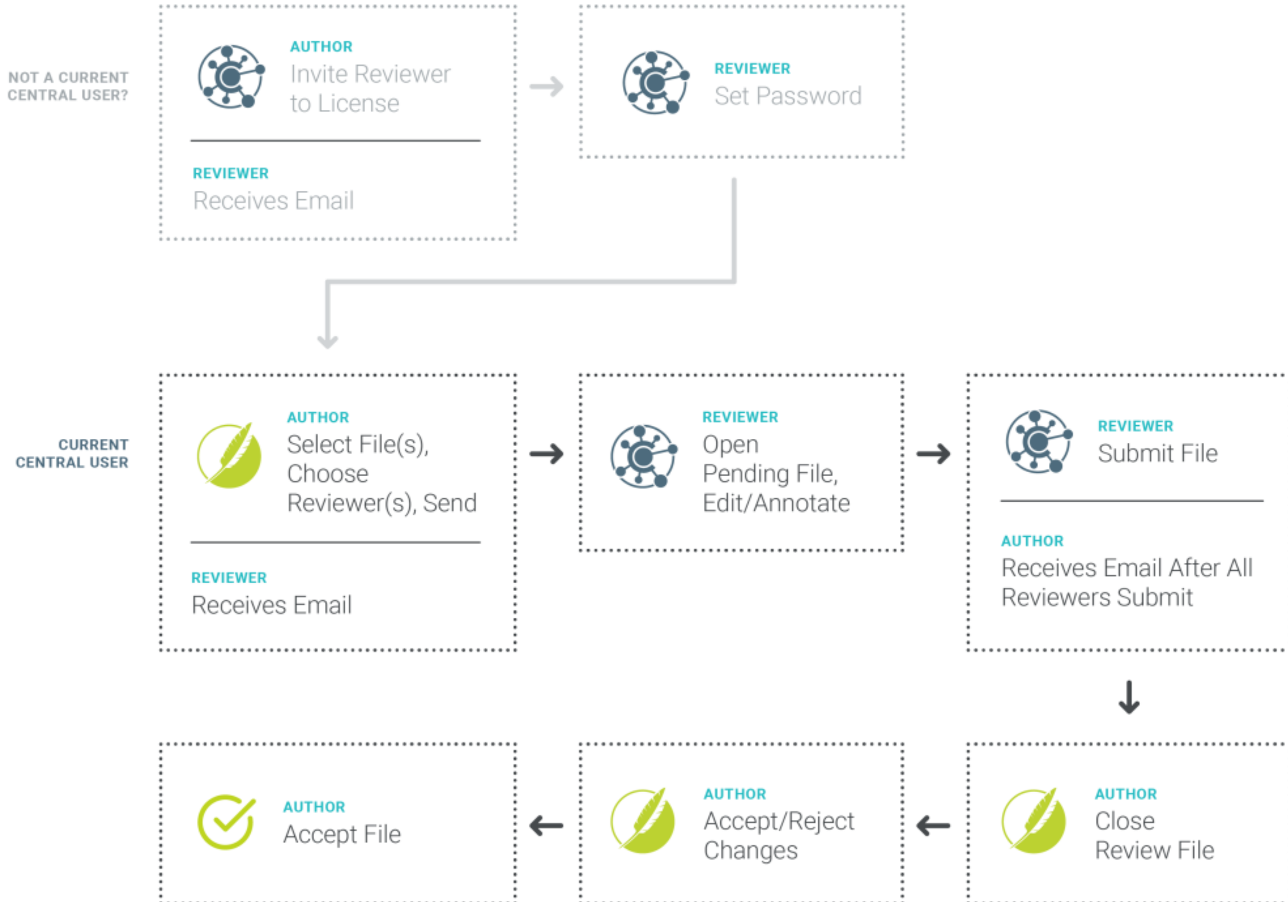
Central Analytics works on Flare projects uploaded to Central, or you can host output on your own servers. If you host the output outside of Central, you still need to use Central with a key to view the analytics data. Also, the client must be able to communicate with Central.

CHAPTER 8

Reviews

The Reviews page lets you view, edit, and manage Flare files that have been sent for review. Other review tasks (e.g., choosing and sending files for review) are done from Flare.





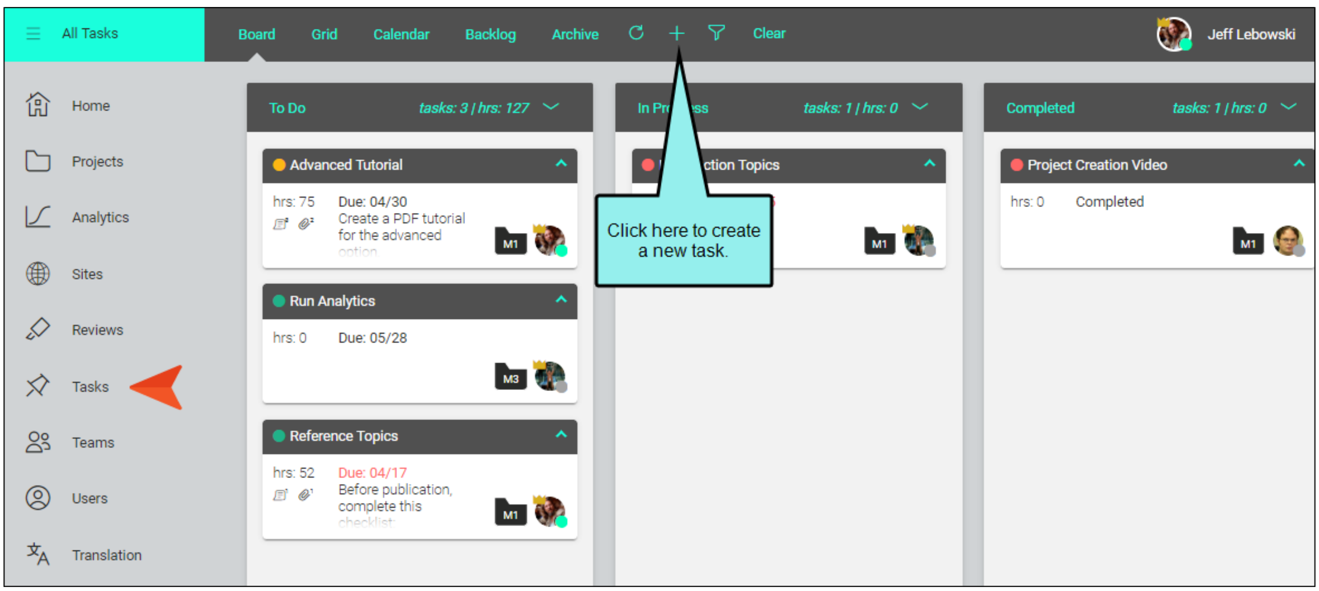
Benefits of this review workflow include:

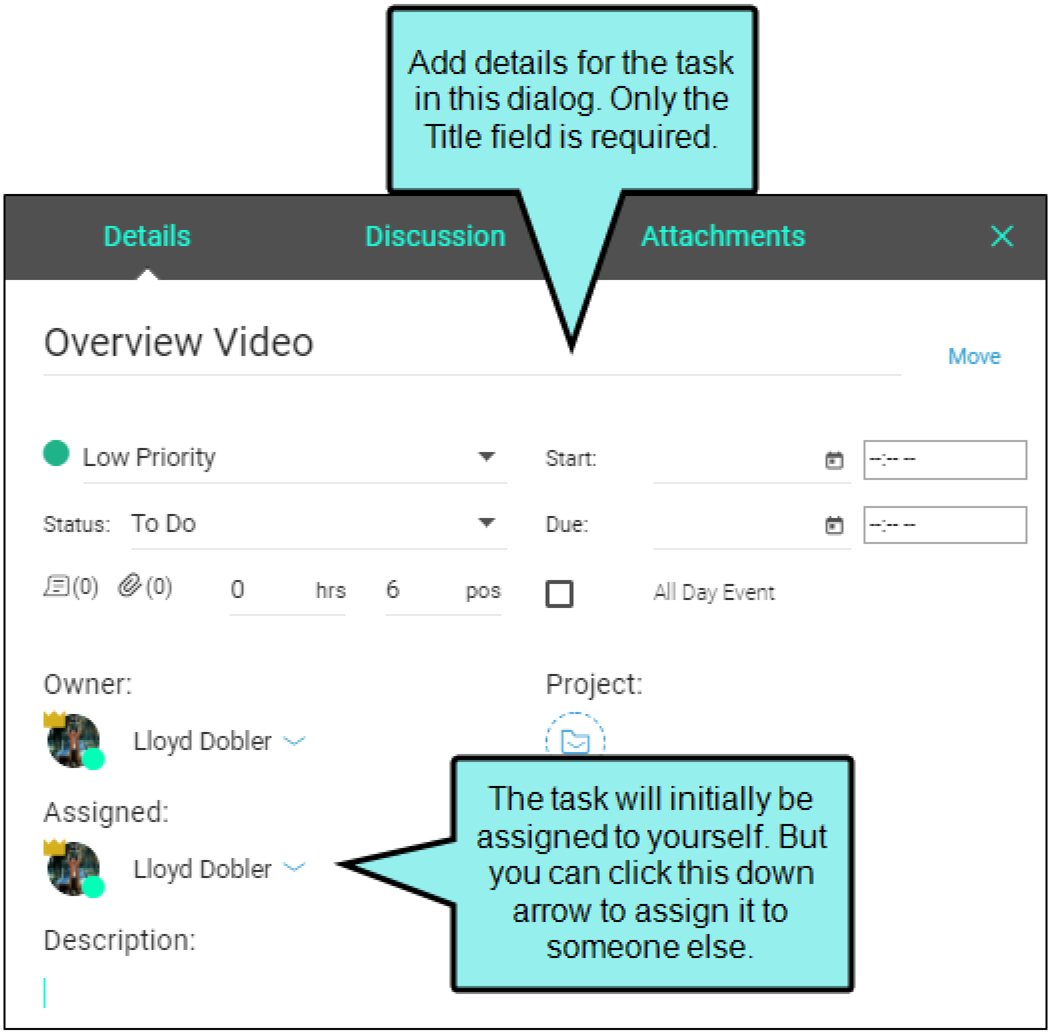
- Cloud Review SMEs do not need to download and install any software. The review takes place in the cloud.
- Multi-User Editing Multiple SMEs and authors can make changes and add comments to the same topic or snippet at the same time.
- Review-Only Interface A lightweight version of the editor means 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.

