madcap Feedback™

Getting Started Guide

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Contents

Chapter 1

Introduction

Welcome to MadCap Feedback and the MadCap Feedback Explorer, which let you track live user feedback on your MadCap Flare online documentation—not only for Web-based Help, but also for desktop Help such as Microsoft HTML Help and DotNet Help.

Getting Started

The following will help you get started quickly with MadCap Feedback and the MadCap Feedback Explorer:

- **About MadCap Feedback** Learn the basics of MadCap Feedback. See "About MadCap Feedback" on page 6.
- **About the MadCap Feedback Explorer** Learn the basics of the MadCap Feedback Explorer, including the way that it works in conjunction with MadCap Feedback and your Flare online output. See "About the MadCap Feedback Explorer" on page 7.
- **Feedback Explorer—Internal Versus External** View a table that compares the features available in the internal Feedback Explorer with those in the external Feedback Explorer. See "Feedback Explorer—Internal Versus External" on page 8.
- **Getting Set Up** Check out the basic steps that are necessary for configuring your system and using MadCap Feedback. See "Getting Set Up with MadCap Feedback" on page 13.
- **Tour the Workspace** Become familiar with the Feedback Explorer's user interface. See "Touring the Feedback Explorer Workspace" on page 25.

About MadCap Feedback

MadCap Feedback is a live Help reporting service that works in conjunction with Flare to provide Web 2.0 community benefits for your online output—including integrated user comments and statistics such as search keywords used and topics visited. Most of these benefits are available not only for Web-based Help (i.e., WebHelp and WebHelp Plus), but also for desktop Help (i.e., Microsoft HTML Help and DotNet Help).

You have two options when setting up MadCap Feedback:

- **MadCap Feedback Server** With MadCap Feedback Server, you install the necessary software on your own hardware to host the Feedback data. By using the MadCap Feedback Server Admin, your system administrator (or other responsible individual) can enter the appropriate server information, create the necessary SQL database, and perform maintenance tasks such as scheduling automated backups of the data. Authors can use the Feedback license keys that are issued as needed for their various targets and projects. The Flare output files can be hosted on the same server hosting the Feedback data, but it is not mandatory; the output files can be published anywhere you like.
- **MadCap Feedback Service** With MadCap Feedback Service, there is no need to purchase your own hardware or host the Feedback statistics. MadCap Software does the hosting for you. This does not mean, however, that you publish the output files to MadCap Software's server. Instead, you publish the output files to your own server or anywhere else that you choose. Even if you have attached your online Help to a desktop application, you can still take advantage of the Feedback features.

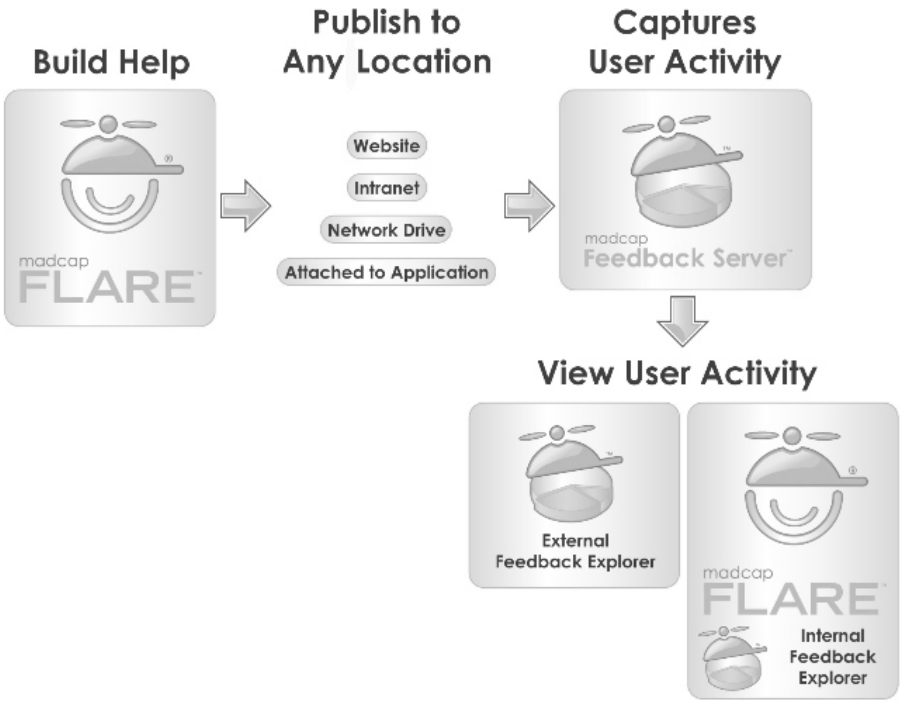
About the MadCap Feedback Explorer

The MadCap Feedback Explorer provides an interface that lets you view and track reader activity on your Flare online output. There are two versions of the Feedback Explorer: internal and external.

- **Internal Feedback Explorer** This is a light version of the Feedback Explorer that is part of the Flare interface. It lets you view user activity for the primary target (as well as any other targets using the same Feedback license). You can open this window in Flare by selecting **View>Feedback Explorer**. For more information, see the Flare online Help.
- **External Feedback Explorer** This is a standalone application that is separate from Flare, and it is a more robust version than the internal Feedback Explorer, containing more features. It displays user activity for the most recently opened Feedback file (which is associated with a target/license combination in Flare).

How It Works

The following diagram illustrates how the Feedback Explorer works with MadCap Feedback and MadCap Flare output.



Feedback Explorer—Internal Versus External

The following table shows all Feedback tasks that can be performed in the light version of the Feedback Explorer (located in the Flare interface), compared with those that can be performed in this more robust, external version of the Feedback Explorer.

Feature	Task	Internal Feedback Explorer	External Feedback Explorer
Active users	Export to CSV file		X
	Export to TXT file		X
	View		X
Administrators	Add		X
	Remove		X
Charts	Create		X
	Edit chart styles		X
Comments (author-only)	Export to CSV file	X	X
	Export to TXT file	X	X
	View all author-only comments	X	X
Comments (community-wide)	Accept	X	X
	Discard	X	X
	Enable/disable anonymous comments		X
	Export all comments to CSV file	X	X
	Export all comments to TXT file	X	X
	Export pending comments to CSV	X	X
	Export pending comments to TXT file	X	X
	Require comments to be reviewed		X
	View community-wide comments	X	X

Feature	Task	Internal Feedback Explorer	External Feedback Explorer
Feedback files (configured with target)	Clear (remove data from Feedback database)		X
	Create*		X
	Open*		X
Reviewers (for approving comments)	Add		X
	Remove		X
Search phrases	Export to CSV file†	X	X
	Export to TXT file†	X	X
	View all search phrases used†	X	X
	View searches without results†	X	X
Synonyms (to enhance search results)	Create*†		X
Topic ratings	Export to CSV file	X	X
	Export to TXT file	X	X
	View all topic ratings	X	X
	View average rating per topic		X
Topics	Export list of visited topics to CSV		X
	Export list of visited topics to TXT		X
	View list of visited topics		X

* This feature cannot be performed in the internal Feedback Explorer, but it can be performed elsewhere in Flare.

† This feature is available if you are generating DotNet Help, WebHelp, or WebHelp Plus output formats only. It is not available for Microsoft HTML Help output.

Getting Additional Help

If you need additional help beyond the information provided in this manual, you can use any of the following resources.

Online Help

Open the online Help system in the Feedback Explorer and look for the information you need. You can do this in a variety of ways:

- **Use the Dynamic Help pane.** Select **Help>Dynamic Help** or press **CTRL+F3**. The Dynamic Help pane opens (by default on the right side of the interface) and will display the appropriate Help topics as you click in different areas of the workspace.
- **Use context-sensitive Help without the Dynamic Help pane.** Press **F1** to open the appropriate topic for the active area of the workspace.
- **Use the table of contents.** Select **Help>Contents** or press **CTRL+ALT+F1**. This opens the online Help TOC (by default on the left side of the interface). Navigate through the TOC books and pages to find the information you need. When you click a topic page, it displays in the workspace.
- **Use the index.** Select **Help>Index** or press **ALT+F1**. This opens the online Help index (by default on the left side of the interface). Navigate through the index to find keywords for the information you need. Also, open the Index Results window by selecting **Help>Index Results** or pressing **ALT+SHIFT+F2**. When you click a keyword in the index, the associated topic links are listed in the Index Results window. Click any of the links to open a specific topic.
- **Use the search feature.** Select **Help>Search** or press **CTRL+F1**. This opens the Help Search window (by default on the left side of the interface). Enter one or more keywords in the field and click **Search**. Links to topics containing those keywords are listed below. When you click a topic link, that topic displays in the workspace.
- **Use the glossary.** Select **Help>Glossary**. This opens the Help glossary (by default on the left side of the interface). Click any of the terms in the glossary to see a definition.

