



USER GUIDE



MADCAP CENTRAL

Getting Started Guide

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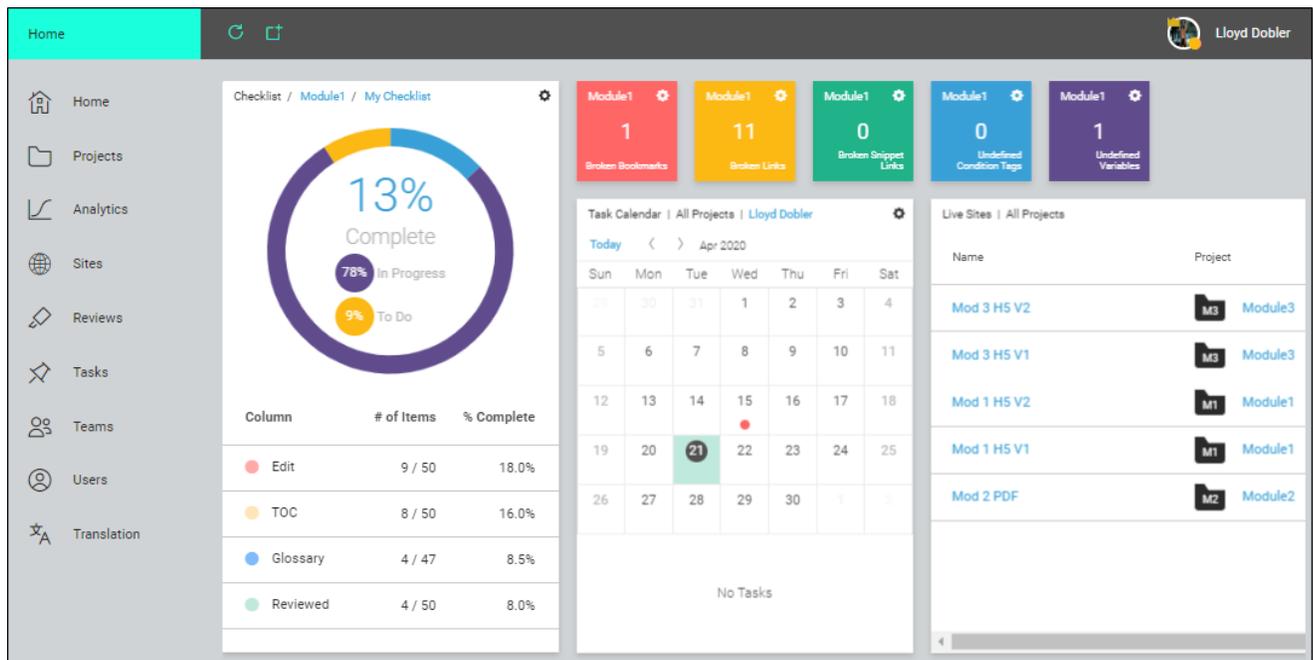
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CHAPTER 1

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.



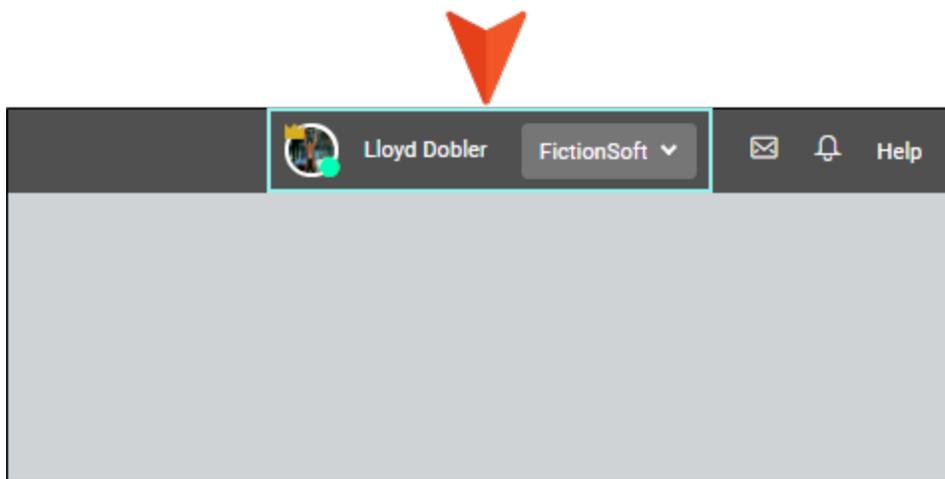
This guide discusses the following:

- **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.

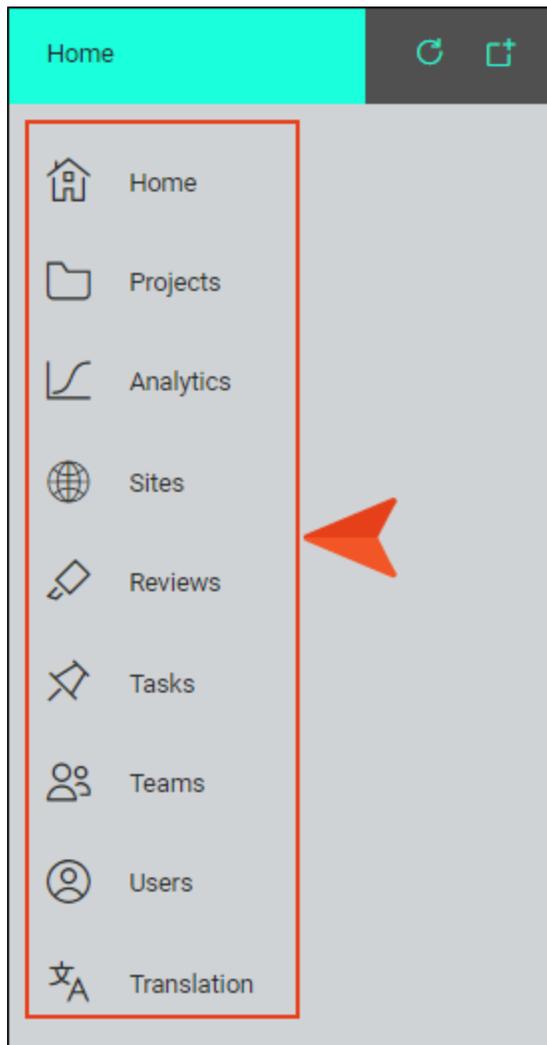
CHAPTER 2

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.



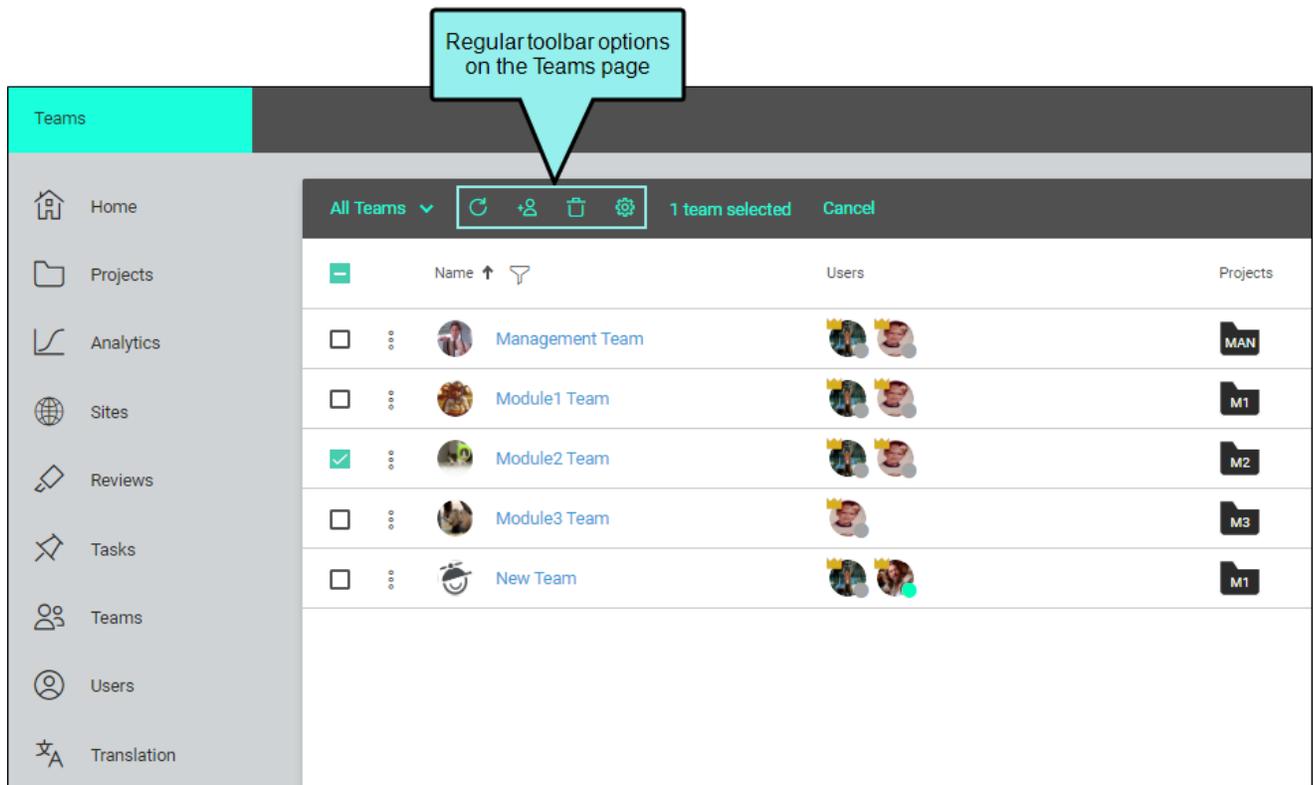
On the left side is a series of icons that open the different pages and dashboards where you will work. In order, these are: Home, Projects, Tasks, Reviews, Teams, Users, and Translation.



 **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).

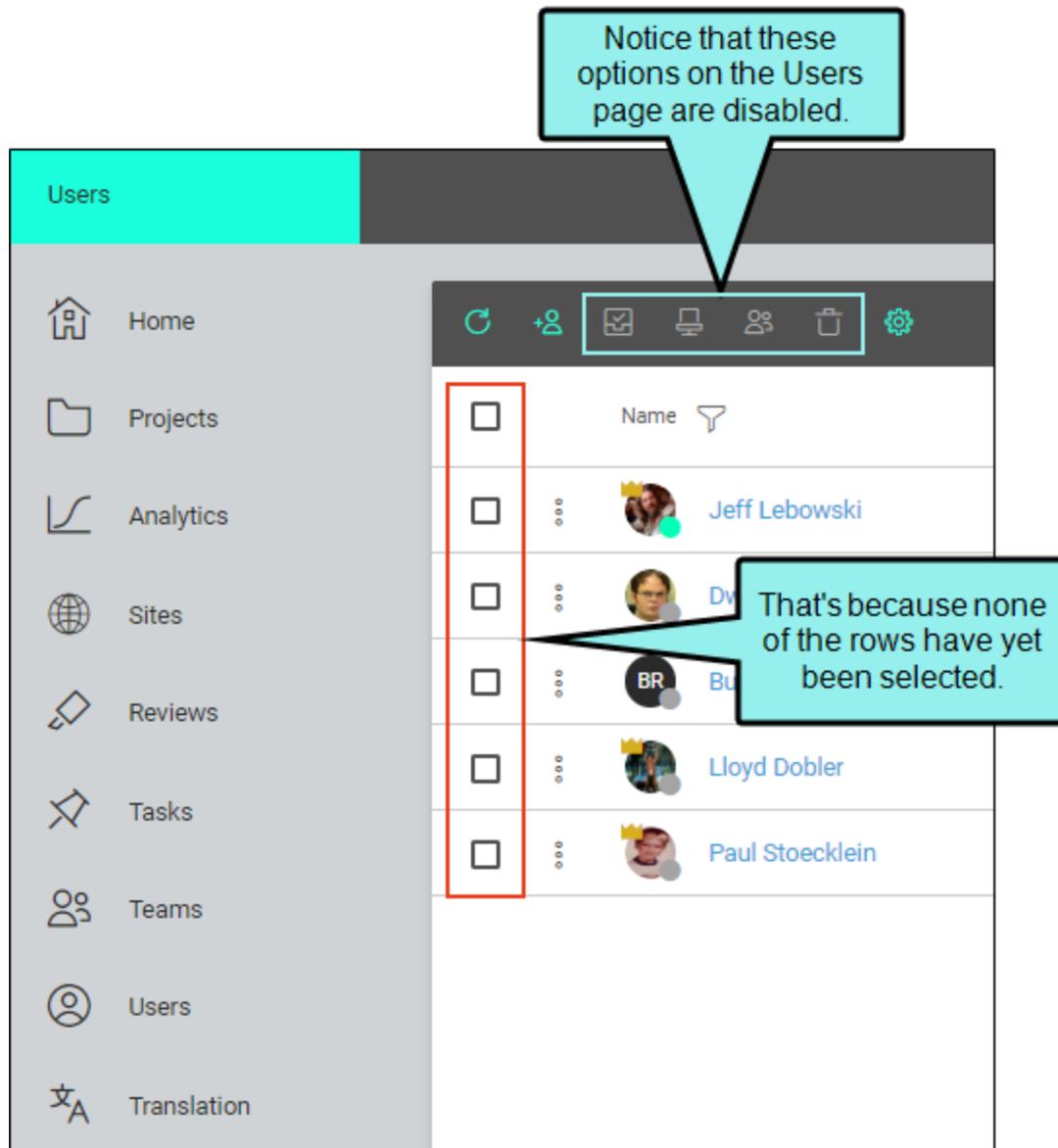


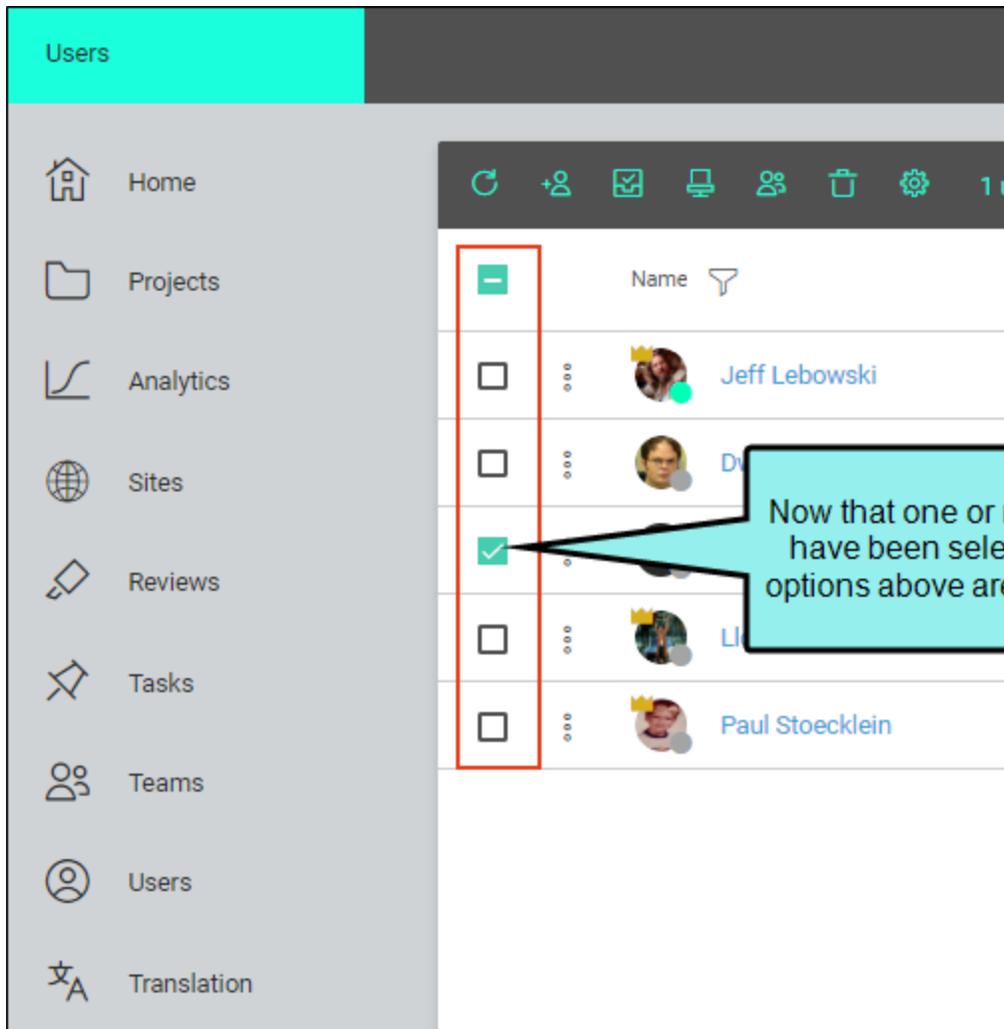
Sub-page (or view) options on the Tasks page