CHAPTER 9

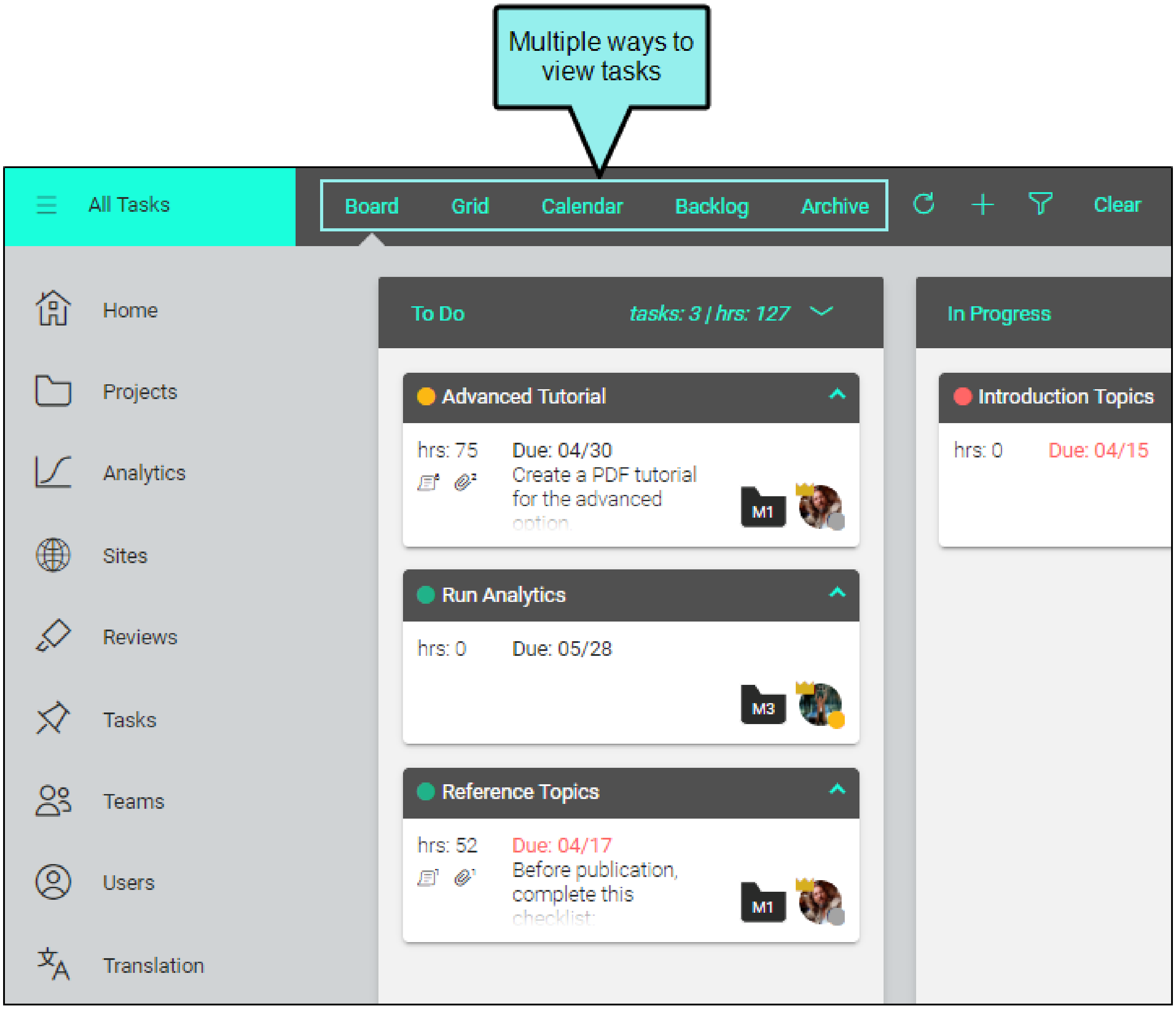
Tasks

The Tasks page lets you keep track of work that needs to be completed and visualize the work flow. When creating a task, you can provide various kinds of information for it.




Add details for the task in this dialog. Only the Title field is required.
Details
Discussion
Attachments
Overview Video
Move
Low Priority
Start:
Status: To Do
Due:
(0)
(0)
0
hrs
6
pos
All Day Event
Owner:
Project:
Lloyd Dobler
Assigned:
Lloyd Dobler
Description:
The task will initially be assigned to yourself. But you can click this down arrow to assign it to someone else.

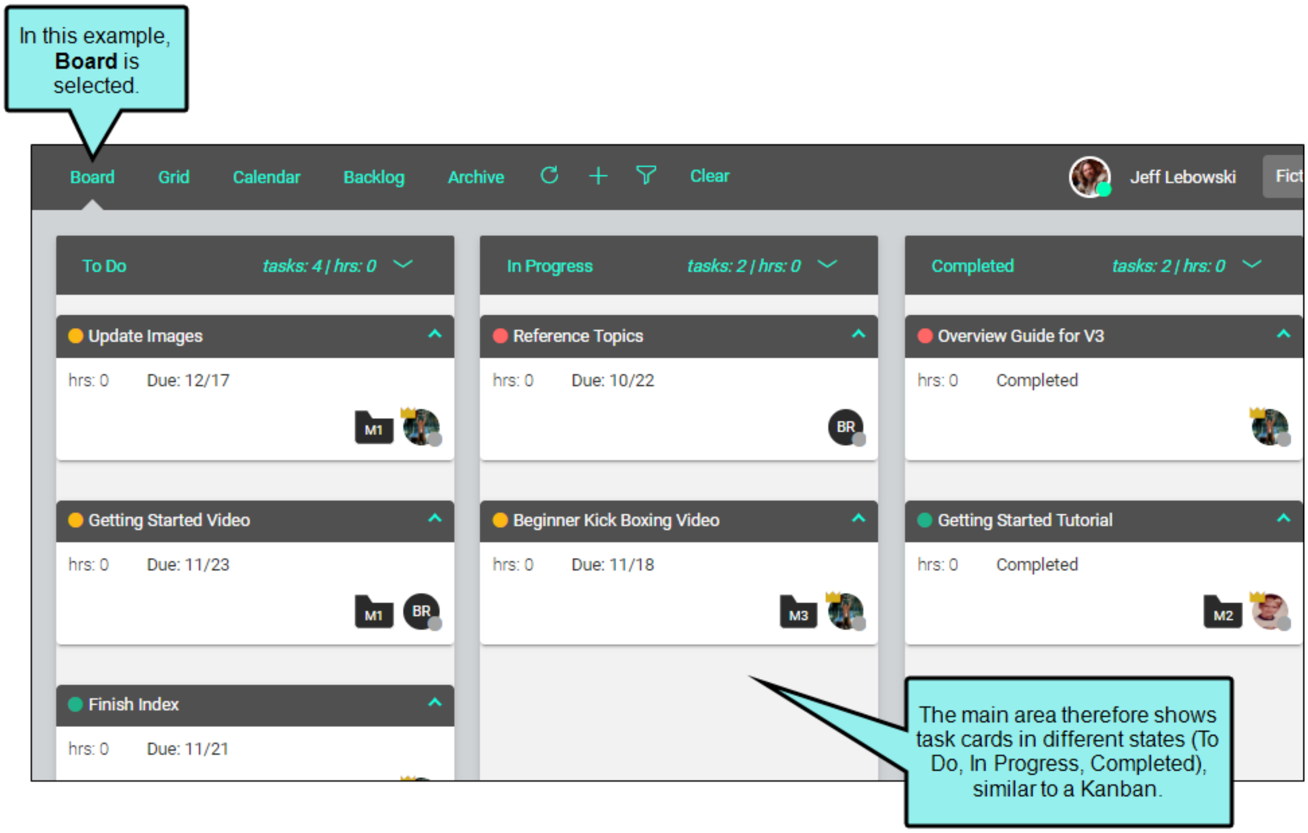
Tabs at the top of the page let you see tasks in multiple views.