Knowledge Base

Browse the online Knowledge Base for articles covering the most common support issues. You can access the Knowledge Base from:

http://kb.madcapsoftware.com/

Peer-to-Peer Online Forums

Visit the online forums to learn from other MadCap Feedback users or share your own expertise. You can access the online forums from:

http://forums.madcapsoftware.com/

Contact MadCap Feedback Support

Contact the MadCap support team and get answers to your specific support issues. Simply go to:

http://madcapsoftware.com/support/feedbacksupport.aspx

Chapter 2

Getting Set Up with MadCap Feedback

Getting set up to use MadCap Feedback involves the following basic steps:

1. **Install MadCap Feedback Server** This step needs to be completed only if you have purchased the MadCap Feedback Server (as opposed to the MadCap Feedback Service). Provide your system administrator (or other responsible individual) with the instructions that are necessary for installing the software and other components. See "Installing MadCap Feedback Server" on page 15.
2. **Configure Feedback Server Admin** This step needs to be completed only if you have purchased the MadCap Feedback Server (as opposed to the MadCap Feedback Service). Provide your system administrator (or other responsible individual) with the instructions that are necessary for configuring the MadCap Feedback Server Admin. This includes the ability to test the settings, set up an SMTP server for email notifications, specify redirection Web pages for end users who register, and schedule automatic backups of the database and transaction log. See "Configuring the MadCap Feedback Server Admin" on page 18.
3. **Install external Feedback Explorer** Each user on your team who plans to use the external Feedback Explorer to view user comments and statistics should install this software locally. This includes managers who do not use Flare but want to be kept informed about user activity on the published Help output. A light version of the Feedback Explorer is built in to Flare. For more information and the differences between these versions of the Feedback Explorer, see "Feedback Explorer—Internal Versus External" on page 8.
4. **Obtain Feedback license(s)** You need a separate Feedback license for each Flare target that you want to track. After you purchase the MadCap Feedback Server or Service, you will be issued the appropriate Feedback license(s) from MadCap Software.

   EXAMPLE

   Let's say you have three authors and a manager on your team. You have a total of five different Flare projects, and from each of those projects, you and the other authors are generating two online targets. So as a team, you are producing a total of ten online outputs (two targets each from five projects). How many Feedback licenses are needed so that the authors and manager can track the user activity for all of those targets? In this case, you would need ten licenses (one for each output that you want to track).

   Note: It is possible to use the same Feedback license for different Flare targets. However, you must keep in mind that the statistics for the various targets will then become merged when you view them in the Feedback Explorer. You will not be able to determine which statistics resulted from which targets.

5. **Enable Feedback in Flare targets** After obtaining the necessary Feedback license(s), you need to enable the Feedback functionality in Flare. Each user on your team who will be generating output for a particular target needs to do this in his or her copy of the Flare project. Even if three different users will be working on the same Flare project, each of those authors enters the same Feedback license for the same target. For more, see the Flare online Help.
6. **Configure Flare target with external Feedback Explorer** See "Creating and Opening a Configured Feedback File" on page 23.
7. **Enable comments in the skin** If you want end users to be able to enter community-wide Feedback comments in the online output and view recent comments, you need to enable community-wide comments. This is done by opening the skin in Flare that is associated with the target and selecting the appropriate option(s). For steps, see the online Help in Flare.

Installing MadCap Feedback Server

If you purchase MadCap Feedback Server (as opposed to the MadCap Feedback Service), you need to install the Feedback Server Admin on the Microsoft Windows machine that will be used to host your Feedback data. Provide the individual who is responsible for the installation with these instructions.

Requirements

- Windows operating system (the following are supported):
  - Microsoft Windows 2000
  - Microsoft Windows 2000 Server
  - Microsoft Windows XP
  - Microsoft Windows Server 2003
- Microsoft .NET Framework 2.0 (free download from microsoft.com)
- SQL Server (the following are supported):
  - SQL Server 2005 Standard
  - SQL Server 2005 Express (free download from msdn.microsoft.com)
  - SQL Server 2000
- Microsoft Internet Information Services (IIS)
- ASP.NET 2.0
- MadCap Feedback Server Admin

Keys

When you purchase MadCap Feedback Server, you are issued two types of keys:

- **Feedback Server Key** You will be issued one key. Use this key to activate MadCap Feedback Server Admin on the machine hosting the Feedback data.
- **Feedback License Keys** You will be issued a set number of keys. Authors use one of these keys for each of their Flare targets that they want to track.

How to install MadCap Feedback Server Admin and other components

On the same machine to be used for hosting the Feedback, complete the following steps.

1. Make sure that Microsoft .NET Framework is installed.
2. Make sure that a supported version of SQL Server is installed.

> **Note:** If you do not have SQL Server installed, you can download SQL Server 2005 Express for free from msdn.microsoft.com.

3. Make sure that Microsoft IIS is installed. If it is not, use the following steps:
   a. Open the Control Panel. On many computers, you can do this by clicking **Start>Control Panel**.
   b. Double-click **Add or Remove Programs**.

      The Add or Remove Programs window opens.
   c. Click **Add/Remove Windows Components**.

      The Windows Components Wizard opens.
   d. Click the check box next to **Internet Information Services (IIS)** to add a check mark.
   e. Click **Next**.
   f. Click **Finish**.
3. Make sure that ASP.NET is installed. If it is not, use the following steps:
   a. Click **Start>Run**.

      The Run dialog opens.
   b. In the **Open** field, enter the following into the field:

      `C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727\aspnet_regiis -i`
   c. Click **OK**.

      A window opens, displaying the installation progress of ASP.NET. The window will close automatically when the installation finishes.

> **Note:** If you are using Windows Server 2003, please note that ASP.NET pages by default are prohibited in IIS. Therefore, you must set these pages to be allowed if you are running Windows Server 2003. To do this: (1) In Internet Information Services (IIS) Manager, select **Web Service Extensions** from the left pane; (2) in the right pane, make sure that **ASP.NET v2.0.50727** is set to **Allowed**. If it is not, select it and click the **Allow** button.

4. Insert the CD (for boxed version purchases) or download the MadCap Feedback Server Admin application from the link you received (for online purchases). Install the application.

   a. As soon as you complete the steps in the installation wizard and finish registering your copy of MadCap Feedback Server Admin, the Feedback Server Setup dialog opens. Click the down arrow in the **SQL Server** field and select your SQL Server.

   > **Note:** If you are using SQL Server 2000, you must make sure that Microsoft SQL Server 2005 Management Objects Collection is installed on the machine. If you do not have this installed, it can be downloaded from: http://www.microsoft.com/downloads/details.aspx?FamilyId=D09C1D60-A13C-4479-9B91-9E8B9D835CDC&displaylang=en. Please note that the Microsoft SQL Server 2005 Management Objects Collection requires Microsoft Core XML Services (MSXML) 6.0 and Microsoft SQL Server Native Client, which are available from the same link.

   b. (Optional) You can select a location for the database other than the default location provided. To do this, next to the **Database Location** field, click the **Browse** button. Then find and select the folder where you want the database to be stored.

   c. In the last field of the Feedback Server Setup dialog, select the Web site where you want MadCap Feedback Server installed. If you have not set up a specific Web site for this purpose, use the default.

   d. Click **OK**.

   The installation is complete and the MadCap Feedback Server Admin opens with three tabs shown (Basic, Advanced, Maintenance). You can use these tabs to configure the admin and set up maintenance tasks. (The Maintenance tab is used only for SQL Server 2005 Express.) See "Configuring the MadCap Feedback Server Admin" on page 18.

> **Note:** The machine used to host the Feedback data can also be used to host the author’s online Help output. However, this is not mandatory. The author may publish the output elsewhere.
>
> **Note:** If you are using Microsoft Windows XP, you may need to add IIS to the windows firewall in order for MadCap Feedback to function fully.

Configuring the MadCap Feedback Server Admin

After you install the MadCap Feedback Server Admin and the other necessary components, you can open the admin to do any of the following:

- Set up an SMTP server for various email notifications
- Test your settings
- Specify redirection Web pages for end users who register to enter Feedback comments

  The author can configure MadCap Feedback to require end users to register before submitting community-wide comments. After the end user registers, a specific Web page displays, depending on whether the registration was successful. You can use the Feedback Server Admin to specify the pages that end users see when successful or unsuccessful registrations occur.

- Schedule automatic backups of the database and transaction log

How to configure and maintain the MadCap Feedback Server Admin

1. Open the Feedback Server Admin application.
2. Select the **Basic** tab.

   Notice that the server and Web site that you selected during installation are populated.

3. In the **SMTP Server** section, enter the appropriate server, user name, and password. This is the server that will be used to support the Feedback comments that end users can submit, as well as to send emails for the user registration process. If you have an existing SMTP server (such as Microsoft Exchange) set up, you can use it for this purpose. In the **"From" Address** field, enter the email address that you want email notifications to contain in the "From" field.

   Note: If you elect to use Windows Integrated Authentication, leave the user name and password fields blank. Otherwise, if your SMTP server requires specific credentials, specify them in the provided fields.

4. (Optional) You can click the **Test** button next to any of the sections on this tab to make sure that SQL Server, Web site, and SMTP Server are working.

   If you click the Test button in the SMTP Server section, a dialog opens, letting you enter an email address for sending a test email.

5. Select the **Advanced** tab.

6. In the **Activation success page** field, enter the URL to the Web page that you want to be displayed if the registration process is successful.
7. In the **Activation failure page** field, enter the URL to the Web page that you want to be displayed if the registration process is unsuccessful.
8. Select the **Maintenance** tab.

> **Note:** The tasks on the Maintenance tab are applicable to SQL Server 2005 Express only. If instead you have SQL Server 2005 Standard, you can perform these remaining maintenance tasks in that application (see the steps on the following pages). If you are using SQL Server 2000, refer to its documentation for help on performing maintenance tasks.

9. In the **Location** field, enter the path where you want backups of the database and transaction log to be stored.
10. In the **Day & Time** field, specify whether you want the backups to be created daily or weekly. Also, specify the day and time when you want the backup process to run.

    In the SQL Server Express Maintenance Service section, the Start button should already be engaged. This enables backups to be created. Backups will be created for the database and the transaction log. In addition, this action "shrinks" the transaction log (which steadily grows over time).

