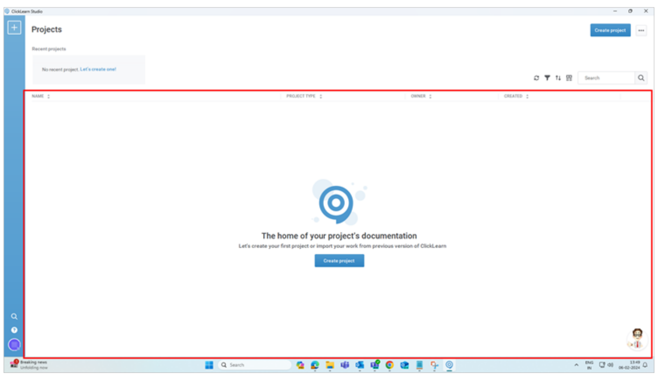
1. Projects

1.1. Project Space of users

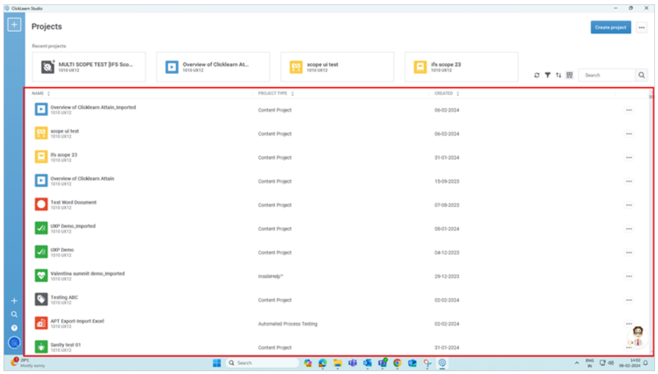
1.1.1. Project Space of a New User

This is what the project space looks like for a **new** user.



1.1.2. Project Space of an Existing User

This is how the project space looks like for an **existing** user.



1.2. Create a new Project

1.2.1. Introduction

In this section, you will learn how you can use ClickLearn Attain to create learning materials with projects.

Recordings are the basic units of content that capture the steps of a process.

You can group your recordings into one or more projects according to your needs.

A **project** is a container that organizes your recordings based on your needs.

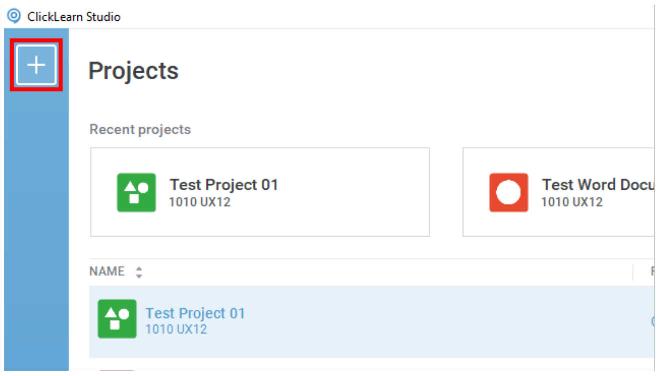
1.2.2. Getting Started

1.2.3. Create a new project

Click on the button **New Project.**
To create a new project, choose a type that matches your requirements.

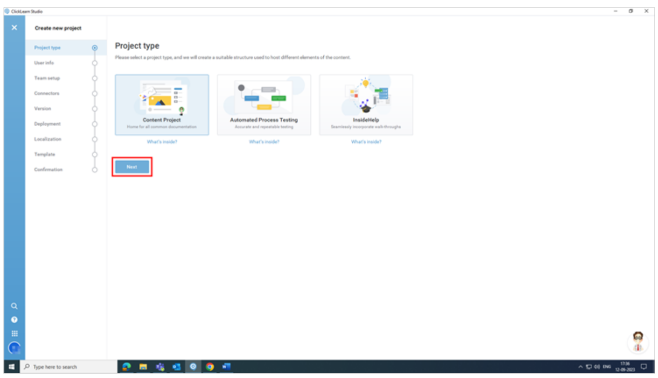
This section will explore the distinct kinds of projects that ClickLearn Attain offers.

You can choose the project type based on your needs.



1.2.4. Project Type

Choose the type of project you want to create.
Click on the button **Next.**
We have a different recording for the project type. To know more details about the project type, refer to the recording **Project Type**.

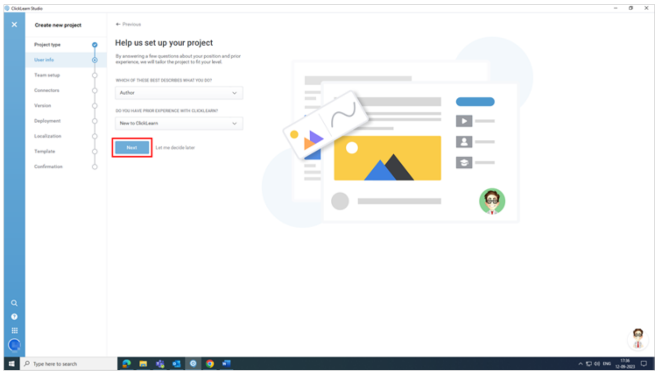


1.2.5. User Info

User info asks you for details like which role best describes you and the level of experience you have with ClickLearn Attain, which helps set up your project.

Select the role that best describes you and your experience with using ClickLearn Attain.

Click on the button **Next.**



1.2.6. Team Setup

Team Setup allows you to invite your team and collaborate on projects with them. It also displays a list of users, roles, and permissions.

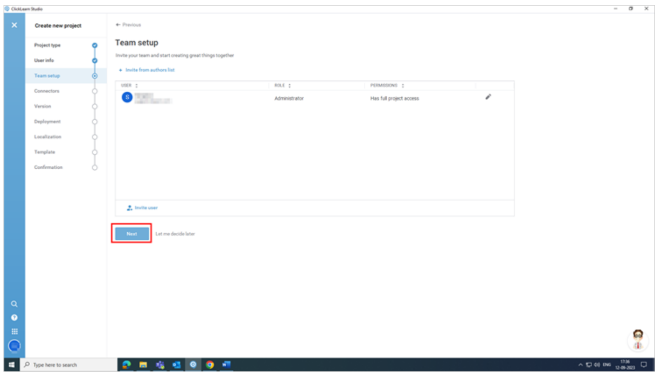
Invite from author's list: This option helps you invite users who are already a part of ClickLearn Attain.

Invite user: This option invites a user who is not a part of ClickLearn Attain. To invite a new user, you must enter their email address, full name, and assigned roles.

Role of the user:
1. **Author:** Can create and edit recordings for the entire project.
2. **Administrator:** Has full project access.

You can change the role and permissions of a user in your project by clicking on the pencil icon next to permission after adding the user.

Click on the button **Next.**

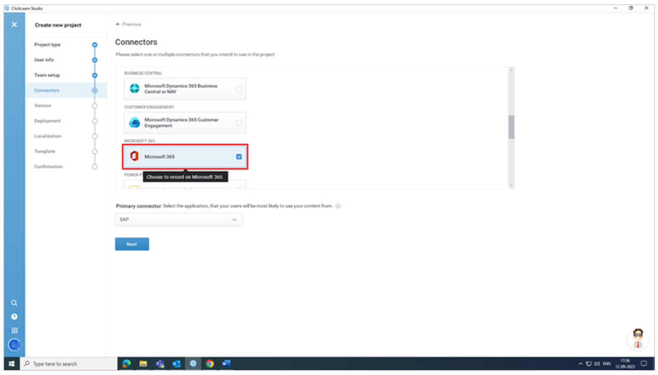


1.2.7. Connectors

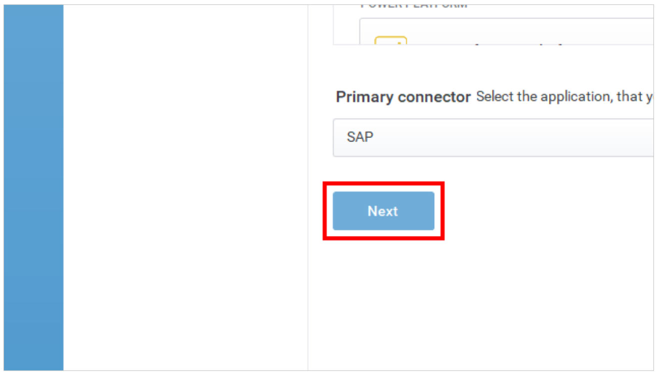
A connector is a tool that enables ClickLearn Attain to follow your actions in different applications and capture them as steps in your learning materials.

You can select one or multiple connectors you intend to use based on your requirements for your project.

Click on the list item **Microsoft 365.**



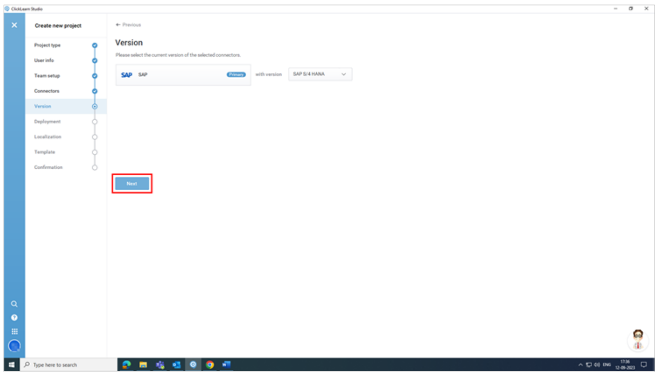
Click on the button **Next.**



1.2.8. Version

You can choose the version of the selected connector.

Click on the button **Next.**



1.2.9. Deployment

This shows the deployment options that are available for the standard content project. Depending on your use case, you can select the one that best fits your project.

You can choose from different deployment options, such as:

Content Cloud

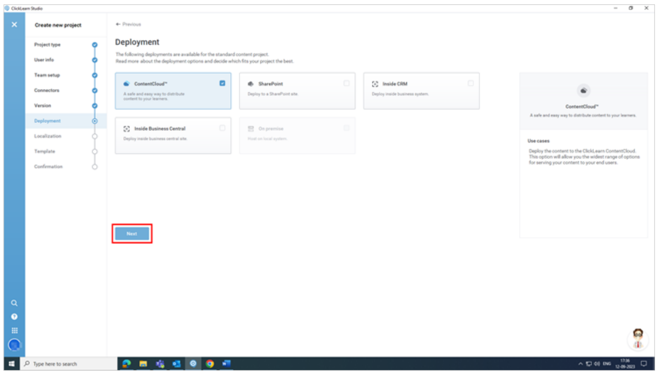
SharePoint

Inside CRM

Inside Business Central

On premise

Click on the button **Next.**



1.2.10. Localization

Localization is the list of languages you wish to deliver your project in.

The **Add new language** option will help you add languages you want your project in.

You can also change the UI language depending on the language you choose for your project.

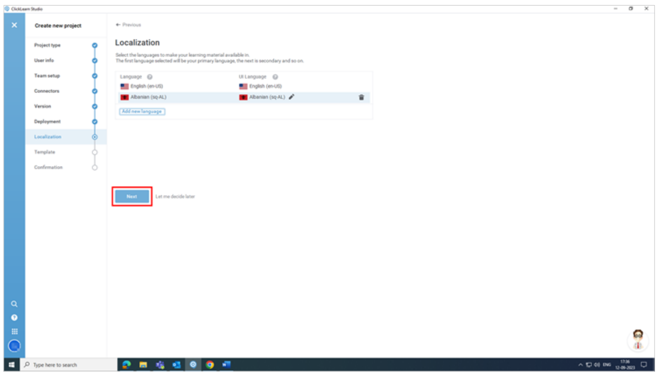
The first language you select will be your primary language; the next is secondary, and so on.

You can also have your UI language in English and your recordings in a different language, such as Spanish. In this case, you just need to add Spanish and keep the UI language as English only.

Delete: This option lets you remove a specific language from your project.

You can also choose the **let me decide later** option, wherein you can add and modify languages as needed.

Click on the button **Next.**

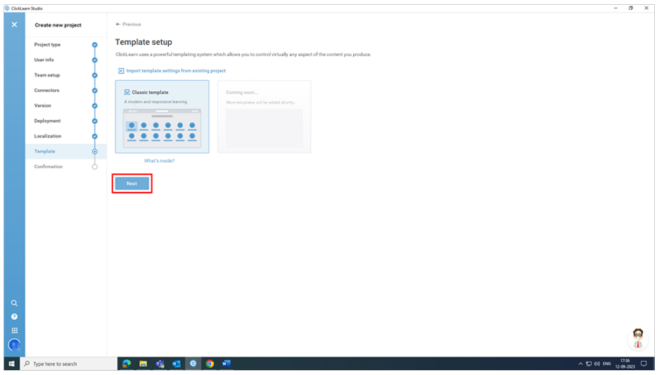


1.2.11. Template

You can control any aspect of the content you produce.

The button **Import template settings from existing project** allows you to import the same template from an existing project and use it for your ongoing project.

Click on the button **Next.**

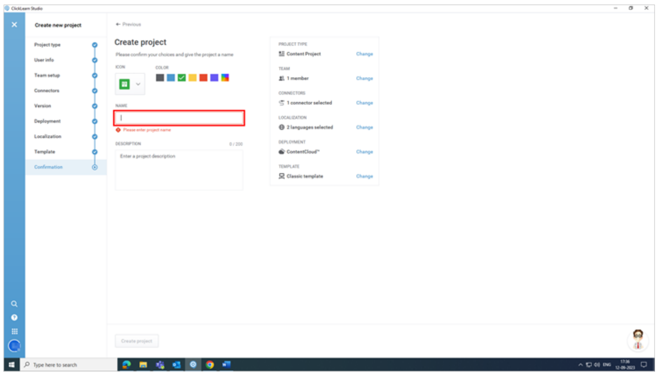


1.2.12. Confirmation

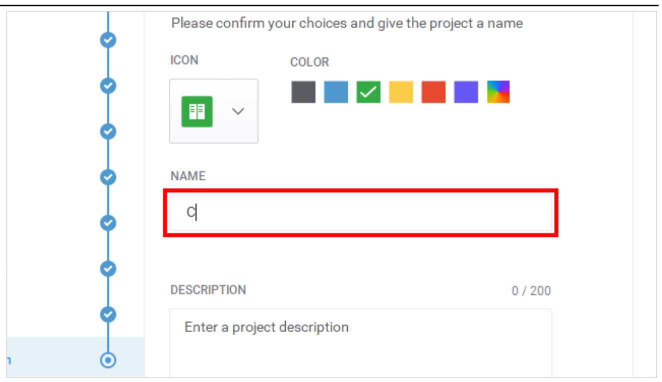
While creating a new project, you can also select an icon and color for your project.

On the right-hand side, as you can see, all the essential components of creating a new project are involved, starting with the project types and then the template. You can also edit and change the settings from the confirmation screen.

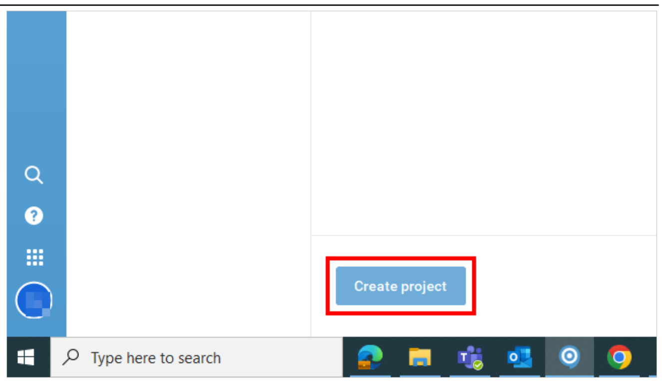
Click on the textbox **Project Name**.



Enter **Project Name**.



Click on the button **Create project.**
This will create and open the project for you.



1.3. Project Types

1.3.1. Overview of Project Types

1.3.1.1. Content Project

A content project is the best option for beginners using ClickLearn Attain. You can organize your work and collaborate with other team members on different tasks, working simultaneously on the project.

1.3.1.2. Automated Process Testing

APT stands for Automated Process Testing. APT project is a project type in ClickLearn Attain that lets you test your processes.

NOTE: A detailed knowledge of the replay function is recommended before you start using APT.

1.3.1.3. Inside Help

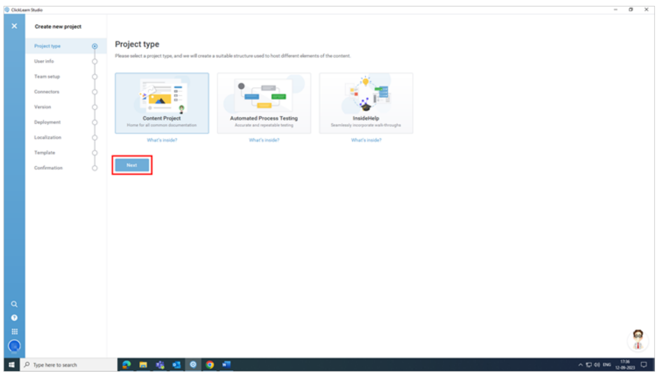
With the help of the Inside Help project, you can document your fields, forms, and tables in an easy-to-use interface.

Integrate it with your recorded content and deploy it to the entire Dynamics platform.

NOTE: For more detailed information about each project type, click the **What's inside?** Below respective projects.

NOTE: For beginners who want to use ClickLearn Attain, we suggest that you start with the Content Project.

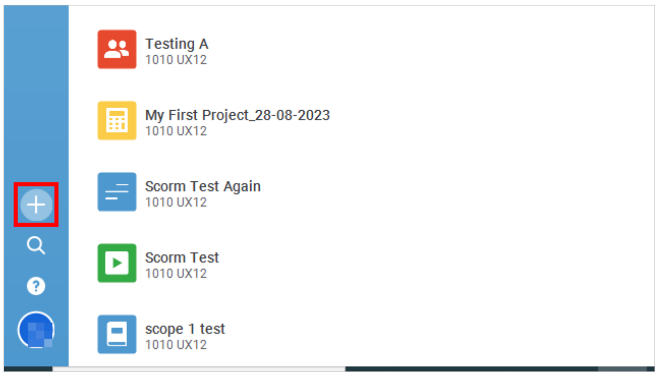
Select the project type as Content Project.



1.4. Left side menu

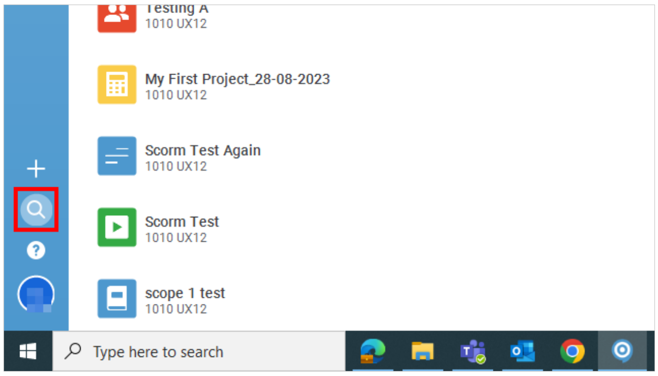
1.4.1. Create a new Project

Another way to create a project is by clicking the **+** icon here.



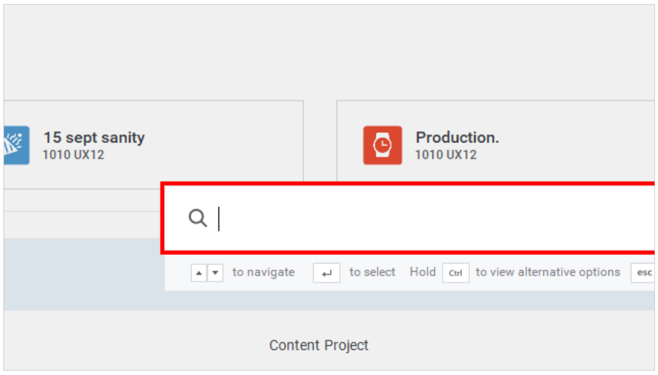
1.4.1.1. Search

You can use the **Search** option to find your project by typing its name.



Click on the textbox **Search.**

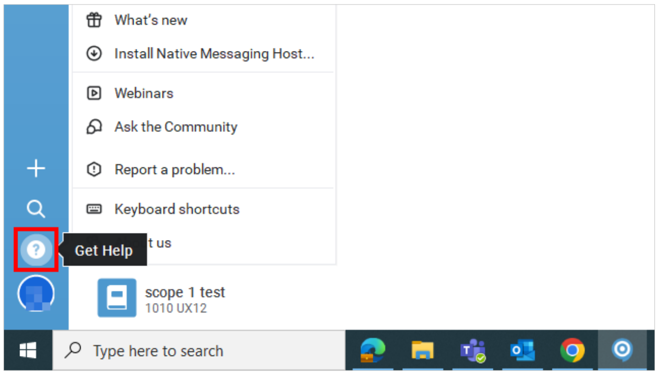
Enter the project name you wish to search.



1.4.1.2. Get Help

Some of the other options that you can access from the **Get Help** menu are:

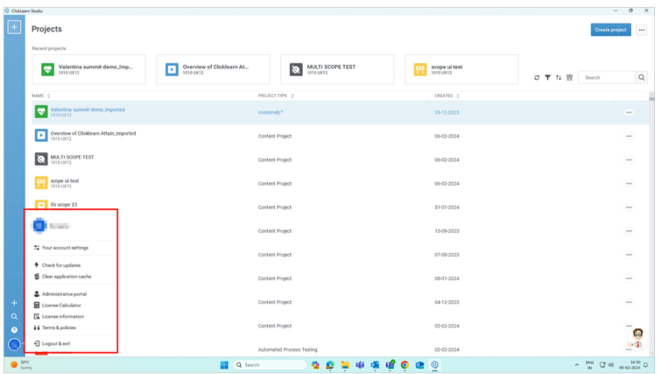
- What's New
- Install Native Messaging Host
- Webinars
- Ask the Community
- Report a problem
- Keyboard Shortcuts
- About us



1.4.1.3. Profile

The other options that you can access from the label **Profile** are:

- Your account settings
- Check for updates
- Clear application cache
- Administrative portal
- License Calculator
- License information
- Terms & policies
- Logout & exit

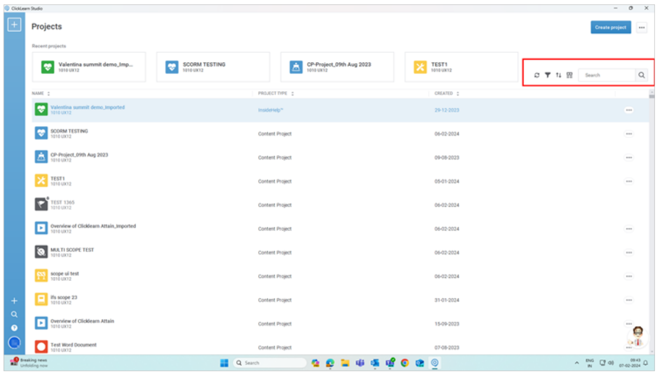


1.5. Other basic menu items

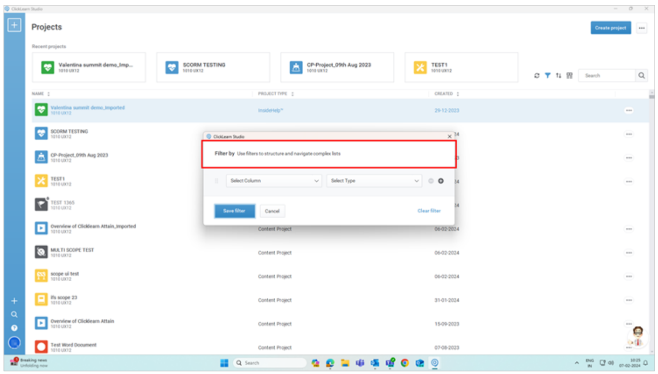
1.5.1. Other Basic Elements

The other basic elements which will be visible in almost every other component are:

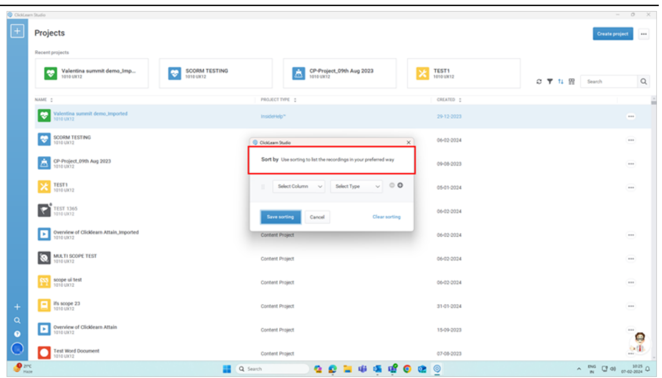
Refresh: Refresh reloads or updates what is displayed or stored on a device.



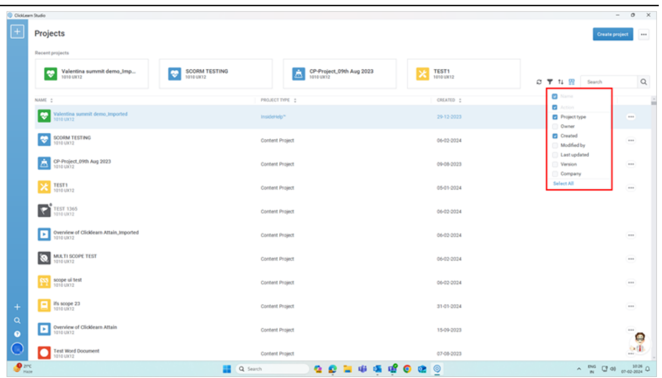
Filter: By selecting the column and type from the list, you can use this feature to structure and navigate through complex lists easily. You can also specify your search criteria to suit your needs.



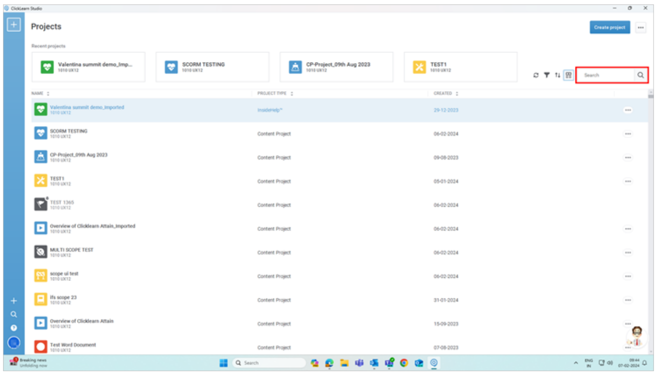
Sort: This feature can arrange the recordings to best suit your project needs. You can also choose your criteria to sort the recordings according to your preferences.



Column Chooser: This feature lets you customize the main screen of the studio by selecting the columns you want to see, such as the project type, owner, etc.



Search: This feature lets you search from the available lists of projects.

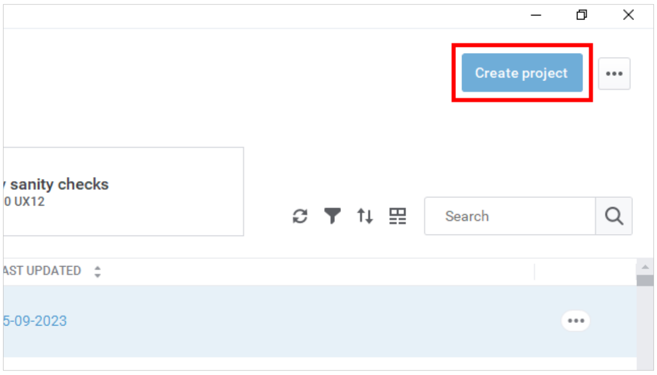


1.6. Components at top right corner

1.6.1. Other Components at the top right corner

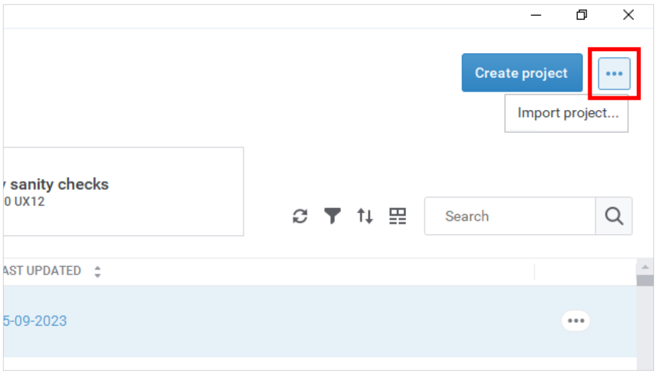
1.6.1.1. Create Project

Another way to create a new project is by clicking the **Create project** button at the top right corner.



1.6.1.2. Project More

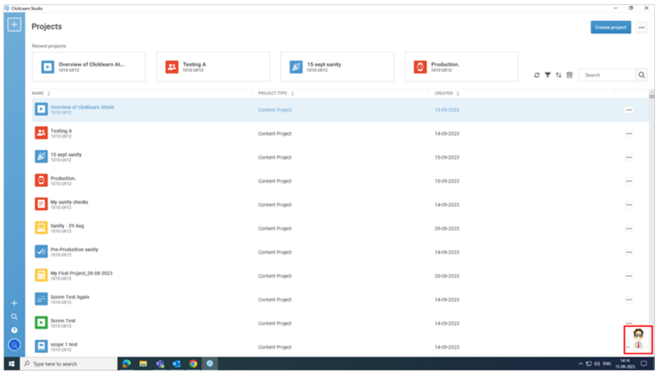
To import a project from your system, click on the icon **project more**, click on the menu item **Import project**, and select the local file you want to import.



1.7. ClickLearn Assist

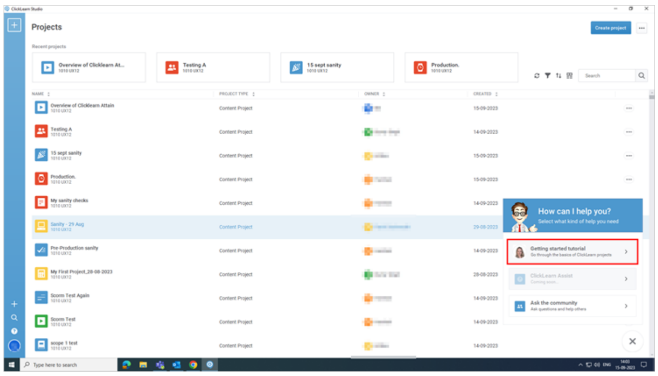
1.7.1. ClickLearn Assist

Click on the **Assist** icon available at the bottom right corner of the screen.

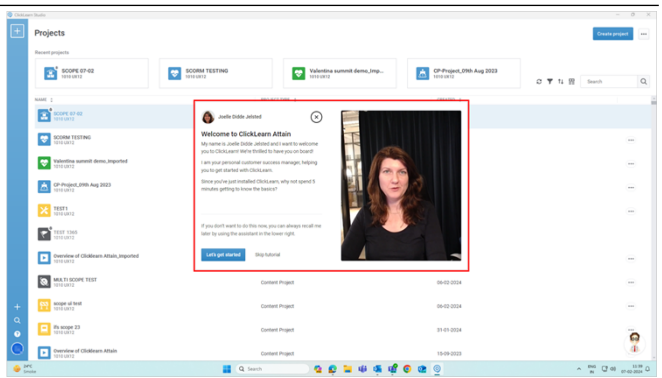


Click on the list view item **Getting started tutorial.**

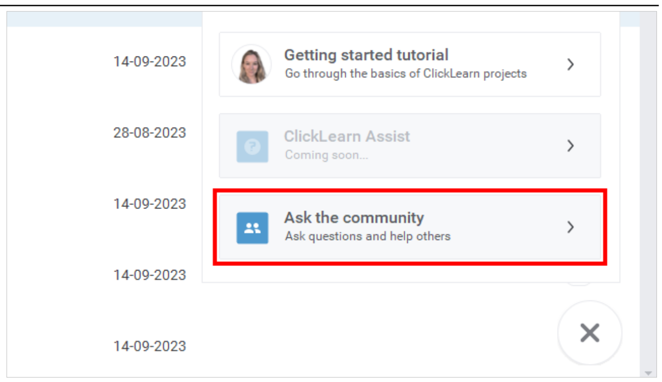
The second feature, ClickLearn Assist, is coming soon.



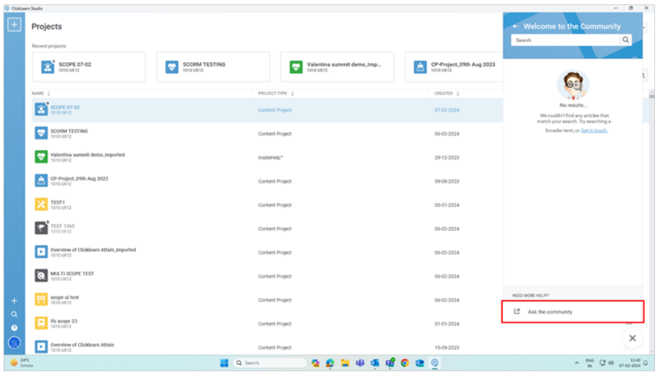
When you click on the Getting Started Tutorial, it will start with a video tutorial that will guide you on creating a project, and so on.



Click on the list view item: **Ask the community.**



When you click on the button **Ask the community**, it will redirect you to the ClickLearn community page, wherein you need to enter the basic details for the assistance you need.

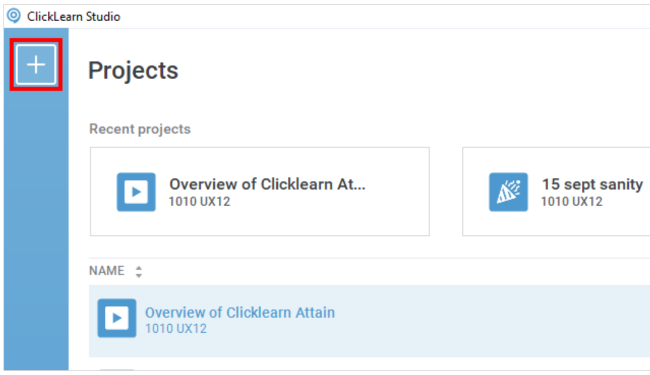


1.8. Project Space

1.8.1. Project

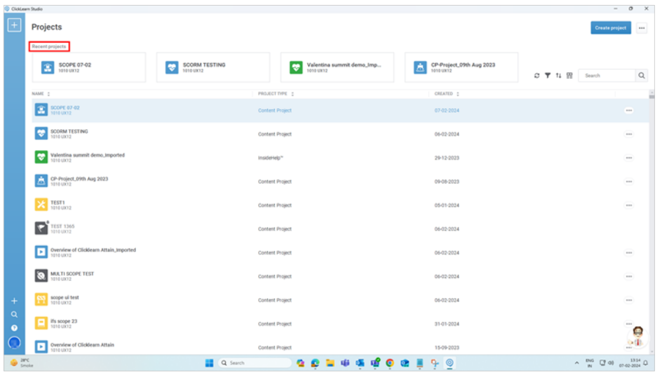
1.8.1.1. Create new project

A ClickLearn Attain project is a way of arranging your recordings or learning materials in a folder-like way. You can use different criteria to sort them and keep them organized.
The **plus (+)** icon will help you create a new project.

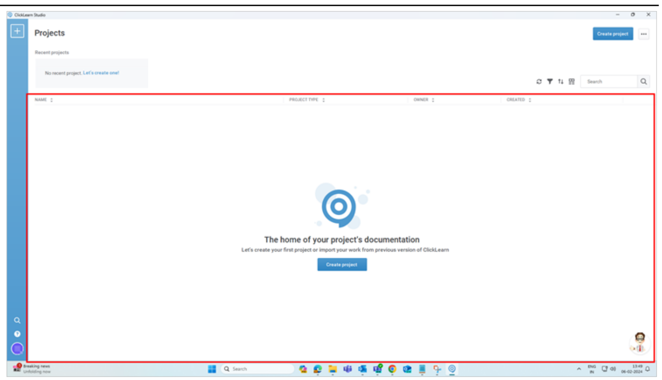


1.8.2. Recent Projects

The **Recent projects** you have worked on will appear next to the + icon if you are an **existing** user.



This is how the screen looks like for a **new** user.



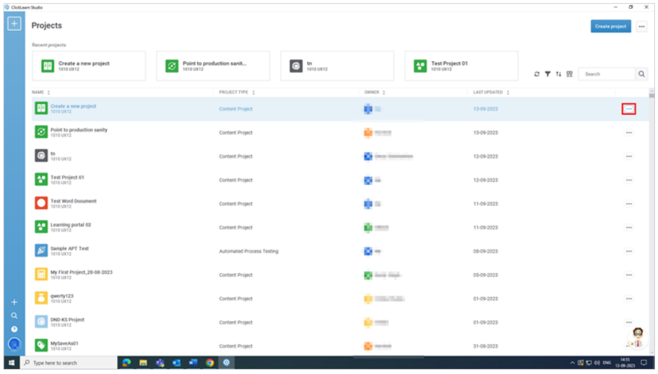
1.9. Create a project from an existing one

1.9.1. Save As Project

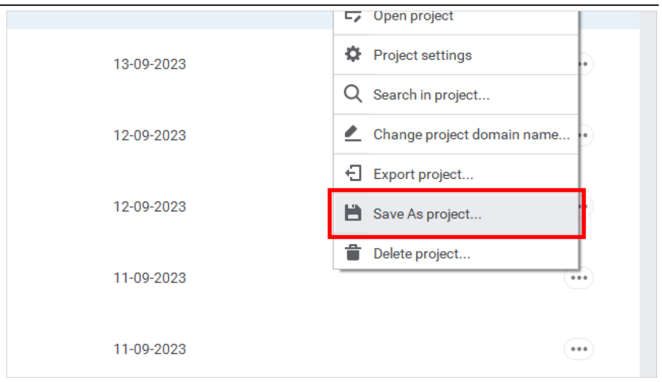
This is a step-by-step guide to using the Save As project feature.

NOTE: To avoid conflicts or errors, check that no one else in your team is using the same project as you before you use the save as feature.

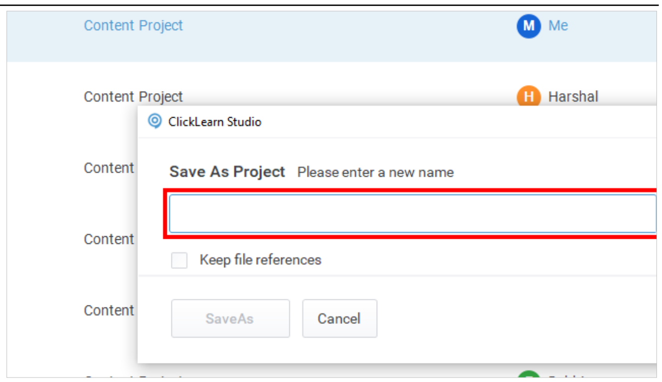
Select the project you wish to save as.
Click on the button **More** of grid cell **Action**.



Click on the menu item **Save As project**.



Click on the **textbox** and enter a name for your project.

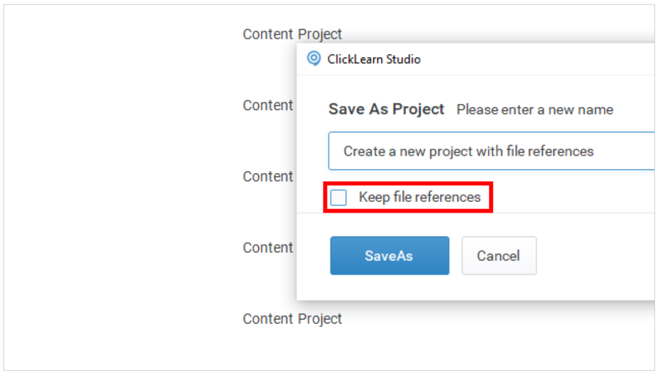


1.9.1.1. Keep File References

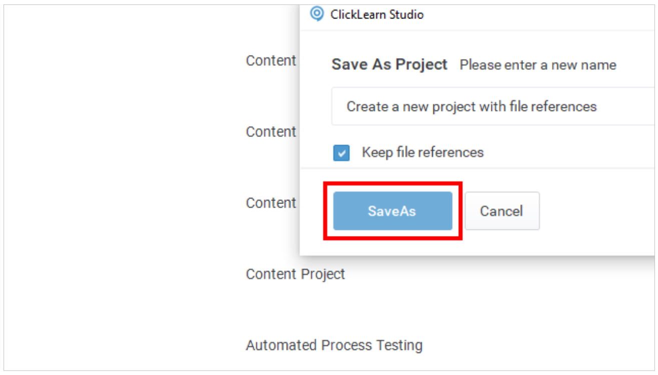
You can decide whether to check or uncheck the file references option, depending on your project needs.

In this case, we select the option "**Keep file references.**"

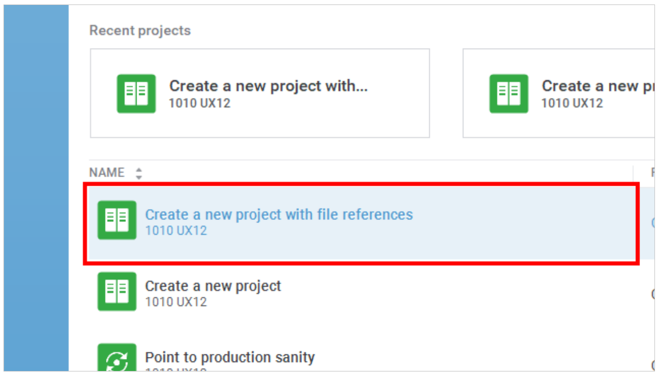
Click on the checkbox **Keep file references**.



Click on the button **SaveAs**.

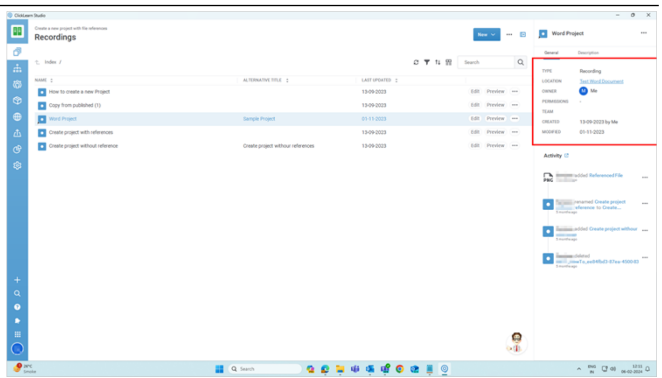


Double-click on the grid cell **NAME** with the value **Create a new project with file references**.
Once the save-as file is generated, open the same file and click on the recording you have used as a reference.



On the right-hand side, as you can see in the **general settings**, you have a link to the recording of the reference file. The file location is under **General**, followed by **Location**, and then the recording, called **Test Word Document** (the **actual file location**). That is the place where the actual reference file is located.

The **Keep File References** option lets you choose how to show the reference recordings in your project. If you select it, you will see where the reference recordings are stored. It will only show you a copy of the referenced recording if you do not select it.



2. Recordings

2.1. Copy from published

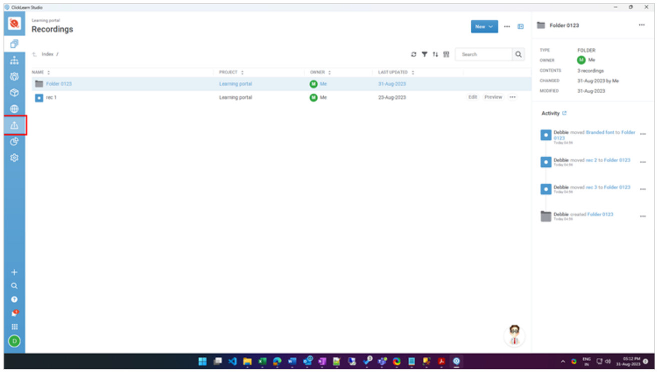
2.1.1. Introduction

Using the "Copy from published" feature, you can import the recordings from an already published project into the current project. The produced and published recordings will be imported into an existing project. Below are the step-by-step instructions on how to do it.

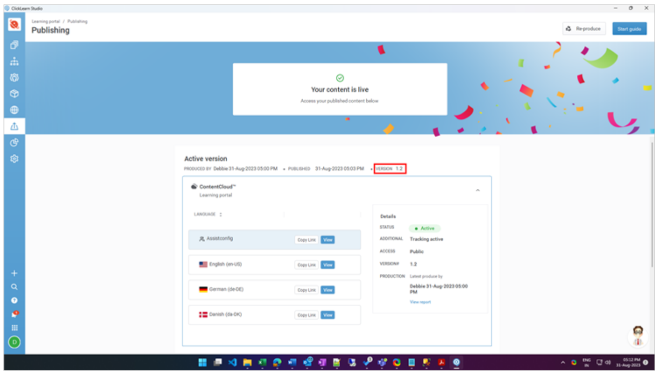
2.1.2. Procedure

2.1.2.1. Source project

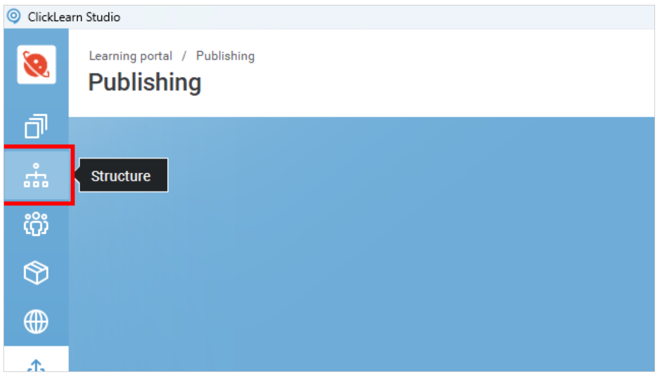
Click on the button **Publishing**.



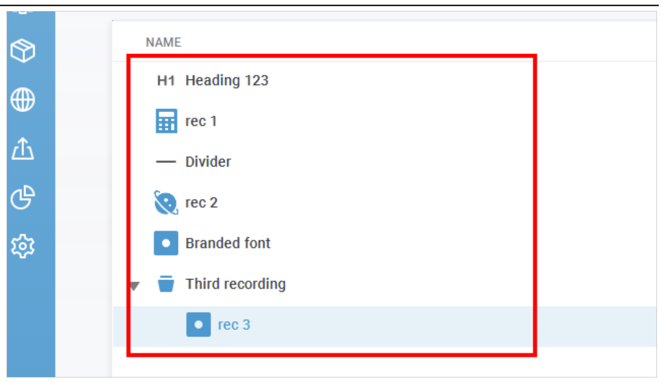
This project has been produced and published, and the active version is **1.2**.



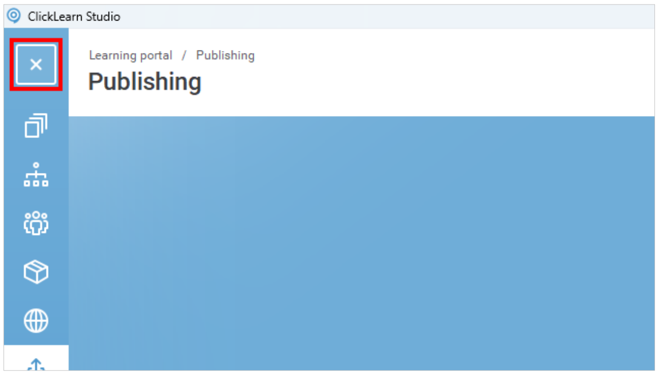
Click on the button **Structure.**



In the current structure, there are **4 recordings,** and the same had been published in version **1.2**.

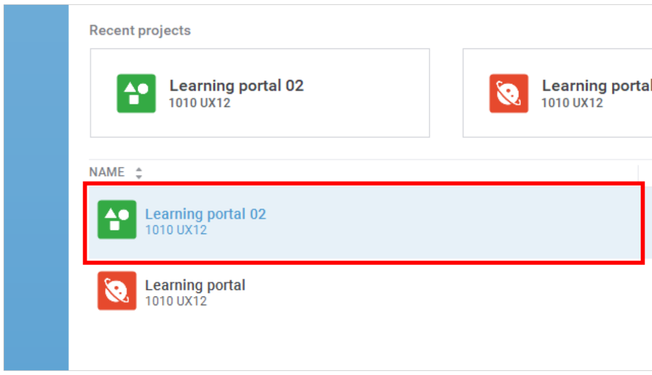


Click on the button **Close project.**

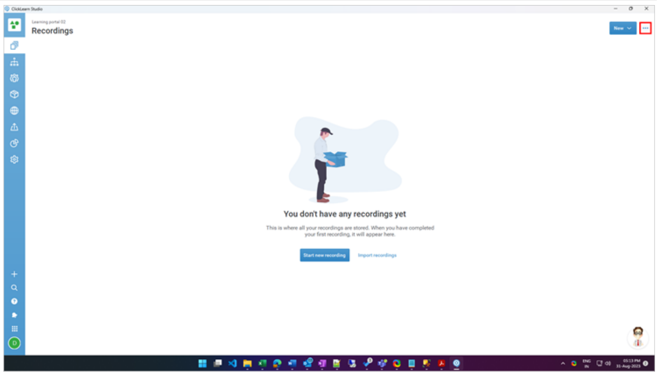


2.1.2.2. Destination project

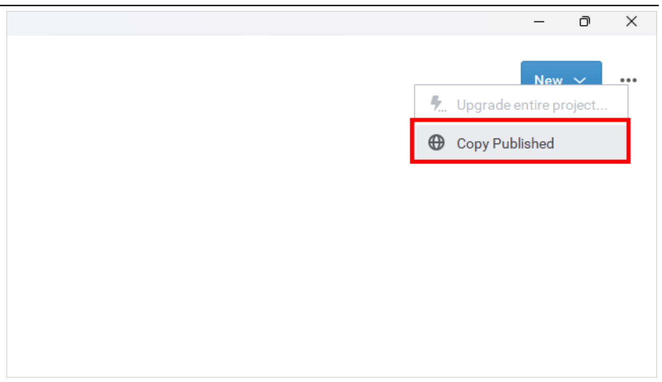
Open the project where you want to import the recordings published in the previous project's version 1.2.
Double-click on the grid cell **NAME** with the value **Learning portal 02.**



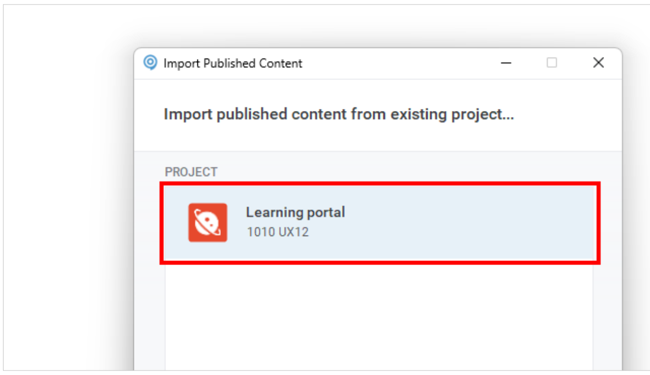
In the recordings screen, click on the button **More.**



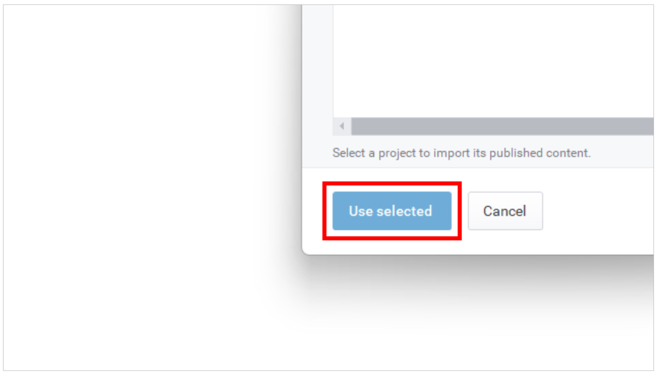
Click on the menu item **Copy Published.**



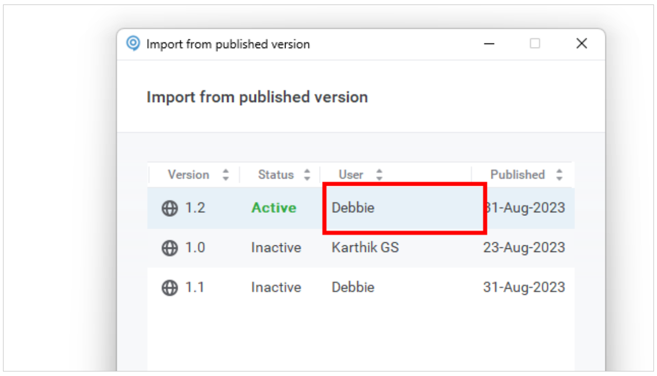
Select the source project.
Click on the item **Learning portal.**



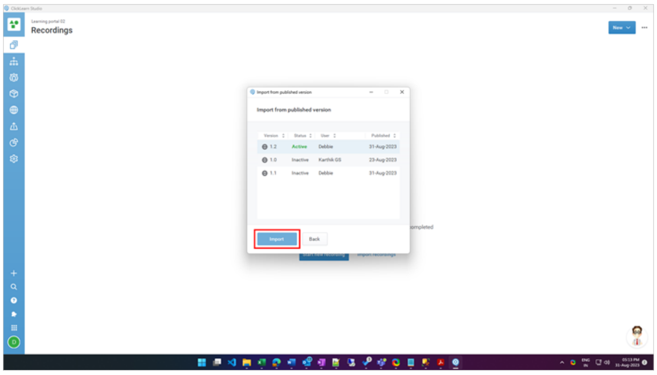
Select the version of the published version from which you wish to import.



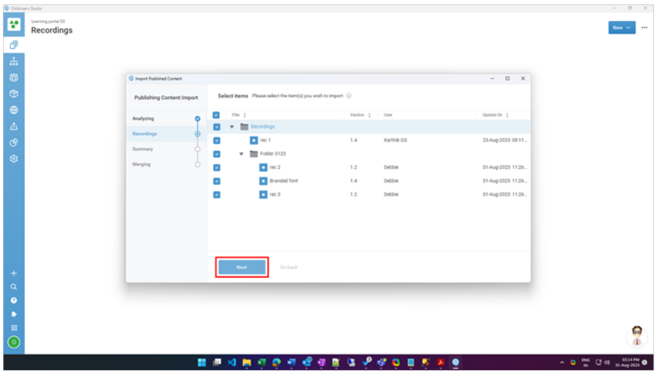
Click on the cell **User** with the value **Debbie.**



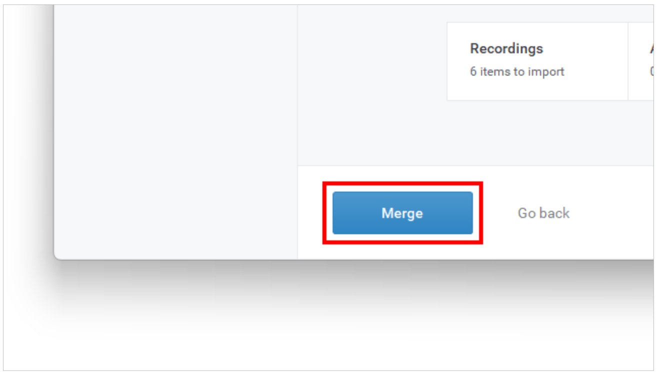
Click on the button **Import.**



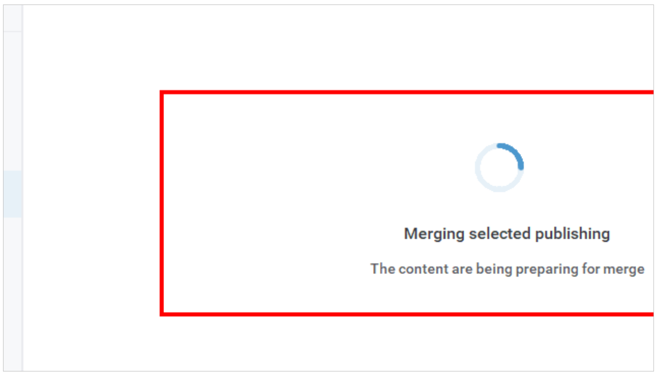
Click on the button **Next.**



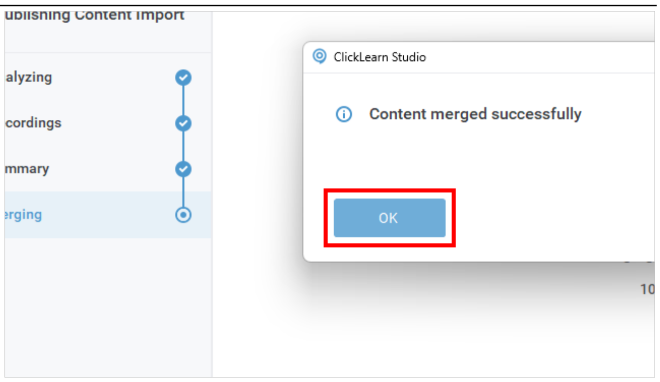
Click on the button **Merge.**



Click on the panel.



Click on the button **OK.**

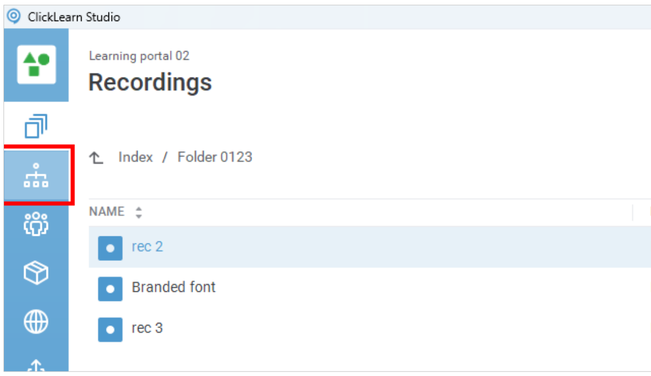


2.1.2.3. Result

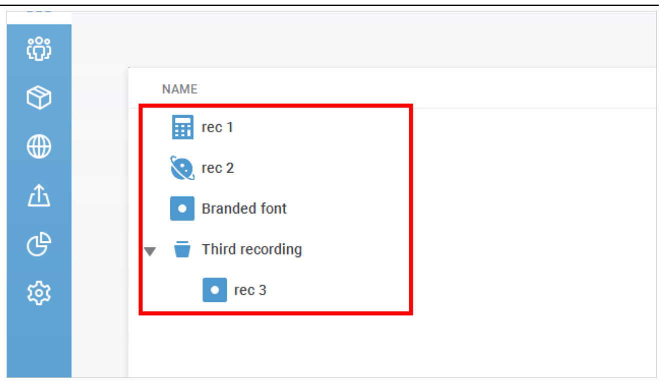
Click on the grid view cell **NAME** with data **rec 1**.

Double-click on the grid view cell **NAME** with data **Folder 0123**.

Click on the button **Structure**.



All the recordings are now imported and added to the structure, too.



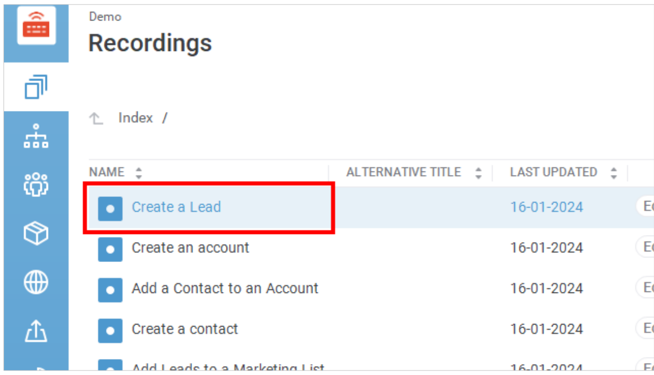
2.2. Summarization

2.2.1. Introduction

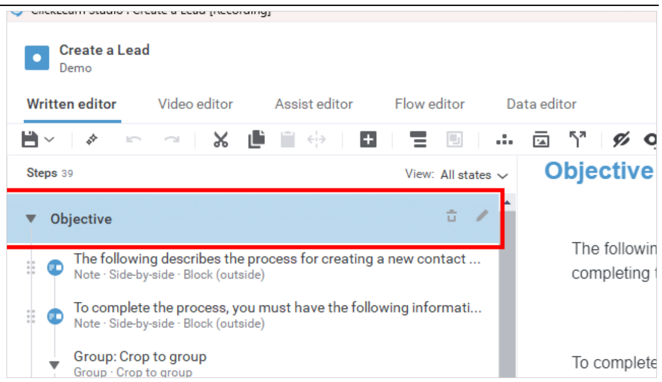
Summarization is the process of creating a concise overview of the recording. It lets the users grasp the main idea of the recording without having to go through all the steps.

For example, if the recording has 200 steps or more, the user can glance at the summarization and have a general idea of what the recording covers.

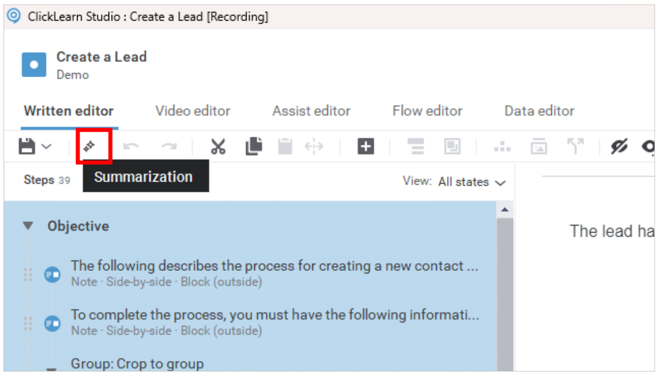
Open the recording for which you would like to create a summarization.
Double-click on the grid view cell **NAME** with data **Create a Lead**.



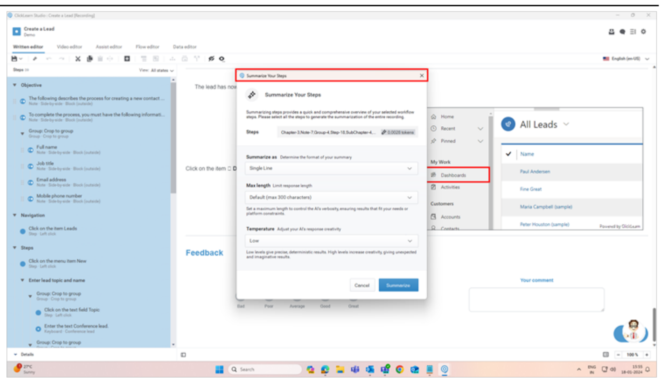
With the **Shift** key pressed, select every step starting from the **Objective**.



Once you select all the steps, click on the button **Summarization**.



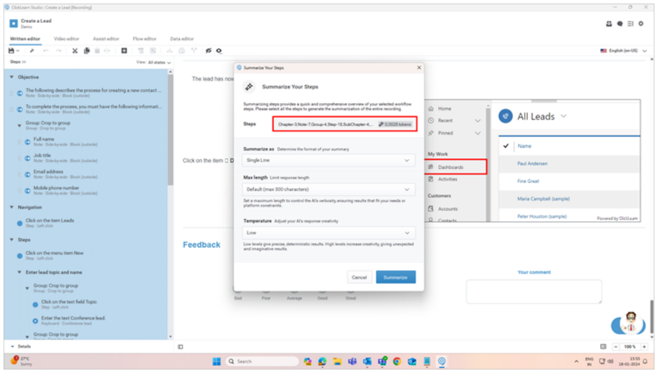
This opens up a new window: **Summarize Your Steps**.



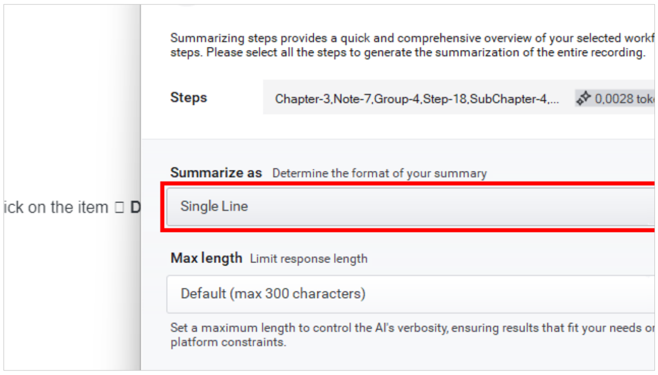
2.2.1.1. Summarization

Summarization includes elements such as steps, sections, groups, etc.

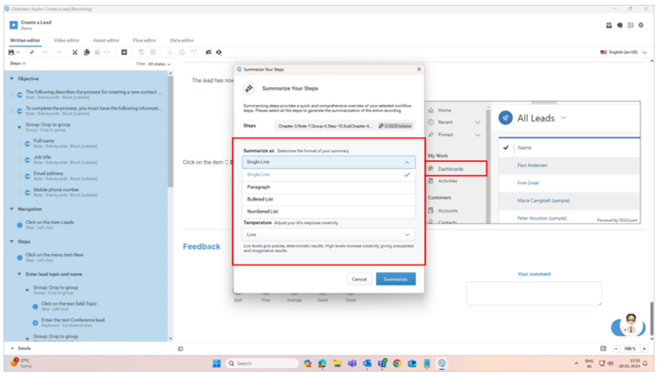
Along with this description, it also displays the number of tokens for that particular account.



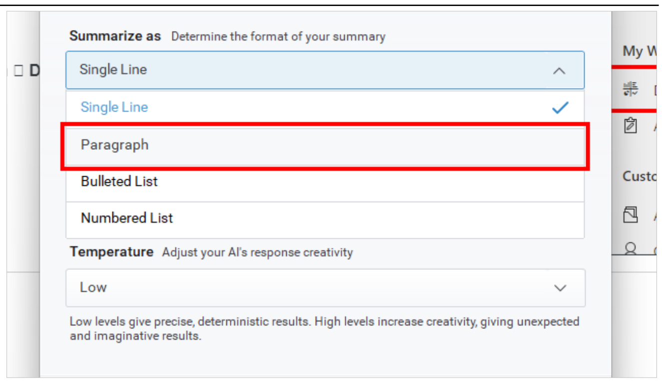
Click on the dropdown **Summarize**.



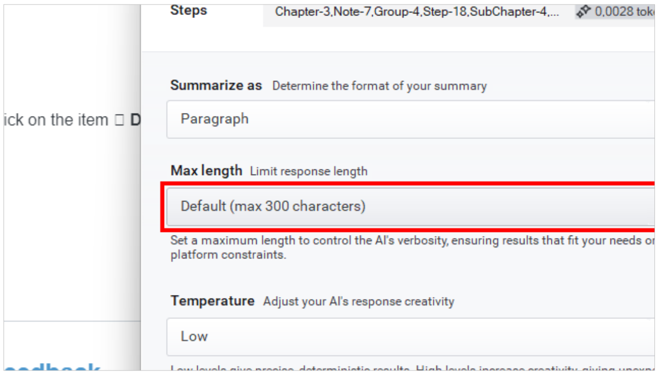
You can determine the format of the summary from the available dropdown options. That is how you would like to display the summary.



In this case, we have selected a **Paragraph** as the format of our summary.

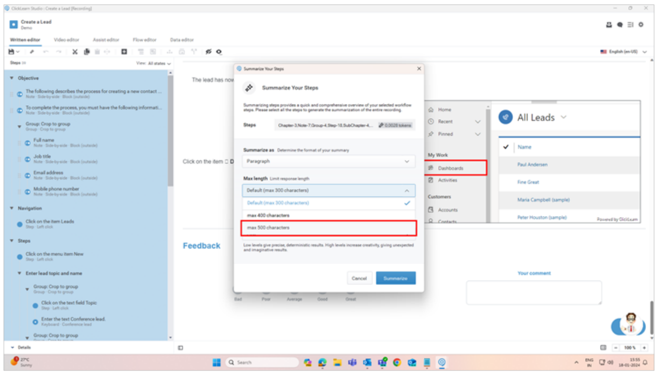


Click on the dropdown **Max Length**.

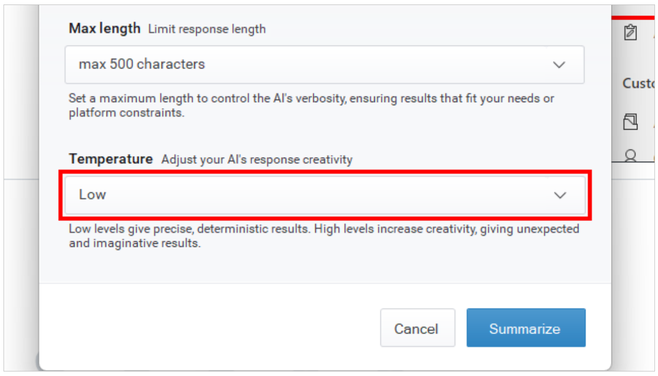


You can set a maximum length to control how the AI responds, ensuring results that fit your needs or platform constraints.

In our case, we have selected the maximum length of the summary as **max 500 characters**.

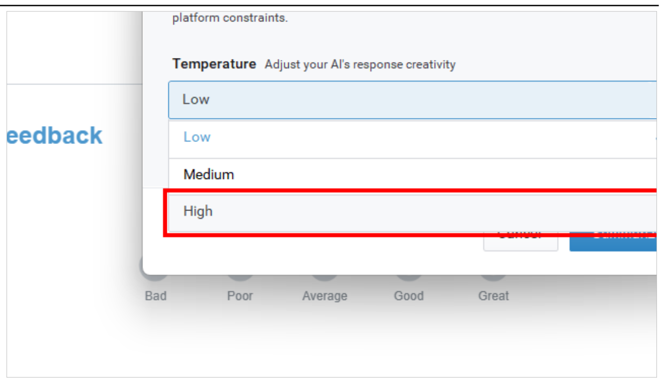


Click on the dropdown **Temperature**.

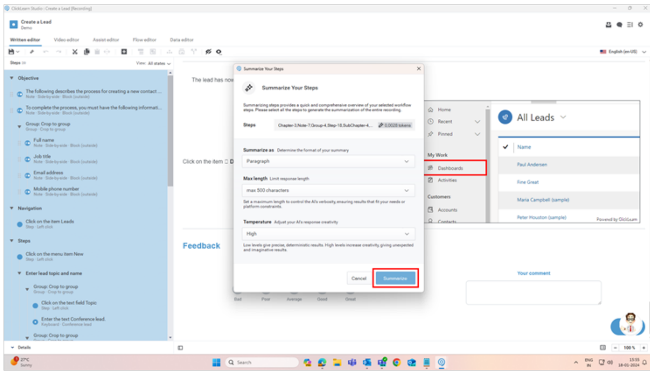


Temperature is a setting that helps you to adjust how creative the AI's response is. Temperature provides three different options: Low, Medium, and High. The low level gives precise information. Medium level gives a balanced response. A high level increases the AI's response creativity.

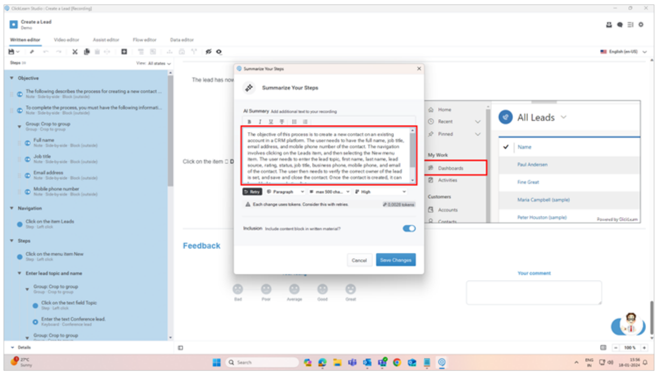
In our case, we have selected the temperature as **High**.



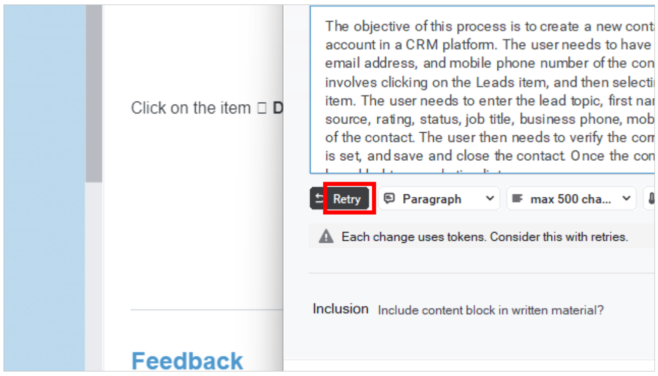
Click on the button **Summarize**.



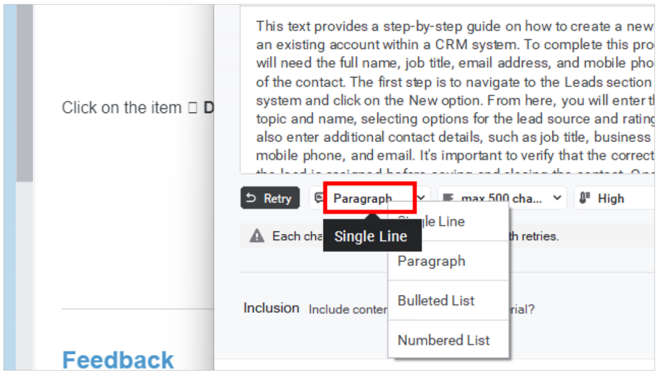
AdditionalText: This creates the summary of that particular recording. You can also edit and modify the summary based on your requirements.



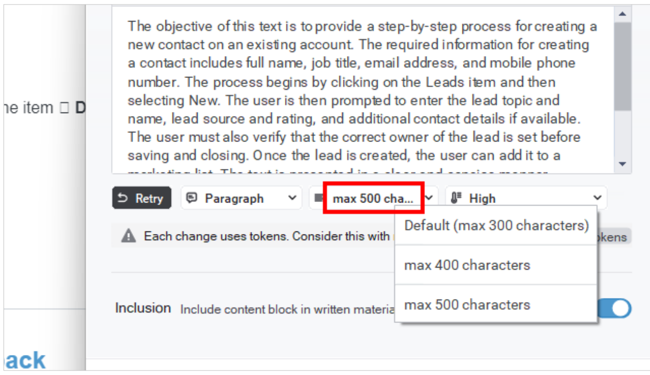
If you are unsatisfied with the current summarization, you can use the **Retry** option to create a new summarization.



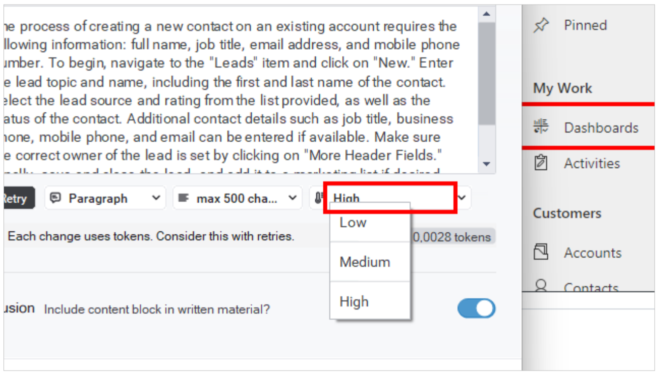
Click on the label **Single Line**, which allows you to change the format of your summary.



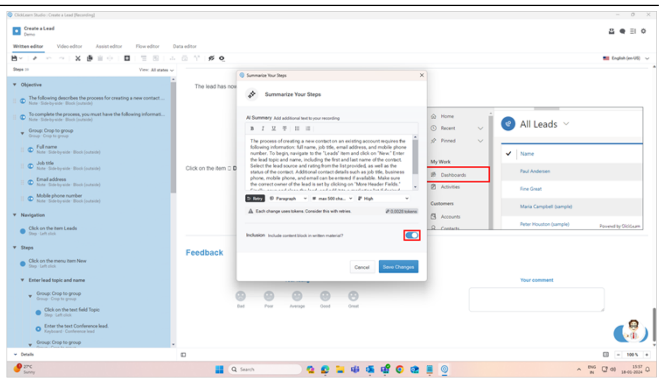
Click on the label **Default (max 300 characters)** to adjust the maximum response length.



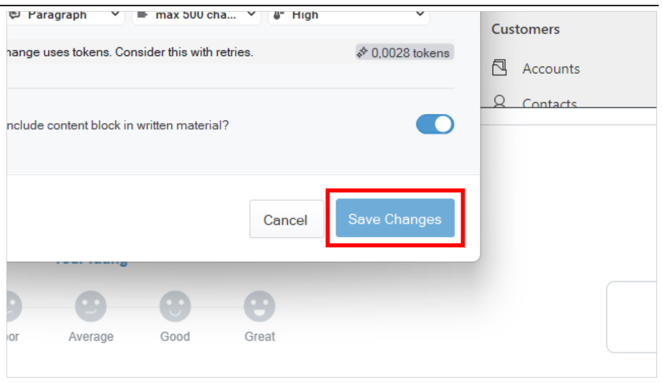
Click on the label **Low**, where you can adjust the temperature of the AI's response.