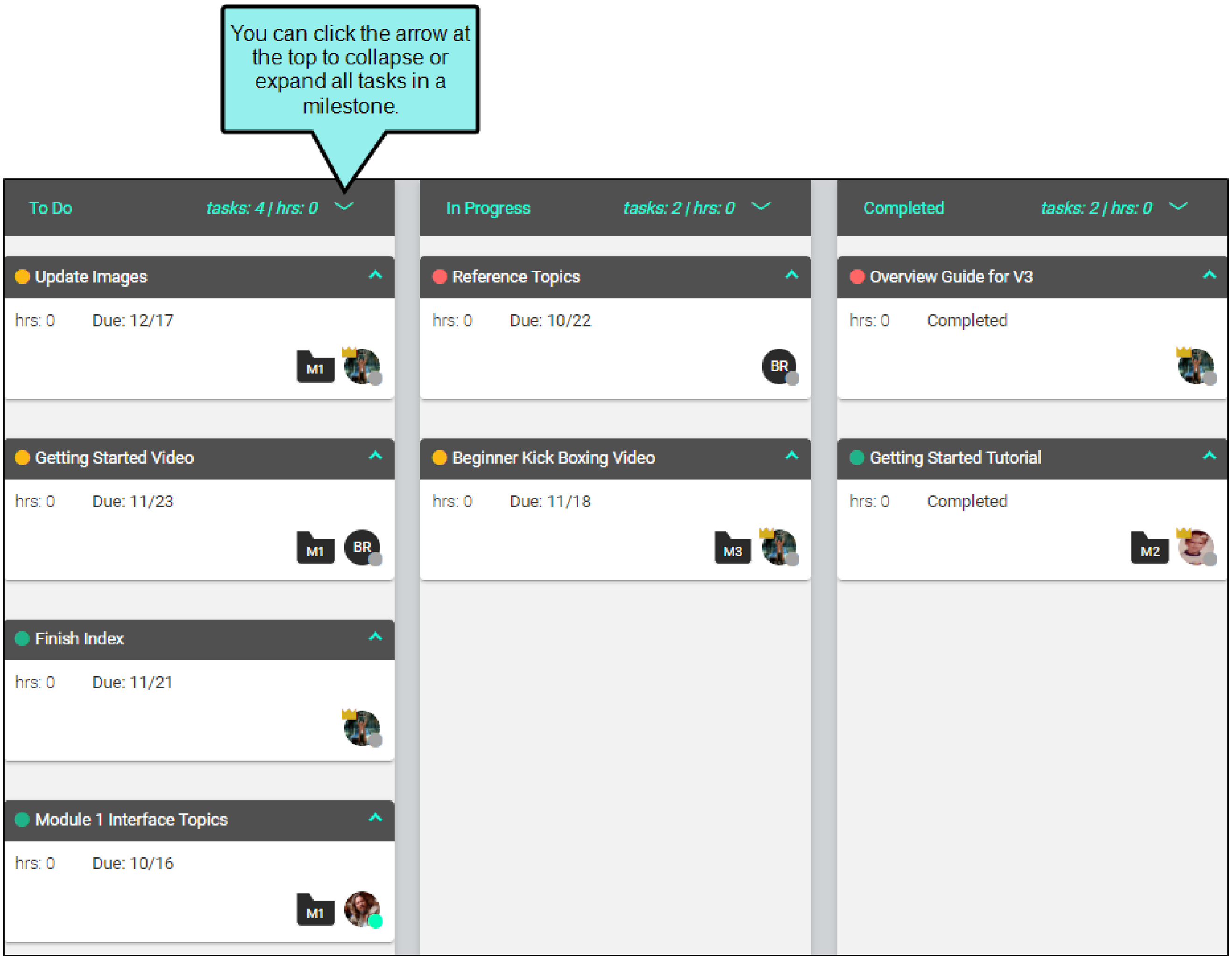
This chapter discusses the following:

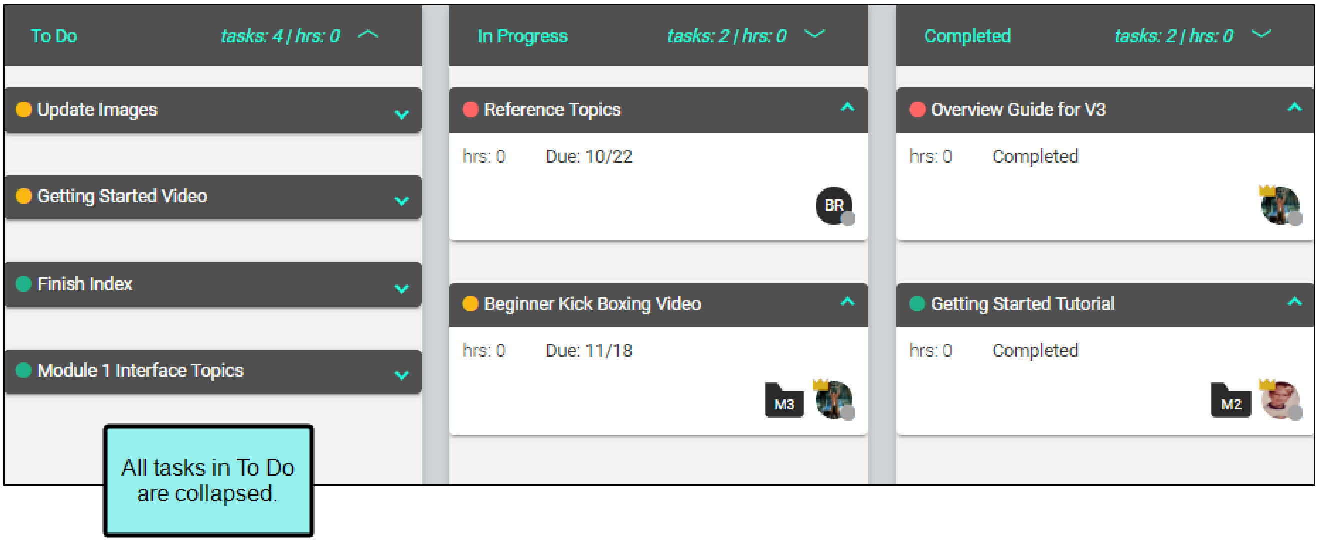
Board

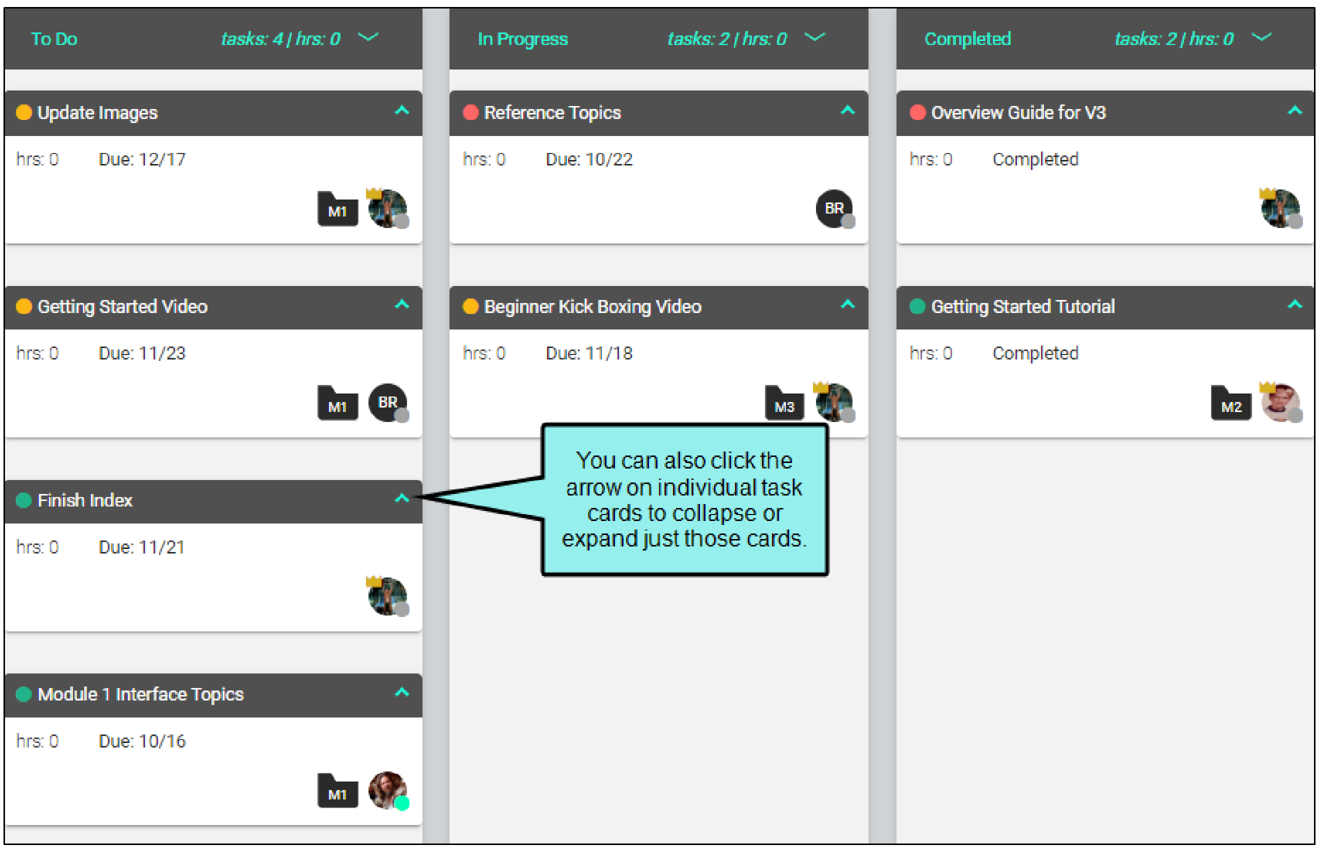
The Board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to a specific task.