Regular toolbar options on the Tasks page

The screenshot displays a task management application interface. On the left is a sidebar with navigation options: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, and Translation. The top navigation bar includes a menu icon, 'All Tasks', and view options: Board, Grid, Calendar, Backlog, and Archive. To the right of the view options is a toolbar with icons for refresh, add, filter, and a 'Clear' button. The main content area is divided into two columns: 'To Do' and 'In Progress'. The 'To Do' column contains three task cards: 'Advanced Tutorial' (75 hrs, due 04/30), 'Run Analytics' (0 hrs, due 05/28), and 'Reference Topics' (52 hrs, due 04/17). The 'In Progress' column contains one task card: 'Introduction Topics' (0 hrs, due 04/15). Each task card includes a title, duration, due date, description, and a small team icon.

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

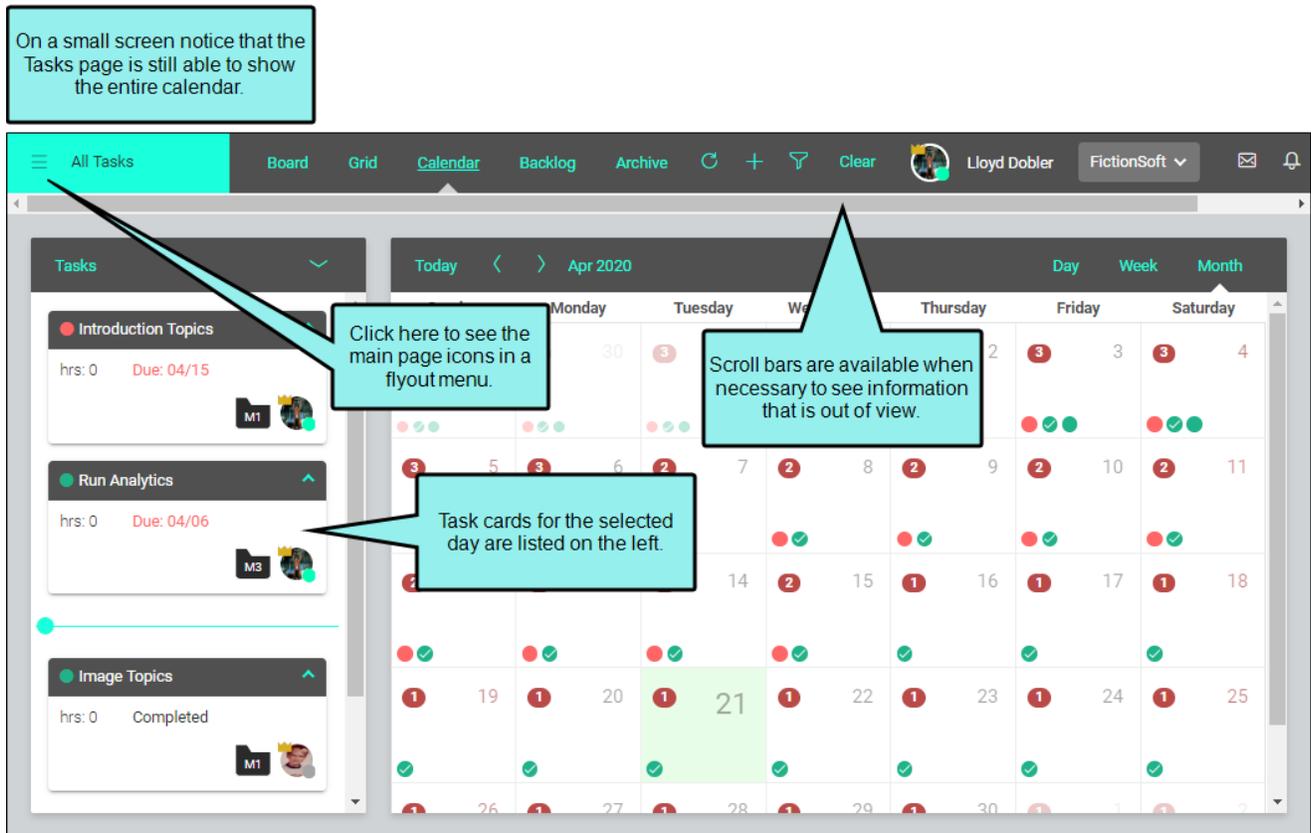




Responsive Interface

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.



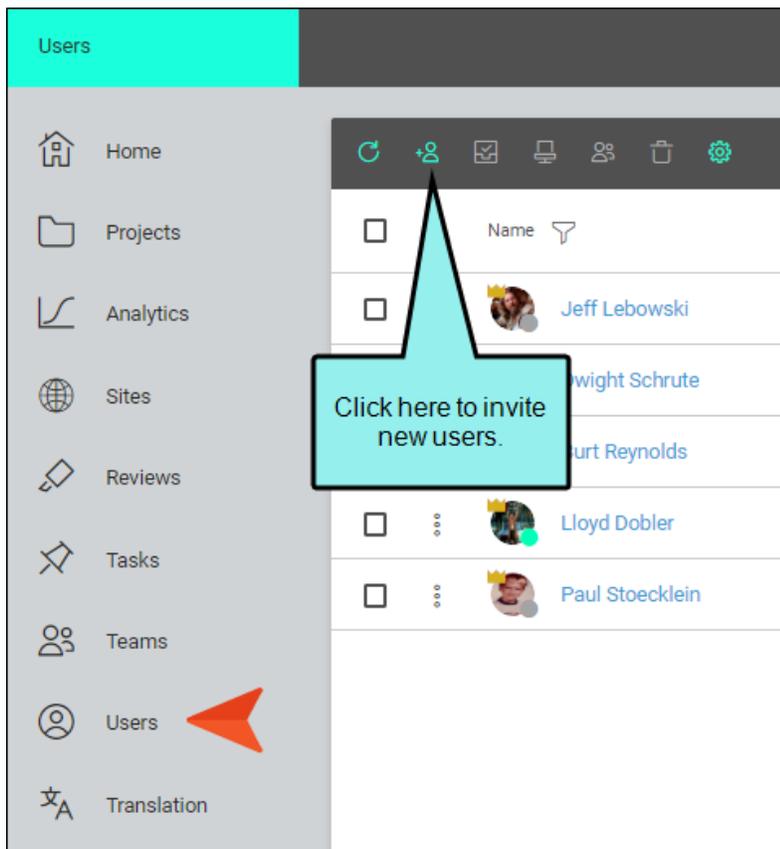
The screenshot shows a software interface with a top navigation bar containing 'All Tasks', 'Board', 'Grid', 'Calendar', 'Backlog', 'Archive', and 'Clear'. A user profile for 'Lloyd Dobler' and a dropdown menu for 'FictionSoft' are also visible. On the left, a dark flyout menu lists various sections: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, Translation, Activity, What's New!, All Tasks, and My Tasks. The main area displays a calendar for April 2020, with the 21st highlighted. Three callout boxes provide instructions:

- Callout 1:** From the flyout menu, you can open any of the other main pages.
- Callout 2:** You can also access the activity feed and system messages, which are normally shown in an area on the right for larger screens.
- Callout 3:** 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.

User **Permissions** ✕

First Name *
Dwight

Last Name *
Schrute

Email *
dschrute@ficionsoft.com

User Role *

- Author
- Subject Matter Expert
- Viewer

[Bulk Invite](#)

[Download Template](#)

 **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.

The screenshot shows a user invitation form with the following elements:

- Callout 1:** A light blue speech bubble pointing to the top three input fields: "First Name *", "Last Name *", and "Email *". The text inside says: "Complete these fields to invite a single user."
- Form Fields:** Three text input fields for "First Name *", "Last Name *", and "Email *".
- User Seat Type *:** A dropdown menu currently showing "Author".
- Teams:** A dropdown menu.
- Buttons:** A "Bulk Invite" button with a question mark icon, a "Download Template" link, a "Cancel" button, and a "Send Invitation" button (which is currently disabled).
- Callout 2:** A light blue speech bubble pointing to the "Bulk Invite" button. The text inside says: "Alternatively, you can click here to invite multiple users at once."
- Callout 3:** A light blue speech bubble pointing to the "Download Template" link. The text inside says: "You can download a template and enter user information if you don't already have a CSV file."

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					

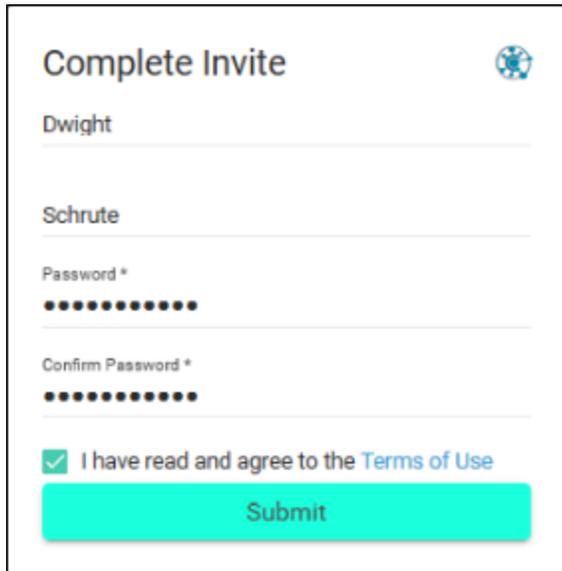
A person with “User Administration” rights can assign permissions to other users (Authors only, not SMEs or Viewers). Some users might receive only basic permissions, while others might be granted higher administrative rights.

Authors can be granted a variety of permissions in Central.

User Permissions

- Administrative**
 - Create/Edit Tasks
 - Delete Projects
 - Delete Teams
 - Delete Users
 - Manage Output Analytics Keys
 - Manage Sites
 - Manage Teams/Projects
 - Purchasing
 - Server Management
 - Slack Integration
 - User Administration
- Projects**
 - Import/Pull
 - Push
 - Upload New Projects
 - Builds**
 - Delete Builds
 - Manage Builds
 - Run/Schedule Builds
 - View/Download Builds

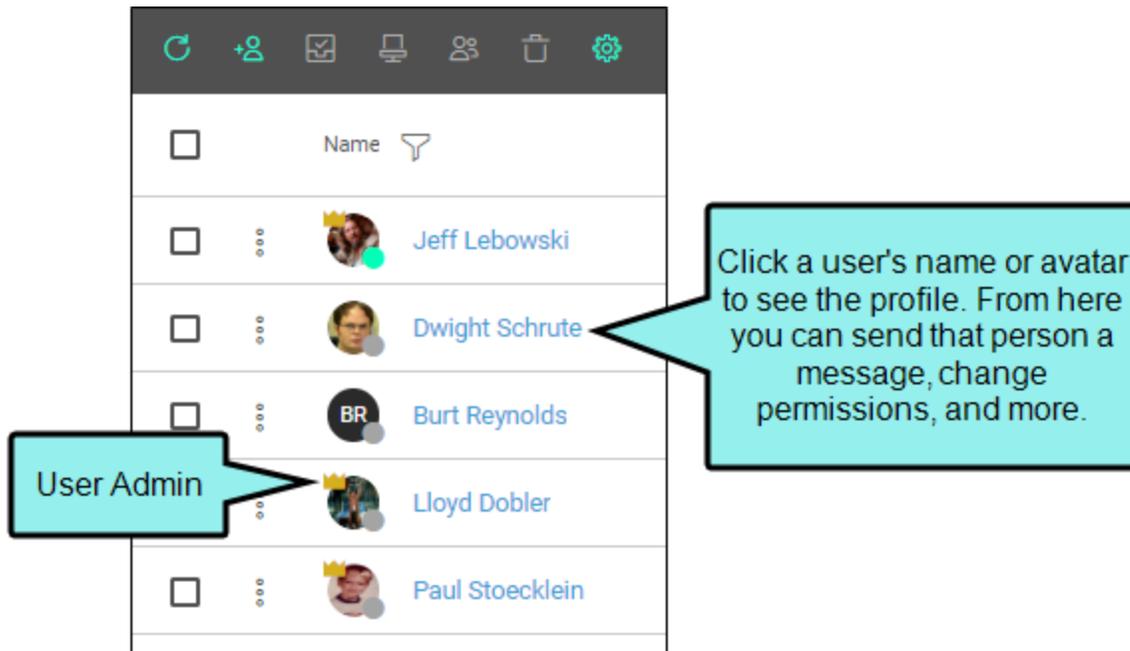
When a new user is invited, that person receives an email. The individual must click a link to complete the invitation to Central. This allows the user to confirm or edit his or her name, and set up a password. After the user submits the information, the account is activated.



The image shows a web form titled "Complete Invite" with a globe icon in the top right corner. The form contains the following fields and elements:

- A text input field containing the name "Dwight".
- A text input field containing the name "Schrute".
- A password input field labeled "Password *" with ten black dots representing the masked password.
- A confirm password input field labeled "Confirm Password *" with ten black dots representing the masked password.
- A checkbox that is checked, followed by the text "I have read and agree to the [Terms of Use](#)".
- A large red "Submit" button at the bottom.

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.