How to set up a maintenance plan in SQL Server 2005 Standard

The following prerequisites, steps, and verification process are necessary only if you are working with SQL Server 2005 Standard. They are not necessary for SQL Server 2005 Express.

> **Note:** If you are using SQL Server 2000, refer to its documentation for help on performing maintenance tasks.

Prerequisites:

- Install Microsoft SQL Server Management Studio (not SQL Server Management Studio Express) and Integration Services:
    a. Run the SQL Server 2005 setup from the SQL Server 2005 installation disk.
    b. In **Feature Selection**, click **Advanced**.
    c. Click **Integration Services** and select **Will be installed on local hard drive**.
    d. Similarly, under **Client Components**, click **Management Tools** and select **Will be installed on local hard drive**.
    e. Click **Next** and finish the setup.
- Make sure SQL Server Agent is running and set to run automatically when Windows starts up:
    a. Select **Start>Programs>Microsoft SQL Server 2005>Configuration Tools>SQL Server Configuration Manager**.
    b. Select **SQL Server 2005 Services**.
    c. In the right pane, ensure that SQL Server Agent is running and starts on Windows startup:
        i. Right-click **SQL Server Agent** and select **Properties**.
        ii. Under the **Service** tab, make sure **Start Mode** is set to **Automatic**.
        iii. Click **OK**.
        iv. Right click **SQL Server Agent** again and select **Start**. If Start is grayed out but Stop is not, then it is already started.

Steps:

1. Open Microsoft SQL Server Management Studio:
    a. Select **Start>Programs>Microsoft SQL Server 2005>SQL Server Management Studio**.
    b. In the Connect to Server dialog, select your SQL Server from the **Server name** drop-down.
    c. Click **Connect**.

2. In the Object Explorer, expand **Management**.
3. Right-click **Maintenance Plans** and select **Maintenance Plan Wizard**.

   The Maintenance Plan Wizard opens.
4. Click **Next**.
5. On the **Select a Target Server** page, click in the **Name** field and enter a name for this maintenance plan (e.g., "Feedback Server Maintenance Plan").
6. Click **Next**.
7. On the **Select Maintenance Tasks** page, place a check mark next to:
   - **Shrink Database**
   - **Back Up Database (Full)**
   - **Back Up Database (Transaction Log)**
8. Click **Next**.
9. On the **Select Maintenance Task Order** page, use the **Move Up** and **Move Down** buttons to configure the three previous tasks in the following order from top to bottom:
   - **Back Up Database (Full)**
   - **Back Up Database (Transaction Log)**
   - **Shrink Database**
10. Click **Next**.
11. On the **Define Back Up Database (Full) Task** page, click the down arrow next to the **Databases** field and place a check mark next to **MadCapFeedbackServer**.
12. Click **OK**.
13. (Optional) Next to the **Folder** field, you can select the folder where the backup will be saved.
14. Click **Next**.
15. On the **Define Back Up Database (Transaction Log) Task** page, click the down arrow next to the **Databases** field and place a check mark next to **MadCapFeedbackServer**.
16. Click **OK**.
17. (Optional) Next to the **Folder** field, you can select the folder where the backup will be saved.
18. Click **Next**.
19. On the **Define Shrink Database Task** page, click the down arrow next to the **Databases** field and place a check mark next to **MadCapFeedbackServer**.
20. Click **OK**.
21. In the field labeled **Shrink database when it grows beyond**, enter 1 so that the database shrinking occurs when the database is larger than 1 MB.
22. Click **Next**.
23. On the **Select Plan Properties** page, click **Change** to define a maintenance schedule.

   The New Job Schedule dialog opens.

24. In the **Name** field, type a name for this schedule (e.g., "Feedback Server Maintenance Schedule").
25. From the **Occurs** drop-down menu, select **Daily**.
26. (Optional) In the field labeled **Occurs once at**, you can select a time you prefer the maintenance plan to be executed or use the default (12:00:00 AM). It is recommended that the maintenance plan run during a time when there is the least amount of traffic using the database.
27. Click **OK**.
28. In the Maintenance Plan Wizard, click **Next**.
29. (Optional) On the **Select Report Options** page, you can select to have a report written to a text file after each time the maintenance plan is executed. To do so, place a check mark next to **Write a report to a text file**.
30. (Optional) Next to **Folder location**, you can select the folder where the text file will be saved.
31. Click **Next**.
32. The Complete the Wizard page shows a summary of the options that you selected. Review them and click **Finish**.
33. The Maintenance Plan Wizard Progress page displays the progress of creating the maintenance plan. After it is completed, click **Close**.

Verify the maintenance plan:

1. Open Microsoft SQL Server Management Studio
2. In the Object Explorer, expand **Management**.
3. Expand **Maintenance Plans**.
4. Right-click **Maintenance Plans** and select **Refresh** to ensure that all maintenance plans are displayed. The new maintenance plan should appear in the list.
5. On the same level as **Maintenance Plans**, expand **SQL Server Agent**.
6. Expand **Jobs**.
7. Right-click **Jobs** and select **Refresh** to ensure that all jobs are displayed. A new job should appear in the list with the same name as the maintenance plan you created.
8. To test executing the maintenance plan, right-click the job and select **Start job**.

   A dialog appears, displaying the progress and status of the job. All statuses should show "Success."
9. Using Windows Explorer, browse to the various locations you chose to save the database backup, transaction log backup, and report text file. Verify that each file exists.

Creating and Opening a Configured Feedback File

One of the first tasks that must be performed in the Feedback Explorer is to create or open a file that is configured with a target in MadCap Flare. You can initialize this task from the Feedback Explorer or from within Flare. It is easiest to create and open the initial Feedback file from within Flare. The reason for this is that you only need to enter your Feedback license once. After entering the license key in Flare's Target Editor, simply click the button labeled **Configure with Feedback Explorer Application**.

However, some individuals may want to perform this task from the Feedback Explorer. For example, some people (such as managers) may not work in MadCap Flare, but want to track user activity in the author's online Help files.

Configuring a Flare target from the Feedback Explorer is a one-time setup process where the Feedback file is created and opened. After this initial setup, you can open that Feedback file whenever you want to view or take action on user activity. Following are steps for creating the initial configured Feedback file from the external Feedback Explorer, followed by steps for opening an existing configured Feedback file. For more information about creating the configuration file from Flare, see the Flare online Help.

How to create the initial configured Feedback file

1. Do one of the following:
   - In the Standard toolbar, click .
   - Select **File>New**.
   - Press **CTRL+N** on your keyboard.

   The New Local Target dialog opens.
2. In the **Feedback Server** field, enter the path to the server hosting the data. If you purchased the MadCap Feedback Service (as opposed to the MadCap Feedback Server), enter `madcap`, which maps to feedbackserver.madcapsoftware.com.

   > **Note:** It is highly recommended that you purchase an SSL certificate and install it on your Web server. MadCap Feedback uses encryption for certain processes, which helps to ensure that the data transfer is secure. If you have an SSL certificate installed on your Web server, make sure you begin the path to the server with https://.

3. In the **Feedback Key** field, enter the Feedback license that you have been issued.
4. Click **OK**. The Feedback file (with an .fbconf extension) opens in the Feedback Admin. The file has no name until you save it.
5. Click  to save your work.
6. In the Save As dialog, enter a name for the new Feedback file (perhaps naming it after the Flare target or project).
7. Click **Save**.
8. In Flare, open the target and enter the same Feedback license that you entered for the Feedback file. This step does not apply to you unless you are an individual responsible for working in the Flare project. If you are a manager who simply wants to view the user activity, ignore this step.

How to open a configured Feedback file

1. Do one of the following:

   - In the Standard toolbar, click .

     OR

   - Select **File>Open**.

     OR

   - Press **CTRL+O** on your keyboard.

2. Locate and double-click the Feedback file (.fbconf extension) that you want to open.

> **Note:** By default, Feedback files are stored in a folder labeled "My Feedback Admin," which is automatically created for you and placed in your My Documents folder.

Clearing the Feedback Database

You can wipe out your Feedback database so that all data (including all comments, topic ratings, and search queries) are removed from it. You might use this button, for example, if you have been testing the Feedback Service and want to publish your output without users seeing your test data.

How to clear the Feedback database

1. Open the Feedback file.
2. In the local toolbar of the Feedback Admin, click 

.
3. In the dialogs that open, click **Yes**.

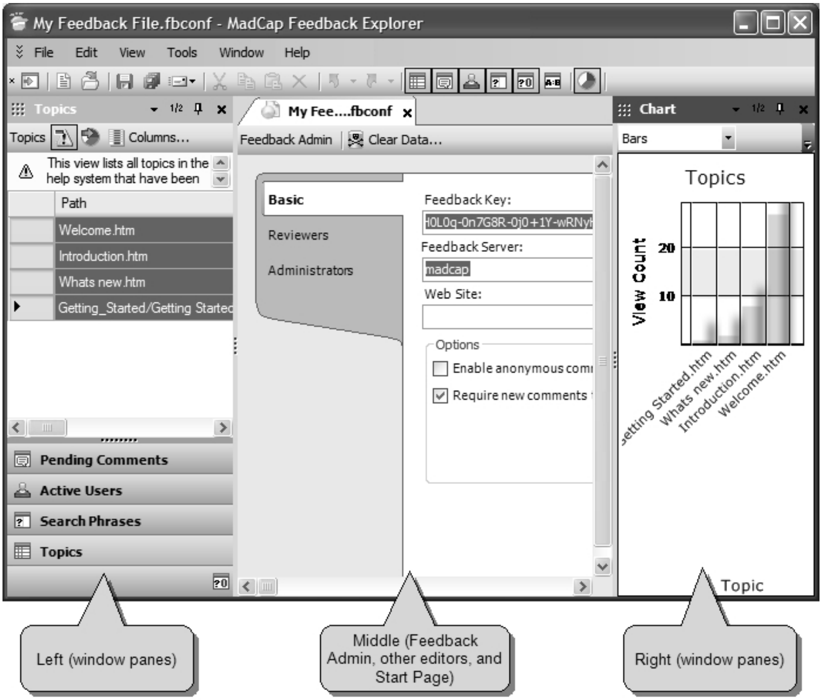
   The next time you launch the Feedback Explorer and open that Feedback file, the data will be gone.