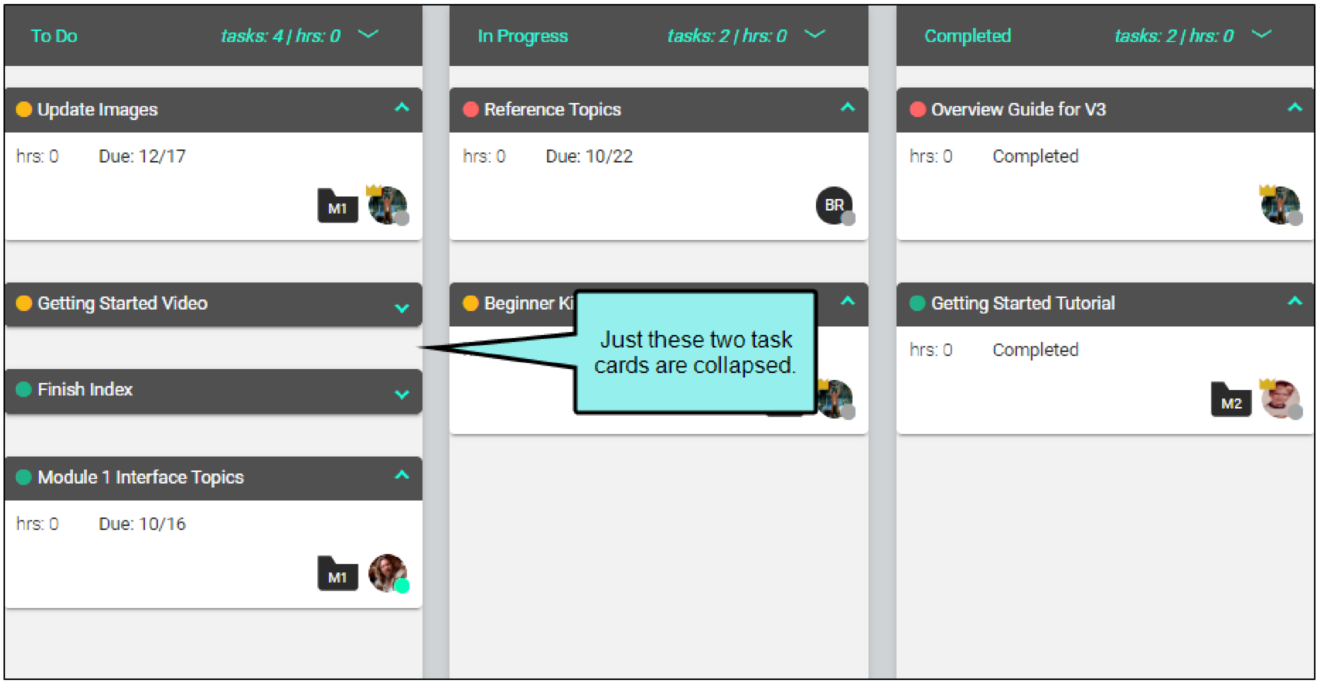


You can collapse and expand any or all cards. This lets you view more task cards on the screen.