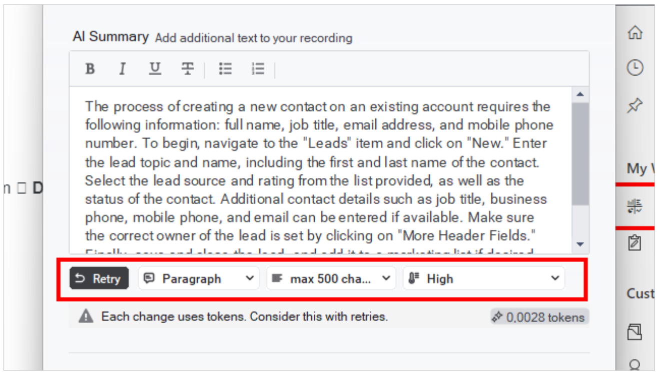
The **instruction off** switch lets you choose whether to include or exclude the summary from the recording.



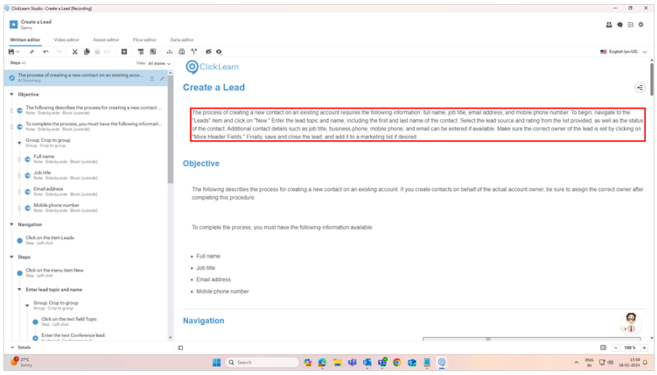
Click on the button **Save Changes**.



NOTE: Each change you make to the highlighted options will use tokens from that particular account.

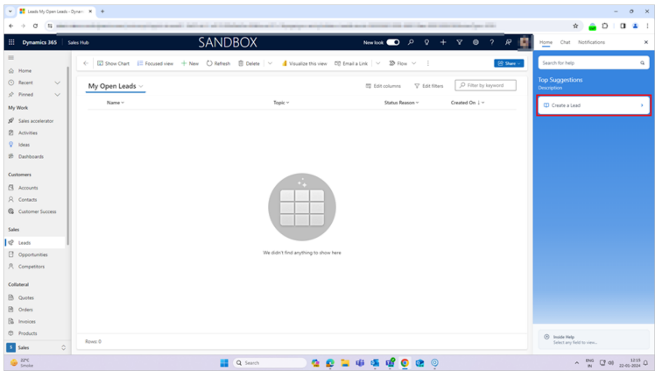


The recording starts with a summarization and then displays the list of steps. This is how the summarization looks like in a recording.

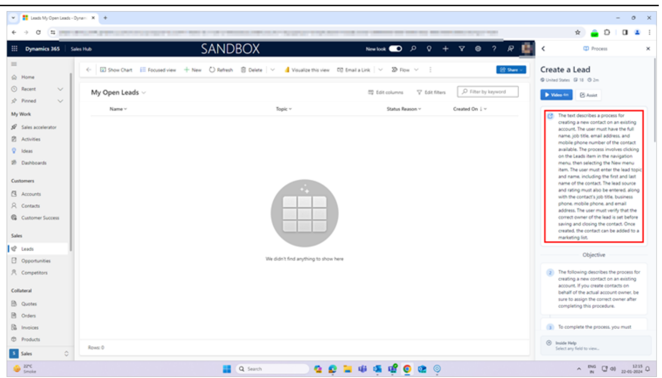


2.2.1.2. Recording in UXP Panel

You must produce and publish your project to reflect the changes on the UXP Panel.
Click on **Create a Lead**.

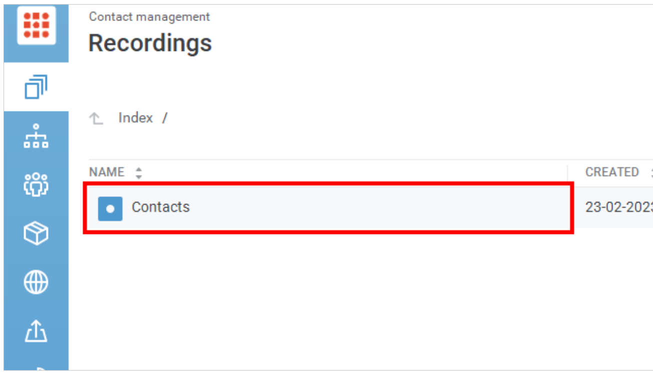


This is how the summarization looks like in the UXP panel.

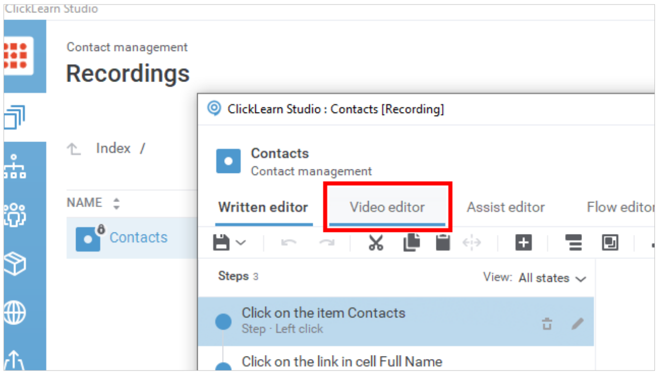


2.3. Use custom audio in recordings

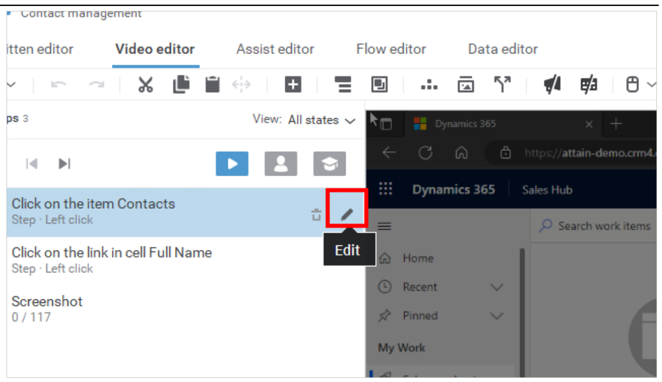
Open the recording in which you wish to add custom audio.



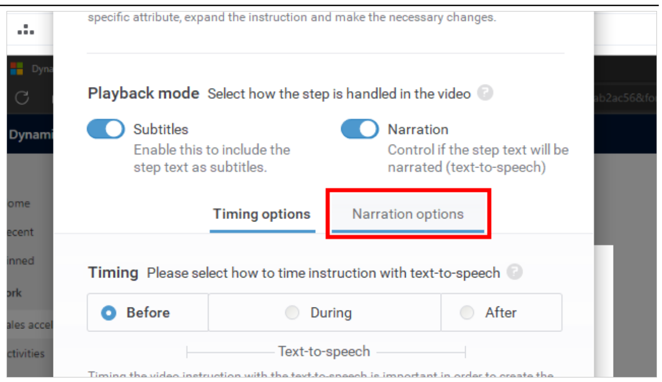
Click on the tab item **Video editor.**



Choose the step where you want to add custom audio.
Click on the button **Edit.**

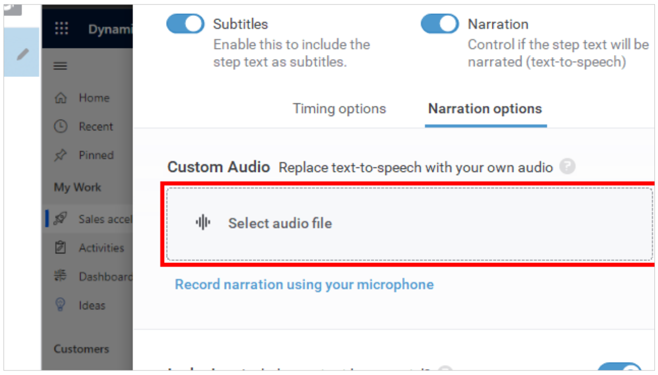


Click on the tab item **Narration options.**

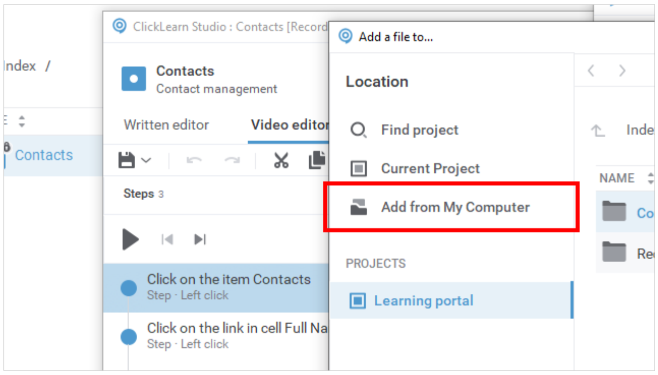


2.3.1. Add custom audio using an audio file

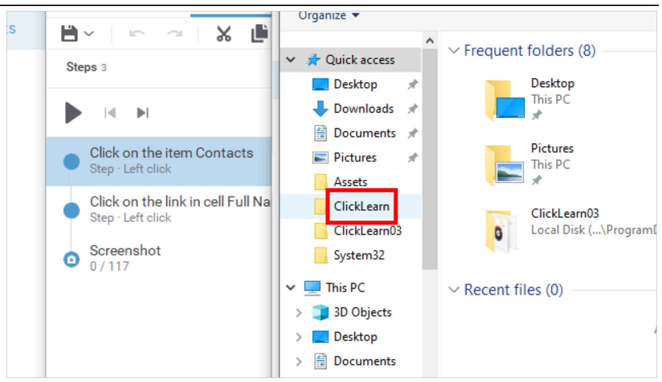
Click on the button **Select audio file.**
This option will allow users to choose an audio file from their local machine for the selected step.



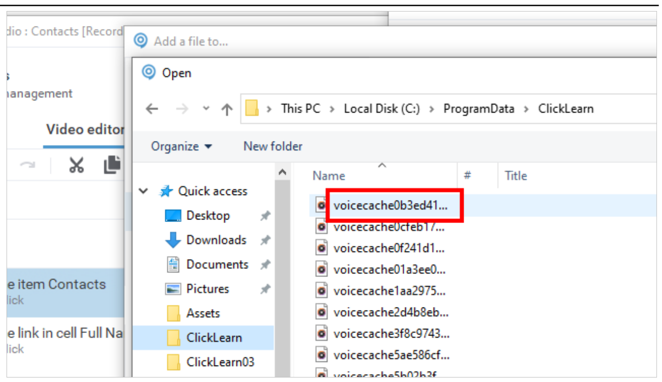
Click on the button **Add from My Computer**.



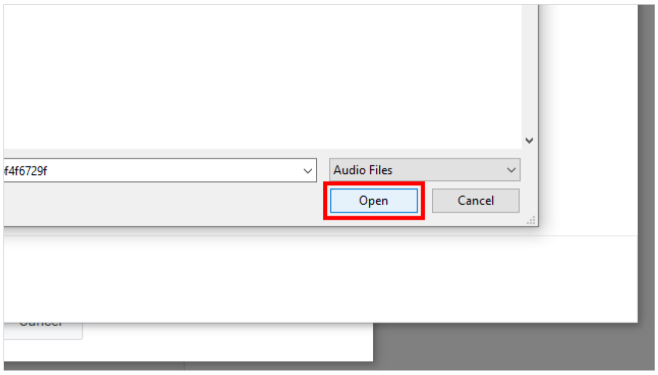
Click on the folder **ClickLearn**.



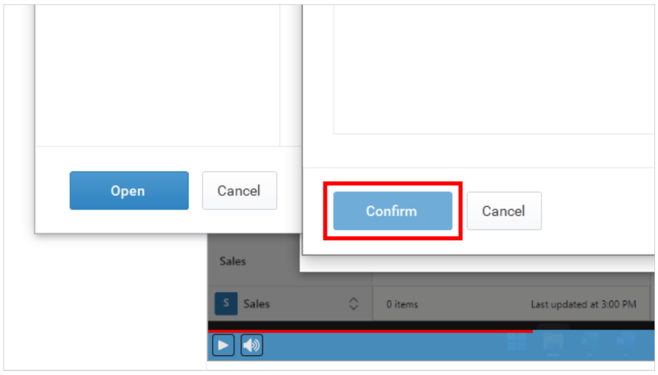
Select an audio file from your machine.



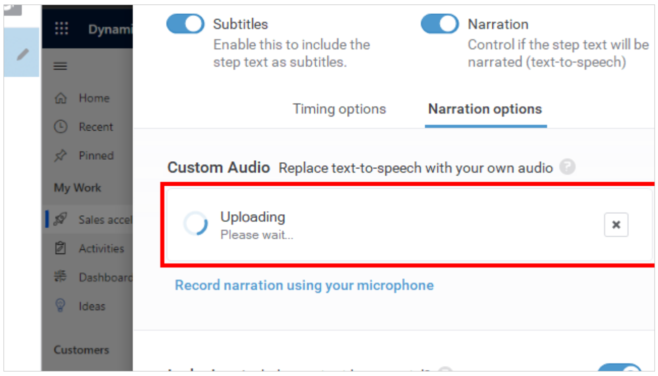
Click on the **Open** button.



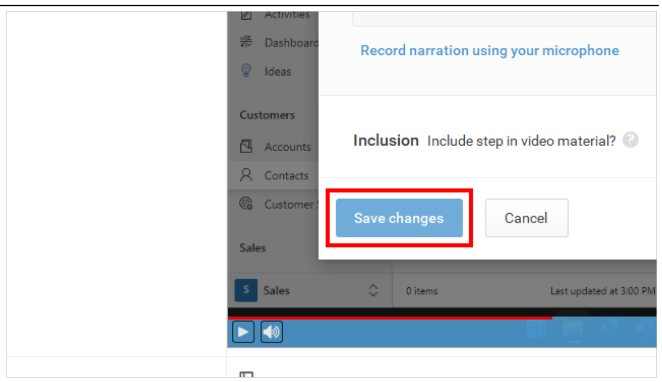
Click on the button **Confirm**.



Please wait until the audio is uploaded to your assets in ClickLearn cloud.

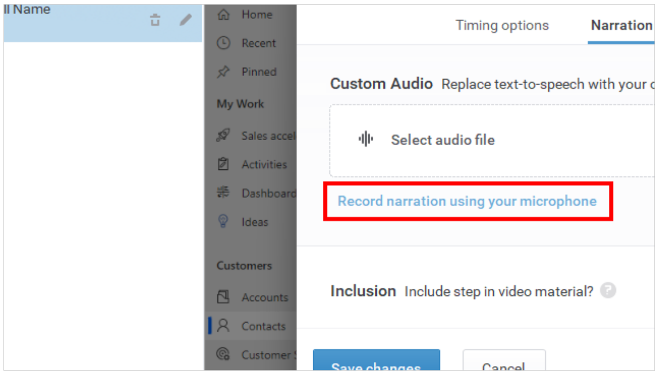


Click on the button **Save changes**.

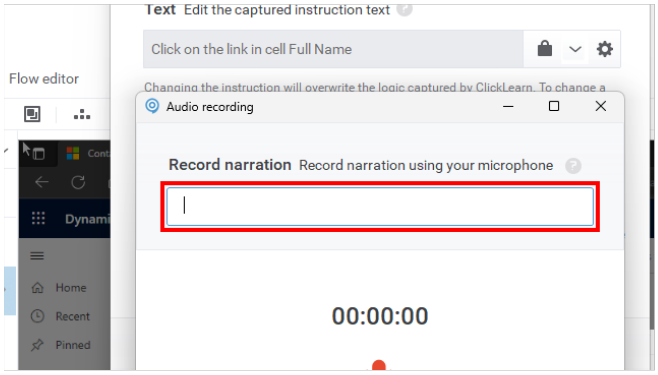


2.3.2. Record voice using a microphone

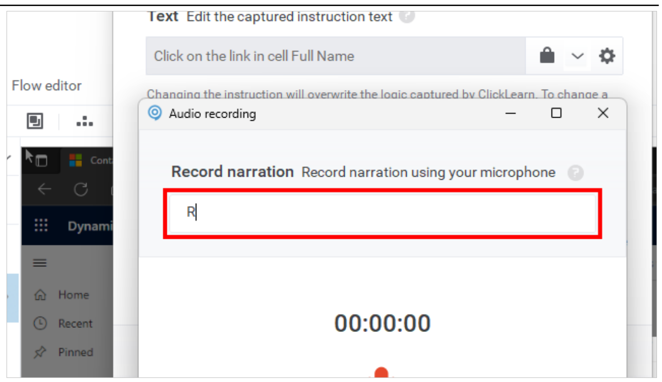
Click on the button: **Record narration using your microphone**.



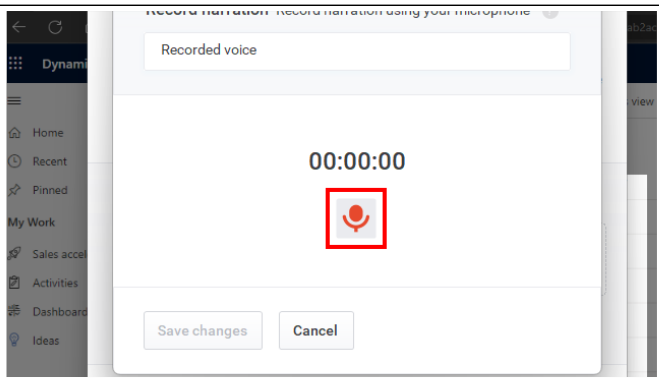
Click on the textbox **AudioName**.



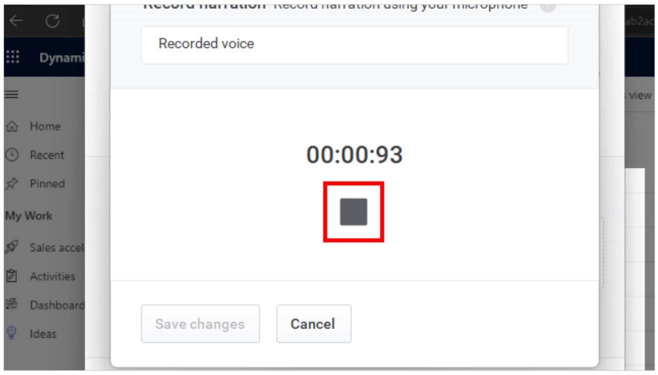
Enter **AudioName**.



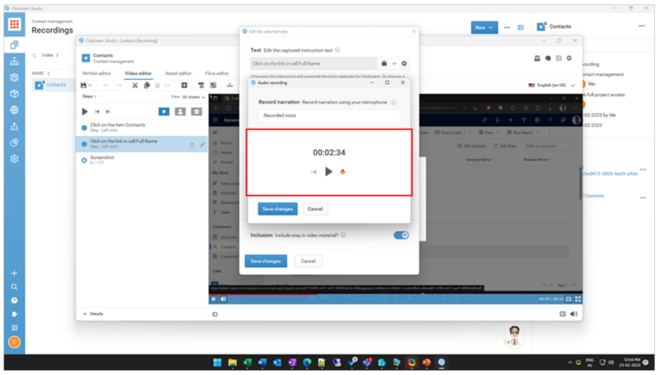
Click on the link icon, **Microphone.**
After clicking the Microphone button, sound from your PC's Microphone will be recorded until you click the stop button.



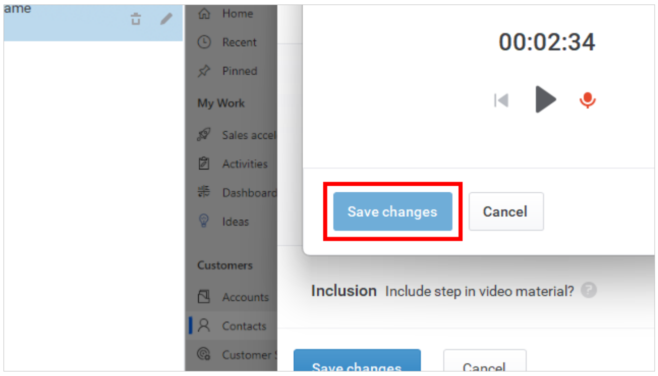
Click on the link icon: **Stop** after you have recorded your voice.



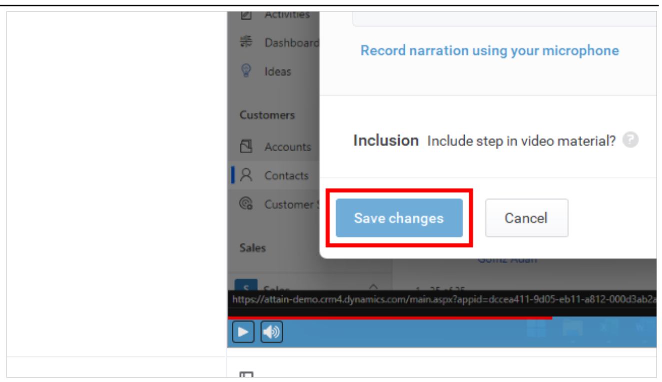
Here, you can playback your audio by clicking on the play button, and if you are not satisfied, you can re-record the audio.



Once you are satisfied with your audio recording, you can save it.
Click on the button **Save changes**.



Click on the button **Save changes**.



3. Structure and Segments

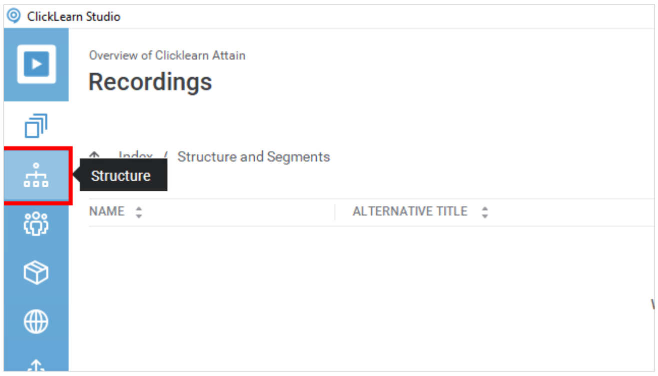
3.1. Overview of Structure and Segments

3.1.1. Introduction

You need to arrange your recordings and assets in a structure that helps your users learn quickly.

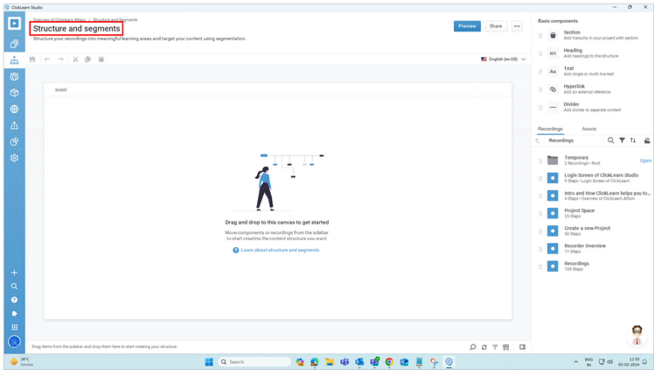
A **structure** is a way of sorting and naming your content based on user needs. You can also personalize the look of your portal by changing the icons and colors of the elements in the structure.

To view this, click on the button **Structure.**



3.1.1.1. Overview of Structure

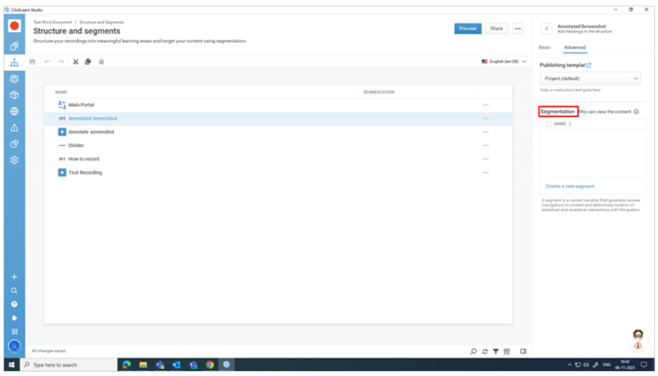
Structure and segments: This is what a structure screen looks like.



3.2. Create a segment

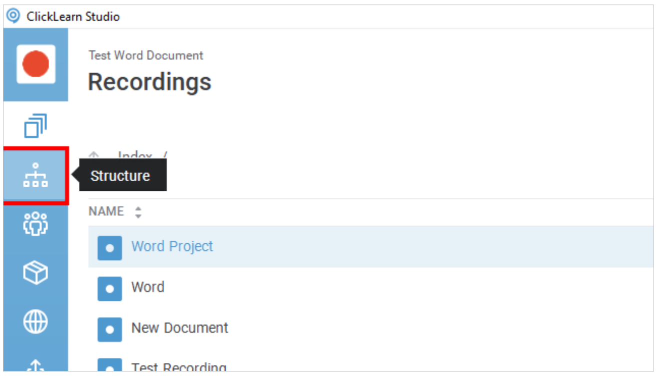
3.2.1. Introduction

Segmentation enables you to create different segments of the content you have in your structure. Segmentation allows you to create multiple variations of your content from a single project and publish them.



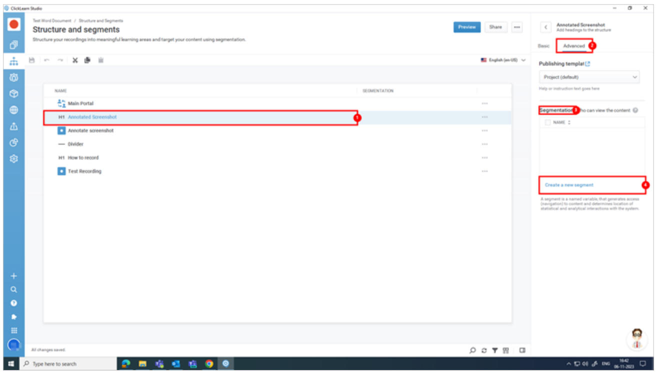
3.2.1.1. Create a segment

To create a segment, click on the button **Structure**.

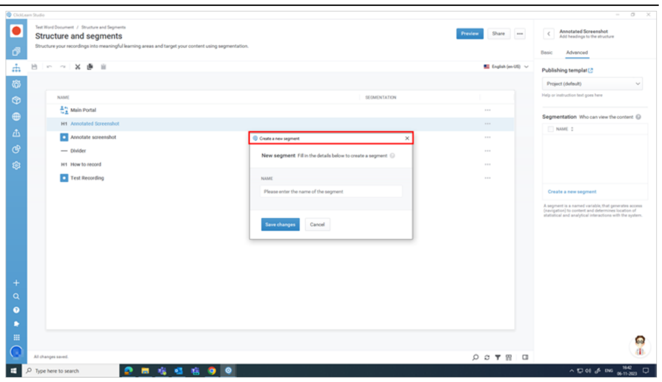


Create a segment

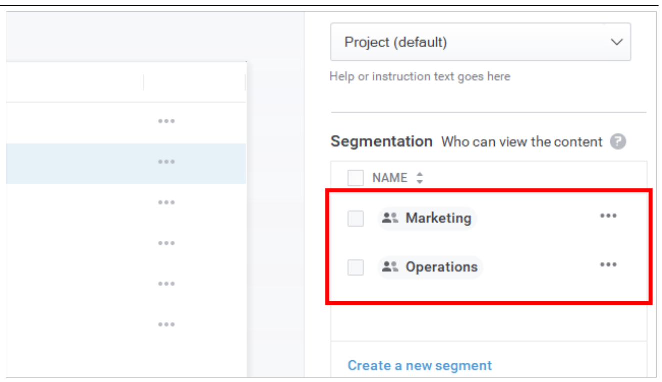
1. You can select any grid cell from your structure screen. Click on the grid cell **NAME** with the value **Annotated Screenshot**.
2. Click on the tab item **Advanced**.
3. Under **Segmentation**, you can find a button to create a new segment.
4. Click on the button to **Create a new segment**.



A new dialog opens up, which helps you **Create a new segment**. Enter the name of the segment you wish to create and click on Save changes.



We have created two segments: **Marketing** and **Operations**.



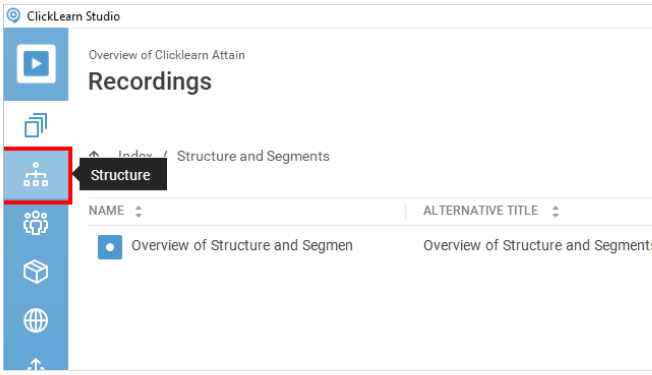
3.2.1.2. Segmentation Example

For example, you have ten recordings intended for two specific user groups: **Marketing** and **Operations**. Segmentation enables you to allocate these recordings according to their relevance to each group. For instance, you could assign four recordings to the Marketing segment and six to the Operations segment. Segmentation allows you to create dedicated links for these segments, allowing you to share the Marketing link exclusively with the Marketing team and, similarly, the Operations link with the Operations team.

3.3. Basic components

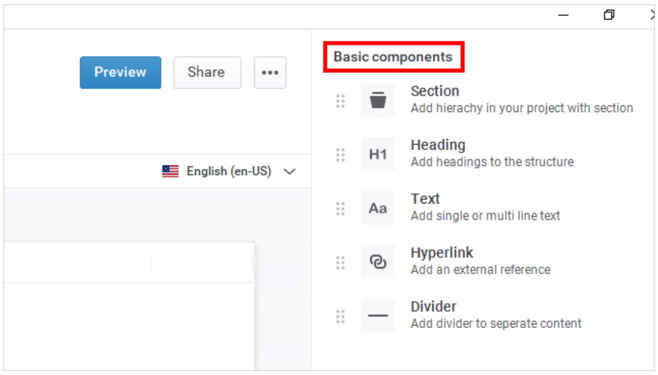
3.3.1. Basic components

Click on the button **Structure**.



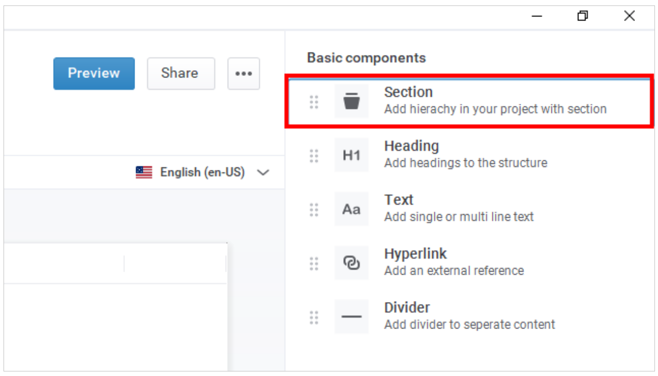
Let's get to know the essential components associated with structure. Following are the basic components as described below.

Click on the label **Basic components**.



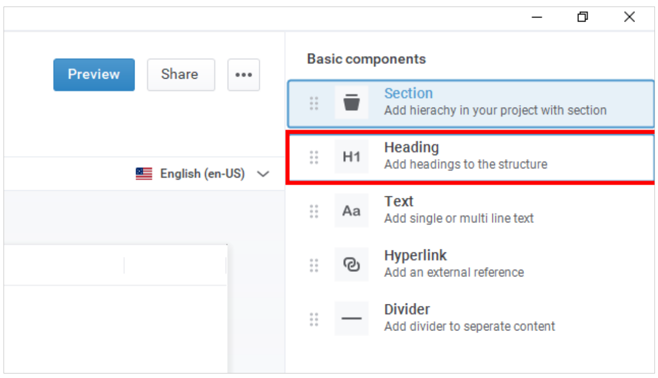
3.3.1.1. Section

Section: A section is a component that helps you to organize your learning content. You can add sections to your structure by dragging and dropping them from the right-side pane to the center of the application.



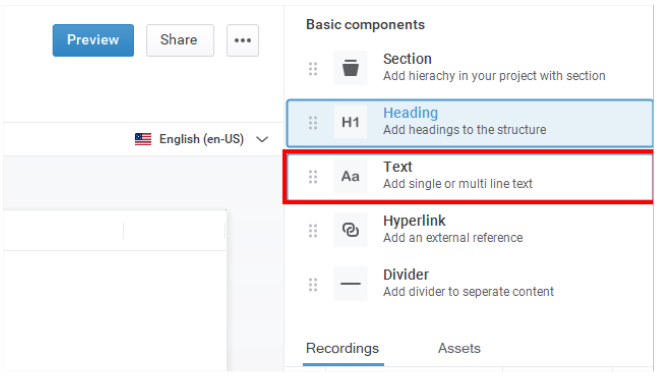
3.3.1.2. Heading

Heading: You can introduce the main topic of your learning portal by using the heading function. You can also use it to separate different types of recordings and assets. You can also set other properties for each heading, like title, font size, etc.



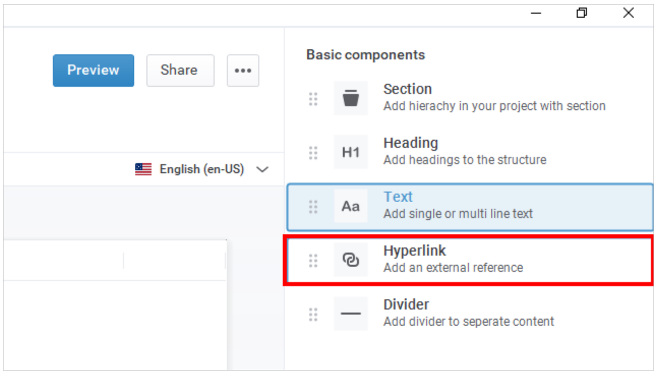
3.3.1.3. Text

Text: With the help of this function, you can add a single, multi-line text. You can also edit properties like font size, color, etc.



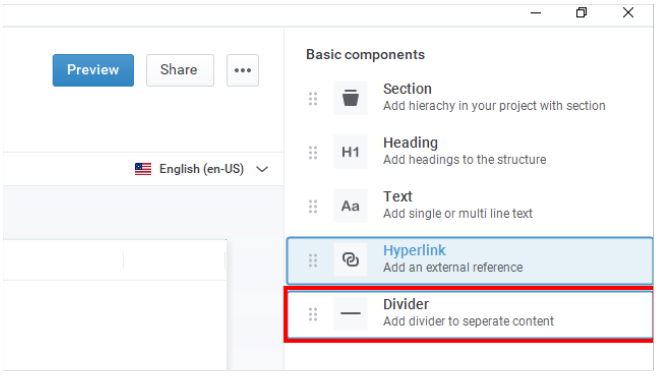
3.3.1.4. Hyperlink

Hyperlink: The hyperlink function adds an external reference link on your learning portal that takes learners to other online sources or materials. You can use the hyperlink function to provide additional references, examples, or explanations for your learners. You can also edit properties like title, URL, etc.



3.3.1.5. Divider

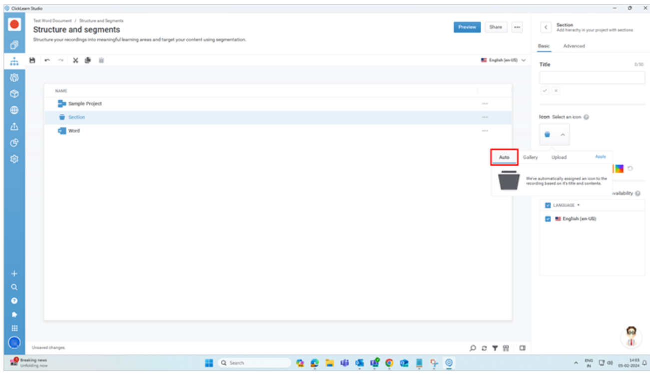
Divider: Creating a line break in your learning portal structure is easy with the divider feature in ClickLearn Attain. You can divide different sections or elements to make your content more organized and precise.



3.4. Properties of basic components

3.4.1. Common properties of basic components

3.4.2. Basic settings



Listed below are the common properties of the basic components associated with the structure.
Title: You can rename the component in your structure based on your requirements.

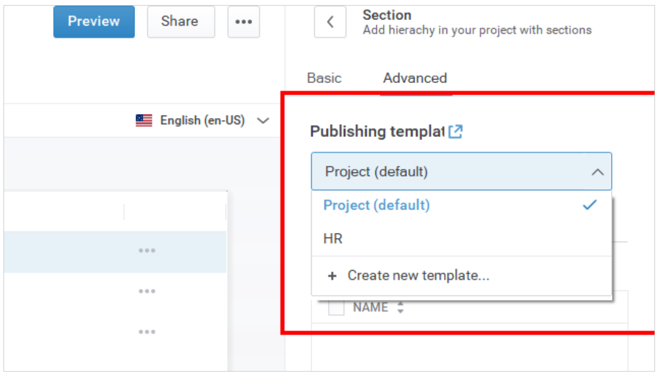
Icon: You can set up the icon for your learning portal. You have three options available.

- **Auto:** ClickLearn will automatically assign an icon to the recording based on its title and contents.
- **Gallery:** You can select an icon from the available options in ClickLearn based on your needs.
- **Upload:** You can upload your icon. To upload an icon, you can use drag and drop or browse your local computer to choose the icon you wish to upload.

Color: You can set up the icon's color based on your requirements.

Languages: You can also set up which languages the element is available for.

3.4.3. Advanced settings

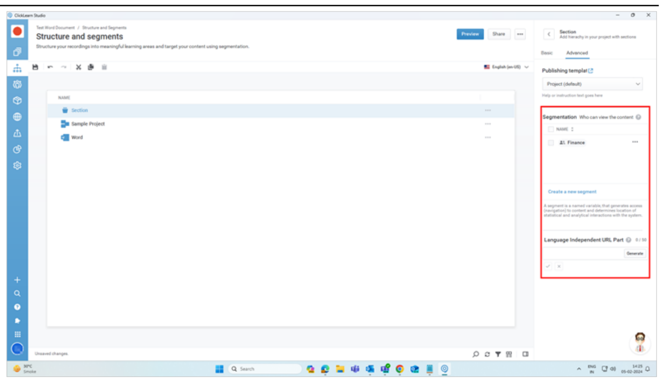


Publishing Template: The publishing template feature lets you modify your portal's look and content.

Project (default): This is the default project template of your project.

Create a new template: You can use the create a new template function to create your template based on your project needs.

In our case, we have created a new template named **HR**.



Segmentation: You can set up the segments where the element should be available. Segmentation allows you to target your content. You will get one URL for deployment for each segment you create.

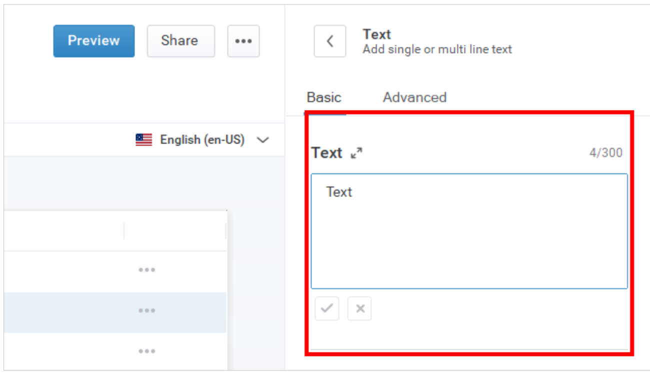
Create a new segment: You can also create a new segment. You just need to enter the name of the segment and save changes.

In our case, we have created a new segment named **Finance**.

Language-independent URL part: Add the LIUP name to access the selected recording or section using this name in your content URL.

3.4.4. Text

Text: You can add a single or a multi-line text here. The **limitation** of using Text is up to **300** characters. If you wish to format your Text, click the expand button next to the **Text**.



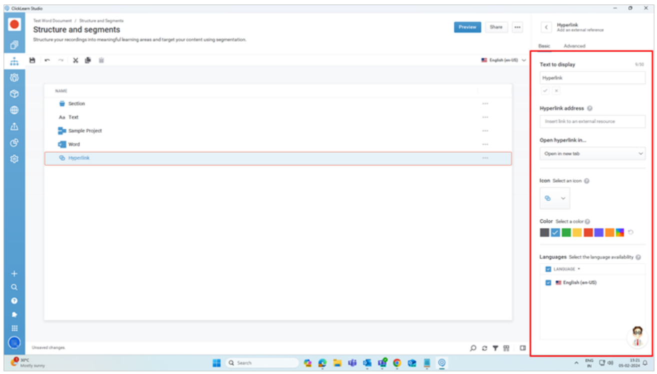
3.4.5. Hyperlink

Text to display: You need to enter the Text for the link you want to show on your portal. The Text should be at least 50 characters.

Hyperlink address: Enter the page's web address or resource you want to link to. A hyperlink will let your users access it from your portal.

Open hyperlink in: Choose how you want your users to open the hyperlink. You have three options:

- Open in a new tab.
- Open in a new window.
- Embed in the learning portal.

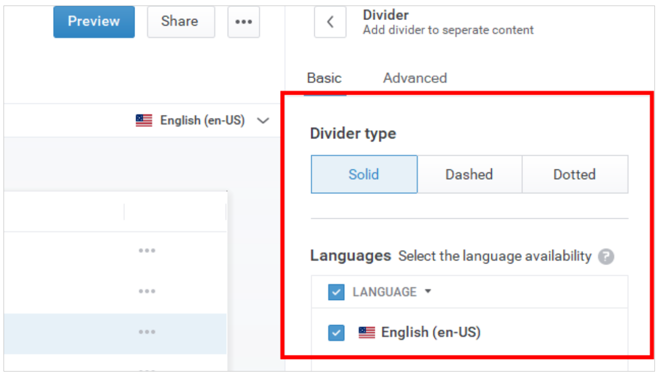


3.4.6. Divider

Divider: A divider is a horizontal line you can add to your learning portal structure. By separating different sections or elements, you can use it to make your portal more organized and visually appealing.

There are three types of dividers you can choose from.

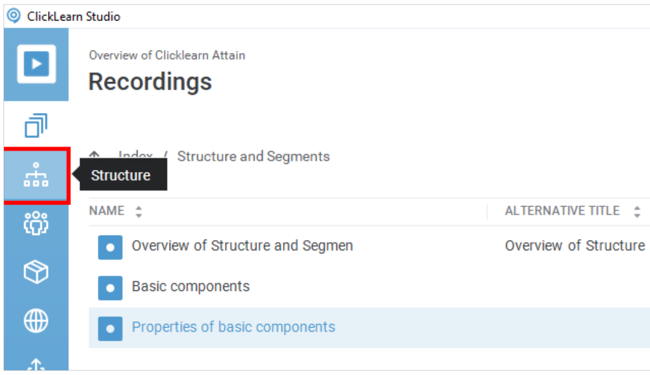
- **Solid:** This will display a solid line.
- **Dashed:** This will display a dashed line.
- **Dotted:** This will display a dotted line.



3.5. Add Recordings and assets to structure

3.5.1. Recordings and Assets

To access the essential components (recordings and assets) in the structure. Click on the button **Structure**.

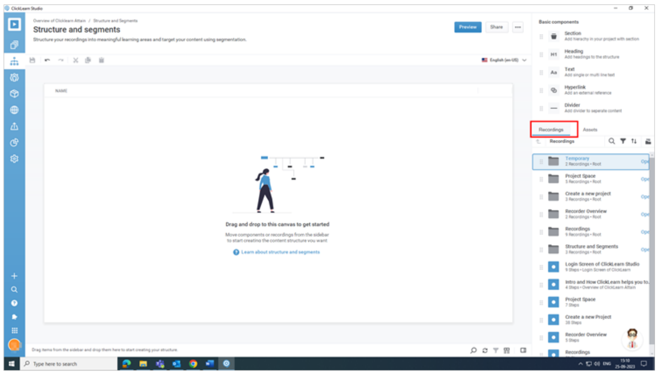


3.5.1.1. Recordings

Click on the tab item **Recordings.**

Recordings are the basic units of content that capture the steps of a process.
You can group your recordings into one or more projects according to your needs.

It will display the list of recordings for that specific project. You will be able to see the folder that has your recordings for a particular project.



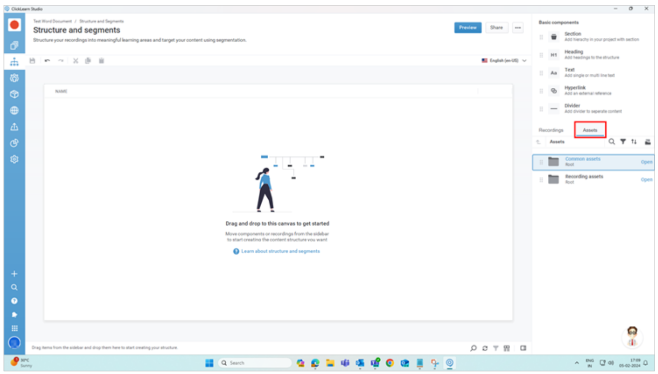
3.5.1.2. Assets

Click on the tab item **Assets**.

Assets are the files or folders you can upload to your project directory and use in your recordings.

For example, if you add external images to your recordings, you can store them in the common or recordings assets.

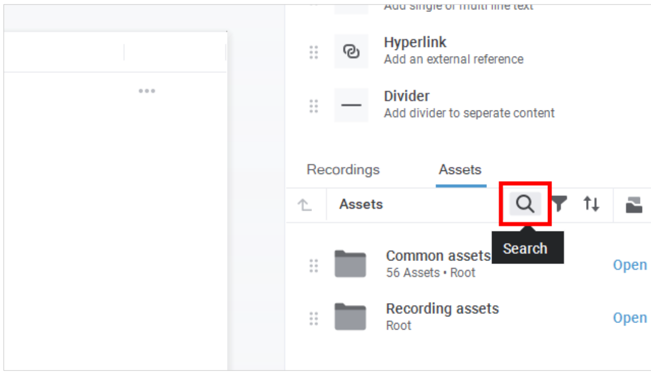
You can use two default folders to store the assets: the **common** and **recordings assets** folders or create your root asset folder.



3.5.1.3. Other basic elements associated with recordings and assets

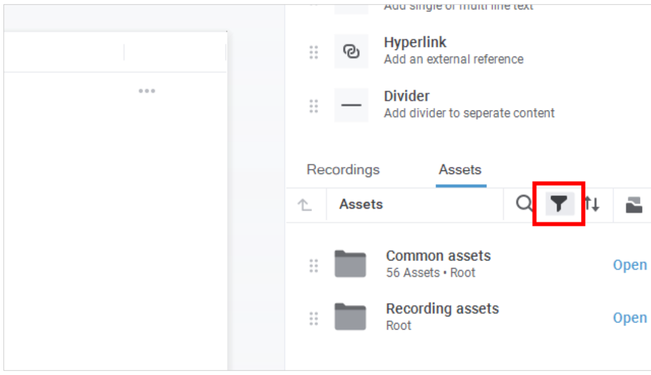
3.5.1.3.1. Search

Search: This feature lets you search for the recordings and assets from the respective tabs.



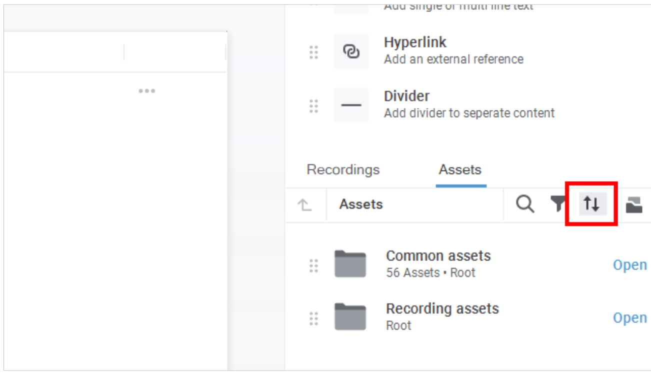
3.5.1.3.2. Filter

Filter: By selecting the column and type from the list, you can use this feature to find the structures you want and navigate through complex lists easily. You can also specify your search criteria to suit your needs.



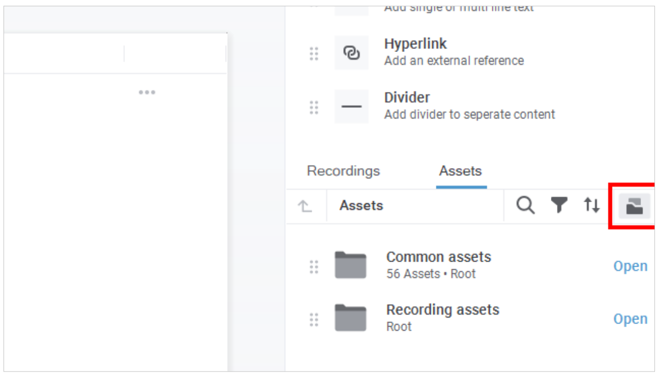
3.5.1.3.3. Sort

Sort: This feature can arrange the recordings and assets to suit your project needs best. You can also choose your criteria to sort according to your preferences.



3.5.1.3.4. Explorer

Explorer: You can use this to view the folders that belong to the current project. You can also use this option to include files and recordings in your project.

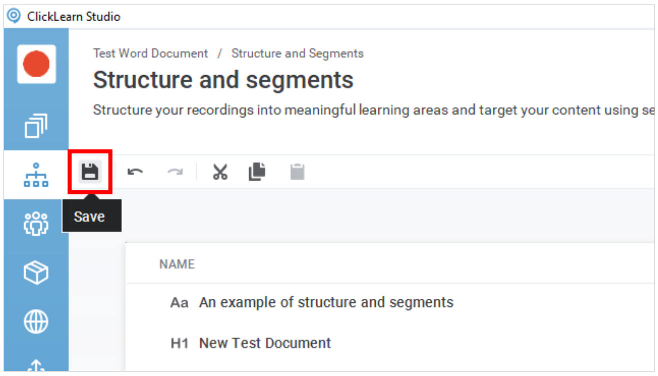


3.6. Tool Strip Buttons

3.6.1. Tool strip buttons

3.6.1.1. Save

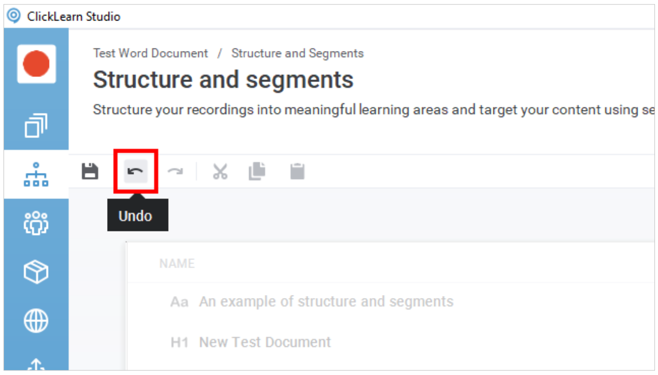
Let's get to know the essential elements associated with structure and segments.



Save: You can use this function to save the structure.

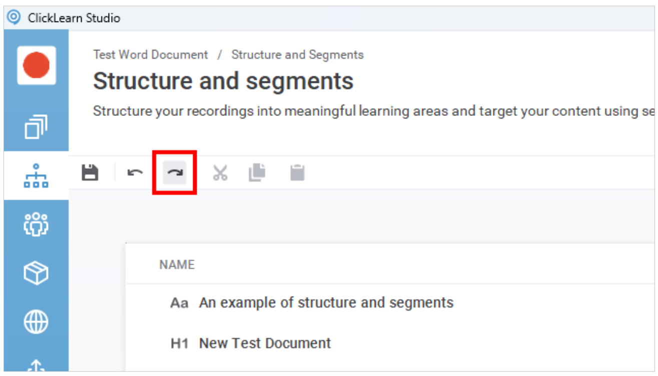
3.6.1.2. Undo

Undo: The undo function is a feature that allows you to revert the structure to the last action.



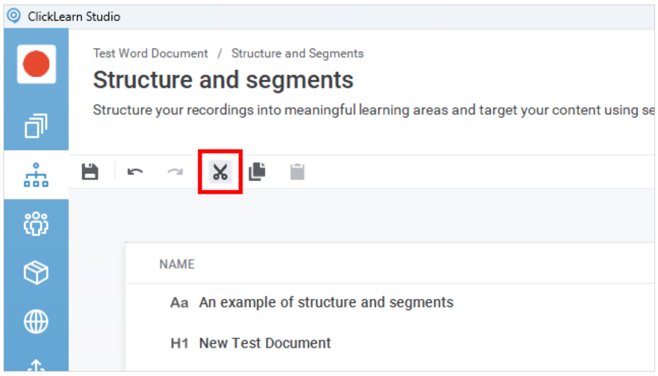
3.6.1.3. Redo

Redo: The redo function lets you restore the last action or a sequence of steps you have reversed with the undo function.



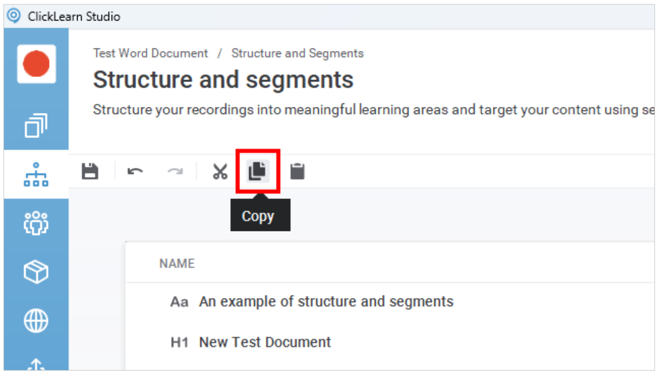
3.6.1.4. Cut

Cut: You can use this function to relocate the original structure element and paste it to a different location of your choice.



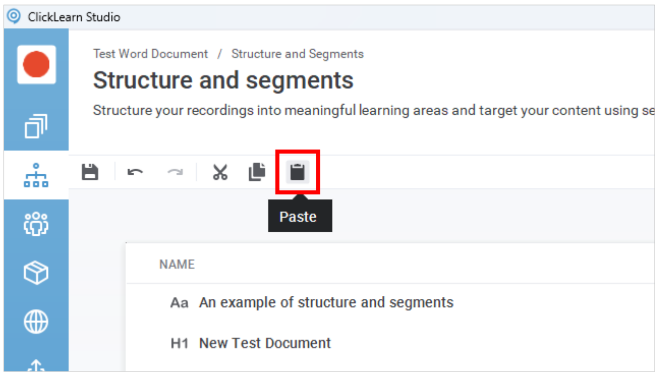
3.6.1.5. Copy

Copy: You can copy the structure element you have selected.



3.6.1.6. Paste

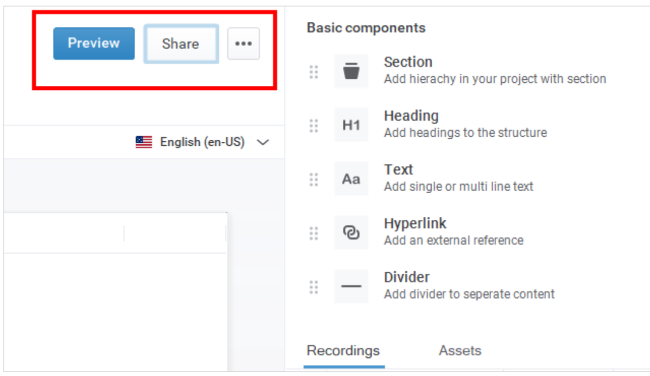
Paste: Paste will save the copied structure element at the chosen location.



3.7. Preview, Share, and More

3.7.1. Top right corner elements of structure

Preview: With the preview feature in ClickLearn Attain, you can preview your learning content as a web page before you publish it.



Preview helps you verify and improve the quality and accuracy of your recordings.

Share: We have a detailed recording for the **share** function in **Recordings >> More**.

More: More function offers four different options.

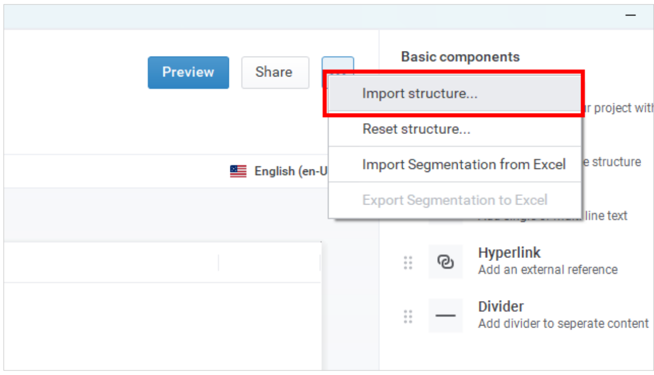
3.7.2. More

Import structure: You can import structure from a specific project using the import structure.

Reset structure: This function restores the original state of the structure.

Import Segmentation from Excel: This function helps import segmentation from an Excel file into the application.

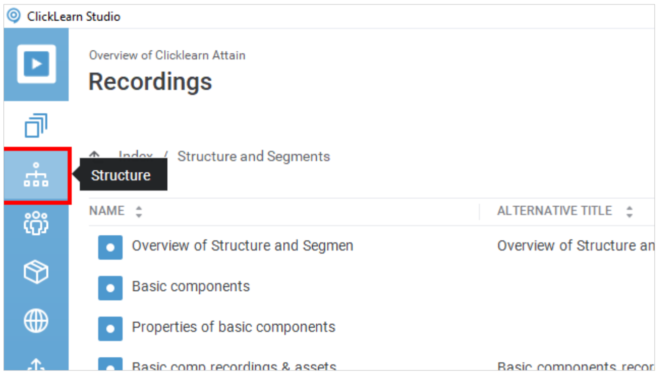
Export Segmentation to Excel: This function allows you to export your segmentation to an Excel file.



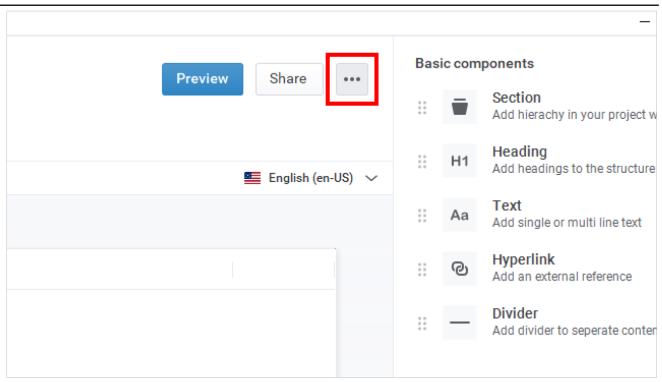
3.8. Import structure

3.8.1. Import structure from another project

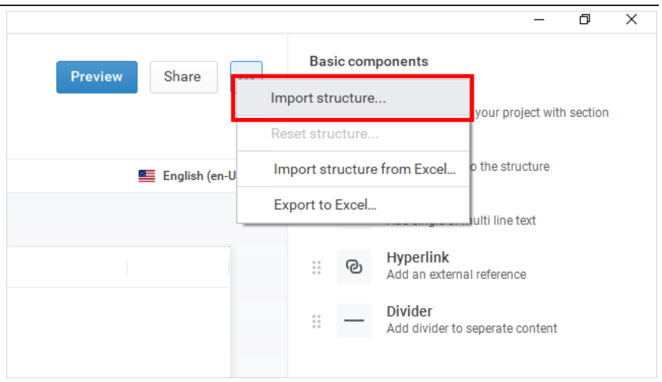
Click on the button **Structure**.



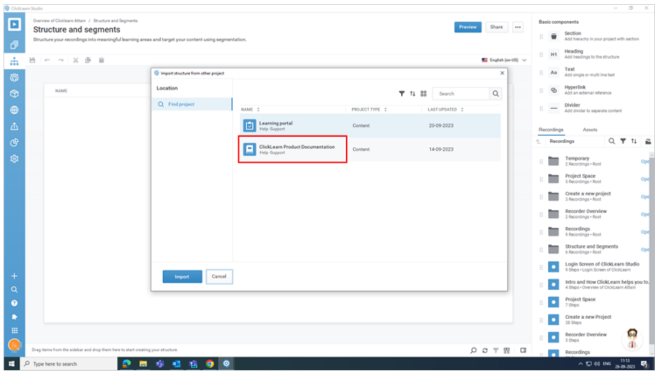
Click on the icon **Structure More**.



Click on the menu item **Import structure**.



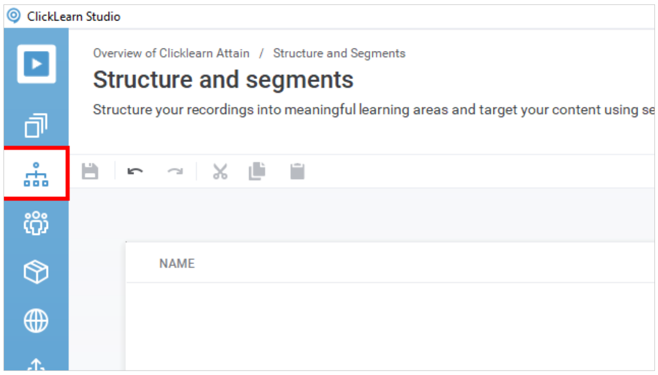
The import structure button opens a new pop-up called "**Import structure from other project**" that shows you the projects you can choose from to import the structure.



3.9. Functions at the bottom right corner

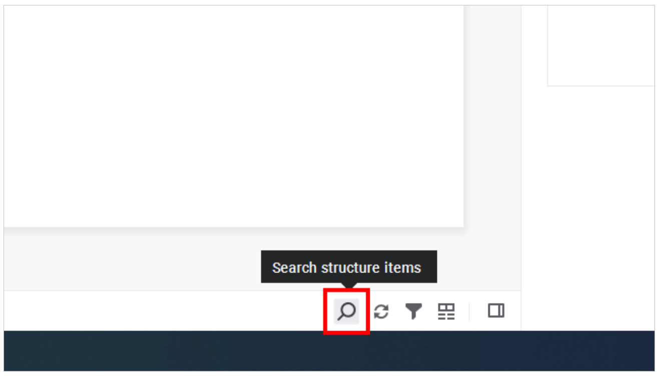
3.9.1. Other functions of structure and segments

Click on the button **Structure**.



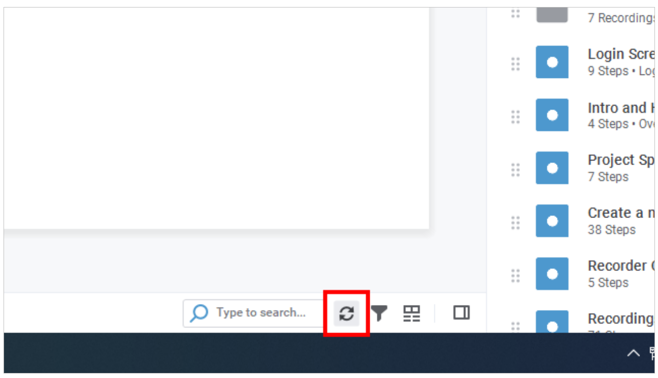
3.9.1.1. Search

Search: This function allows you to **Search structure items** you seek.



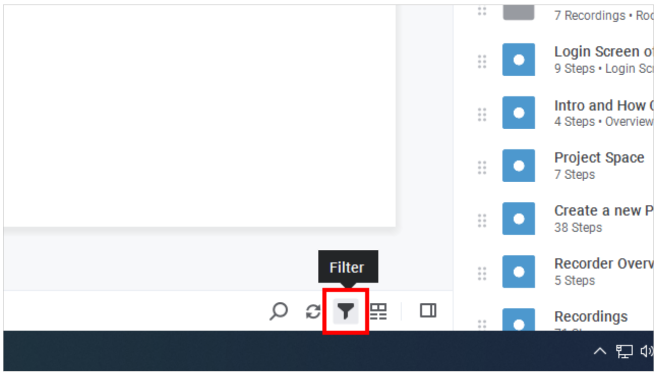
3.9.1.2. Refresh

Refresh: Refresh reloads or updates what is displayed or stored on a device.



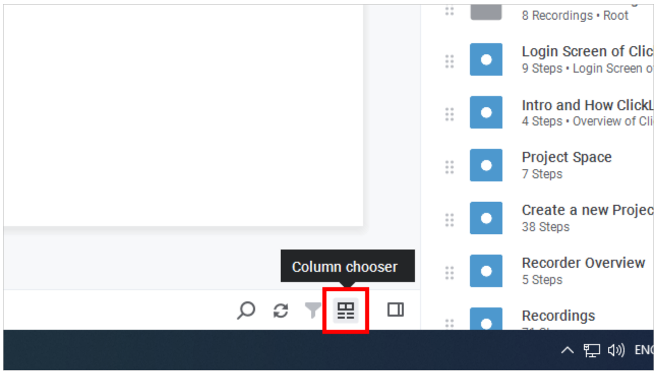
3.9.1.3. Filter

Filter: By selecting the column and type from the list, you can use this feature to find the structures you want and navigate through complex lists easily. You can also specify your search criteria to suit your needs.



3.9.1.4. Column Chooser

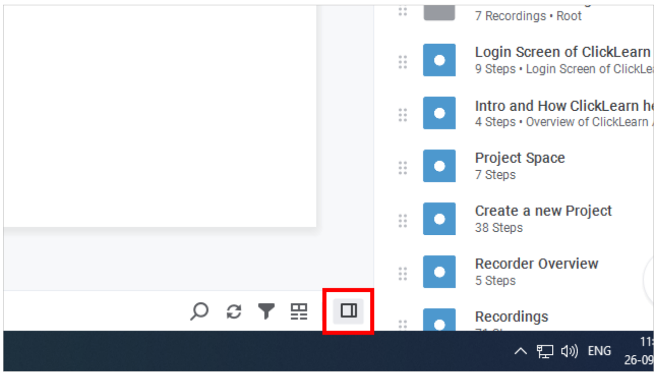
Column chooser: This feature lets you customize the main screen of the structure by selecting the columns you want to see. Below are the columns you can add to your structure based on your needs.



- Name
- Divider type
- Hyperlinkref
- Information
- Language
- Language-independent url part
- Publishing template
- Segmentation
- Type

3.9.1.5. Collapse

Collapse: The **Hide Show Right Pnl** shows or hides the panel on the right side of the screen.

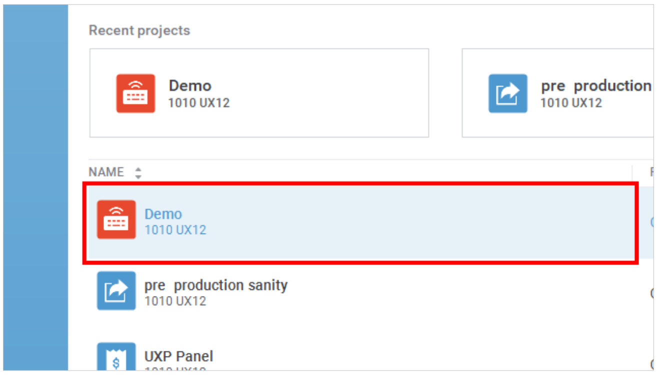


3.10.Import Segmentation from Excel

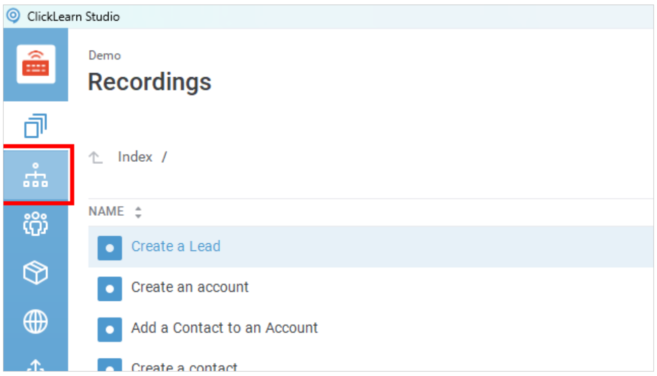
3.10.1. Import Segmentation from Excel

Import Segmentation from Excel: To effectively use this feature, you can initiate the process by exporting the current segmentation into an Excel file. You can then make the necessary changes to the exported file, such as assigning recordings to existing or new segments or creating entirely new segments. After making these changes, you can save them and import the Excel file, updating the segmentation to reflect the recent edits.
Select the project for which you wish to import segmentation.

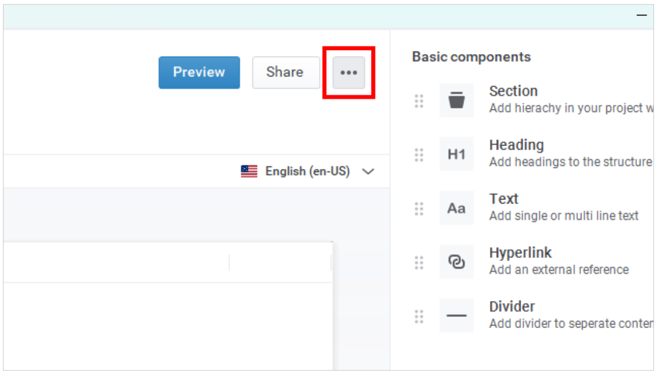
Double-click on the grid cell **NAME** with the value **Demo**.



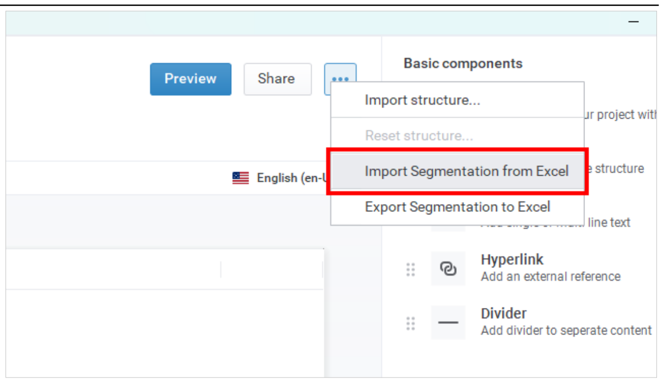
Click on the button **Structure**.



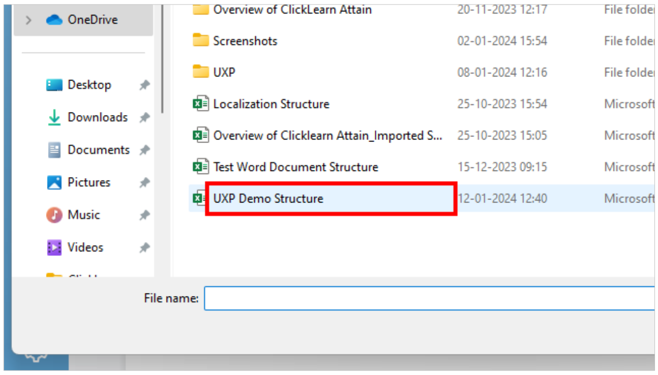
To import segmentation, click on the icon **Structure More**.



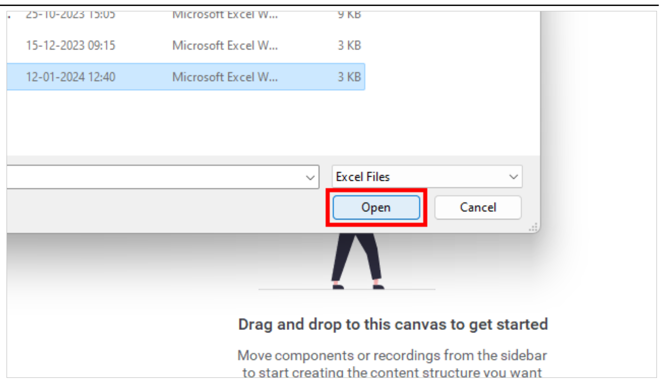
Click on the menu item **Import Segmentation from Excel**.



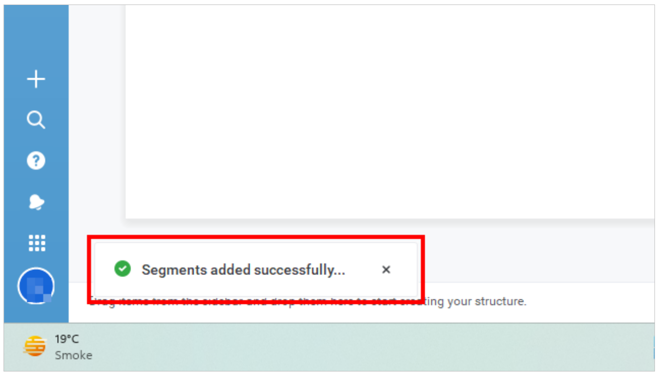
Select the Excel file to import.



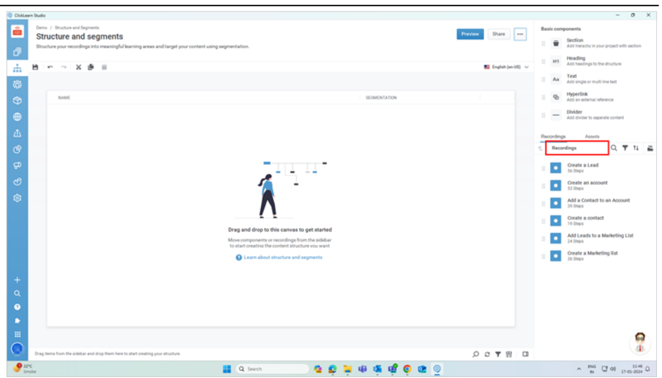
Click on the **Open** button. You may also press **Alt+O**.



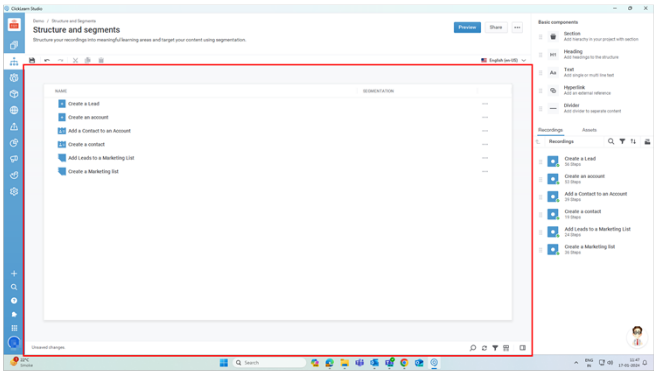
After importing the segments from the Excel file, a pop-up message at the bottom left displays, showing they were successfully added.



Select the **Recordings** for segmentation.

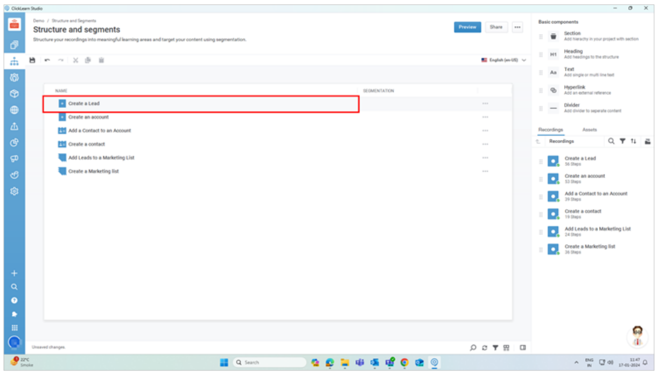


The recordings are now a part of the structure panel. We need to segment these recordings based on the segments we have imported.

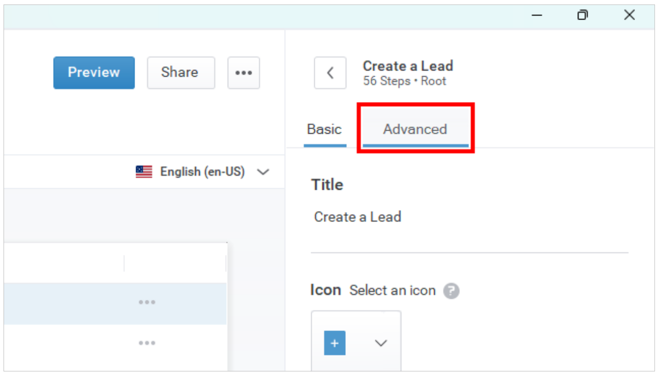


3.10.1.1. Assigning segments to each recording

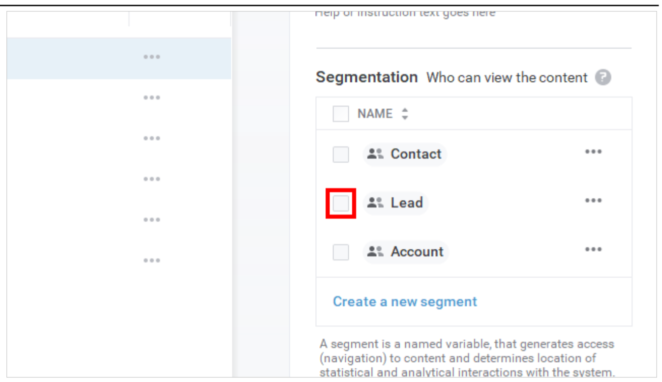
Click on the grid cell **NAME** with the value **Create a Lead**.