Chapter 3

Touring the Feedback Explorer Workspace

The Feedback Explorer's user interface consists of three major sections:

- **Left** The left side of the interface is the default location for many different window panes (e.g., Pending Comments, Search Phrases), which can be used to view and work with information gathered from user activity on your online output.
- **Middle** The large middle section of the interface is the default location for the main editor in the Feedback Explorer (the Feedback Admin), which is used to configure the way that MadCap Feedback works. This middle section also displays other editors and the Start Page.
- **Right** The right side of the interface (like the left side) is the default location for additional window panes (e.g., Dynamic Help window, Chart window).



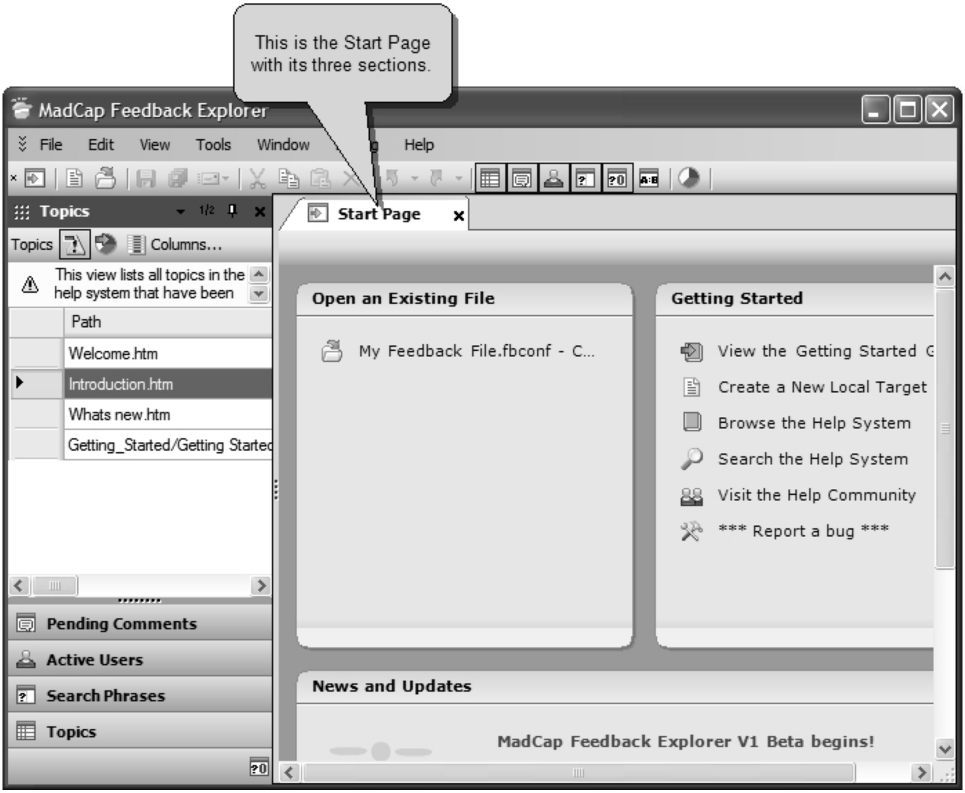
As mentioned, the three main areas of the interface are the *default* locations for these many elements. However, you have the flexibility in the Feedback Explorer to close or move elements around as you like, so it is not mandatory that every window or editor remain permanently in its default location.

In addition to the three main areas mentioned, the Feedback Explorer's interface also consists of menus and toolbars, which also support the tasks that you perform.

Following are overviews of the different areas of the Feedback Explorer interface, highlighted by some of the most important elements that you will encounter as you work in the Feedback Explorer.

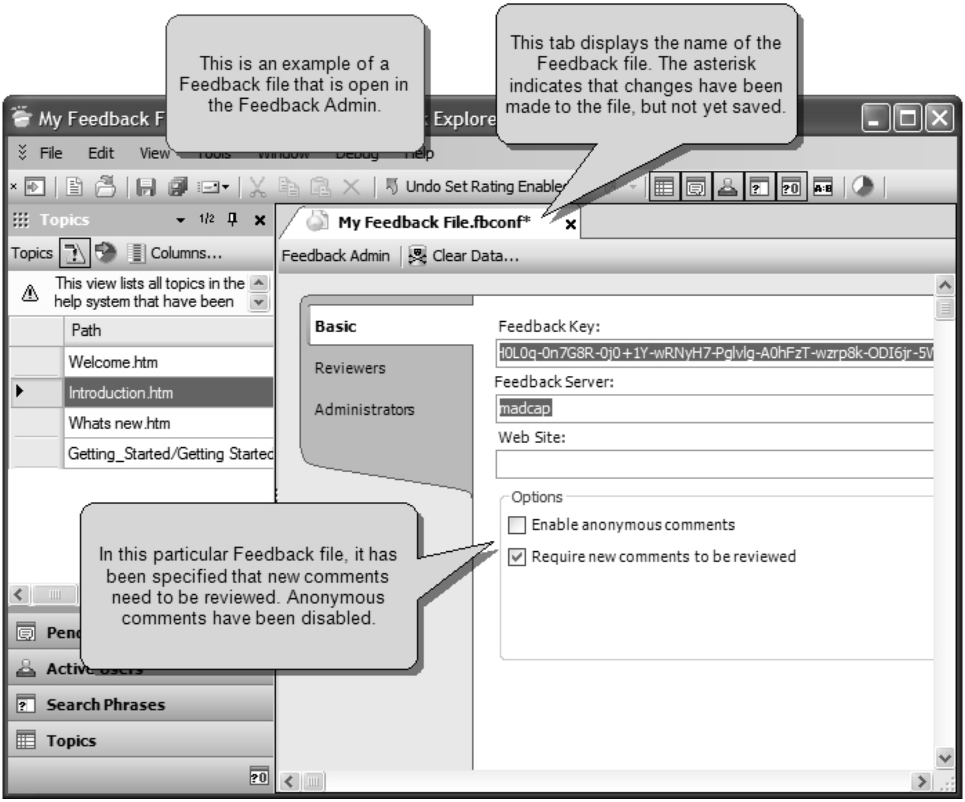
Start Page

The Start Page is a handy window that displays when you first launch the Feedback Explorer and remains open unless you close it. This window consists of three sections (Open an Existing File, Getting Started, and News and Updates), which contain links to high-level tasks and information.



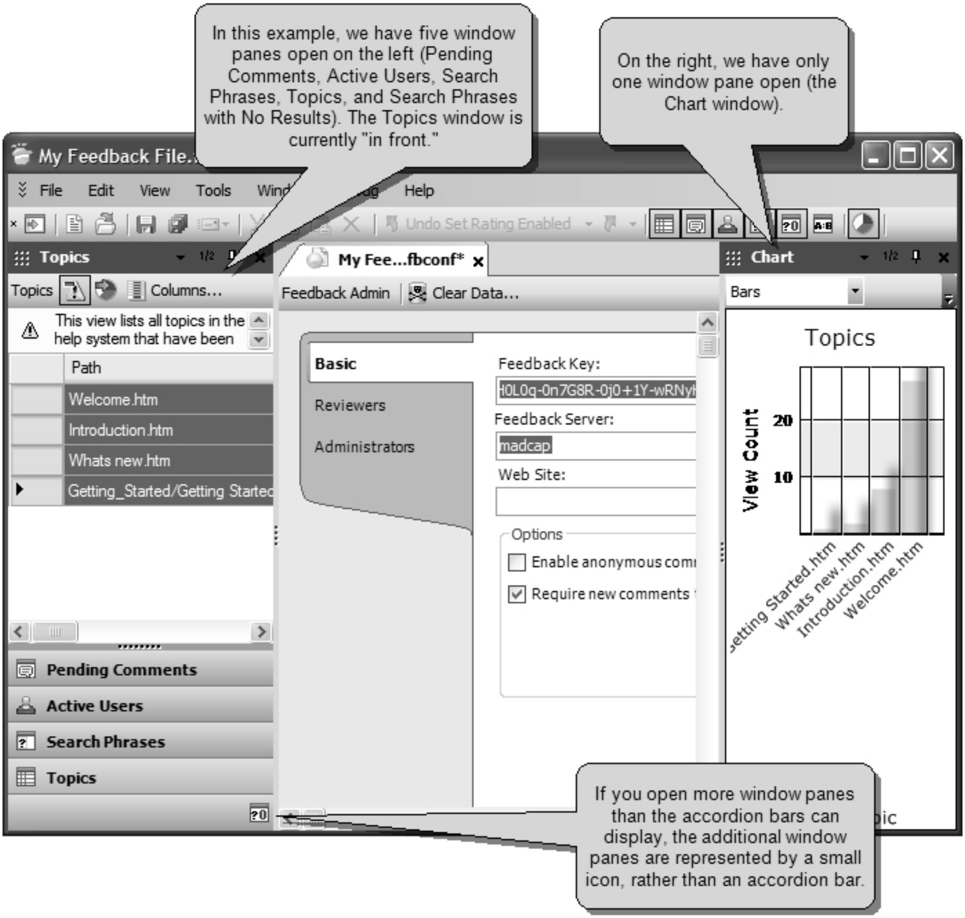
Feedback Admin

The Feedback Admin serves as the main control panel for configuring a Feedback file, which acts as the connector between the Feedback Explorer and the Flare target to be tracked. This editor is used to perform tasks such as enabling anonymous comments, requiring new comments to be reviewed, adding administrators, and adding reviewers.