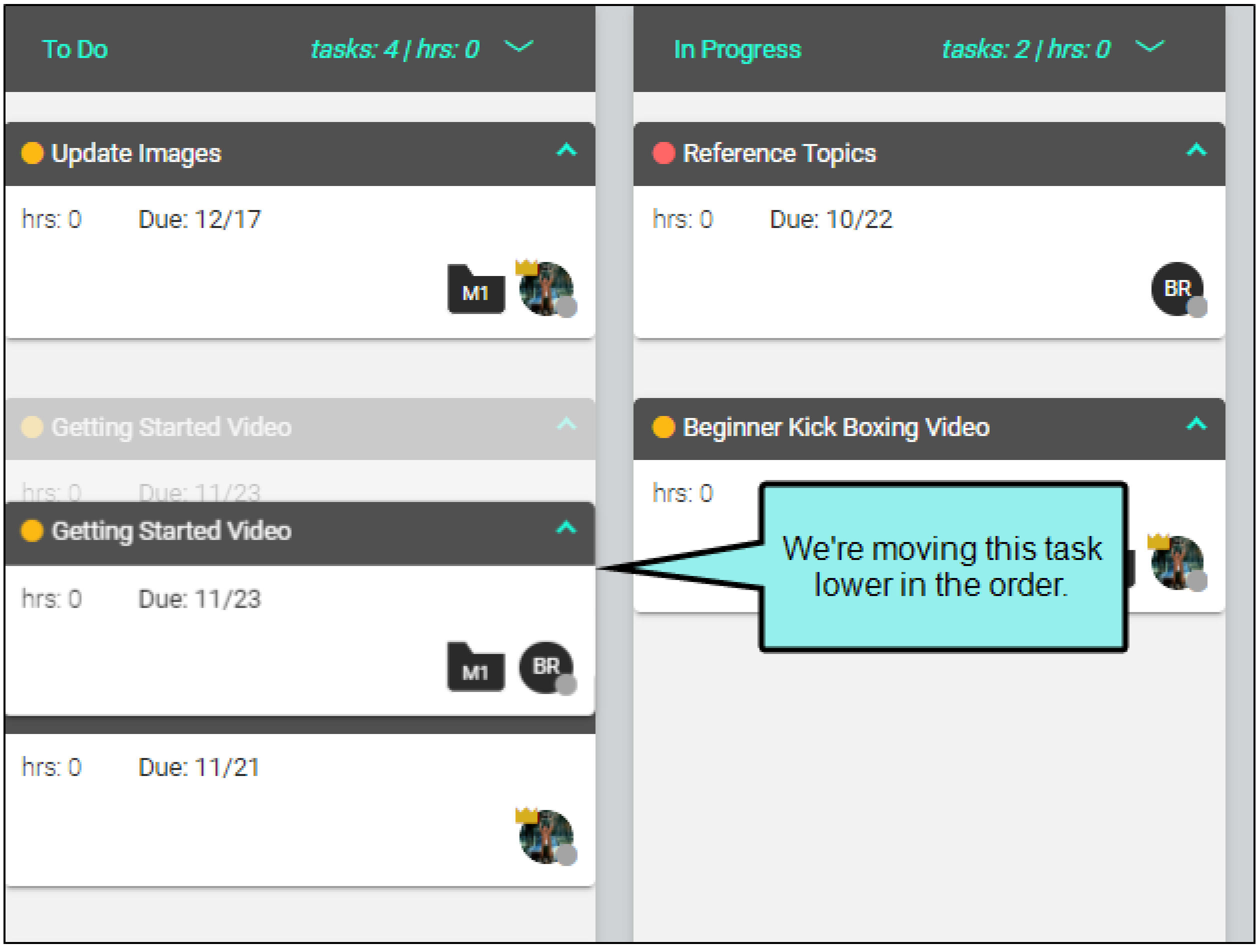


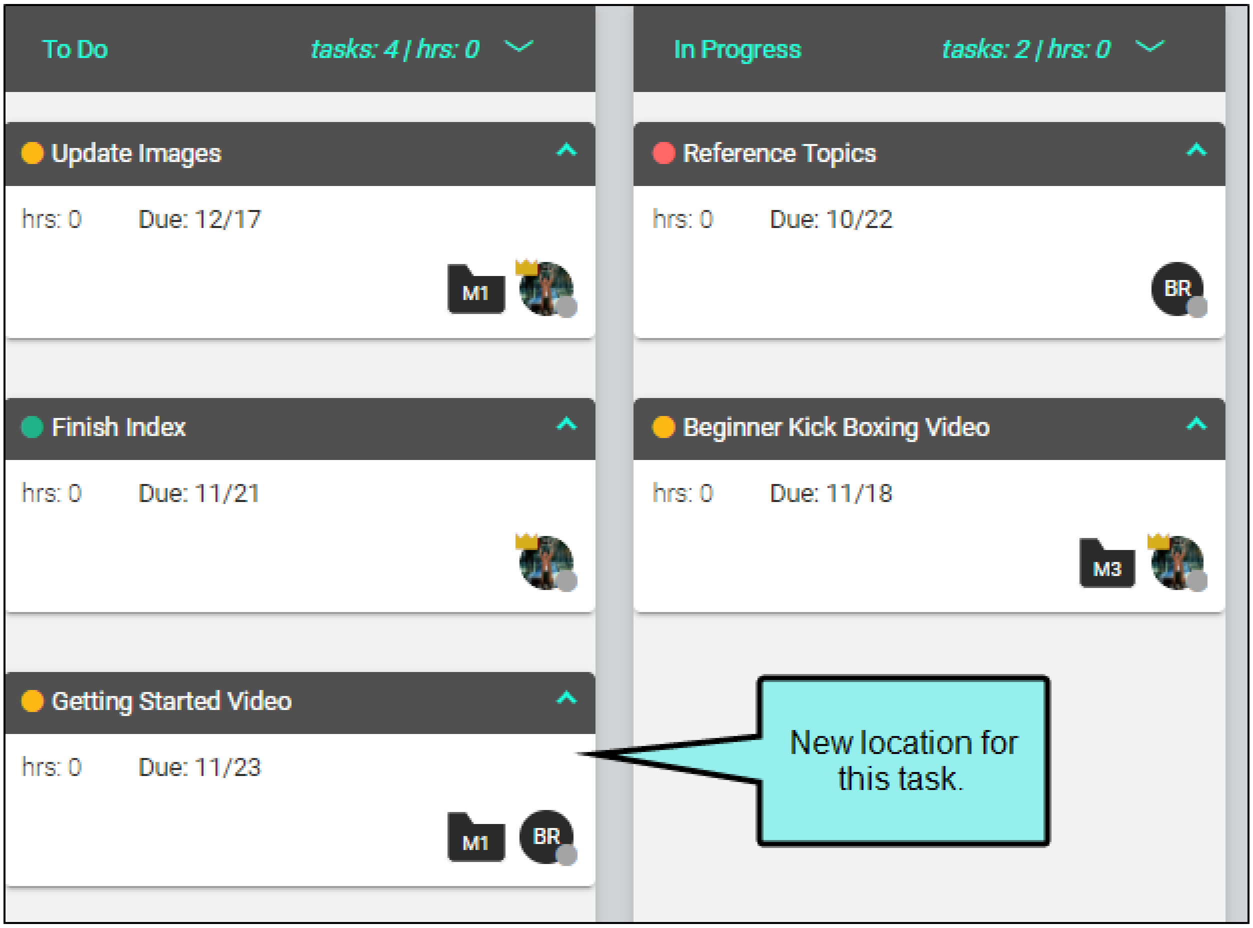

To Do
tasks: 4 | hrs: 0
In Progress
tasks: 2 | hrs: 0
Completed
tasks: 2 | hrs: 0
Update Images
Getting Started Video
Finish Index
Module 1 Interface Topics
Reference Topics
hrs: 0
Due: 10/22
BR
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
Overview Guide for V3
hrs: 0
Completed
Getting Started Tutorial
hrs: 0
Completed
M2
All tasks in To Do are collapsed.


To Do
tasks: 4 | hrs: 0
In Progress
tasks: 2 | hrs: 0
Completed
tasks: 2 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Getting Started Video
hrs: 0
Due: 11/23
M1
BR
Finish Index
hrs: 0
Due: 11/21
Module 1 Interface Topics
hrs: 0
Due: 10/16
M1
Reference Topics
hrs: 0
Due: 10/22
BR
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
Overview Guide for V3
hrs: 0
Completed
Getting Started Tutorial
hrs: 0
Completed
M2
You can also click the arrow on individual task cards to collapse or expand just those cards.


To Do
tasks: 4 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Getting Started Video
Finish Index
Module 1 Interface Topics
hrs: 0
Due: 10/16
M1
In Progress
tasks: 2 | hrs: 0
Reference Topics
hrs: 0
Due: 10/22
BR
Just these two task cards are collapsed.
Completed
tasks: 2 | hrs: 0
Overview Guide for V3
hrs: 0
Completed
Getting Started Tutorial
hrs: 0
Completed
M2

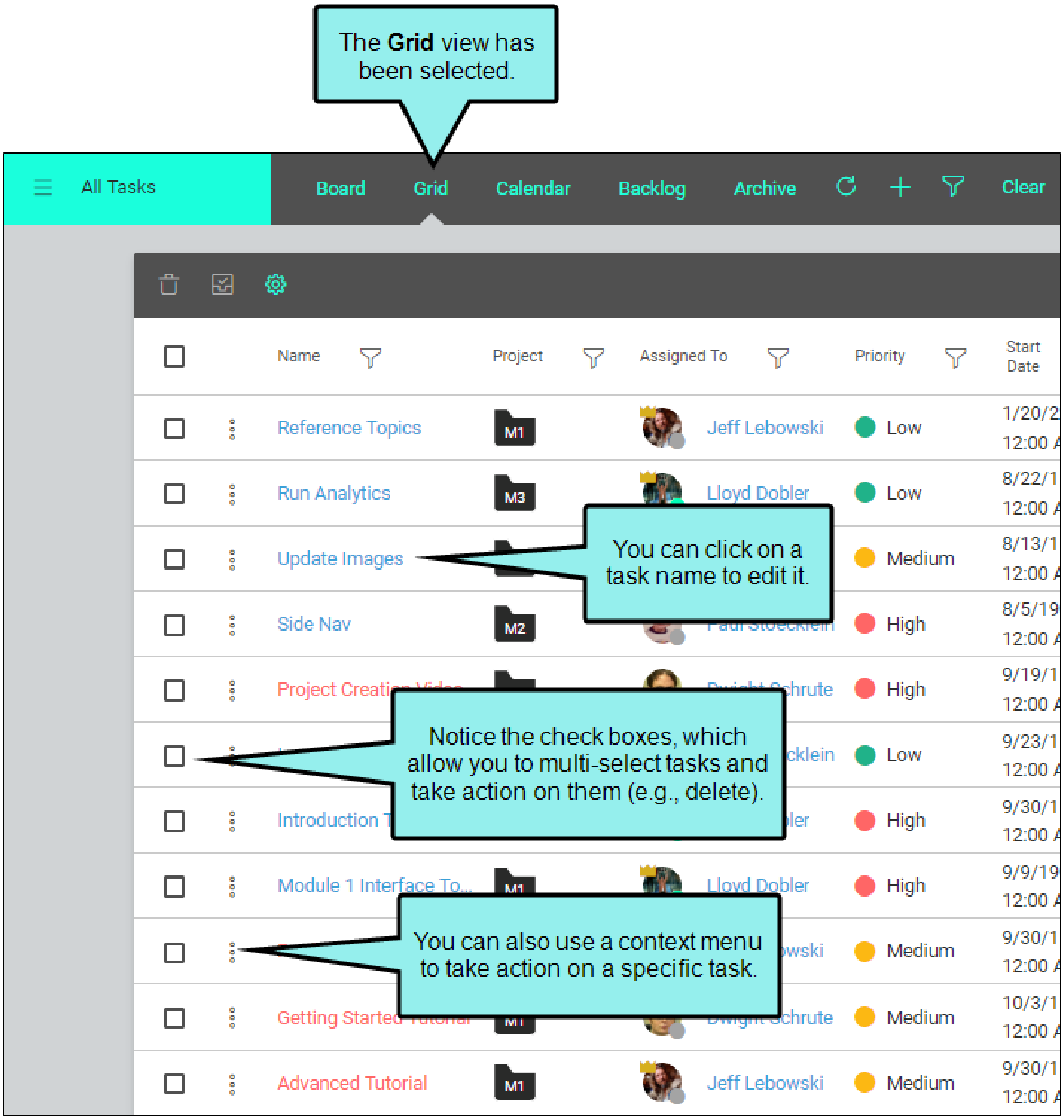
Also, you can customize the order of the tasks within a milestone column by dragging and dropping the cards.




To Do
tasks: 4 | hrs: 0
Update Images
hrs: 0
Due: 12/17
M1
Finish Index
hrs: 0
Due: 11/21
Getting Started Video
hrs: 0
Due: 11/23
M1
BR
In Progress
tasks: 2 | hrs: 0
Reference Topics
hrs: 0
Due: 10/22
BR
Beginner Kick Boxing Video
hrs: 0
Due: 11/18
M3
New location for this task.

Grid

The Grid view displays tasks in a row format. You can click a task name to edit it. Also, you can use the check boxes to select one or more rows in order to take an action on all those tasks at once, such as moving them to another milestone or deleting them.