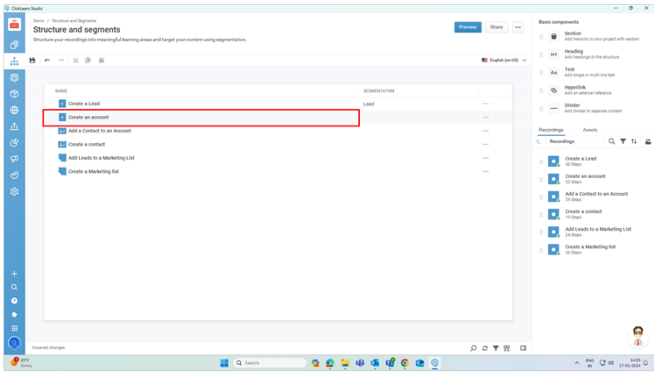
Click on the tab item **Advanced**.



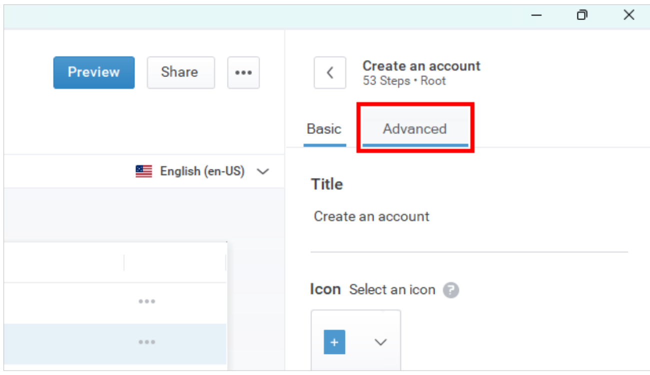
Click on the checkbox **Lead**.



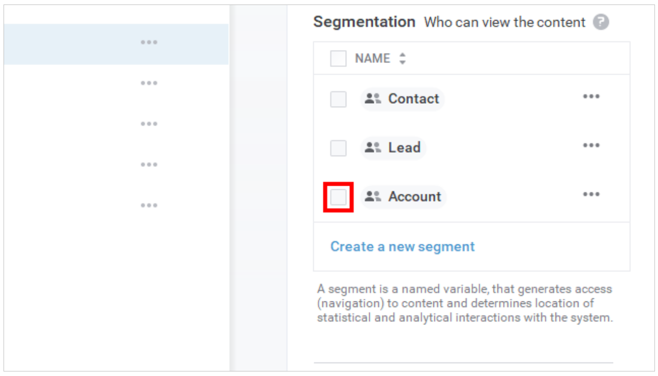
Click on the grid cell **NAME** with the value **Create an account.**



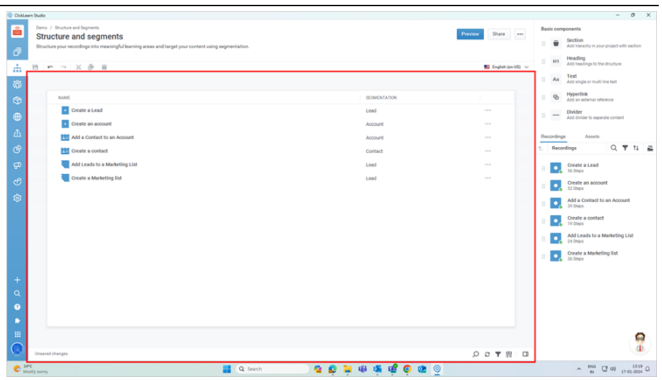
Click on the tab item **Advanced**.



Click on the checkbox **Account**.



Similarly, we will assign a segment to each recording based on its content.

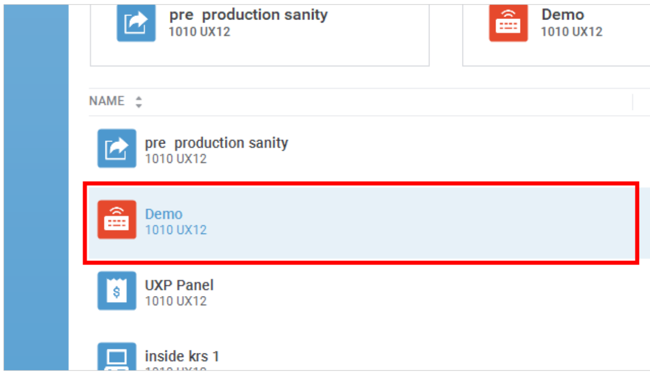


3.11.Export Segmentation to Excel

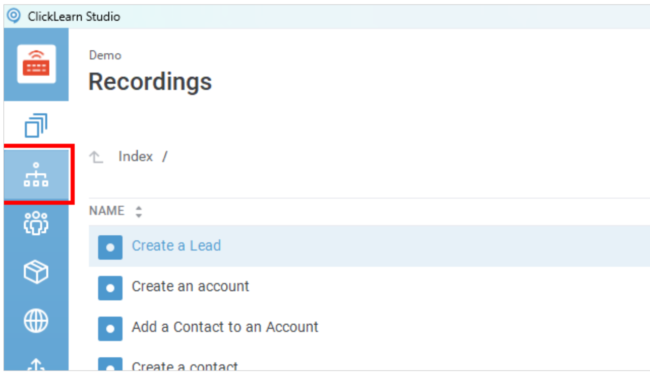
3.11.1. Export Segmentation to Excel

Exporting segmentation to Excel adds the segments from the current project to the Excel file.
Select the project for which you wish to export segmentation.

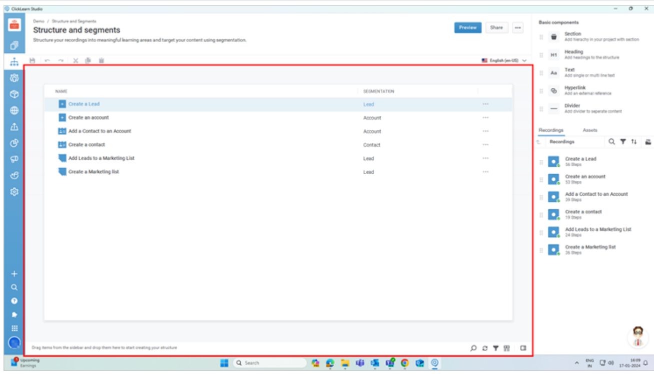
Double-click on the grid cell **NAME** with the value **Demo**.



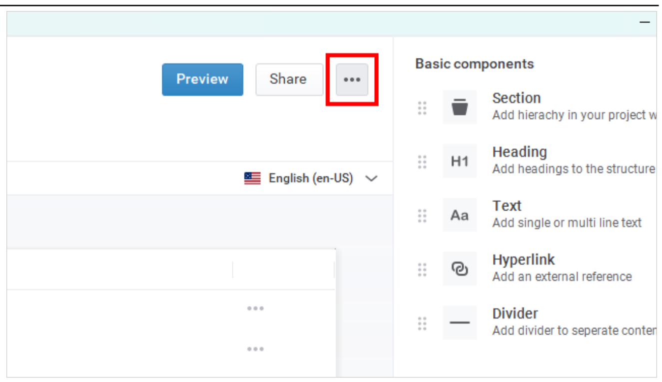
Click on the button **Structure**.



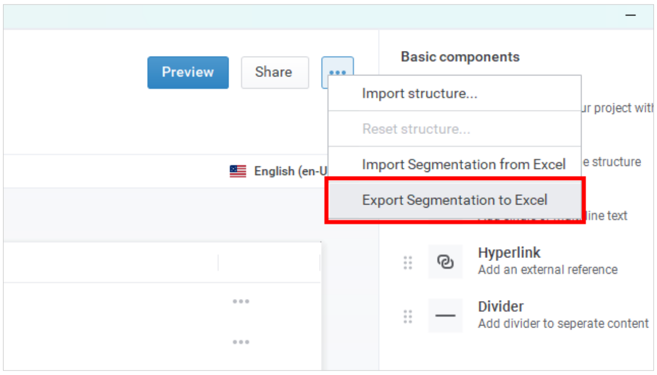
This project has split the recordings into different segments.



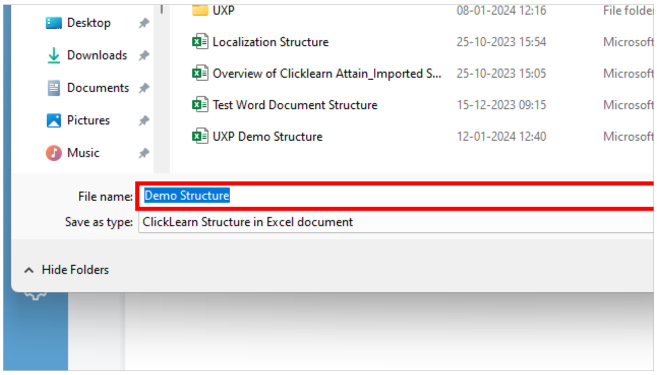
To export segmentation, click on the icon **Structure More**.



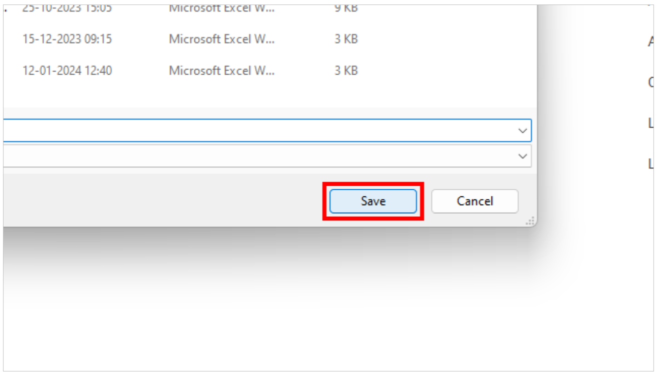
Click on the menu item **Export Segmentation to Excel**.



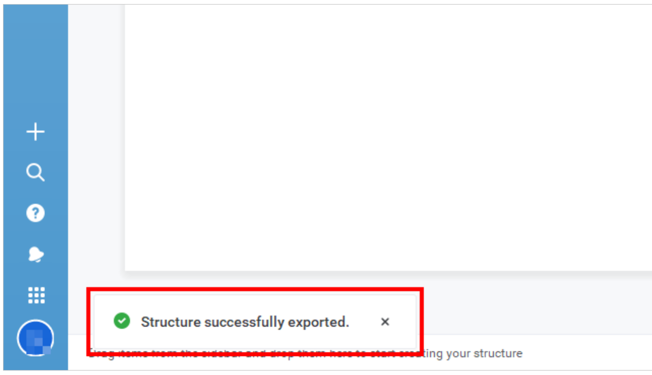
You can choose the location where you want to save the file.



Click on the **Save** button. You may also press **Alt+S**.

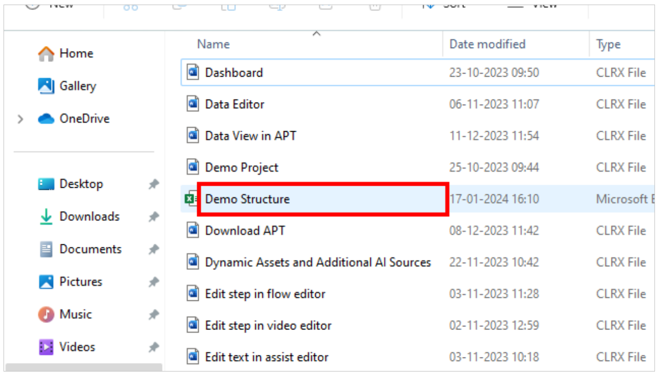


After successfully exporting the segments, a notification appears in the bottom-left corner stating, '**Structure successfully exported.**'

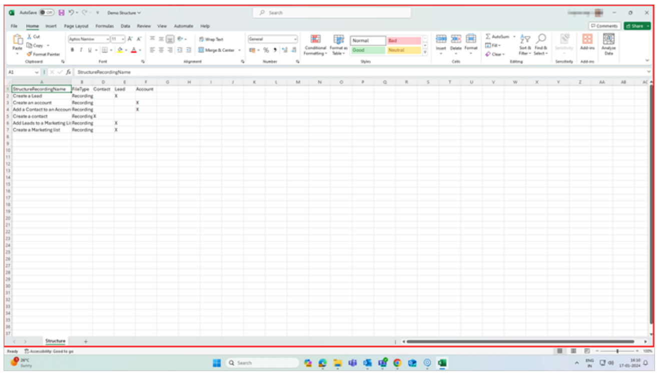


3.11.1.1. View the exported Excel file.

Select and open the file from the location where you saved it.



This is what the exported file looks like. The recording is in the segment with an "**X**" below its name.
Within the Excel sheet, you can add new segments, modify or delete earlier ones, and assign recordings to other segments.



3.12. Copy from published

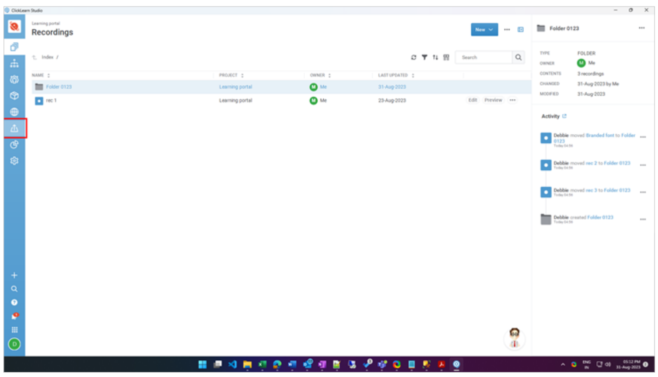
3.12.1. Introduction

Using the "Copy from published" feature, you can import the recordings from an already published project into the current project. The produced and published recordings will be imported into an existing project. Below are the step-by-step instructions on how to do it.

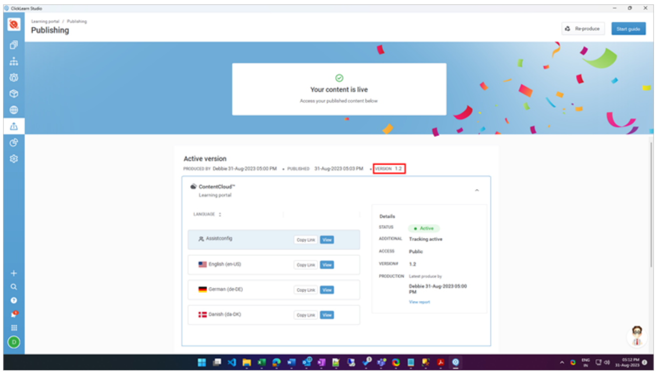
3.12.2. Procedure

3.12.2.1. Source project

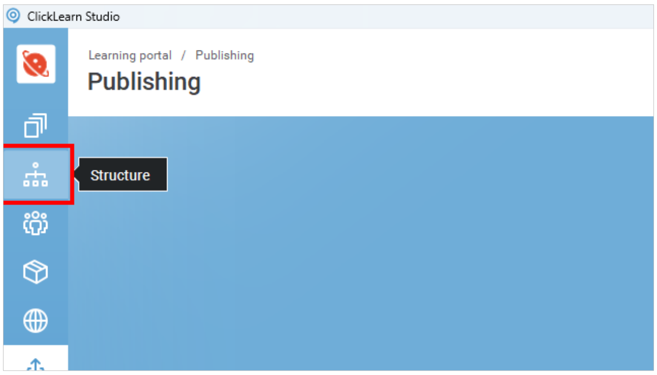
Click on the button **Publishing**.



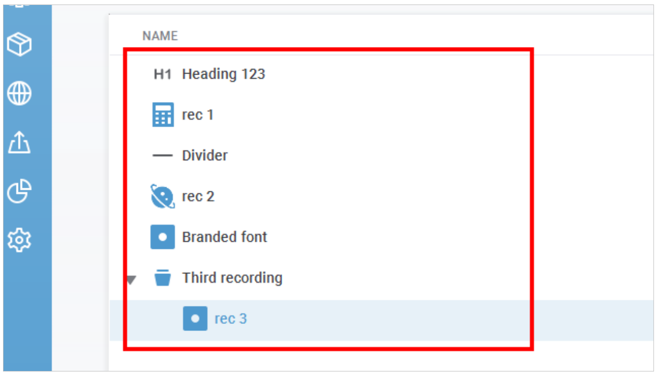
This project has been produced and published, and the active version is **1.2**.



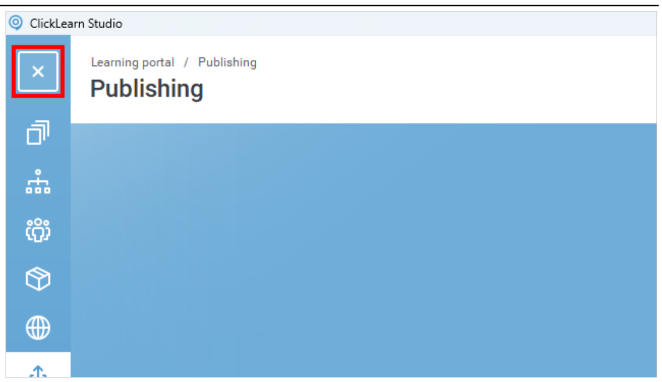
Click on the button **Structure.**



In the current structure, there are **4 recordings,** and the same had been published in version **1.2**.

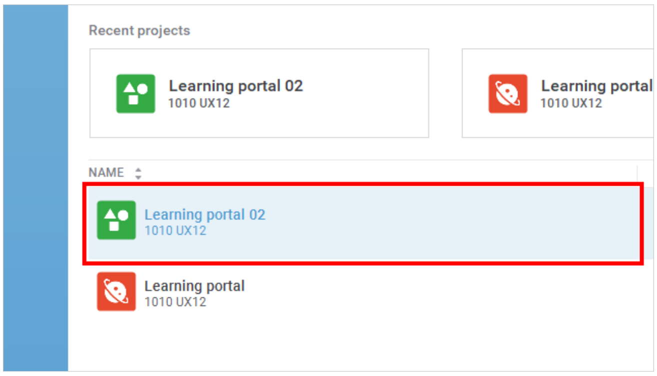


Click on the button **Close project.**

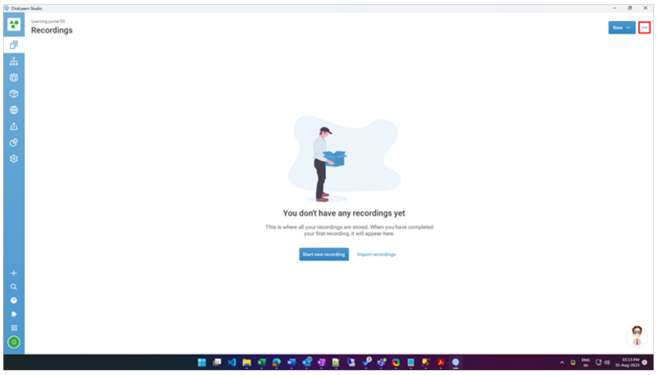


3.12.2.2. Destination project

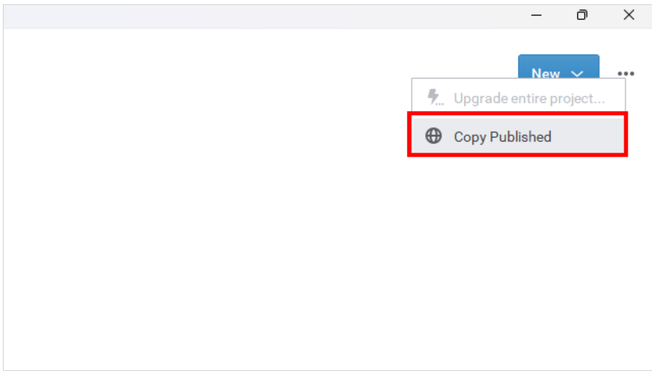
Open the project where you want to import the recordings published in the previous project's version 1.2.
Double-click on the grid cell **NAME** with the value **Learning portal 02.**



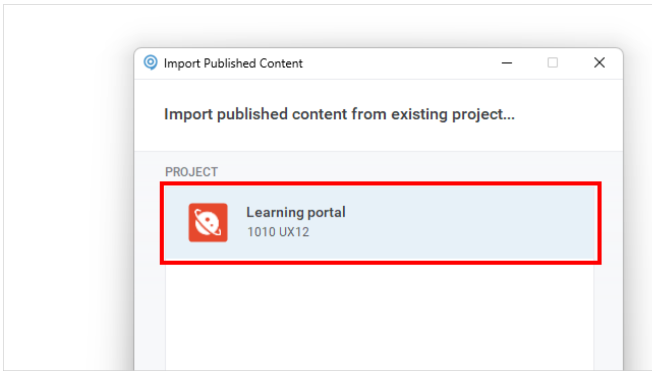
In the recordings screen, click on the button **More.**



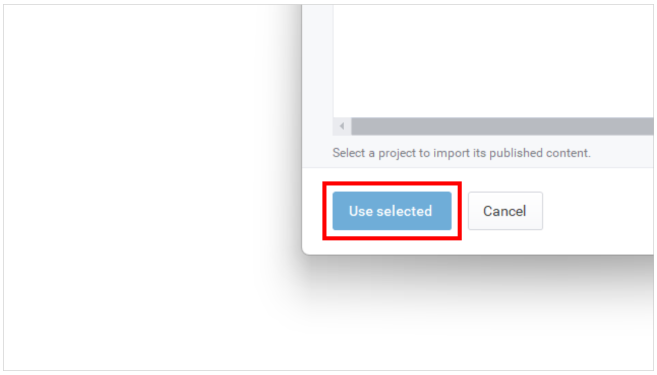
Click on the menu item **Copy Published.**



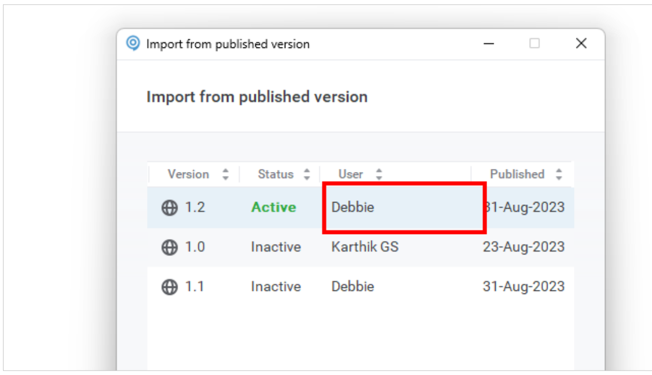
Select the source project.
Click on the item **Learning portal.**



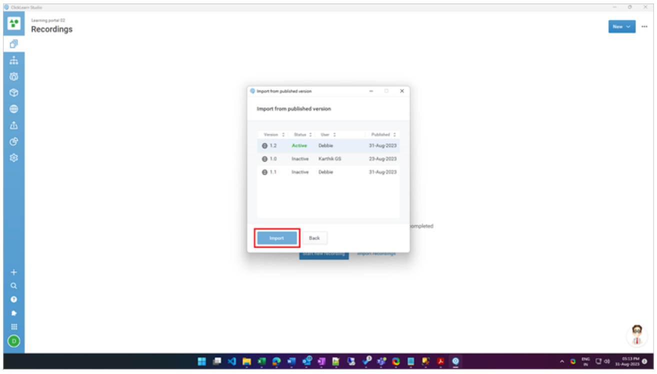
Select the version of the published version from which you wish to import.



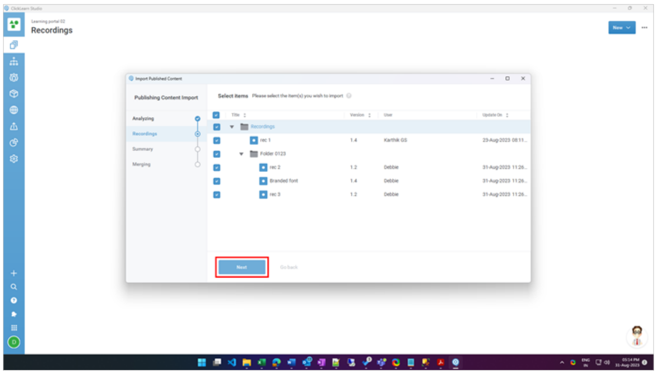
Click on the cell **User** with the value **Debbie.**



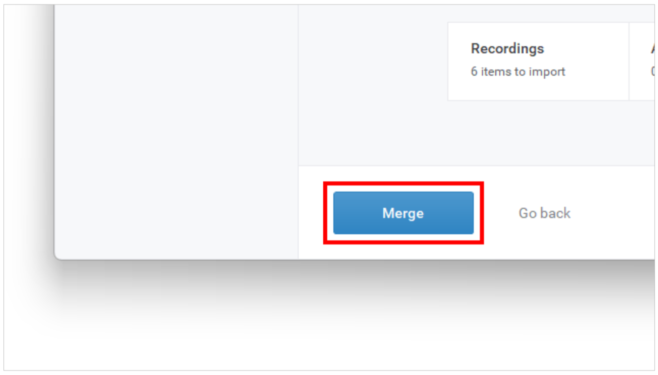
Click on the button **Import.**



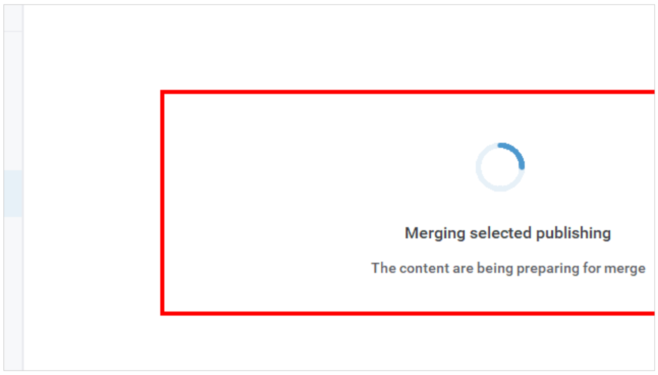
Click on the button **Next.**



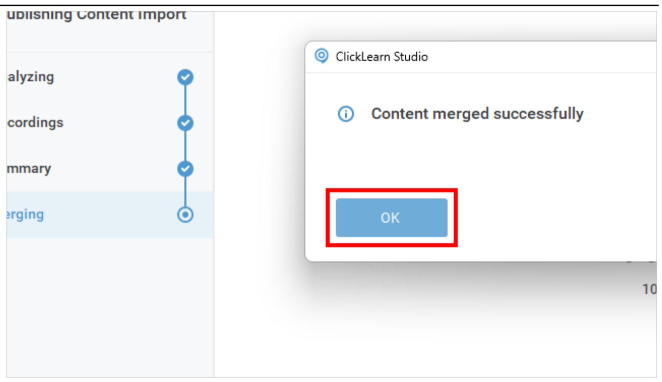
Click on the button **Merge.**



Click on the panel.

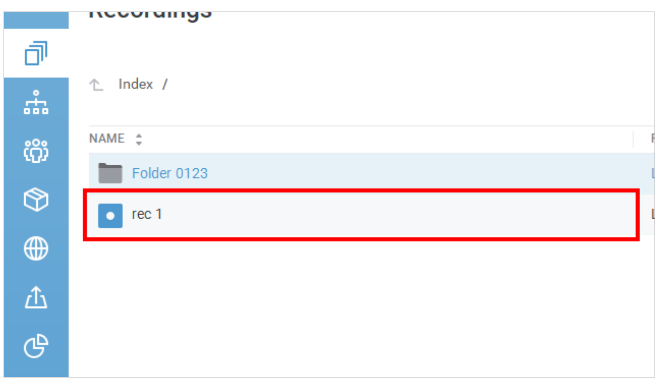


Click on the button **OK.**



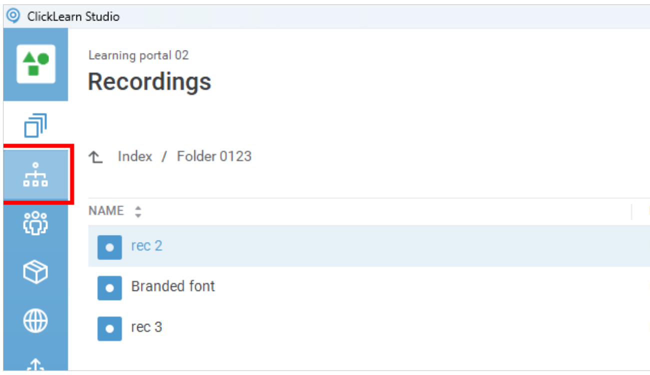
3.12.2.3. Result

Click on the grid view cell **NAME** with data **rec 1**.

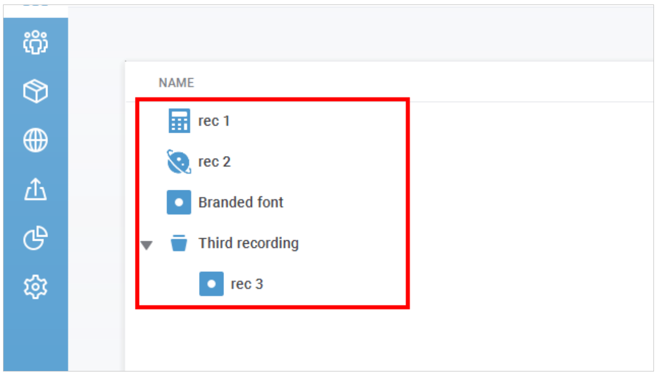


Double-click on the grid view cell **NAME** with data **Folder 0123**.

Click on the button **Structure**.



All the recordings are now imported and added to the structure, too.

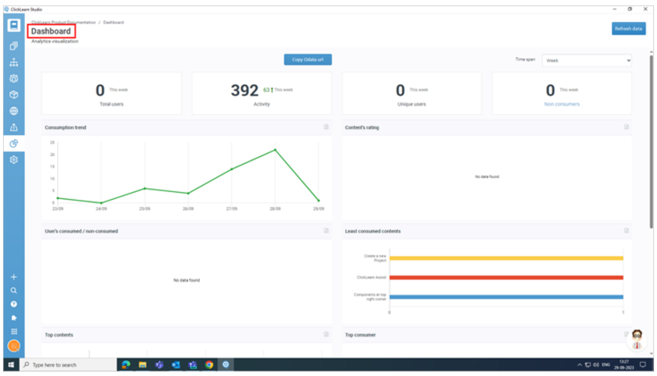


4. Dashboard

4.1. Overview of Dashboard

4.1.1. Introduction

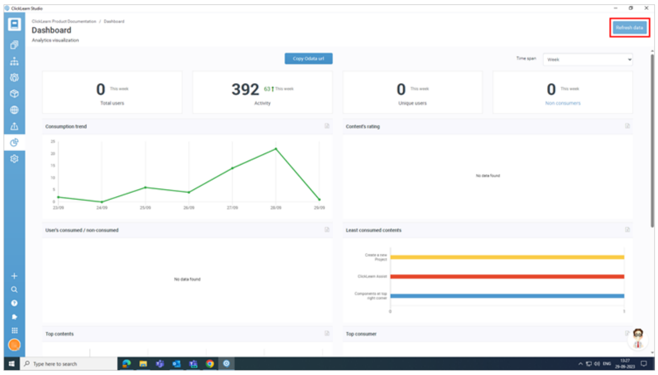
Dashboard is a feature that allows you to track and analyze the data collected from your published content. The dashboard helps you understand how users consume your content across time zones and locations and what works and doesn't.



4.1.1.1. Other Elements

4.1.1.1.1. Refresh Data

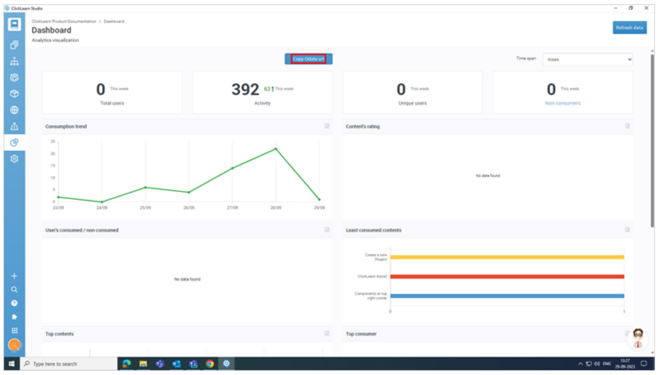
Refresh data: This will reload or update what is displayed or stored on a device.



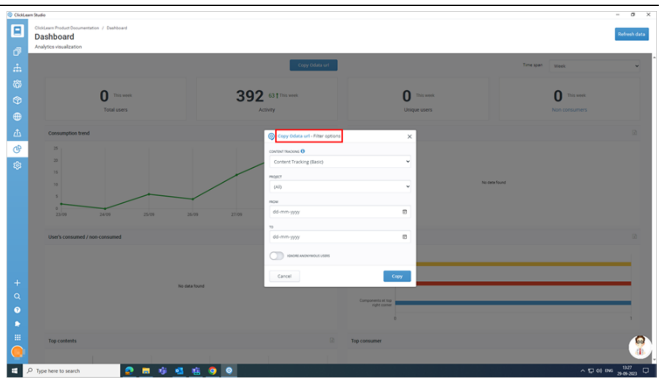
4.1.1.1.2. Copy Odata URL

One of the features of ClickLearn Attain is that you can create reports and dashboards in Microsoft Excel using the data from your published content.

Click on the **Copy Odata url** button.



A new window, "**Copy Odata url - filter options**." You can use these filters depending on your project needs and click "**Copy**."

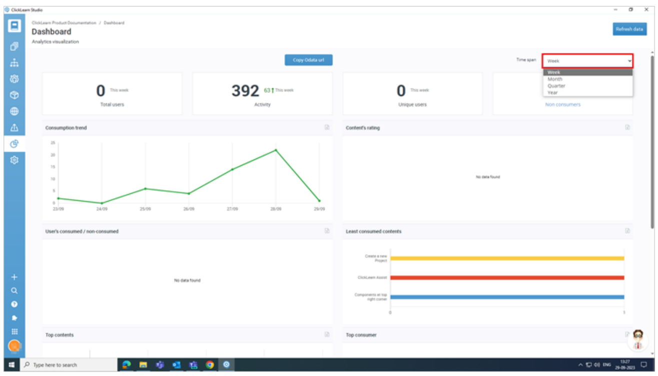


4.1.1.1.3. Time Span

This function offers you with four different options.

- Week
- Month
- Quarter
- Year

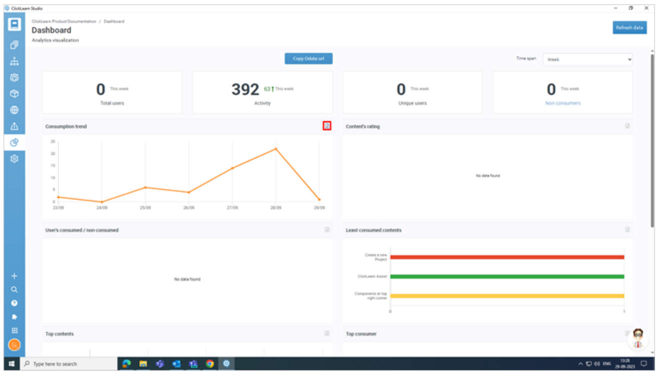
You can choose from these filters to get a weekly, monthly, quarterly, or yearly summary of total users, activity, unique users, and non-consumers.



This also displays the trend of consumption, the rating of content, the number of users who consumed or did not consume the content, the content with the lowest consumption, the content with the highest consumption, the user who consumed the most, and the ratio of consumed to non-consumed content.

4.1.1.1.4. Export Data

Export Data: This function can save data as an Excel file.



5. Localization

5.1. Overview of localization

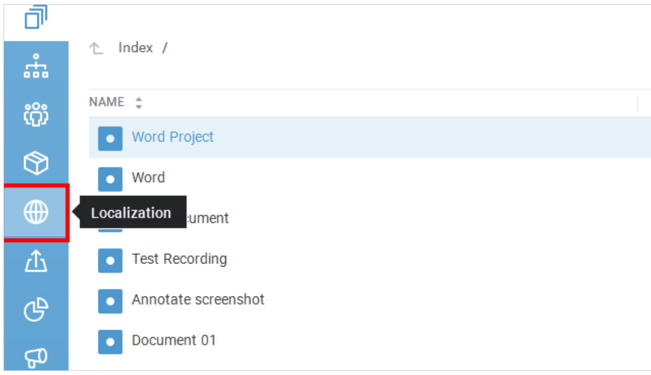
5.1.1. Introduction

Localization is adapting your content to different languages and cultures to reach a broader audience.

It can help you increase user adoption, satisfaction, and retention of your software products.

ClickLearn Attain is a powerful tool to help localize your learning materials. With the help of ClickLearn's localization feature, you can easily translate your projects into different languages based on your user requirements.

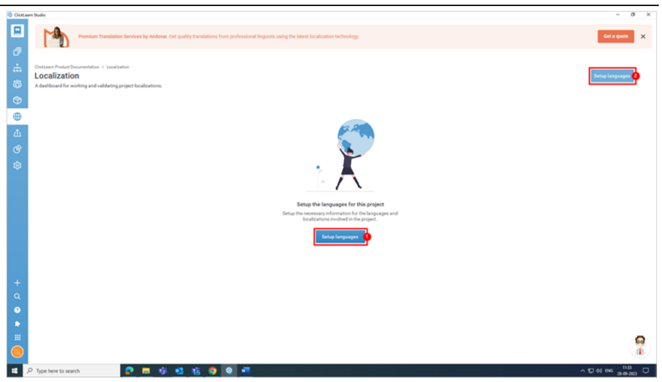
When creating a project, you need to select **at least two languages**. English is the primary language for your project; the other language depends on your preferences. In the localization screen, you can manage and verify your project localizations.



Click on the button **Localization**.

Setup languages

1. **Setup Languages:** If you have only one language in your project, there are two ways in which you can set up languages. Click on the button **Setup languages**.
2. Click on the button **Setup languages**. It will redirect you to **settings >> language settings**, where you can add languages to your project.

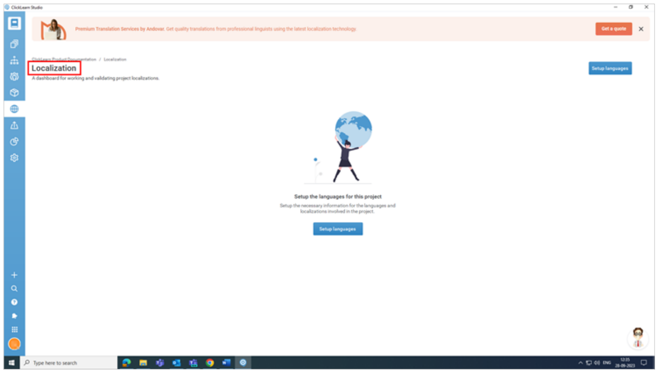


5.2. Localization Dashboard

5.2.1. Localization Dashboard

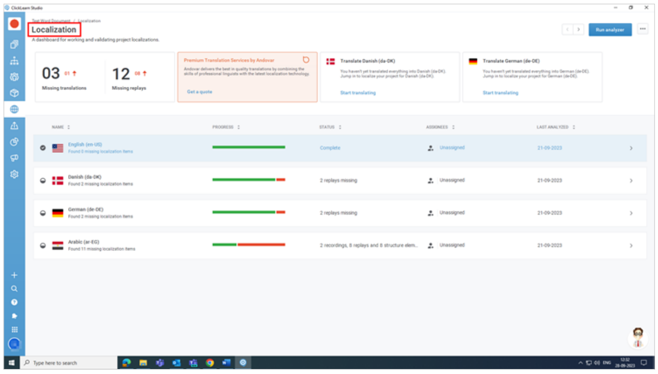
5.2.1.1. New User

New User: This is the **Localization** screen for a new user.



5.2.1.2. Existing User

Existing User: This is how the **Localization** screen looks for an existing user.

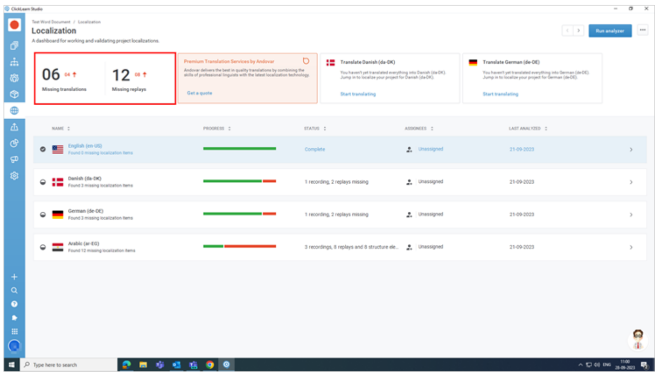


5.2.2. Dashboard Details

Click on the panel.

Missing translations: This shows the number of missing translations for that project.

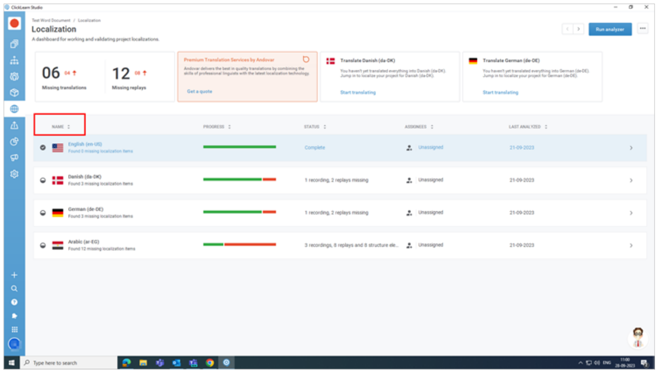
Missing replays: This shows the number of missing replays for that project.



5.2.3. Other Elements

5.2.3.1. Name

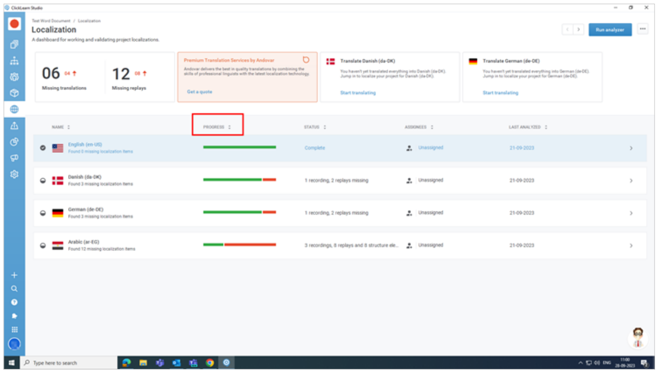
Name: The **NAME** and number of languages included in the project.



5.2.3.2. Progress

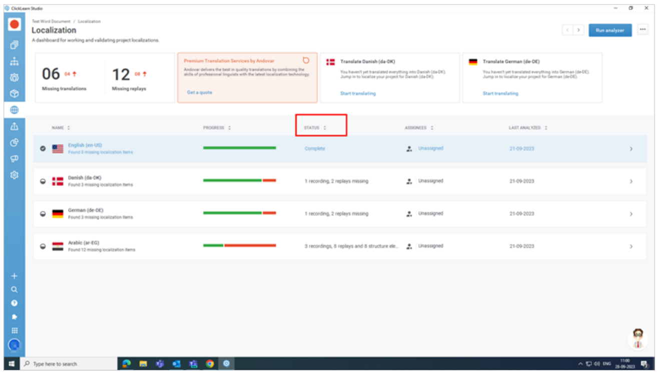
PROGRESS shows whether the localization is complete or incomplete.

The localization is complete when the line is **green**. The **red** line represents that some part of localization is missing.



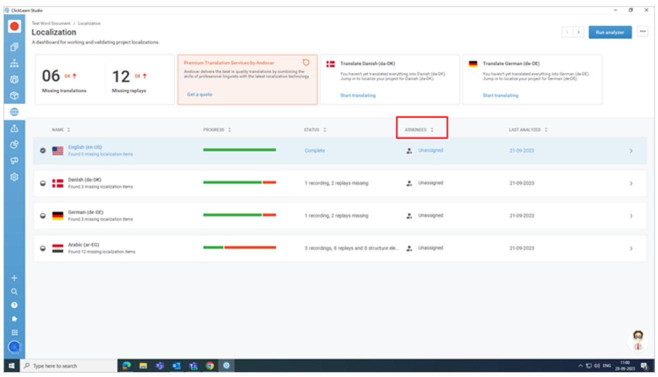
5.2.3.3. Status

Status: It indicates the **STATUS** of localization, whether complete or incomplete. If it is incomplete, it displays the missing components: a recording, replay, asset, etc.



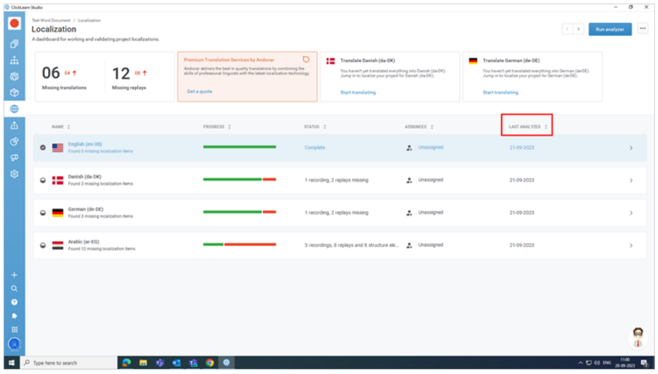
5.2.3.4. Assignees

ASSIGNEES display the name of the user to whom it is assigned.



5.2.3.5. Last Analyzed

LAST ANALYZED shows the date of the last modifications in the localization tab.

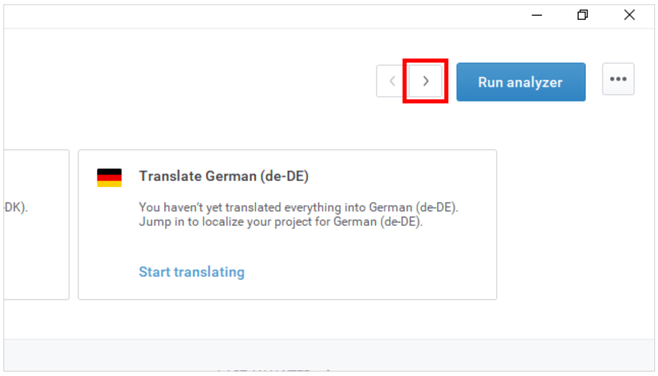


5.3. Top right corner of localization

5.3.1. Other Elements

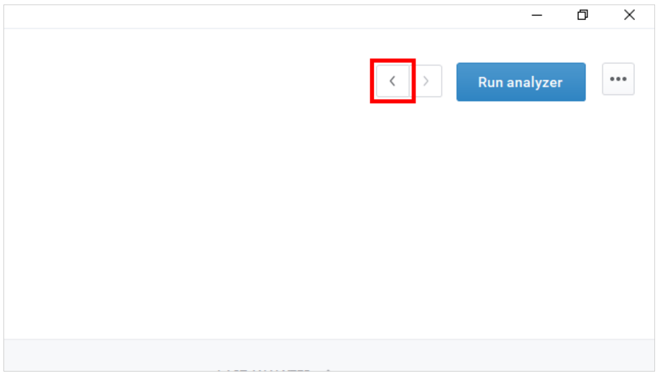
5.3.1.1. Right Arrow

Right Arrow: This navigation tool lets you scroll through the languages in your project. You can use it to see the languages on the right side.



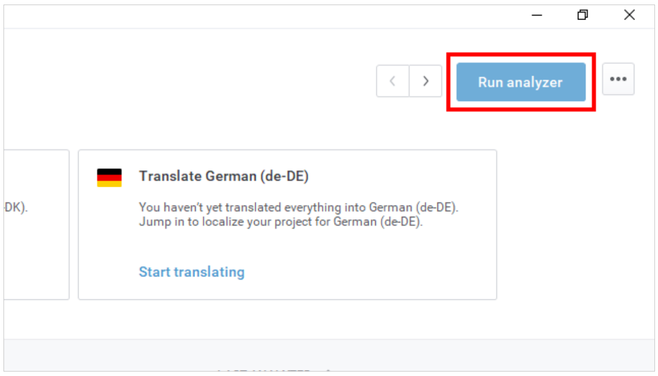
5.3.1.2. Left Arrow

Left Arrow: This is similar to the right arrow, but it shows you the languages on the left side.



5.3.1.3. Run Analyzer

Run analyzer: This will analyze your content and make it ready for you to start localizing.



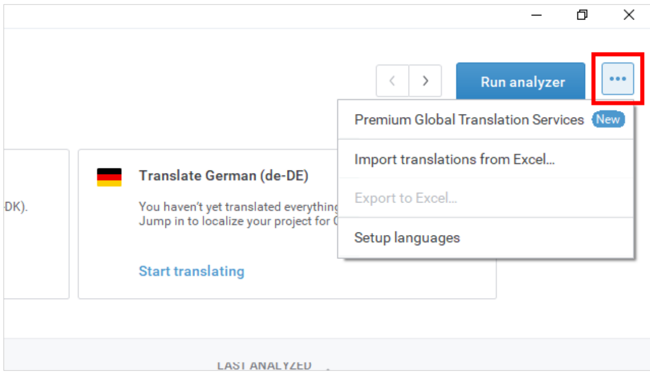
5.3.2. More Options

Click on **3 Dots For More Options On Localization** to view more options.

Import translations from Excel: If you have your translations in an Excel file, you can directly import them here with the help of this function.

Export to Excel: This function will help you to export your translations into an Excel file.

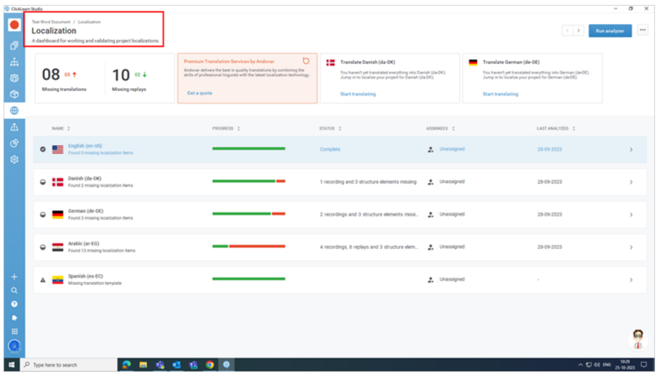
Setup languages: This option will redirect you to **Settings >> Language Settings**, where you can add languages to your project.



5.4. How to translate your project

5.4.1. Introduction

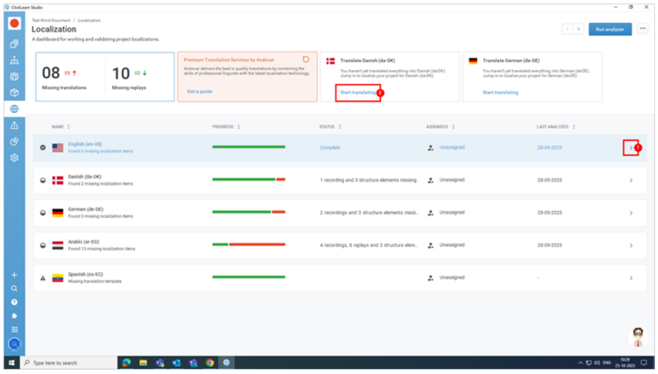
Localization: This is what a localization screen looks like. From here, you can localize your project in different languages.



5.4.1.1. Translating your project

Ways in which you can translate your project

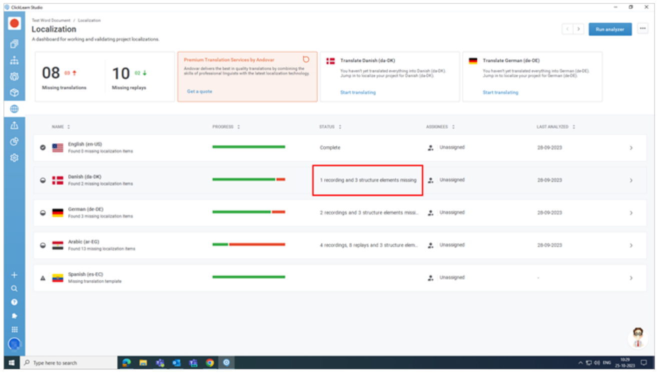
1. Click on the button **More Options** of grid cell **Action**.
2. Click on the button **Start translating**.



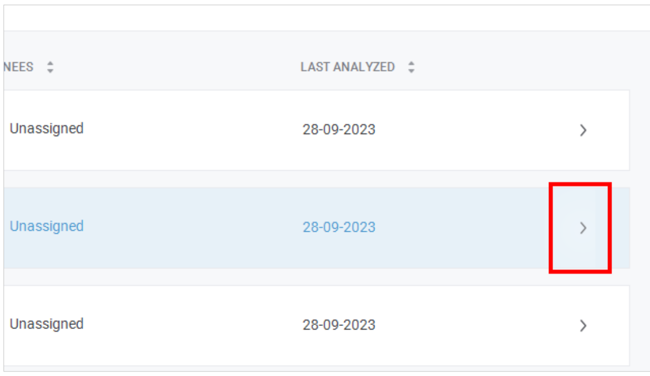
5.4.1.1.1. Steps to translate

Choose the language you want to translate your project into. The status bar will show you the missing elements for that particular language.

Click on the grid view cell **STATUS** with data **1 recording and 3 structure elements missing.**



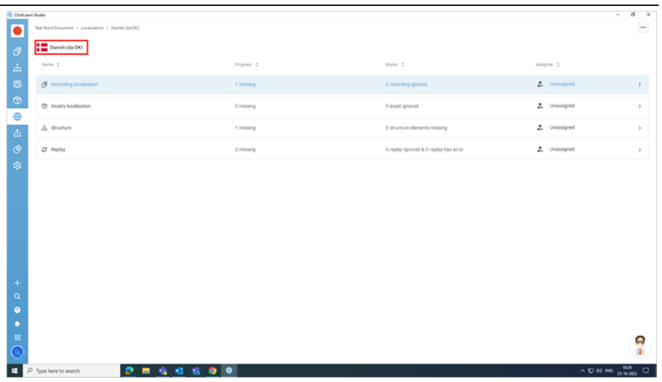
Click on the button **More Options** of grid cell **Action**.



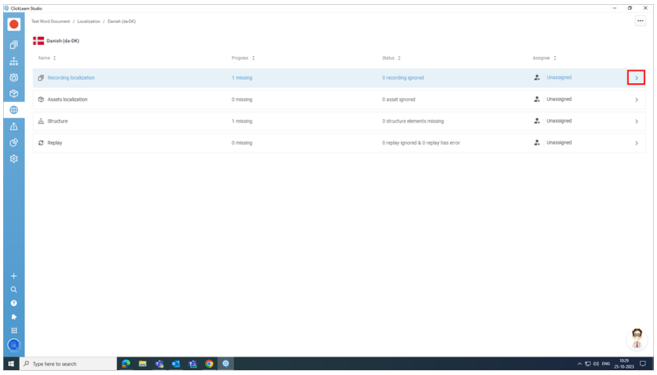
Here, we have selected the language **Danish (da-DK)**.

This screen displays the details about the missing elements. There are four elements associated with each language.

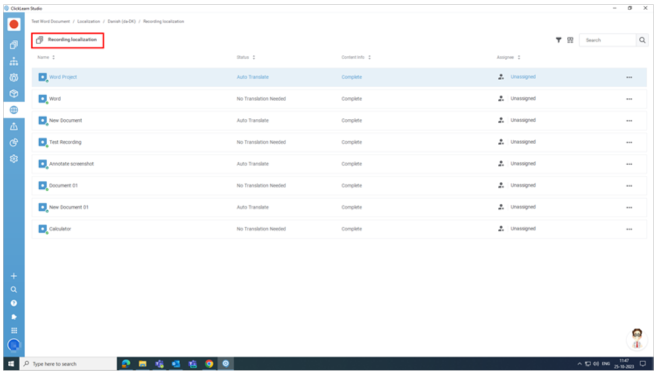
- **Recording Localization:** The recordings that need translation are listed here.
- **Assets Localization:** The assets that are missing translations are visible here.
- **Structure:** The structure elements that are missing are displayed here.
- **Replay:** This shows the list of recordings that require replay.



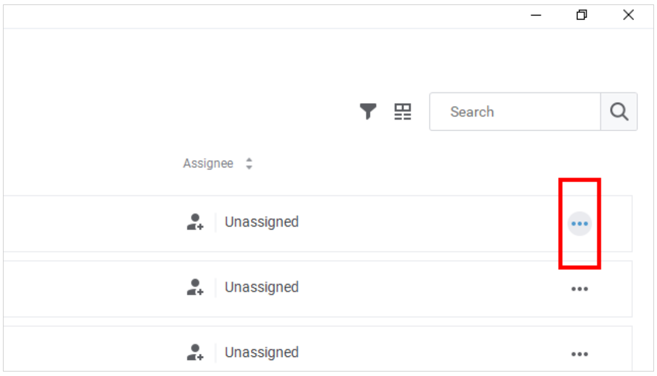
Click on the button **More Options** of the grid cell **Action**.



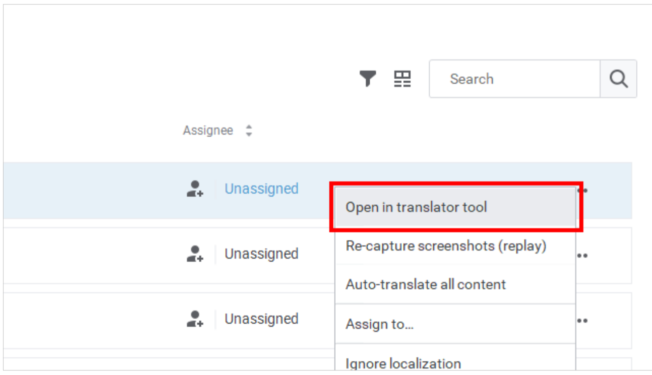
Recording localization: This displays the list of recordings. The content info shows **complete**, which implies no further translation is required for this element.



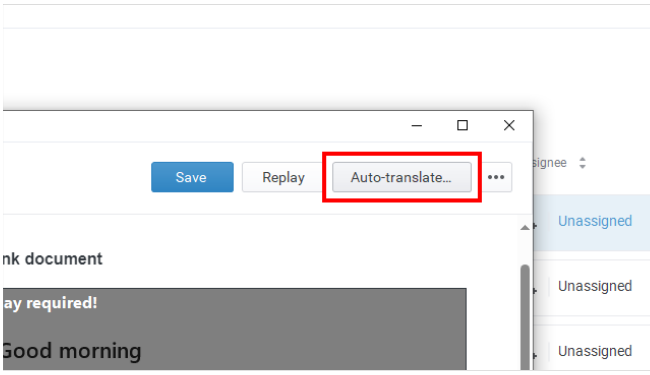
To translate your recordings, click **More Options** of grid cell **Action**.



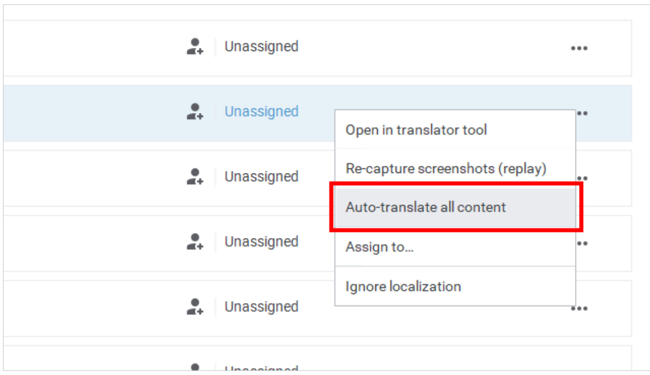
Click on the menu item **Open in translator tool**.



This opens up the recording you selected. Click on the **Auto-translate** button, and this will translate your recording to the language you selected.

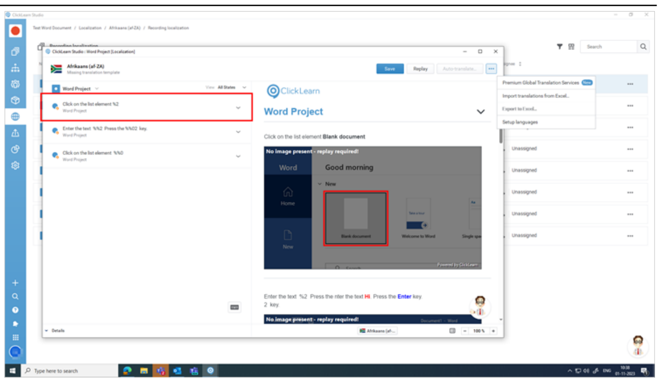


Another way in which you can auto-translate is to click on **Auto-translate all content**. This opens up a new dialog box that asks you to select the steps that must be translated. Select the steps you wish to translate and click on the Translate button. Your recordings will be auto-translated.



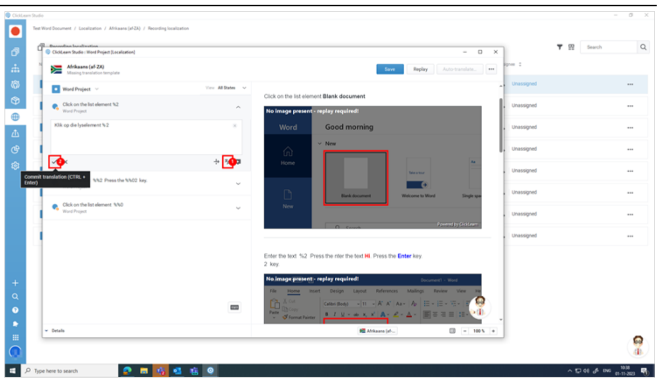
You can also translate single steps in your recording. Open the recording you wish to translate. Select the step.

Click on the panel: **Click on the list element Click on the list element %2**.

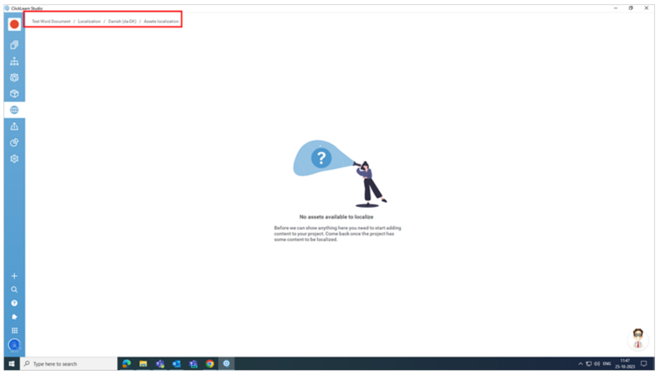


Auto-translate single step

1. Click on the **Autotranslate** button.
2. Click on the button: **Commit translation (ctrl + Enter)**.

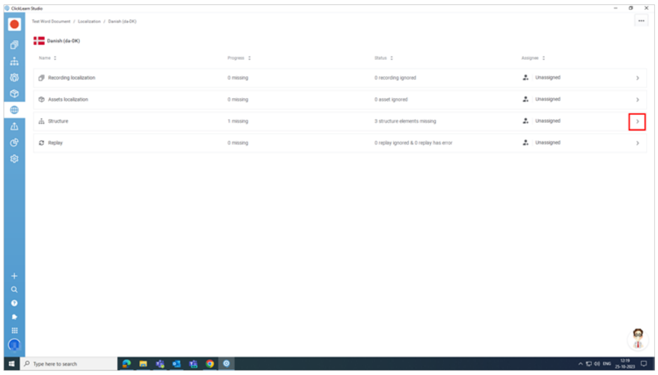


Assets Localization: You can localize the missing assets. If there are no missing assets, it displays a message no assets are available to localize.

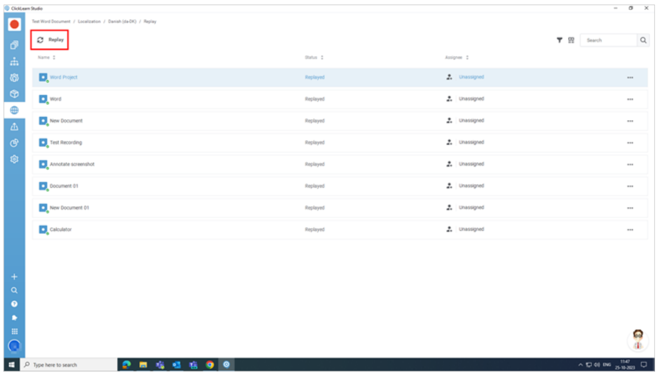


Structure: This opens up the recording, which has missing structure elements.

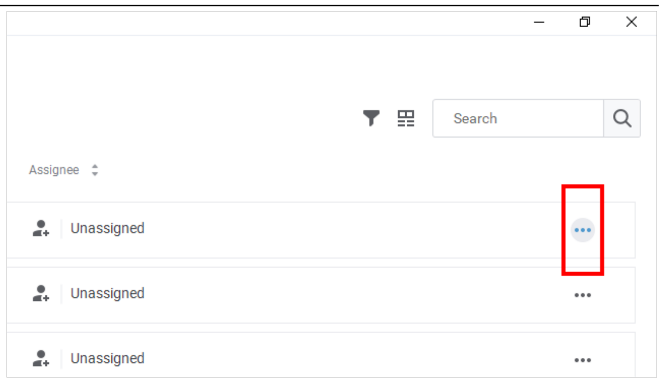
Click on the button **More Options** of grid cell **Action**.



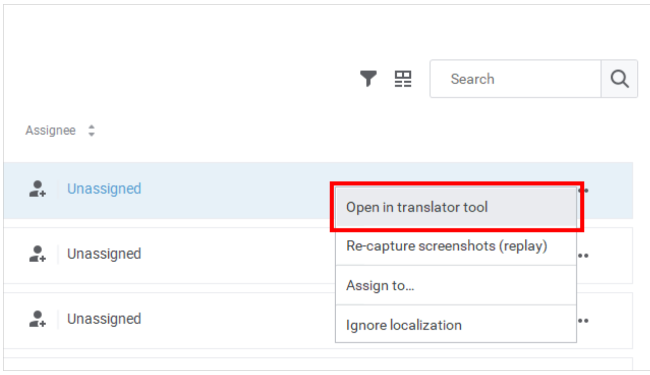
Replay: This displays the list of recordings that need to be replayed.



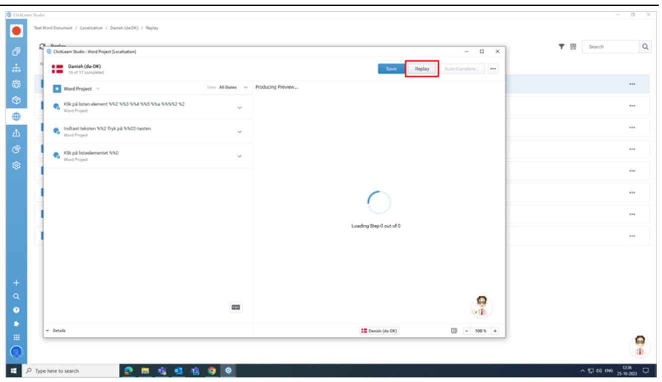
To replay a recording, click **More Options** of grid cell **Action**.



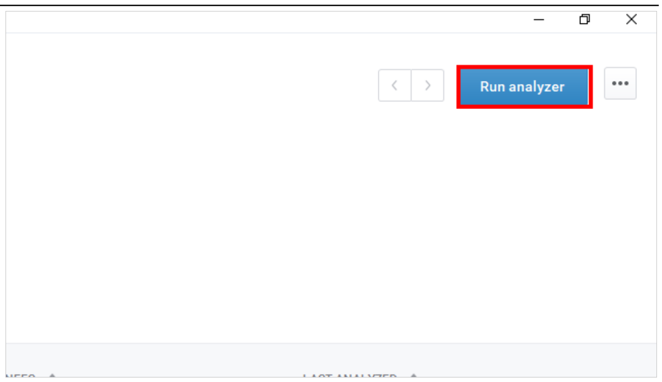
Click on the menu item **Open in translator tool**.



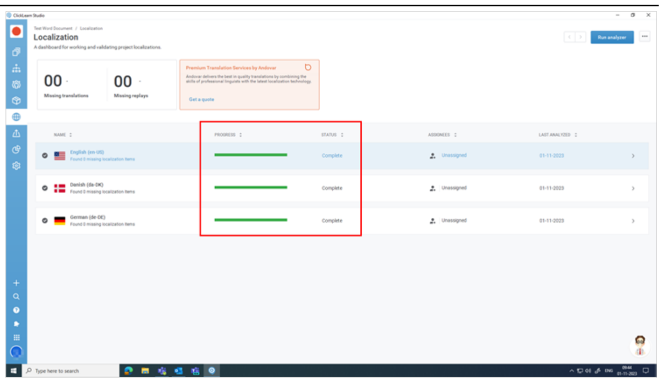
Click on the button **Replay**. It will start the replay for that particular recording.



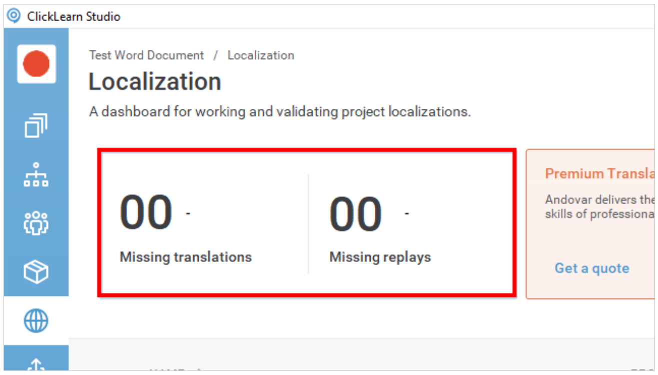
Once you localize every element, you need to run the analyzer. The **Run analyzer** button allows you to check the completeness of your localization. It works like a refresh button that updates your localization. Click on the run analyzer button.



The localization tab is refreshed, and as you can see, the status of all the languages is complete.



As there are zero missing translations or replays, the localization is complete.



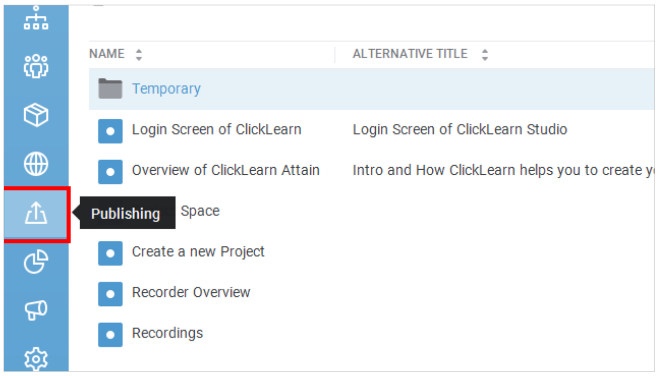
6. Publishing

6.1. Overview of Publishing

6.1.1. Introduction

With ClickLearn Attain, you can easily produce and share your learning content for different software platforms.

Click on the button **Publishing**.

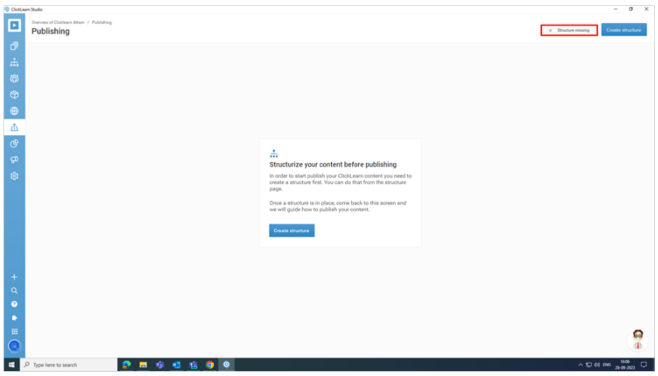


6.1.2. For New Users

6.1.2.1. Structure missing

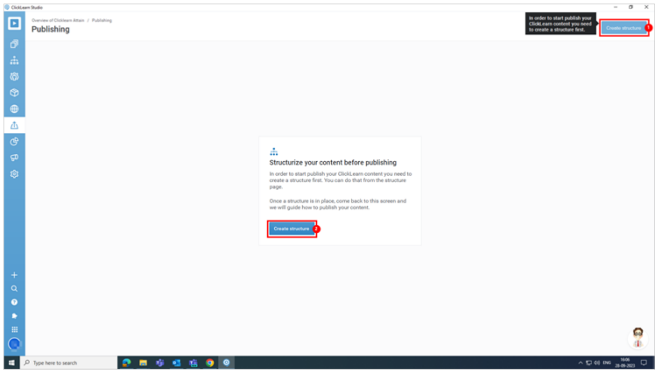
The screen of ClickLearn Attain looks something like this for **new** users.

Structure missing: Creating a structure is the primary step for new users who want to publish their content.



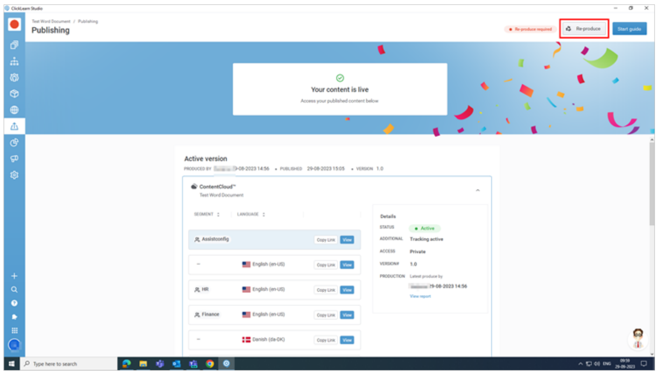
6.1.2.2. Create Structure

To Create Structure



1. **Create Structure:** To create a structure, you have two options. Click the **Create structure** button to redirect to the Structure and Segments screen.
2. The **Create structure** button will also redirect you to structure and segments. You can refer to the recording of **Structure and Segments** for a detailed step-by-step guide to creating a structure.

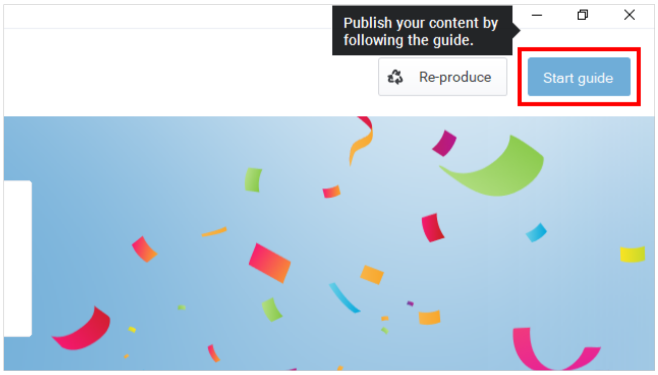
6.1.3. For Existing Users



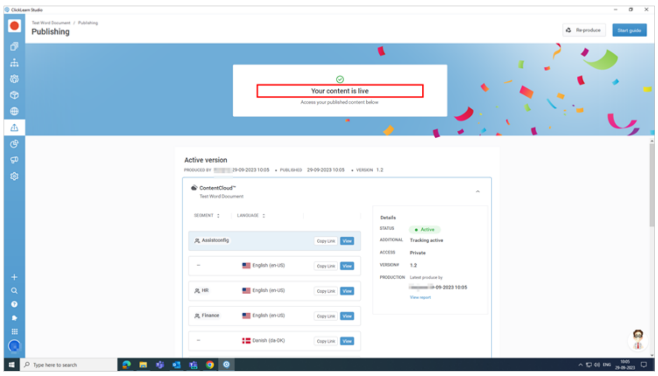
The screen looks like this if you are an **existing** user in ClickLearn Attain.

Re-produce: This will re-produce content with existing deployment options, languages, and tracking settings, or you can modify it as per your need before producing.

Start guide: This guide will help you produce and publish your content.



6.1.4. Details of Active Version



These are the details you can find under the **Active version**.

Produced by: This shows the user's name, who produced the project, and the date and time of production.

Published: This reflects the date and time of the project posted.

Version: The version of the published content.

Different Segments/Languages: Here, you can view the segments and languages in your projects if you have any.

Copy Link: This function allows you to copy the link, which you can share with your end users.

View: This will redirect you to your published content.

Status: The status of the project is active/inactive.