Window Panes

The Feedback Explorer has numerous window panes in the interface that are used for a variety of purposes, such as viewing user comments, search phrases entered, and topic ratings. Most of these panes are located by default on the left side of the workspace, whereas other panes (such as the Chart window) are located on the right side. If more than one window pane is open on either side, the panes are organized in an accordion structure. This means that they are stacked on top of each other, with the active window pane displayed "in front" of the other panes. Accordion bars for each window pane are located at the bottom, and you can click any bar to bring that particular window pane "in front" so that you can use it.

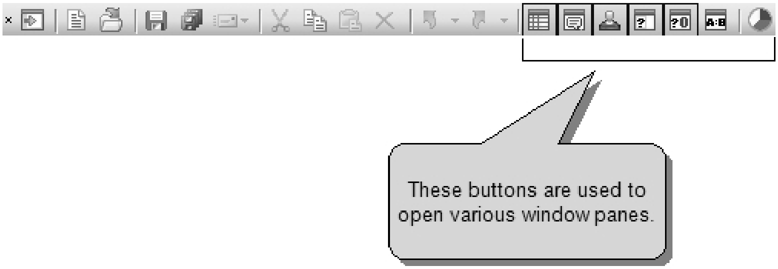


Menus

The Feedback Explorer's user interface includes a menu bar at the top of the program window, containing several menu options. Of particular importance is the "View" menu, which is used to open the many different window panes that you will use to see and work with user statistics and information.

Standard Toolbar

Tools in the Standard toolbar let you perform basic functions, such as Save, Cut, Copy, Paste, Undo, and Redo. There are also shortcut buttons for opening the many different window panes in the interface. To see this toolbar, select **View>Toolbars>Standard**.



Customizing the Feedback Explorer Workspace

One of the benefits of the Feedback Explorer's user interface is that it is flexible and easy to customize to meet your needs. Following are some of the ways you can customize the workspace.

Moving, Docking, and Floating Window Panes

Simply because a window pane is attached to the left or right side of the program window by default, this does not mean it has to stay there.

- **Moving windows** You can move a window pane wherever you want it by clicking the "Drag Pane" section (located in the upper-left corner of the window pane) and dragging the window where you want it.
- **Floating windows** If you drop the window pane at a random location in the program window, it becomes a "floating" window. (You can also create a floating window by clicking in the element and selecting **Window>Floating**.)
- **Docking windows** "Docking" a window means to "attach it" to an edge of the program window. To do this, move the floating window pane by clicking in the title bar of the window pane, drag it to the edge where you want to dock it, and drop it onto one of the blue arrows or bulls eyes that appear in the interface.

Auto-Hiding Window Panes

In the top-right corner of every window pane, you will see a small button that looks like a pin . If you click this button, the window pane is hidden (or "pinned" to the edge of the program window). However, you can still see the title of the window pane along the edge of the program window. When you hover the mouse over the title, the window pane temporarily displays again until you move the mouse off the window pane. Click the button again to "un-pin" the window pane.

Resizing User Interface Elements

You can easily resize the program window, dialog windows, and floating window panes in the Feedback Explorer by clicking the edge of the element and dragging the mouse to the desired size. You can also resize drop-down menus in the same way.

Customizing Column Information

In certain windows and editors in the Feedback Explorer (e.g., Search Phrases window, Topics window), information is presented in columns. You can configure the way that these columns are displayed. For example, you can hide or show certain columns, set a background color for a column, or increase the width for a column. You can also specify which column information should be included when creating a chart from the statistics in the window.

Window Layouts

When you move window panes or editors around in the interface, the configuration (or "layout") of the workspace is changed. You can do several things with layouts, including the following:

- **Save** You can save different layouts of the interface, in case you want to use them for different purposes.
- **Auto-save** You can automatically save the layout of the workspace when you exit the Feedback Explorer. The next time you launch the application, that same layout will be displayed.
- **Select** You can quickly change the configuration of your workspace by selecting a window layout that you have saved previously.
- **Reset** You can return the workspace configuration to the original layout that you saw when you first installed and launched the Feedback Explorer.
- **Reload** You can return the workspace to the saved configuration of the layout. In other words, if you are working in a particular layout and have opened different interface elements or moved interface elements around, you can select this option to go back to the saved configuration.
- **Lock** You can freeze a window layout so that the window panes and editors cannot be moved floated or docked to different areas of the interface.
- **Delete** You can open the Manage Window Layouts dialog, which lets you select or delete an existing layout.

How to save a window layout

1. Configure the workspace how you want it.
2. Select **Window>Layouts>Save Window Layout As**.
3. In the Rename Window Layout dialog, enter a name for the layout.
4. Click **OK**.

How to auto-save a window layout

- Select **Window>Layouts>Auto-save Layout**.

How to select a saved window layout

- Select **Window>Layouts>Select Layout>[Name of Layout]**.

How to reset the window layout

- Select **Window>Layouts>Reset Window Layout**.

How to reload the window layout

- Select **Window>Layouts>Reload Window Layout**.

How to lock a window layout

- Select **Window>Layouts>Lock Window Layout**.

How to delete a window layout

1. Select **Window>Layouts>Layouts**.

   The Manage Window Layouts dialog opens.

2. Select the layout that you want to delete.
3. Click **Delete**.
4. Confirm the deletion by clicking **OK**.
5. Click **Close**.

Chapter 4

Features

The Feedback Explorer offers an extensive list of features to assist you in working with MadCap Feedback, including the following:

Administrators and Reviewers

Topics

Topic Ratings

Comments

Search

Charts

Exporting

Administrators and Reviewers

You can set up a Feedback file so that you and other individuals are notified when certain user activity takes place on your Help output.

- **Adding administrators** You can specify individuals who should be emailed when the following activities take place: users submit new community-wide comments, the status for a community-wide comment is changed, or the Feedback database is cleared. An administrator might be an individual such as a manager or documentation leader who will not necessarily take action on user activity but still needs to be kept informed. See "How to add administrators to the email list" on page 35.
- **Adding reviewers** You can specify individuals who should be emailed when users submit new community-wide comments in the published online output. In addition to yourself, reviewers can be other writers on your documentation team. These individuals will be emailed only if you have specified that comments require review before being published (see page 41). They can then open the Feedback Explorer to take action on pending comments (e.g., accepting, discarding, hiding) as necessary. See "How to add reviewers to the email list" on page 35.

> **Note:** It is not mandatory that you add reviewers to this list. It is simply an activity that helps speed the process of accepting new comments because it notifies the appropriate individuals when action is needed for pending comments. Anyone who has the Feedback Explorer installed with the appropriate Feedback license key will be able to take action on pending comments, even if they are not added to the reviewers notification list.

How to add administrators to the email list

1. Open the Feedback file.
2. In the Feedback Admin, select the **Administrators** tab.
3. Enter the email addresses of the individuals who will be administrators for the associated Flare output. Use a separate line for each email address, pressing **Enter** after you add an address.
4. Click  to save your work.

How to add reviewers to the email list

1. Open the Feedback file.
2. In the Feedback Admin, select the **Reviewers** tab.
3. Enter the email addresses of the individuals who will be reviewers for the associated Flare output. Use a separate line for each email address, pressing **Enter** after you add an address.
4. Click  to save your work.

Topics

You can use the Topics window to view a list of all the topics that users have opened in your output. This includes a count of how many times each topic has been opened, as well as its average rating from users and the number of comments that have been submitted.

How to view topics opened by users

1. Open the Feedback file.
2. Open the Topics window. (If it is not already displayed in the interface, select **View>Topics**.)

   You can see information on the topic path, view count, comment count, average rating, and rating count.

Note: You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

Topic Ratings

With MadCap Feedback, users can give a rating to a topic, ranking it from not helpful to very helpful, using a sliding scale from 0 to 100 (for DotNet Help) or selecting from one to five stars (for Microsoft HTML Help, WebHelp, and WebHelp Plus). You can then view these ratings (which are displayed as a numerical score from 0 to 100) and make adjustments to the topics as necessary. They work hand-in-hand with author-only comments, which can be entered at the same time that a topic is rated.

- **Rating topics (users)** Learn how users submit ratings for topics in your online output. See "How End Users Submit Topic Ratings" on page 37.
- **Viewing topic ratings** After users enter ratings for topics, you can view them in the Feedback Explorer. See "Viewing Topic Ratings" on page 38.

How End Users Submit Topic Ratings

The following steps describe how end users submit topic ratings in the various output formats: DotNet Help, Microsoft HTML Help, WebHelp, and WebHelp Plus.

How end users submit topic ratings in DotNet Help output

1. In the DotNet Help output, the end user opens a topic.
2. In the toolbar, the end user clicks the rating button .
3. In the Rate Topic dialog, the end user clicks and drags the rating bar to the left or right.
4. (Optional) The end user can also enter an author-only comment in the dialog.
5. The end user clicks the **Submit** button.

How end users submit topic ratings in Microsoft HTML Help output

1. In the Microsoft HTML Help output, the end user opens a topic.
2. In the toolbar directly above the topic, the end user clicks the rating button .
3. In the Topic Rating popup, the end user clicks on the stars to provide a rating for the topic (giving the topic anywhere from one to five stars).
4. (Optional) The end user can also enter an author-only comment in the area below.
5. The end user clicks the **Submit** button.