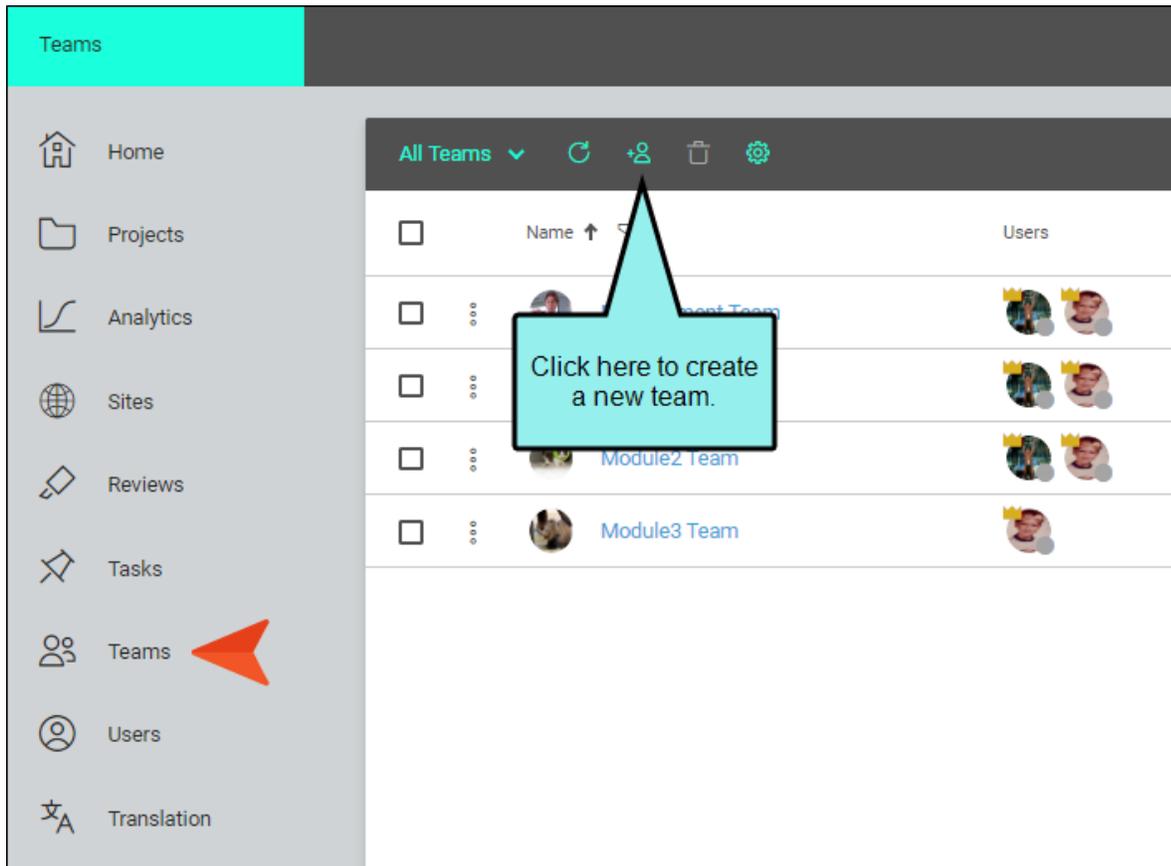


 **NOTE** The notifications feature—which can be seen after you click **Edit** in the Profile dialog—is available for Author user types only, not for SMEs or Viewers.

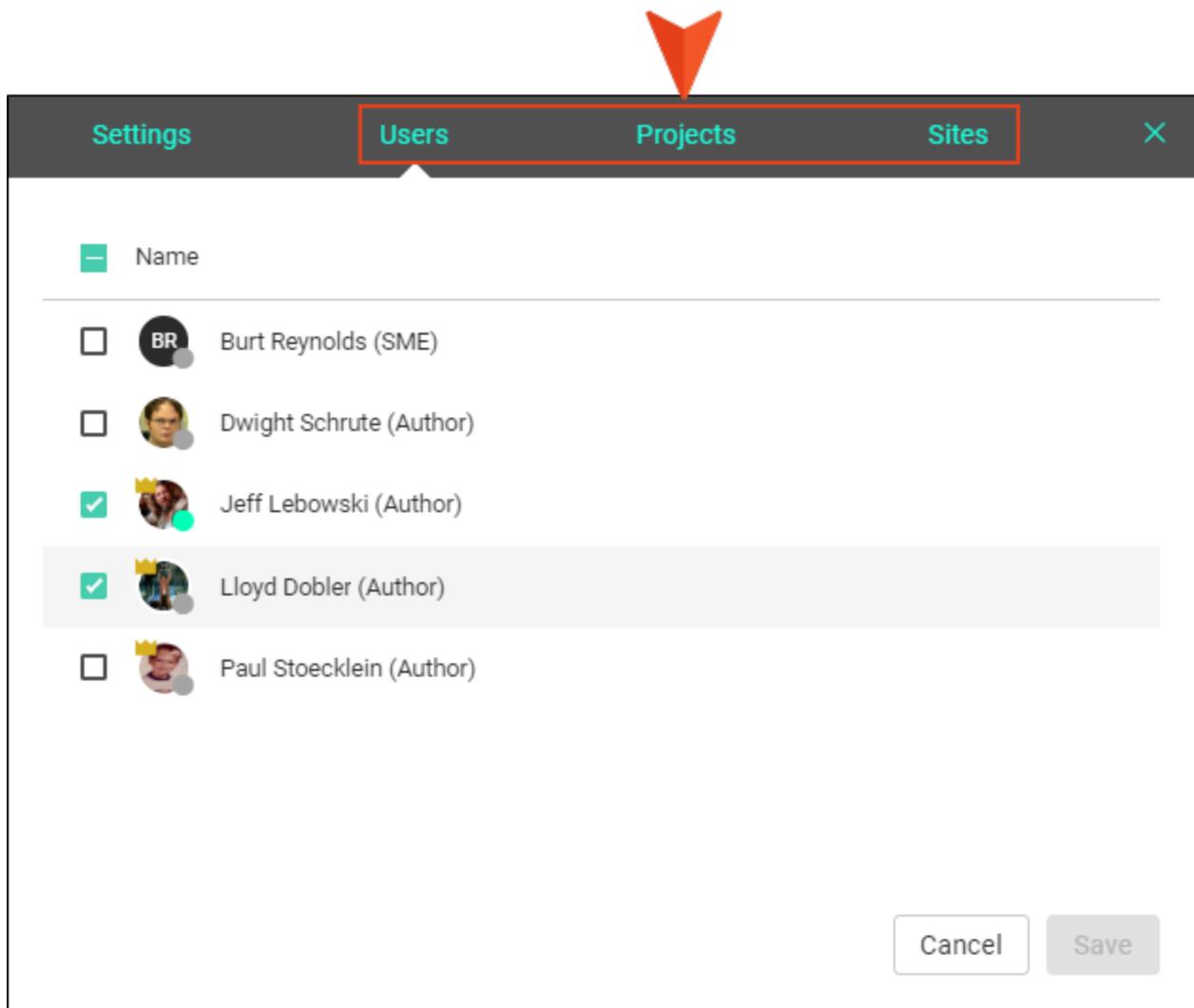
CHAPTER 4

Teams

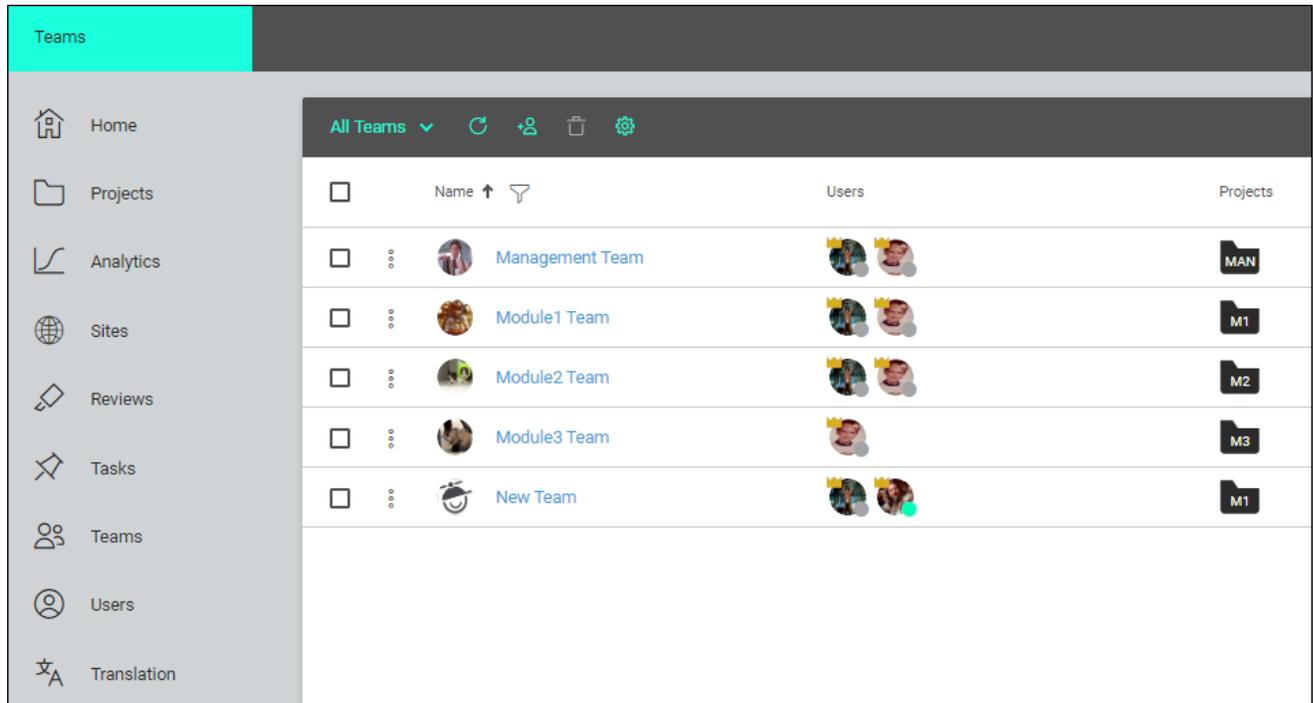
The Teams page can be used to organize users into groups. This provides a convenient way to associate authors with projects. Teams are also important if you produce private output, because only members of a team that is associated with the private site can view that output.



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.

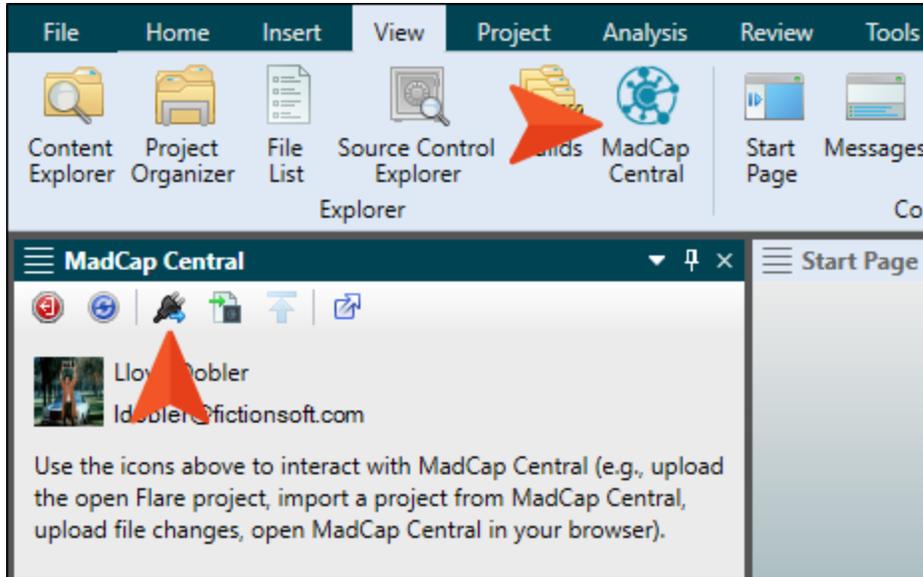
Name	Teams	Users	Status	Last Built
Management-Project			Active	
Module1			Active	Mar 16, 2020 7:14 AM
Module2			Active	Feb 19, 2020 8:26 AM
Module3			Active	
Module4			Active	Feb 19, 2020 8:16 AM
Module5			Active	

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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.

	Name	Seat Type	Status	Online
<input type="checkbox"/>	Jeff Lebowski	Author	Active	No
<input type="checkbox"/>	Dwight Schrute	Author	Active	No
<input type="checkbox"/>	Burt Reynolds	SME	Active	No
<input type="checkbox"/>	Lloyd Dobler	Author	Active	Yes
<input type="checkbox"/>	Paul Stoeklein	Author	Active	No

The screenshot shows a user profile for Lloyd Dobler. The left sidebar contains a navigation menu with the following items: Settings, Email & Password, **Teams & Projects** (highlighted), Assign New Task, Activity, Permissions, Notifications, Deactivate, and Delete. The main content area is titled 'Teams' and 'Projects' and contains a list of four teams: Management Team, Module1 Team, Module2 Team, and Module3 Team. An 'Edit' button is located in the top right corner. A callout box points to the 'Teams & Projects' menu item with the text: '2. If you have "Manage Teams and Projects" permission, click here.'

The screenshot shows a user profile for Lloyd Dobler. The profile includes a circular profile picture, the name "Lloyd Dobler", and contact information: "pstoecklein@gmail.com", "Documentation Manager | R&D", "La Jolla, CA", "(123) 456-7890", and "(123) 098-7654". A dark sidebar on the left contains a menu with items: Settings, Email & Password, Teams & Projects (highlighted with a right-pointing arrow), Assign New Task, Activity, Permissions, Notifications, Deactivate, and Delete. The main content area is titled "Teams" and "Projects" with a close button (X) in the top right. It lists four teams: Management Team, Module1 Team, Module2 Team, and Module3 Team. Each team has a small circular icon to its left. To the right of the "Management Team" entry, the word "Edit" is visible. A light blue callout box with a black border and a pointer to the "Edit" text contains the instruction "3. Click **Edit**."