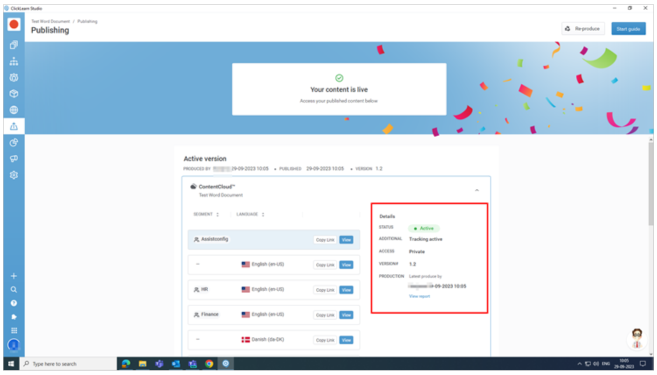
Additional: This displays the tracking is active.

Access: Access to your content is public or private.

Version: The version of the project.

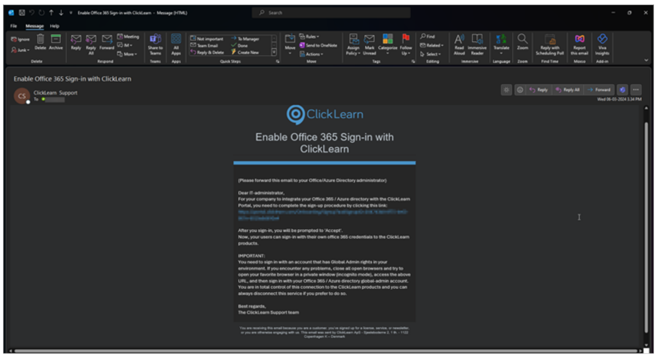
Production: This will show the name of the user by whom the latest produce is made, along with the date and time.

View report: This allows you to view the information; that is, it displays if there are any errors.

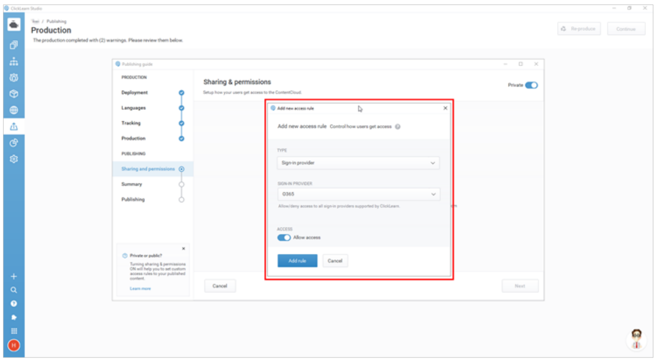


6.2. O365 SSO for end users

To enable O365 SSO, you should contact ClickLearn support to receive a mail with the link. Forward the mail to your Azure AD administrator to grant access.



After receiving confirmation from the Azure AD administrator, please ensure that the content is produced and published with SSO for O365 added to it.



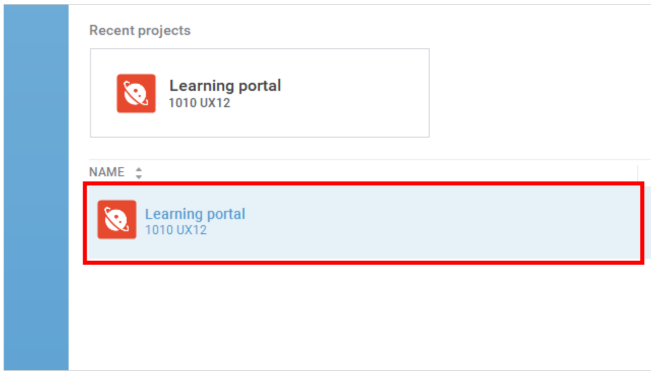
6.3. Use brand font on entire learning portal

6.3.1. Introduction

To use your preferred font throughout the entire learning portal, please follow the procedure outlined below.

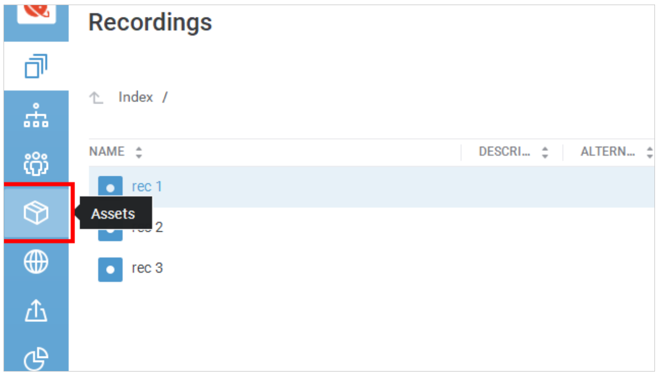
6.3.2. Procedure

Open the project for which you wish to apply your brand font.

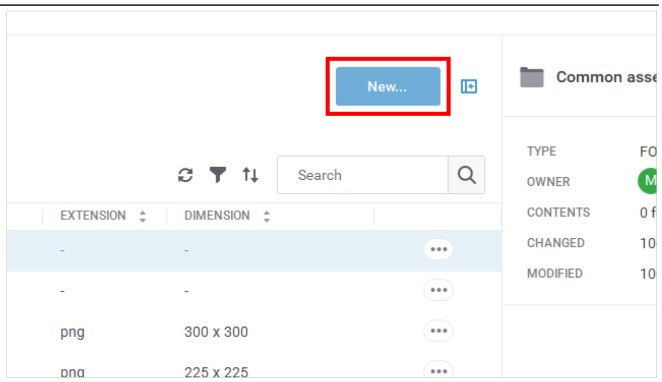


6.3.2.1. Create a folder by name 'redist' in assets to add font file there

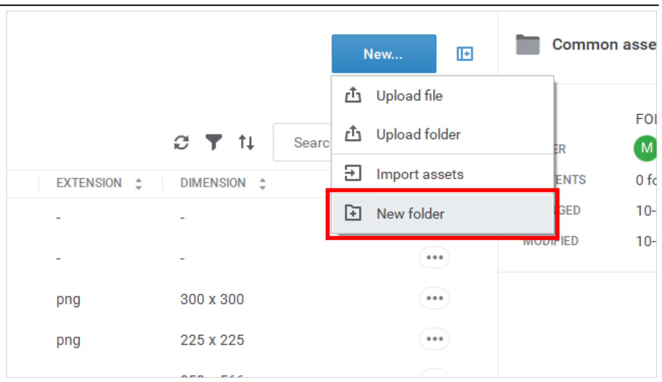
Click on the button **Assets**



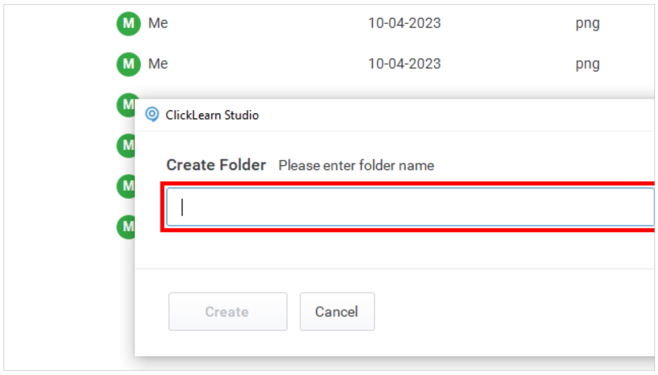
Click on the button **New...**



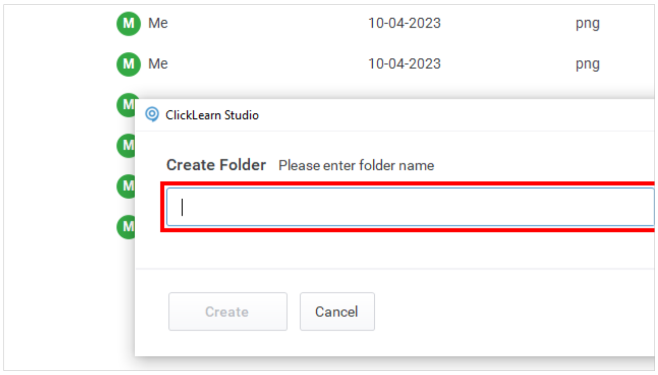
Click on the menu item **New folder**



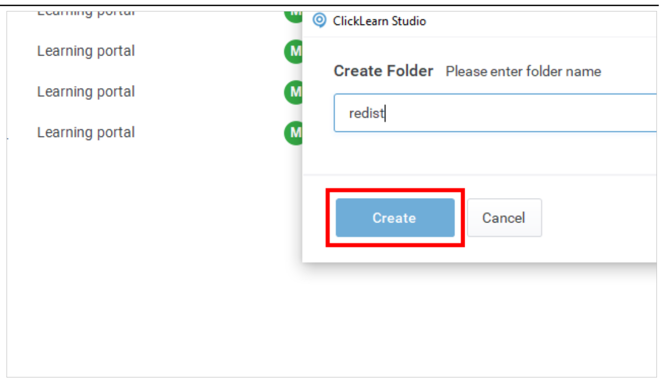
Click on the textbox **Name**



Enter **Name**.

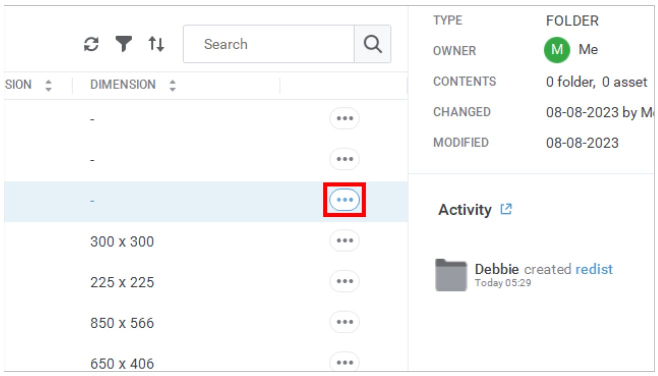


Click on the button **Create**

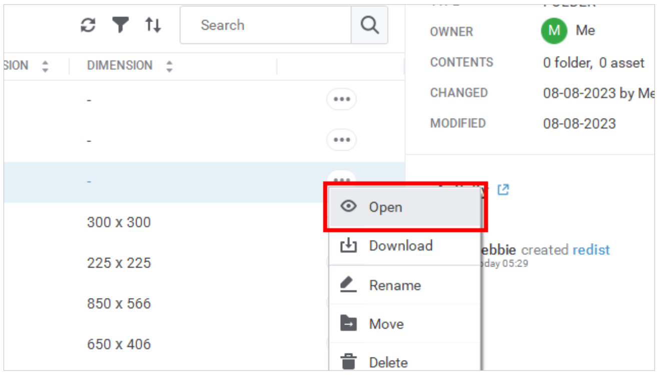


6.3.2.1.1. Add font file in redist folder

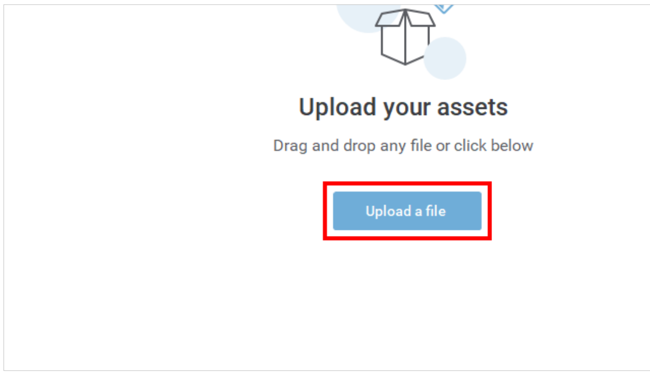
Click on the button **More** of grid cell **Action**



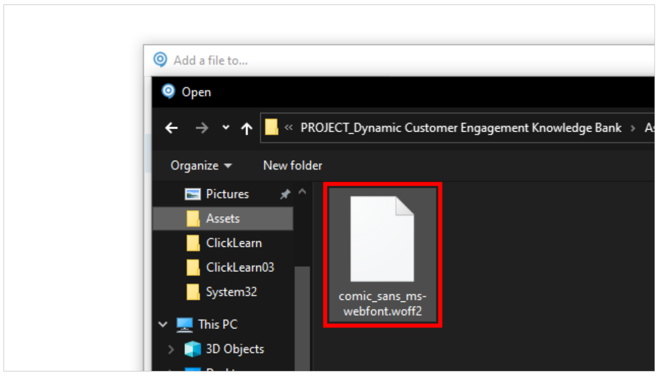
Click on the menu item **Open**



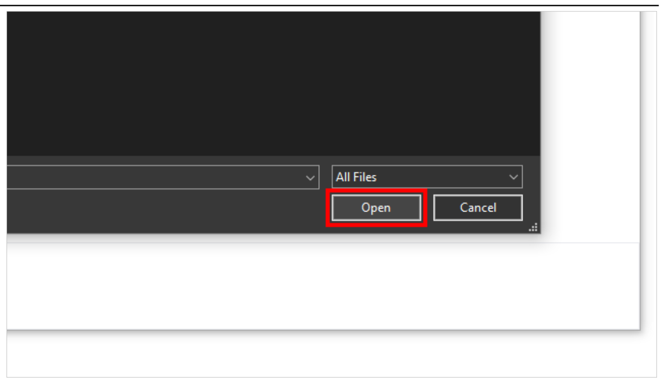
Click on the button **Upload a file**



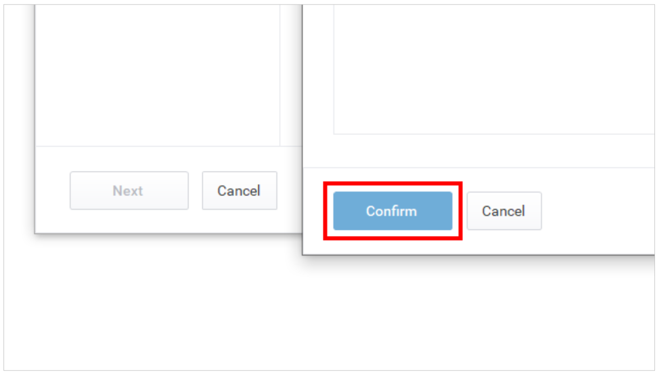
Click on the list element **comic_sans_ms-webfont.woff2**.
In your case it would be your brand font.



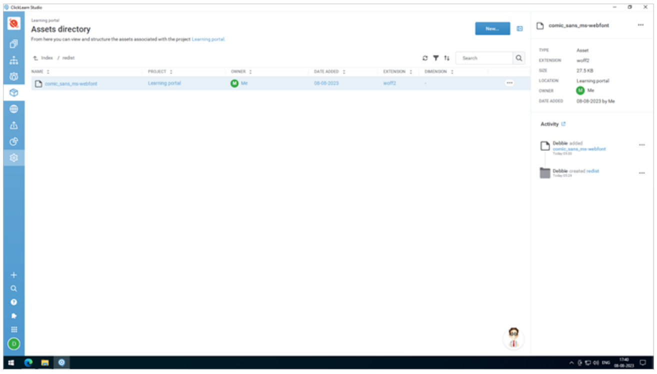
Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **Confirm**



Redist folder should look like this



6.3.2.2. Custom CSS

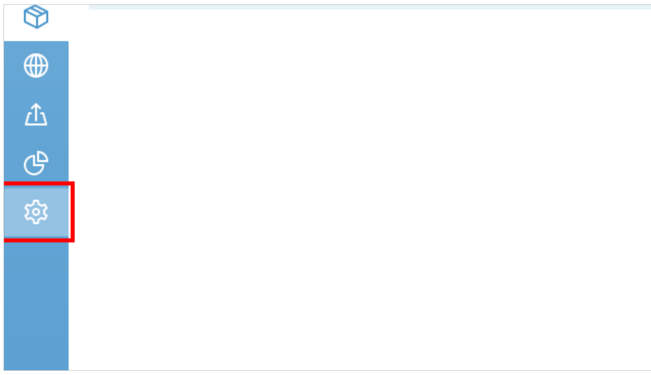
6.3.2.2.1. Format css

Below is the css code that you need to add. But before that, you need to paste this in a notepad and edit the font name ie replace the highlighted text to the font that you have added in the redist folder and update the format too.

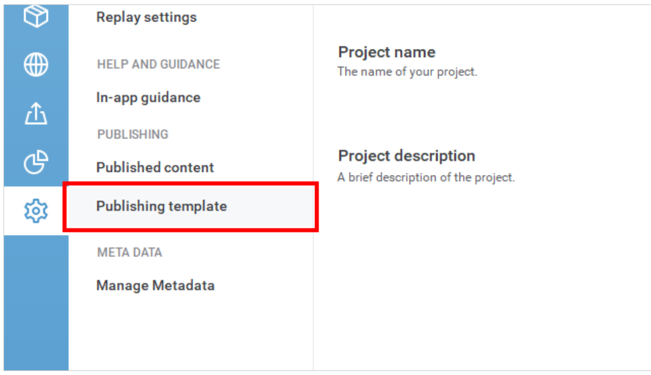
```
@font-face {  font-family: 'MyWebFont';  src: url('comic_sans_ms-webfont.woff2') format('woff2');}
body,
button,
input,
optgroup,
select,
textarea,
.cljsvNoteText,
.cljsvIntroTitleText,
.cljsvIntroDescText,
.cljsvChapterText
{
   font-family:MyWebFont,sans-serif;
}
```

6.3.2.2.2. Add custom css

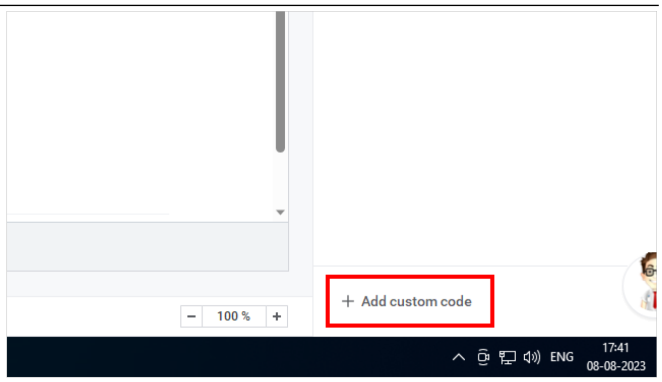
Click on the button **Settings**



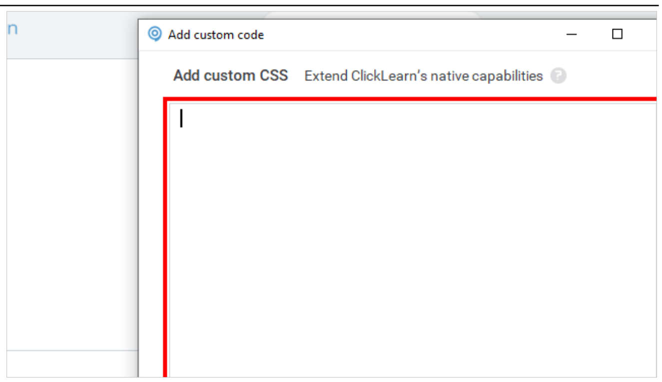
Click on the button **Publishing template**



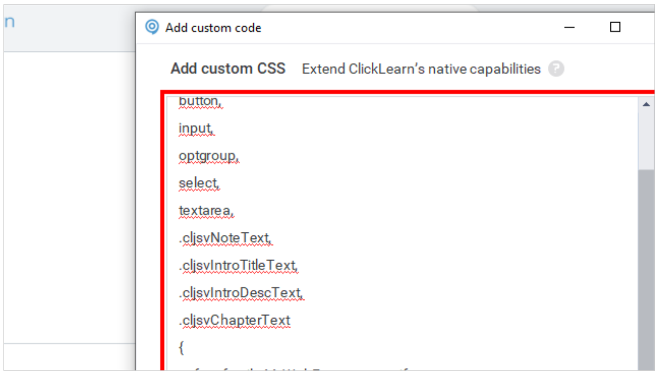
Click on the button **Add custom code**



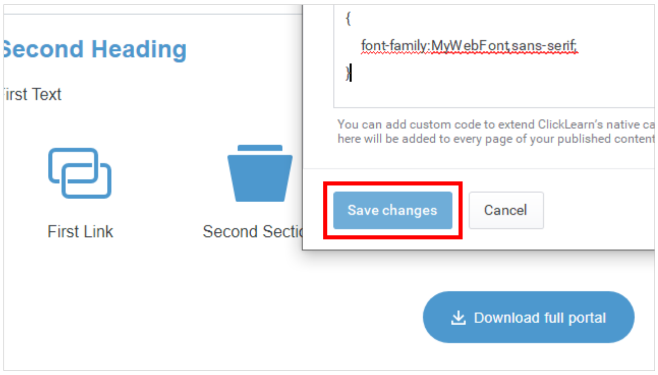
Click on the text editor



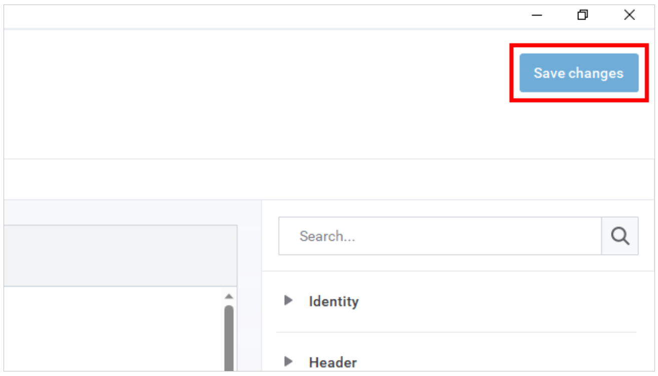
Enter the attached css code.



Click on the button **Save changes**



Click on the button **Save changes**



6.3.3. PS

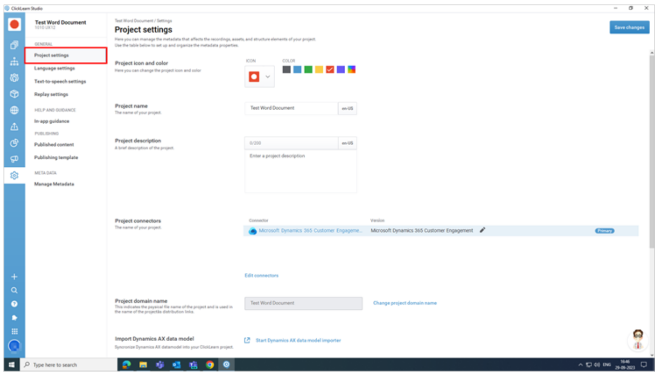
Produce and publish your content to see the changes.

7. Settings

7.1. Overview of Project Settings

7.1.1. Introduction

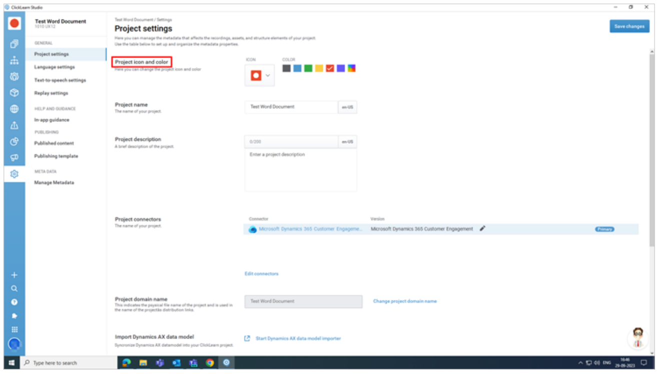
You can configure different aspects of your project through **Project settings**. Project setting will enable you to modify multiple project options and preferences.



7.1.1.1. Project icon and color

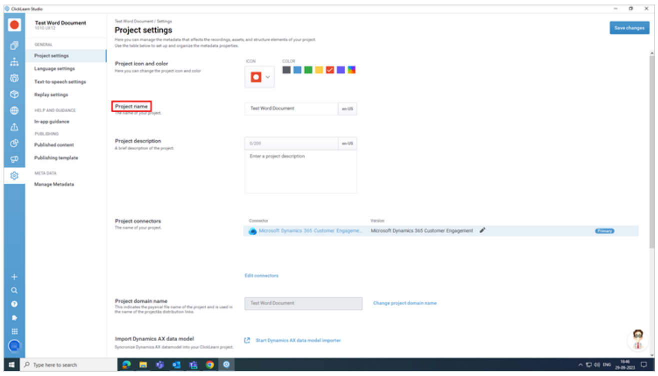
Project icon and color: You can choose the project icon from the available list of options.

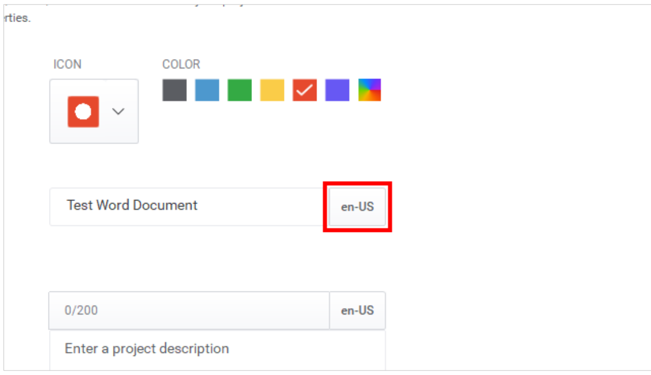
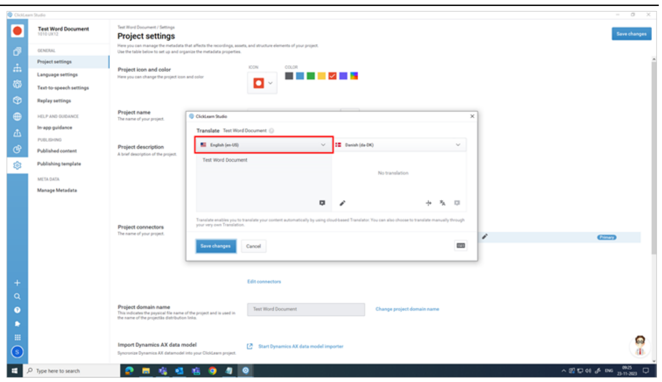
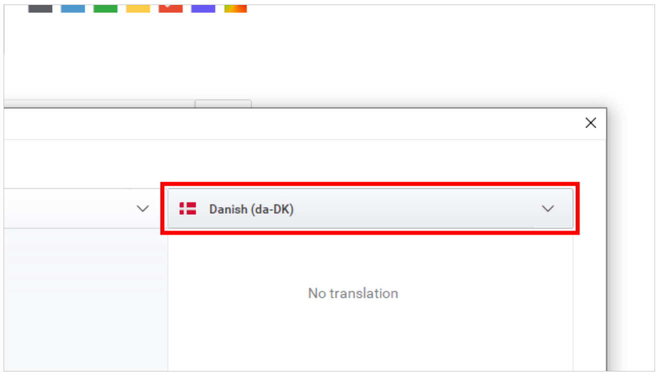
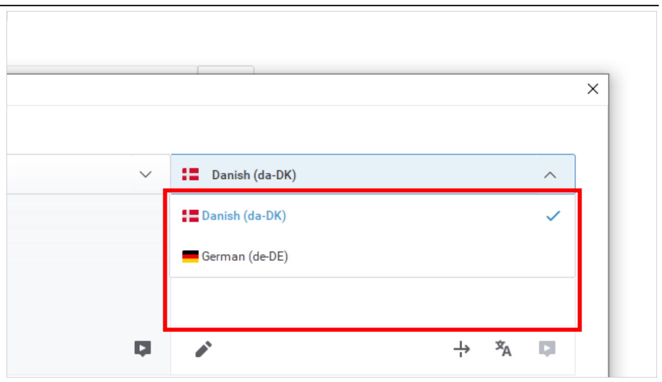
You can choose and customize colors for the project icon from the available color options.



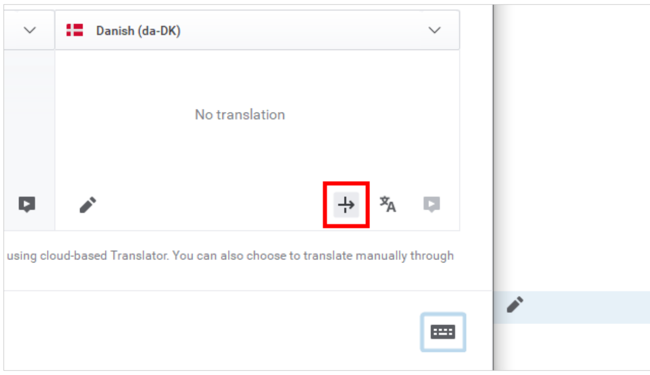
7.1.1.2. Project Name

Project name: This reflects the name of your project.

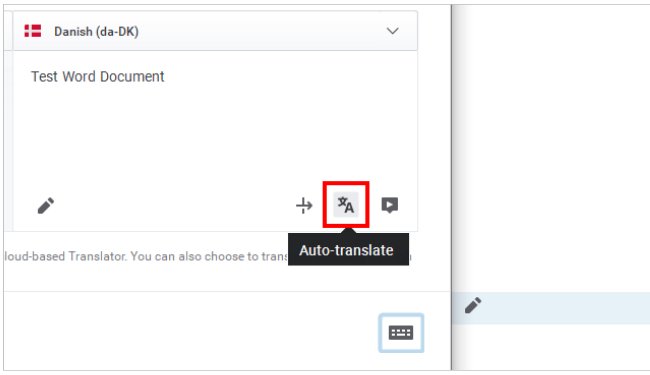


en-US: The en-US button allows you to translate the project name if you have one or more Languages included in the project. Click on the button **en-US**.	
You can select the Language to change the project name in a new dialog box that pops up. Click on the dropdown **Language Left**.	
Click on the dropdown **Language Right.**	
Select the **Language** from the dropdown.	

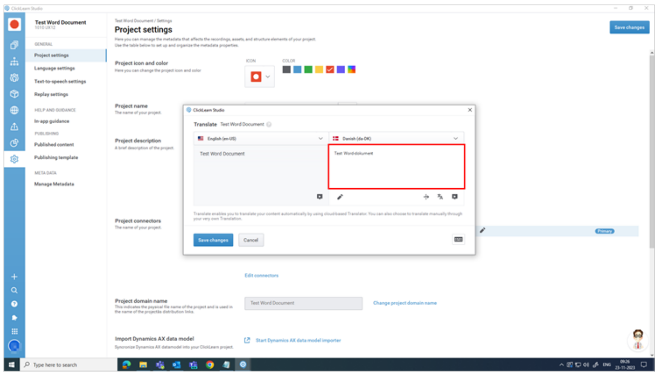
This icon uses the **same text as the source**.



Click on the icon **Autotranslate**.

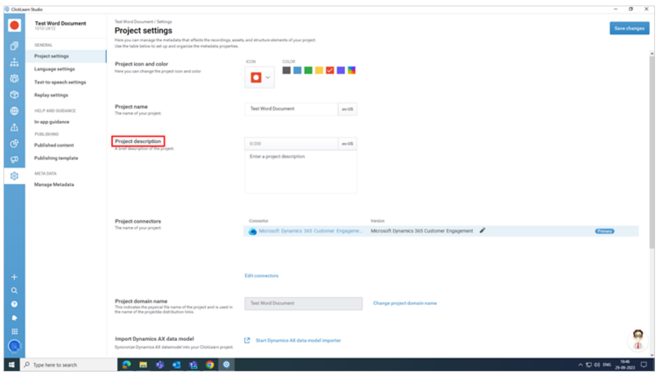


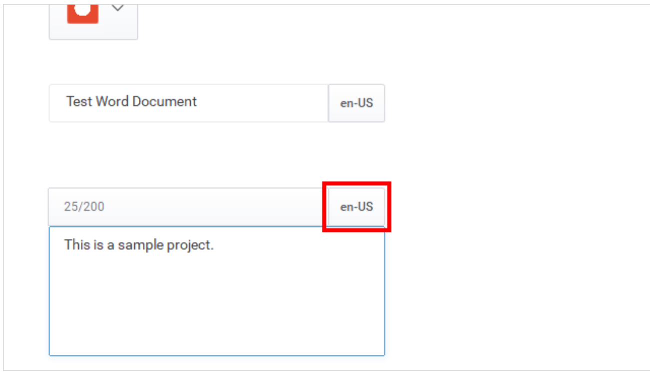
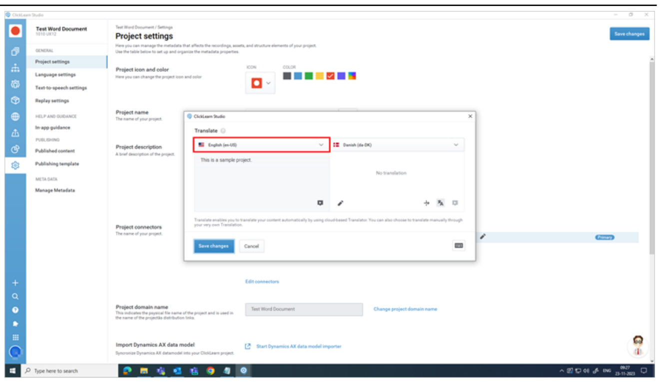
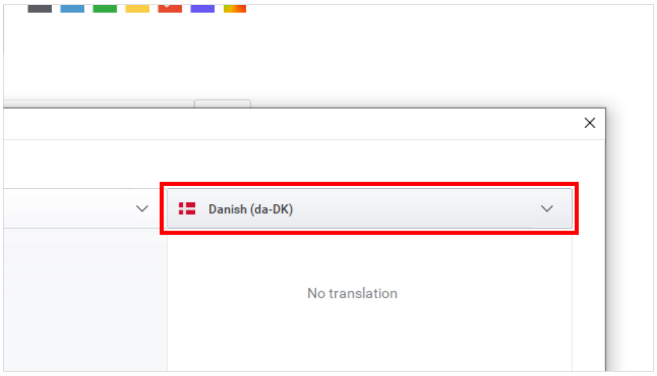
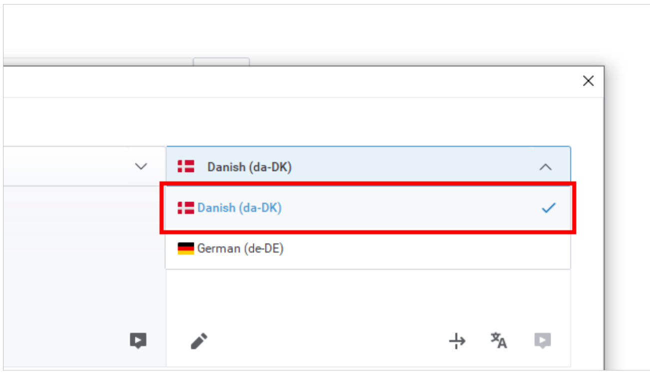
The project name is translated into Danish.



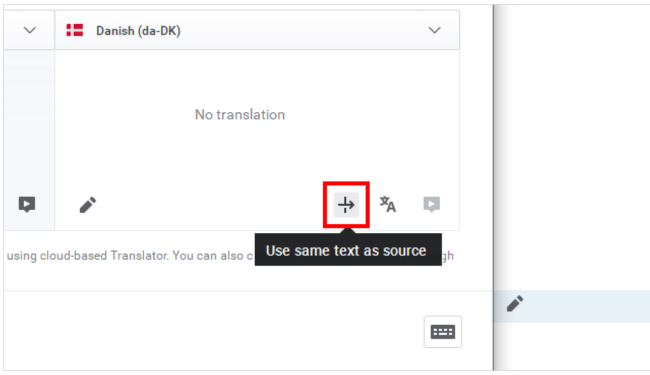
7.1.1.3. Project Description

Project description: You can provide the summary for your project based on your project needs. The limitation of the project description is 200 words.

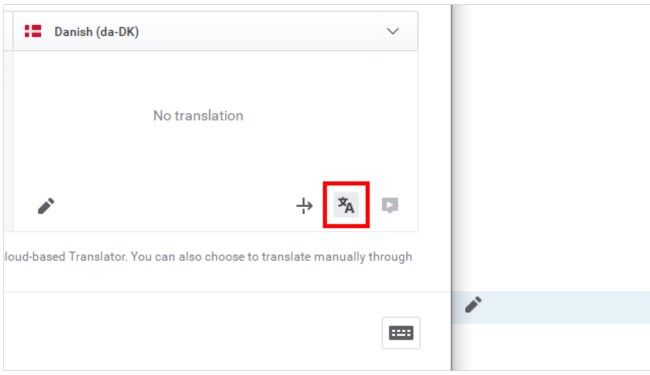


en-US: The en-US button allows you to translate the project description if you have one or more Languages included in the project. Click on the button **en-US**.	
You can select the Language to change the project description in a new dialog box that pops up. Click on the dropdown **Language Left**.	
Click on the dropdown **Language Right.**	
Select the Language from the dropdown. Click on the dropdown item **Danish (da-DK)**.	

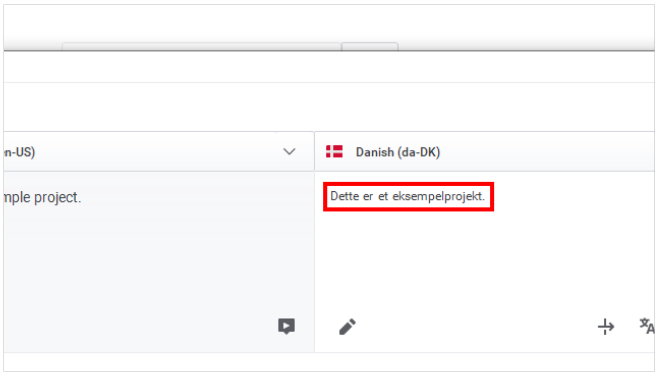
Click on the icon: **Use same text as source.**



Click on the icon **Autotranslate**.



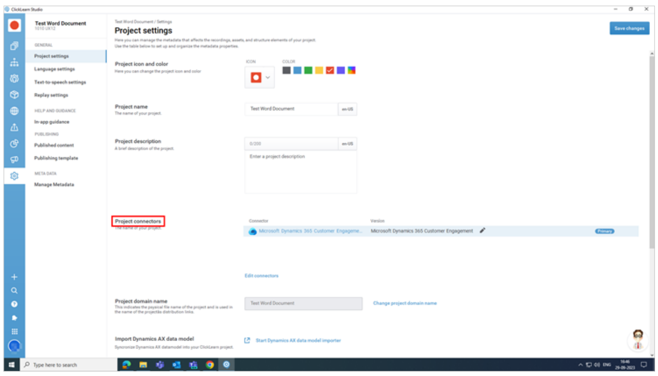
The project description is translated into Danish.



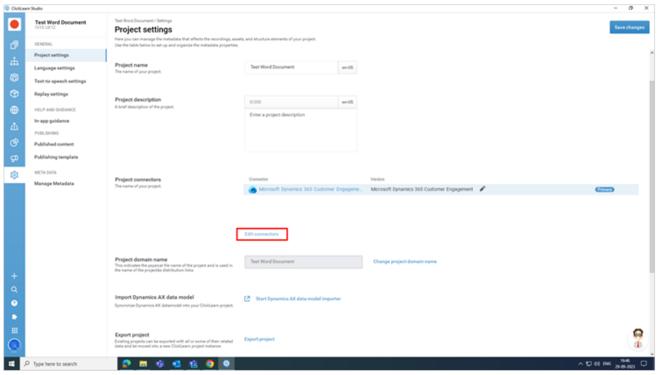
7.1.1.4. Project Connectors

Project connectors: Here, you will get a brief about the connectors you are using in your project. It will also display the connector name, version, and which connector you use as the primary connector.

You can also change the connector version according to your requirements.



Edit connectors: You have the option to edit connectors as well.

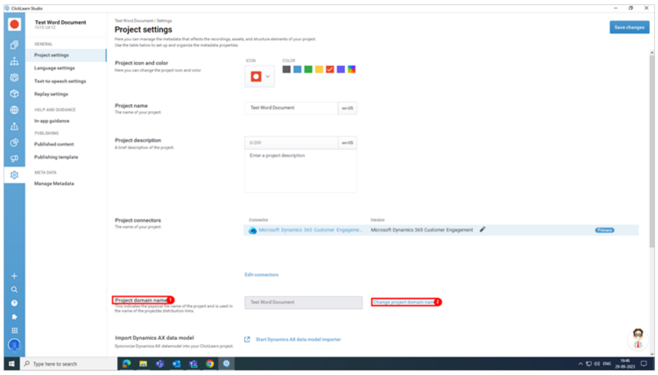


7.1.1.5. Project Domain Name

Project Domain Name

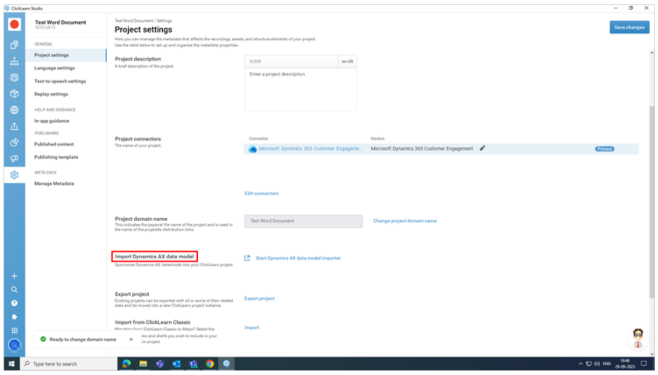
1. **Project domain name:** The project's file name and name used in its distribution link.
2. **Change project domain name:** You can change your project name.

   Note: Changing the domain name requires the project to be closed and re-opened. It also requires republishing your content if you have already published any content.

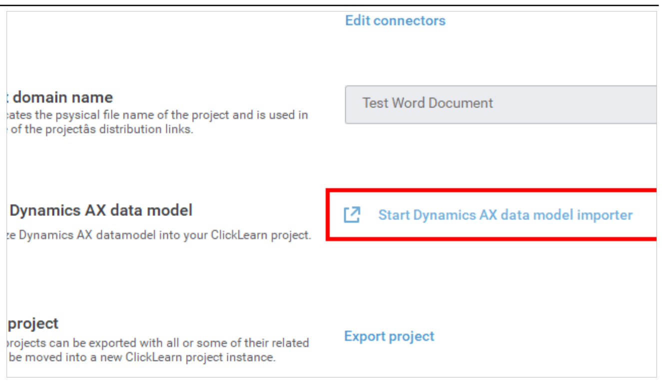


7.1.1.6. Import Dynamics AX data model

Import Dynamics AX data model: It will synchronize the Dynamics AX Data Model into your ClickLearn project.

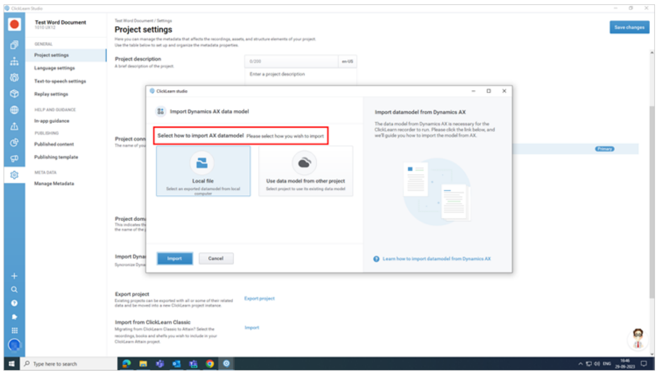


Click on the button **Start Dynamics AX data model importer**.



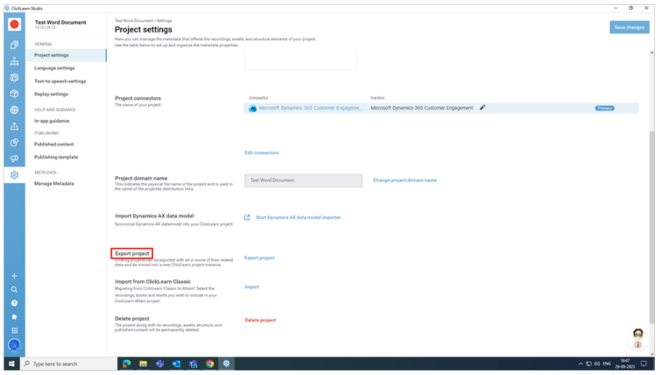
There are two ways in which you can import.

- **Local file:** Select an exported data model from a local computer.
- **Use data model from other project:** Select a project to use its existing data model.



7.1.1.7. Export Project

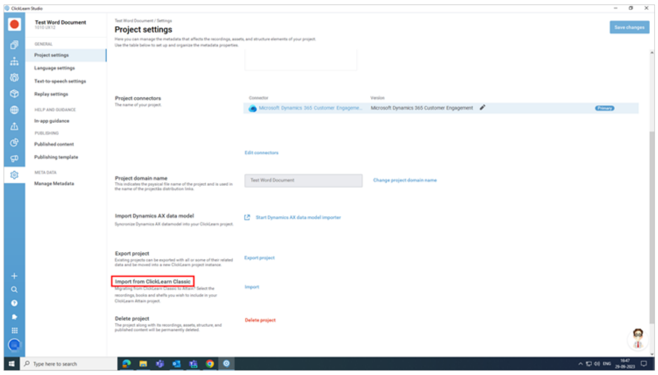
Export project: Existing projects can be exported with all or some of their related data and moved into a new ClickLearn project instance. Select the parts you wish to export.



7.1.1.8. Import from ClickLearn Classic

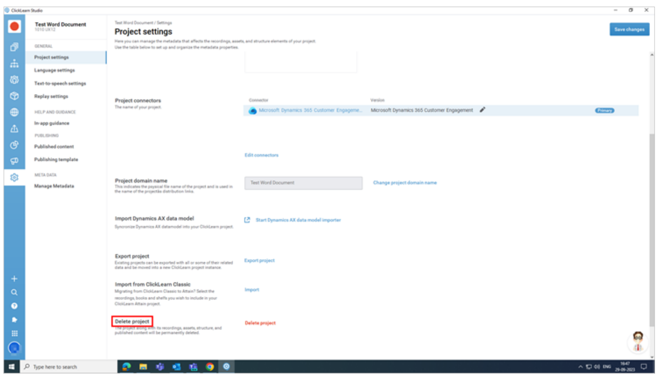
Import from ClickLearn Classic: Import your Classic project into ClickLearn Attain.

Select the recordings, books, and shelfs you wish to include in your ClickLearn Attain project.



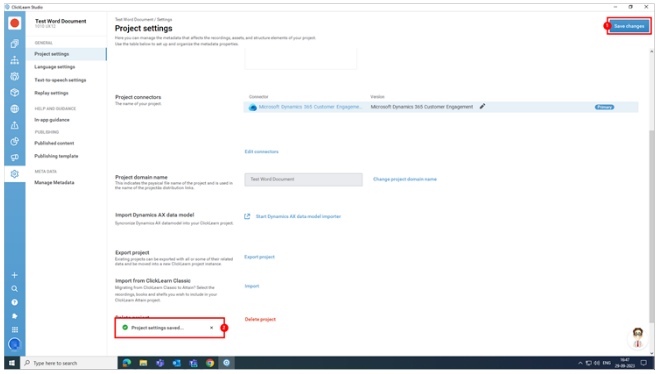
7.1.1.9. Delete Project

Delete project: The project, along with its recordings, assets, structure, and published content, will be permanently deleted.



7.1.1.10. Save Changes

Save Changes

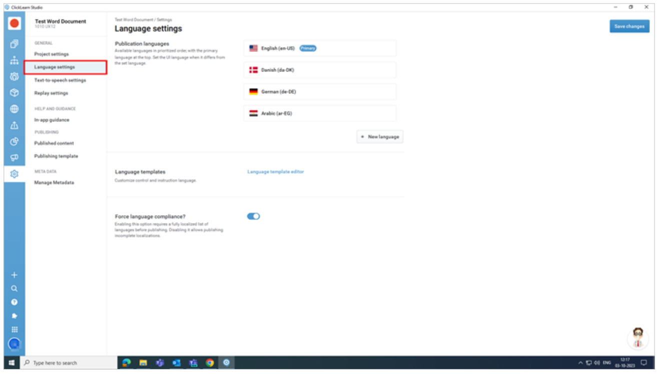


1. **Save changes:** This will save all your changes in project settings.
2. The screen displays a small message on the left: **Project settings saved**.

7.2. Overview of Language Settings

7.2.1. Introduction

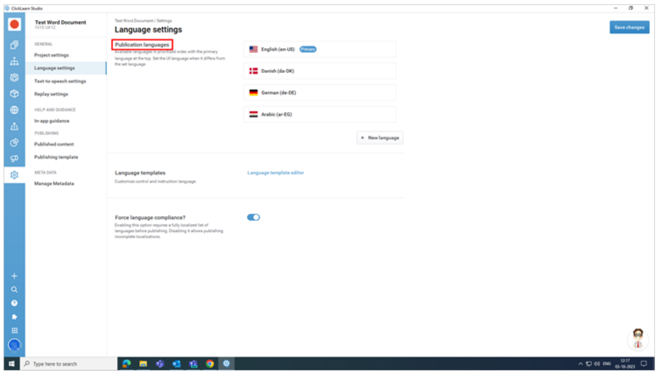
The **Language settings** allow you to incorporate and eliminate languages from your project. You can also modify various elements of the languages used for your projects.



7.2.1.1. Publication Languages

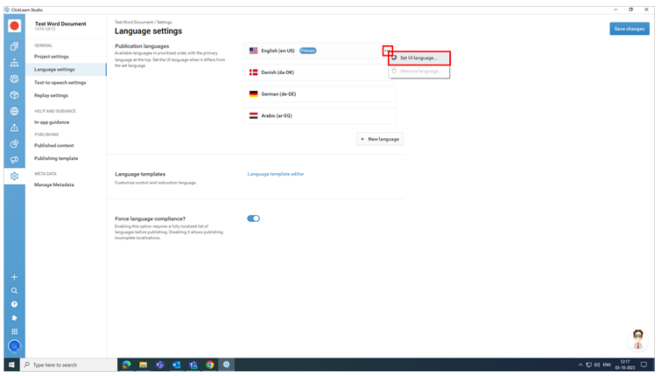
Publication languages: This displays the available languages ranked by importance, with the top one being the primary language.

You can also choose a different UI language if it differs from your preferred language. This way, you can make the UI and project language the same.



7.2.1.2. Set UI Language

Set UI Language



- **Set UI Language:** This option allows you to select the language for the user interface. You can see the available languages by clicking the **Set UI language** button and choosing the one that suits your project.
- To change the UI language, follow these steps.

  Select the language from the list.

  Click on the button.

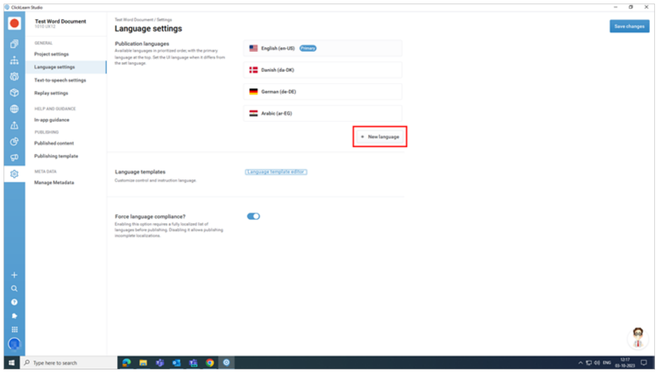
Click on **Set UI language**.

A new pop-up window appears with a list of languages.

Choose the UI language that suits your project requirements.

7.2.1.3. + New Language

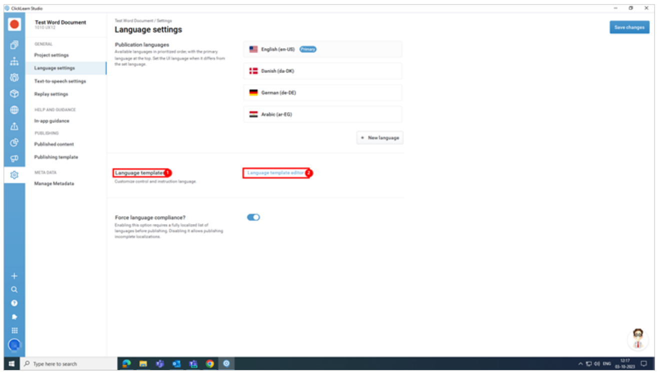
New language: You can view the list of languages you can use in your project.



7.2.1.4. Language Templates

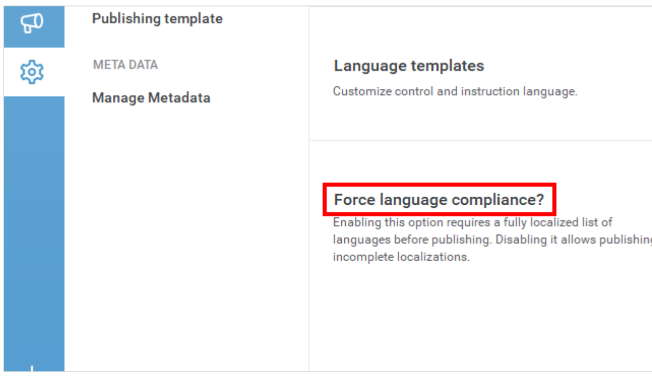
Language Template and Editor

1. **Language templates:** You can customize language templates based on your project requirements.
2. **Language template editor:** This allows you to edit each component of the language template.



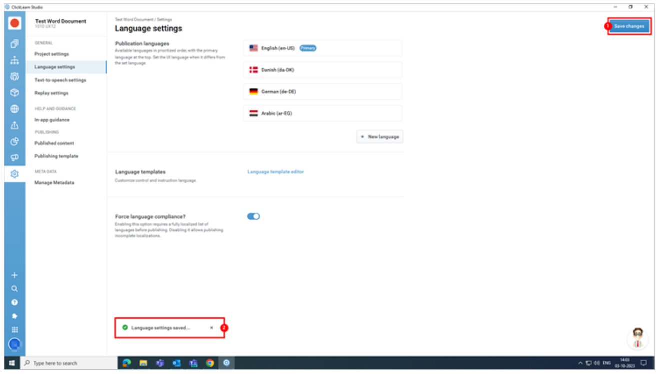
7.2.1.5. Force language compliance

Force language compliance: Enabling this option requires a fully localized list of languages before publishing. Disabling it allows the publishing of incomplete localizations.



7.2.1.6. Save Changes

Save Changes

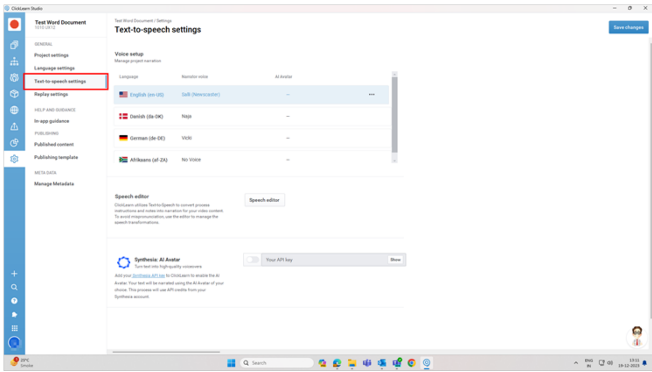


1. **Save changes:** This will save all your changes in language settings.
2. The screen displays a small message on the left: **Language settings saved.**

7.3. Text to speech

7.3.1. Overview of Text-to-speech Settings

7.3.1.1. Introduction

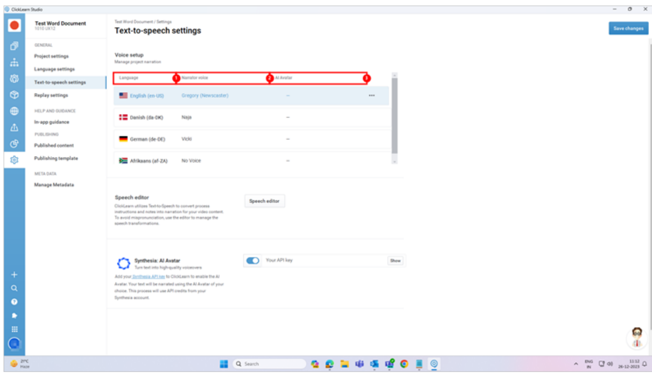


The **Text-to-speech settings** allow you to customize the voice, speed, volume, and timing of the audio narration for your videos and virtual assistants.

You can choose from various digital voices for different languages and accents and adjust the settings to suit your preferences and needs.

7.3.1.1.1. Voice Setup

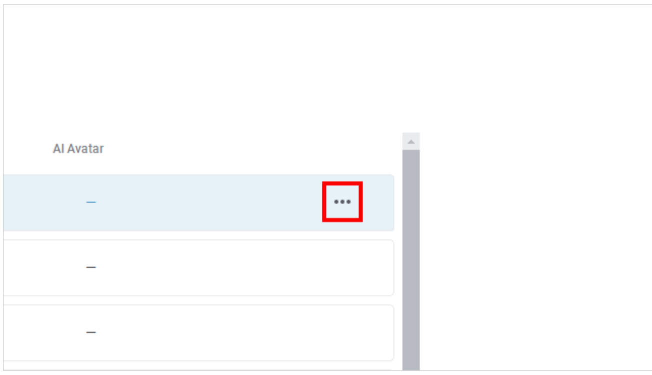
Voice setup



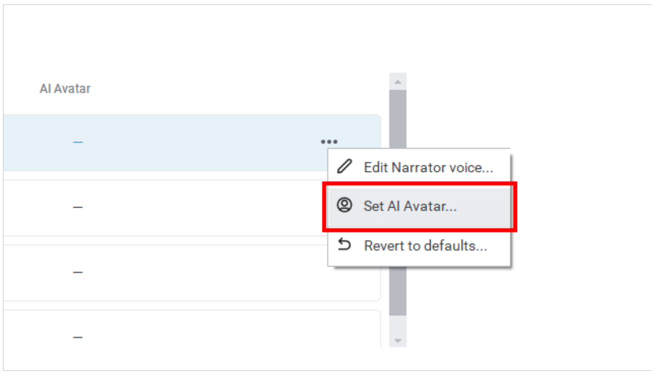
1. **Language:** This displays the list of languages you added to your project.
2. **Narrator voice:** This indicates the voice you selected for the language.
3. **AI Avatar:** This shows the AI Avatar you have chosen for the language.

7.3.1.1.2. AI Avatar

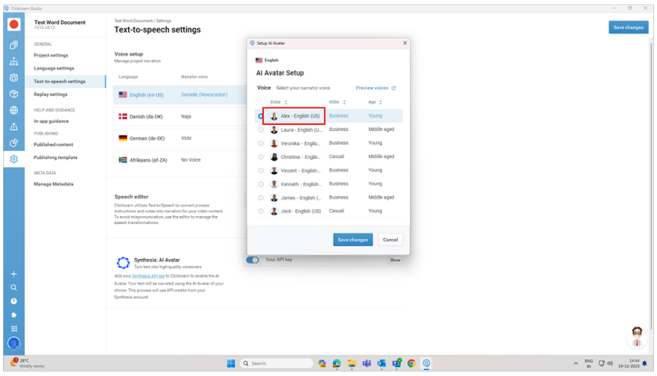
To set the AI Avatar for a particular language, click on the button **Edit** of grid cell **Action** associated with that language.



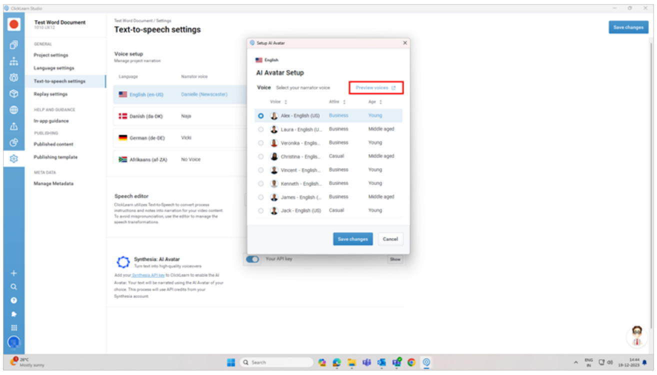
Click on the menu item **Set AI Avatar.**



You can customize the voice, attire, and age based on your project requirements. Here, we have selected the **Voice** with the value **Alex - English (US).**



The **Preview voices** button allows you to preview the voice.

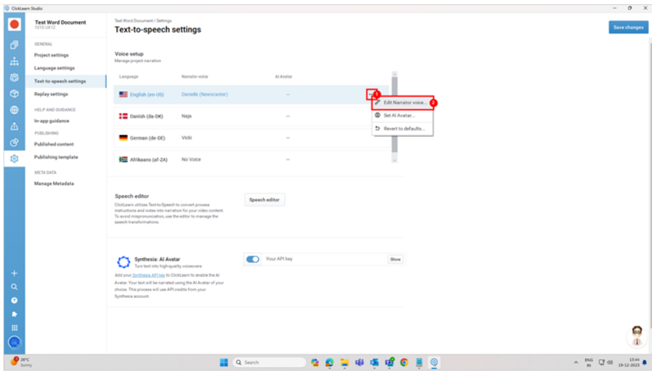


7.3.1.1.3. More Options

Edit Narrator Voice

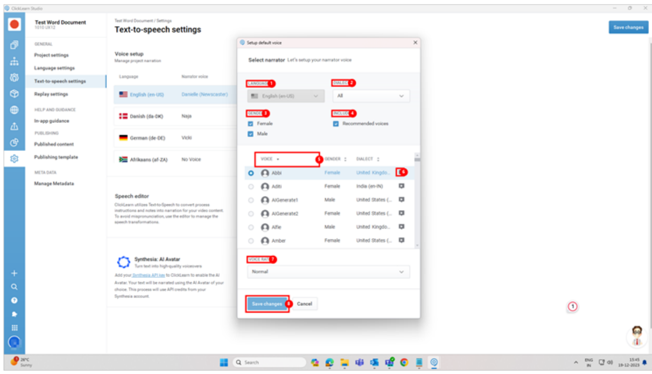
1. Click on the button **Edit** of grid cell **Action**.
2. Click on the menu item: **Edit Narrator voice.**

   This pops up with a new dialog, "**Setup default voice**," where you have the following options.



7.3.1.1.3.1. Setup Default Voice

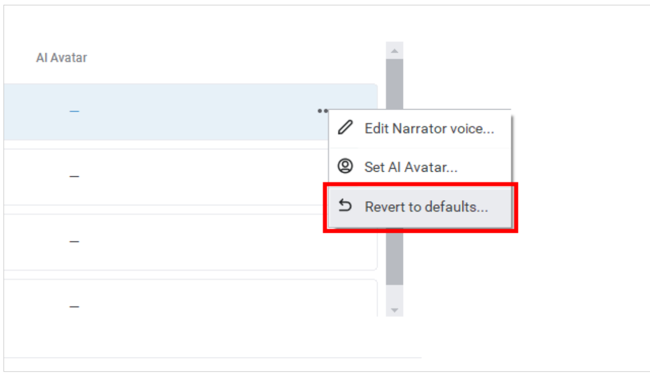
Setup default voice



1. **LANGUAGE:** This is the language that you have chosen for your narration.
2. **DIALECT:** This is the regional language variation you can select depending on your project goals.
3. **GENDER:** This is the option to choose a male or female voice for your narration.
4. **INCLUDE:** This feature allows ClickLearn Attain to suggest suitable voices for your language and dialect.
5. **VOICE:** This is the specific digital voice where you can choose from the available options for your narration.
6. Click on the button **More** of grid cell **Action.** This button lets you listen to a sample of the audio output with the selected voice and settings.
7. **VOICE RATE:** This setting controls how fast or slow the narration is. Based on your project requirements, you can set the voice rate as normal, extra slow, etc.
8. **Save changes:** This will save all the changes you have done in the setup default voice window.

7.3.1.1.3.2. Revert to defaults

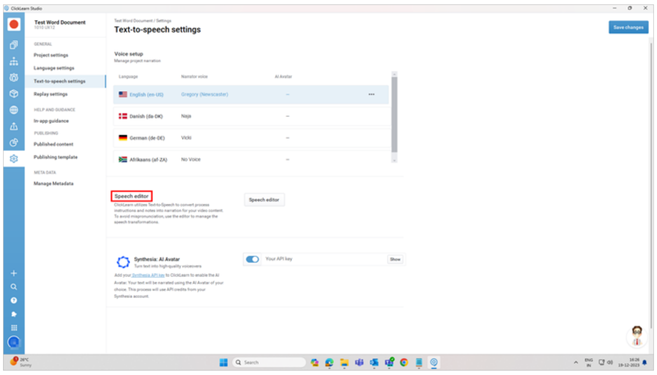
Revert to defaults: This option restores all the settings to their original values.



7.3.1.1.4. Speech Editor

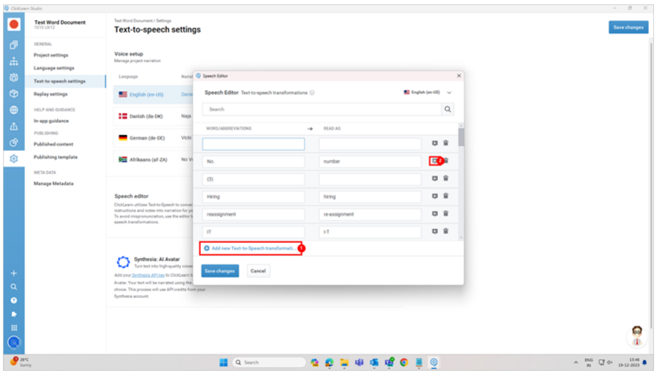
Speech editor: ClickLearn Attain utilizes Text-to-Speech to convert process instructions and notes into narration for your video content. To avoid mispronunciation, use the editor to manage the speech transformations.

You can configure regularly used terms and how you want them narrated in your project.



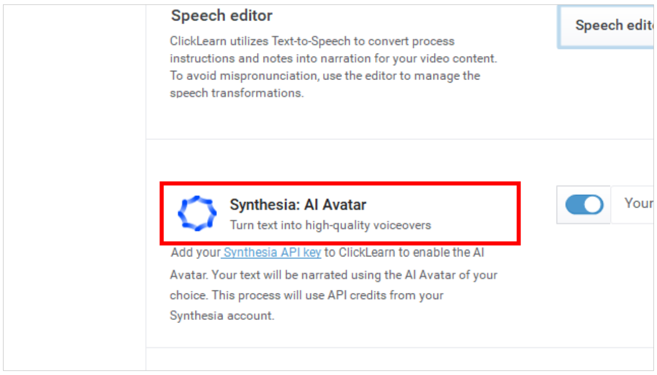
Speech Editor

1. Click on the button: **Add new Text-to-Speech transformation** to add new words for your project.
2. Click on the button: **More** of grid cell **Action,** allowing you to listen to your selected audio.

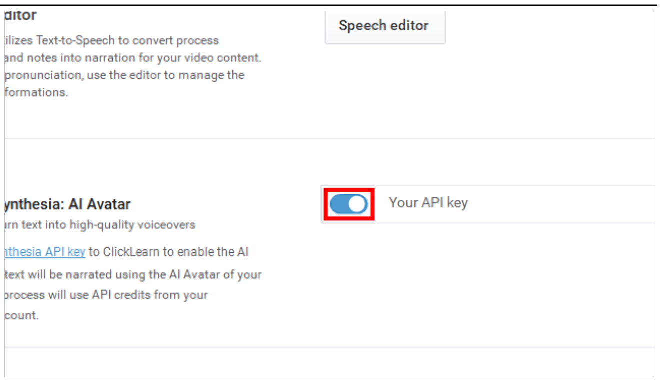


7.3.1.1.5. Synthesia: AI Avatar

You can use the **Synthesia: AI Avatar** to turn your text into high-quality voiceovers. Your text will be narrated using the AI Avatar of your choice.



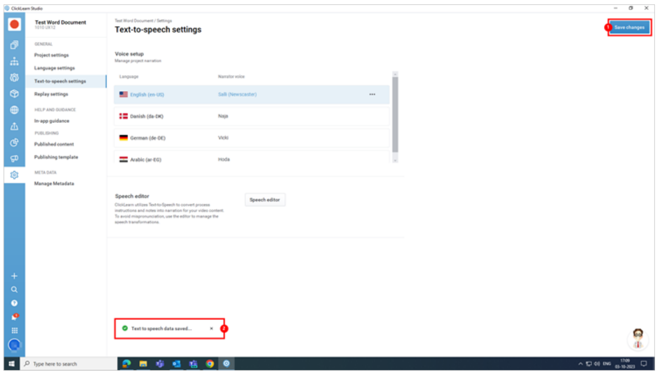
Click on the toggle switch **Toggle On Off** to enable the API key.



7.3.1.1.6. Save Changes

Save Changes

1. **Save Changes:** This will save all your changes in text-to-speech settings.
2. The screen displays a small message on the left: **Text-to-speech data saved**.

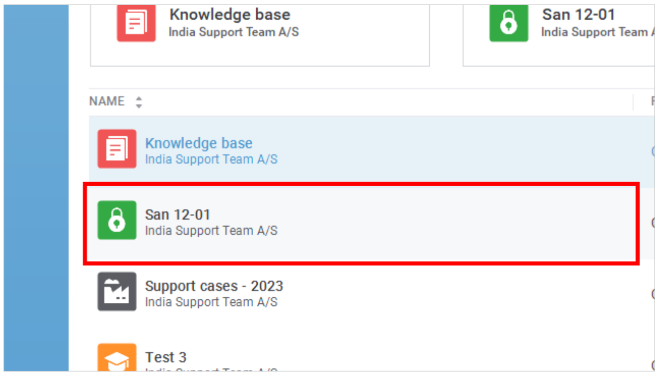


7.3.2. Copy Text-to-speech between projects

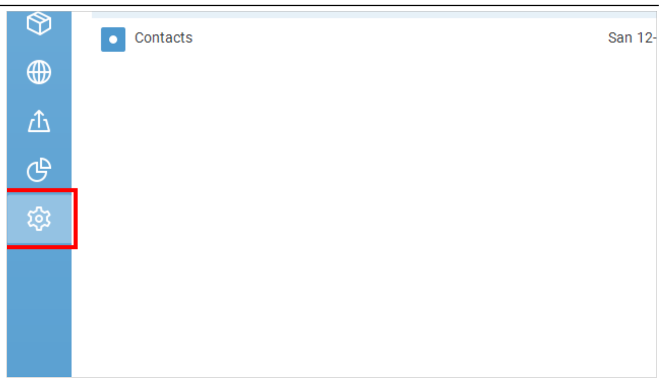
We can use this setting to narrate abbreviations or shorthand words used in recordings.
Suppose we have an abbreviation "BC" used in recording; we can add "Business Central" against it in a text-to-speech setting so that wherever BC is written, it is narrated as Business Central.

7.3.2.1. Add text-to-speech

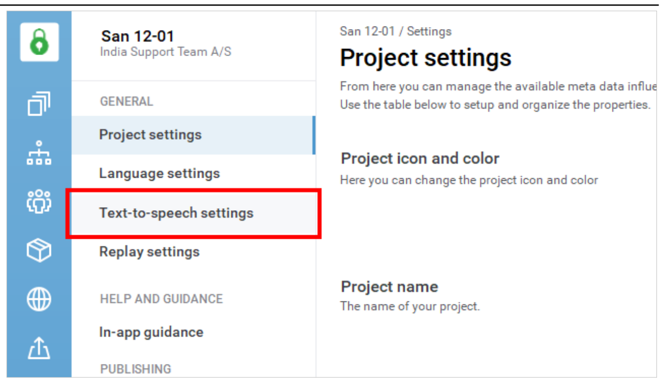
Double-click on the grid cell **NAME** with the value **San 12-01**.



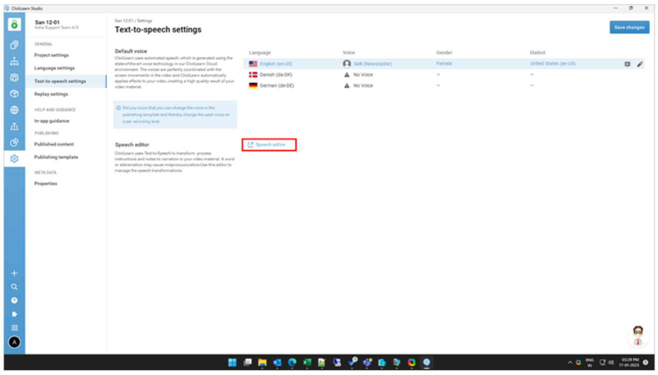
Click on the **Settings** button.



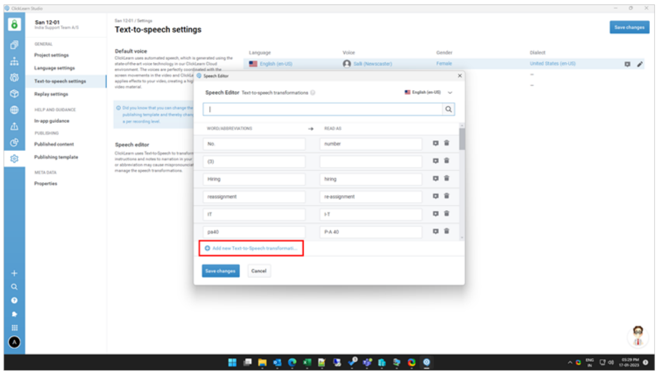
Click on the button **Text-to-speech settings**.



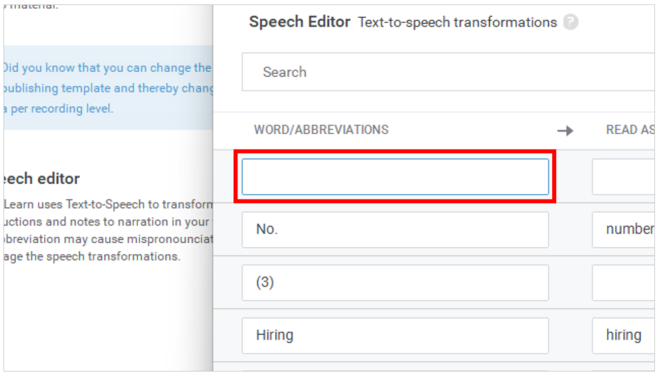
Click on the **Speech editor** button.



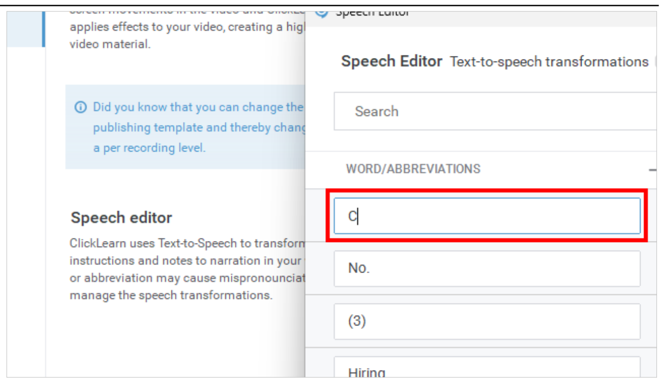
Click on the button: **Add new Text-to-Speech transformation**.



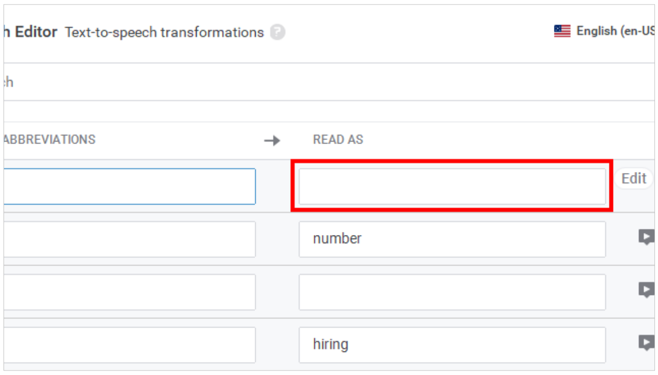
Click on the text box to enter **word/Abbreviations**.



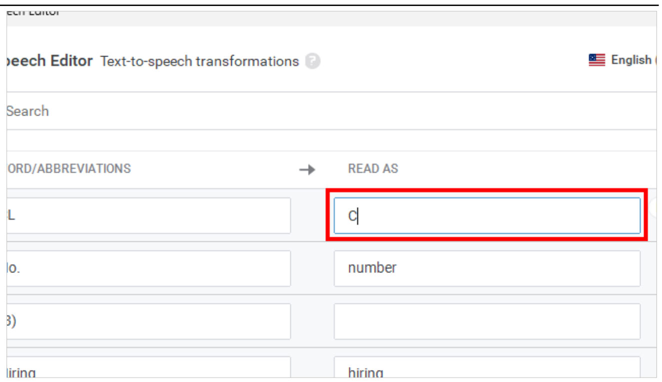
Enter the text **CL**.