How end users submit topic ratings in WebHelp or WebHelp Plus output

1. In the WebHelp or WebHelp Plus output, the end user opens a topic.
2. In the toolbar, the end user clicks the rating button .
3. In the Topic Rating popup, the end user clicks on the stars to provide a rating for the topic (giving the topic anywhere from one to five stars).
4. (Optional) The end user can also enter an author-only comment in the area below.
5. The end user clicks the **Submit** button.

Viewing Topic Ratings

In the external Feedback Explorer, you can see each rating submitted for a topic, as well as the average rating for a topic.

How to view all ratings for a topic

1. Open the Feedback file.
2. Open the Topics window. (If it is not already displayed in the interface, select **View>Topics**.)

   You can see information on the topic path, view count, comment count, average rating, and rating count.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Double-click the topic whose ratings you want to view.

   The Topic View window opens.

4. Select the **Rating** tab.

   All ratings and associated author-only comments for the topic are displayed in the tab. Individual ratings range from a score of 0 to 100, with 100 being the best rating.

How to view the average rating for a topic

1. Open the Feedback file.
2. Open the Topics window. (If it is not already displayed in the interface, select **View>Topics**.)

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Resize the Topics window, or use the scroll bar at the bottom of the window to see the Avg Rating column.

   Individual ratings range from a score of 0 to 100, with 100 being the best rating. This column shows the average of all ratings combined.

Comments

Users can enter comments on your Help topics. There are two types of comments: community-wide and author-only.

- **Community-wide comments** A reader can enter a comment that may be viewed (and replied to) by all other users viewing the Help.
    - **Controlling which comments are added to the output** As the author, you have control over whether new community-wide user comments should be reviewed before they are displayed in the online output. If you specify that all incoming comments require review, those comments will have Pending status until you take action on them (e.g., accepting, discarding, hiding). If you specify that reviewing comments is not necessary, all incoming comments will automatically move to Accepted status and become immediately visible in your online output. You can always change the status of a community-wide comment, thereby affecting whether it is visible and to whom. See "How to specify whether new comments need to be reviewed" on page 41.
    - **Enabling anonymous comments** When users submit community-wide comments, they may be required to register, providing information such as name, user name, and email address. However, you can set up a Feedback file so that anonymous users will be accepted. In that case, users will not need to register; instead, they simply enter any user name when submitting a comment. See "How to enable anonymous comments" on page 41.
    - **Entering community-wide comments (users)** Learn how users submit these types of comments from your online output. See "How End Users Submit Community-Wide Comments" on page 42.
    - **Viewing community-wide comments** After users enter community-wide comments, you can view them in the Feedback Explorer. This can be done from the Topic View window (which can be accessed by selecting **View>Topics** and then double-clicking a topic listed). On the Comments tab, all community-wide comments are displayed, including the status of each (e.g., Accepted, Pending Review, Hidden). You can also view pending community-wide comments. See "How to view all community-wide topic comments" on page 45 and "How to view pending community-wide topic comments" on page 45.
    - **Accepting pending comments** If you set up MadCap Feedback so that new community-wide comments require approval before being added to the online output, those comments move to Pending status by default. Therefore, you must accept a comment before it is added to the online output to be viewed by everyone. Even after you accept a comment, you can later change your mind and assign a different status to it (Hidden, Pending Review) or discard it any time you want. See "How to accept pending community-wide comments" on page 46.
    - **Hiding comments** If you do not want a community-wide comment to be visible to all users in the community, but you also do not want to delete it from the system, you can change its status to Hidden. That way, you can continue to access the comment in the Feedback Explorer, but end users will not see it in the online output. You can assign a different status to it (Accepted, Pending Review) or discard it any time you want. See "How to hide community-wide comments" on page 47.

- **Setting comments to Pending status** If you set up MadCap Feedback so that new community-wide comments require approval before being added to the online output, those comments move to Pending status by default. This means that the comment is visible only to you and the end user until you accept it. If at any time the comment has a different status than Pending (i.e., Hidden, Accepted), you can send it back to the Pending Comments window by applying the Pending Review status to it. See "How to set comments to Pending status" on page 47.
- **Discarding comments** If you do not want to keep a community-wide comment in the system, you can permanently delete it at any time. After you do this, you will no longer be able to access the comment. See "How to discard community-wide comments" on page 48.
- **Replying to community-wide comments** After you receive community-wide comments from users, you can reply to them. You can either obtain the individual's email address and send a private response, or you can reply to the user from the online output so that everyone in the community sees your response. See "How to reply to a comment privately" on page 48 and "How to reply to a comment publicly" on page 49.
- **Viewing active users** You can view a list of active users for your online Help. In other words, the list shows the users who have registered and submitted at least one community-wide comment. See "How to view active users" on page 49.

> **Note:** If you want end users to be able to enter community-wide Feedback comments in the online output and view recent comments, you need to enable community-wide comments. This is done by opening the skin in Flare that is associated with the target and selecting the appropriate option(s). For steps, see the online Help in Flare.

- **Author-only comments** An end user can enter a comment that is intended for the Help author only. Each author-only comment is tied to a particular topic and works hand-in-hand with the topic ratings feature. Whereas community-wide comments can be seen by everyone in the output, an author-only comment can be accessed only from the Feedback Explorer. Therefore, only the Help author can view it.
  - **Entering author-only comments (users)** Learn how users submit these types of comments from your online output. See "How End Users Submit Author-Only Comments" on page 44.
  - **Viewing author-only comments for a particular topic** After a user enters an author-only comment, you can view it in the Feedback Explorer. See "How to view author-only topic comments" on page 46.

How to specify whether new comments need to be reviewed

1. Open the Feedback file.
2. In the Feedback Admin, select the **Basic** tab.
3. Click the check box labeled **Require new comments to be reviewed** so that it contains a check mark.
4. Click to save your work.

How to enable anonymous comments

1. Open the Feedback file.
2. In the Feedback Admin, select the **Basic** tab.
3. Click the check box labeled **Enable anonymous comments** so that it contains a check mark.
4. Click to save your work.

How End Users Submit Community-Wide Comments

The following steps describe how end users submit community-wide comments in the various output formats: DotNet Help, Microsoft HTML Help, WebHelp, and WebHelp Plus.

How end users submit community-wide comments in DotNet Help output

1. In the DotNet Help output, the end user opens a topic.
2. The end user either clicks in the local toolbar or selects **Help>Topic Comments**.

   The Topic Comments window opens.
3. In the window, the end user clicks the **Add Comment** button.
4. If it is the user's first time submitting a community-wide comment, the user may be required to complete the registration process, providing information such as username, name, email address, and more.
5. In the Add Comment dialog, the end user provides a subject and enters a comment.
6. The end user clicks the **Submit** button.

How end users submit community-wide comments in Microsoft HTML Help output

1. In the Microsoft HTML Help output, the end user opens a topic.
2. At the bottom of the topic, the end user clicks the **Add Comment** button .
3. If it is the user's first time submitting a community-wide comment, the user may be required to complete the registration process, providing information such as username, name, email address, and more.
4. In the Add Comment dialog, the end user provides a subject and enters a comment.
5. The end user clicks the **Submit** button.

How end users submit community-wide comments in WebHelp or WebHelp Plus output

1. In the WebHelp or WebHelp Plus output, the end user opens a topic.
2. The end user selects the **Topic Comments** bar.

   If you specify that comments should also be displayed at the bottom of each topic, users do not need to click the Topic Comments bar. For more information, see the Flare online Help.

3. The end user does one of the following:

   - In the Topic Comments pane, the end user clicks the **Add Comment** button .

     OR

   - If you specified that comments should be displayed at the bottom of each topic, the end user clicks the **Add Comment** button at that location.

4. In the Topic Comments pane, the end user clicks the **Add Comment** button .
5. If it is the user's first time submitting a community-wide comment, the user may be required to complete the registration process, providing information such as username, name, email address, and more.
6. In the Add Comment dialog, the end user provides a subject and enters a comment.
7. The end user clicks the **Submit** button.

How End Users Submit Author-Only Comments

The following steps describe how end users submit author-only comments in the various output formats: DotNet Help, Microsoft HTML Help, WebHelp, and WebHelp Plus.

How end users submit author-only comments in DotNet Help output

1. In the DotNet Help output, the end user opens a topic.
2. In the toolbar, the end user clicks the rating button .
3. In the Rate Topic dialog, the end user enters a comment.
4. (Optional) The end user can also drag the rating bar from left to right to provide a rating for the topic.
5. The end user clicks the **Submit** button.

How end users submit author-only comments in Microsoft HTML Help output

1. In the Microsoft HTML Help output, the end user opens a topic.
2. In the toolbar directly above the topic, the end user clicks the rating button .
3. In the Topic Rating popup, the end user clicks on the stars to provide a rating for the topic (giving the topic anywhere from one to five stars).
4. The end user enters a comment in the area below.
5. The end user clicks the **Submit** button.

How end users submit author-only comments in WebHelp or WebHelp Plus output

1. In the WebHelp or WebHelp Plus output, the end user opens a topic.
2. In the toolbar, the end user clicks the rating button .
3. In the Topic Rating popup, the end user clicks on the stars to provide a rating for the topic (giving the topic anywhere from one to five stars).
4. The end user enters a comment in the area below.
5. The end user clicks the **Submit** button.

Viewing Topic Comments

The following steps describe how to view community-wide and author-only comments in the Feedback Explorer. For community-wide comments, this includes steps for viewing all such comments, as well as steps for viewing pending comments.