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

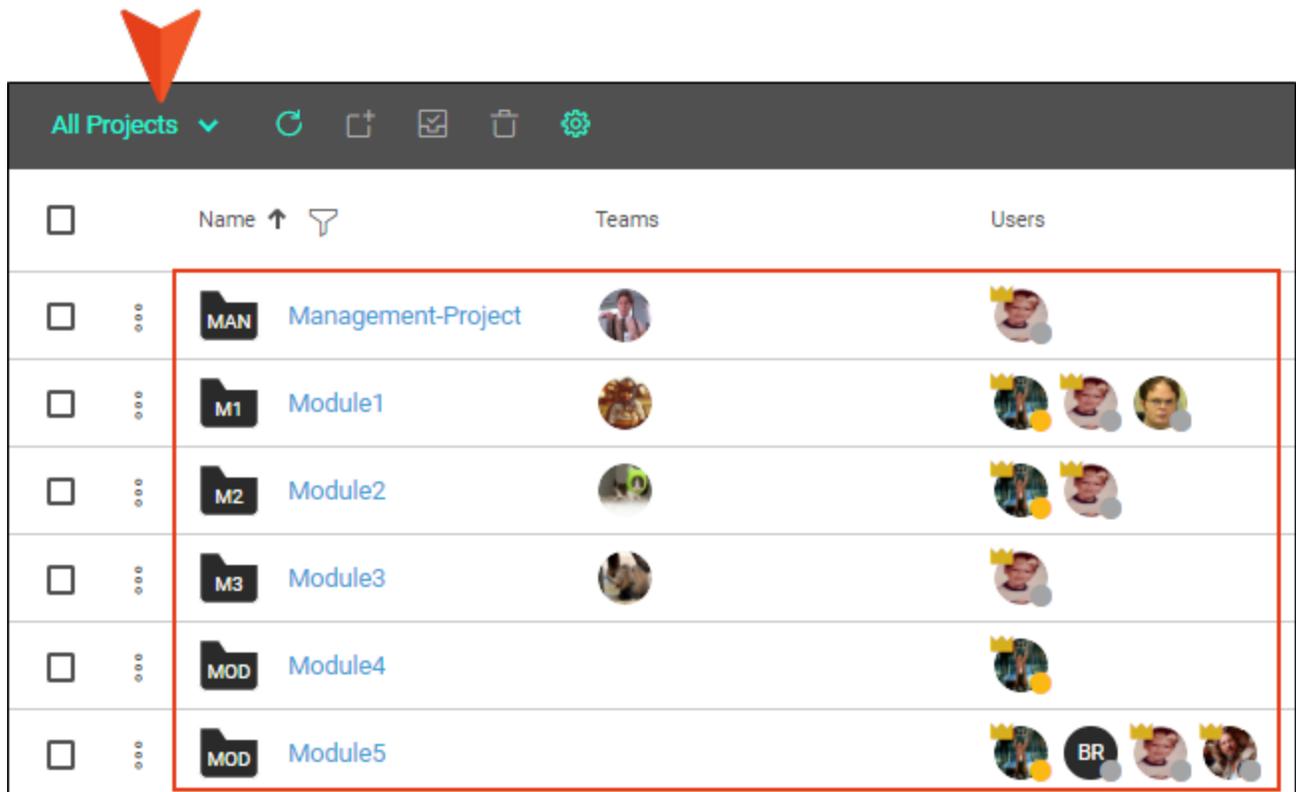
Name

<input checked="" type="checkbox"/>	MAN	Management-Project
<input checked="" type="checkbox"/>	M1	Module1
<input checked="" type="checkbox"/>	M2	Module2
<input checked="" type="checkbox"/>	M3	Module3
<input checked="" type="checkbox"/>	MOD	Module4
<input checked="" type="checkbox"/>	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.



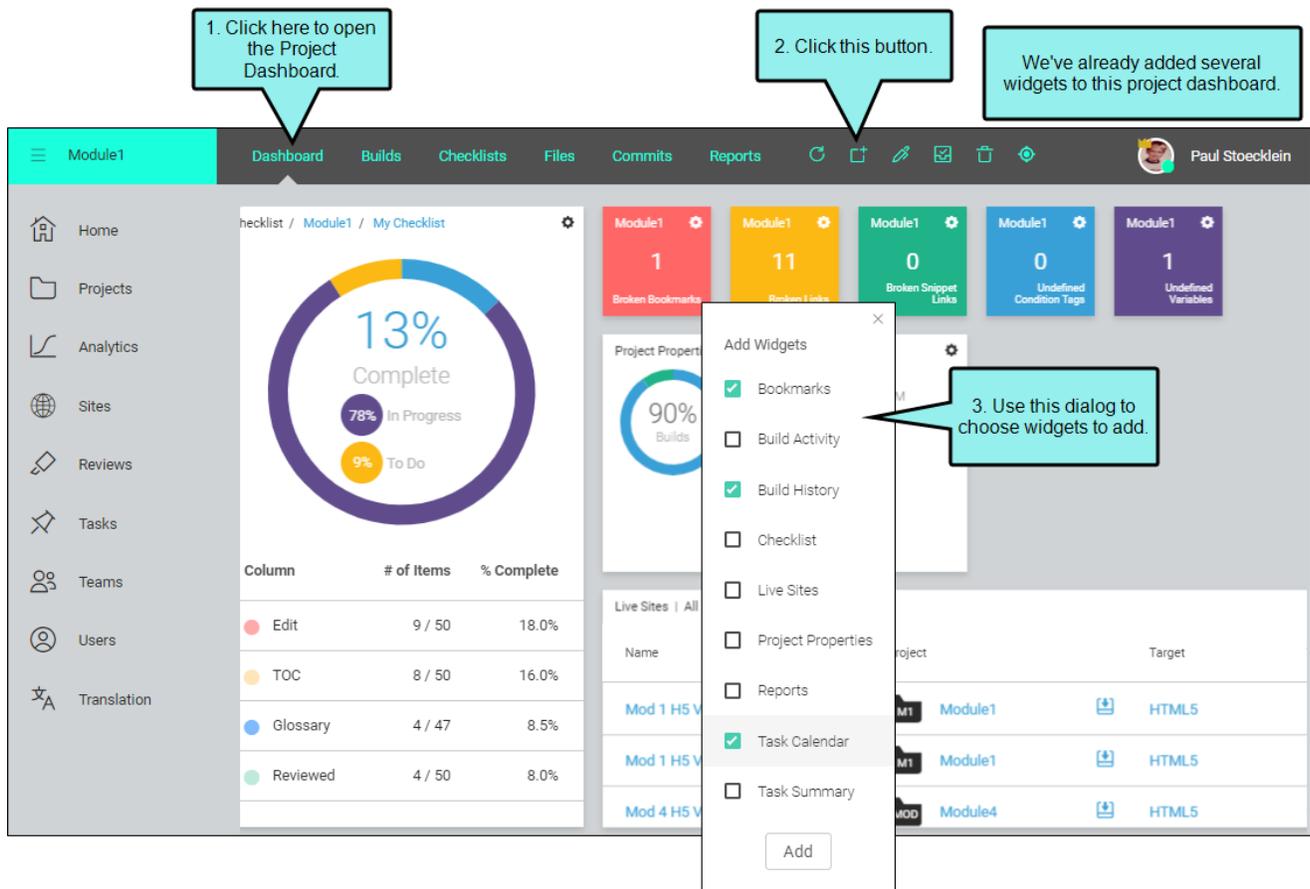


My Projects			
<input type="checkbox"/>	Name  	Teams	Users
<input type="checkbox"/>	 Module1		  
<input type="checkbox"/>	 Module2		 
<input type="checkbox"/>	 Module4		
<input type="checkbox"/>	 Module5		   

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).

The screenshot shows the 'Builds' view in a software interface. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', and 'Reports'. The main content area is divided into a 'Targets' sidebar on the left and a 'Builds' table on the right. The 'Targets' sidebar lists 'HTML5', 'PDF1', and 'PDF2', with 'HTML5' selected. The 'Builds' table has columns for 'Keep', 'Started', 'Finished', 'Duration', 'State', 'Progress', and 'By'. Several rows of build data are visible, with one row highlighted in red. Callouts provide detailed instructions and information about the interface elements.

Click these buttons or the ellipsis to work with the selected target (e.g., generate and view output, delete builds).

In this example, we've selected **Builds**.

These buttons let you take action on the selected build(s) (e.g., view output, download output, set as "keep").

This build originated from the local Flare project.

Click a build row to expand it and see more information.

All targets for the project will be listed here. In this example, we've selected an HTML5 target at the top.

Select one or more builds to take action on them.

This build has been set as "Keep."

This build is associated with a site for the purpose of setting it as "live," "private," or both.

This build originated from Central.

Keep	Started	Finished	Duration	State	Progress	By
<input type="checkbox"/>	2/19/20 9:04 AM	2/19/20 9:05 AM	00:00:29	✓ Complete	<div style="width: 100%;"></div>	[Avatar]
<input checked="" type="checkbox"/>	2/19/20 7:37 AM	2/19/20 7:38 AM	00:00:25	✓ Complete	<div style="width: 100%;"></div>	[Avatar]
<input type="checkbox"/>	9/29/19 4:16 PM	9/29/19 4:16 PM	00:00:28	✓ Complete	<div style="width: 100%;"></div>	[Avatar]
Private URL: /publish/fictionsoft/745be07c07454d4b862c50a892be3a73/Default.htm Sites: Mod 1 H5 V1						
<input type="checkbox"/>	9/24/19 10:06 AM	9/24/19 10:06 AM	00:00:21	✓ Complete	<div style="width: 100%;"></div>	[Avatar]
<input type="checkbox"/>	9/23/19 5:01 PM	9/23/19 5:02 PM	00:00:35	✓ Complete	<div style="width: 100%;"></div>	[Avatar]

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.

The screenshot shows the 'Checklists' section of a software interface. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', and 'Reports'. The 'Checklists' section is active, showing a list of checklists on the left and a detailed view of 'My Checklist' on the right. The 'My Checklist' view includes a progress indicator (15.9%), a donut chart for 'Total % Complete', and a bar chart for 'Checklist Item % Complete'. Below the charts is a table with columns for 'Folder/File Name', 'Edit', 'TOC', 'Glossary', and 'Reviewed'. The table lists files like 'Feature1.htm', 'Feature2.htm', and 'Features.htm' with corresponding status icons. Callouts provide instructions on how to create, edit, and manage checklists, as well as how to view progress charts and work with open checklists.

In this example, we've selected **Checklists**.

Click here to create a new checklist – generic or based on project files.

Click here to create and manage templates, which are useful if you create lots of checklists that contain the same rows or columns.

This area shows charts and data related to the progress of your checklist.

Click here to edit the checklist.

Checklists are listed here. In this example, we've only created one so far.

Use this area to work with an open checklist.

Statuses -- To Do, In Progress, Complete, N/A

Folder/File Name	Edit	TOC	Glossary	Reviewed
Feature1.htm	✓	🕒	🕒	🕒
Feature2.htm	✓	✓	🕒	🕒
Feature3.htm	🕒	🕒	🕒	🕒
Features.htm	🕒	🕒	🕒	🕒

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).

In this example, we've selected **Files**.

Use these tabs to preview a file, see its code, or look at its source control history (i.e., commits).

Source files from the project are listed here.

The screenshot shows a web interface with a top navigation bar containing 'Module1', 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', and 'Reports'. A user profile 'Lloyd Dobler' is in the top right. A left sidebar lists navigation options: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, and Translation. The main content area is titled 'Files' and shows a file tree with folders like 'Content', 'A-Introduction-Topics', 'B-Feature-Topics', 'C-Procedure-Topics', 'D-Reference', 'E-Frontmatter-Topics', and 'Resources'. The file 'Getting-Started.htm' is selected. The preview area shows '46 lines | 3.08 KB' and a 'Preview' tab. The content includes a heading 'Getting Started', a paragraph of Lorem Ipsum, and a table with the following data:

Table Heading	
>Lorem ipsum dolor sit amet, consectetur adipiscing elit.	Donec sagittis elementum arcu, at gravida puam mollis id.
Eusce blandit sapin a dolor accumsan `ccumsan.	Suspdndisse lectus augte, auctor in aliqual nec, fringilla id dnlor.
Integer pukvinar lacus libern, eget volutpat enil finibus non.	Aliqu`m erat volutpat.

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.

In this example, we've selected **Commits**.

All of the commits are listed, with the most recent at the top.

You can click a button to the right to view more details about a commit, including file differences.

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, and Translation. The main content area is titled 'Commits' and displays a list of commits grouped by date. The 'Commits on September 29th, 2019' group contains one commit: 'Commit of Content/Home.htm,Project/Targets/CHM.ftlar' with hash '024f7505' by 'Lloyd Dobler' on 'Sep 29, 2019 at 3:12 PM'. The 'Commits on September 28th, 2019' group contains two commits: 'Commit of Content/B-Feature-Topics/Feature2.htm,Content/B-Feature-Topics/Feature3.htm,Content/B-Feature-Topics/Features.htm,Project/Skins/Default.flskn,Project/Targets/CHM.ftlar' with hash 'e97dc1f5' by 'Lloyd Dobler' on 'Sep 28, 2019 at 10:26 AM', and 'Commit of Content/B-Feature-Topics/Feature1.htm,Content/Topics/Features.htm' with hash '7d17611a' by 'Lloyd Dobler' on 'Sep 28, 2019 at 10:19 AM'. The 'Commits on September 24th, 2019' group contains two commits: 'Commit of Content/A-Introduction-Topics/My Topic.htm' with hash 'f856f53d' by 'Lloyd Dobler' on 'Sep 24, 2019 at 8:02 PM', and 'Commit of Content/A-Introduction-Topics/My Topic.htm,Content/Resources/Snippets/Snippet.flsp' with hash 'dbaad4e2' by 'Lloyd Dobler' on 'Sep 24, 2019 at 7:58 PM'. Each commit entry includes a user profile picture, the commit message, hash, author, and time, and a 'View Commit' button to the right.

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.

The screenshot shows the 'Reports' section of a software interface. The top navigation bar includes 'Dashboard', 'Builds', 'Checklists', 'Files', 'Commits', and 'Reports'. The 'Reports' tab is active, showing a sidebar on the left and a main content area on the right. The sidebar is divided into 'Critical Reports' and 'Stats'. The 'Critical Reports' section lists categories like 'Broken Bookmarks' (1), 'Broken Links' (6), 'Broken Snippet Links' (0), 'Undefined Condition Tags' (0), 'Undefined File Tags' (0), 'Undefined Glossary Terms' (0), and 'Undefined Variables' (1). The 'Stats' section lists 'Images' (16) and 'Segments' (199). The main content area displays a bar chart titled 'Broken Links - Last 10 scans' with data points for various dates in September. Below the chart is a table titled 'Latest Scan Results - Limited to First 100 Results. Open the Analysis ribbon in Flare to see complete results.' The table has columns for Folder, File, Link, Link Text, Link Tag, Extension, and Type. Callouts provide context: 'In this example, we've selected Reports.' points to the Reports tab; 'A chart showing the results of each push.' points to the bar chart; 'Critical reports with the number of issues (if any) from the most recent scan are listed here.' points to the Critical Reports list; 'Statistical categories are listed here.' points to the Stats list; and 'A grid listing the information related to the selected report or statistical category on the left.' points to the table.

In this example, we've selected **Reports**.

A chart showing the results of each push.

Critical reports with the number of issues (if any) from the most recent scan are listed here.