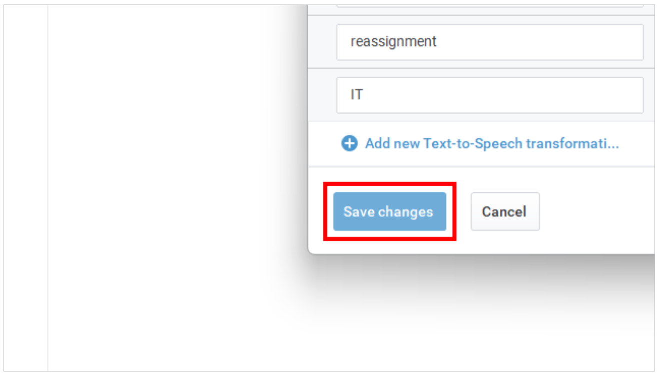
Click on the textbox to enter **Read As** text.



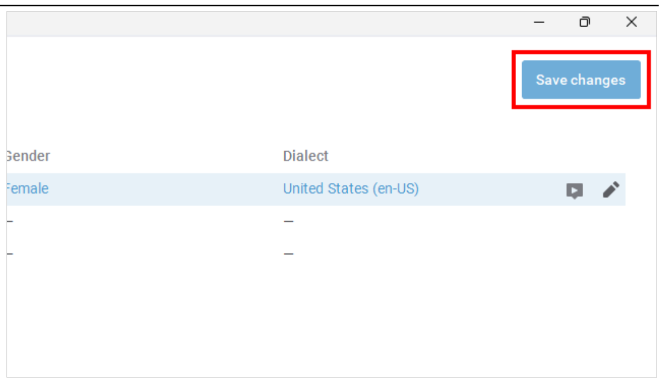
Enter the text **Clicklearn**.



Click on the button **Save changes**.



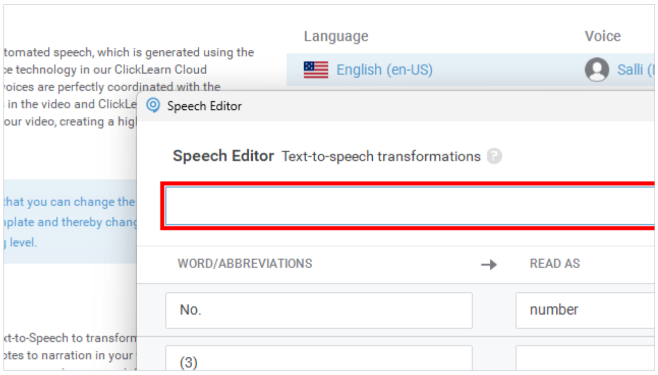
Click on the button **Save changes**.



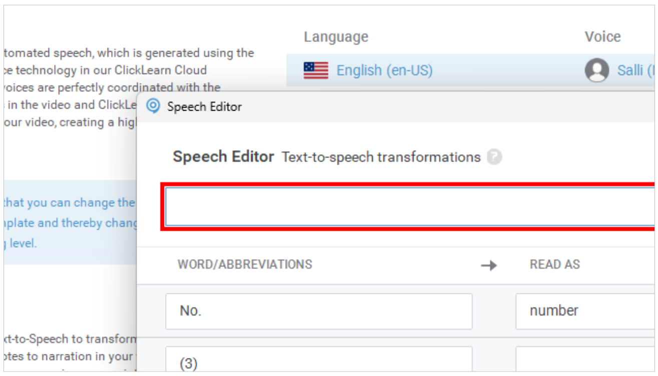
7.3.2.2. Copy text-to-speech to other project

In the latter project >> Settings >> Text-to-speech settings
Click on the **Speech editor** button.

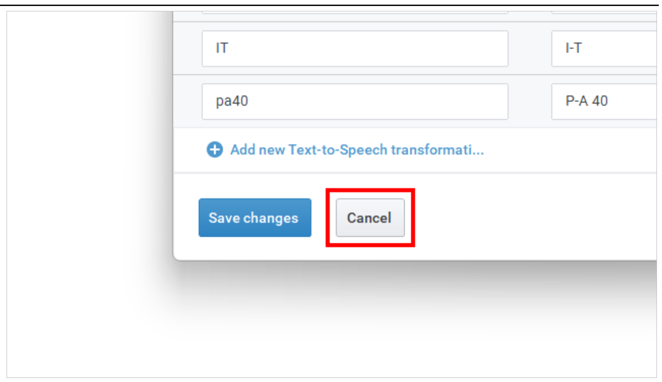
Click on the input textbox **Search** with the value **Search**.



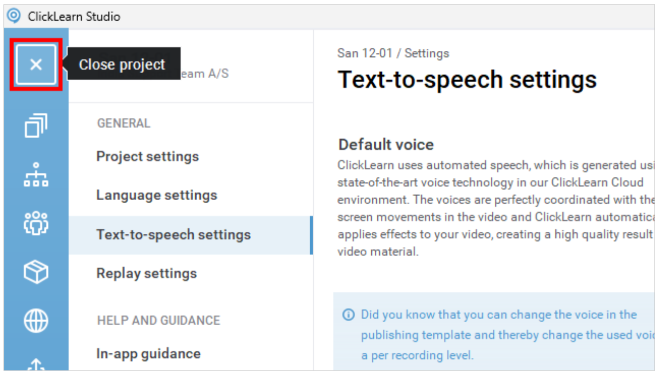
Press **CTRL+c**.



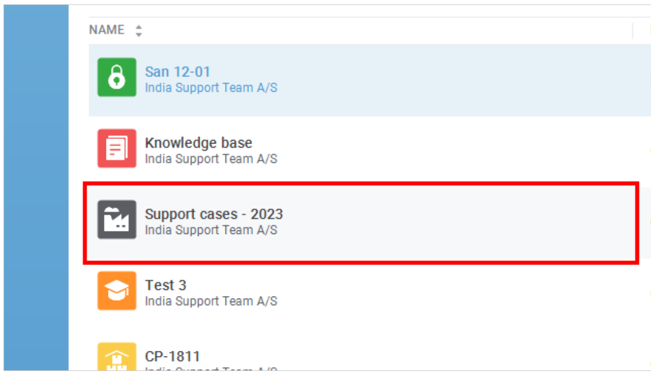
Click on the button **Cancel**.



Click on the button **Close project**.

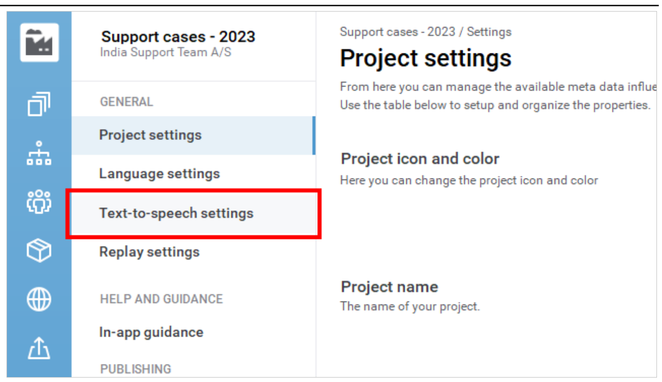


Choose a destination project on which you would like to paste the copied text-to-speech.
Double-click on the grid cell **NAME** with the value **Support cases - 2023**.



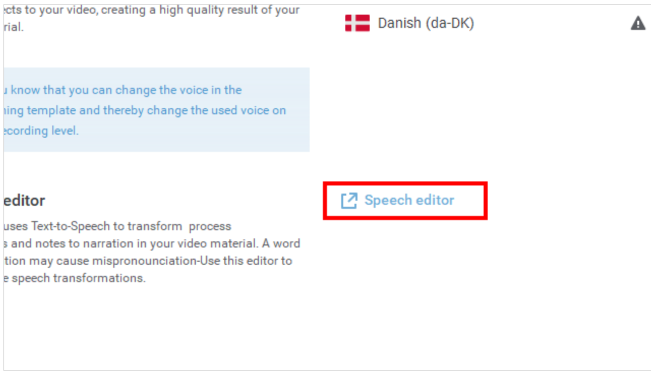
Click on the **Settings** button.

Click on the button **Text-to-speech settings**.

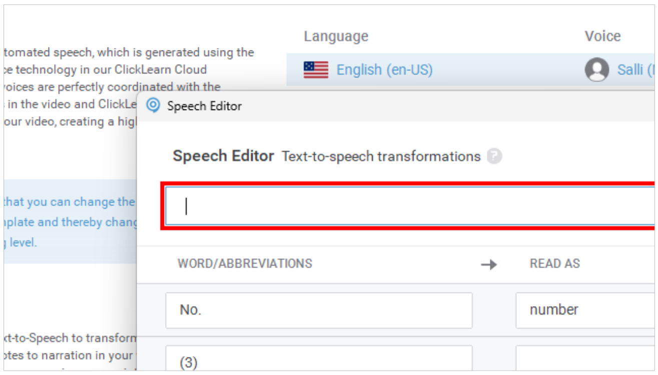


kag@clicklearn.com

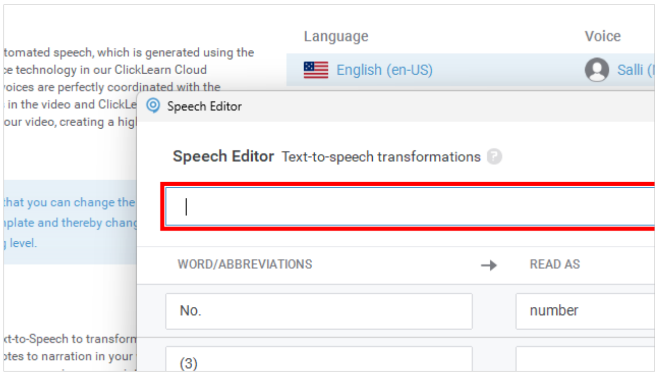
Click on the **Speech editor** button.



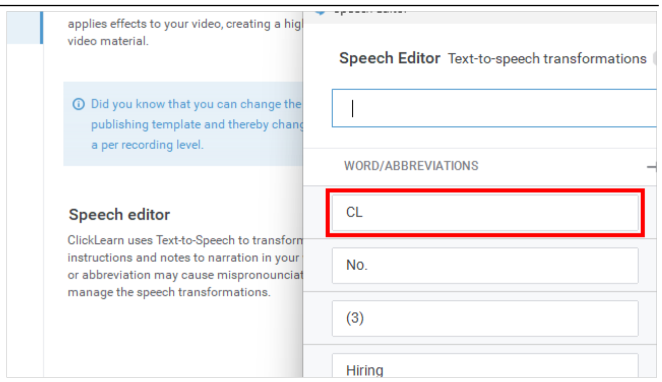
Click on the input textbox **Search** with the value **Search**.



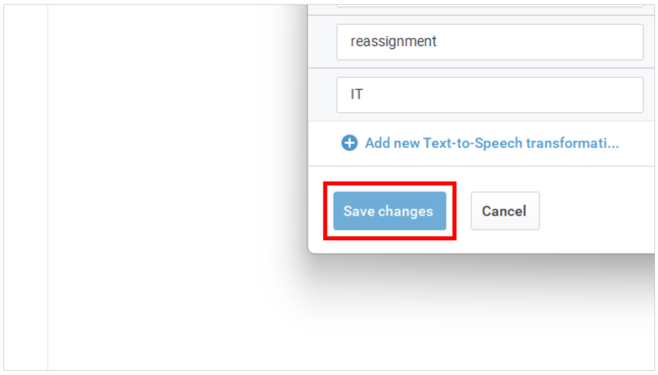
Press **CTRL+v**.



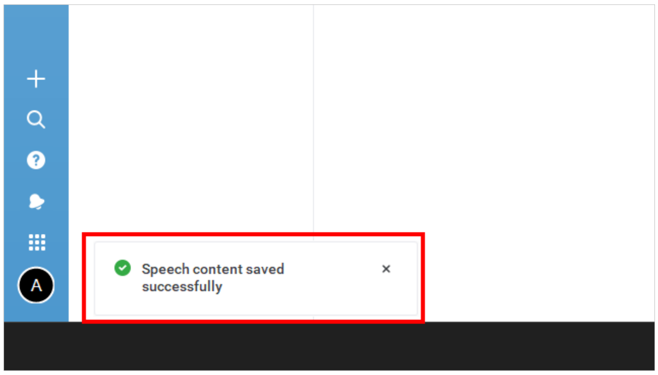
Verify that if it has pasted your content.
Click on the grid view cell **WORD/ABBREVIATIONS** with data **CL**.



Click on the button **Save changes**.

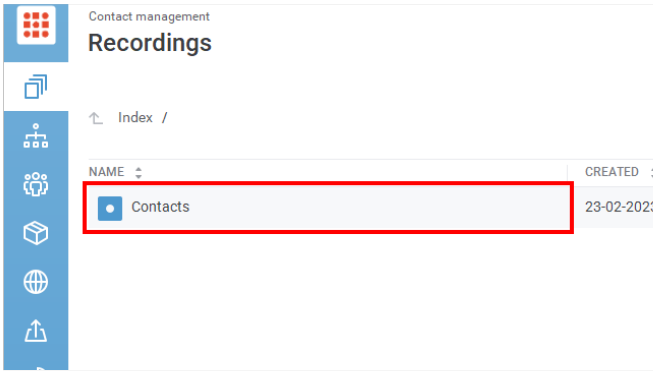


Make sure your content is saved successfully.

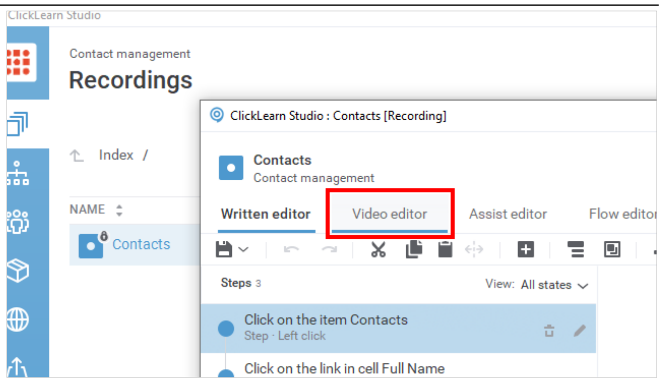


7.3.3. Use custom audio in recordings

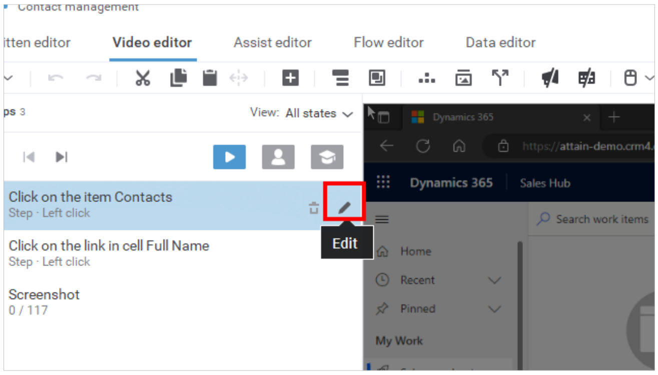
Open the recording in which you wish to add custom audio.



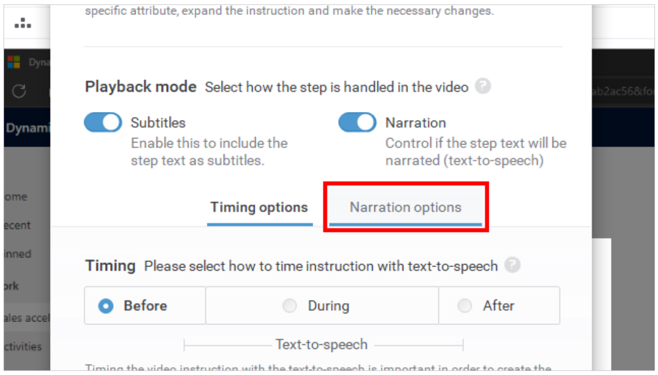
Click on the tab item **Video editor.**



Choose the step where you want to add custom audio.
Click on the button **Edit.**

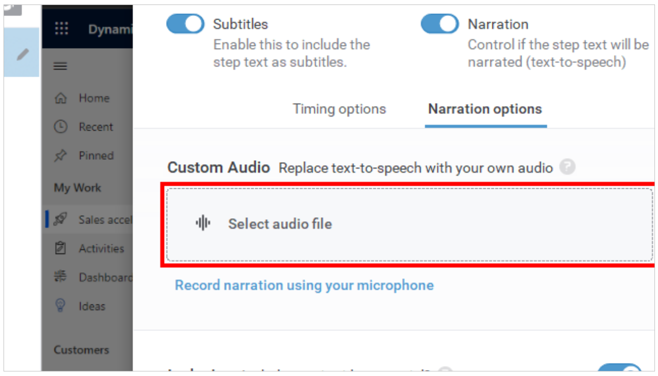


Click on the tab item **Narration options.**

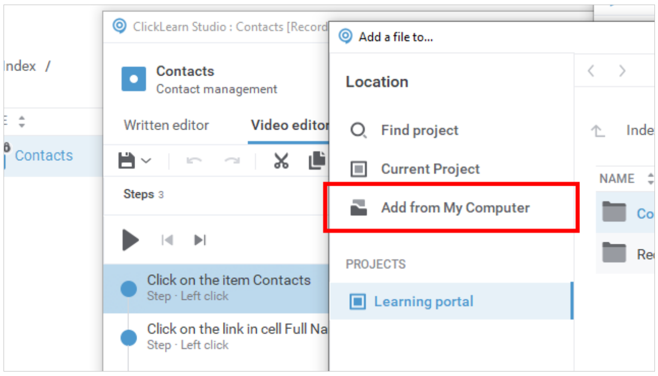


7.3.3.1. Add custom audio using an audio file

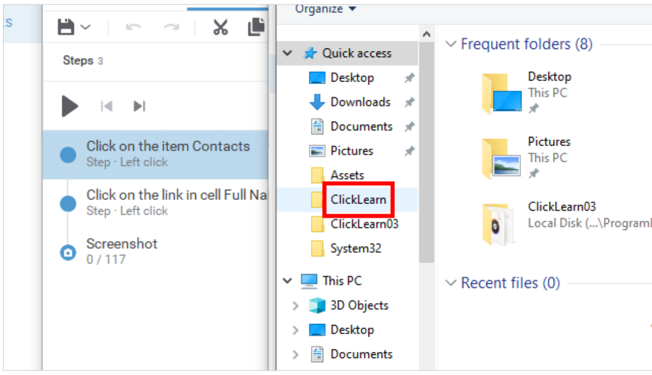
Click on the button **Select audio file.**
This option will allow users to choose an audio file from their local machine for the selected step.



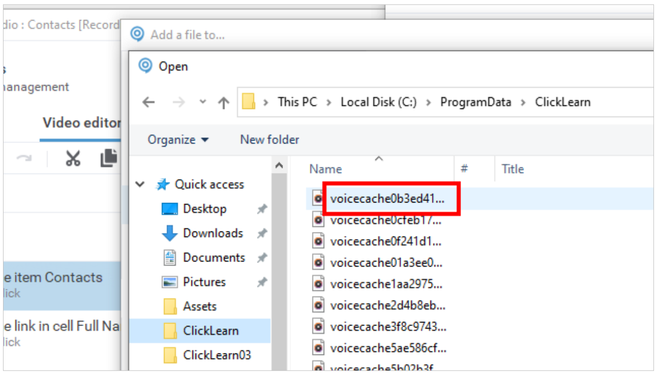
Click on the button **Add from My Computer**.



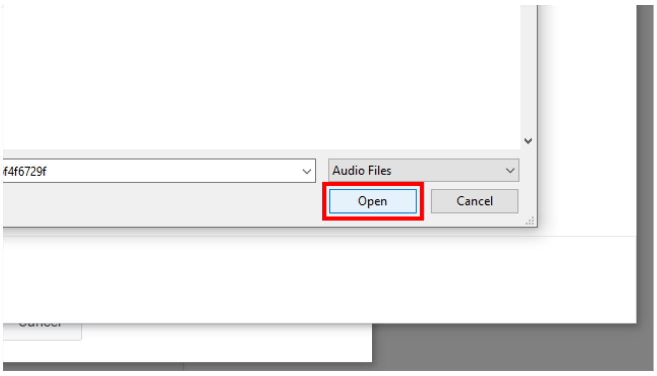
Click on the folder **ClickLearn**.



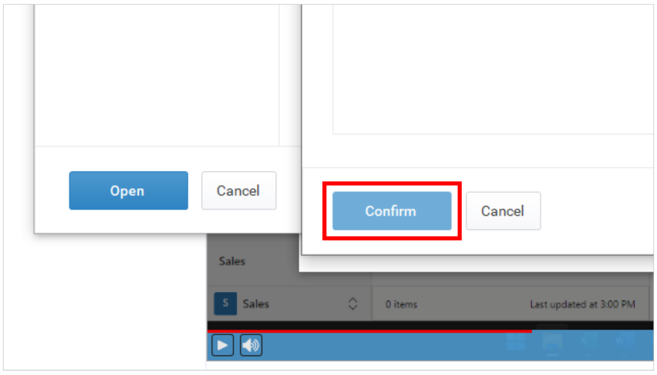
Select an audio file from your machine.



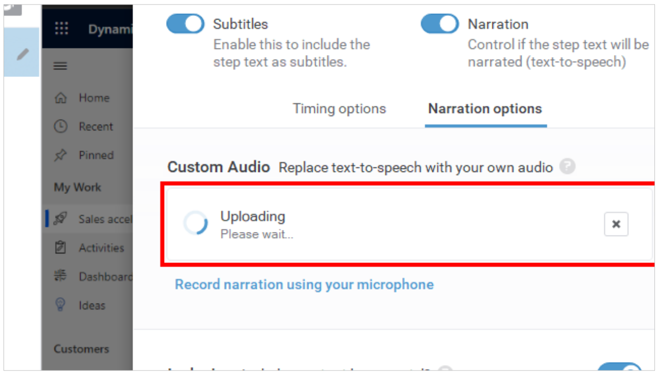
Click on the **Open** button.



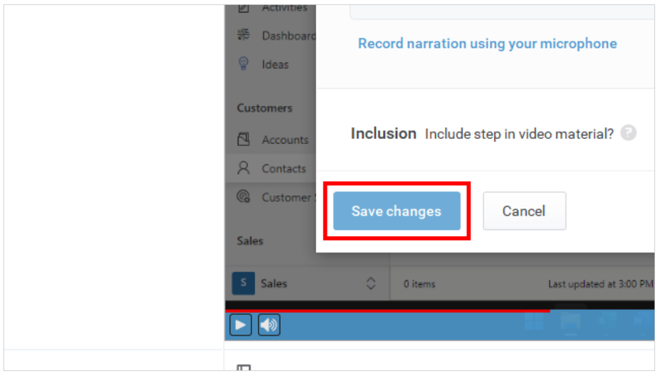
Click on the button **Confirm**.



Please wait until the audio is uploaded to your assets in ClickLearn cloud.

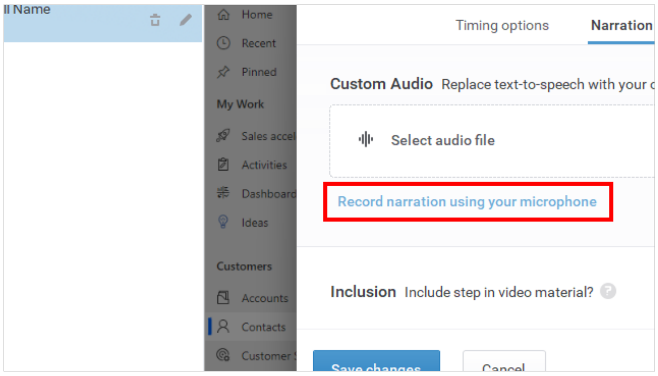


Click on the button **Save changes**.

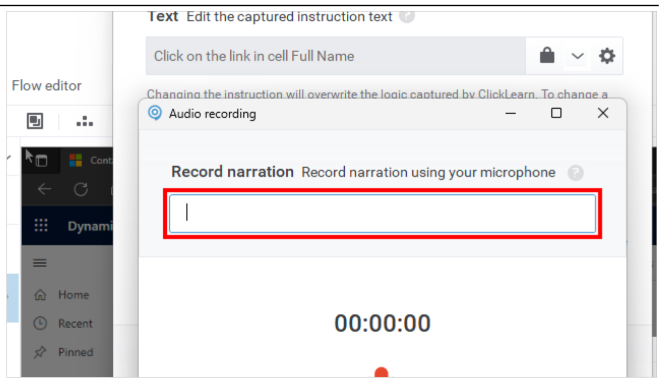


7.3.3.2. Record voice using a microphone

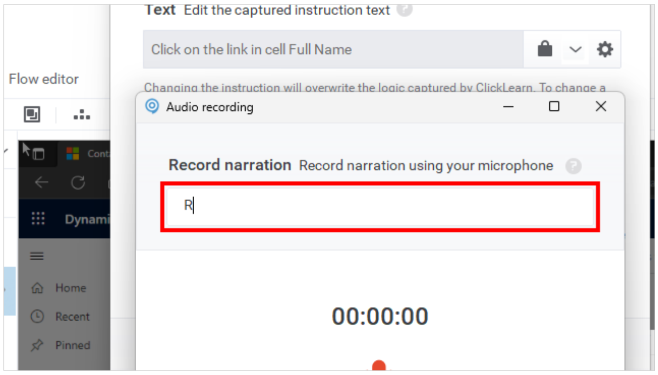
Click on the button: **Record narration using your microphone**.



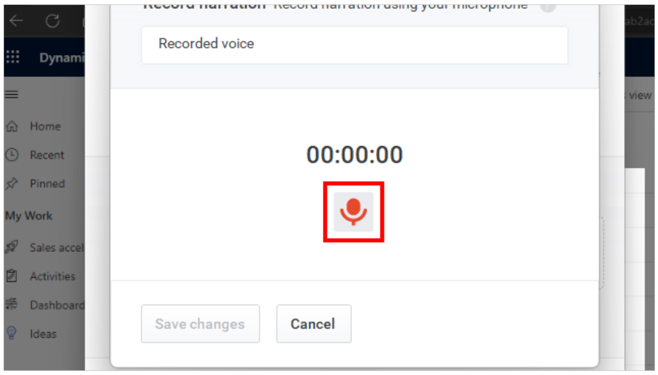
Click on the textbox **AudioName**.



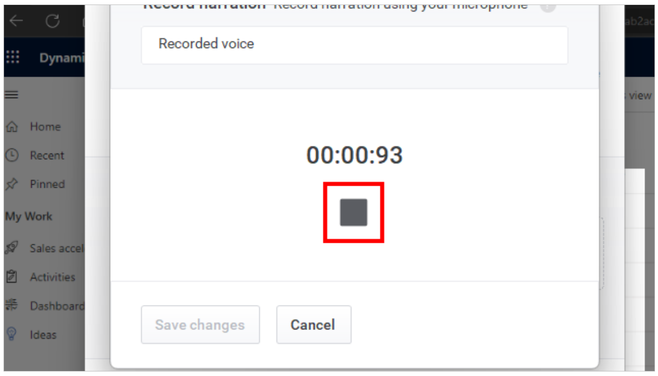
Enter **AudioName**.



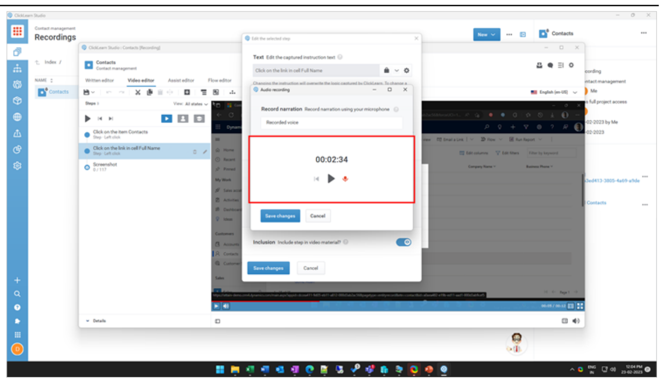
Click on the link icon, **Microphone.**
After clicking the Microphone button, sound from your PC's Microphone will be recorded until you click the stop button.



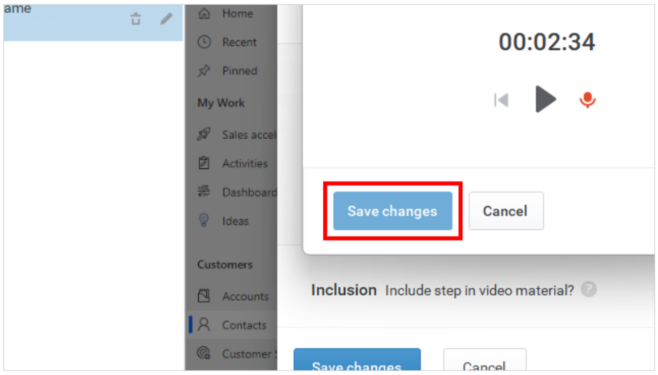
Click on the link icon: **Stop** after you have recorded your voice.



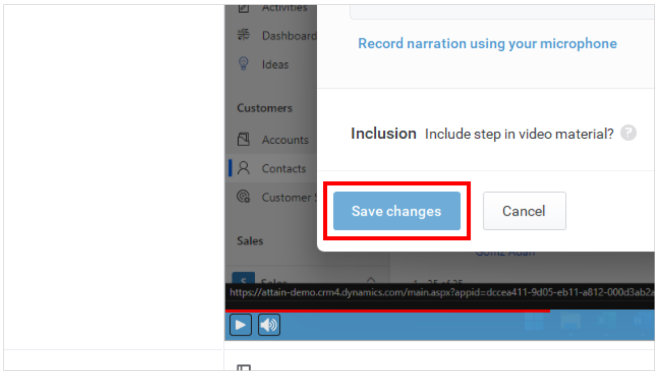
Here, you can playback your audio by clicking on the play button, and if you are not satisfied, you can re-record the audio.



Once you are satisfied with your audio recording, you can save it.
Click on the button **Save changes**.

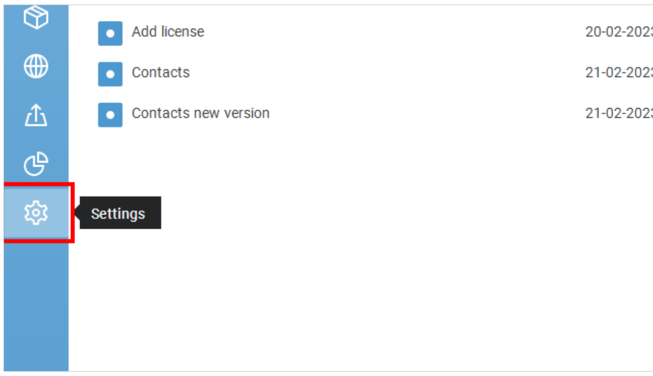


Click on the button **Save changes**.

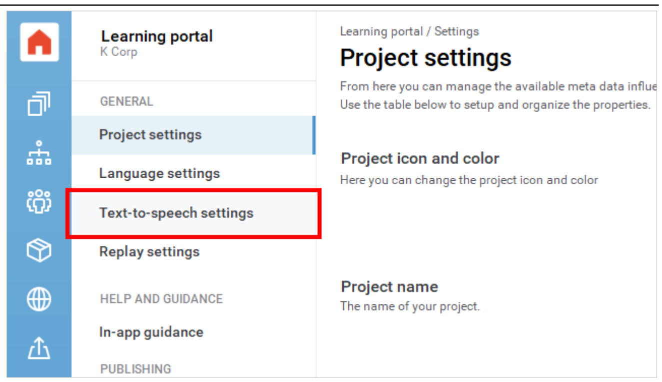


7.3.4. Change default voice

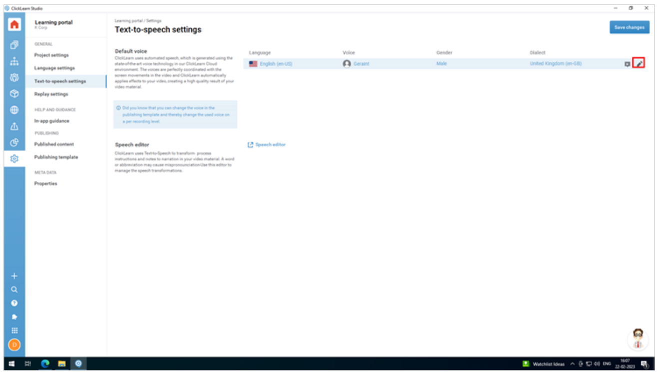
Click on the **Settings** button.



Click on the button **Text-to-speech settings.**

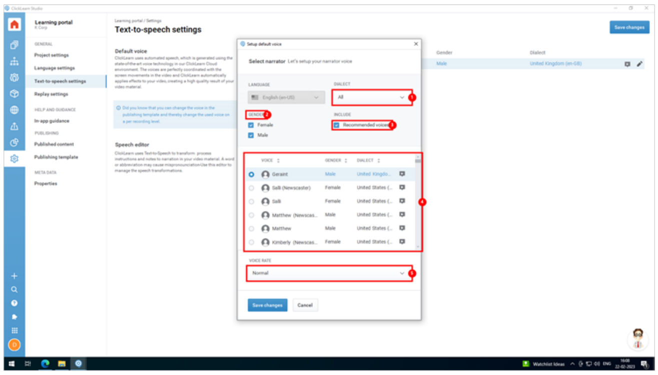


Click on the button **Edit.**

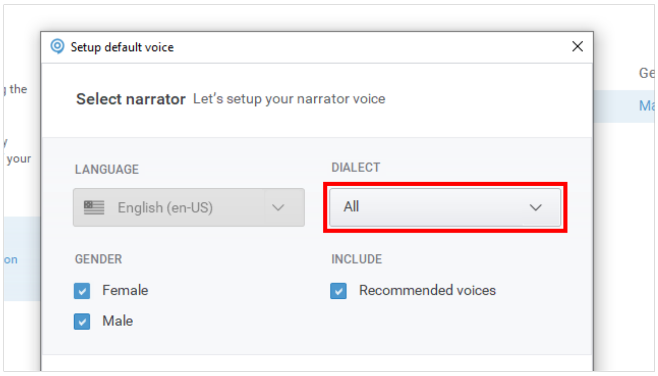


Select narrator

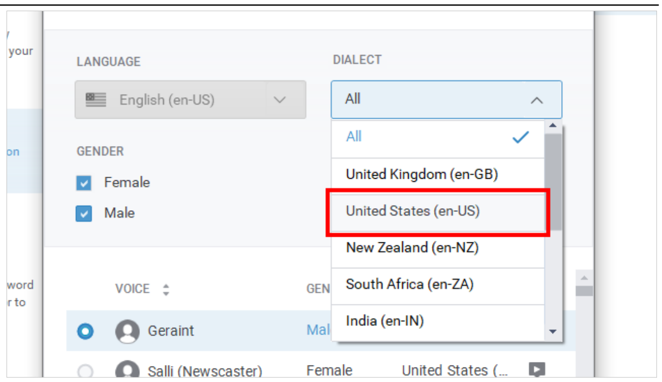
1. **Dialect**: To see languages of a particular dialect, select it from the dropdown list.
2. **GENDER**: Voice filtration is available gender-wise as well.
3. **Recommended voices**: For better options, ClickLearn Attain will recommend some voices if this is checked.
4. **List of voices**: This is the list of voices filtered based on the selection.
5. **VoiceRate**: Select the rate at which the speech is narrated.



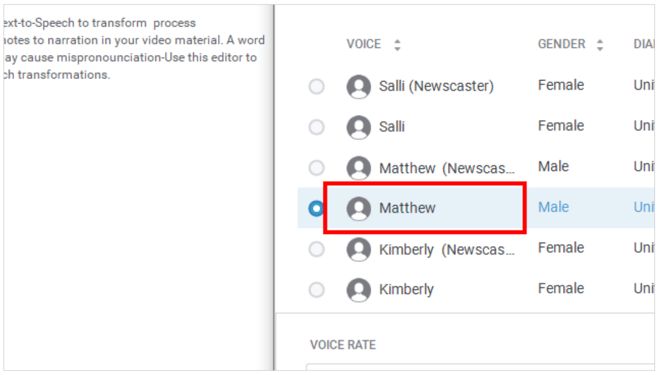
Click on the dropdown **Dialect**.



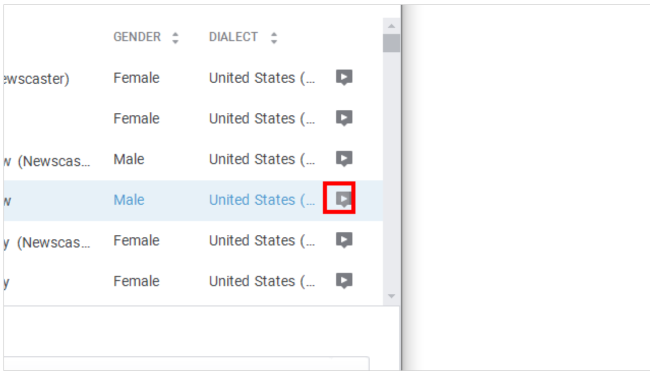
Click on the dropdown item **United States (en-US)**.



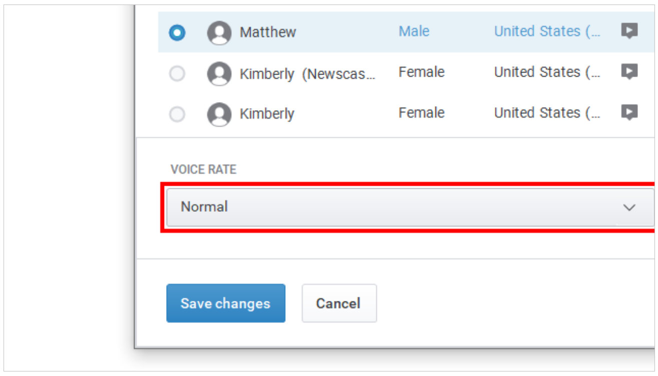
Click on the grid cell **VOICE** with the value **Matthew**.



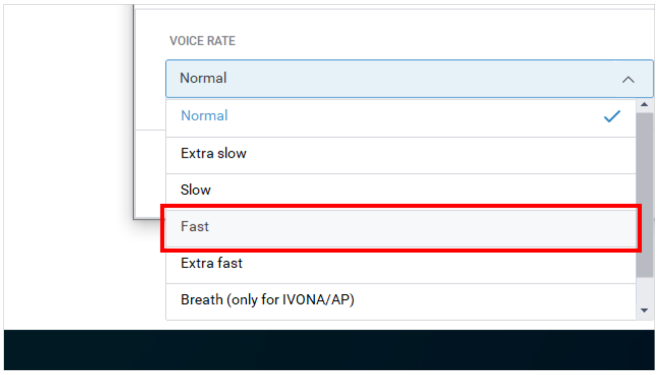
Click on the button **More** of grid cell **Action**.
You can preview the narration by clicking the highlighted button.



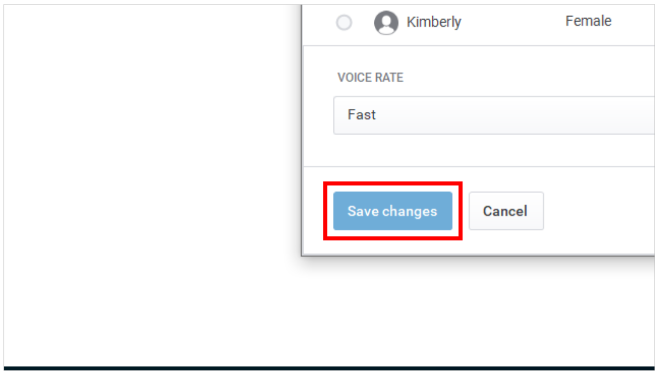
Click on the dropdown **VoiceRate**.



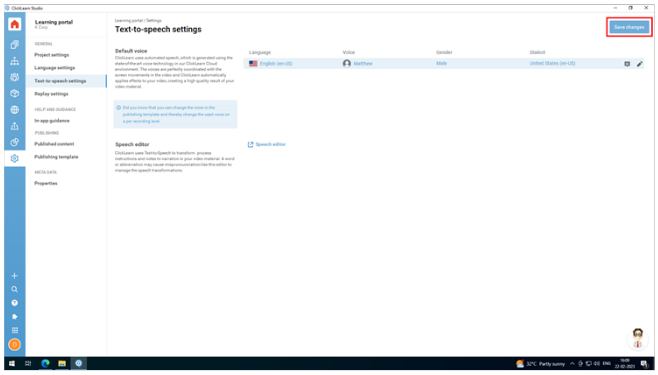
Click on the dropdown item **Fast**.



Click on the button **Save changes**.



Click on the button **Save changes**.



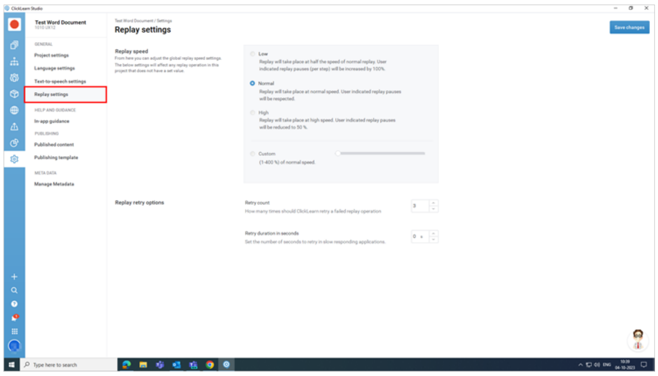
7.4. Overview of Replay Settings

7.4.1. Introduction

Replay settings: Replay is a feature that allows you to update your recordings automatically when there are changes in your business system or application.

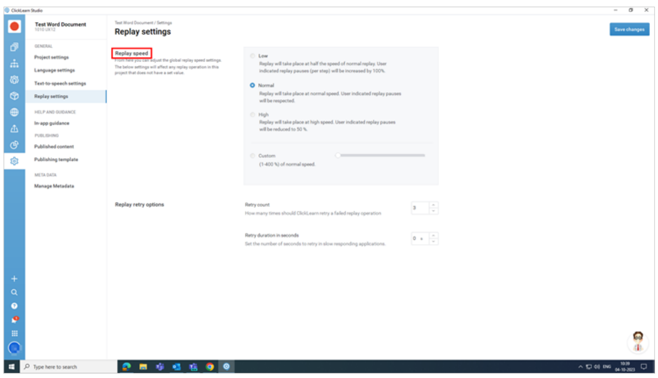
With the help of this feature in ClickLearn Attain, you do not need to re-record everything from scratch when you plan to keep your content current and consistent.

From here, you can control how replay works in your project.

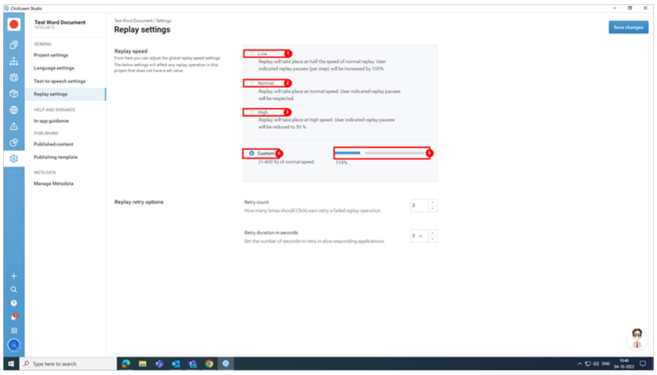


7.4.1.1. Replay Speed

Replay speed: You can adjust the global replay speed settings from here. These settings will affect any replay operation in this project that does not have a set value.



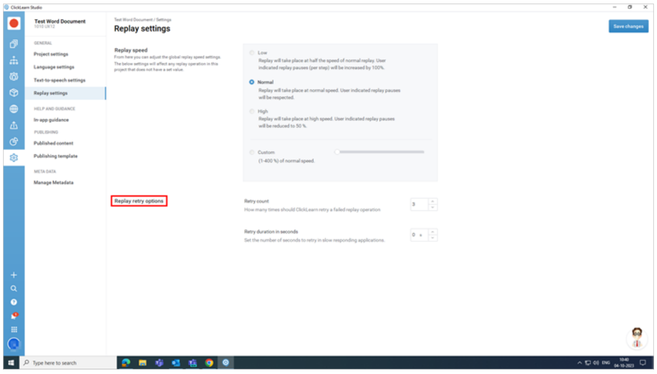
Replay Speed



1. **Low:** Replay will take place at half the speed of average replay. The user indicated replay pauses (per step) would be increased by 100%.
2. **Normal:** Replay will take place at average speed. The user indicated replay pauses will be respected.
3. **High:** Replay will take place at high speed. The user indicated replay pauses will be reduced to 50%.
4. **Custom:** You can customize the replay speed. You can set the replay speed depending on your project needs.
5. **Track bar:** With the help of the track bar, you can adjust the replay speed.

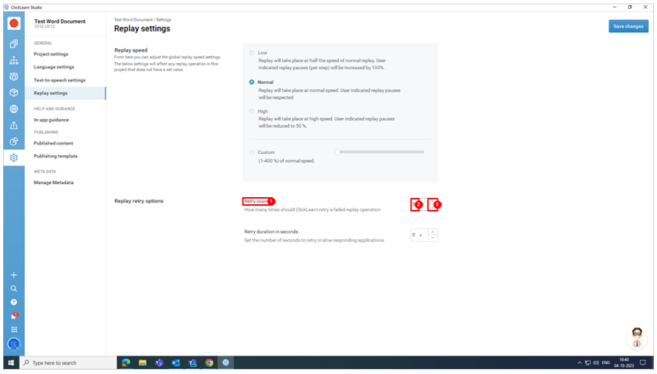
7.4.1.2. Replay Retry Options

You can manage the **Replay retry options** from here.



7.4.1.2.1. Retry Count

Retry Count

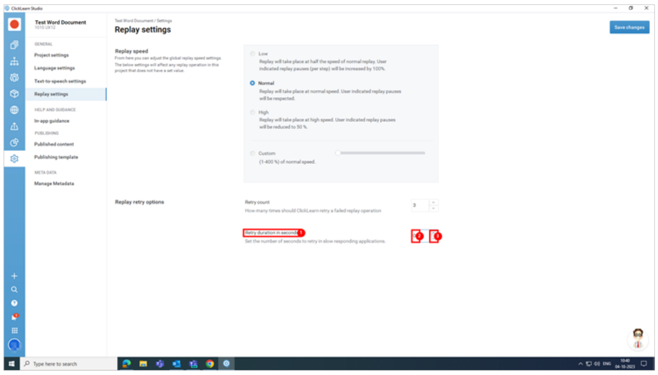


1. **Retry count:** You can set the value of how many times ClickLearn Attain should retry a failed replay operation.
2. You can set the number of retry options you want. In our case, we have set it to 3. That is, it will try three times for a failed replay.
3. You can also adjust the numbers from the up and down arrow keys.

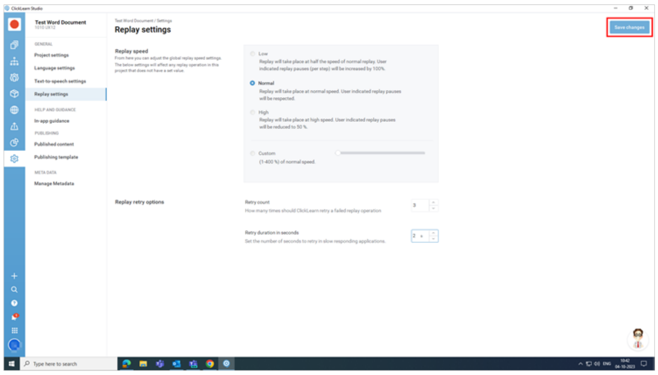
7.4.1.2.2. Retry duration in seconds

Retry duration in seconds

1. Click on the label **Retry duration in seconds**.
2. Here, you can set the number of seconds to retry in slow-responding applications.
3. You can also adjust the numbers from the up and down arrow keys.



Click on the button **Save changes**.



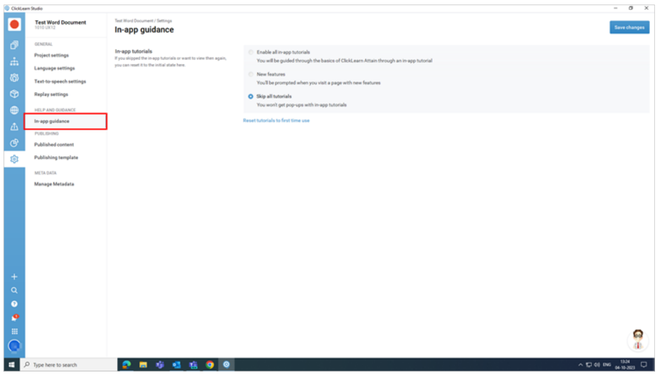
7.5. In-app guidance

7.5.1. Introduction

In-app guidance is a feature that provides you with interactive tutorials inside your project.

From here, you can adjust the settings of the in-app tutorials.

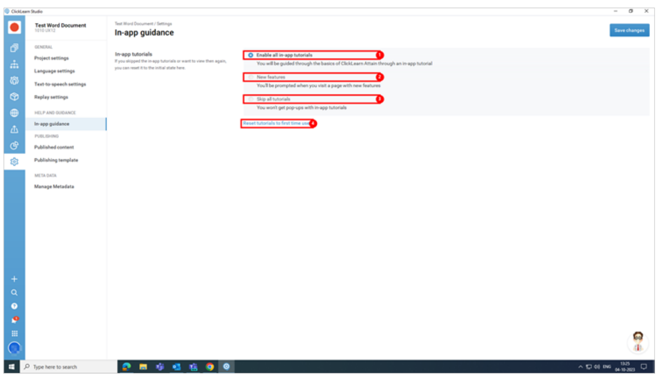
If you have skipped the in-app tutorials or want to view them again, you can reset it to the initial state here.



7.5.1.1. In-app tutorials

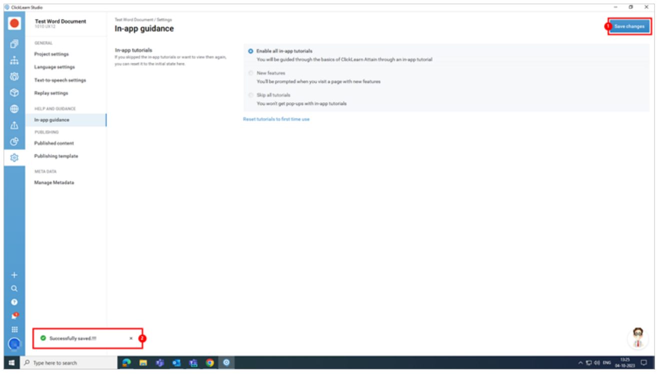
In-app tutorials

1. **Enable all in-app tutorials:** An in-app tutorial will show you how to use the basic features of ClickLearn Attain.
2. **New features:** A prompt will appear when you access a page with new features.
3. **Skip all tutorials:** You won't get pop-ups with in-app tutorials. It will skip all the tutorials.
4. **Reset tutorials to first time use:** The tutorial pop-ups appear when you log in to ClickLearn Attain for the first time. If you log in for the second time, the pop-ups do not appear.



7.5.1.2. Save Changes

Save Changes

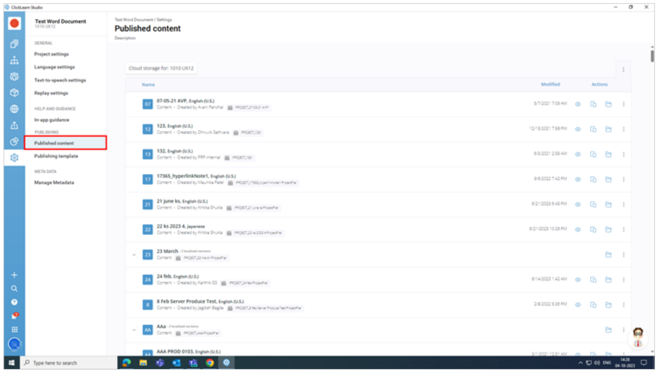


1. **Save changes:** This will save all your changes in in-app guidance.
2. The screen displays a small message on the left: **Successfully saved**.

7.6. Published Content

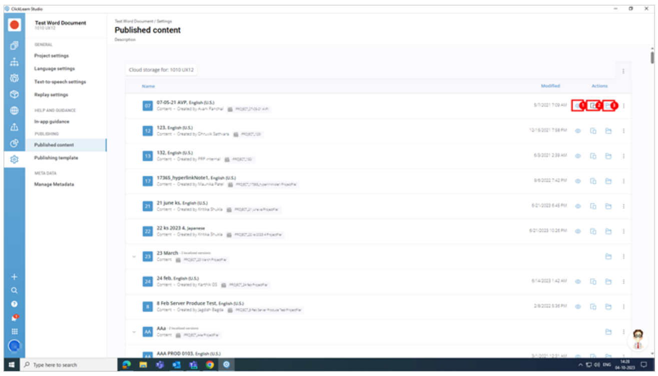
7.6.1. Introduction

Published content: You can see the list of published content published by the users working within your organization.



7.6.1.1. Actions

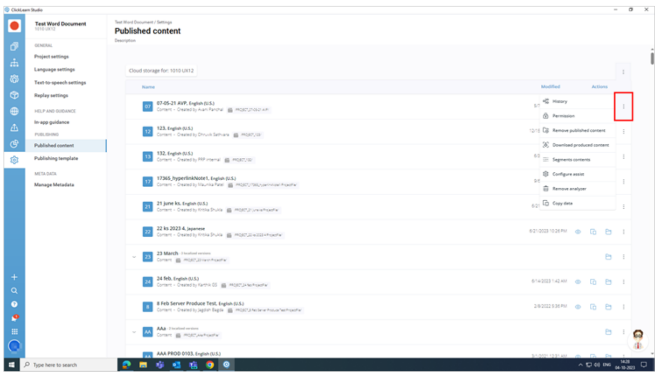
Options associated with the action menu



1. **View content:** You can view the published content.
2. **Copy:** This will copy your content to the clipboard.
3. **Project Folder:** It opens the folder location where the project is stored.

7.6.1.2. More

The other options associated with the published content are listed below.

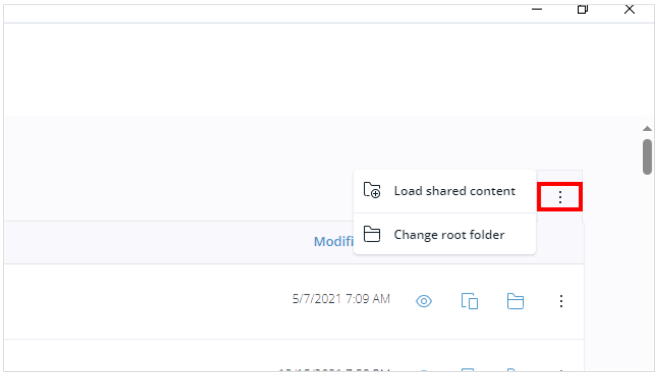


- History
- Permission
- Remove published content
- Download produced content
- Segments content
- Configure assist
- Remove analyzer
- Copy data

7.6.1.3. Other Elements

Load shared content: If you share a recording/structure, it will load that particular content.

Change root folder: This option allows you to change the root folder.



7.7. Publishing Template

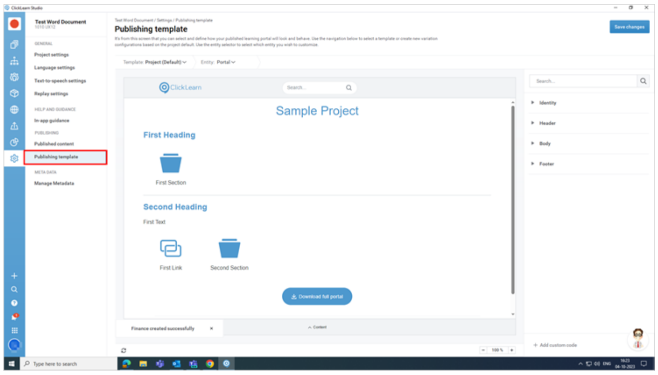
7.7.1. Overview of Publishing Template

7.7.1.1. Introduction

Publishing template: This screen allows you to select and define how your learning portal will look and work after publishing.

You can use the navigation to choose a template or make a new variation configuration based on the default project.

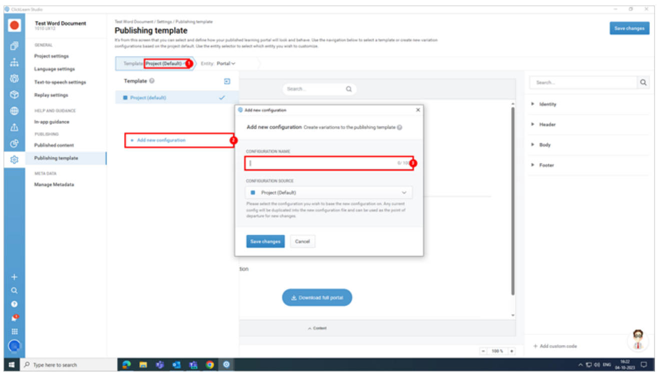
You can also customize an entity by using the entity selector.



7.7.1.1.1. Publishing Template

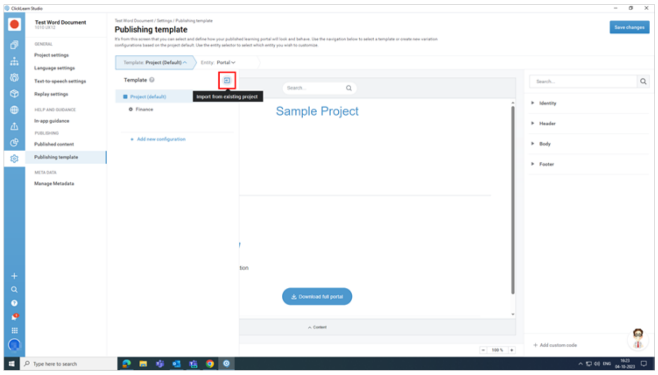
Default Project

1. **Project (Default):** This is the default template of your ClickLearn Attain project.
2. **Add new configuration:** The template is Project (Default). It will create a sub-template for the project (Default). To create a sub-template, click on **Add new configuration**.
3. It opens with a new dialog box, "**Add new configuration**," where you must provide the **Configuration Name** and **Configuration Source**.



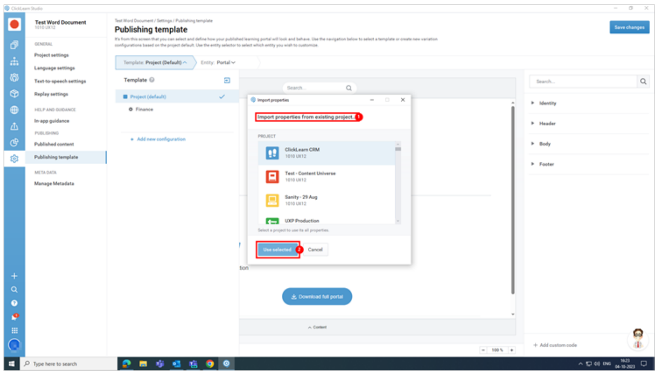
7.7.1.1.2. Import

Click on the icon **Import from existing project**. This allows you to import a template from an existing project.

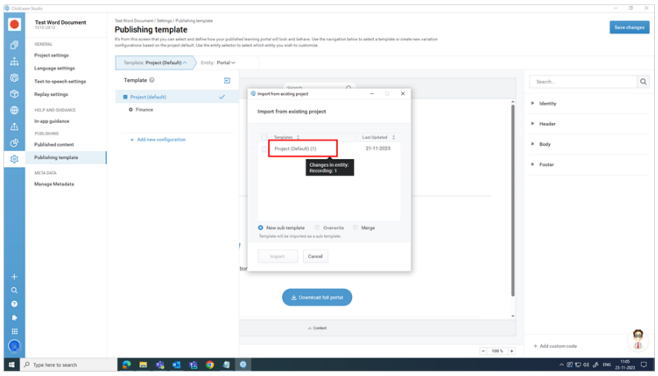


Import Properties

1. This pops up with a new window: **Import properties from existing project**.
2. Select the project with the template you want to import and click **"Use selected"** to open a new dialog box.

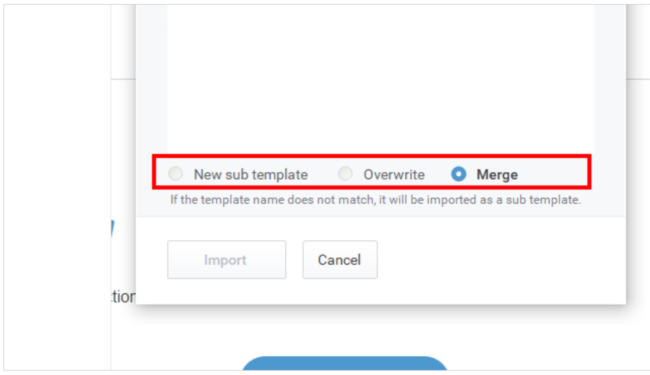


This opens up a new dialog box that allows you to select the templates from that project. Click on the cell **Templates** with the value **Project (Default)**.



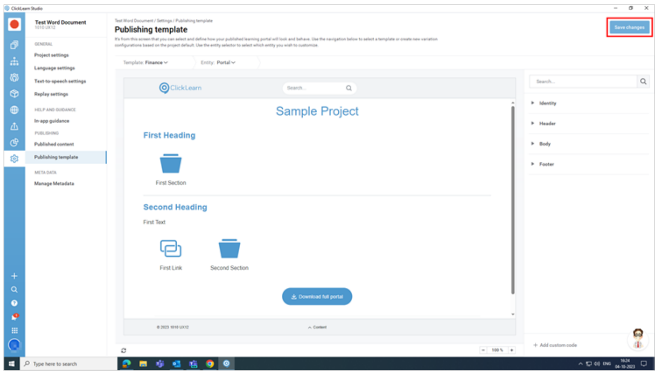
There are three options for how you can import the template.

- **New sub-template:** Template will be imported as a sub-template.
- **Overwrite:** If there are the same names, it will overwrite the existing one.
- **Merge:** It will merge the imported template as a sub-template.



7.7.1.1.3. Save Changes

Save changes: This will save all your changes in the publishing template.



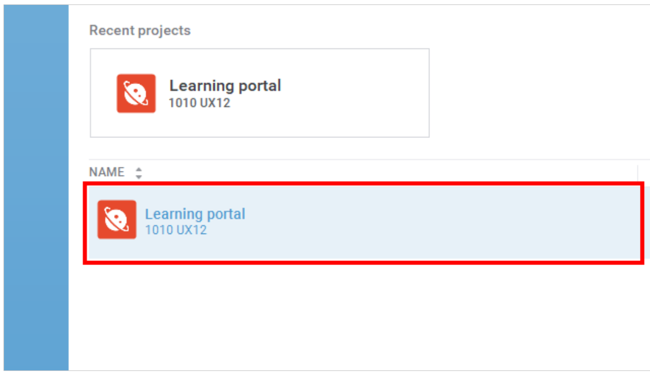
7.7.2. Use brand font on entire learning portal

7.7.2.1. Introduction

To use your preferred font throughout the entire learning portal, please follow the procedure outlined below.

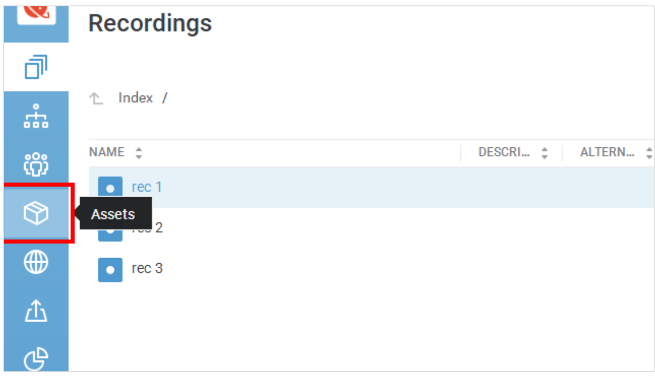
7.7.2.2. Procedure

Open the project for which you wish to apply your brand font.

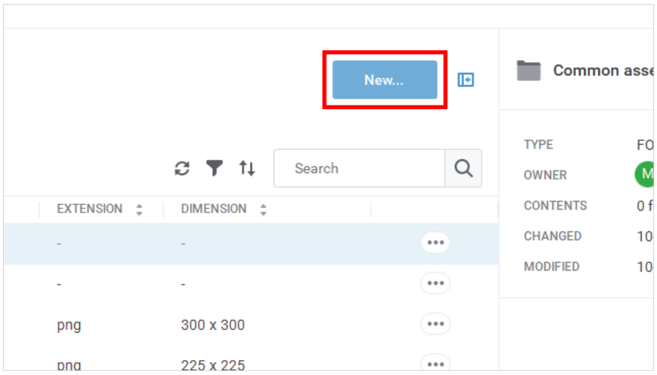


7.7.2.2.1. Create a folder by name 'redist' in assets to add font file there

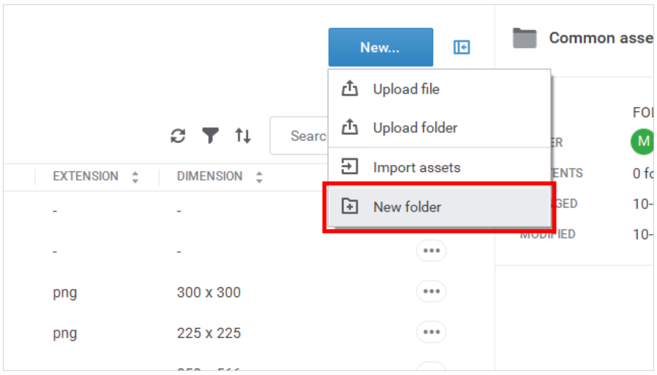
Click on the button **Assets**



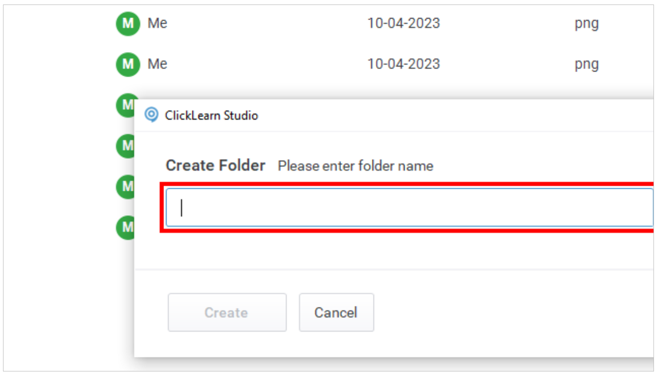
Click on the button **New...**



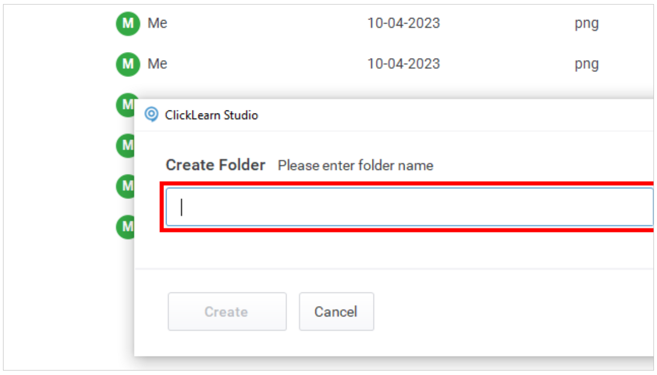
Click on the menu item **New folder**



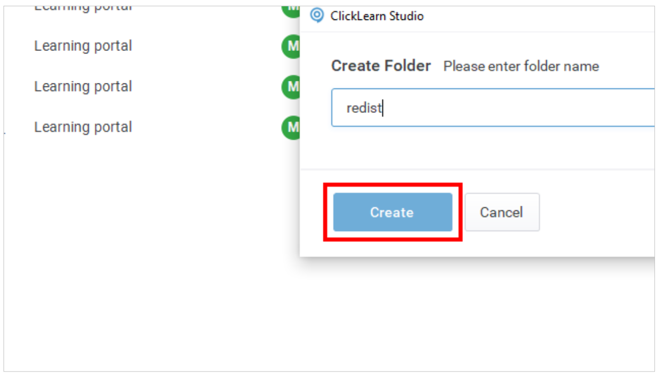
Click on the textbox **Name**



Enter **Name**.

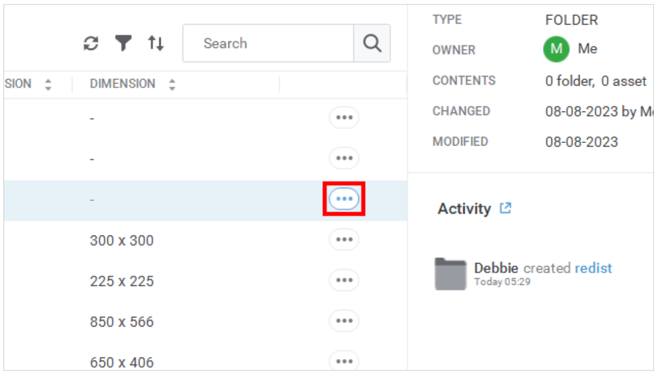


Click on the button **Create**

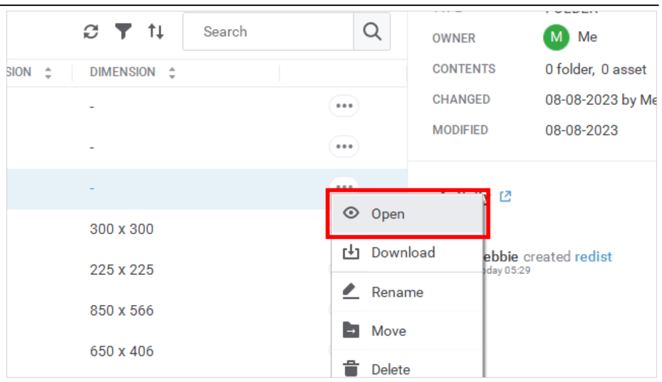


7.7.2.2.1.1. Add font file in redist folder

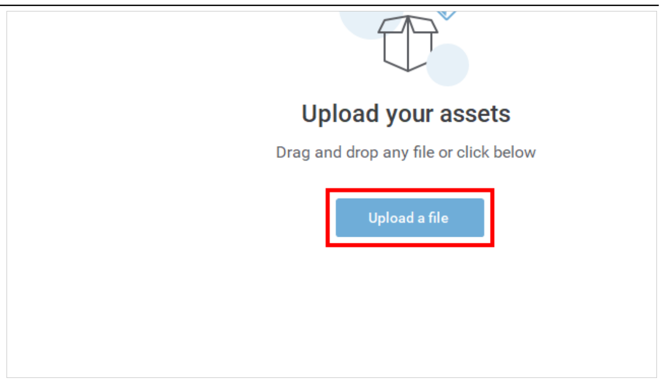
Click on the button **More** of grid cell **Action**



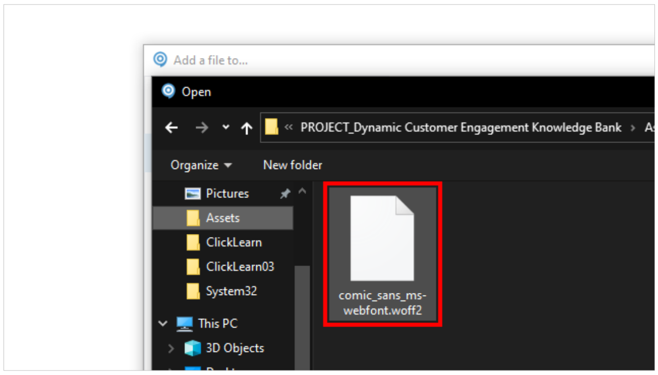
Click on the menu item **Open**



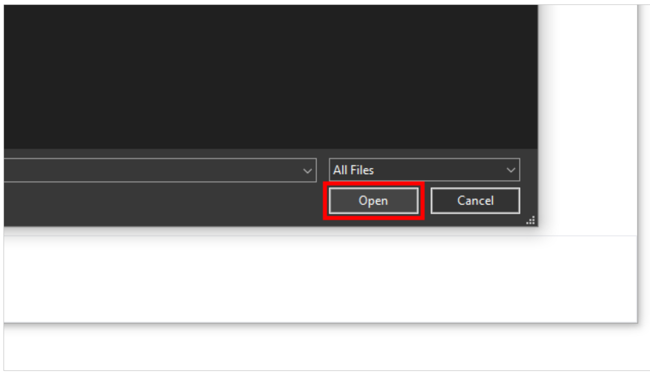
Click on the button **Upload a file**



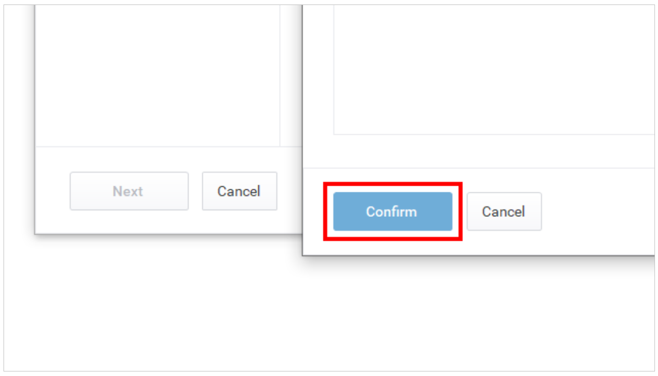
Click on the list element **comic_sans_ms-webfont.woff2**.
In your case it would be your brand font.



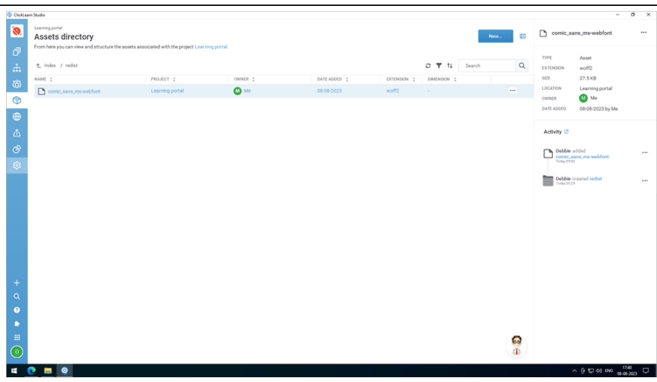
Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **Confirm**



Redist folder should look like this



7.7.2.2.2. Custom CSS

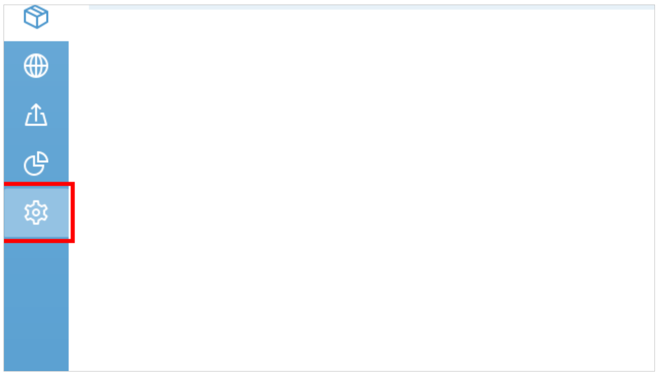
7.7.2.2.2.1. Format css

Below is the css code that you need to add. But before that, you need to paste this in a notepad and edit the font name ie replace the highlighted text to the font that you have added in the redist folder and update the format too.