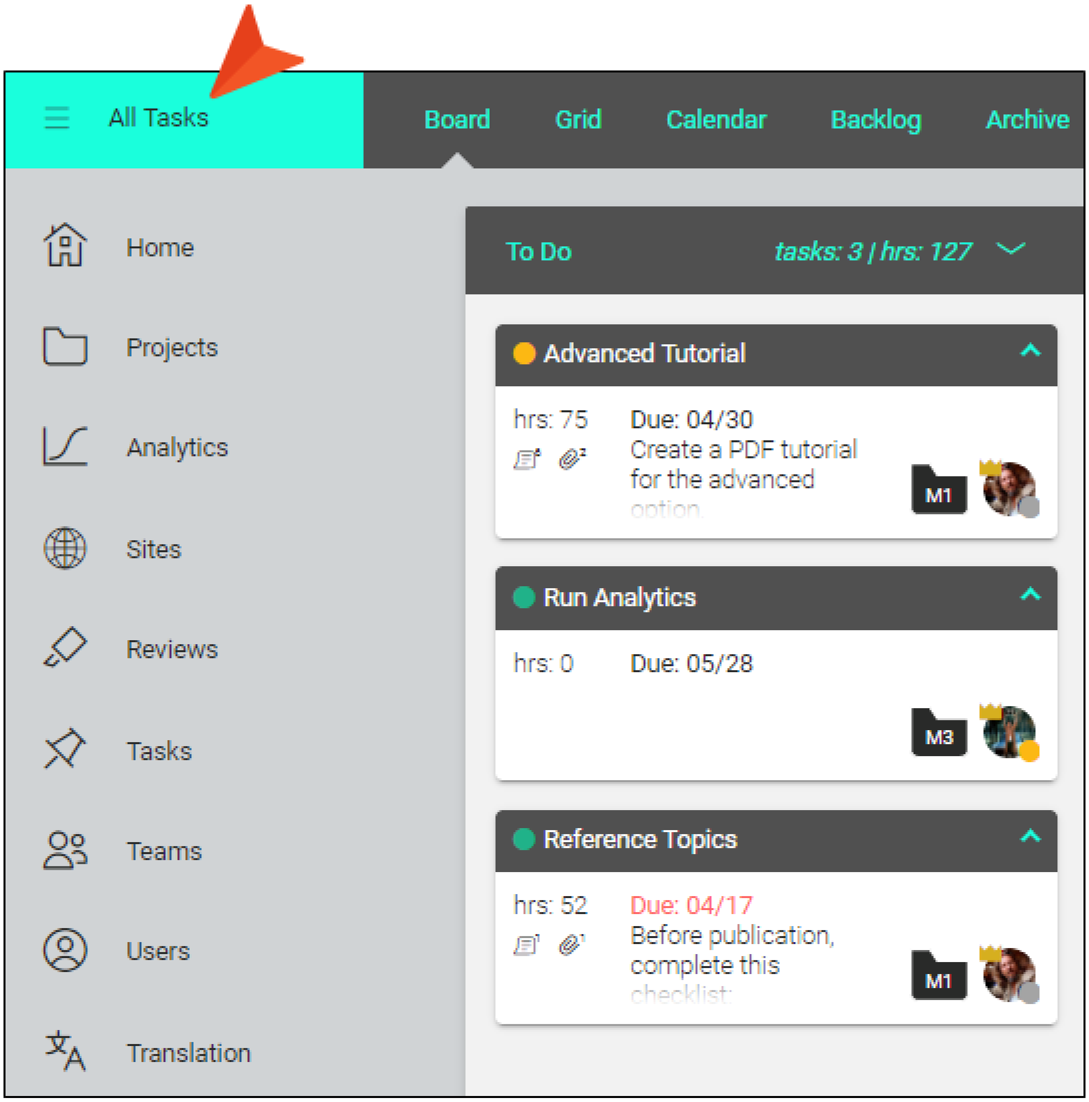


Calendar

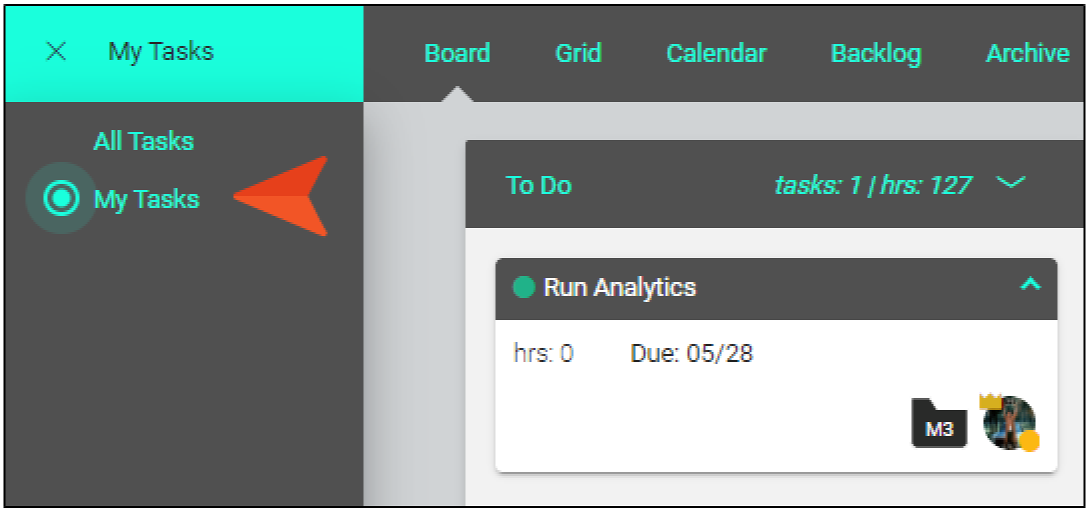
The Calendar view displays tasks in a calendar format for the day, week, and month, with task cards listed to the left. Tasks in all milestones—including the Backlog and Archive—are included. However, only tasks that contain dates are displayed in the Calendar view. Small, color-coded circles represent tasks and their priority levels. Hovering over a circle lets you see the name of a task, and clicking the circle opens the task so you can edit it.

Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and other filters work in any of the Task page views, but can be especially useful in the Calendar view.

To use the "All Tasks/My Tasks" filter, click the upper-left corner of the interface, which by default, should initially say **All Tasks**.

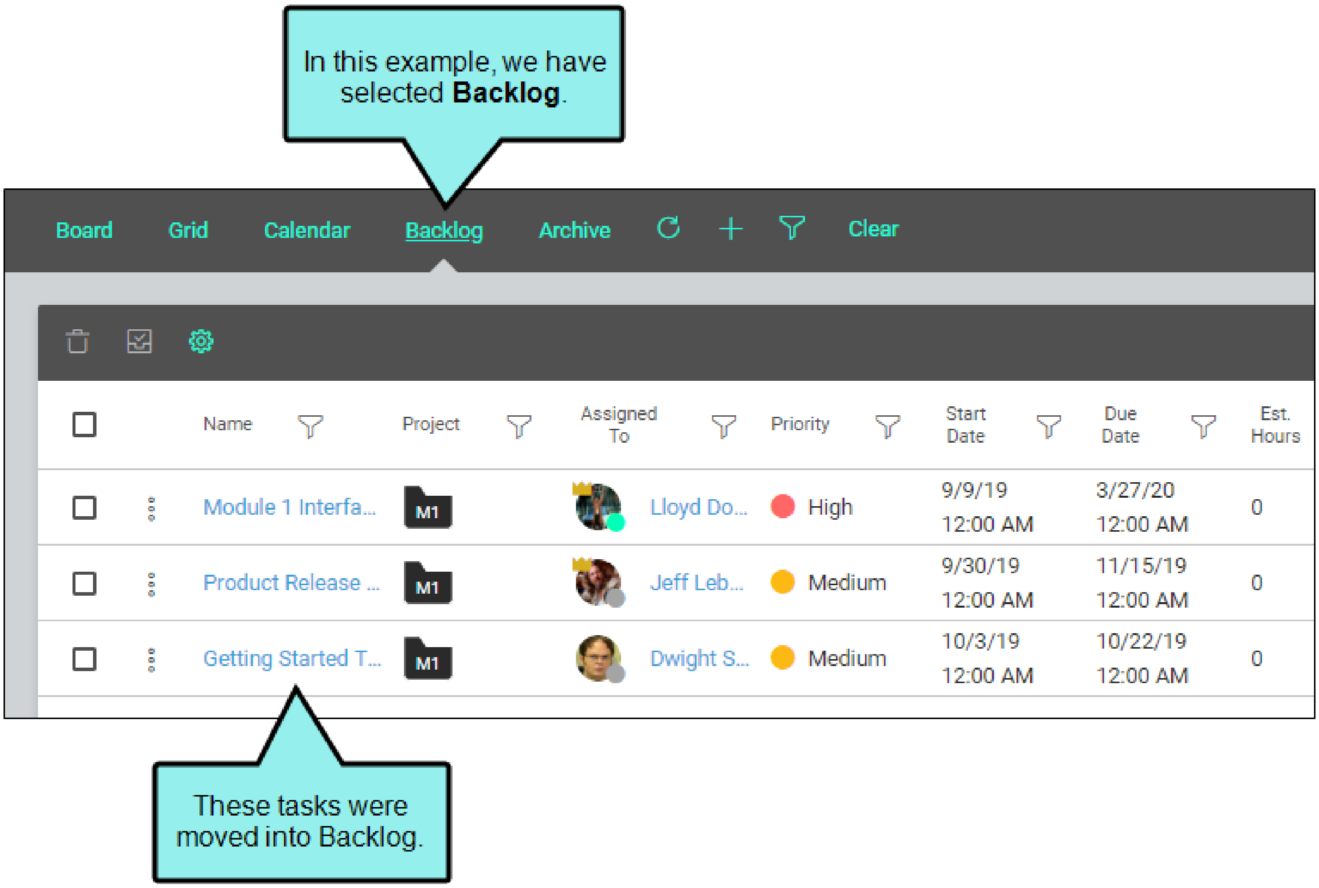


Then, in the flyout menu, you can select **My Tasks**.