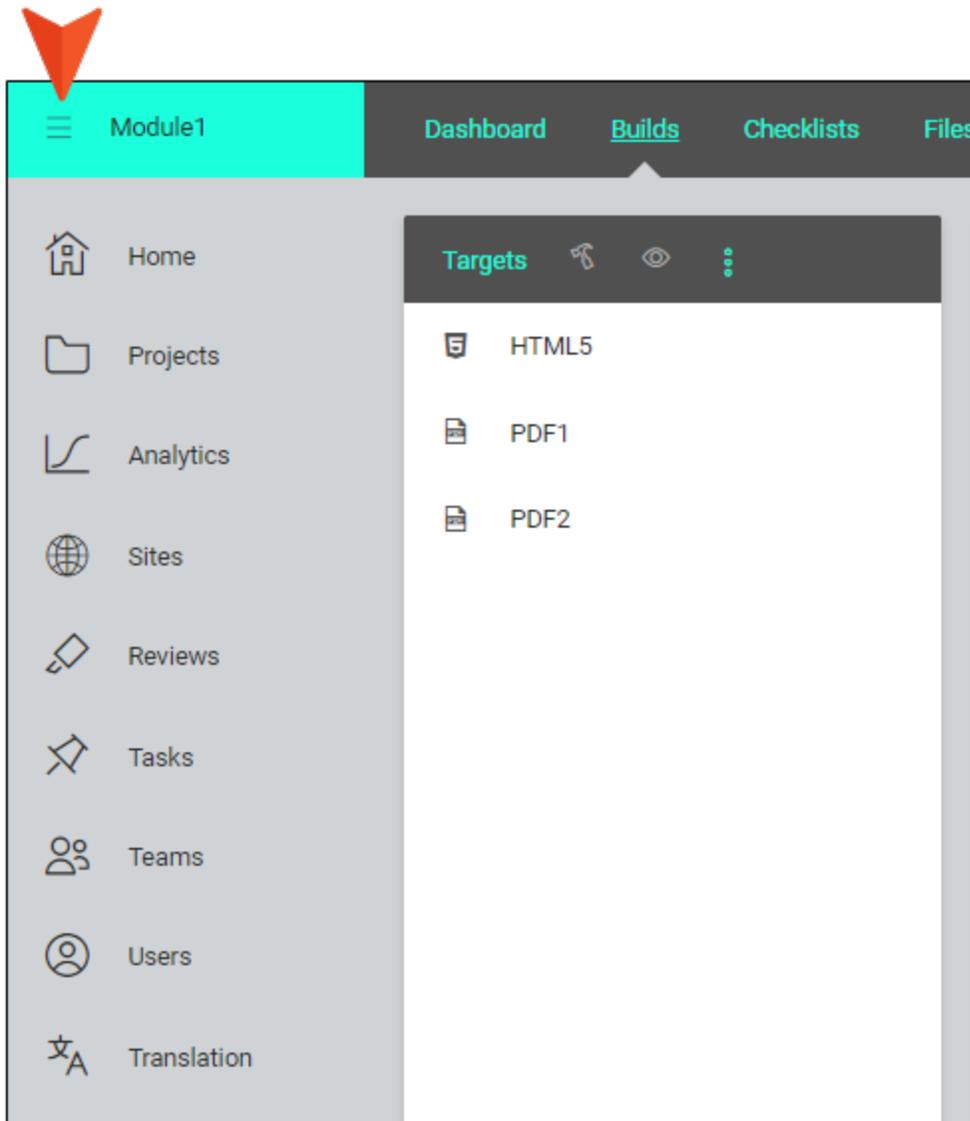
Statistical categories are listed here.

A grid listing the information related to the selected report or statistical category on the left.

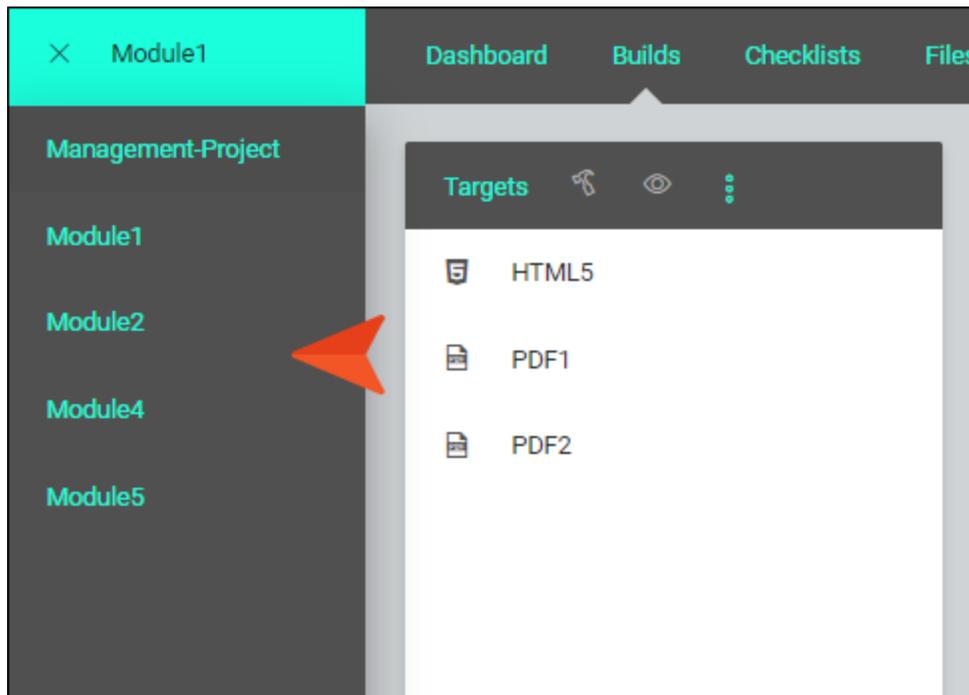
Folder	File	Link	Link Text	Link Tag	Extension	Type
Content/B-Feature	Feature1.htm	Content/D-Referen	Tips	MadCap:xref	htm	Missing Link
Content/B-Feature	Feature1.htm	Content/D-Referen	Tips	Ma		Link
Content/B-Feature	Feature3.htm	Content/D-Referen	Tips			Link
Content/B-Feature	Features.htm	Content/D-Referen	Tips	Ma		Link
Content/C-Procedi	Procedure1.htm	Project/VariableSe				Missing Link
Content/C-Procedi	Procedure1.htm	Content/D-Referen	Tips	MadCap:xref	htm	Missing Link

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.



CHAPTER 6

Sites

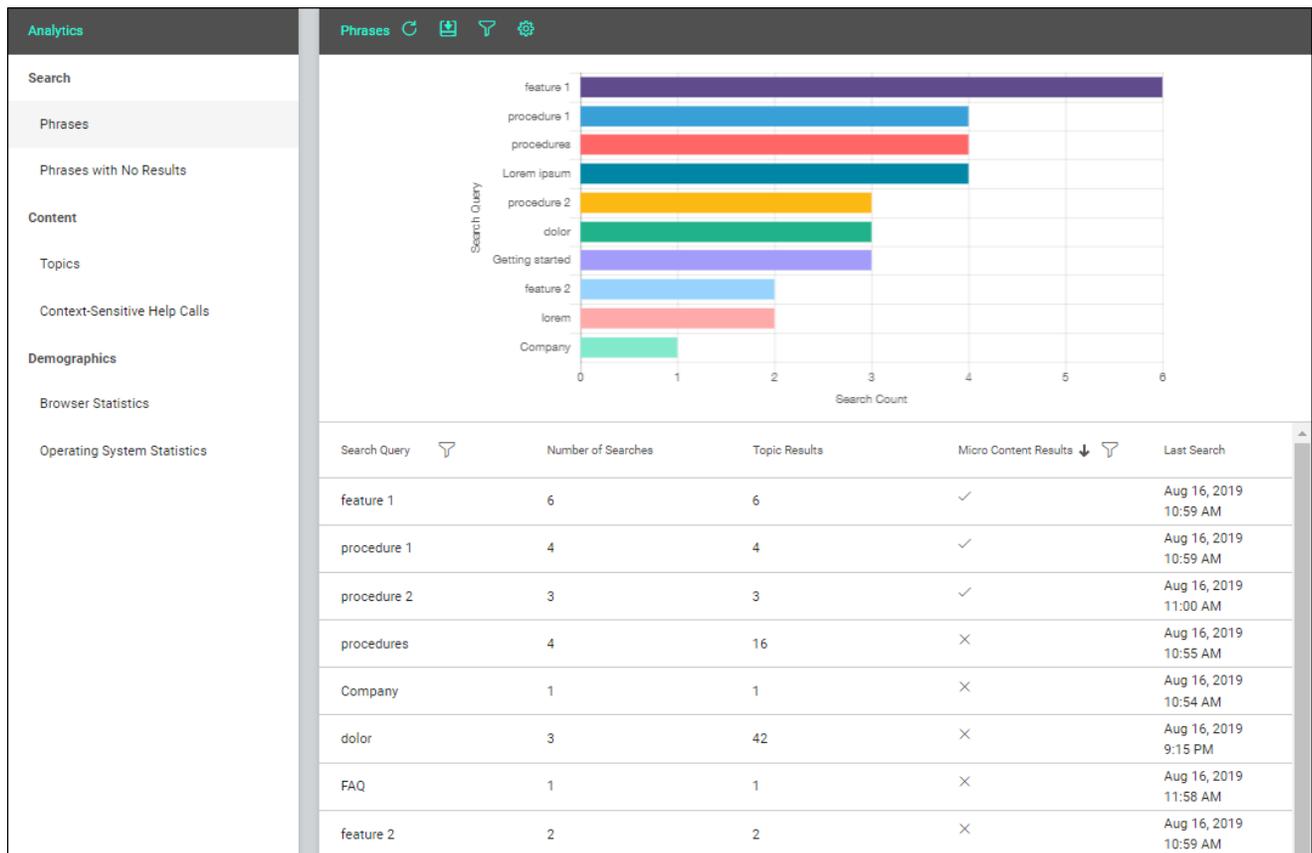
The Sites page lets you manage and view sites on the license. A site is a collection of information about an output and its destination. In other words, after you generate output, you want to make it available to your customers. That's what sites are all about. Three page views are available: Sites,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

	Live	Name	Vanity	Private	Access
<input type="checkbox"/>		Mod 1 H5 V1	mod1-h5-v1	✓	
<input type="checkbox"/>		Mod 1 H5 V2	mod1-h5-v2	✓	
<input type="checkbox"/>		Mod 2 H5	mod2-h5		All users
<input type="checkbox"/>		Mod 2 PDF			All users
<input type="checkbox"/>		Mod 3 H5 V1	mod3-h5-v1		All users
<input type="checkbox"/>		Mod 3 H5 V2	mod3-h5-v2		All users
<input type="checkbox"/>		Mod 4 H5 V2	v2		All users

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).

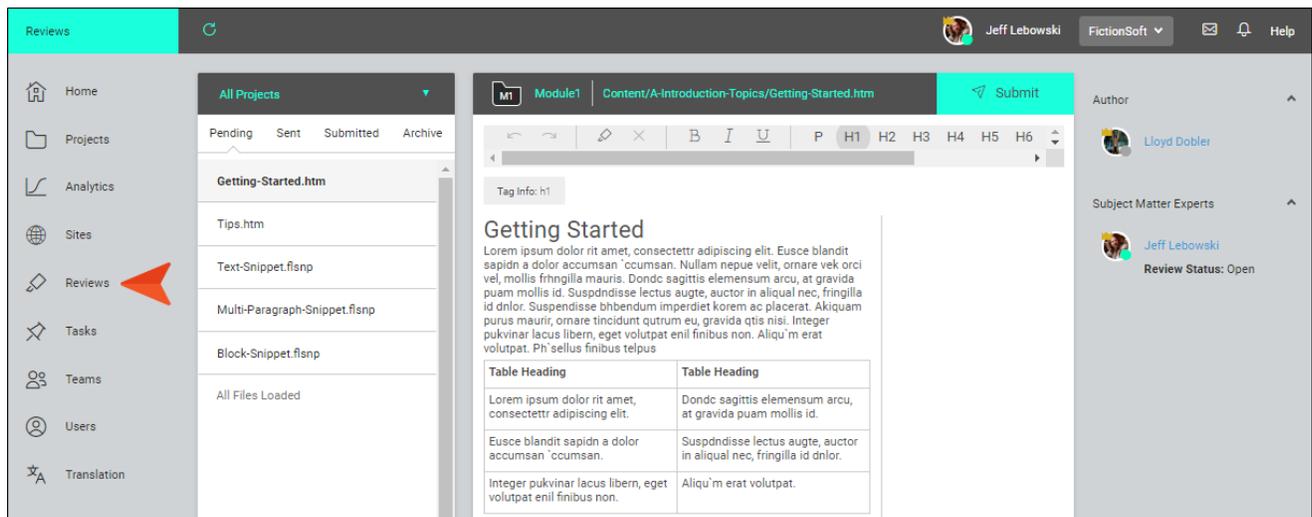


Central Analytics works on Flare projects uploaded to Central, or you can host output on your own servers. If you host the output outside of Central, you still need to use Central with a key to view the analytics data. Also, the client must be able to communicate with Central.

CHAPTER 8

Reviews

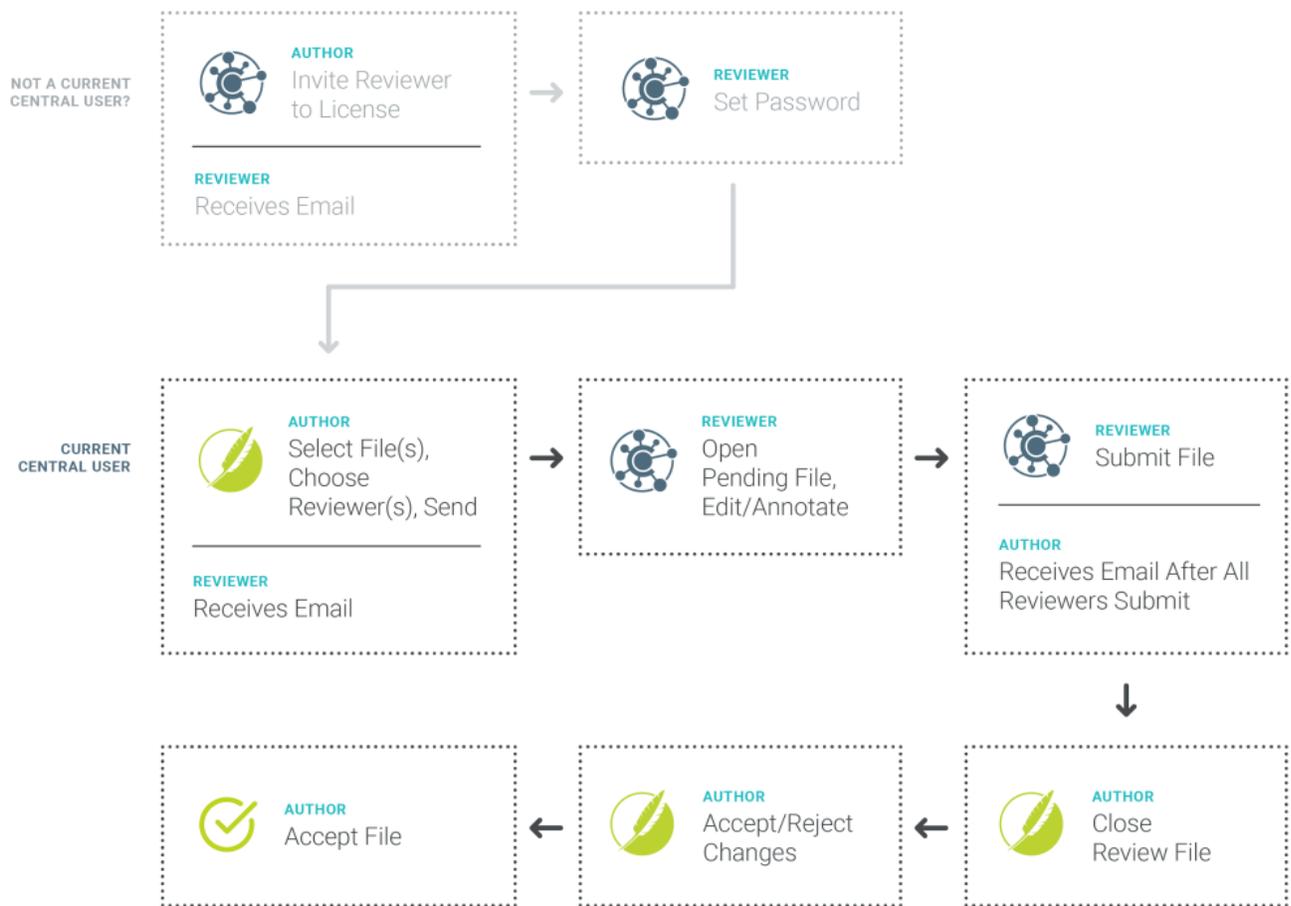
The Reviews page lets you view, edit, and manage Flare files that have been sent for review. Other review tasks (e.g., choosing and sending files for review) are done from Flare.