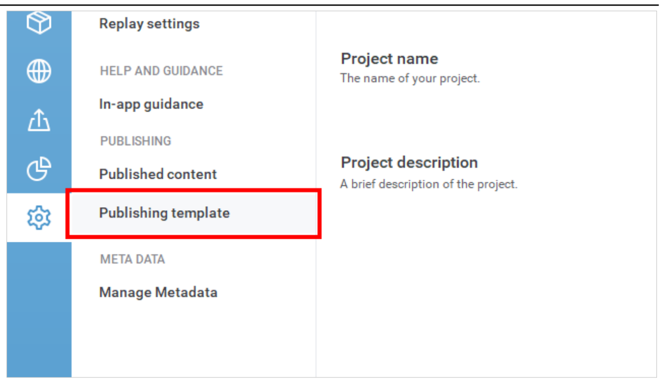
```
@font-face {  font-family: 'MyWebFont';  src: url('comic_sans_ms-webfont.woff2') format('woff2');}
body,
button,
input,
optgroup,
select,
textarea,
.cljsvNoteText,
.cljsvIntroTitleText,
.cljsvIntroDescText,
.cljsvChapterText
{
    font-family:MyWebFont,sans-serif;
}
```

7.7.2.2.2.2. Add custom css

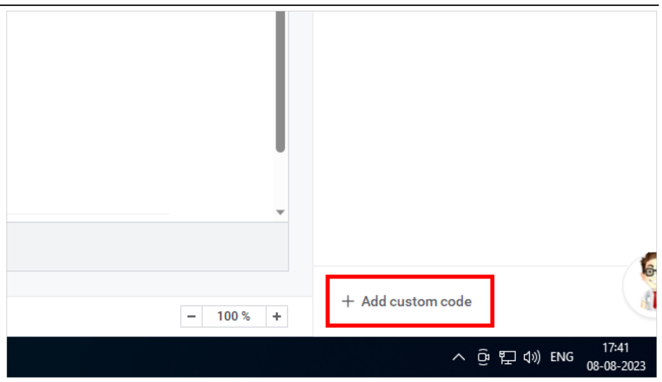
Click on the button **Settings**



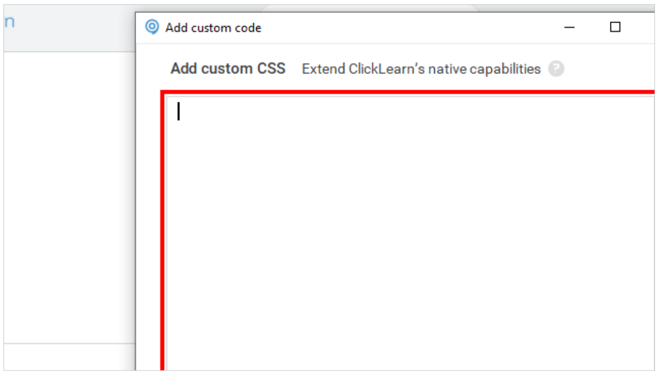
Click on the button **Publishing template**



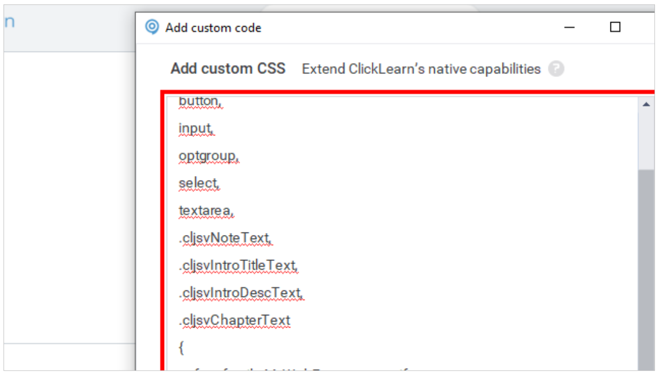
Click on the button **Add custom code**



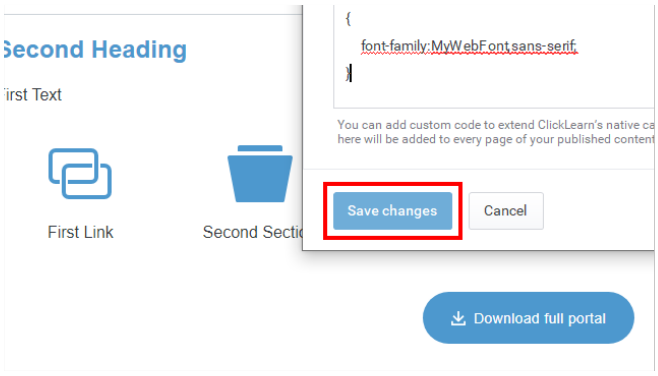
Click on the text editor



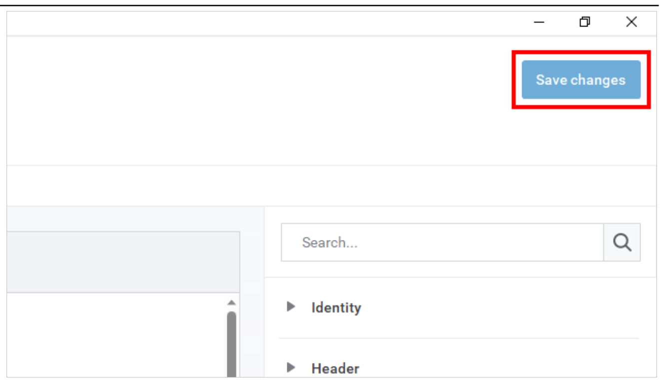
Enter the attached css code.



Click on the button **Save changes**



Click on the button **Save changes**



7.7.2.3. PS

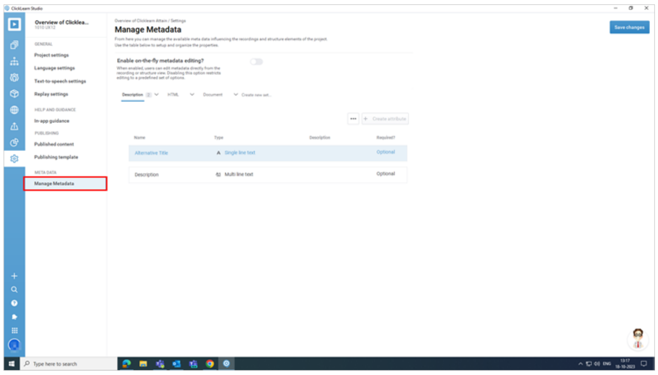
Produce and publish your content to see the changes.

7.8. Overview of Manage Metadata

7.8.1. Introduction

Manage Metadata: This screen allows you to manage the available Metadata influencing the recordings and structure elements of the project.

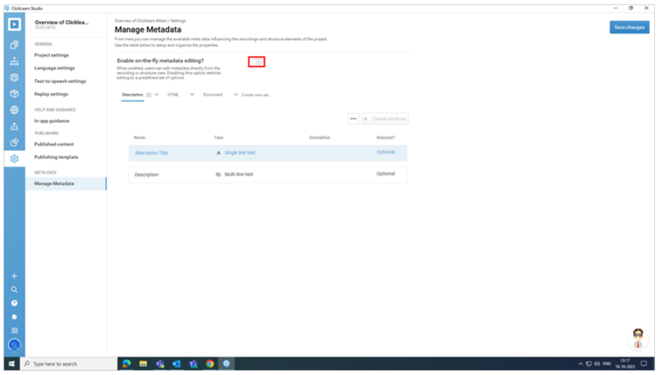
From here, you can set up and organize the properties.



7.8.1.1. Enable on-the-fly metadata editing?

Click on the toggle switch: **Allow User Edit Properties**.

When you enable this option, users can edit Metadata directly from the recording or structure view. This option allows the user to view and add options in the drop-down if this is enabled. For example, if there are four options in the drop-down, and the user needs to add one more option, it is possible if you have enabled this.

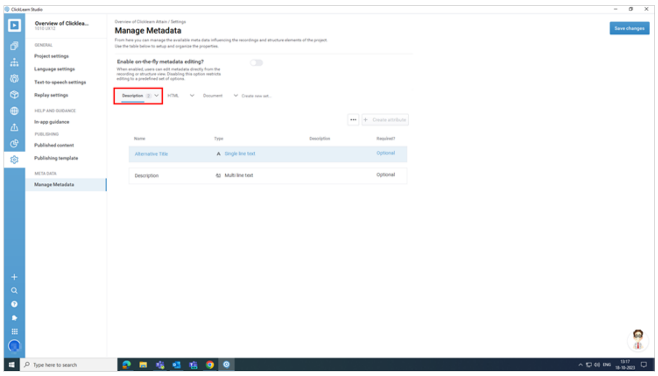


7.8.1.2. Pre-made sets

7.8.1.2.1. Description

Description: Description offers you two options: **Alternative Title** and **Description**.

If your recording name is longer than 32 characters, you can use an alternative title to give a shorter summary of your project. The alternative title can have up to 72 characters, while the description can have up to 250. Description is where you can provide more details about your recording.

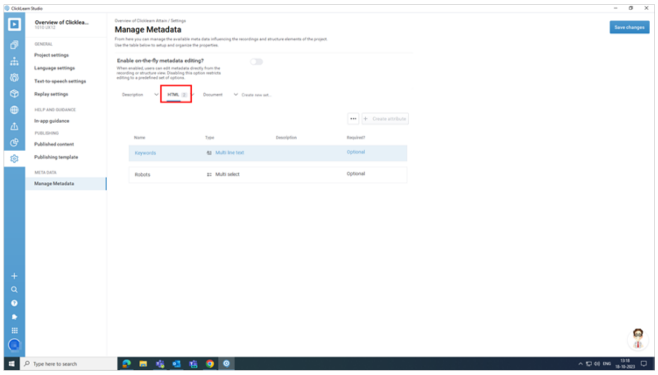


7.8.1.2.2. HTML

HTML: HTML offers you two options: Keywords and Robots.

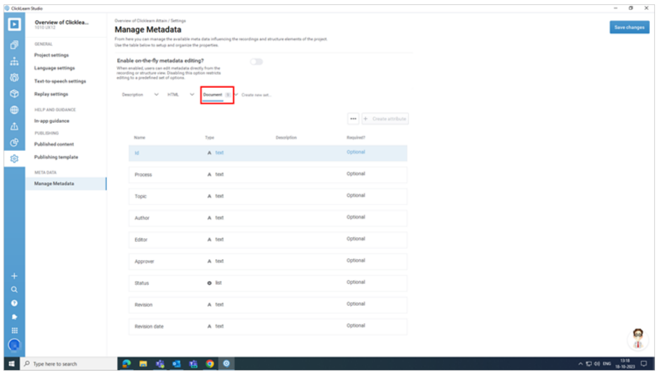
Keywords: You can customize your project by adding keywords depending on your use case.

Robots: The robots are crawlers that provide instructions to search engines.



7.8.1.2.3. Document

Document: The document lets you include various options in your recordings. The options are listed below.



Id: The unique identifier for the recording.

Process: The description or the name of the process that the recording covers.

Topic: The name that summarizes the recording and tells users what the project is about.

Author: The user who created the recording.

Editor: The user who has permission to edit the recording.

Approver: The user who approves the recording.

Status: The current stage of the recording in the workflow. It can be one of the following values.
0 Obsolete: The recording is no longer relevant or valid.

1 Draft: You have a draft ready for the recording.

2 Final: The recording is in the final stage and ready for approval.

3 Sent for approval: The user sends the recording for approval.

4 Approved by business: The recording is approved by the approver and ready for documentation management.

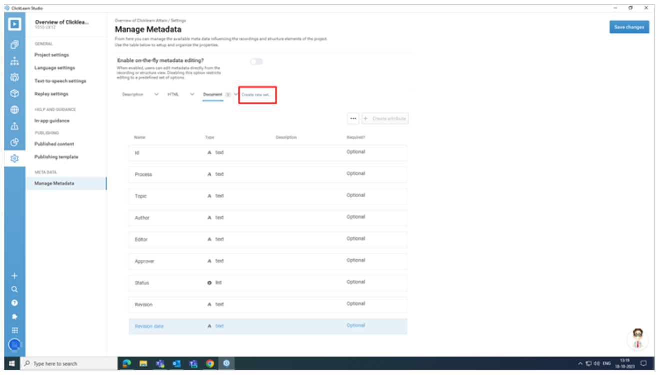
Moved to doc. man: The user can send the recording to the documentation system.

Revision: This summarizes the number of edits made to the recording.

Revision Date: This displays the revision date.

7.8.1.2.4. Create new set

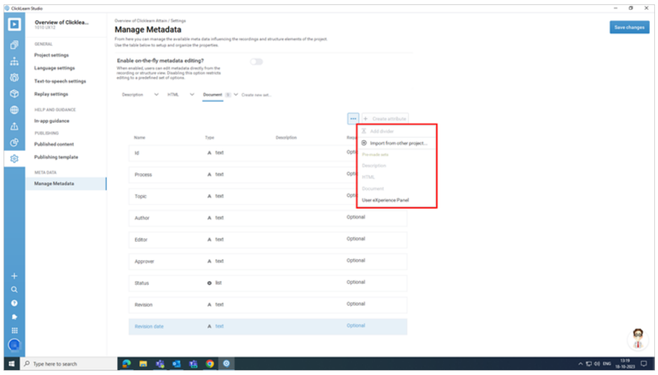
Create new set: This helps you create a new metadata section. When users address the Metadata, this will add your properties to a new tab.



7.8.1.2.5. More

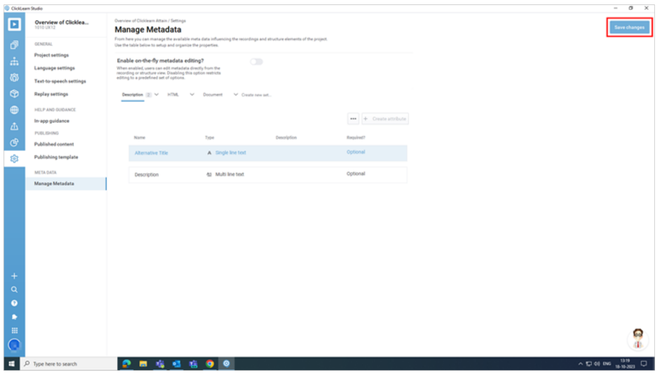
Metadata more: The options associated with more menu are as follows:

- Add Divider
- Import from other project
- Pre-made sets
- Description
- HTML
- Document
- User Experience Panel: (This option is only visible if you have UXP enabled in your project.)



7.8.1.3. Save Changes

Save changes: This will save all your changes in Metadata.



8. Installation and Configuration

8.1. Minimum requirements for using attain

8.1.1. Operating system

- Windows 7 or later

PS: It will not work on *Windows 8.0*

8.1.2. Dependent softwares

- **.Net framework 4.8** and above.
- **Microsoft Edge** should be installed on your machine.

8.1.3. Hardware

- Minimum recommended **10GB HDD**
- Minimum **dual-core** CPU but recommended **4-core** CPU
- Mouse and a keyboard for input.

8.1.4. RAM Requirement

The minimum RAM requirement is **16 GB**.

8.1.5. Network

Please make sure to whitelist the below URLs from your firewall.

PS:
- Based on your application-hosted region, you should whitelist the URLs specific to that region.
- Replace [ORG NAME] with the organization name.

8.1.5.1. EU

https://[ORG NAME].portal.eu.clicklearn.com
https://[ORG NAME].portalapi.eu.clicklearn.com
https://[ORG NAME].content.eu.clicklearn.com
https://uploadv8-westec.clicklearn.com
https://portalapi.clicklearn.com
https://portal.clicklearn.com
https://apps.clicklearn.com
https://lookup.stampregistry.clicklearn.com
https://upload.clicklearn.com

8.1.5.2. US

https://[ORG NAME].portal.us.clicklearn.com
https://[ORG NAME].portalapi.us.clicklearn.com
https://[ORG NAME].content.us.clicklearn.com
https://uploadv8-ncenus.clicklearn.com
https://portalapi.clicklearn.com
https://portal.clicklearn.com
https://apps.clicklearn.com
https://lookup.stampregistry.clicklearn.com
https://upload.clicklearn.com

8.1.5.3. AU

https://[ORG NAME].portal.au.clicklearn.com
https://[ORG NAME].portalapi.au.clicklearn.com
https://[ORG NAME].content.au.clicklearn.com
https://uploadv8-aueast.clicklearn.com
https://portalapi.clicklearn.com
https://portal.clicklearn.com
https://apps.clicklearn.com
https://lookup.stampregistry.clicklearn.com
https://upload.clicklearn.com

8.1.5.4. CA

https://[ORG NAME].portal.ca.clicklearn.com

https://[ORG NAME].portalapi.ca.clicklearn.com
https://[ORG NAME].content.ca.clicklearn.com
https://uploadv8-ceca.clicklearn.com/
https://portalapi.clicklearn.com
https://portal.clicklearn.com
https://apps.clicklearn.com
https://lookup.stampregistry.clicklearn.com
https://upload.clicklearn.com

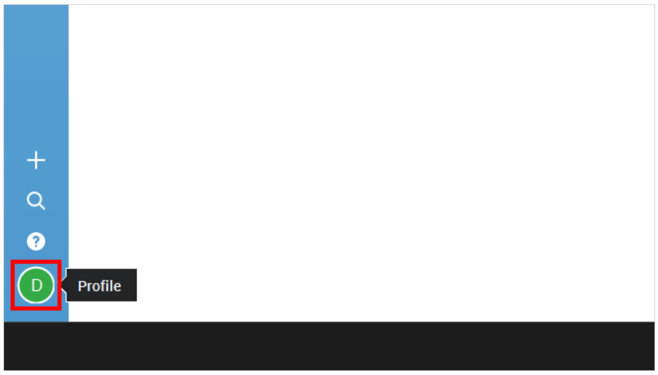
8.2. Install the latest Attain Studio (MSI)

8.2.1. Introduction

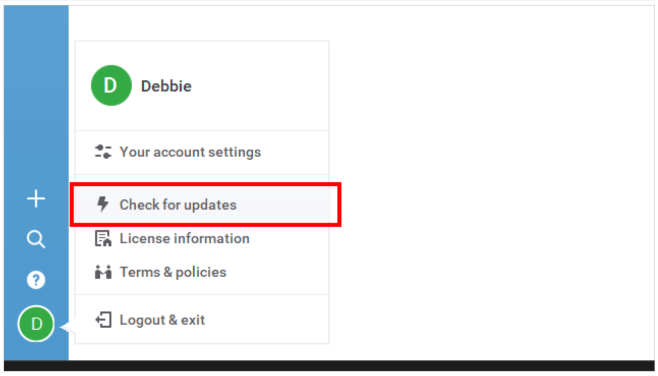
ClickLearn studio can be accessed using click once installation and MSI package. Click-once version will update to the latest version automatically when it's available, but in the case of MSI, you should first check for the latest updates, download the latest package from the portal, uninstall the existing studio and install the latest one.

8.2.2. Check for updates

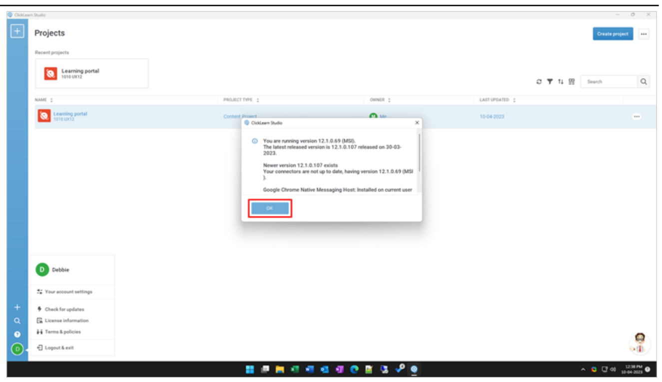
In attain studio, Click on the **profile avatar**



Click on the label **Check for updates**



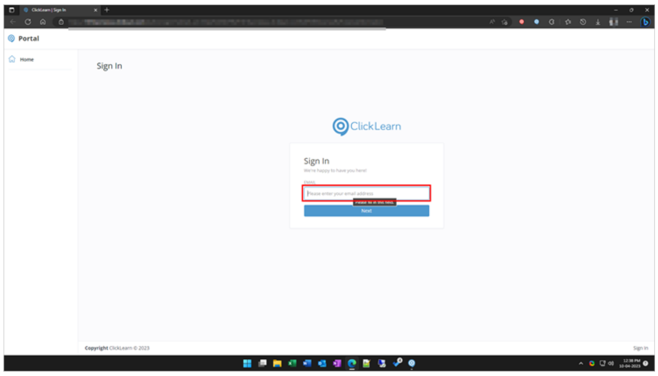
A dialogue which lets you know the current version of studio and new version if any, will pop up.
Click on the button **OK**



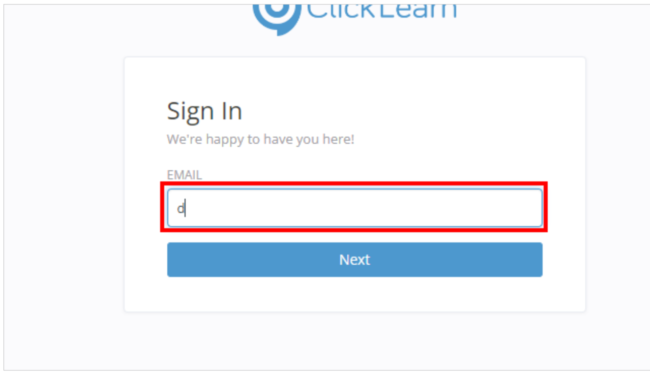
8.2.3. Download MSI package

8.2.3.1. Login to portal

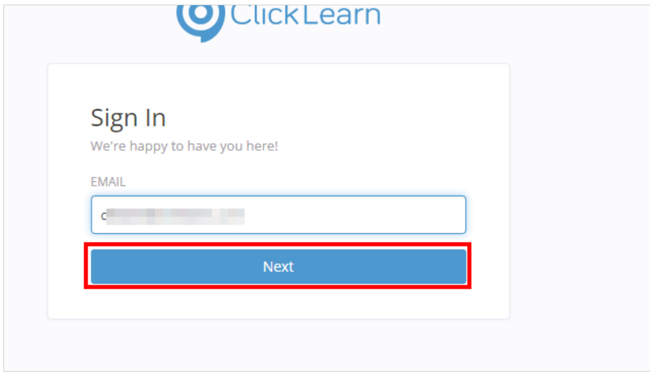
Navigate to your ClickLearn portal.
Click on the input field **Please enter your email address**



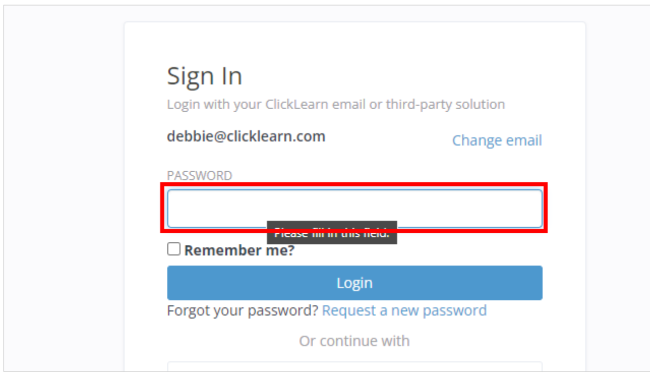
Enter your e-mail address.



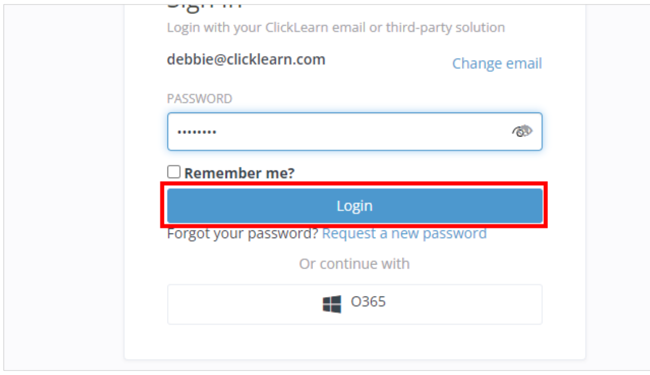
Click on the button **Next**



Click on the password field and enter your password.

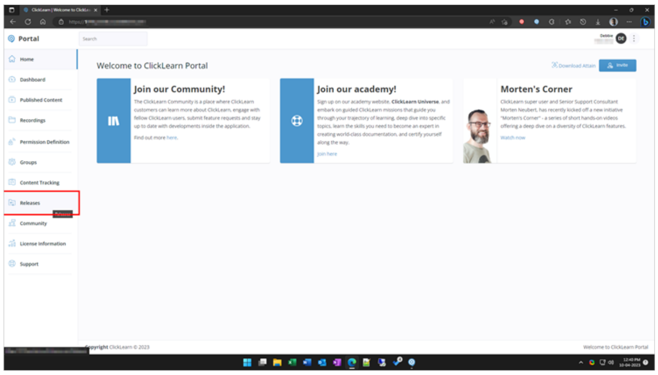


Click on the button **Login**

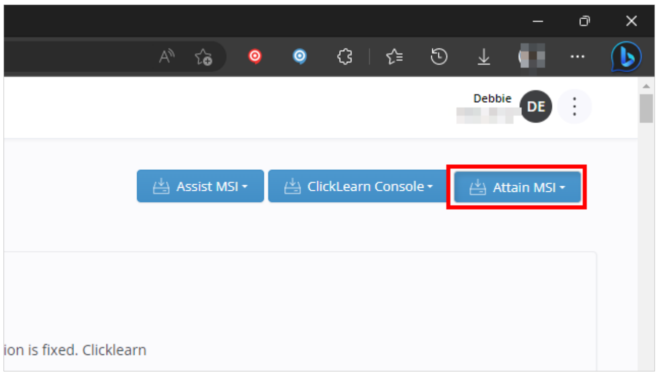


8.2.3.2. Download MSI

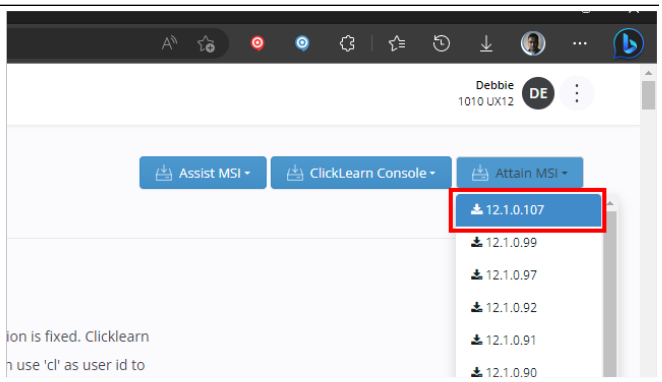
Click on the link **Releases**



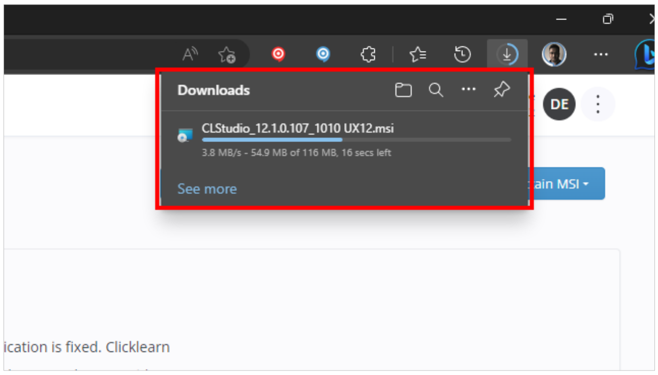
Click on the button **Attain MSI**



Select the version for which you wish to download the MSI.
In this case the latest version of attain is **12.1.0.107.**
Click on the link **12.1.0.107**

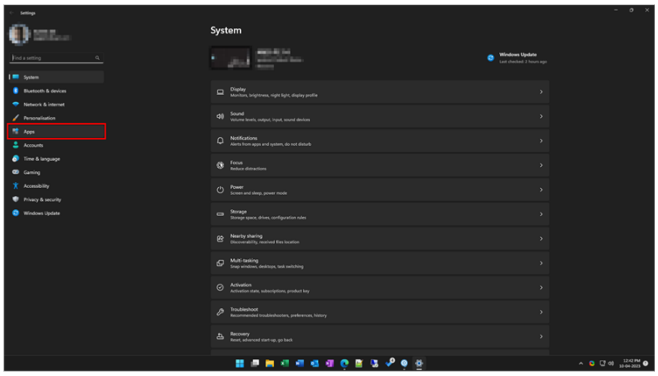


After clicking the link, download should start immediately, else if the package is not prepared, system would prepare a package and notify you and you can download from the notifications in portal.

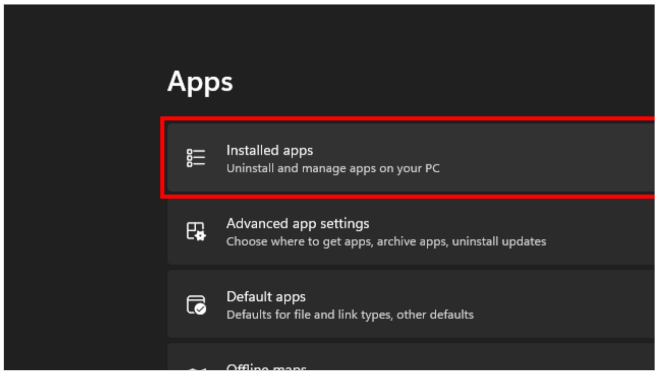


8.2.4. Uninstall old version of ClickLearn studio

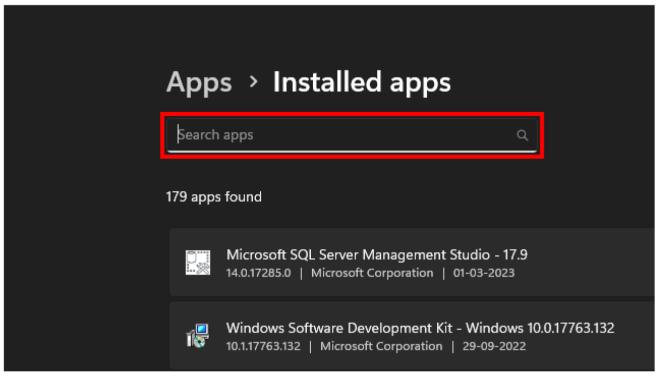
This is the procedure for Windows 11 and the same should apply for Windows 10 as well.
Navigate to **Settings**
Click on the list element **Apps**.



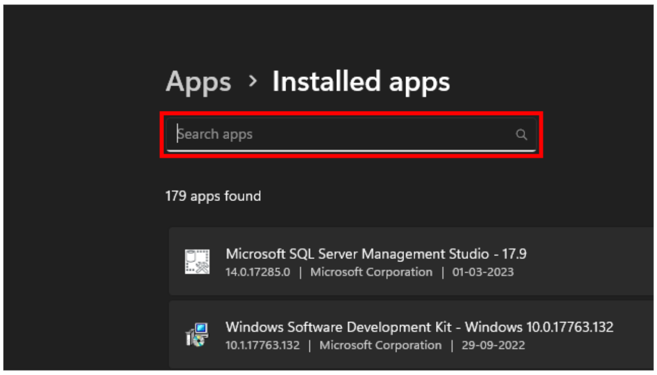
Click on the group **Installed apps**.



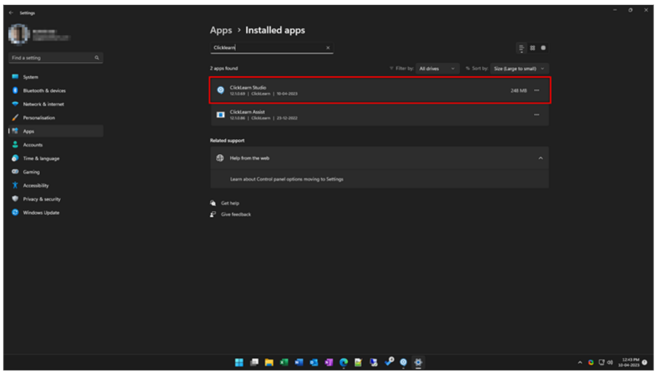
Click on Click on Search.



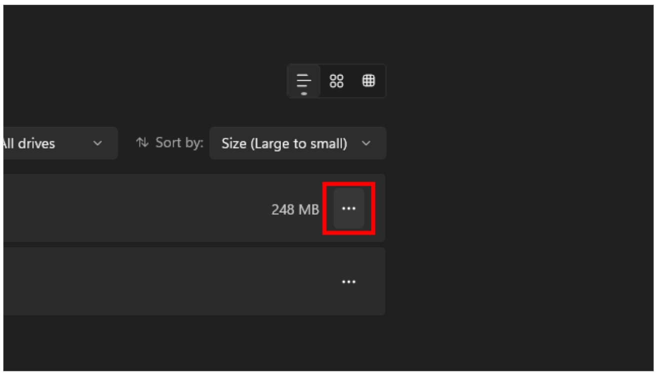
Enter **Search**.



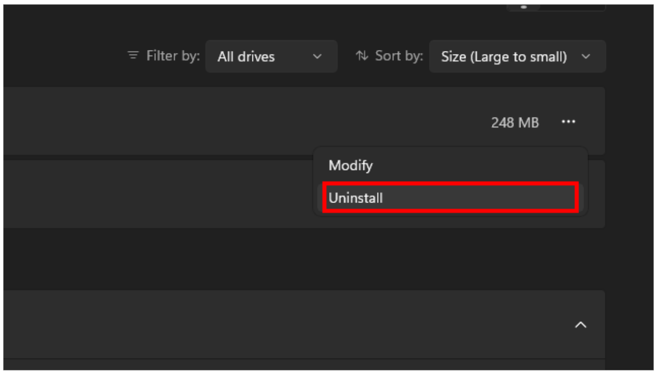
Here you can see the version of studio that should be uninstalled before installing the latest version.



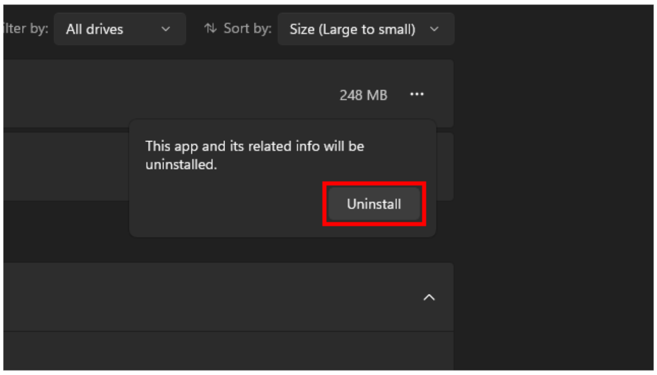
Click on the button **Overflow**.



Click on **Uninstall**.

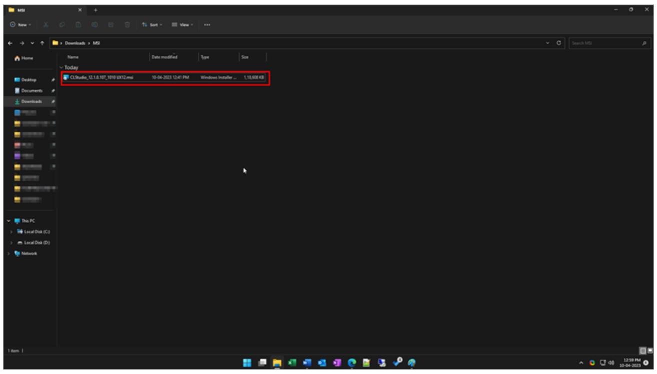


Click on the button **Uninstall**.

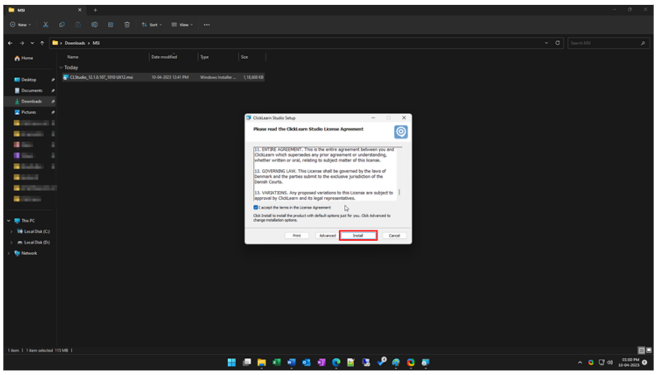


8.2.5. Install the downloaded MSI

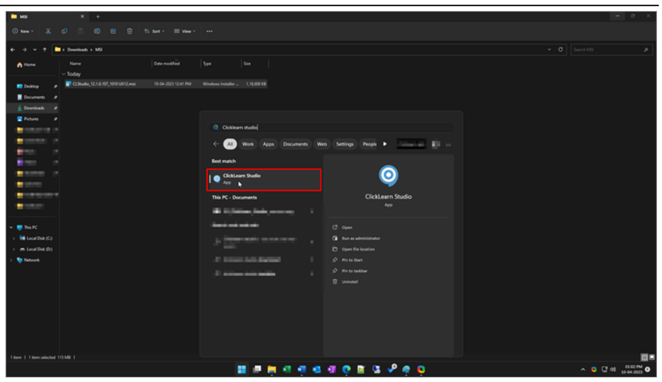
Open windows explorer and navigate to the folder where the latest MSI is present.
Double click on the package to start the installer wizard.



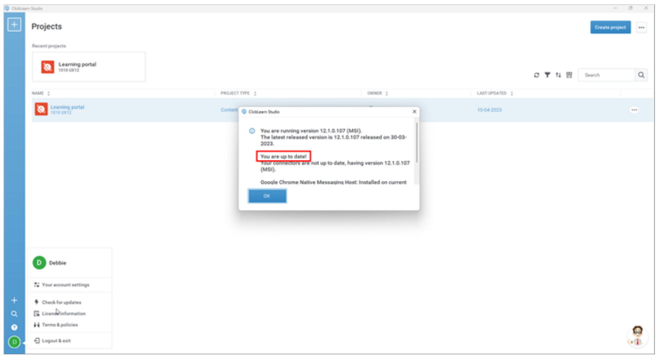
Please go through the terms and accept the license agreement.
Click on the button **Install**



After installation is completed, you can open the studio by searching in Start menu.



Latest version is now installed.



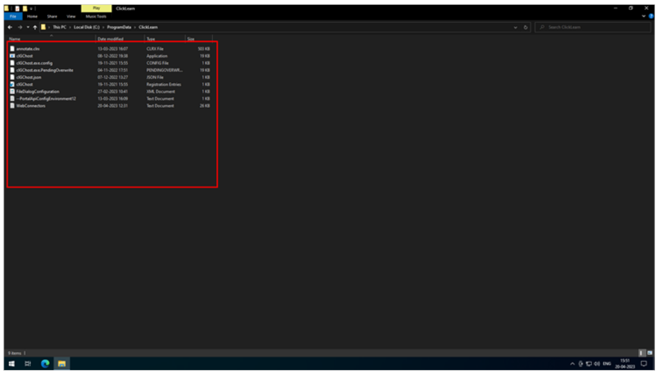
8.3. Web proxy

8.3.1. Introduction

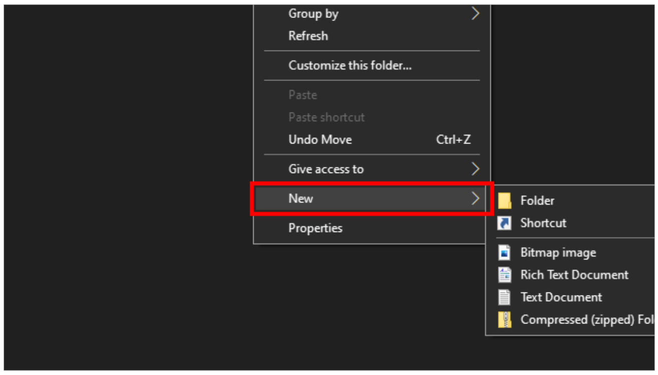
Attain Studio can be accessed through a proxy, and to set up the same, you have to create a file by the name **ClickLearnProxy.txt** in the folder path **C:\ProgramData\ClickLearn**.

8.3.2. Create a proxy file

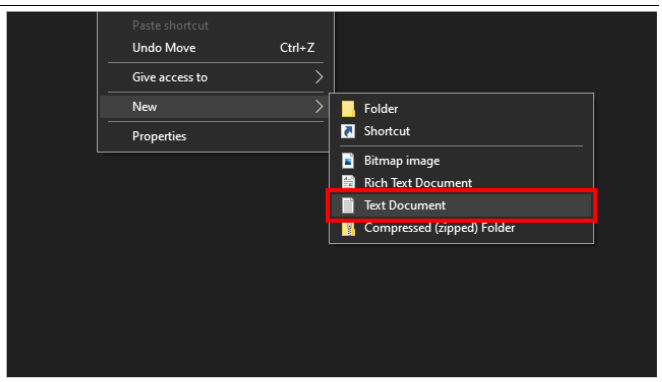
Navigate to folder **C:\ProgramData\ClickLearn**
Right click on the list **.**



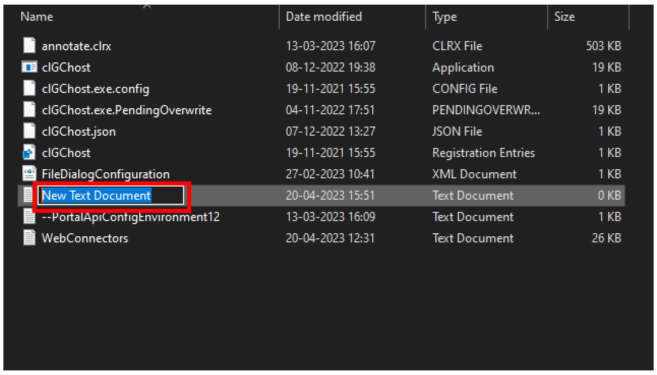
Click on the menu **New**.



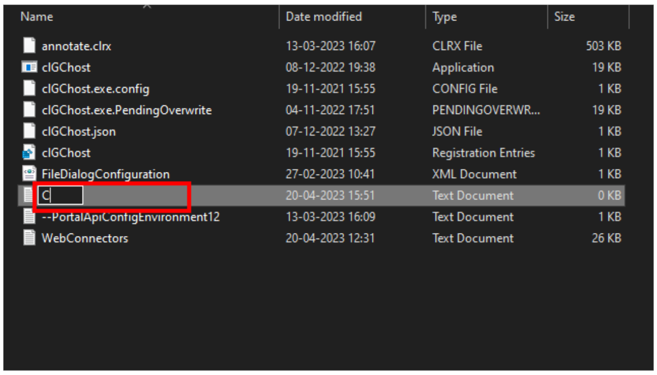
Click on the menu **Text Document**.



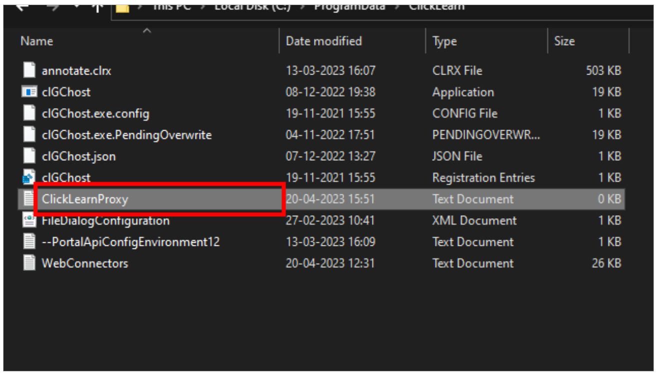
Click on Click on New Text Document.



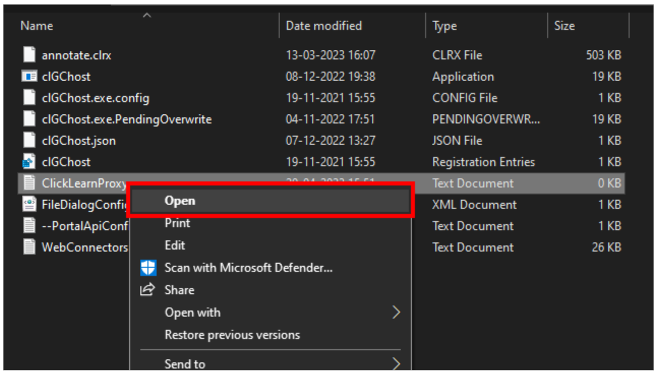
Enter **New Text Document**. Press the **Enter** key.



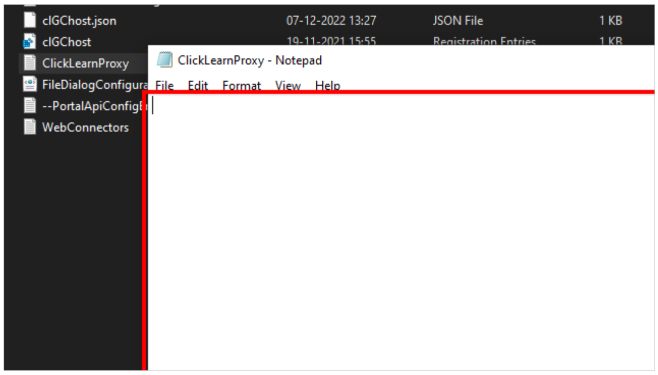
Right click on Click on Name.



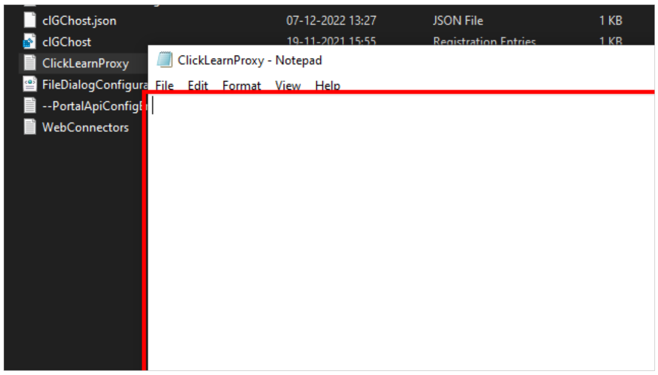
Click on the menu **Open**.



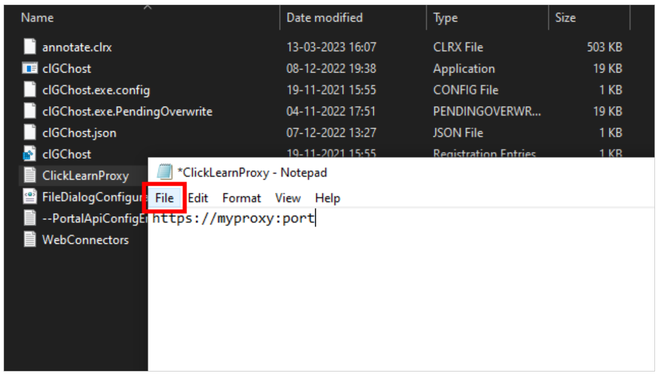
Click on Click on Text Editor.



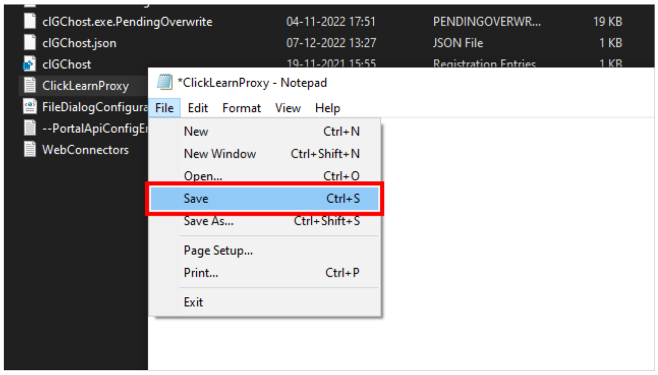
Enter proxy server details



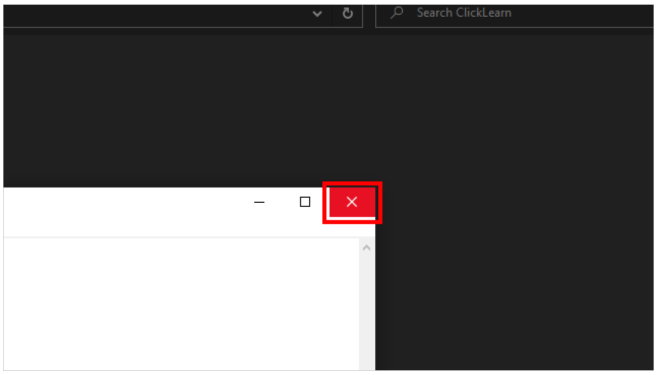
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Save**.
You may also press **Ctrl+S**.



Click on the button **Close**.



8.3.3. Proxy configuration

Check with your local IT regarding the proxy server details; you can configure the text file based on it. Make sure to restart Attain Studio after configuring the proxy.

8.3.3.1. Syntax

{w OR s} OR {http://[PROXY ADDRESS]:[PORT]},{d OR n},[USERNAME],[PASSWORD],[DOMAIN]

Acronyms

- w = Web proxy
- s = System web proxy
- d = Default credentials
- n = Default network credentials

8.3.3.1.1. Examples

For using web proxy with default credentials:
w,d

For using a system web proxy with default network credentials:
s,n

For using a custom proxy with default credentials:
http://myproxy:8080,d

For using a custom proxy with default network credentials:
http://myproxy:8080,n

For using a custom proxy with other credentials:
http://myproxy:8080,,userid,password,domain

8.3.4. Note

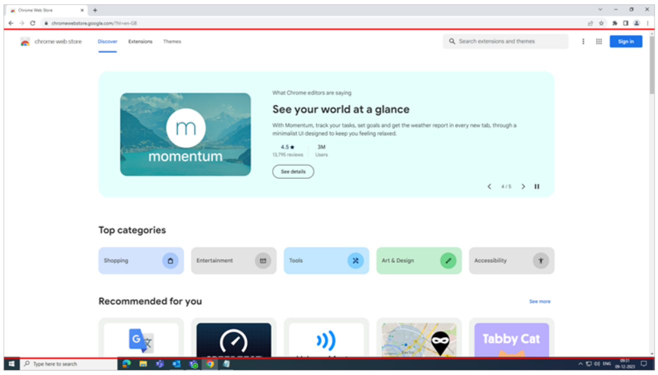
If the line starts with an exclamation [!], then it is running with debug information mode.
In debug mode, whenever a proxy is hit, a dialogue box will appear with proxy details.

8.4. Deploy and Configure UXP

8.4.1. Steps to install ClickLearn UXP Extension

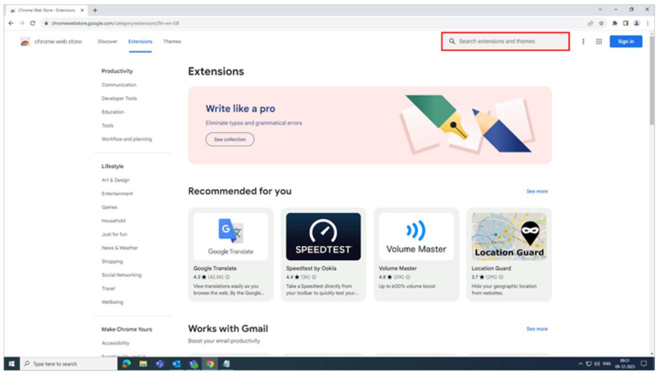
To install the ClickLearn UXP Chrome extension, follow the steps listed below.

- Launch Google Chrome or Microsoft Edge.
- Go to the Chrome web store or Microsoft Edge Add-ons.

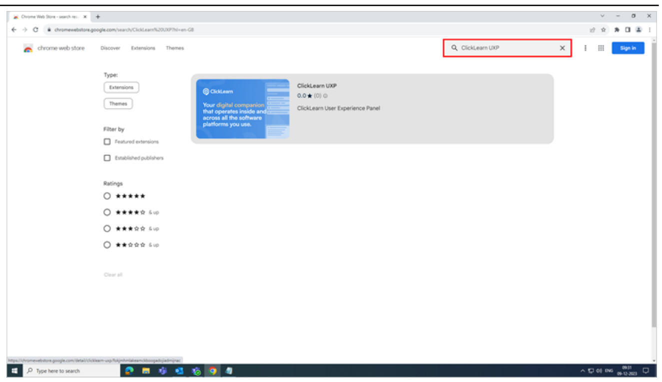


Following are the steps for the Google Chrome browser; you can follow the same steps for Microsoft Edge.

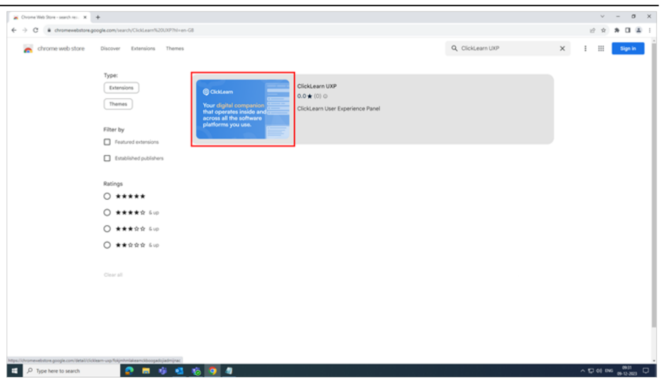
Click on the **search box**.



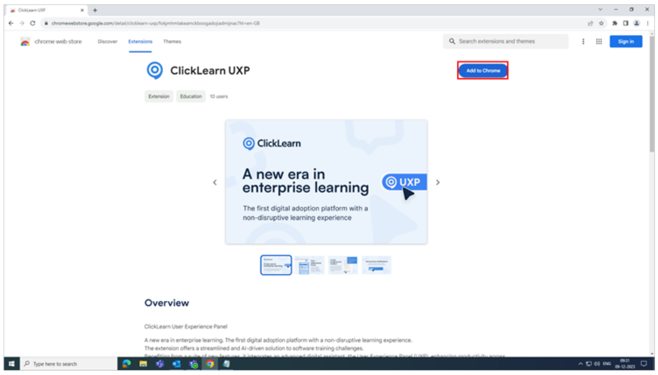
In the search box, type **ClickLearn UXP**.



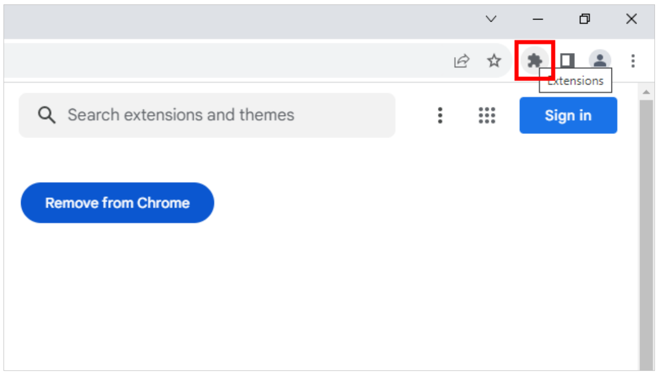
Click on the **UXP**.



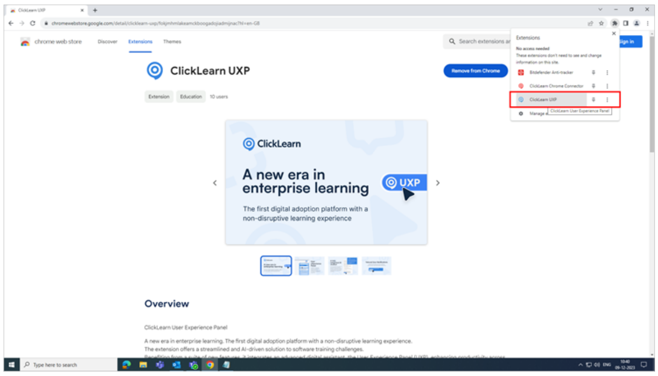
Click on the button **Add to Chrome**.



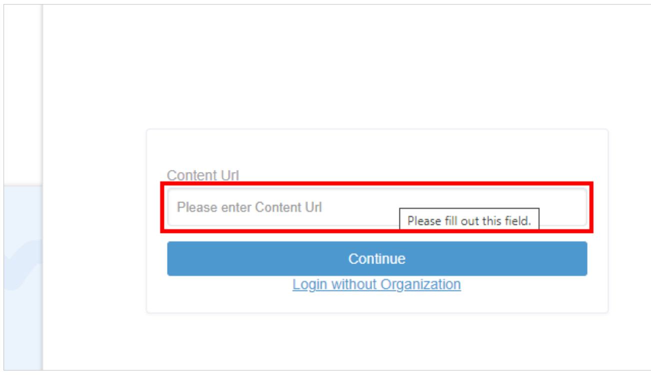
Click on **Extensions.**



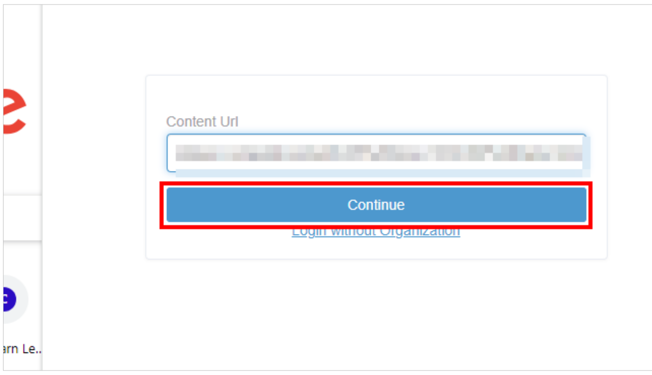
From the extensions, select **ClickLearn UXP**.



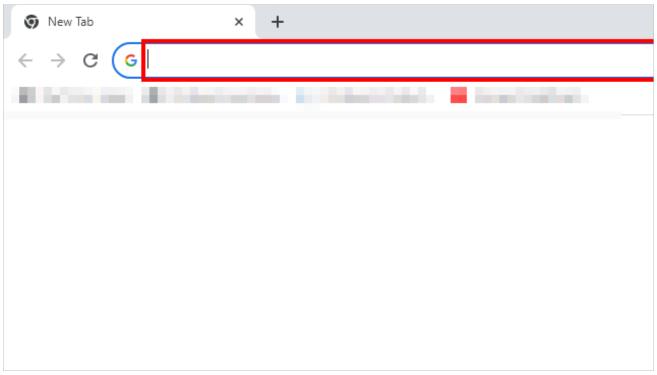
Click on the input field. **Please enter the content URL**.



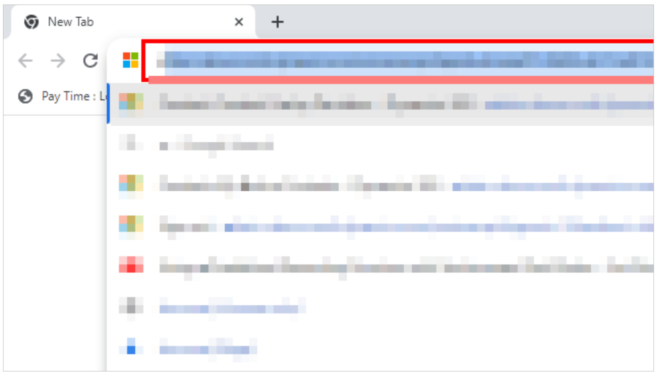
Here, you need to enter the content URL from the publication page. Copy and paste the content URL and click on the button **Continue**.



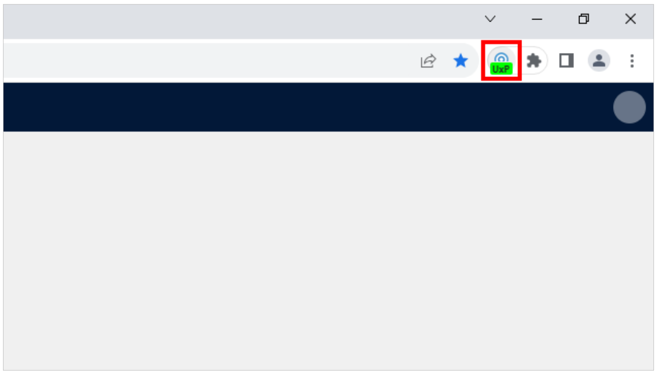
Click on the input field **Address and search bar**.



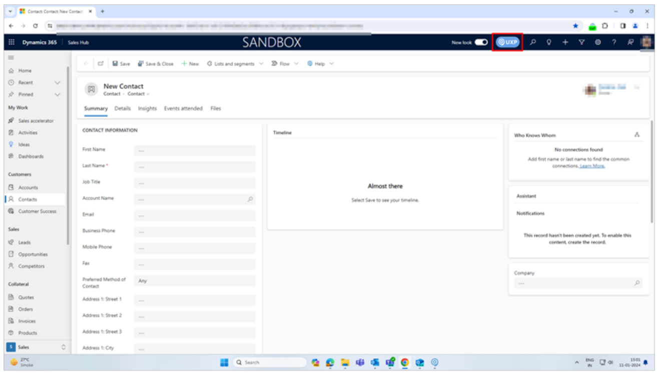
Enter the URL of the application.



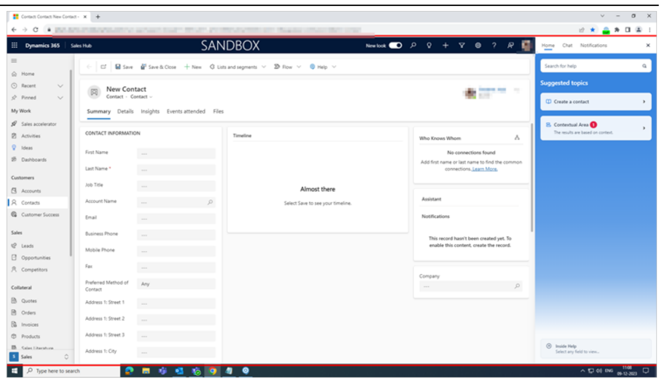
When you enter the application URL, the **UXP** icon changes to green.



Click on the group **UXP.**



The UXP appears next to the application.



8.5. Deploy and Configure UXP for all the end users(Contact local admin)

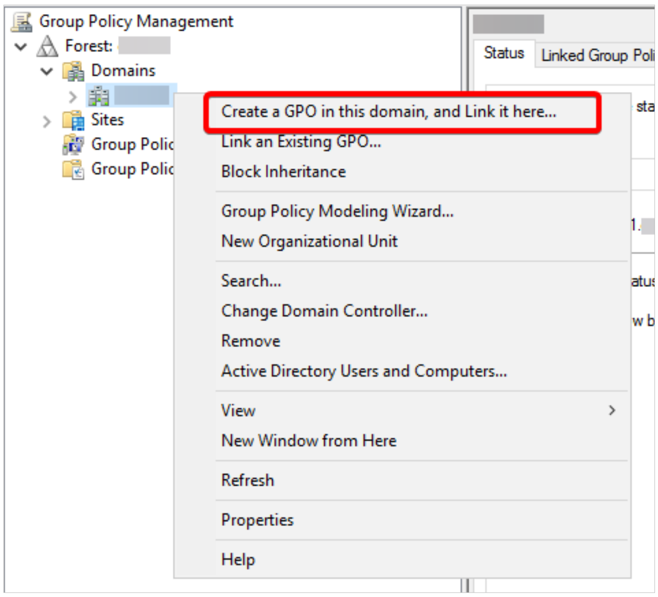
8.5.1. Steps for the mass installation of ClickLearn UXP Extension

Follow these steps to perform a bulk installation of ClickLearn UXP Extension.
Download the below batch file.

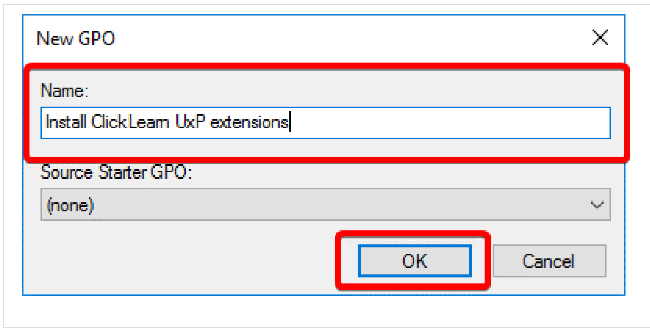
- [ClickLearn UXP Extension]

NOTE: You need to update the content URL manually. To update the content URL, select the batch file you downloaded, right-click on it, and open it in Notepad.
Find the URL, https://abc.com/publiccontent/pqr.htm, and replace it with your URL.

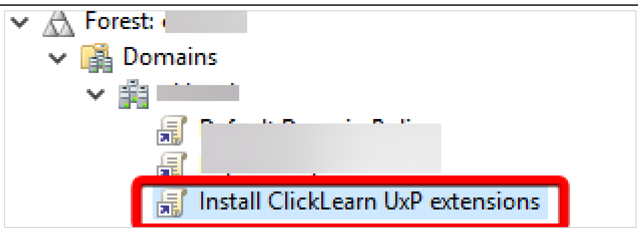
Go to the active directory server. Open the "**Group Policy Management.**" Right-click on your domain directory. Click "**Create a GPO in this domain, and Link it here.**"



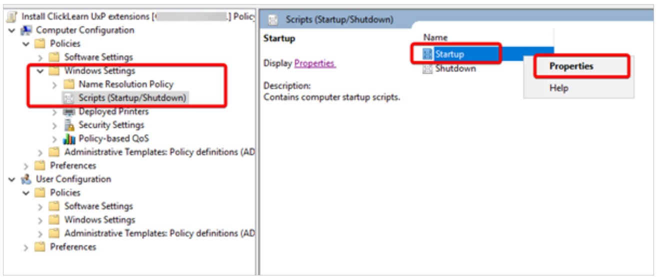
Later, a pop-up appears wherein you must fill in the value as per the given name, "**Install ClickLearn UxP extensions**." Click on the **OK** button.



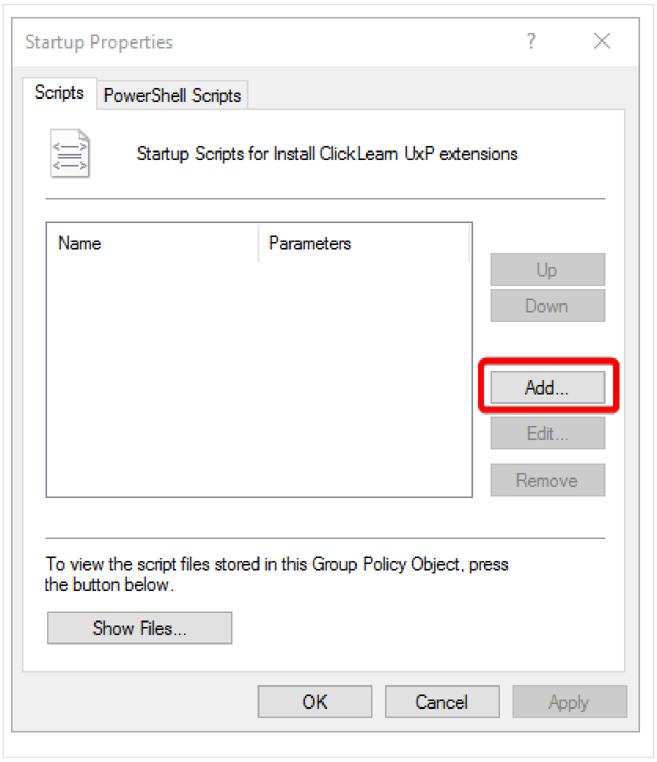
Once you click the OK button, the screen looks something like this.



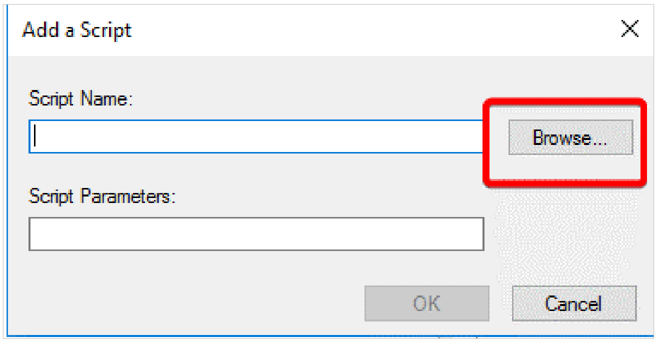
Expand Windows Settings, right-click on the policy, and click Edit. The screen looks something like this.



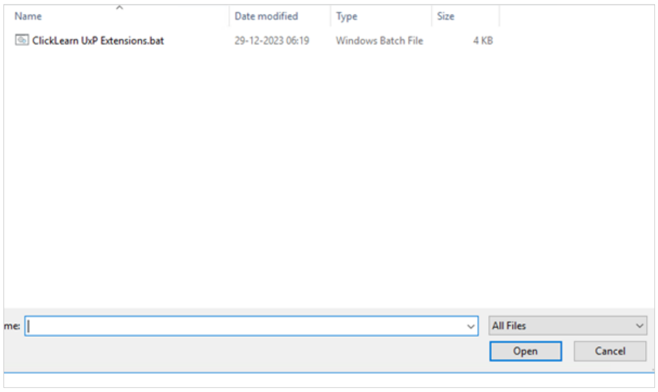
Click on the button **Add**.



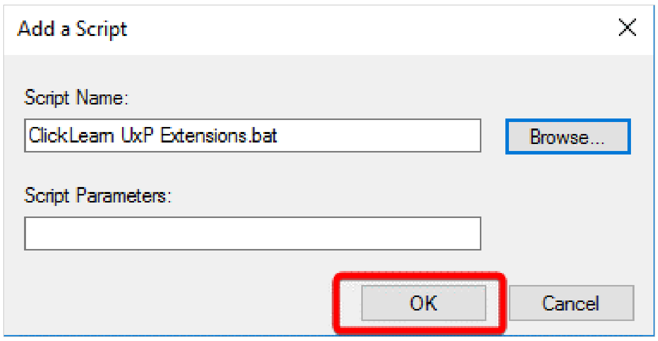
Click on the button **Browse**.



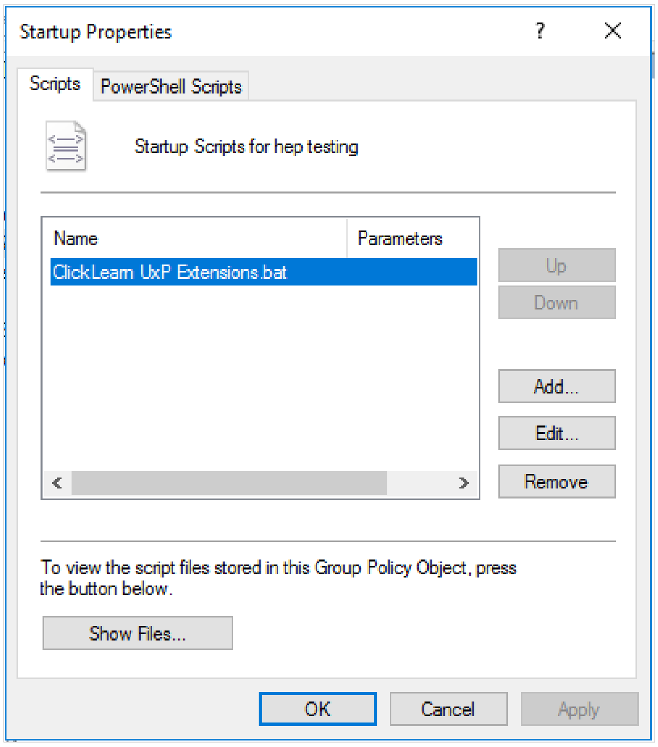
Copy the file you downloaded in the first step and paste it into the folder you opened from the browse option. Choose the file and open it.



Click on the button **OK**.



Click on the button **OK**.



Open the command prompt as an administrator and enter "**gpupdate /force**."

After completing the above steps, you can automatically apply this policy to every domain system.

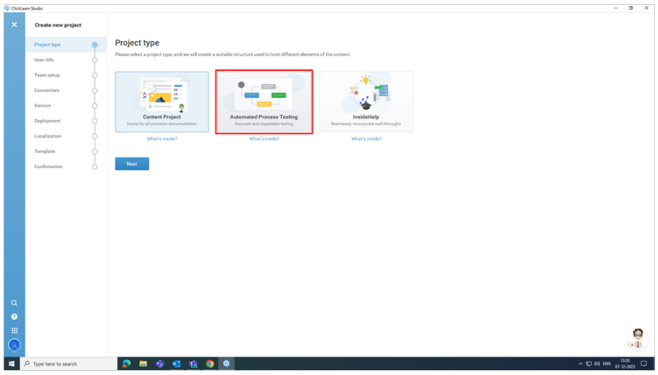
9. Automated Process Testing

9.1. Introduction to APT

9.1.1. Introduction

Automated Process Testing, also called an APT Project, is a project type in ClickLearn Attain that allows you to test a process or a series of processes. APT helps you to test changes to system processes, work instructions, or even a change in the user interface.

NOTE: A thorough knowledge of the replay function is mandatory before using APT.



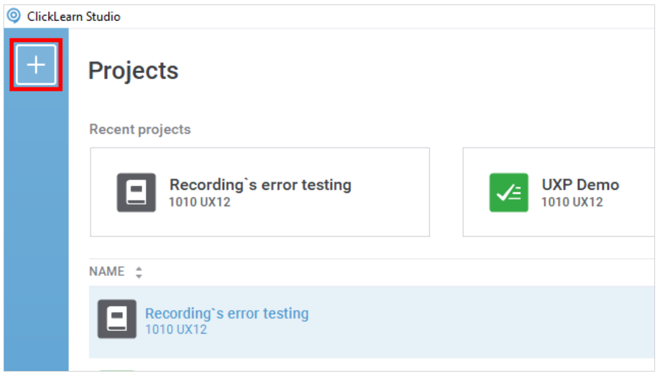
9.1.2. Use of Automated Process Testing

You can use Automated Process Testing in many ways and for different reasons. But there are two main reasons for using Automated Process Testing those are:

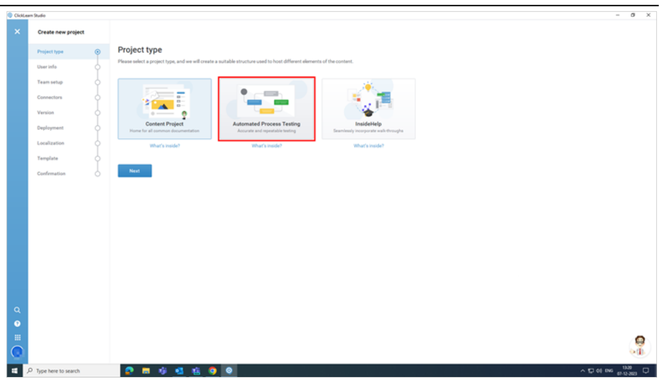
- When you are upgrading or updating your complete business system organization-wide.
- During quality assurance surrounding organizational changes or leading up to a busy season.

9.1.3. Steps to Create an APT Project

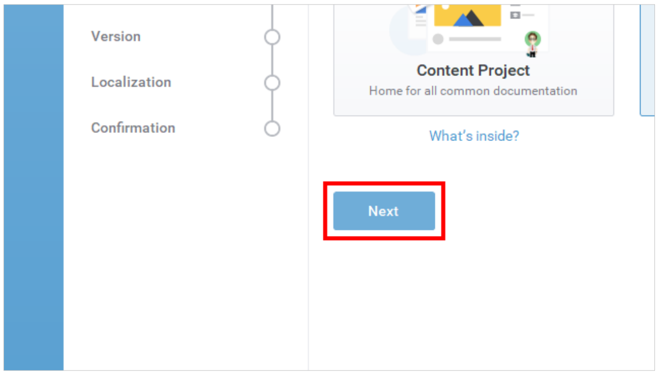
Click on the button **New Project**.



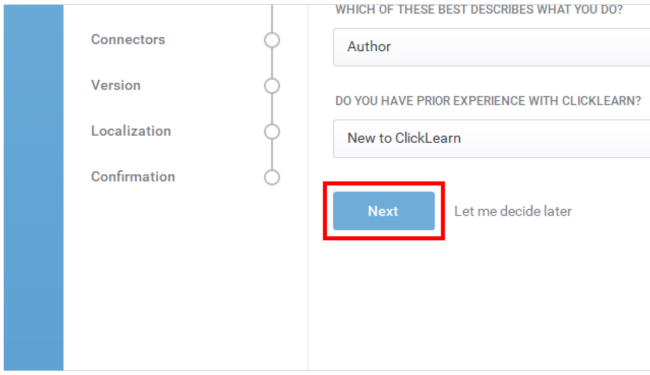
Click on the panel **Automated Process Testing**.



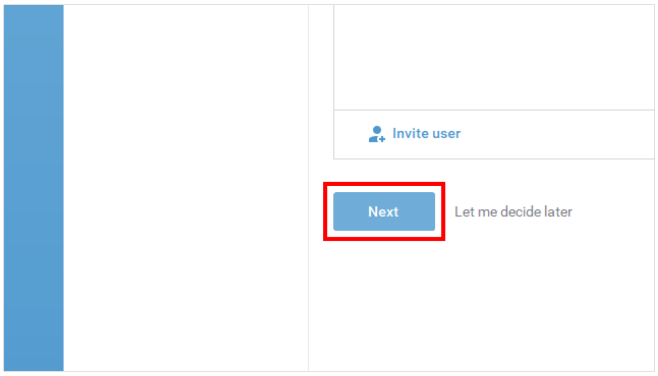
Click on the button **Next**.



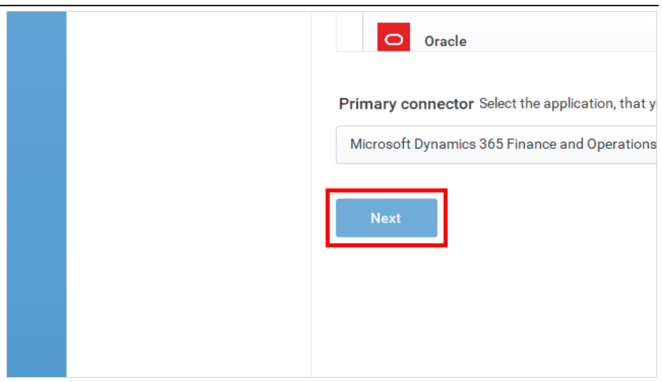
Click on the button **Next**.