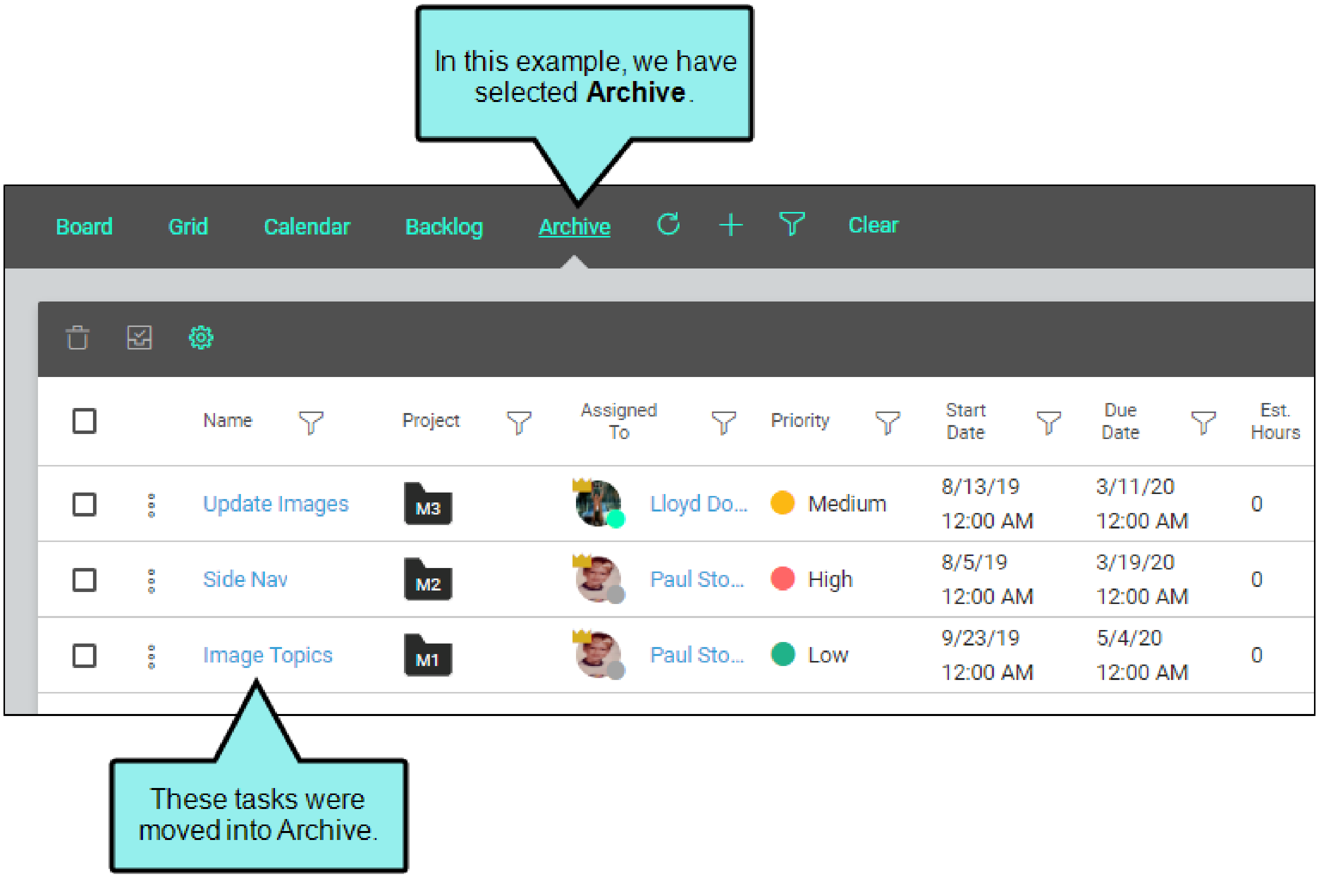
Backlog

The Backlog view displays tasks that are not yet complete and need to be removed from the work flow. The idea is that backlogged tasks will be revisited in the future so that they can be completed.



Archive

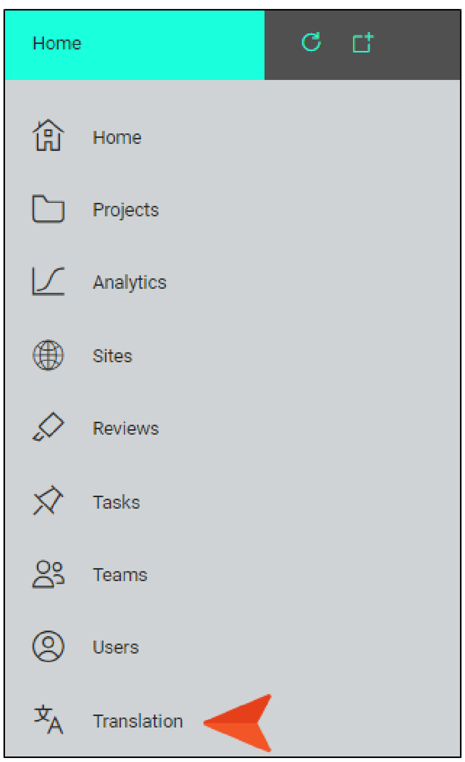
The Archive view displays tasks that have been finished and moved out of the current workflow. It is sort of like putting boxes of old documents into the attic; you want them out of the way but can retrieve them later if necessary.

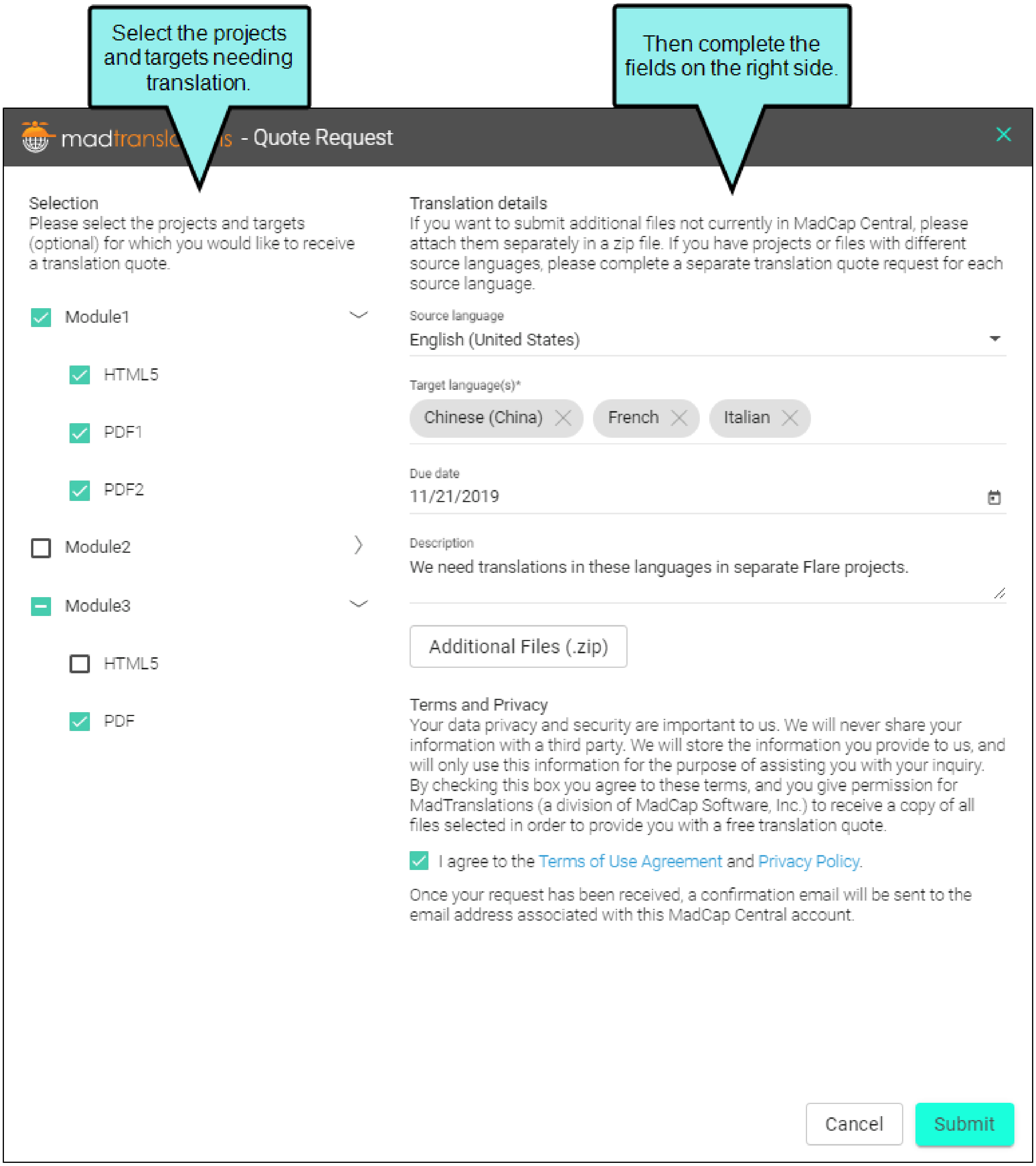


CHAPTER 10

Translation

The Translation option lets you request a quote for translating your Flare projects and other files. This quote originates from MadTranslations, which is the translation services division of MadCap Software. Select **Translation** on the left side of Central, choose your Flare projects and targets, complete the fields on the right side, and click **Submit**. Within two business days you will receive a reply from MadTranslations.