The screenshot displays the Flare Reviews interface. On the left, a navigation sidebar includes Home, Projects, Analytics, Sites, Reviews (highlighted with a red arrow), Tasks, Teams, Users, and Translation. The main area is divided into three sections: a file list, a document preview, and a user profile. The file list, under 'All Projects', shows a table with columns for 'Pending', 'Sent', 'Submitted', and 'Archive'. The 'Getting-Started.htm' file is selected. The document preview shows the content of 'Getting-Started.htm', including a title, a paragraph of Lorem Ipsum text, and a table with two columns and three rows. The user profile on the right identifies the author as 'Lloyd Dobler' and the reviewer as 'Jeff Leowski', with a 'Review Status: Open' indicator.

Getting-Started.htm
Tips.htm
Text-Snippet.flxnp
Multi-Paragraph-Snippet.flxnp
Block-Snippet.flxnp
All Files Loaded

Table Heading	Table Heading
Lorem ipsum dolor rit amet, consectetur adipiscing elit.	Dondc sagittis elemensum arcu, at gravida puam mollis id.
Eusce blandit sapidin a dolor accumsan 'ccumsan.	Suspdndisse lectus augte, auctor in aliquat nec, fringilla id dnlor.
Integer pukvinar lacus libern, eget volutpat enil finibus non.	Aliqu' m erat volutpat.



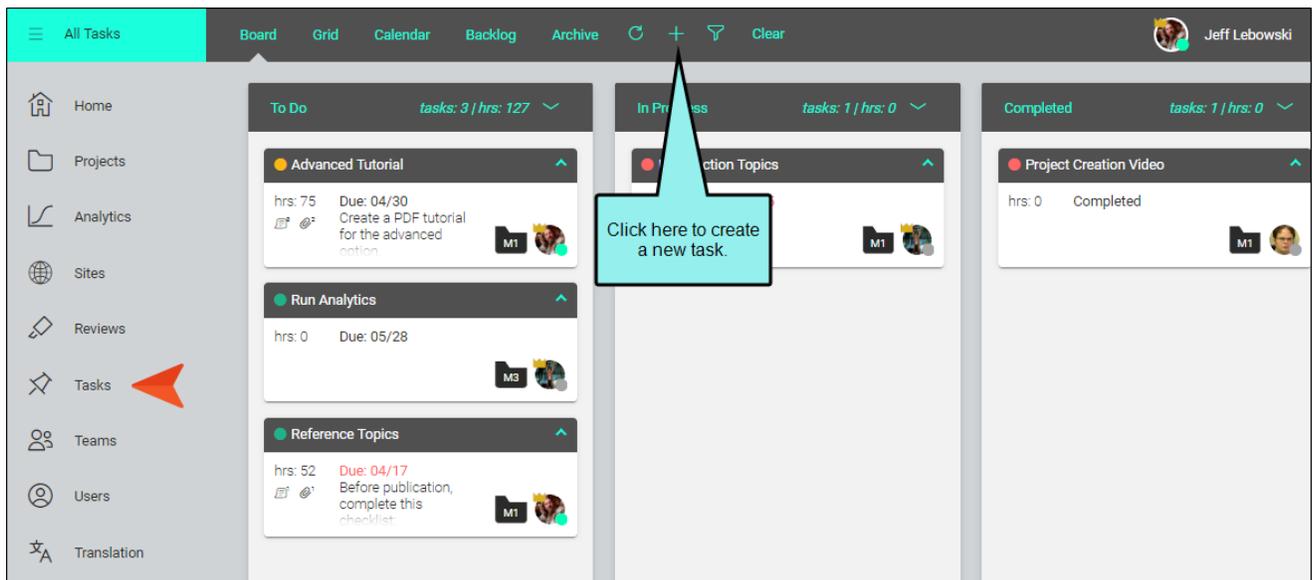
Benefits of this review workflow include:

- **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.

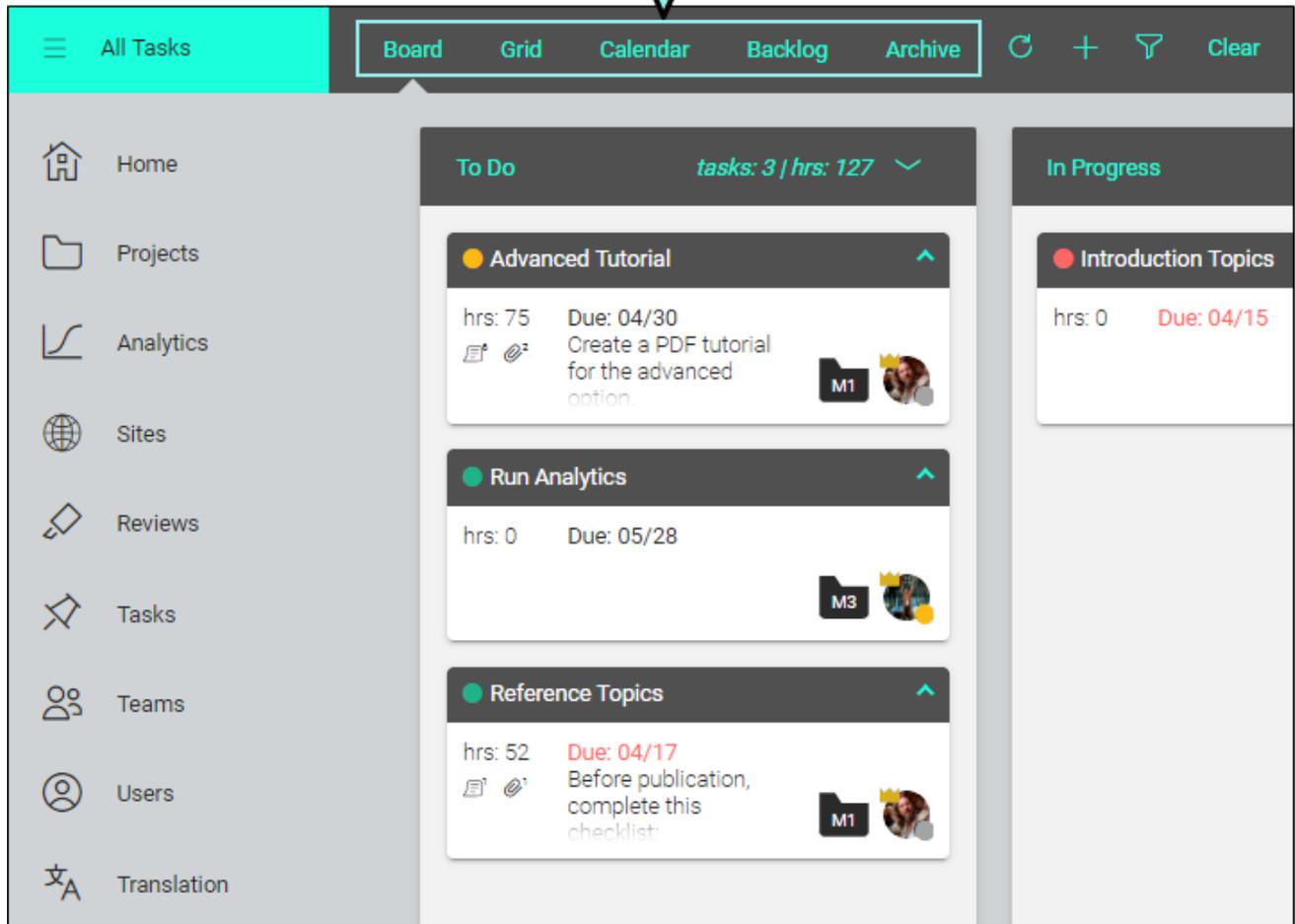


Add details for the task in this dialog. Only the Title field is required.

The screenshot shows a task details dialog box with a dark header containing three tabs: 'Details', 'Discussion', and 'Attachments', along with a close button 'X'. The main content area is titled 'Overview Video' with a 'Move' link on the right. Below the title, there are several fields: a priority dropdown set to 'Low Priority', a 'Start:' field with a calendar icon and a date input box, a 'Status:' dropdown set to 'To Do', a 'Due:' field with a calendar icon and a date input box, and a duration field showing '0 hrs 6 pos' with an 'All Day Event' checkbox. There are also icons for comments (0) and attachments (0). The 'Owner:' field shows a profile picture and the name 'Lloyd Dobler' with a dropdown arrow. The 'Assigned:' field also shows 'Lloyd Dobler' with a dropdown arrow. A 'Project:' field is partially visible with a blue envelope icon. A callout points to the 'Assigned:' dropdown, stating: 'The task will initially be assigned to yourself. But you can click this down arrow to assign it to someone else.' Another callout points to the top of the dialog, stating: 'Add details for the task in this dialog. Only the Title field is required.'

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

Multiple ways to view tasks

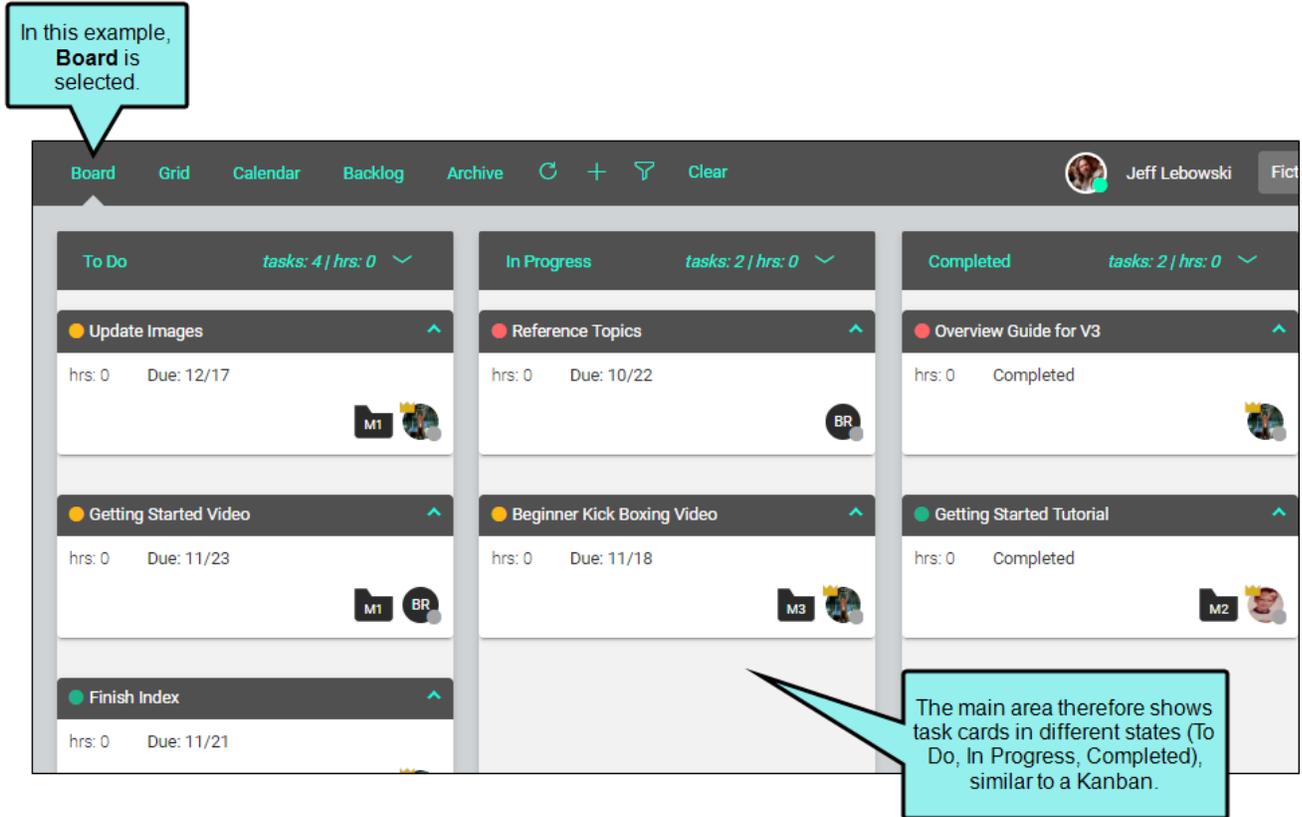


This chapter discusses the following:

Board	52
Grid	58
Calendar	59
Backlog	62
Archive	63

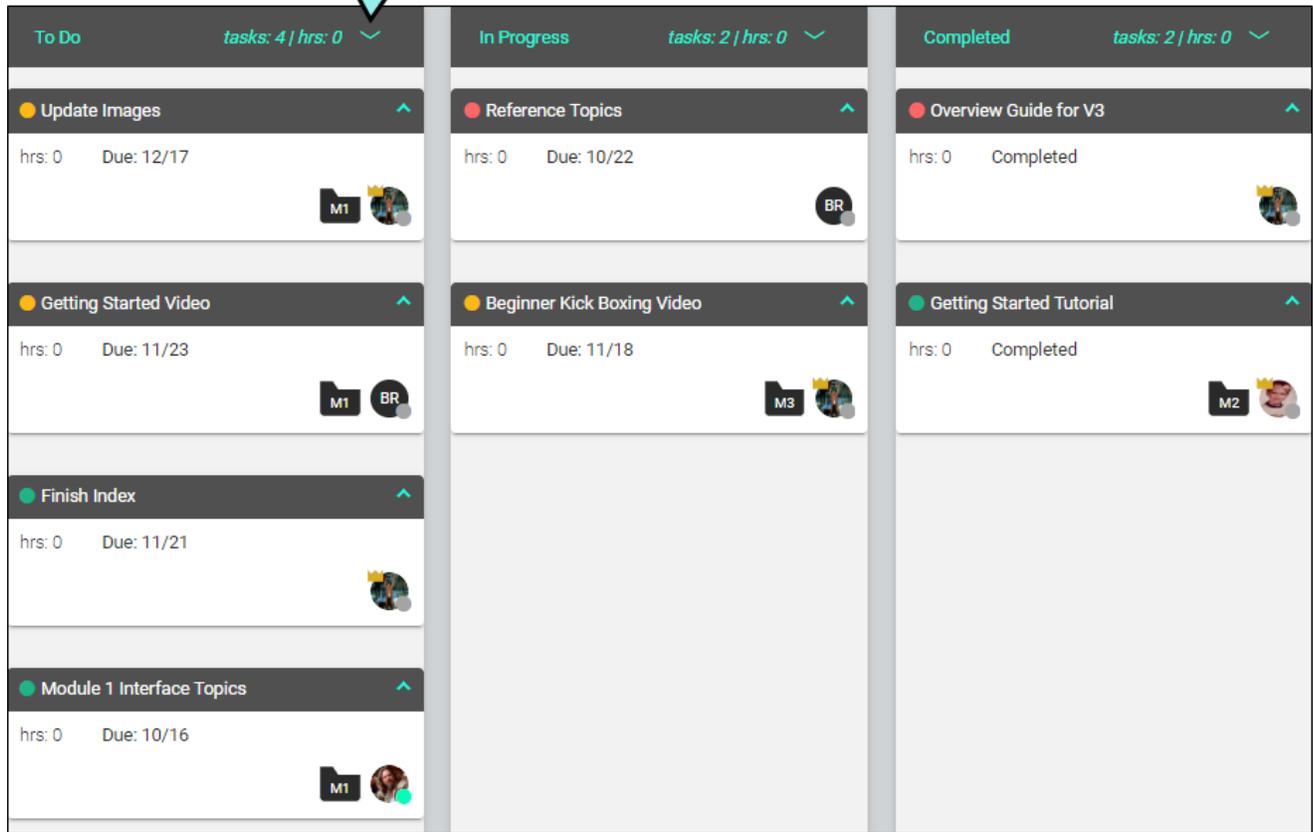
Board

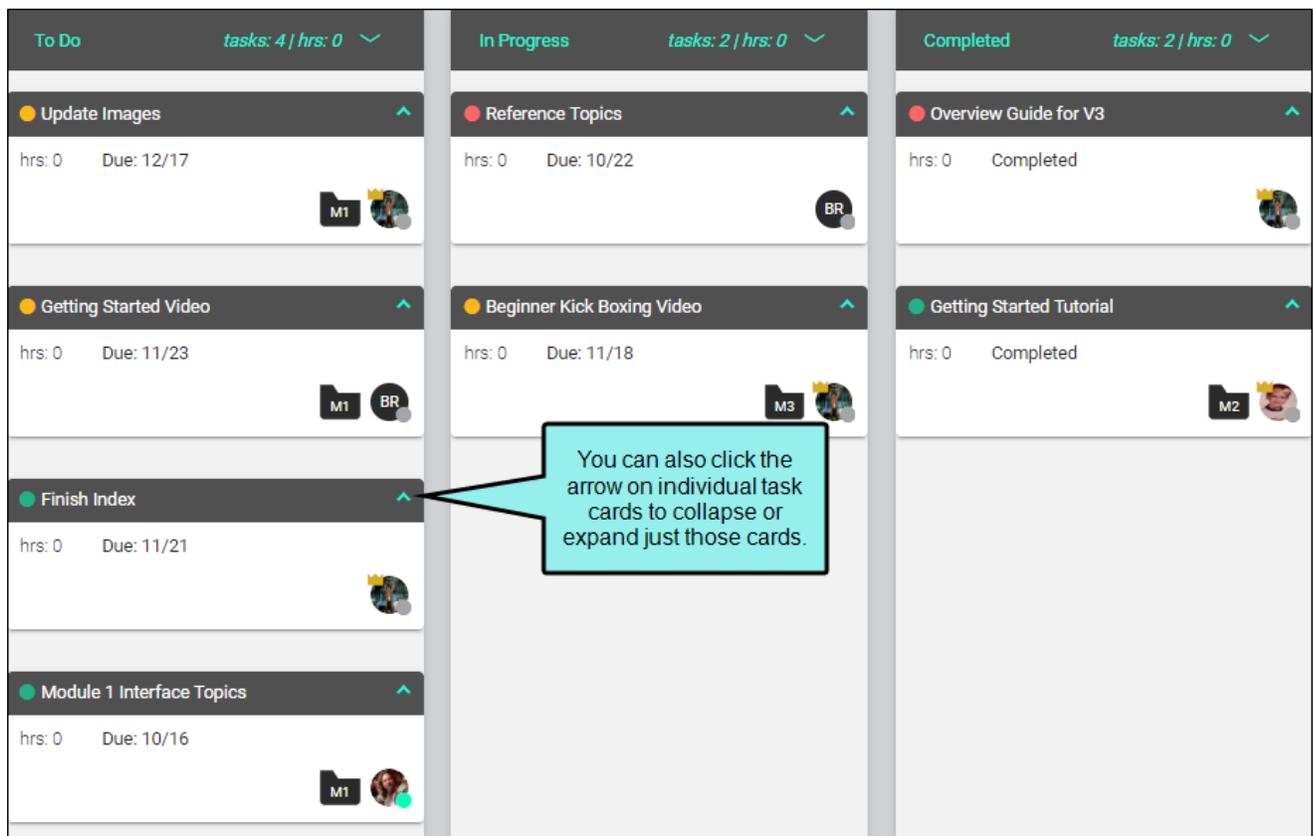
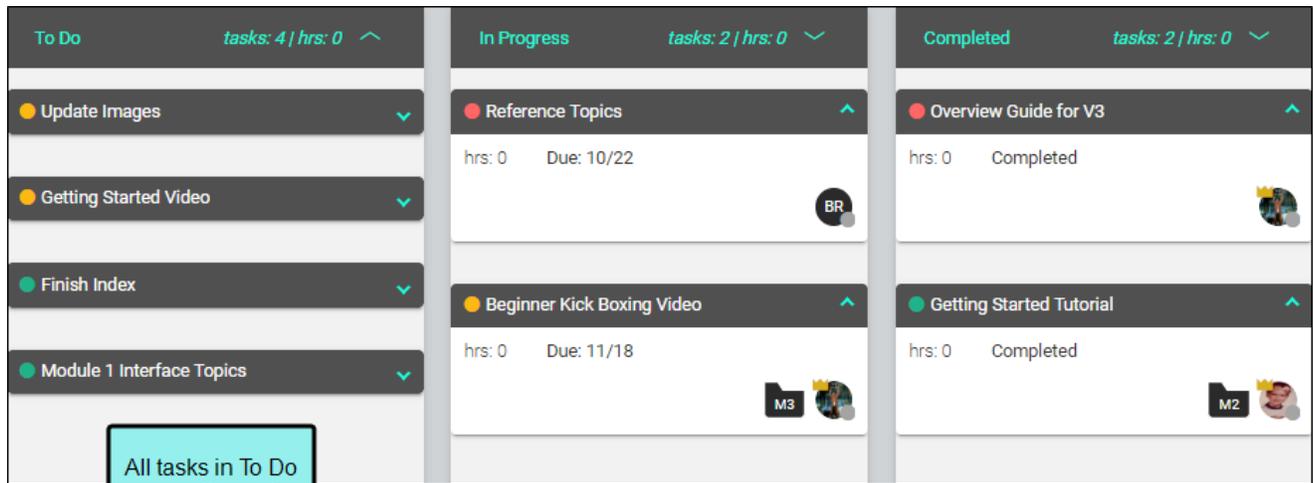
The Board view is similar to a Kanban board. It consists of three preset milestones: To Do, In Progress, and Completed. You can move tasks from one milestone to another as work progresses. Anyone can open a task and add a comment to it. This lets you maintain conversations with others related to a specific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



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

You can click the arrow at the top to collapse or expand all tasks in a milestone.

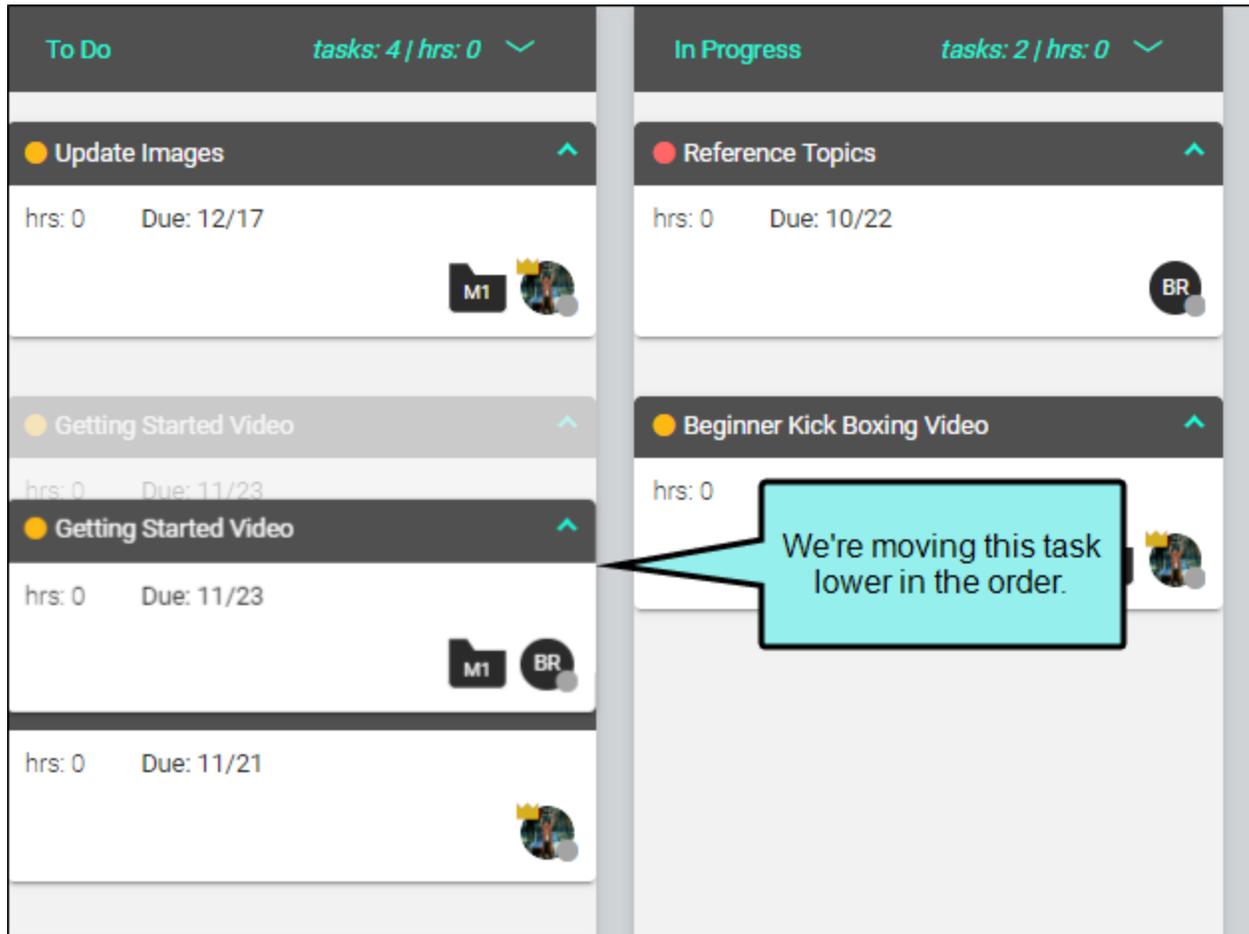




The image shows a Kanban board with three columns: **To Do** (4 tasks, 0 hours), **In Progress** (2 tasks, 0 hours), and **Completed** (2 tasks, 0 hours). Each task card displays its title, status, due date, and assignee. A callout box highlights two collapsed task cards in the In Progress column.

Column	Task Title	Status	Due Date	Assignee	Hours
To Do	Update Images	Open	12/17	M1	0
To Do	Getting Started Video	Collapsed			
To Do	Finish Index	Collapsed			
To Do	Module 1 Interface Topics	Open	10/16	M1	0
In Progress	Reference Topics	Open	10/22	BR	0
In Progress	Beginner K...	Collapsed			
Completed	Overview Guide for V3	Completed			0
Completed	Getting Started Tutorial	Completed		M2	0

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



The image shows a Kanban-style task board with two columns: 'To Do' and 'In Progress'. Each column has a header with a title and a summary of tasks and hours. The 'To Do' column contains three tasks, and the 'In Progress' column contains two. A callout bubble points to the 'Getting Started Video' task in the 'To Do' column.

Column	Task Name	Hours	Due Date	Assignee	Location
To Do	Update Images	hrs: 0	Due: 12/17	M1	BR
To Do	Finish Index	hrs: 0	Due: 11/21	BR	
To Do	Getting Started Video	hrs: 0	Due: 11/23	M1	BR
In Progress	Reference Topics	hrs: 0	Due: 10/22	BR	
In Progress	Beginner Kick Boxing Video	hrs: 0	Due: 11/18	M3	BR

New location for this task.