Click on the button **Next**.

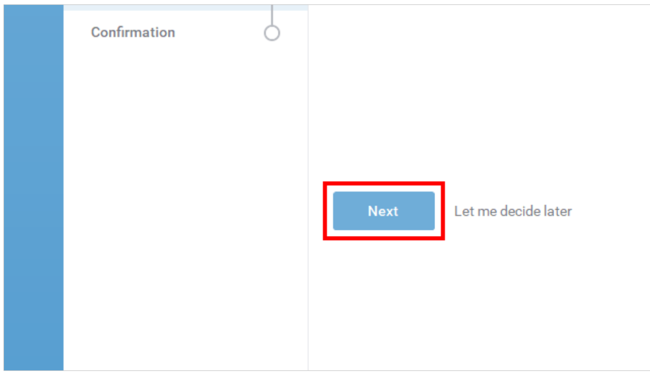


Click on the button **Next**.

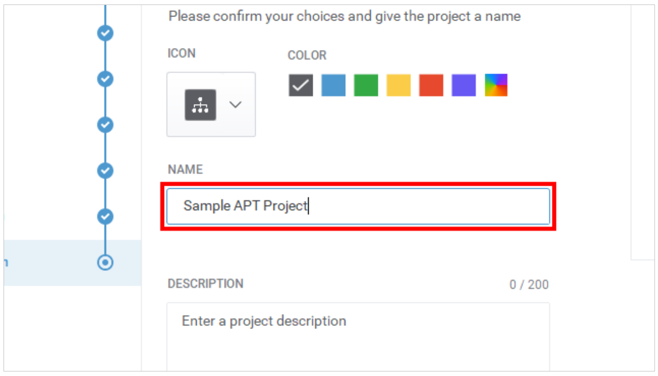


Click on the button **Next**.

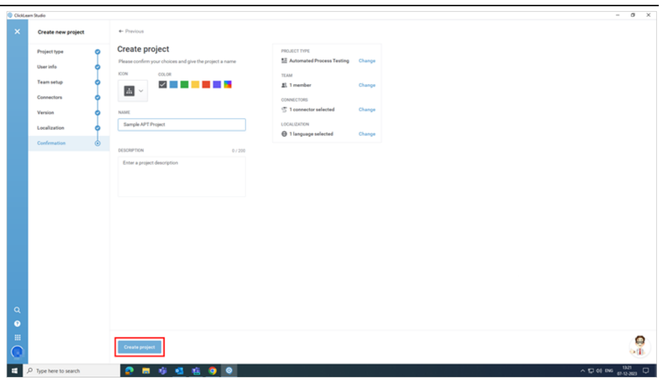
Click on the button **Next**.



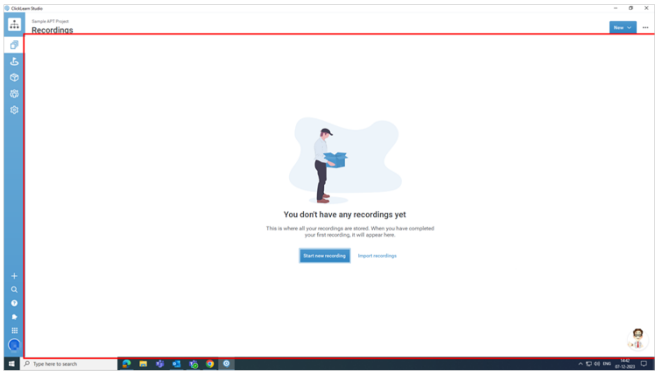
Click on the **textbox** and enter the Project Name.



Click on the button **Create project**.



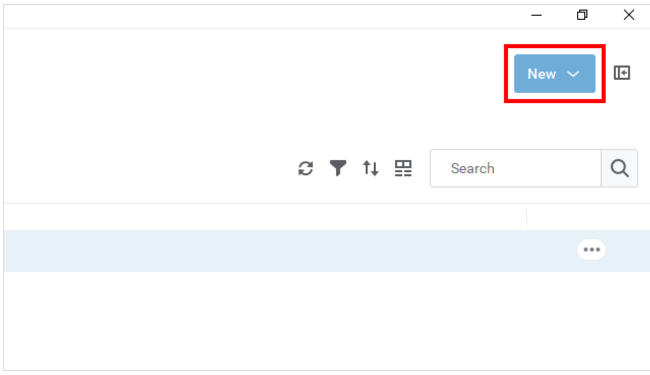
This is what an APT project looks like.



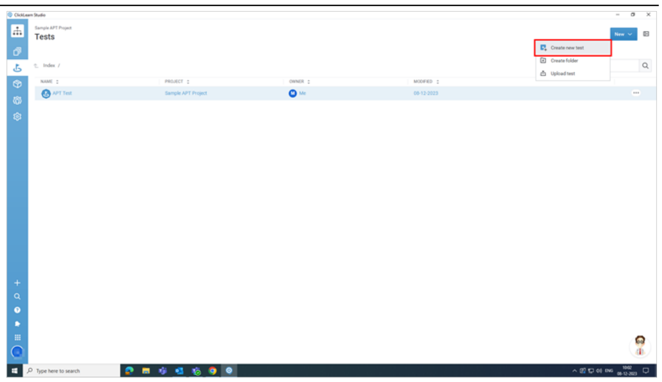
9.2. Context menu of the test

9.2.1. Top Right Corner Elements

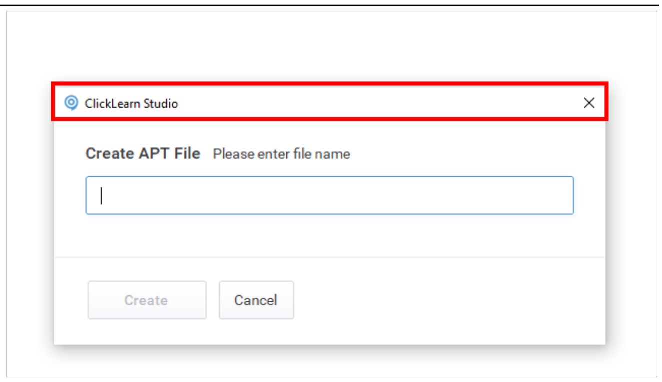
Click on the button **New**.



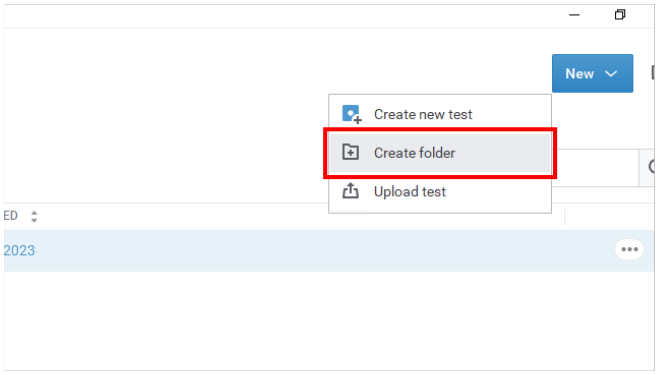
Create a new test: This option allows you to **create a new test**.



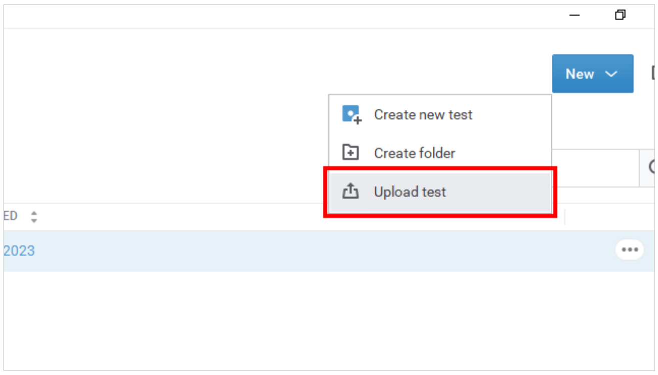
Creating a new test opens up a window where you can name the APT file.



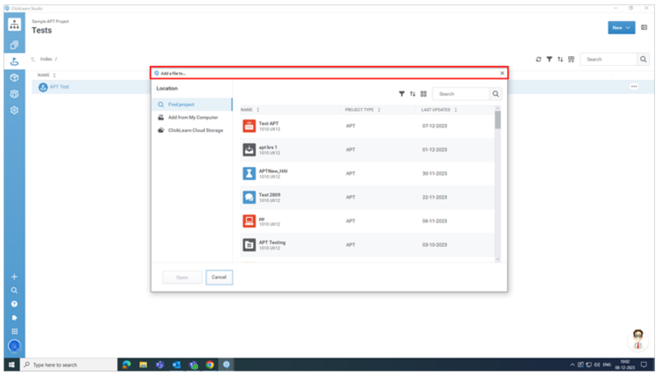
Create folder: This option allows you to **create a folder**.



Click on the menu item **Upload test**.



This pops up with a new window that allows you to select the test file from different projects.

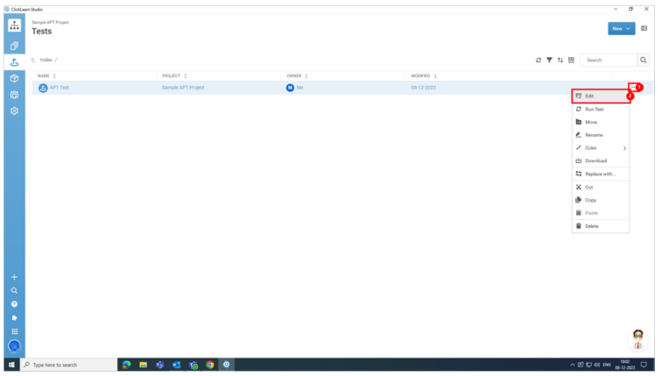


9.2.2. Other Elements

9.2.2.1. Edit

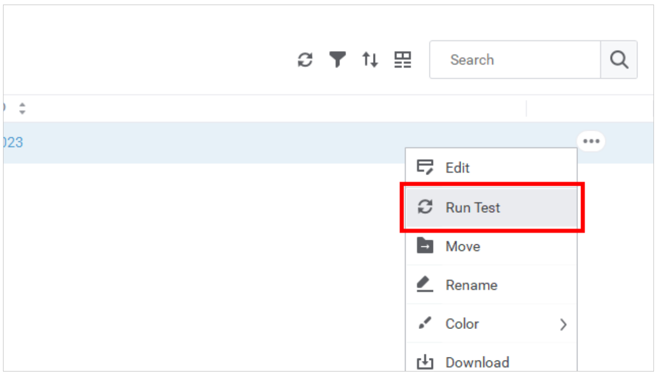
Edit

1. Click on the button **More** of grid cell **Action**.
2. **Edit:** This option allows you to **edit** a test.



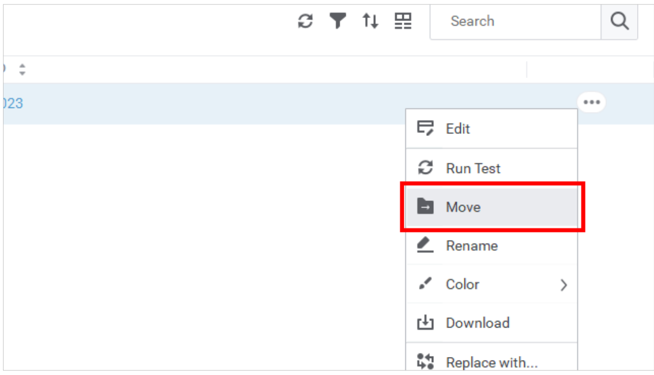
9.2.2.2. Run Test

Run Test: This option allows you to **Run Test**.



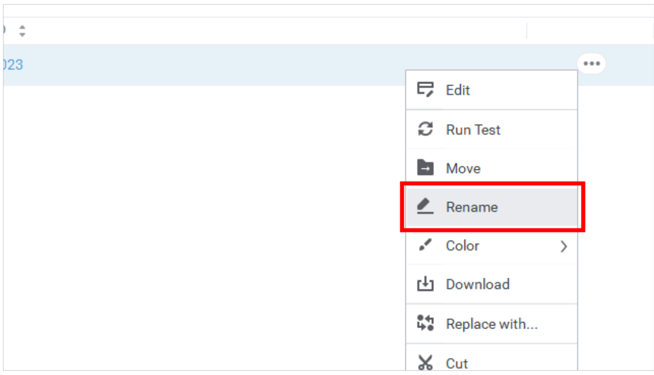
9.2.2.3. Move

Move: You can **Move** the selected test to a different folder.



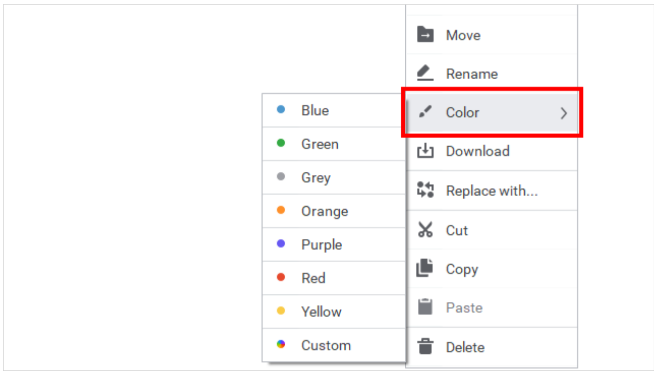
9.2.2.4. Rename

Rename: You can **Rename** the selected test.



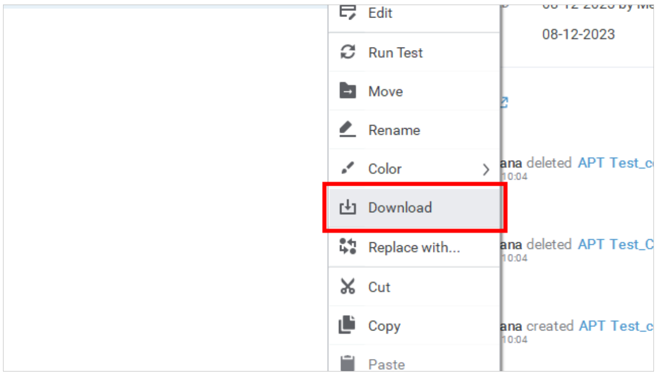
9.2.2.5. Color

Color: Choose the **Color** from the given options for the selected test.



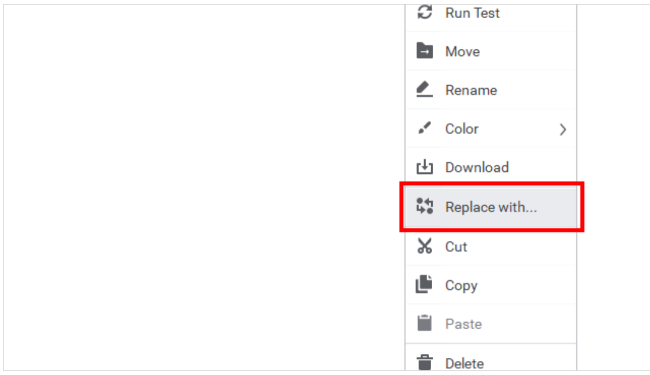
9.2.2.6. Download

Download: You can **Download** the selected test file.

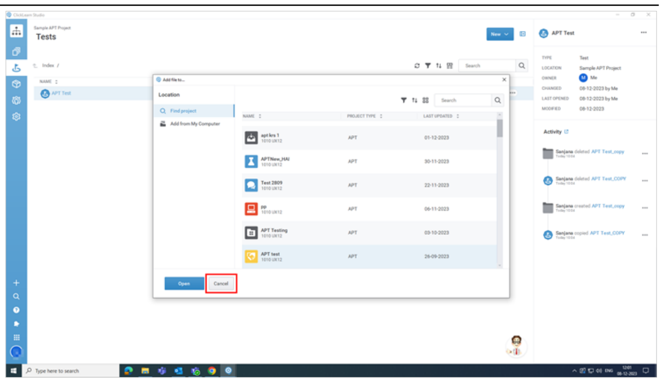


9.2.2.7. Replace with

Replace with: Click on the menu item **Replace with**.



This pops up with a new window that allows you to replace the selected test files from different projects. Click on the button **Cancel**.



9.2.2.8. Cut

Cut: You can use this function to relocate the original recording and paste it to a different location of your choice.

9.2.2.9. Copy

Copy: You can copy the recording you have selected.

9.2.2.10. Paste

Paste: Paste will save the copied recording at the chosen location.

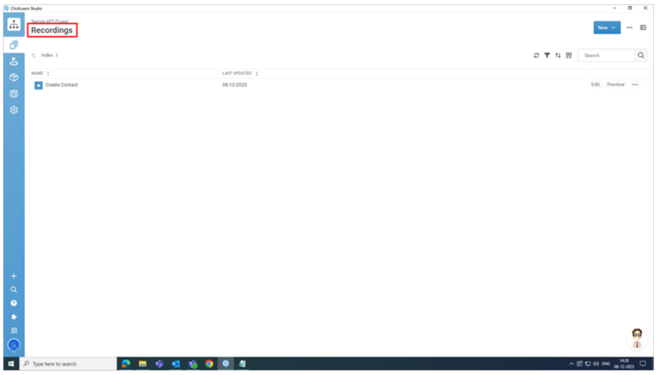
9.2.2.11. Delete

Delete: This function will delete the selected recording.

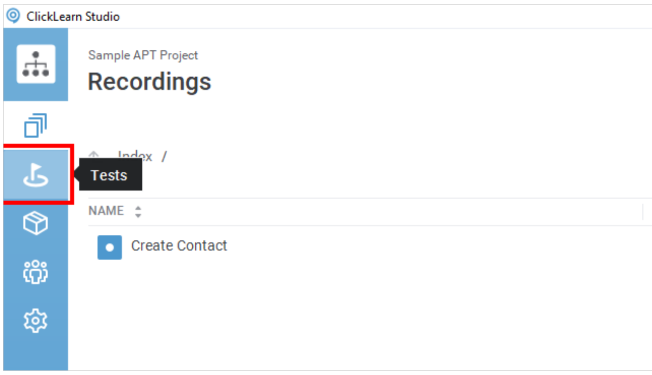
9.3. Create a test and use objects in the test

9.3.1. Steps to create a test

When creating an automated process testing, the first and foremost thing is having recordings in the **Recordings** panel. When you create a new APT project, there are no recordings for that particular project. You have two options: create a new recording by clicking the New button or import recordings from other projects.



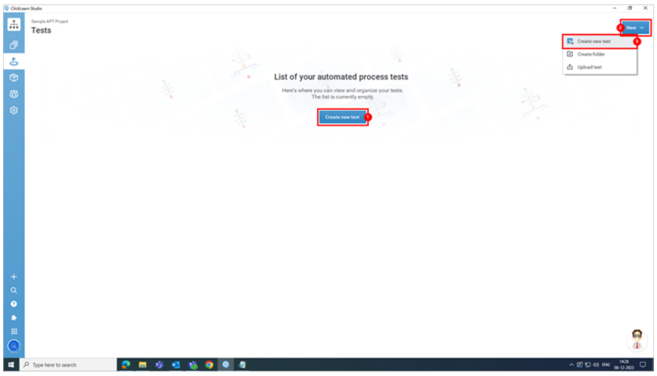
Click on the button **Tests**.



9.3.1.1. Create a new test.

Create new test

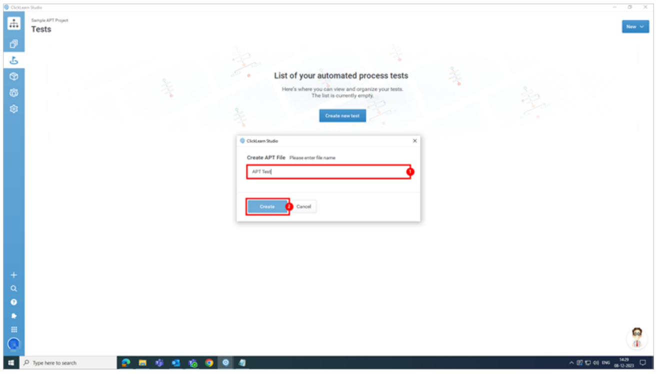
1. There are two ways in which you can create a new test. Click on the button **Create new test**.
2. Another way to add a new test is to click the **New button**.
3. Click on the menu item **Create new test**.



9.3.1.2. Create APT File

Create APT File

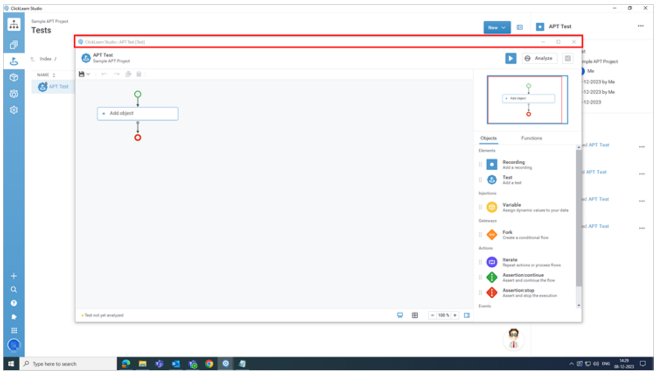
1. Click on the **textbox** and enter the name for the APT file.
2. Click on the button **Create**.



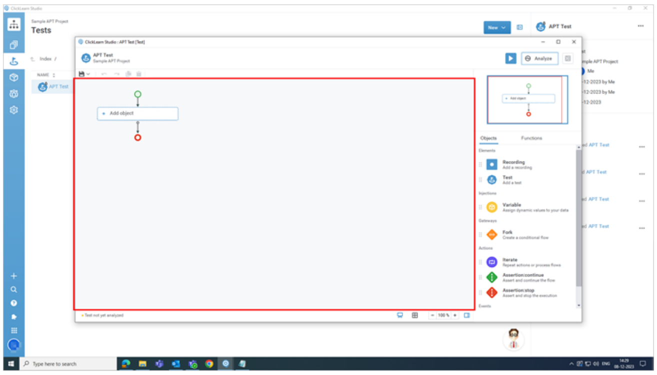
9.3.1.3. Process View

9.3.1.3.1. Adding objects to the APT File

Click the Create button, which opens a new window like this. You can add two things to an APT file: objects and functions.



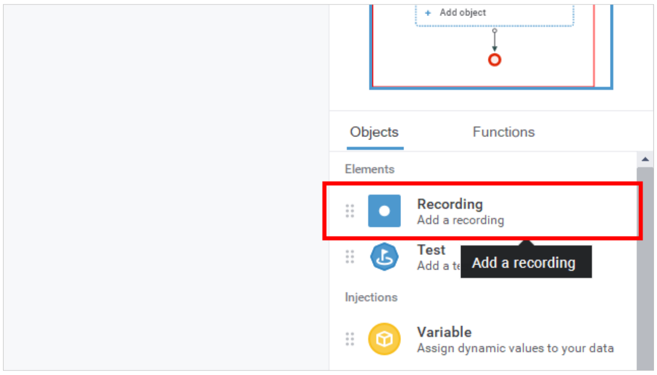
To use the objects, drag and drop them into the **test panel**.



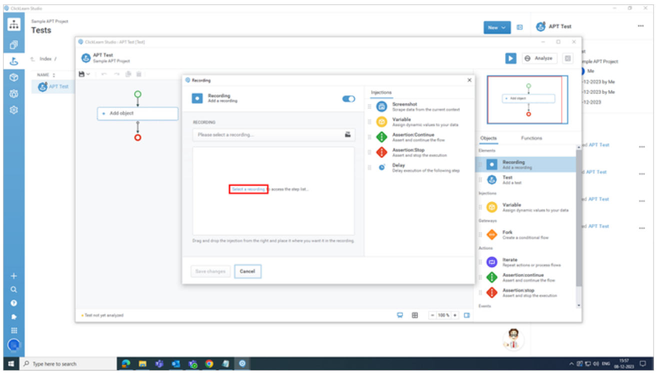
9.3.1.4. Elements

9.3.1.4.1. Recording

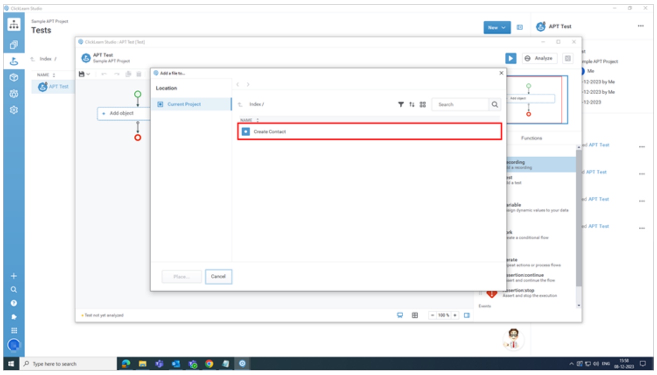
Recording: This is used to add a recording to your test. Click on the **node Recording**.



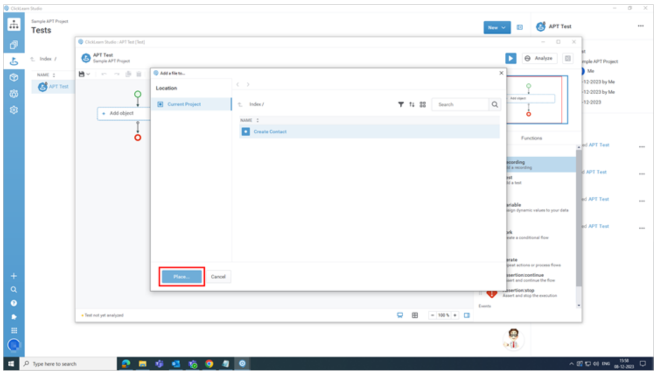
From the panel, click on the label **Select a recording**.



Select the recording you wish to include. In our case, we have selected the recording **Create Contact**.

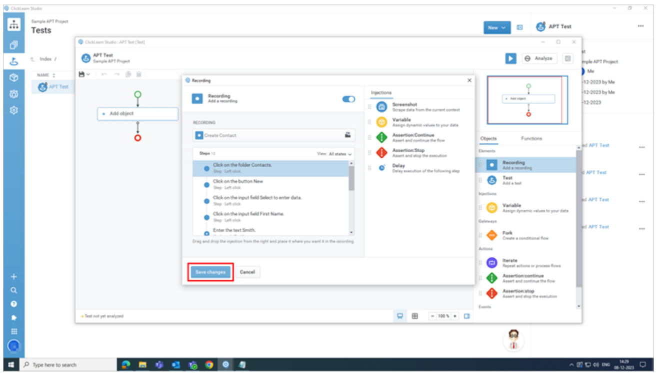


Click on the button **Place**.



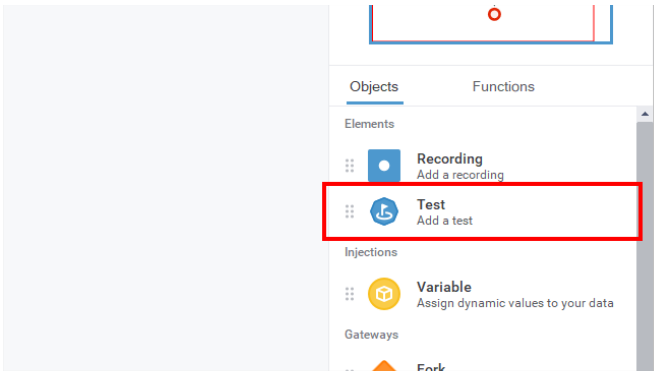
Click on the button **Save changes**.

NOTE: The function of elements in injections is the same as that of objects in the process view. The only difference is you can add injections to your recordings.

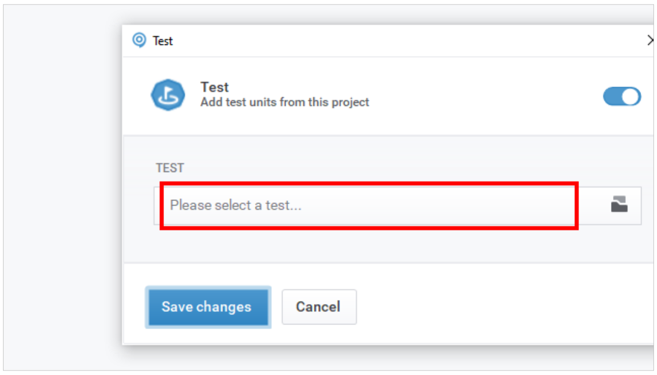


9.3.1.4.2. Test

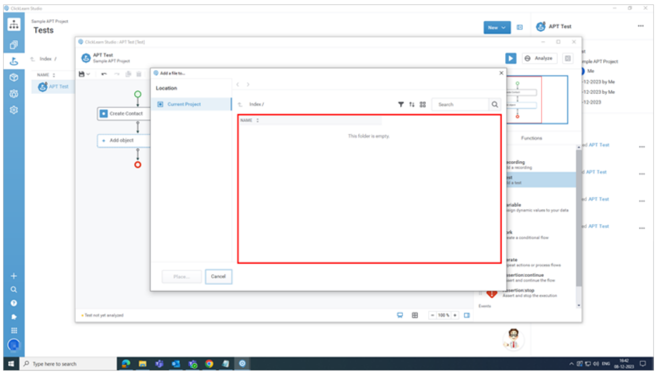
Test: This is used to add an existing test from your project. Click on the **node Test**.



Click on the label. **Please select a test.**



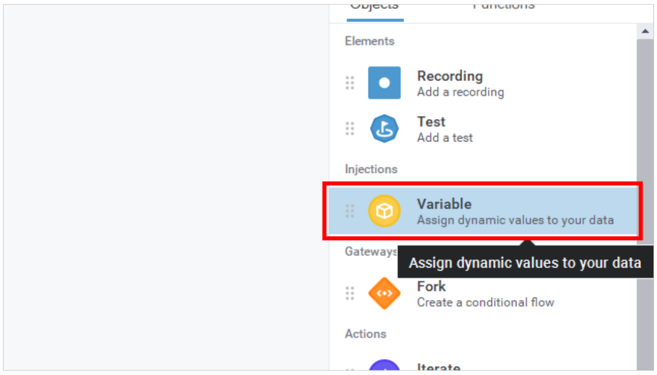
You can select the existing tests from the dialog box that opens up. If you already have the test in that particular project, select the file and click on Place.



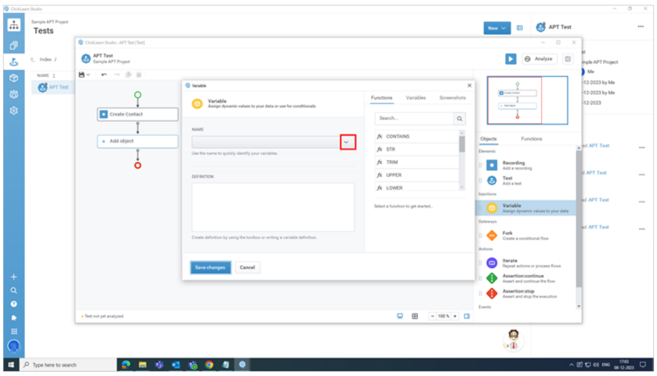
9.3.1.5. Injections

9.3.1.5.1. Variable

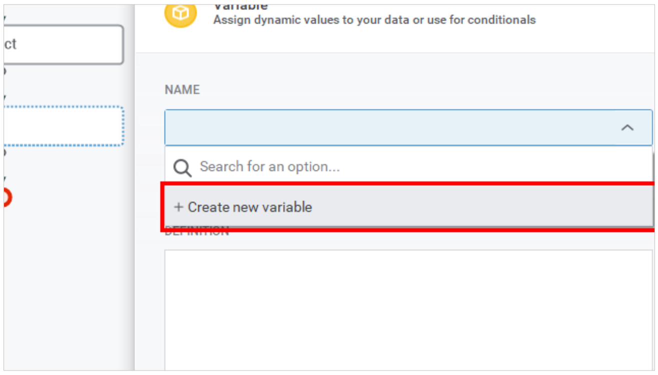
Variable: You can assign dynamic values to your data.



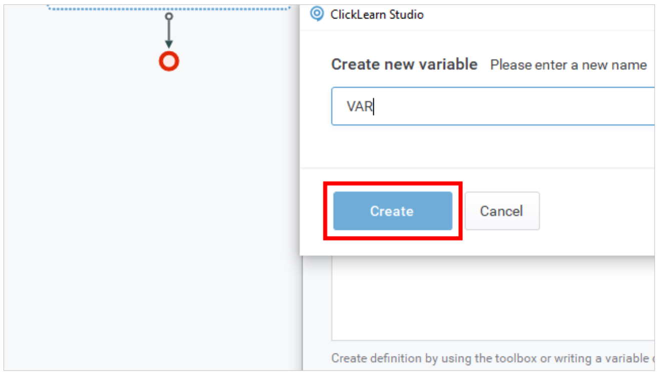
Click on the **dropdown button for the Variable Name**.



To create a new variable, click on the list view item. **Create new variable**.

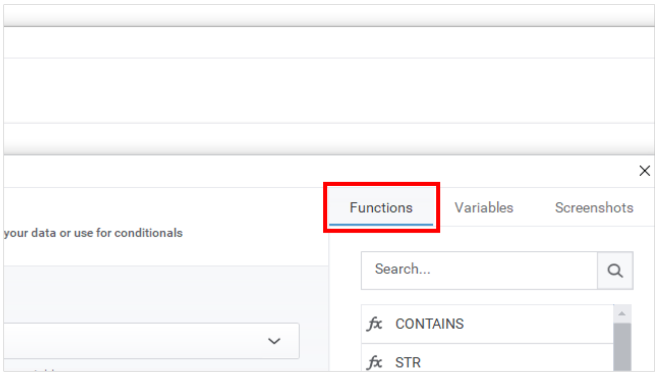


Click on the textbox, enter the variable's name, and click the **Create** button.

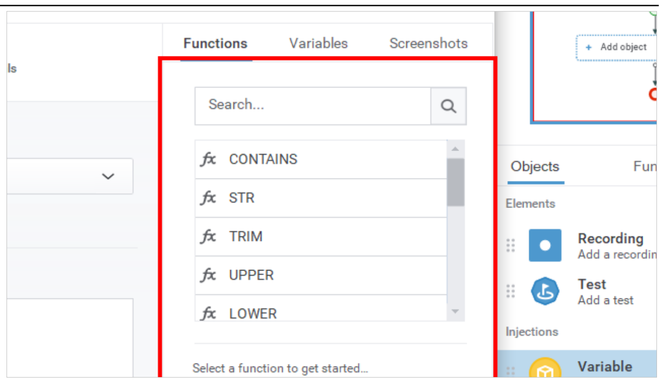


There are three other options, namely Functions, Variables, and Screenshots.

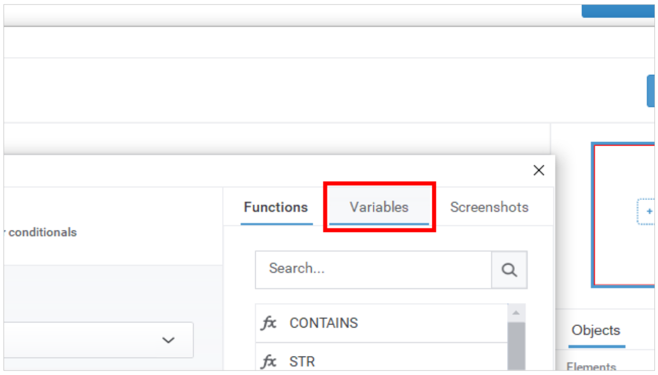
Click on the **tab item Functions**.



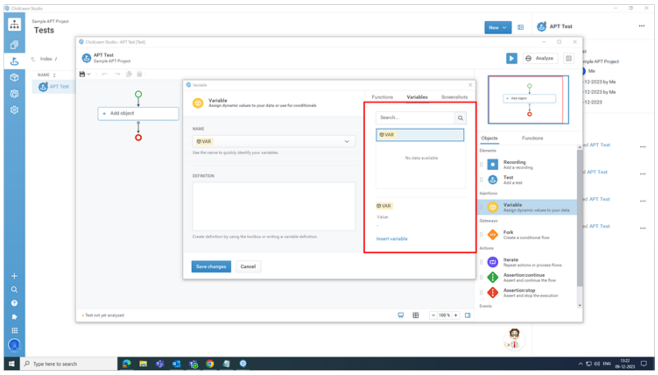
This displays the list of functions you can use along with variables.



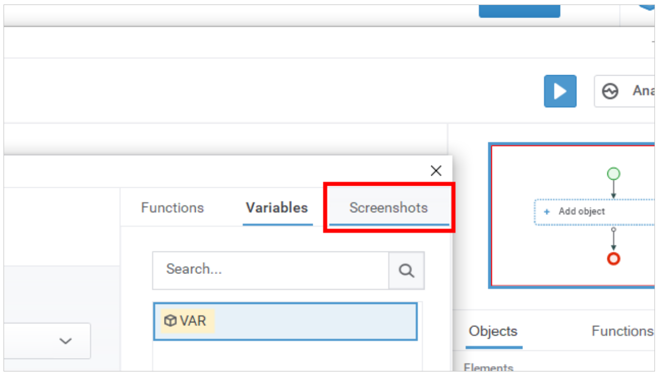
Click on the **tab item Variables**.



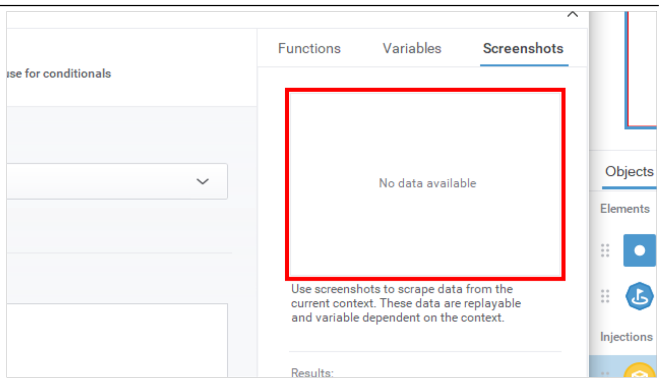
It will display the variables that you have created.



Click on the **tab item Screenshots**.



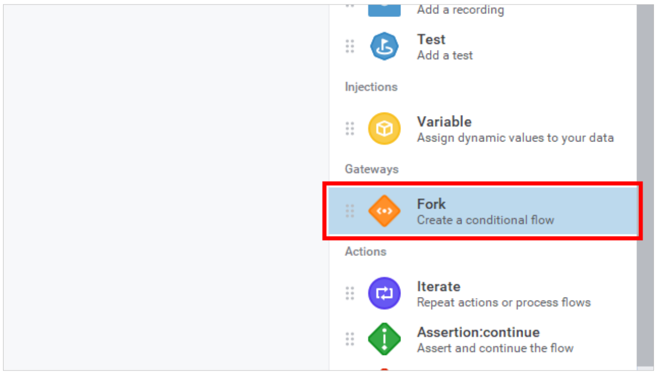
It displays the screenshot you can use to scrape data from the current context.



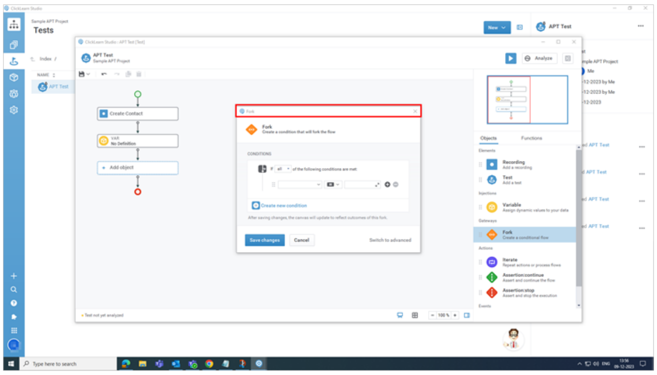
9.3.1.6. Gateways

9.3.1.6.1. Fork

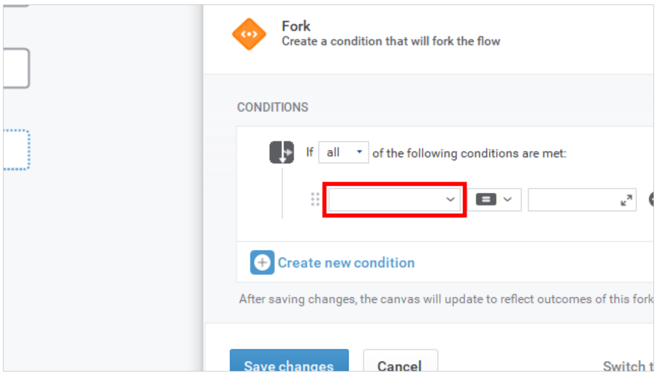
Fork allows you to create a conditional flow for your test. Click on the **node Fork** and drag and drop in the test panel.



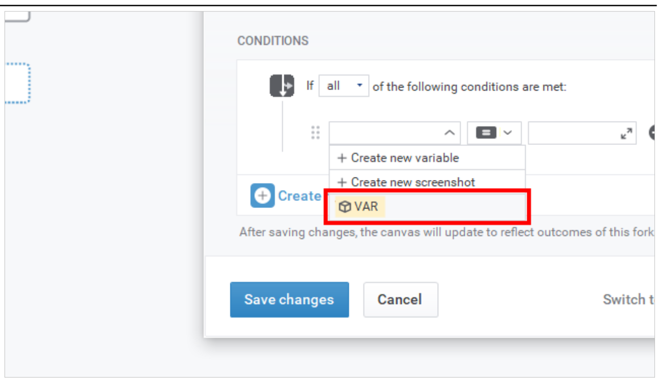
This opens up a new window, allowing you to set test conditions.



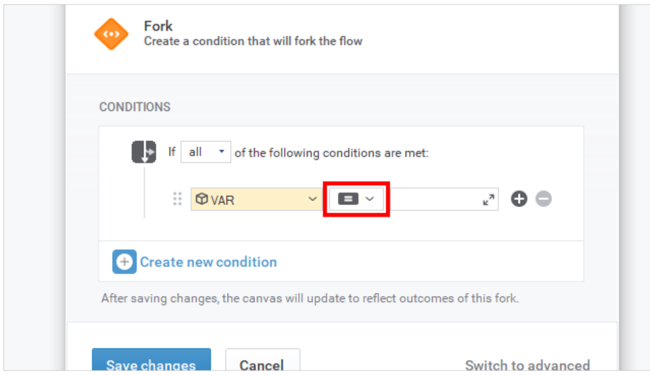
Click on the **dropdown item**.



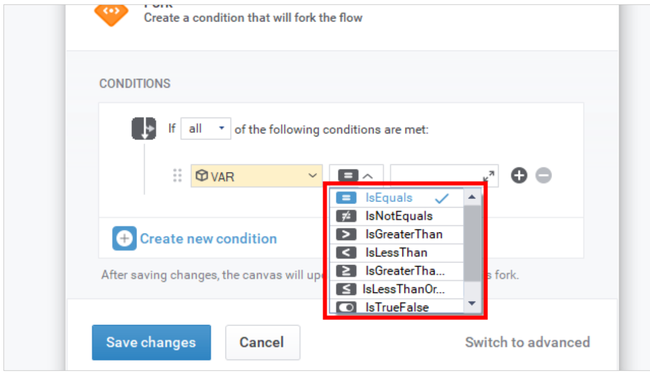
You can create a new variable from here, create a new screenshot, or use the variable you created earlier. Click on the **dropdown item VAR**.



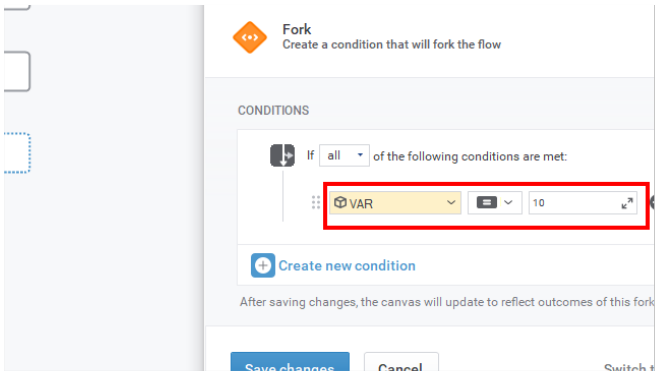
Click on the dropdown item **IsEquals**.



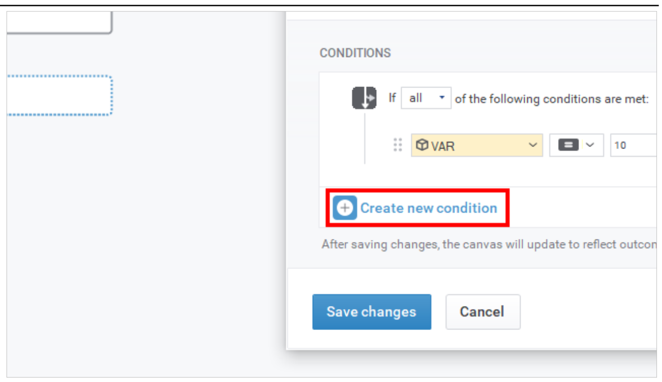
Select an option from the **dropdown** and assign a value to the variable.



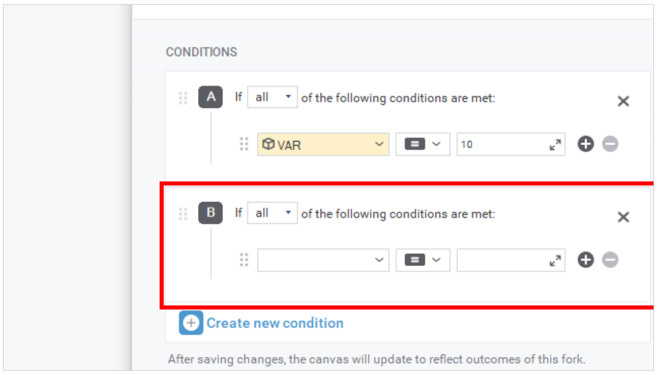
This is what your condition looks like.



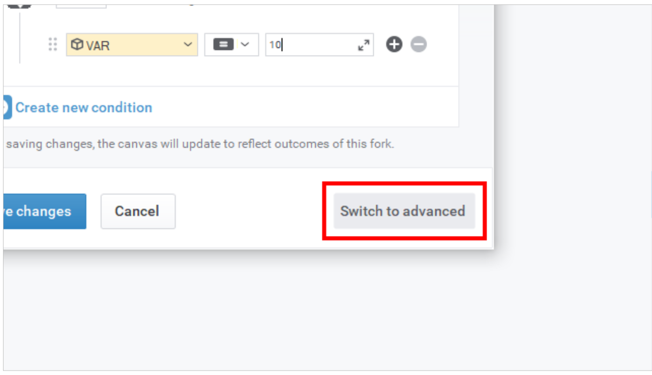
To create another condition, click on the button **Create new condition**.



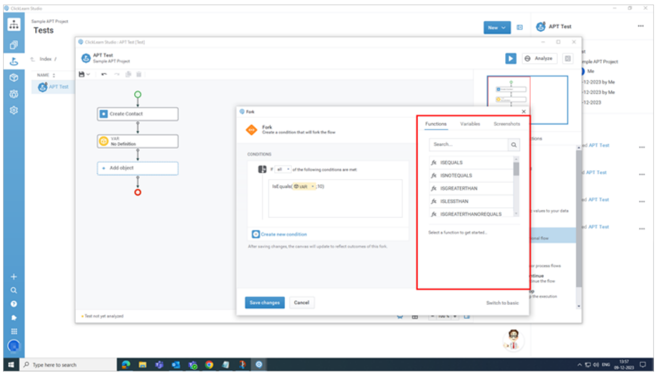
You can add multiple conditions similar to the first condition we have added.



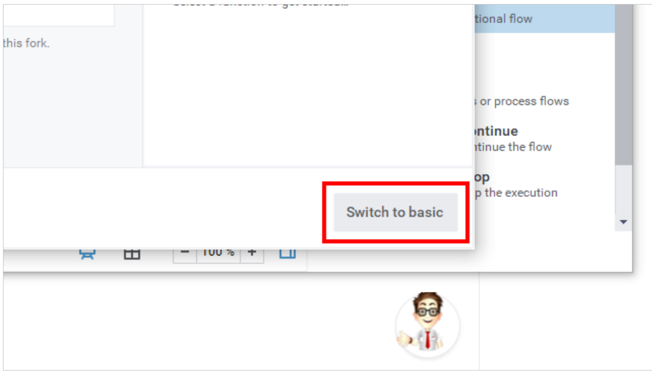
Click on the button **Switch to advanced**.



This opens up the advanced section of functions, variables, and screenshots.



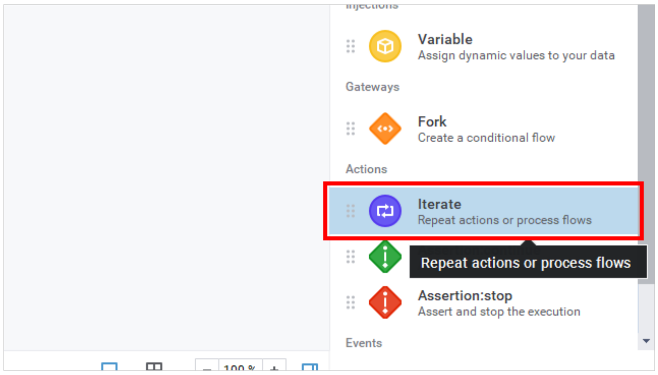
Click on the button **Switch to basic** to switch back to the basic menu.



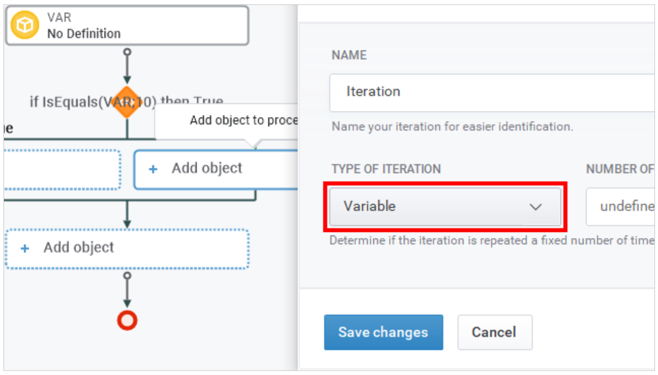
9.3.1.7. Actions

9.3.1.7.1. Iterate

Iterate can run a particular process multiple times or in a loop. Click on the **node Iterate**.



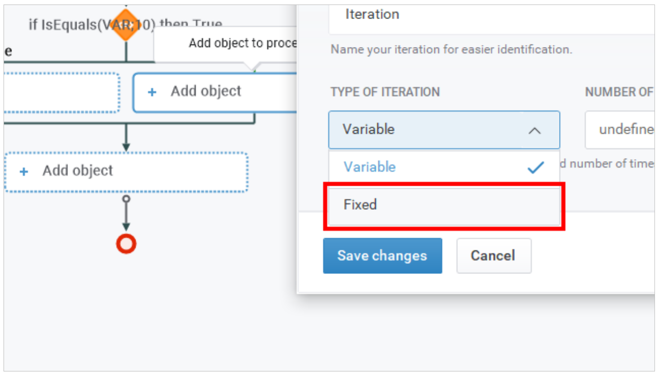
Enter the name of the iteration and click on the **dropdown Type Of Iteration.**



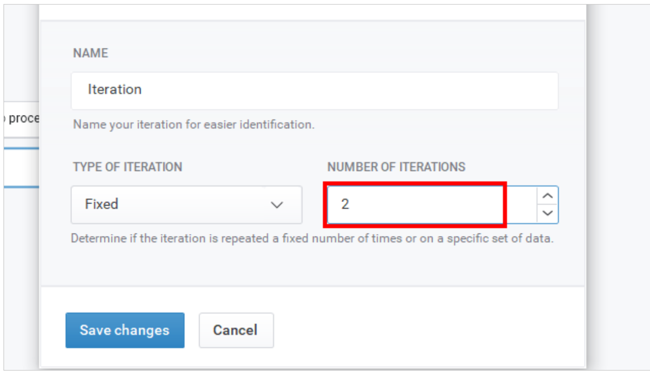
The type of iteration will determine the number of times the iteration is executed.

Fixed: You can write a fixed number, and the iteration will execute only that many times.

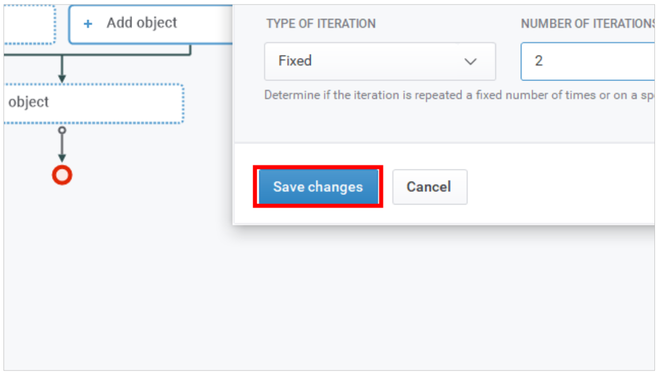
Variable: In the case of variables, the number will be determined based on scenarios or the conditions you added to your process.
Click on the **dropdown item Fixed**.



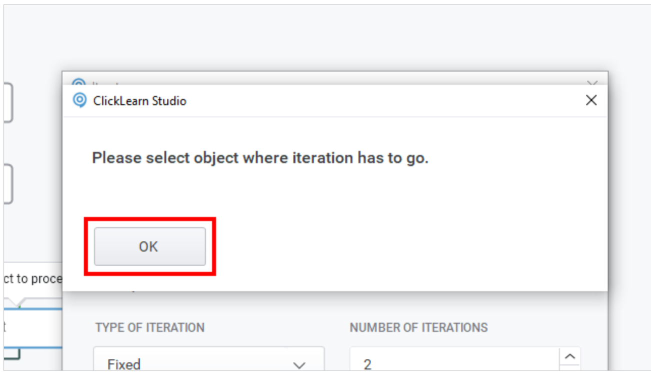
Click on the **input textbox** and enter the value based on your requirement.



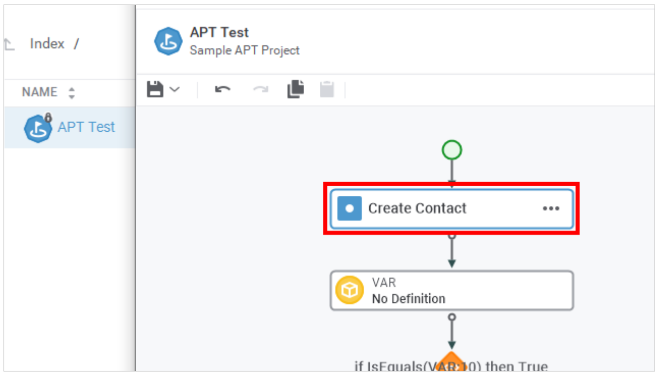
Click on the button **Save changes**.



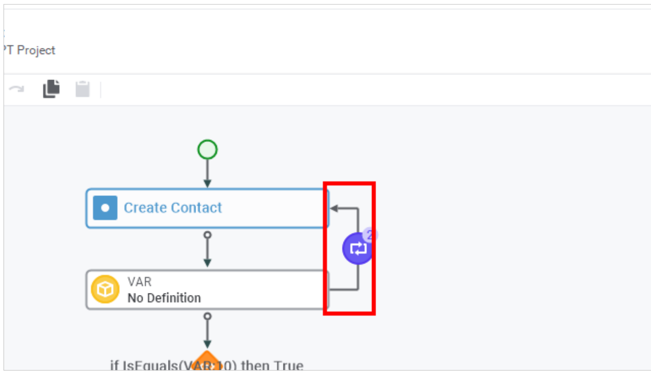
It pops up a new window asking you to select the object where the iteration has to go. Click on the button **OK**.



Click on the **diagram element Recording with the value Create Contact**.

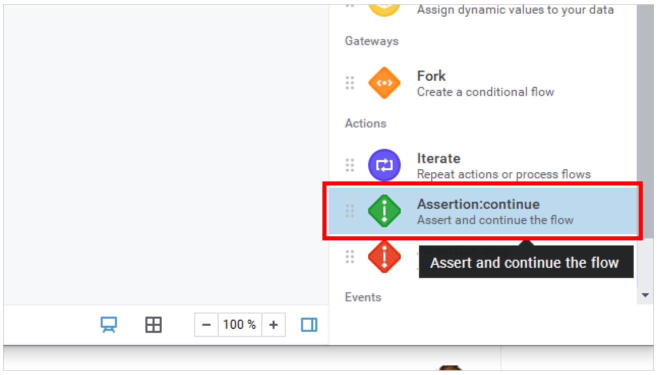


And this is how the iteration shows up.

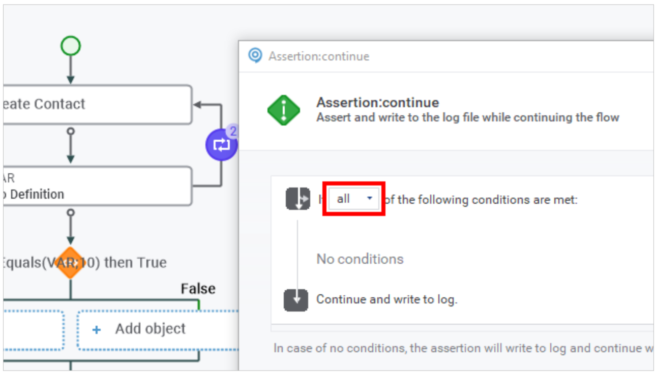


9.3.1.7.2. Assertion: continue

Assertion continue: Adds assertion and continues the flow. Click on the **node Assertion: continue**.

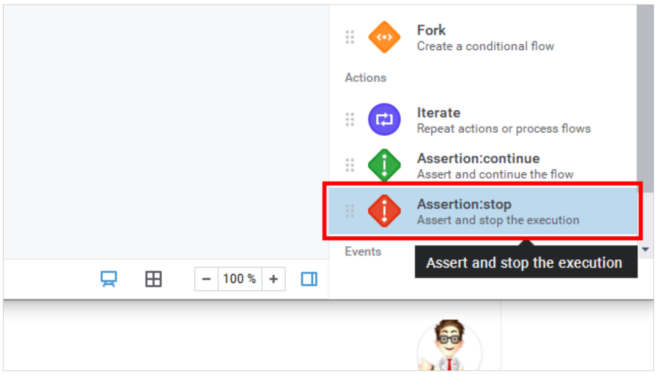


You can add a condition; for example, if all or any conditions are met, the assertion will continue and write to the log file. Click on the **dropdown item all.**

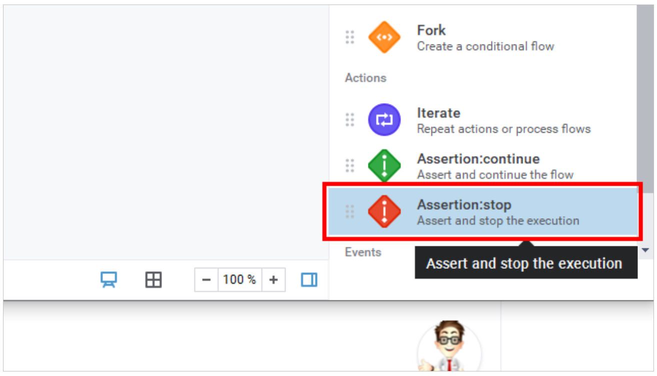


9.3.1.7.3. Assertion: stop

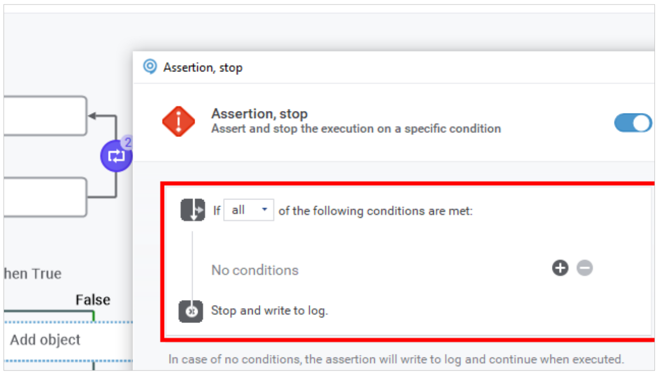
Assertion: stop adds assertion and stops the execution. Click on the node **Assertion: stop.**



Click and drag and drop the node **Assertion: stop.**

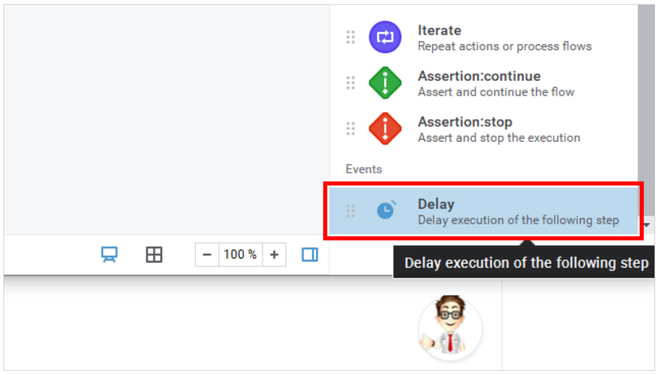


If all or any of the conditions are met, you can add a condition like the assertion will stop and write it to the log file.

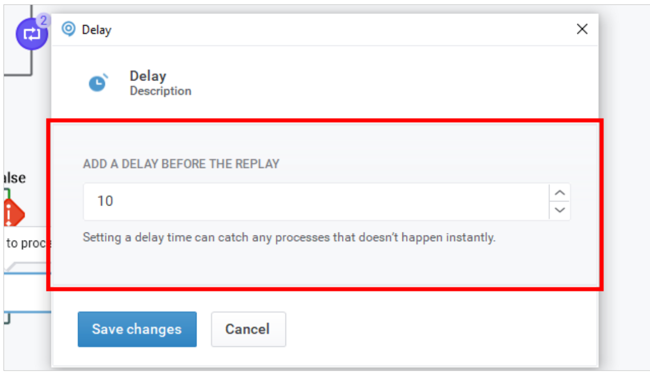


9.3.1.7.4. Delay

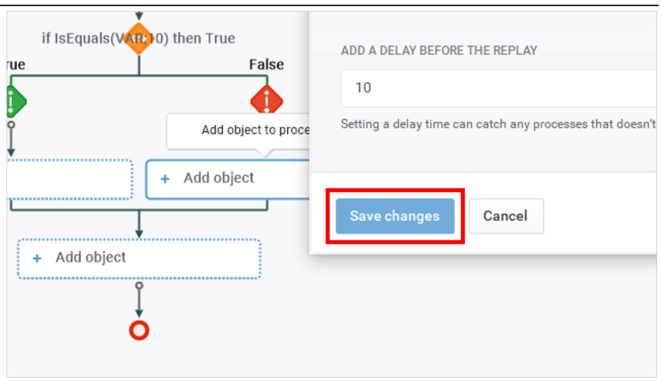
Delay allows you to add a delay of seconds in between your test. Click on the node **Delay**.



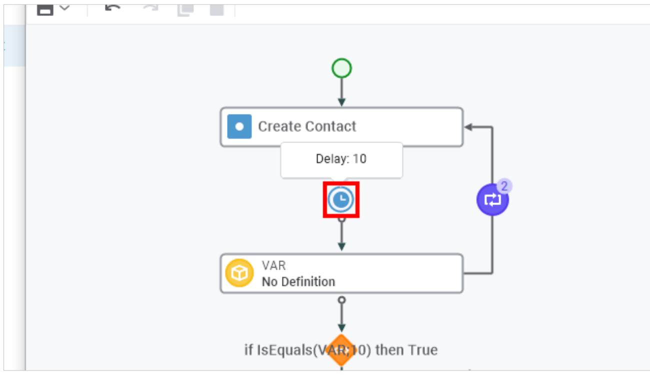
Enter the value based on your requirements.



Click on the button **Save changes**.



This adds a delay of 10 seconds.

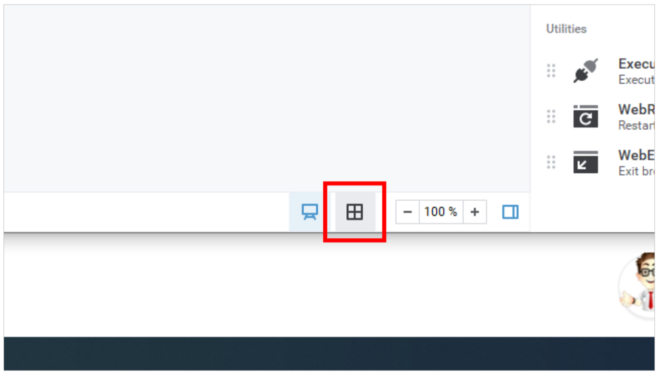


9.4. Data View in APT

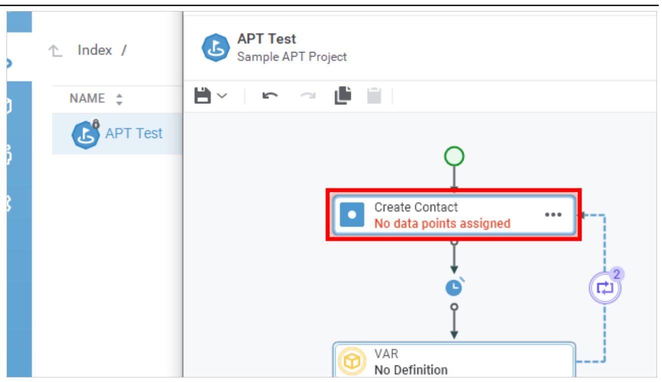
9.4.1. Introduction

To run an APT test case, you must first set up data for the applicable objects. Click on the icon **Data view**.

NOTE: Only the **process view** panel allows you to assign **objects** and **functions**. Similarly, only the **data view** panel will allow you to assign **data points**.

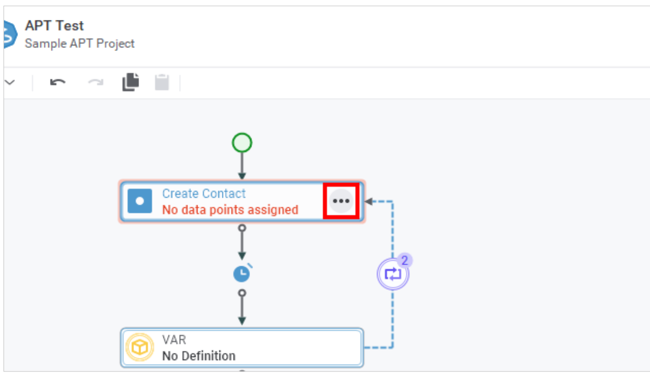


Click on the diagram element **Recording** with the value **Create Contact,** which indicates no data points assigned.



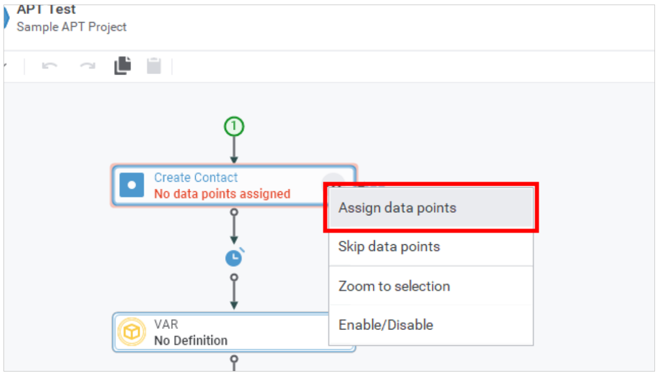
9.4.2. More options associated with data points

Click on the diagram element **More** with value.

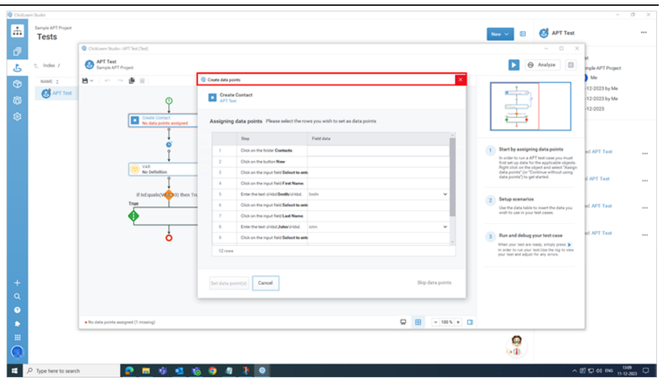


9.4.2.1. Assign data points

Click on the menu item **Assign data points**.

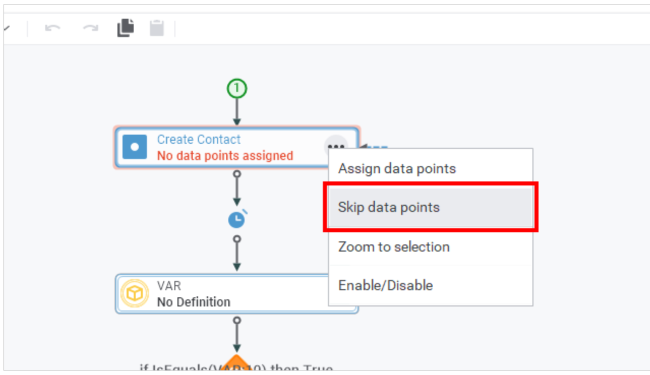


This opens a new window of **Create data points,** which allows you to set data points.

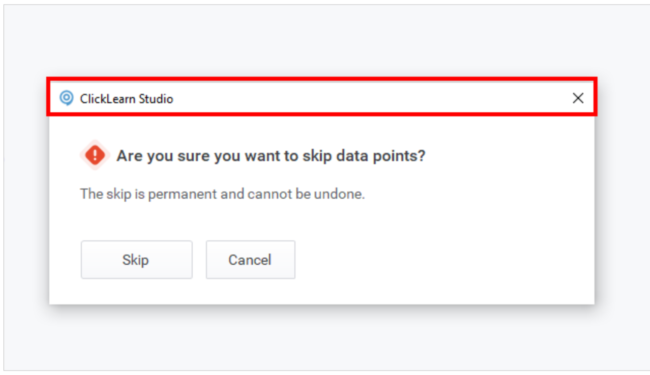


9.4.2.2. Skip data points

Click on the menu item **Skip data points**.

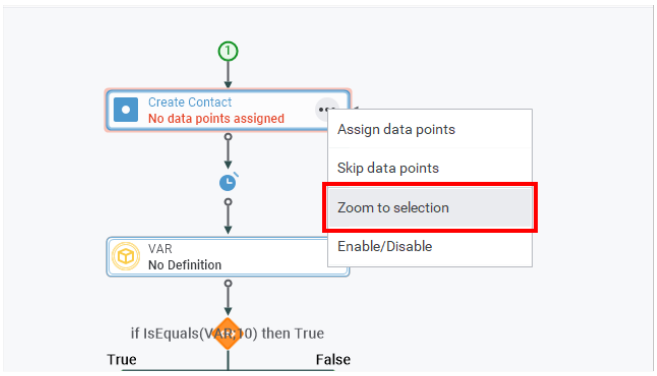


This opens a new window, where you select Skip, which allows you to Skip data points and proceed with the test.



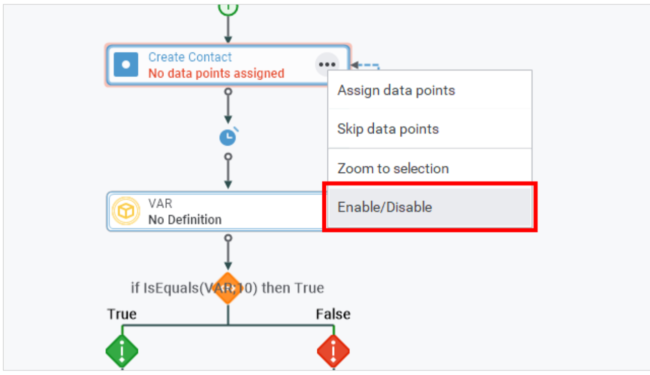
9.4.2.3. Zoom to selection

Click on the menu item **Zoom to selection**. This will zoom in on the data view.



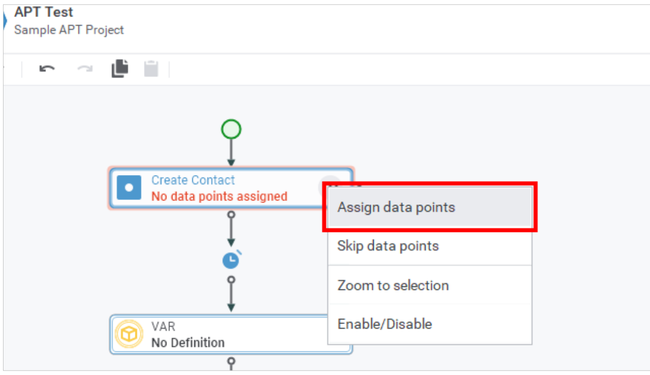
9.4.2.4. Enable/Disable

Click on the menu item **Enable/Disable**. This will disable the data points. Click the Enable/Disable menu item to enable the data points again.



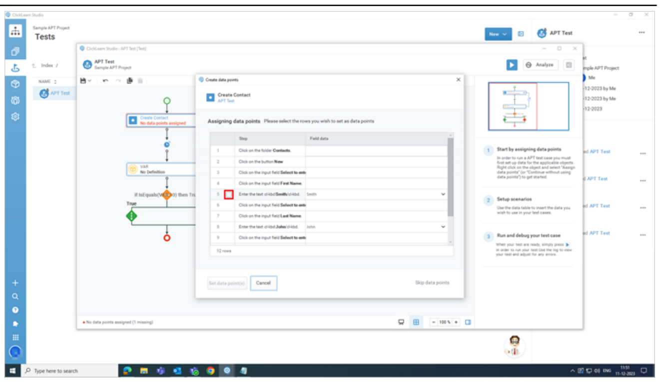
9.4.3. Assigning data points

Click on the menu item **Assign data points**.

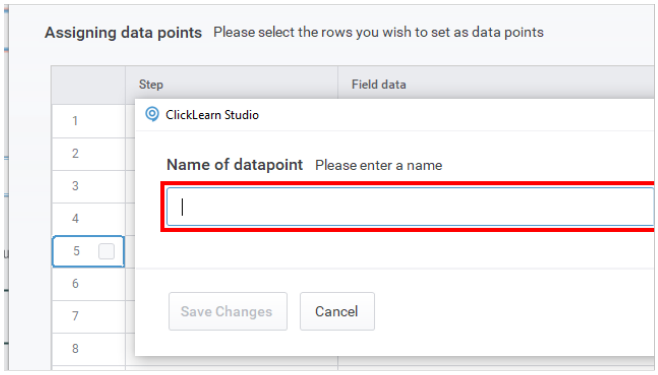


A new window lets you choose the rows you want to use as data points. Click on the checkbox of the grid cell.

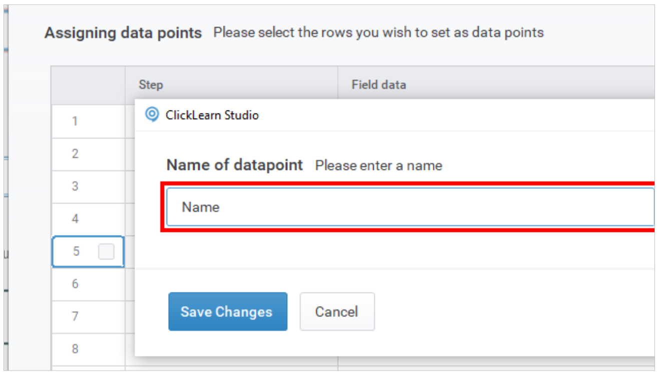
NOTE: You can only assign the data points to the rows which contain a checkbox.



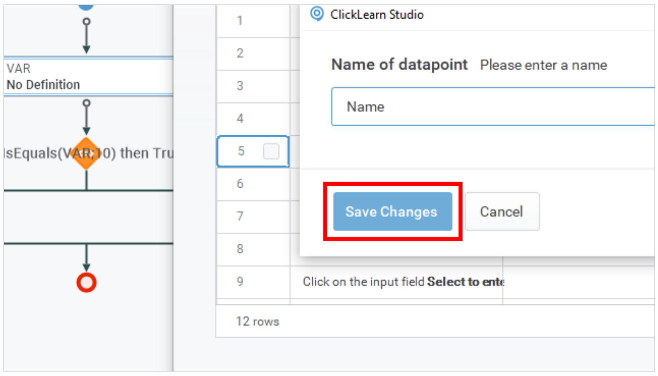
Click on the textbox **Txt Rename**.