How to view all community-wide topic comments

1. Open the Feedback file.
2. Open the Topics window. (If it is not already displayed in the interface, select **View>Topics**.)

   You can see information on the topic path, view count, comment count, average rating, and rating count.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Double-click the topic whose comments you want to view.

   The Topic View window opens.

4. Select the **Comments** tab.

   All community-wide comments for the topic are displayed in the tab.

5. You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.

How to view pending community-wide topic comments

1. Open the Feedback file.
2. Open the Pending Comments window. (If it is not already displayed in the interface, select **View>Pending Comments**.)

   The pending comments are listed in the bottom portion of the window.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.

How to view author-only topic comments

1. Open the Feedback file.
2. Open the Topics window. (If it is not already displayed in the interface, select **View>Topics**.)

   You can see information on the topic path, view count, comment count, average rating, and rating count.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Double-click the topic whose comments you want to view.

   The Topic View window opens.
4. Select the **Rating** tab.

   All ratings and associated author-only comments for the topic are displayed in the tab.
5. You can view the actual comment text by double-clicking the rating/comment row, which opens the Properties dialog for ratings and author-only comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.

How to accept pending community-wide comments

1. Open the Feedback file.
2. Open the Pending Comments window or Topic View window (Comments tab).
   - To open the Pending Comments window, select **View>Pending Comments**.
   - To open the Topic View window, open the Topics window (**View>Topics**). Then double-click the appropriate topic. Select the **Comments** tab.

   The comments are listed in the bottom portion of the window.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Select a comment.

   You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.
4. In the local toolbar, click the down arrow in the **Set comment status** field and select **Accepted**.
5. Click **Yes**.

   The comment is removed from the Pending Comments window. When you or any users open the online output, that comment will be displayed.

How to hide community-wide comments

1. Open the Feedback file.
2. Open the Pending Comments window or Topic View window (Comments tab).
   - To open the Pending Comments window, select **View>Pending Comments**.
   - To open the Topic View window, open the Topics window (**View>Topics**). Then double-click the appropriate topic. Select the **Comments** tab.

   The comments are listed in the bottom portion of the window.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Select a comment.

   You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.
4. In the local toolbar, click the down arrow in the **Set comment status** field and select **Hidden**.
5. Click **Yes**. The comment is not visible to any end users, but you can continue to view it in the Topic View window.

How to set comments to Pending status

1. Open the Feedback file.
2. Open the Topics window (**View>Topics**).
3. Double-click the appropriate topic. The Topic View window opens.
4. Select the **Comments** tab. The comments are listed in the bottom portion of the window.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

5. Select a comment.

   You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.
6. In the local toolbar, click the down arrow in the **Set comment status** field and select **Pending Review**.
7. Click **Yes**. The comment is added to the Pending Comments window.

How to discard community-wide comments

1. Open the Feedback file.
2. Open the Pending Comments window or Topic View window (Comments tab).
   - To open the Pending Comments window, select **View>Pending Comments**.
   - To open the Topic View window, open the Topics window (**View>Topics**). Then double-click the appropriate topic. Select the **Comments** tab.

   The comments are listed in the bottom portion of the window.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Select a comment.

   You can view the actual comment text by double-clicking the comment row, which opens the Properties dialog for community-wide comments. Alternatively, you can drag the divider to the right of the comment column in the window to see more of the text.

4. In the local toolbar, click the **Discard selected comments** button .
5. Click **Yes**.

   The comment is removed from the window and from the system.

How to reply to a comment privately

1. View the comment, and make note of the individual's user name.

   See "How to view all community-wide topic comments" on page 45 or "How to view pending community-wide topic comments" on page 45.

2. View the list of active users (individuals who have registered and submitted at least one comment).

   See "How to view active users" on page 49.

3. In the Active Users window, find the user and the corresponding email address in the list.

   You may need to drag the divider to the right of the E-Mail field to see the entire address.

4. Send the user an email with your response to the comment.

> **Note:** In order to obtain the email addresses of your readers, make sure that anonymous comments are not enabled in the Feedback Admin.

How to reply to a comment publicly

1. If necessary, accept the comment from the reader so that it displays in your online output.

   See "How to accept pending community-wide comments" on page 46.

2. Open the topic in your published online output (just as your end users would).
3. Find and select the comment to which you want to reply.
   - **DotNet Help** Select **Help>Topic Comments**.
   - **HTML Help** The comments are already displayed at the bottom of the topic.
   - **WebHelp or WebHelp Plus** Select the **Topic Comments** bar.
4. Click the **Reply to Comment** button.
   - **DotNet Help** You may need to drag the divider in the window to see this button, which is displayed in the local toolbar.
   - **HTML Help, WebHelp, or WebHelp Plus** The button looks like this: .

   The Reply to Comment dialog opens.

5. Enter a subject and a comment.
6. Click **Submit**.
7. If you have set up comments so that they require approval, you need to open the Feedback Explorer and approve your own comment.

   The comment will then be displayed under the original comment for all of your readers to see.

How to view active users

1. Open the Feedback file.
2. Open the Active Users window. (If it is not already displayed in the interface, select **View>Active Users**.)

   The active users are listed in the bottom portion of the window.

Note: You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

Search

With MadCap Feedback, you can determine how readers are using search in your online output. This helps you answer questions such as: What are they looking for? What are they finding? And more importantly, what are they unable to find? You can use the Feedback Explorer to view all used search phrases, as well as searches where no results were returned to the user.

- **Viewing used search phrases** You can see statistics on all search phrases used, including the number of searches performed for each term and the number of results returned for users each time. This lets you know the information that users are seeking most often. You can then make the necessary adjustments to your project, such as adding more details to the appropriate topics. See "How to view used search phrases" on page 50.
- **Viewing searches without results** You can see statistics on the search phrases for which users did not find results, including the number of searches performed for each term. See "How to view searches without results" on page 51.
- **Creating synonyms** If users enter search phrases in your online output and those phrases are not returning results, this does not need to be the end of the story. You can make improvements to your output so that, in the future, users are able to find the search results they need. One way to make an enhancement is to add the information that your users are looking for (if that information does not yet exist in your Flare project). Another way to enhance your output is to create synonyms for search phrases. See "How to create synonyms" on page 51.

  You can create synonyms within the Flare project or within the external Feedback Explorer. It is not mandatory that you have MadCap Feedback in order to use synonyms in Flare output, but using MadCap Feedback makes it much easier to determine which words require synonyms based on the search results of your users. Using the external Feedback Explorer to create synonyms is appealing because the synonyms become immediately available for users searching in your output (without needing to republish the output). Be aware, however, that creating synonyms in the external Feedback Explorer works for the Feedback output as long as you continue to publish output to the same server. If you create synonyms in the external Feedback Explorer, it is recommended that you also create those synonyms at the source (i.e., within the Flare project), in case you ever publish to a different server. The easiest method is to export your synonyms to that Flare project. See "How to export synonyms" on page 59.

Note: This feature is available if you are generating DotNet Help, WebHelp, or WebHelp Plus output formats only. It is not available for Microsoft HTML Help output.

How to view used search phrases

1. Open the Feedback file.
2. Open the Search Phrases window. (If it is not already displayed in the interface, select **View>Search Phrases**.)

   You can see statistics on all search phrases used, including the number of searches performed for each term and the number of results returned for users each time. This lets you know the information that users are seeking most often. You can then make the necessary adjustments to your project, such as adding more details to the appropriate topics.

How to view searches without results

1. Open the Feedback file.
2. Open the Search Phrases with No Results window. (If it is not already displayed in the interface, select **View>Search Phrases with no results**.)

   You can see statistics on the search phrases for which users did not find results, including the number of searches performed for each term.

How to create synonyms

1. Open the Feedback file.
2. Select **View>Synonyms**.

   The Synonyms Editor opens.

3. You can create directional synonyms, and you can create synonym groups.

   Directional synonym This is a synonym that works in one direction (Word→Synonym). It is a useful method if readers enter a search term that is not contained in your project, but you have a similar word that is contained in the project. It works like this... In the Synonyms Editor, you enter the word that is not producing search results (because it is NOT contained in your project content). Next to it, you enter a synonym—a word that will produce search results (because it IS contained in your project content). When users enter the original word again in future searches, topics containing the synonym are found.

   EXAMPLE

   Let's say that you view search keyword results from your users and find that many are entering the search term "sofa." Unfortunately, you have not used that word in your project, so users are unable to find the topics that they need. However, you have used a similar word, "couch." Therefore, in the Synonyms Editor, you enter "couch" as a synonym for "sofa." The next time a reader enters "sofa" as a search keyword, topics containing the word "couch" will be returned in the results.

   a. Select the **Directional** tab.
   b. Click in the empty **Word** cell and press **F2** on your keyboard.
   c. Type the phrase that users are entering when performing a search but not finding results (e.g., sofa). Press **Enter** when you are finished.
   d. Click in the empty **Synonym** cell and press **F2** on your keyboard.
   e. Type the parallel search phrase that is contained in the project content (e.g., couch). Press **Enter** when you are finished. In the future, when users perform a search and enter the term from the Word cell (e.g., sofa), Flare will find all topics that contain the term that you entered in the Synonym cell (e.g., couch).

f. (Optional) Click in the **Stem** check box if you want Flare to accept other variations of the search term that have the same stem.

> **EXAMPLE**
>
> Let's say you enter "hike" in the Word cell, and you enter "walk" in the Synonym cell. Then you select the Stem check box. In the future, if users search for the word "hike," it will find all topics containing the word "walk." The same will happen if users enter other search phrases with the same stem, such as "hiked" or "hiking."