Grid

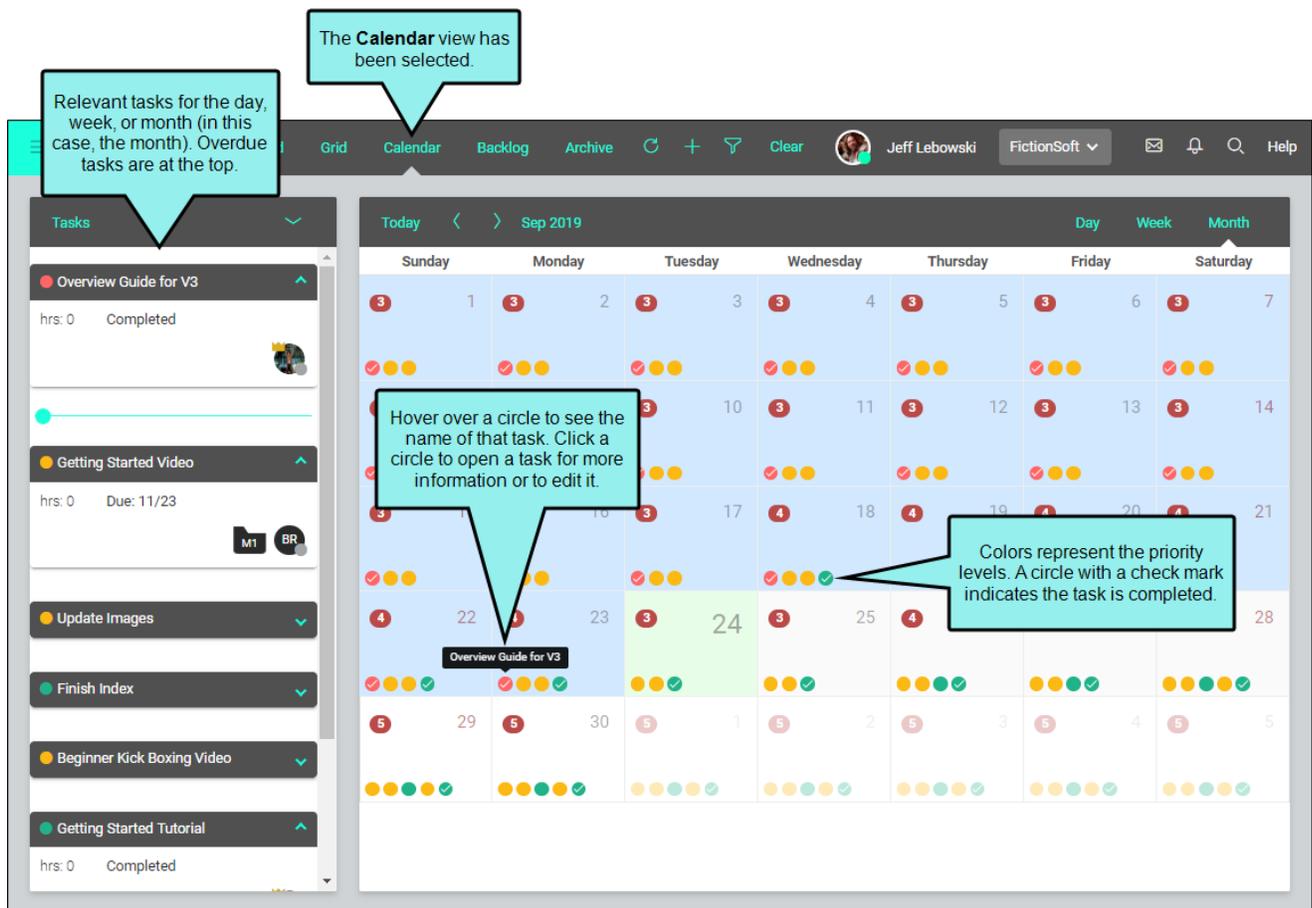
The Grid view displays tasks in a row format. You can click a task name to edit it. Also, you can use the check boxes to select one or more rows in order to take an action on all those tasks at once, such as moving them to another milestone or deleting them.

The screenshot shows a task management application in Grid view. The top navigation bar includes 'All Tasks', 'Board', 'Grid', 'Calendar', 'Backlog', 'Archive', and 'Clear'. The main content area displays a list of tasks with columns for Name, Project, Assigned To, Priority, and Start Date. Callouts provide instructions: 'The Grid view has been selected.' points to the 'Grid' tab; 'You can click on a task name to edit it.' points to the 'Update Images' task name; 'Notice the check boxes, which allow you to multi-select tasks and take action on them (e.g., delete).' points to the checkboxes in the first column; and 'You can also use a context menu to take action on a specific task.' points to the three-dot menu icon next to a task.

<input type="checkbox"/>	Name	Project	Assigned To	Priority	Start Date
<input type="checkbox"/>	Reference Topics	M1	Jeff Lebowski	Low	1/20/2020 12:00 A
<input type="checkbox"/>	Run Analytics	M3	Lloyd Dobler	Low	8/22/19 12:00 A
<input type="checkbox"/>	Update Images			Medium	8/13/19 12:00 A
<input type="checkbox"/>	Side Nav	M2	Paul Stocklein	High	8/5/19 12:00 A
<input type="checkbox"/>	Project Creation Video		Dwight Schrute	High	9/19/19 12:00 A
<input type="checkbox"/>			Paul Stocklein	Low	9/23/19 12:00 A
<input type="checkbox"/>	Introduction T		Lloyd Dobler	High	9/30/19 12:00 A
<input type="checkbox"/>	Module 1 Interface To...	M1	Lloyd Dobler	High	9/9/19 12:00 A
<input type="checkbox"/>			Jeff Lebowski	Medium	9/30/19 12:00 A
<input type="checkbox"/>	Getting Started Tutorial	M1	Dwight Schrute	Medium	10/3/19 12:00 A
<input type="checkbox"/>	Advanced Tutorial	M1	Jeff Lebowski	Medium	9/30/19 12:00 A

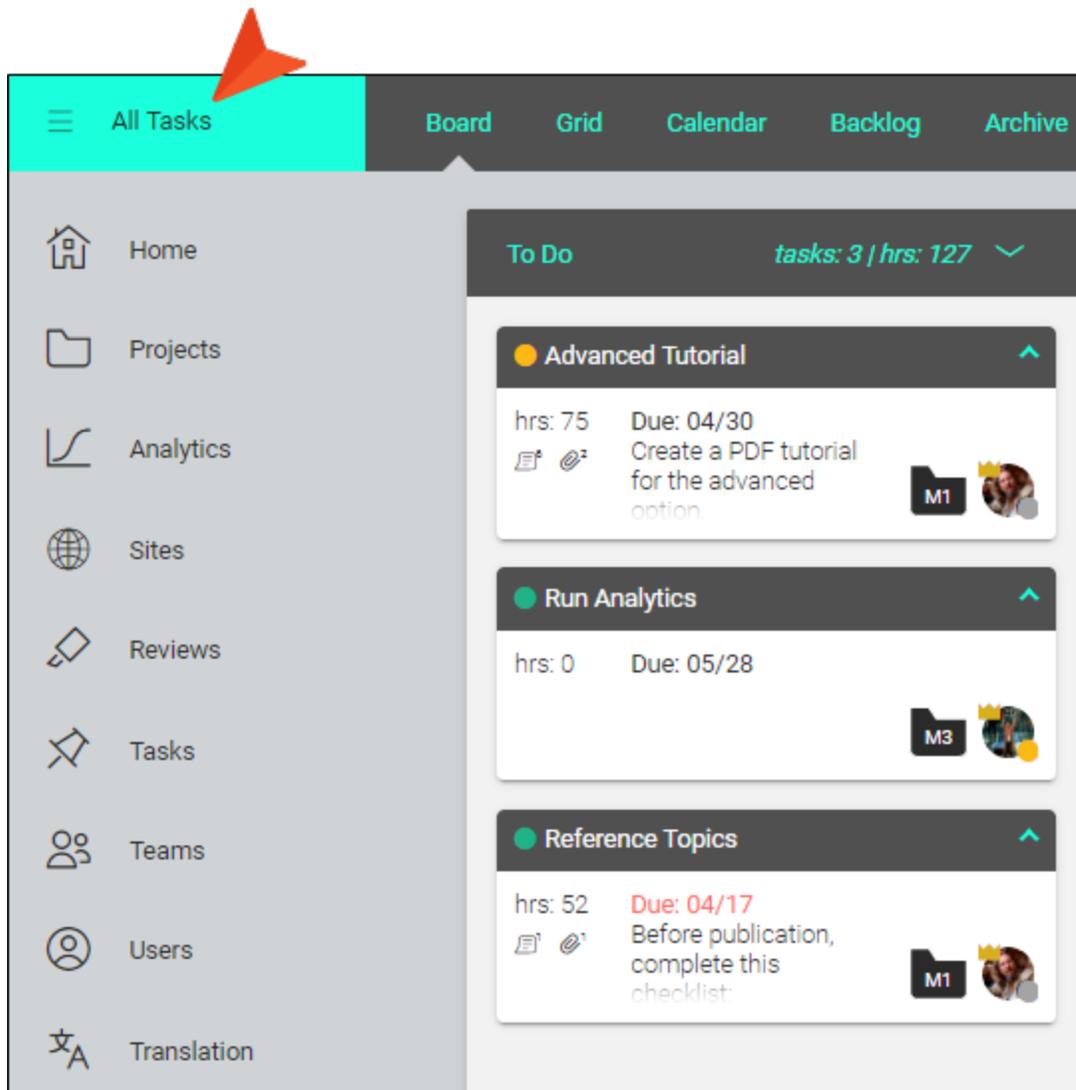
Calendar

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.

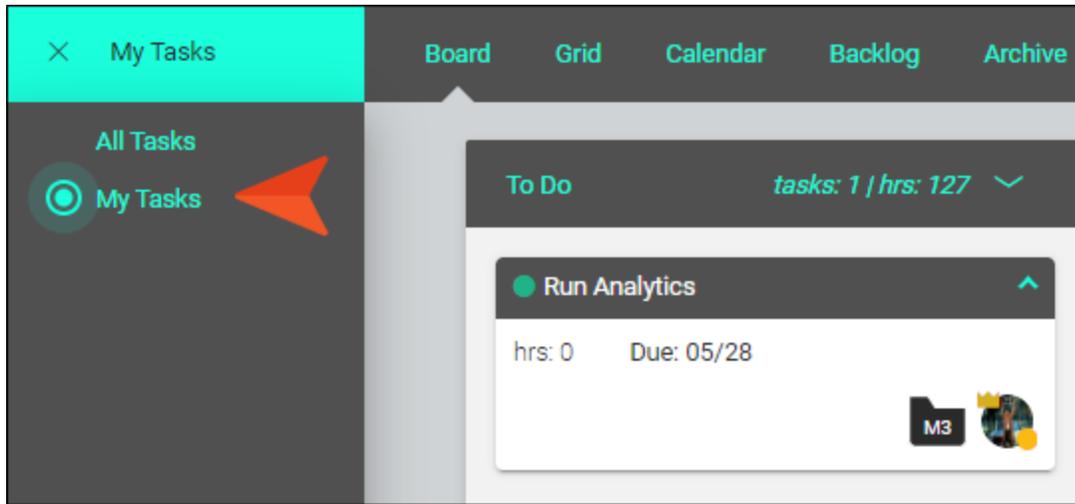


Since the Calendar view can get cluttered if you have a lot of users and many colored circles representing tasks for all them, this is a good place to use a filter. For example, you can switch between All Tasks (showing tasks for all users) and My Tasks (showing only tasks assigned to you). This and 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.

In this example, we have selected **Backlog**.

<input type="checkbox"/>	Name	Project	Assigned To	Priority	Start Date	Due Date	Est. Hours
<input type="checkbox"/>	Module 1 Interfa...	M1	Lloyd Do...	High	9/9/19 12:00 AM	3/27/20 12:00 AM	0
<input type="checkbox"/>	Product Release ...	M1	Jeff Leb...	Medium	9/30/19 12:00 AM	11/15/19 12:00 AM	0
<input type="checkbox"/>	Getting Started T...	M1	Dwight S...	Medium	10/3/19 12:00 AM	10/22/19 12:00 AM	0

These tasks were moved into Backlog.

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.

In this example, we have selected **Archive**.

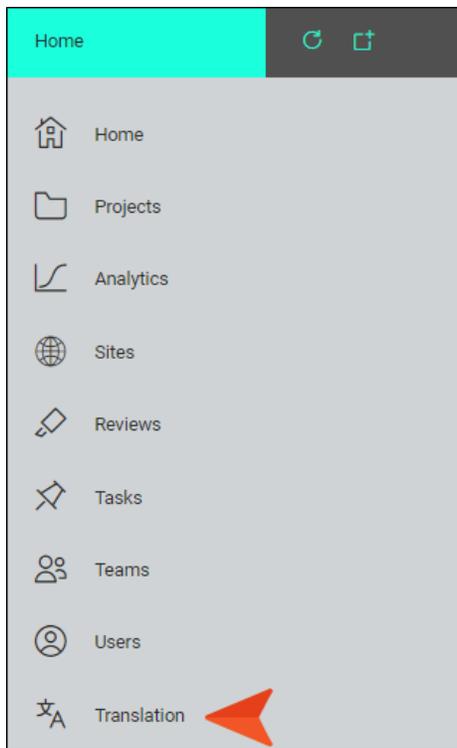
<input type="checkbox"/>	Name	Project	Assigned To	Priority	Start Date	Due Date	Est. Hours
<input type="checkbox"/>	Update Images	M3	Lloyd Do...	Medium	8/13/19 12:00 AM	3/11/20 12:00 AM	0
<input type="checkbox"/>	Side Nav	M2	Paul Sto...	High	8/5/19 12:00 AM	3/19/20 12:00 AM	0
<input type="checkbox"/>	Image Topics	M1	Paul Sto...	Low	9/23/19 12:00 AM	5/4/20 12:00 AM	0

These tasks were moved into Archive.

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.

 madtranslations - 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.

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](#).

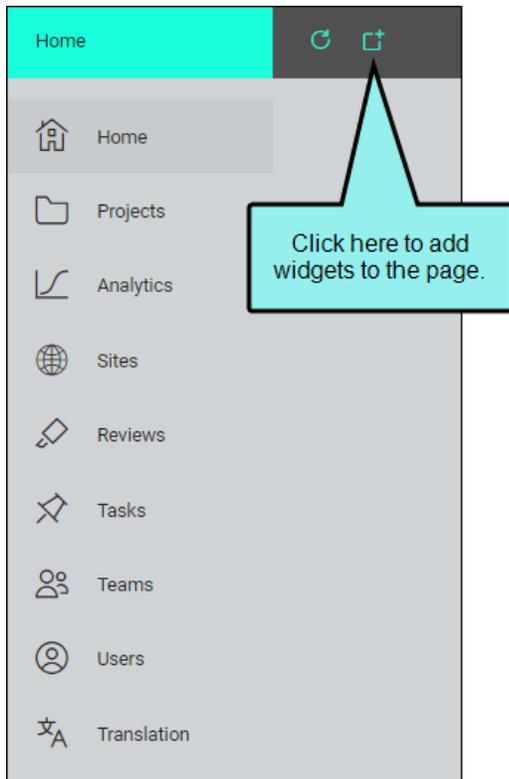
Once your request has been received, a confirmation email will be sent to the email address associated with this MadCap Central account.

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.

The screenshot shows a dashboard interface with a sidebar on the left and a main content area. The sidebar includes navigation items: Home, Projects, Analytics, Sites, Reviews, Tasks, Teams, Users, and Translation. The main content area features three widgets: 'Storage and Usage', 'Bookmarks', and 'Live Sites'. Three callout boxes provide context for these widgets.

Callout 1: In this example, we've added three different widgets to the Home page.

Callout 2: The Storage and Usage widget lets you view and manage your space and seats on the license.

Callout 3: The Bookmarks widget lets you quickly open certain Flare project pages.

Callout 4: The Live Sites widget lets you see any outputs that are published for people to see.

Category	Value
Storage	156.18 MB of 10.00 GB Used
Source Files	27MB
Builds	127MB
Tasks	63KB
Misc	2MB
Authors	4 of 30 Used
Subject Matter Experts	1 of 10 Used
Viewers	0 of Unlimited

Bookmark	Project
M1	Module1
M2	Module2
M3	Module3

Name	Project
Module1_HTML5	Module1
Module1_HTML5	Module1
Module1_HTML5	Module1

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.

In this example, we've added two Task Summary widgets.

Click here to filter a widget, as well as to perform other actions, such as duplicating or deleting a widget.

This widget has been filtered to show tasks for one user.

And this widget has been filtered to show tasks for another user.

Task Status	Count	Percentage
To Do	0	0%
In Progress	3	75%
Complete	0	0%
Backlog	0	0%
Archive	1	25%

Task Status	Count	Percentage
To Do	1	33%
In Progress	1	33%
Complete	0	0%
Backlog	1	33%
Archive	0	0%

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