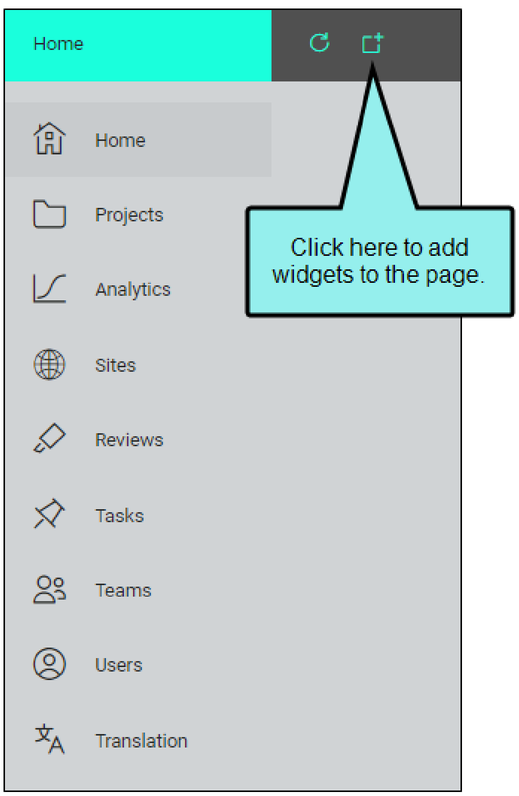

Select the projects and targets needing translation.
Then complete the fields on the right side.
- Quote Request
Selection
Please select the projects and targets (optional) for which you would like to receive a translation quote.
Module1
HTML5
PDF1
PDF2
Module2
Module3
HTML5
PDF
Translation details
If you want to submit additional files not currently in MadCap Central, please attach them separately in a zip file. If you have projects or files with different source languages, please complete a separate translation quote request for each source language.
Source language
English (United States)
Target language(s)*
Chinese (China)
French
Italian
Due date
11/21/2019
Description
We need translations in these languages in separate Flare projects.
Additional Files (.zip)
Terms and Privacy
Your data privacy and security are important to us. We will never share your information with a third party. We will store the information you provide to us, and will only use this information for the purpose of assisting you with your inquiry. By checking this box you agree to these terms, and you give permission for MadTranslations (a division of MadCap Software, Inc.) to receive a copy of all files selected in order to provide you with a free translation quote.
I agree to the Terms of Use Agreement and Privacy Policy.
Once your request has been received, a confirmation email will be sent to the email address associated with this MadCap Central account.
Cancel
Submit

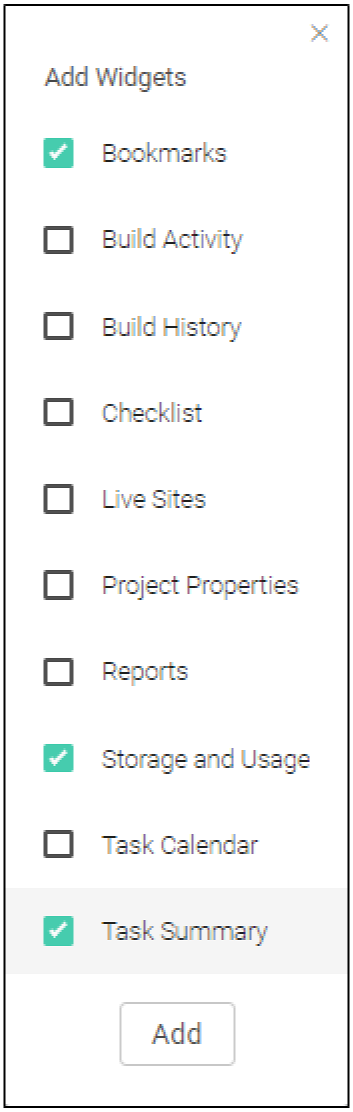
CHAPTER 11

Widgets

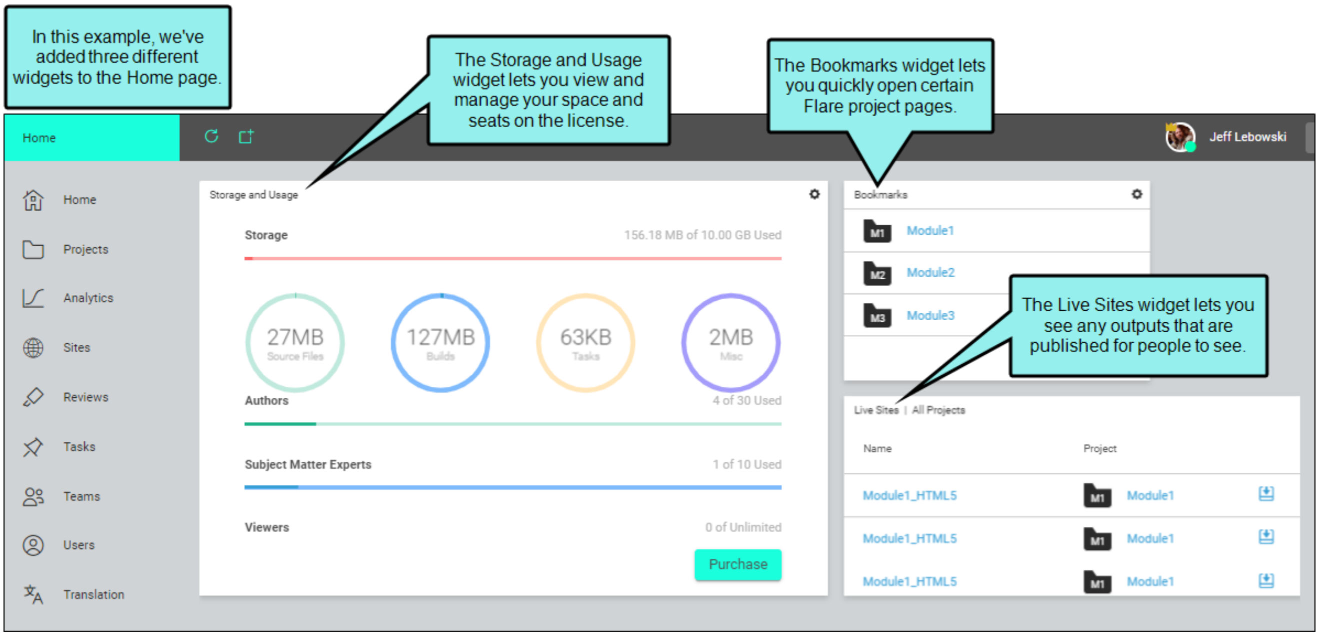
Widgets are standalone information objects that let you see data at a glance and provide quick access to certain areas. You can add widgets for all kinds of information on your Central license.

As information is added to your system, you will probably find it useful to add widgets to your Home dashboard, as well as to individual Project dashboards. Users can customize their own dashboards to meet individual preferences and work habits.



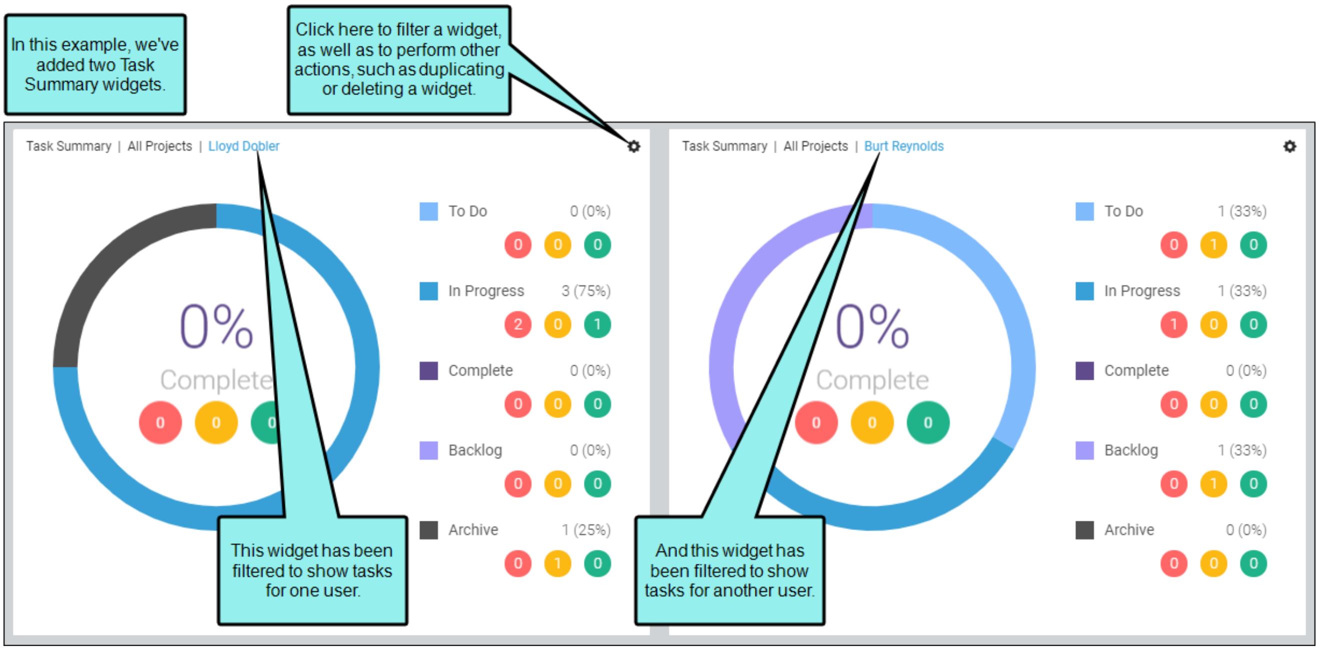

Add Widgets
Bookmarks
Build Activity
Build History
Checklist
Live Sites
Project Properties
Reports
Storage and Usage
Task Calendar
Task Summary
Add

You can click and drag widgets to resize them as you like on your dashboard.



If the screen width is reduced enough, the widgets are reconfigured to stack on top of one another, making them easier to see.

Keep in mind that you can add the same kind of widget multiple times to your dashboard. For example, if you are a documentation manager, you might want to add a Task Summary widget and filter it to show only your tasks. But you then might want to also add a separate Task Summary widget for each of your writers to see the tasks assigned to each of them.



APPENDIX

PDFs

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

Getting Started Guide

Projects and Builds Guide

Security Whitepaper

Server Management and Purchasing Guide

Sites Guide

Tasks Guide

Users and Teams Guide

Widgets Guide