Synonym group This is a collection of synonyms that produces the same search results for all of the words in the group. It is a useful method if you have multiple terms in your project that are similar, and you want the same search results to be returned when users enter any of those phrases. It works like this... In the Synonyms Editor, you enter the terms with an equal sign between each one (Synonym1=Synonym2=Synonym3=Synonym4). When users enter any of those terms in future searches, all topics containing any of those words are found.

> **EXAMPLE**
>
> Let's say that you have written some content about sports, and many of your topics include the words "sports," "athletics," or "games." If a user enters the word "athletics" as the search term, it will return not only topics containing that word, but also topics containing the words "sports" or "games" (even if "athletics" does not occur in those other topics).

a. Select the **Groups** tab.

b. Click in the empty **Group** cell and press **F2** on your keyboard.

c. Type the words that you want to include in the group, with an equal sign between each (e.g., sports=athletics=games). Press **Enter** when you are finished.

d. (Optional) Click in the **Stem** check box if you want Flare to find other variations of the synonyms that have the same stems.

> **EXAMPLE**
>
> Let's say you enter "hike=walk" in the Group cell. Then you select the Stem check box. In the future, if users search for the word "hike," it will find all topics containing the words "hike" or "walk." However, it will also find topics containing words that have the same stem as those terms, such as "hiked," "hiking," or "walking."

4. Click  to save your work.

Charts

One great way to view end user statistics for your online documentation is to create and work with charts, which allow you to more easily recognize user trends.

- **Creating charts** You can quickly transfer user statistics to many different kinds of color charts, making it easier to see at a glance how readers are using your online output. When you transfer user statistics to a chart, you can quickly change the type of chart that displays the information. This includes a variety of pie, donut, bar, cylinder, and line charts. See "How to create a Feedback chart" on page 54.
- **Editing chart styles** After you create a chart, you can use the Chart Style Editor to modify the way it looks. You can modify a chart by including a grid, adding a shadow, modifying the spacing of elements, and changing the opacity. See "How to edit a Feedback chart" on page 55.
- **Printing charts** You can print charts created in the Feedback Explorer. See "How to print charts from the file menu" on page 56 and "How to print charts from the local toolbar" on page 56.

How to create a Feedback chart

1. Open the Feedback file.
2. Open the window with the type of information that you want to view in a chart. Following are the different types of information for which you might create charts:
   - **List of topics visited** You can see information on the topic path, view count, comment count, average rating, and rating count. See "How to view topics opened by users" on page 36.
   - **Search phrases** You can see statistics on all search phrases used, including the number of searches performed for each term and the number of results returned for users each time. This lets you know the information that users are seeking most often. You can then make the necessary adjustments to your project, such as adding more details to the appropriate topics. See "How to view used search phrases" on page 50.
   - **Search phrases with no results** You can see statistics on the search phrases for which users did not find results, including the number of searches performed for each term. You might then create synonyms to enhance future results. See "How to view searches without results" on page 51.

   > **Note:** You may need to refresh the window to make sure you see the latest results. To do this, simply press **F5** on your keyboard.

3. Select the rows of information that you want to include in the chart. You can select multiple rows by holding down the **SHIFT** or **CTRL** key and clicking a range of rows or individual rows.
4. (Optional) You can specify the column information included in the chart. To do this, use the following steps:
   a. In the local toolbar, click 

   . The Columns dialog opens.
   b. In the **Chart** column, click the check box to add a check mark next to each column that you want to include.
   c. Click **OK**.
5. In the local toolbar, click .

   The Chart Window opens (by default on the right side of the interface). If necessary, you can click on the window divider and drag it to see more of the chart.
6. Click the down arrow at the top of the Chart window to select the type of chart to display.

How to edit a Feedback chart

1. Open the Feedback file.
2. Create a Feedback chart by sending user statistics to the Chart window.

   See "How to create a Feedback chart" on page 54.

3. In the local toolbar of the Chart window, click **Edit Style**.

   The Chart Style Editor opens, displaying a new chart file (with an .mcchart file extension). This file is stored by default in a subfolder named "My Chart Styles" (which is generated for you and placed in your My Documents folder). By default, the chart file is named after the type of graph that you have selected (e.g., Pie.mcchart).

4. If you want to change the kind of chart being modified, select the **Type** tab. Then choose a new chart type from the list.
5. On the **Option** tab, do any of the following:

   Add/remove a grid Some kinds of charts (such as bars and lines) are displayed by default with a grid, which helps to see the placement of values.

   - Click in the **Draw Grid** box to add or remove the check mark.

   Add/remove a shadow By default, elements in charts are displayed with shadows behind them to give the feeling of depth.

   - Click in the **Draw Shadow** box to add or remove the check mark.

   Change the spacing of elements You can change the width of certain chart elements (such as bars), making them thinner or wider.

   - Drag the **Element Spacing** bar to change the width. Moving the bar to the left makes the element thinner, whereas moving the bar to the right makes the element wider.

   Change the opacity of elements You can change how transparent or solid the chart elements look.

   - Drag the **Element Opacity** bar to the left or right. Moving the bar to the left makes the element more transparent, whereas moving the bar to the right makes the element more solid.

6. Click  to save your work.

How to print charts from the file menu

1. Create the Feedback chart.

   The Chart window opens.

2. Select **File>Print**.
3. Complete the options in the Print dialog.
4. Click **OK**.

How to print charts from the local toolbar

1. Create the Feedback chart.

   The Chart window opens.

2. Use the buttons in the local toolbar of the Chart window to specify settings and send the chart to the printer:

   - Opens the Print dialog, which lets you send the chart to a printer. After you make your selections in the dialog, click **OK**.
   - **Print Preview** Opens the Print Preview dialog, which lets you see how the Feedback chart will look when you print it. This includes the ability to zoom in and out. When you are finished in the dialog, either click to send the chart to the printer or Close to return to the Chart window.
   - **Page Setup** Opens the Page Setup dialog, which lets you specify different settings for the printed output, including the size, source, orientation, and margins. When you are finished in the dialog, click **OK**.

Exporting

You can export Feedback data such as topics visited, comments, ratings, search terms used, and active users. You can also export synonyms that you have created to enhance user searches in the output.

- **Exporting data to Microsoft Excel (using a CSV file)** After you accumulate data in the Feedback Explorer, you can export it to a comma-separated value (CSV) file. You can then open the file in Microsoft Excel. See "How to export Feedback data to Microsoft Excel (using a CSV file)" on page 57.
- **Exporting data to a tab-delimited text (TXT) file** After you accumulate data in the Feedback Explorer, you can export it to a tab-delimited text (TXT) file. See "How to export Feedback data to a tab-delimited text file" on page 58.
- **Exporting synonyms** After creating synonyms in the Feedback Explorer, you may want to export the synonyms file (MCSYNS) to another location. Those synonyms can then be added to the Flare project associated with the Feedback file, or even a different Flare project. See "How to export synonyms" on page 59.

How to export Feedback data to Microsoft Excel (using a CSV file)

1. Open the window whose data you want to export:
   - All topics visited (**View>Topics**)
   - All topic ratings (**View>Topics**; double-click topic row; select **Ratings** tab)
   - All author-only comments (**View>Topics**; double-click topic row; select **Ratings** tab)
   - All community-wide comments (**View>Topics**; double-click topic row; select **Comments** tab)
   - Pending comments (**View>Pending Comments**)
   - Active users (**View>Active Users**)
   - All search terms used (**View>Search Phrases**)
   - Search terms for which no results were found (**View>Search Phrases with no results**)
2. Select the rows that you want to include in the export. You can hold down the **SHIFT** or **CTRL** key to select a range of rows or individual rows, respectively.
3. Select **File>Save To**.

   The Save As dialog opens.
4. Navigate to the location where you want to save the exported file.
5. In the **File name** field, type a new name for the exported file.
6. In the **Save as type** field, select **Comma Delimited Text File (*.csv)**.
7. Click **Save**. You can now open the file in Microsoft Excel.

How to export Feedback data to a tab-delimited text file

1. Open the window whose data you want to export:
   - All topics visited (**View>Topics**)
   - All topic ratings (**View>Topics**; double-click topic row; select **Ratings** tab)
   - All author-only comments (**View>Topics**; double-click topic row; select **Ratings** tab)
   - All community-wide comments (**View>Topics**; double-click topic row; select **Comments** tab)
   - Pending comments (**View>Pending Comments**)
   - Active users (**View>Active Users**)
   - All search terms used (**View>Search Phrases**)
   - Search terms for which no results were found (**View>Search Phrases with no results**)
2. Select the rows that you want to include in the export. You can hold down the **SHIFT** or **CTRL** key to select a range of rows or individual rows, respectively.
3. Select **File>Save To**.

   The Save As dialog opens.
4. Navigate to the location where you want to save the exported file.
5. In the **File name** field, type a new name for the exported file.
6. In the **Save as type** field, select **Tab Delimited Text File (*.txt)**.
7. Click **Save**.

How to export synonyms

1. Open the Synonyms Editor by doing one of the following:
   - Select **View>Synonyms**.

     OR
   - Press **CTRL+W** on your keyboard.

     OR
   - In the Standard toolbar, click .
2. Do one of the following:
   - Select **File>Save As**.

     OR
   - Select **File>Save To**.
3. In the Save As dialog, navigate to the folder where you want to save the exported file. If you want to add the synonym file to a particular Flare project, you can navigate to the Project\Advanced subfolder where that project is stored.
4. In the **File name** field, enter a name for the synonym file.
5. Click **Save**.

Index