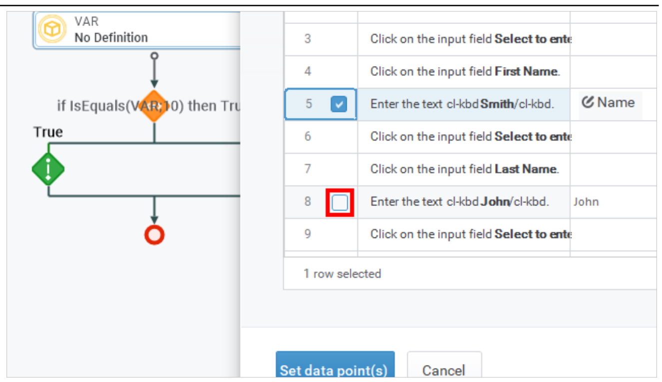
Click on the textbox **Txt Rename** and enter the Name for the data point.



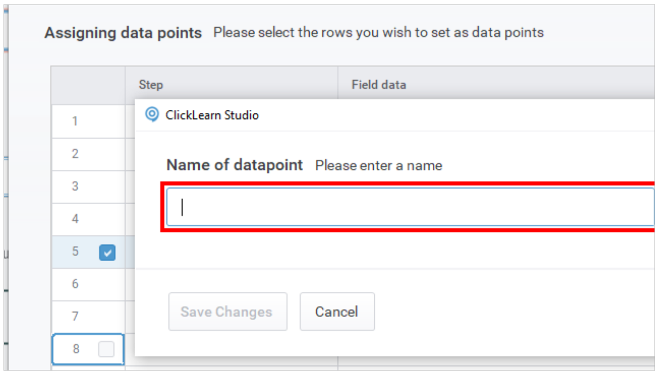
Click on the button **Save Changes**.



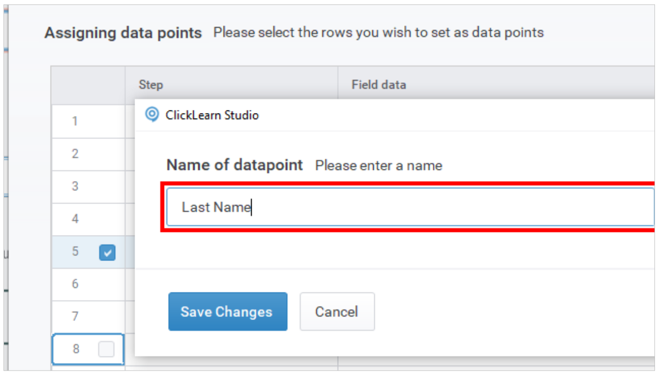
Click on the checkbox of the grid cell.



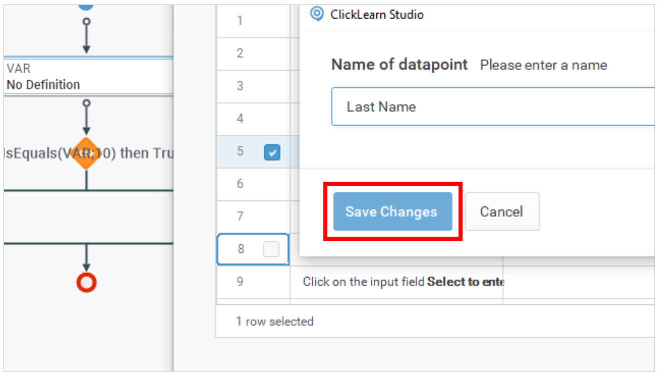
Click on the textbox **Txt Rename**.



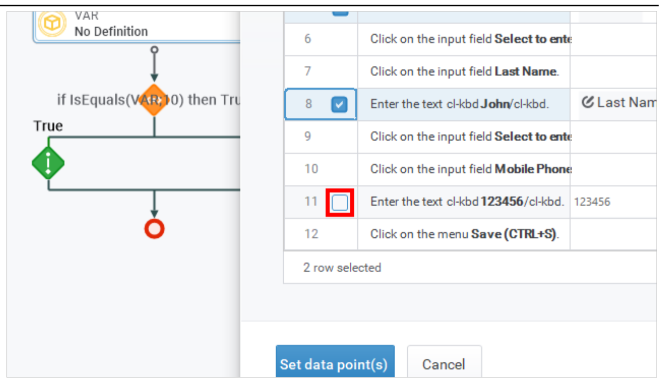
Click on the textbox **Txt Rename** and enter the Name for the data point.



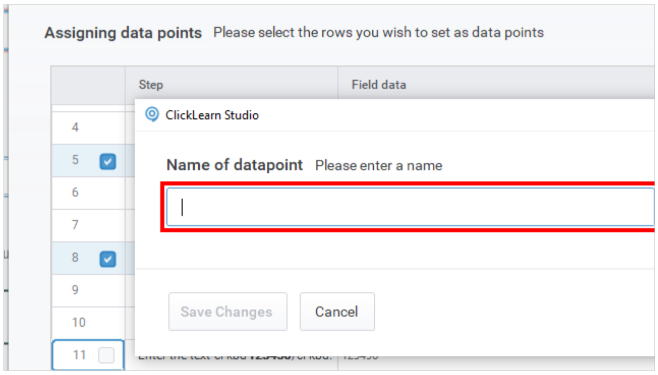
Click on the button **Save Changes**.



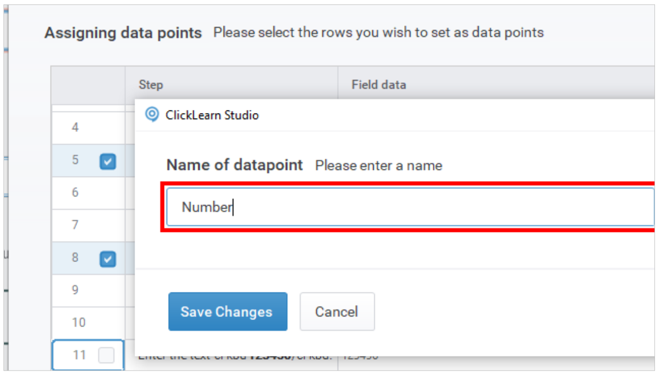
Click on the checkbox of the grid cell.



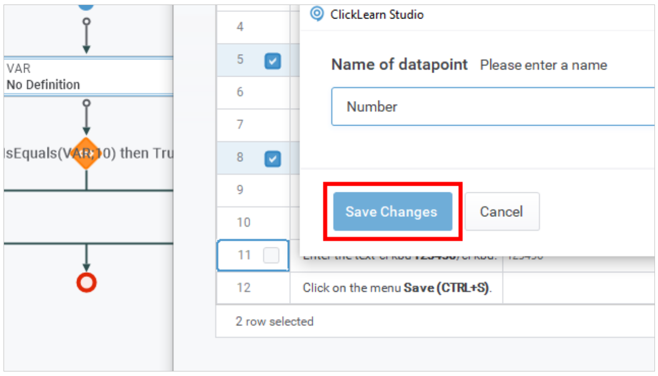
Click on the textbox **Txt Rename**.



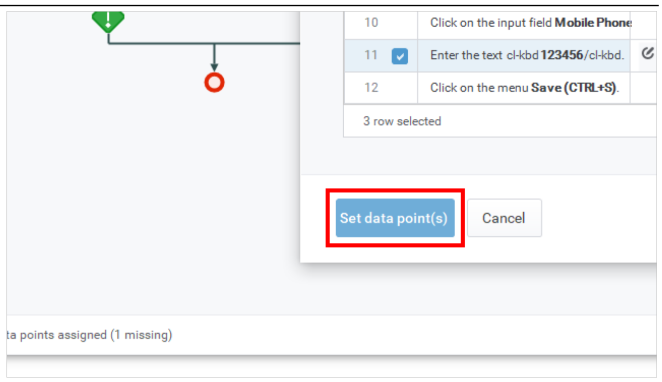
Click on the textbox **Txt Rename** and enter the Name for the data point.



Click on the button **Save Changes**.



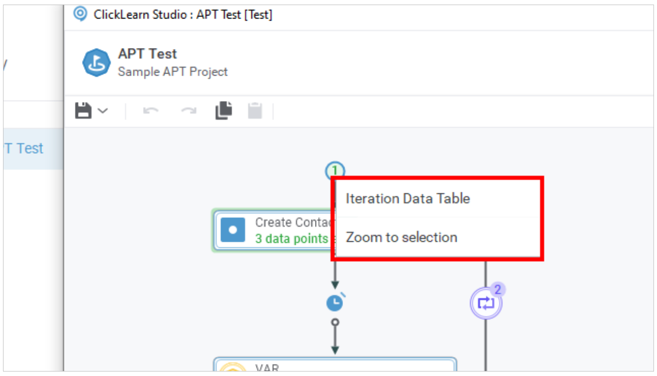
Click on the button **Set data point(s)**.



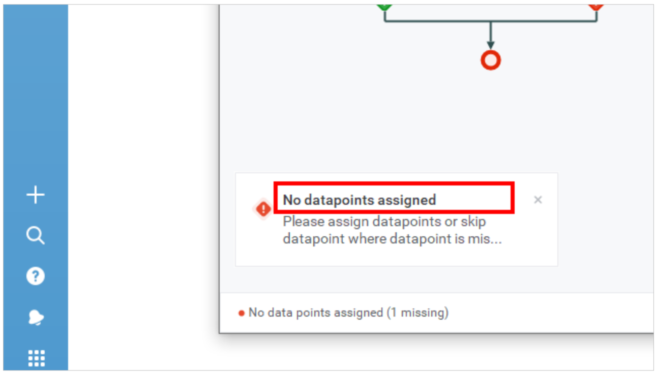
9.4.3.1. Setting up iterations

Right-click on the diagram element start. Click on the diagram element **More** with value. There are two elements.

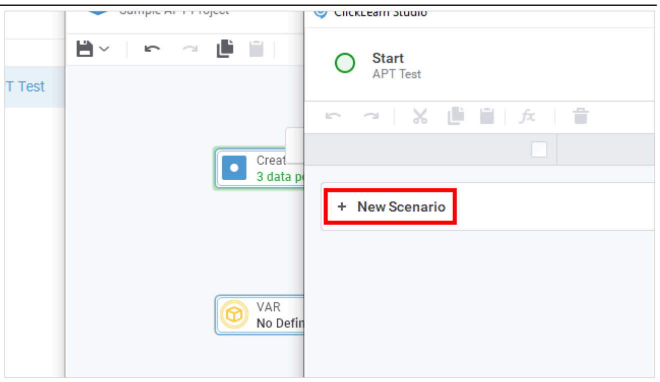
- **Iteration Data Table:** This allows you to add scenarios.
- **Zoom to Selection:** This will zoom in on the data view.



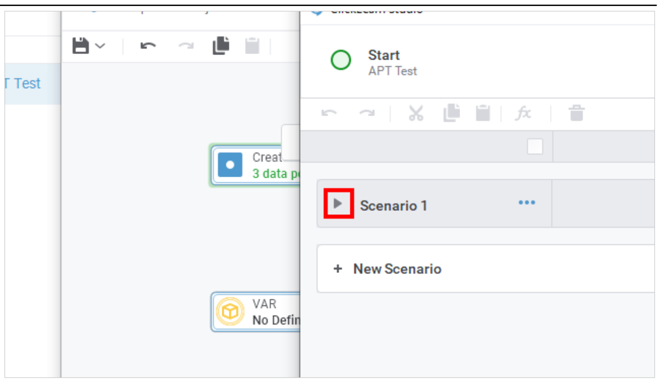
NOTE: Setting or skipping data points is mandatory before starting with iteration. If you have not done the following, it displays a message at the bottom left corner as **No data points assigned**.



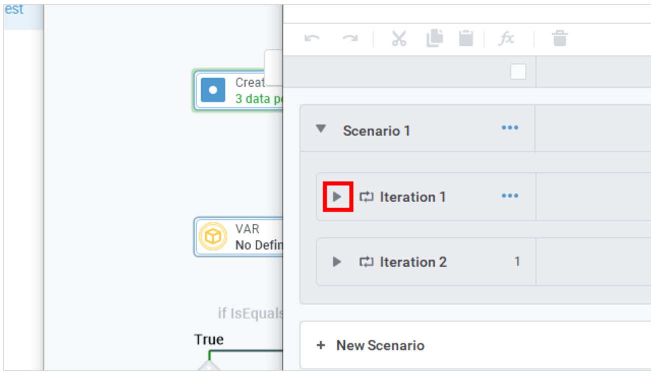
Click on the Iteration Data Table and click on the button **New Scenario**.



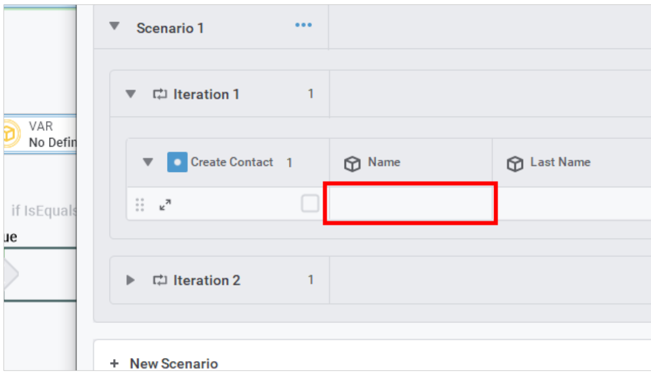
Click on the **Expander** button.



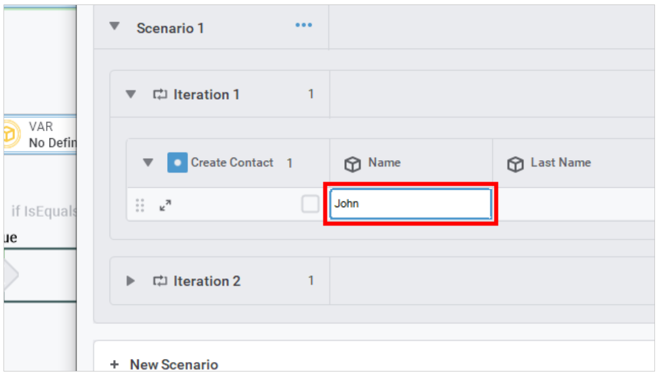
Click on the **Expander** button.



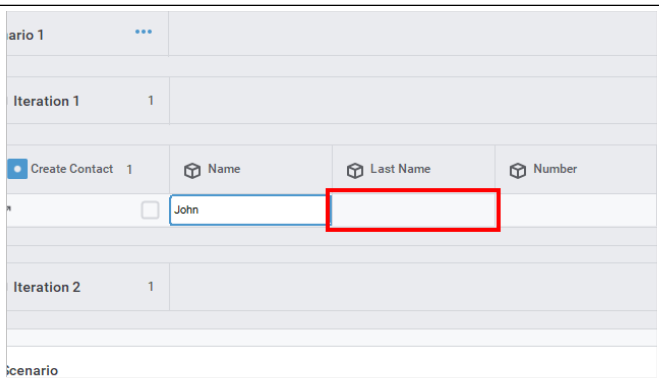
Click on the grid view cell **Name** with data.



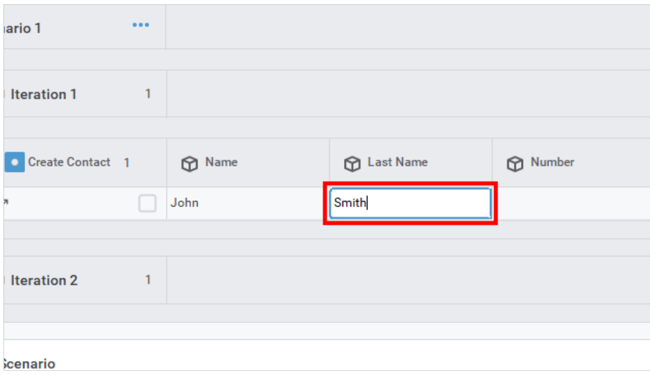
Enter the **Name** based on your requirements.



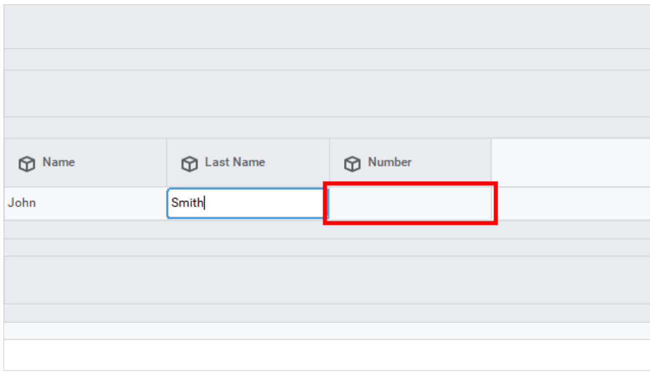
Click on the grid view cell **Last Name** with data.



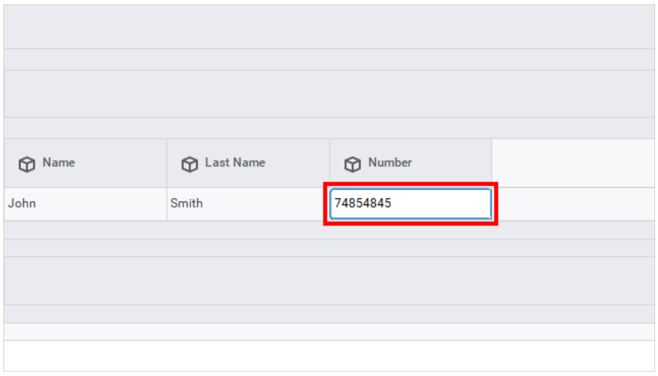
Enter the **Last Name** based on your requirements.



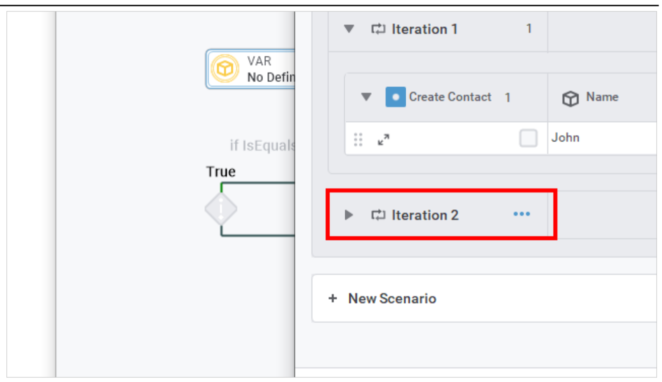
Click on the grid view cell **Number** with data.



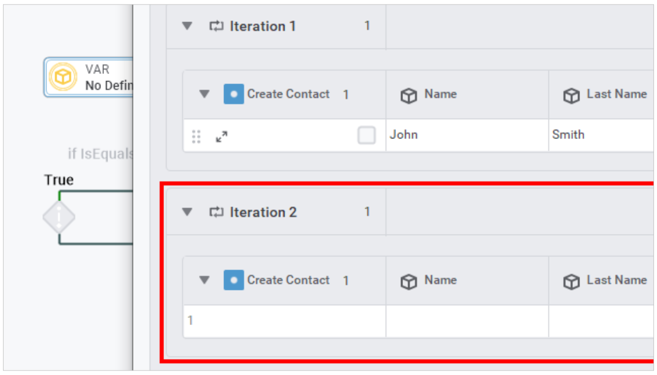
Enter the **Number** based on your requirements.



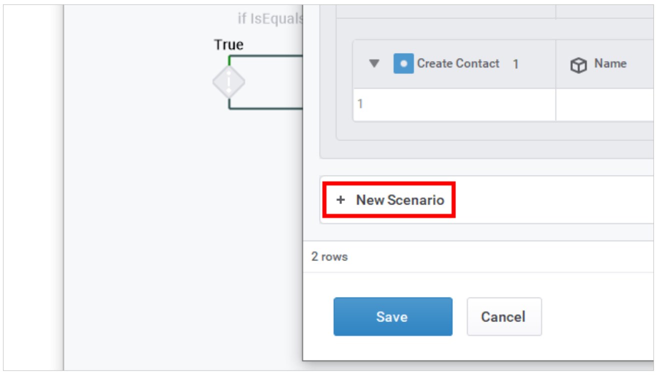
Click on the panel.



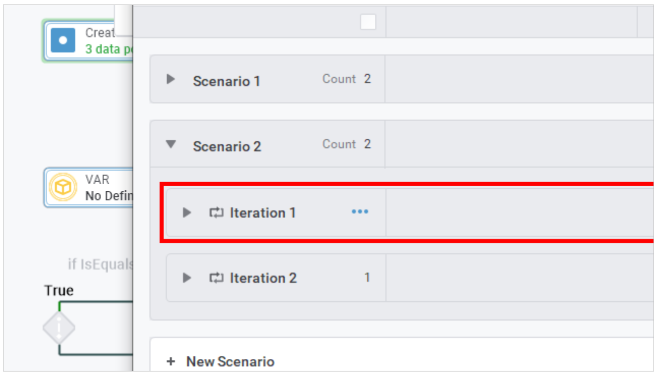
As shown above, you can add more iterations depending on your requirements.



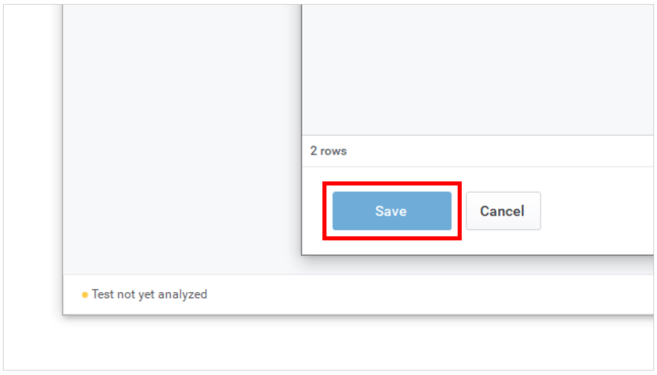
To add a new scenario, click on the button **New Scenario**.



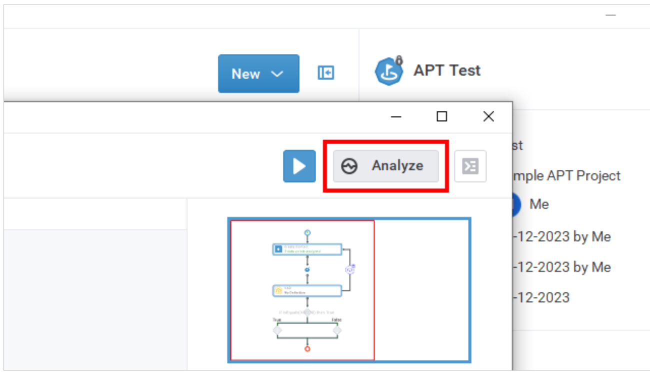
Similarly, you can add iterations for your second scenario.



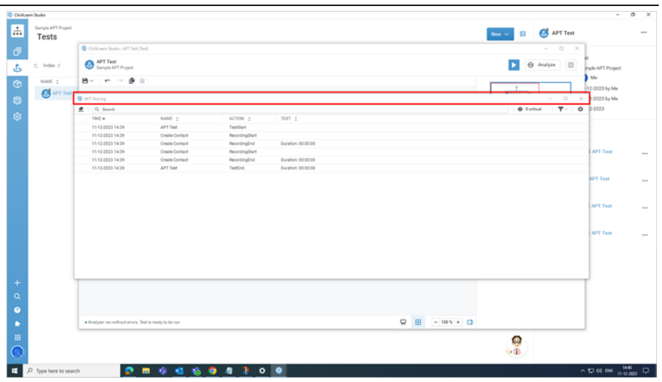
Click on the **Save** button.



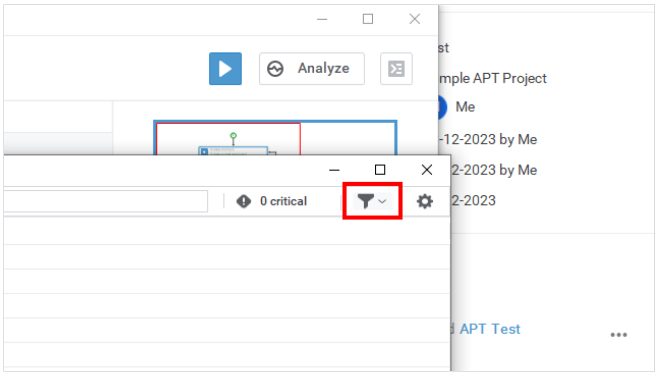
After saving the iterations, click the icon: **Analyze the test for any flow-related issues**.



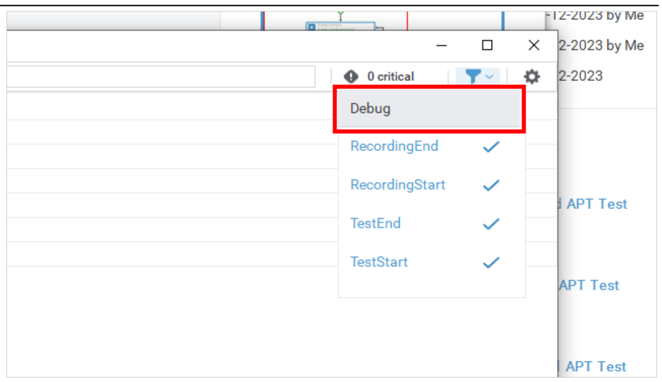
Click on the window title of **APT Test.log**. This shows you the complete flow of your test.



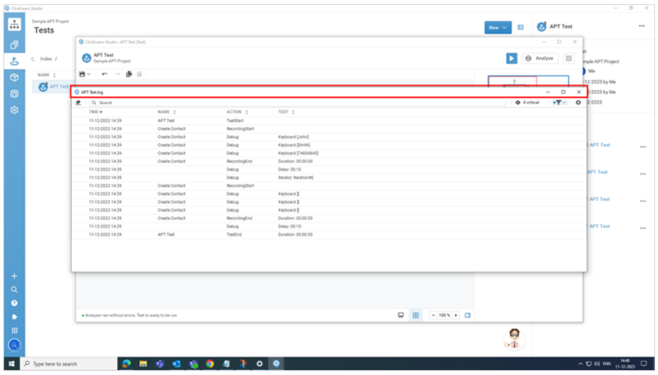
Click the **Log Action Filter** button to view the filter options associated with the log file.



Click on the list view item **Debug**.



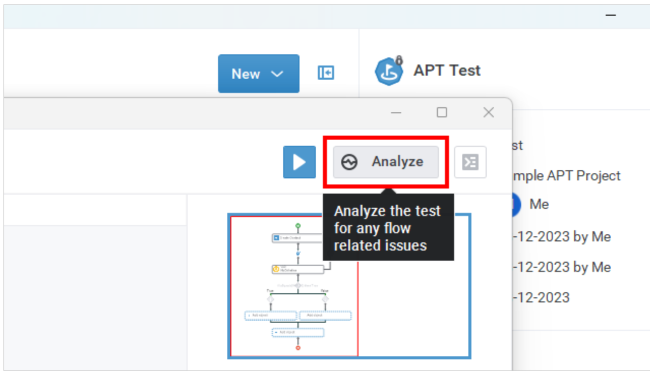
You can see the **APT Test.log** with all the filters applied.



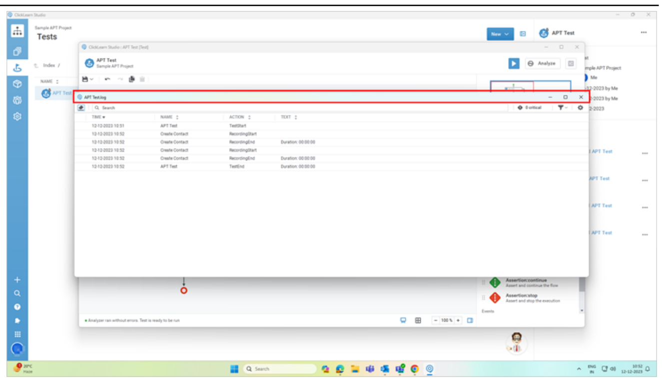
9.5. Analyze and Run the Test

9.5.1. Analyze

Analyzing the test flow for proper functioning is a prerequisite for running the test. Click on the icon: **Analyze the test for any flow-related issues.**

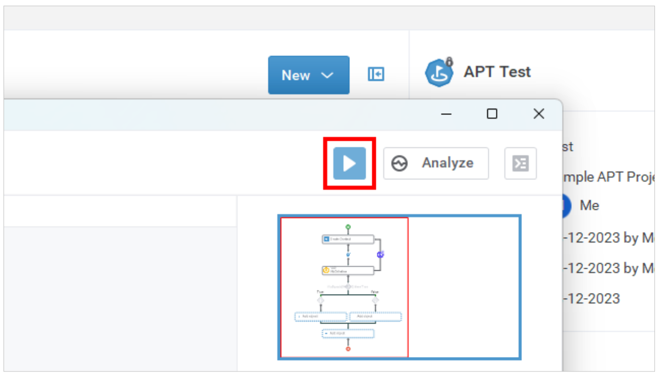


This opens up the **APT Test.log** file, which displays the complete test flow along with the errors, if any.

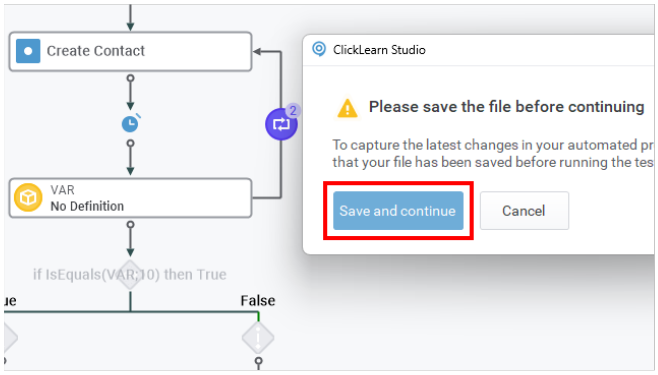


9.5.2. Run Test

Click on the button **Run Test.**



To capture the latest changes in your automated process test, ensure your file is saved before running the test. Click on the **Save and continue** button.



This is how the APT tests run.

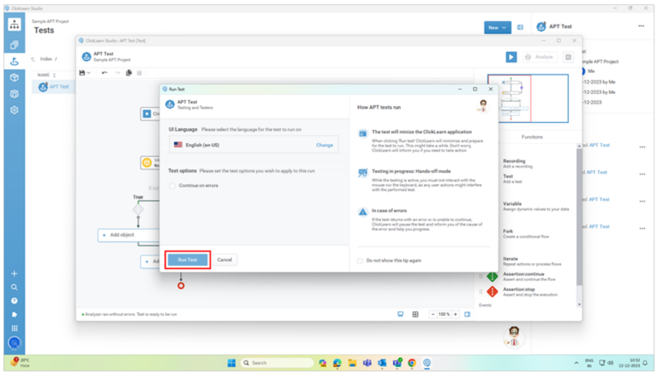
The test minimizes the ClickLearn Attain application: When clicking Run Test, ClickLearn will minimize and prepare for the test to run. ClickLearn will inform you if you need to take action.

Testing in progress: Hands-off mode: While the testing is active, you must not interact with the mouse or the keyboard, as any user actions might interfere with the ongoing test.

In case an error occurs: If an error occurs or the test cannot continue, the test stops. ClickLearn Attain guides you through the cause of the error and helps you progress.

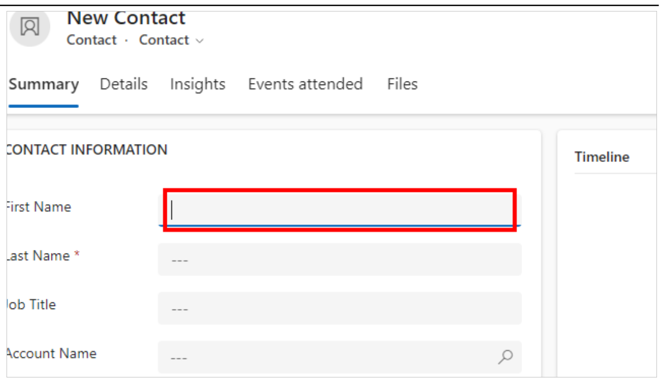
Click on the button **Run Test.**

NOTE: You must start the application before running the test.

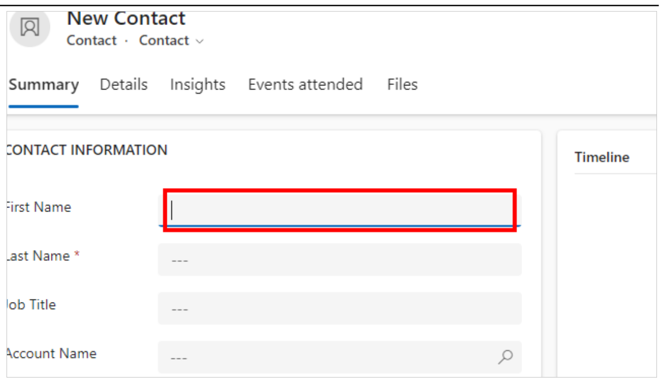


This will perform the same recording steps and enter the values assigned in the data points.

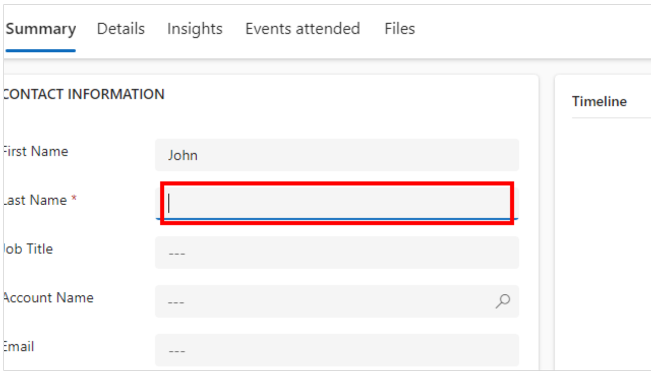
Click on the input field **First Name**.



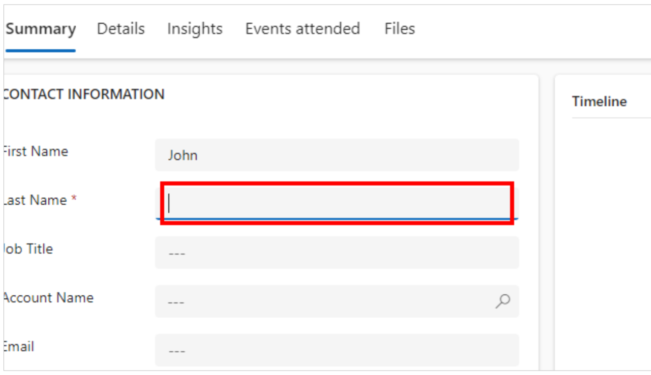
Enter **First Name**.



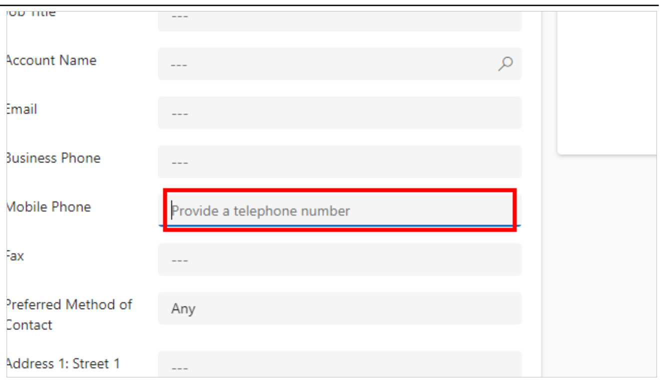
Click on Last Name.



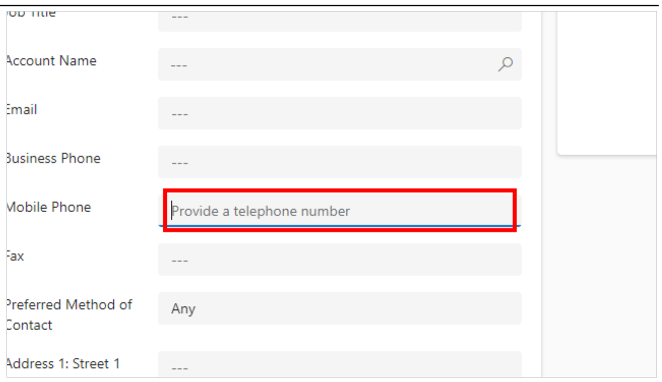
Enter **Last Name**.



Click on Mobile Phone.

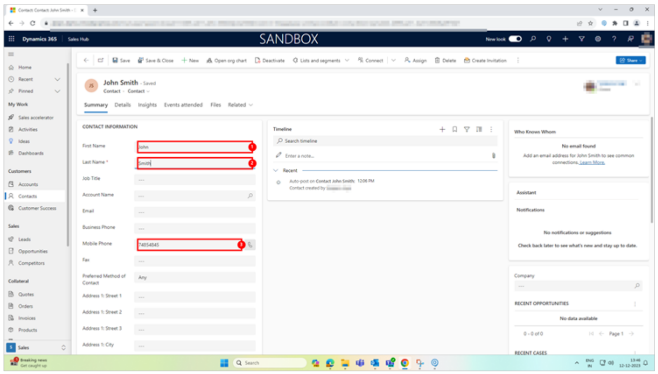


Enter **Mobile Phone**.

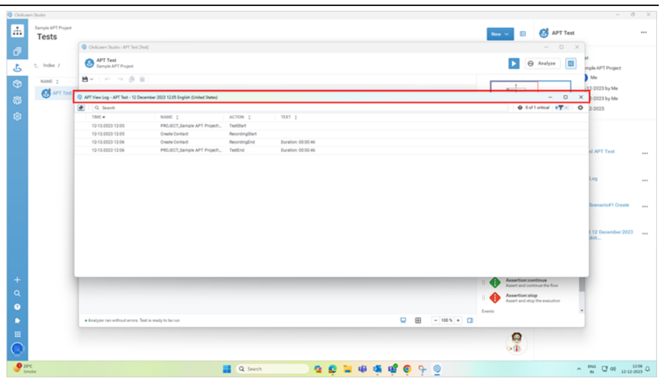


Values added in the application.
We added these values to the application from the data points we created.

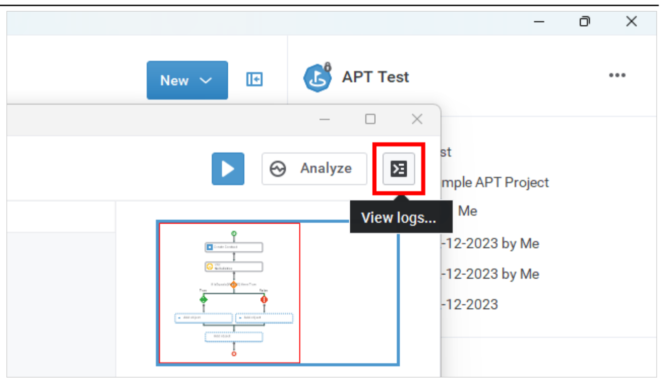
1. First Name.
2. Last Name.
3. Mobile Phone.



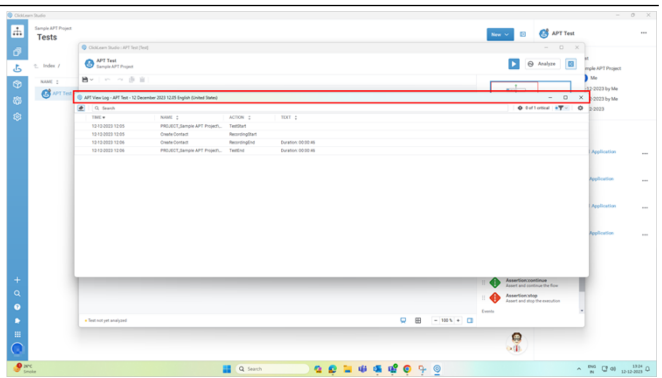
After the test is complete, it displays the **APT View Log** file.



You can also view the log files by clicking on the button **Log.**



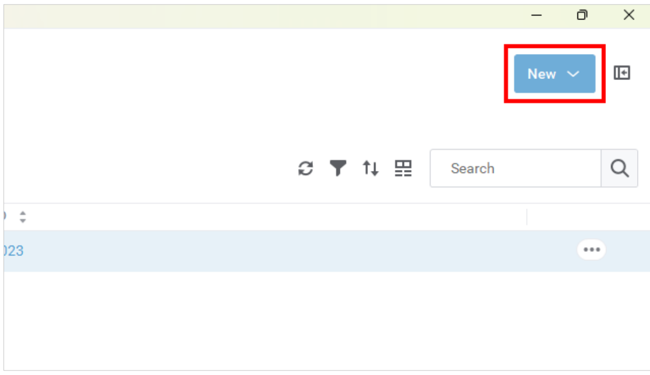
This opens up the **APT View Log** file.



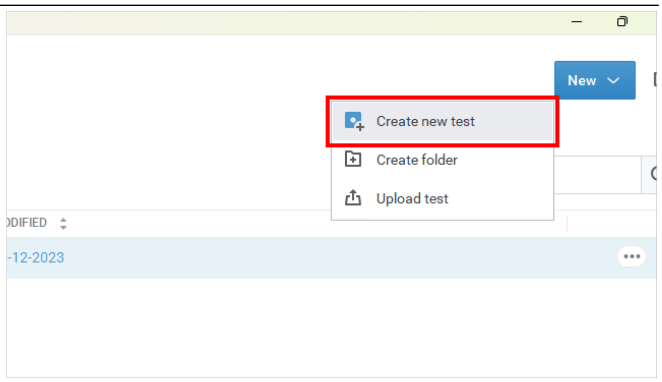
9.6. Example of APT

9.6.1. Create a new test.

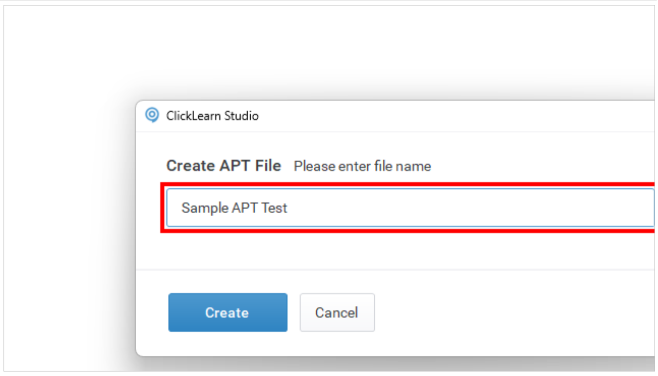
Click on the button **New**.



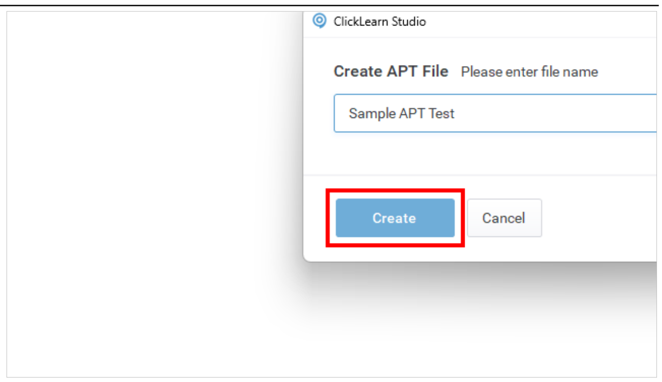
Click on the menu item **Create new test**.



Click on the textbox **Txt Rename** and enter the name for the APT File.

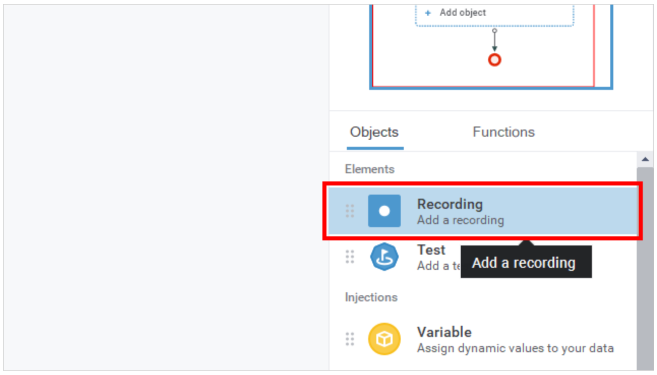


Click on the button **Create**.

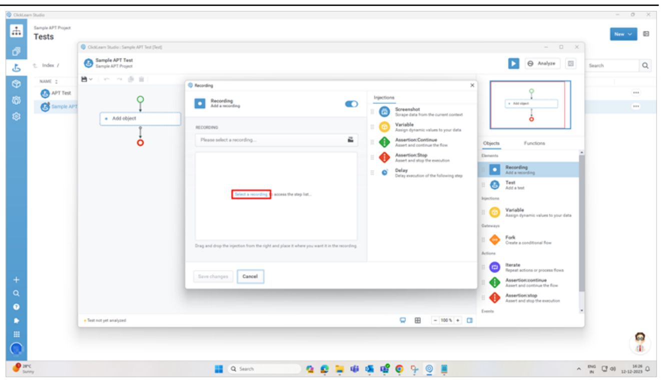


9.6.2. Process View: Adding objects to test

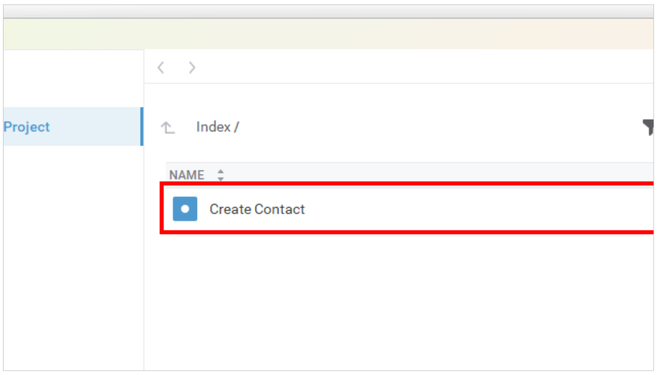
Click on the node **Recording** and drag and drop in the test panel.



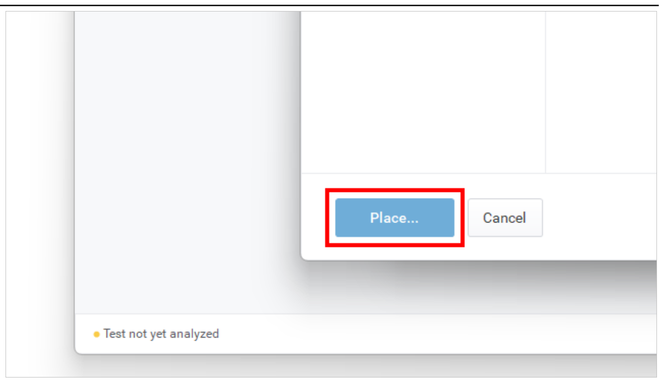
Click on the label: **Select a recording**.



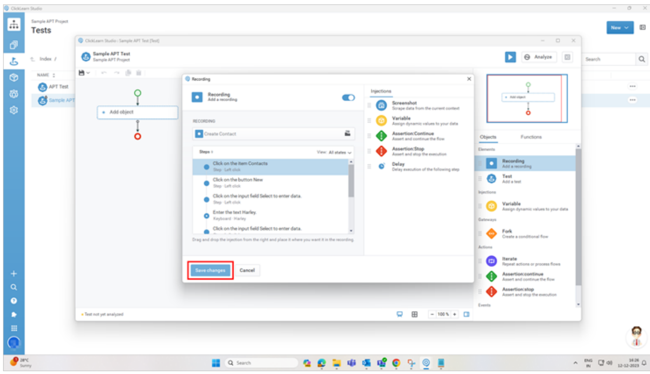
Click on the cell **NAME** with the value **Create Contact**.



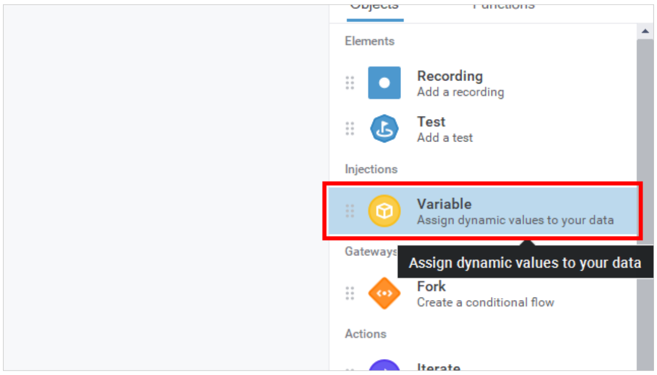
Click on the button **Place**.



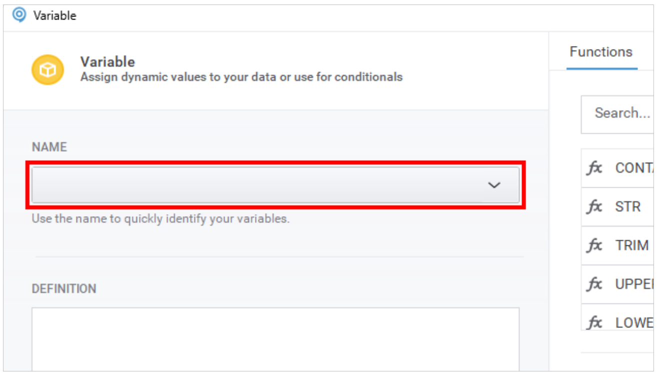
Click on the button **Save changes**.



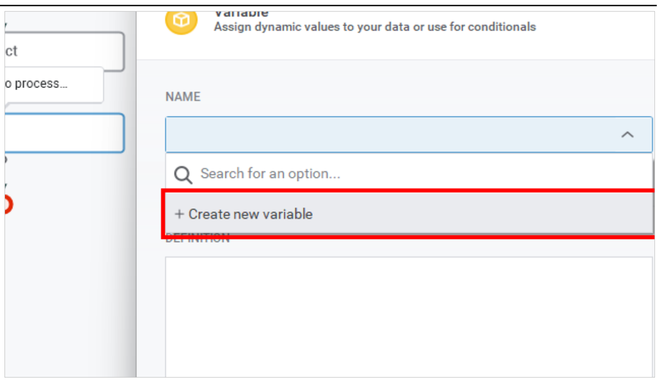
Click on the node **Variable**.



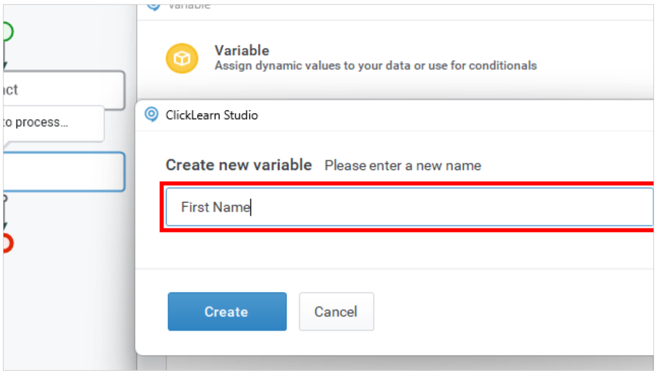
Click on the dropdown **Variable Name**.



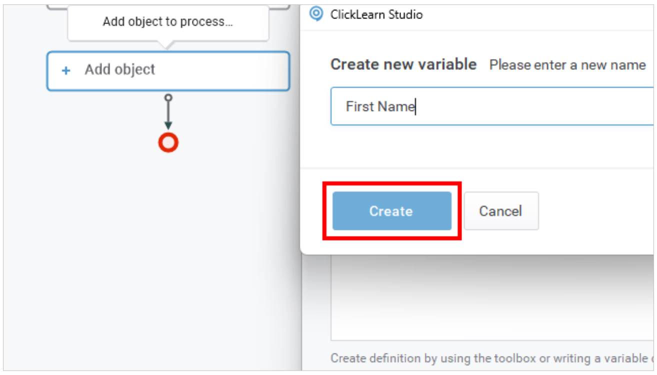
Click on the list view item: **Create new variable**.



Click on the textbox **Txt Rename** and enter the name of the variable.

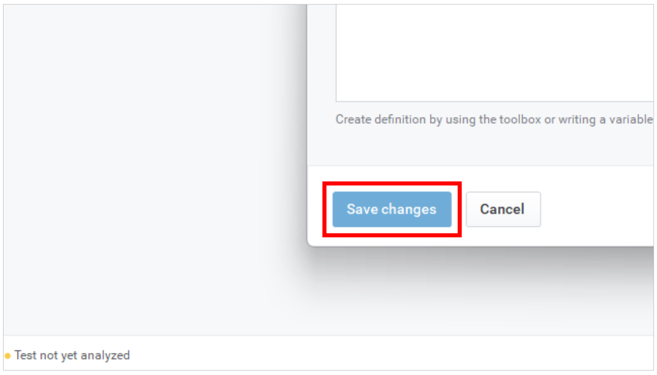


Click on the button **Create**.

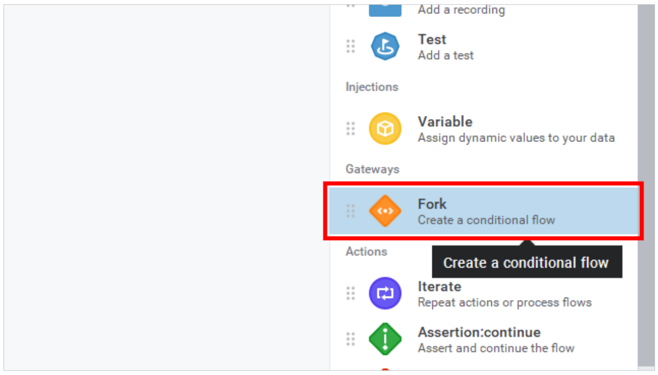


Click on the editor and enter text **Smith**.

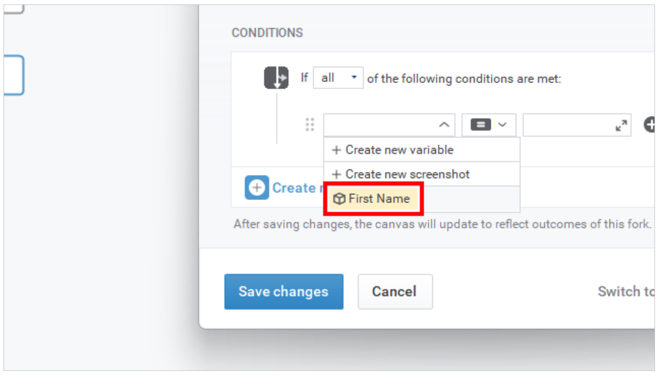
Click on the button **Save changes**.



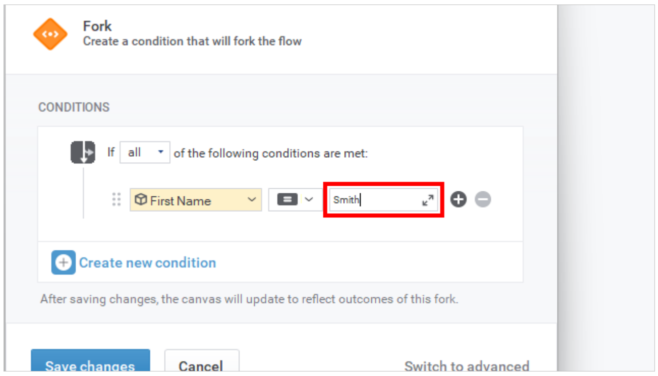
Click on the node **Fork** and drag and drop in the test panel.



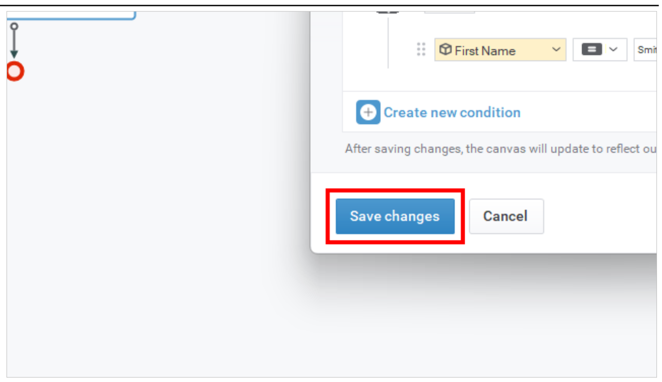
Click on the dropdown item **First Name**.



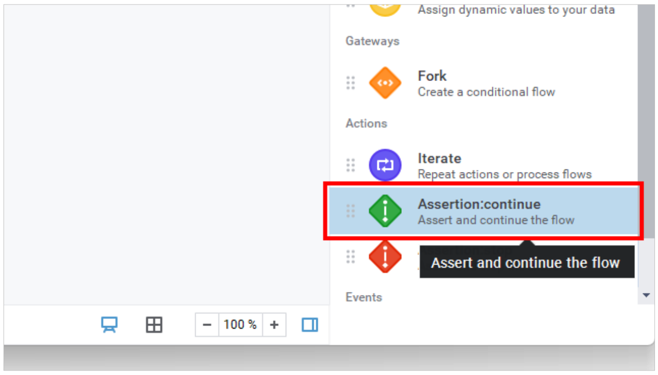
Click on the input textbox **Value** and enter text Smith.



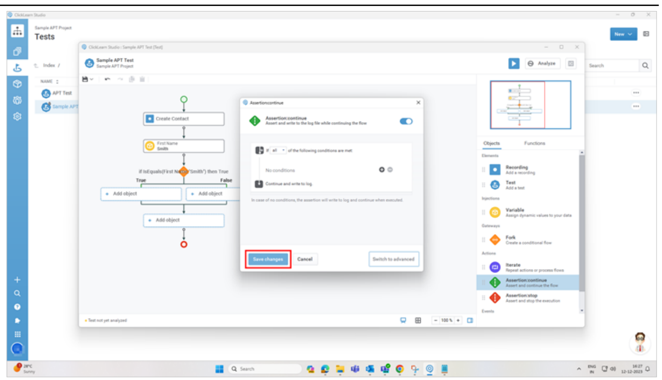
Click on the button **Save changes**.



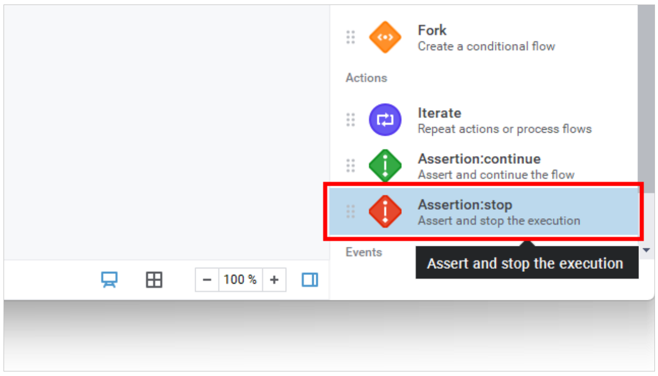
Click on the node **Assertion: continue** and drag and drop in the test panel.



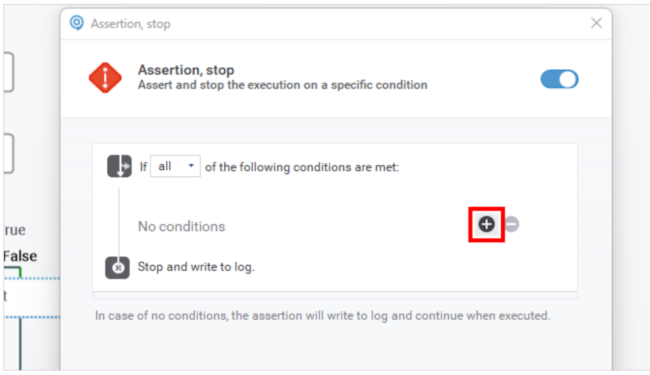
Click on the button **Save changes**.



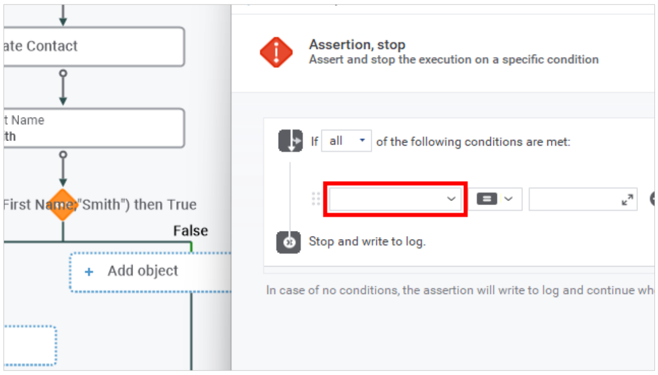
Click on the node **Assertion: stop** and drag and drop in the test panel.



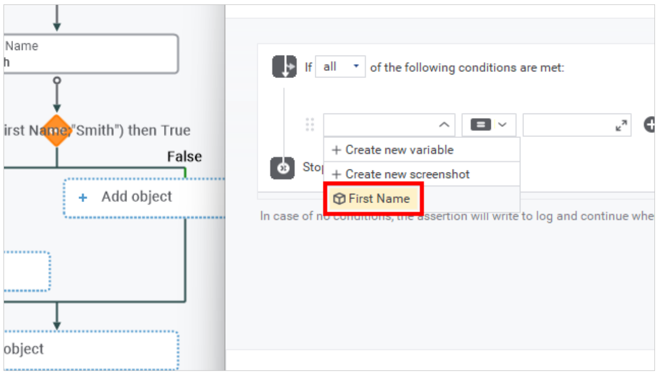
Click on the icon **Plus**.



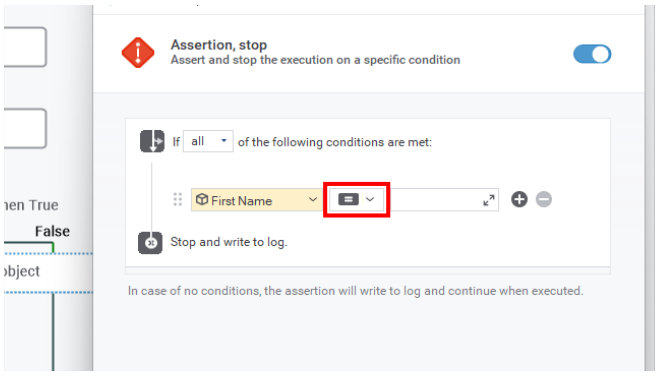
Click on the dropdown item.



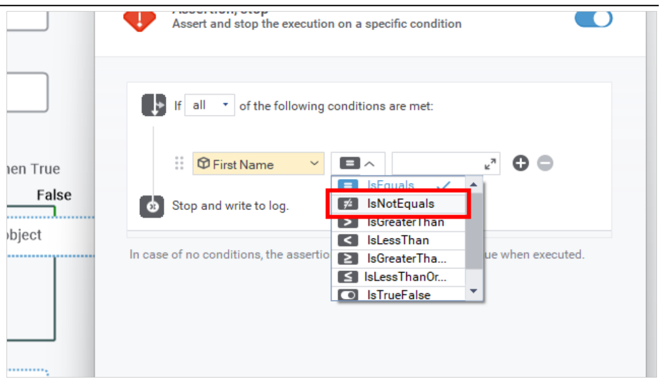
Click on the dropdown item **First Name**.



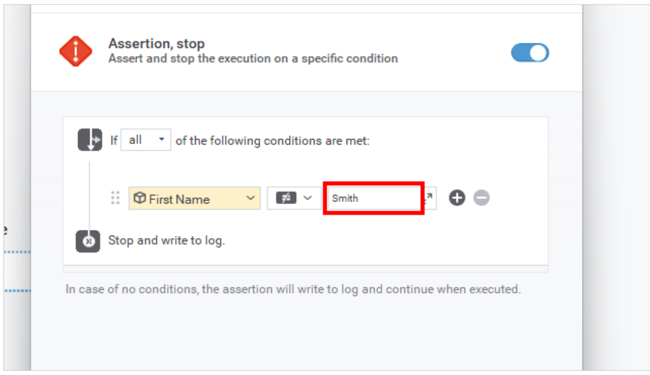
Click on the dropdown item **IsEquals**.



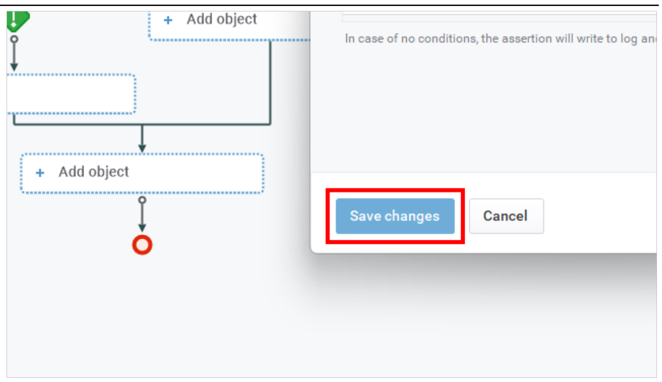
Click on the dropdown item **IsNotEquals**.



Click on the input textbox **Smith** with the value **Smith**.

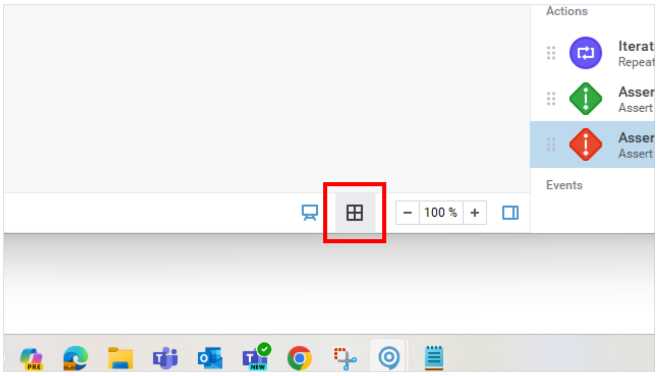


Click on the button **Save changes**.

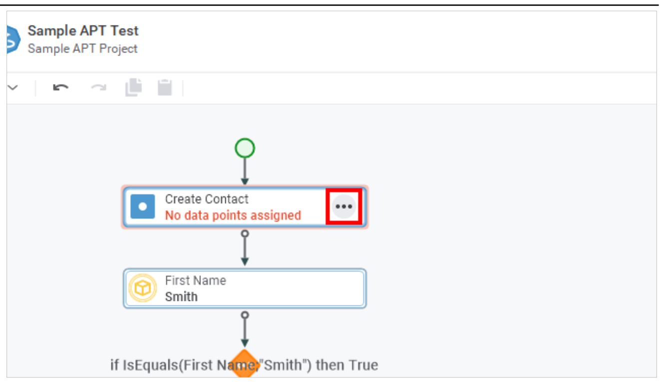


9.6.3. Data View: Adding data points to test

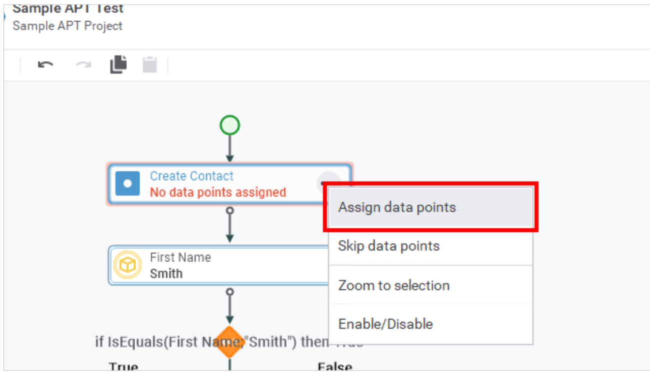
Click on the icon **Data view**.



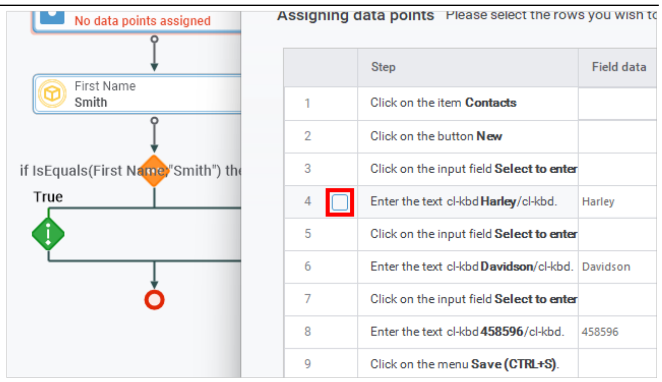
Click on the diagram element **More** with value.



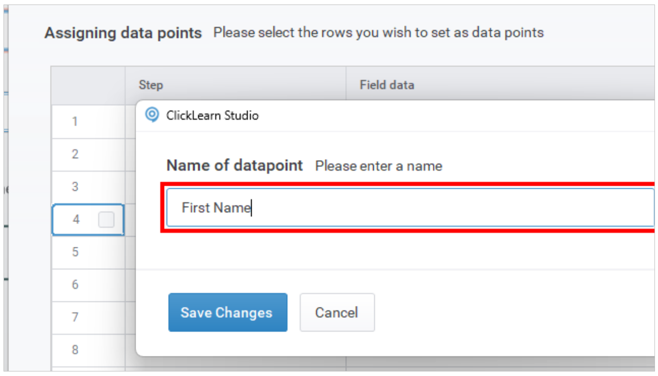
Click on the menu item **Assign data points**.



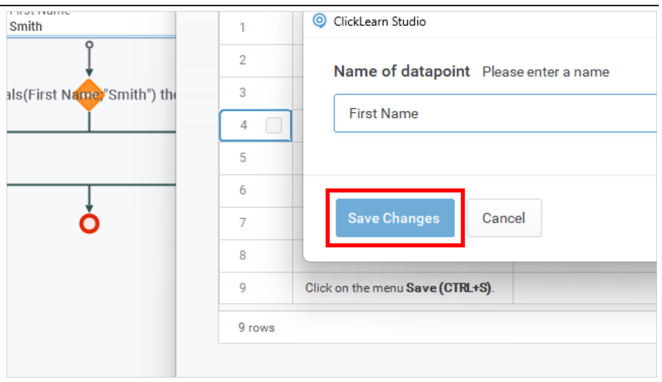
Click on the checkbox of the grid cell.



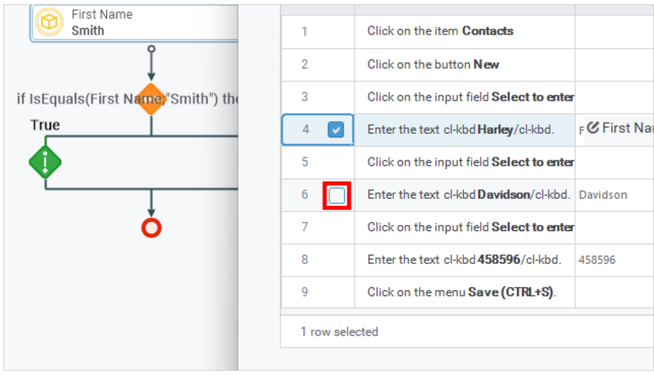
Click on the textbox **Txt Rename** and enter the name for the data point.



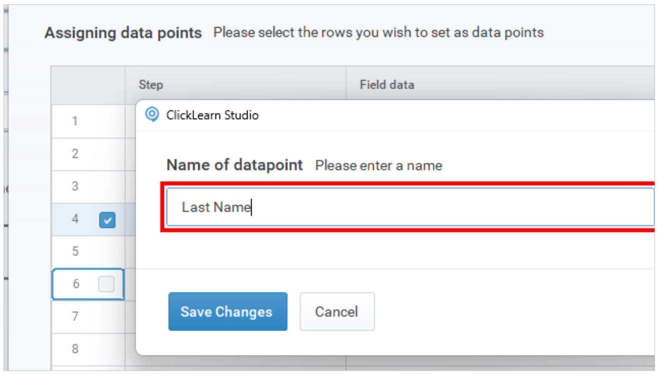
Click on the button **Save Changes**.



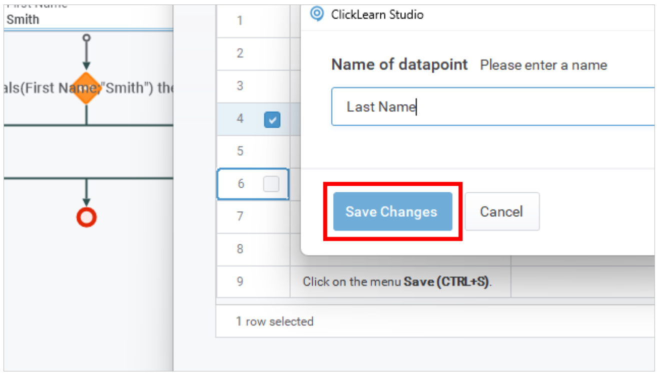
Click on the checkbox of the grid cell.



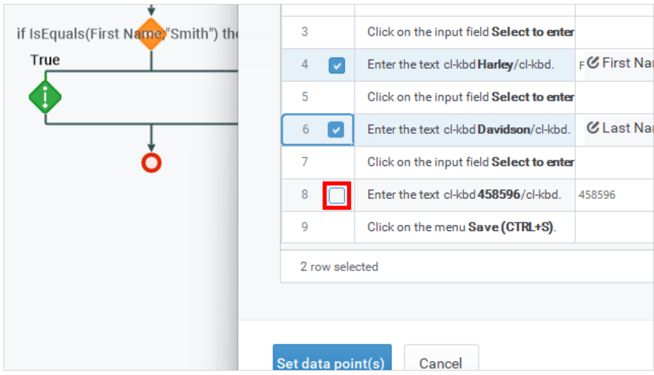
Click on the textbox **Txt Rename** and enter the name for the data point.



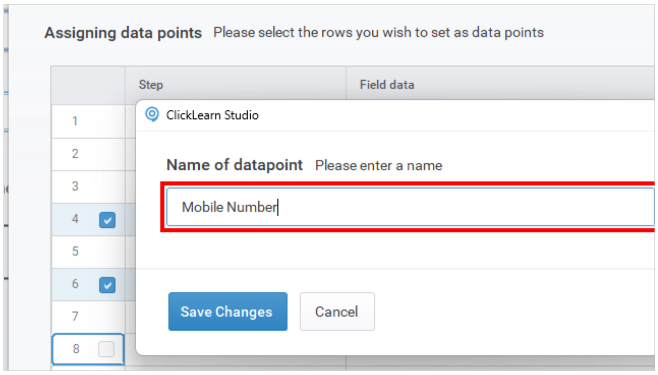
Click on the button **Save Changes**.



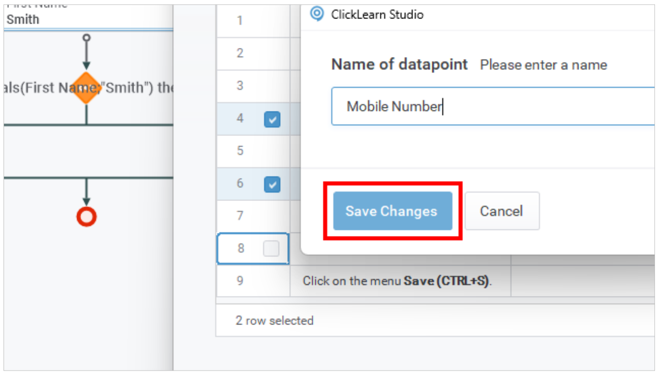
Click on the checkbox of the grid cell.



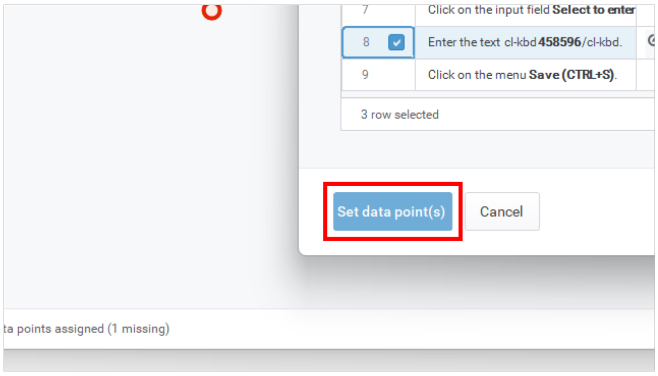
Click on the textbox **Txt Rename** and enter the name for the data point.



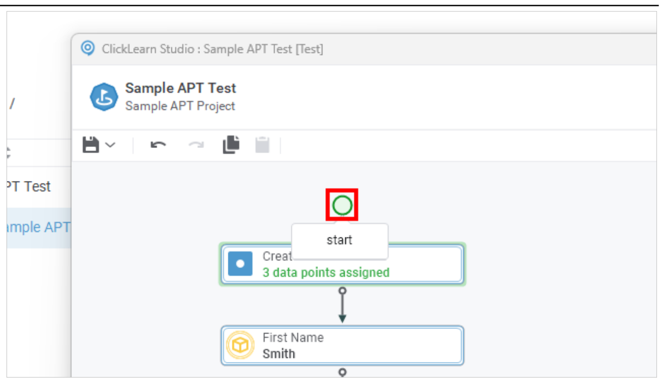
Click on the button **Save Changes**.



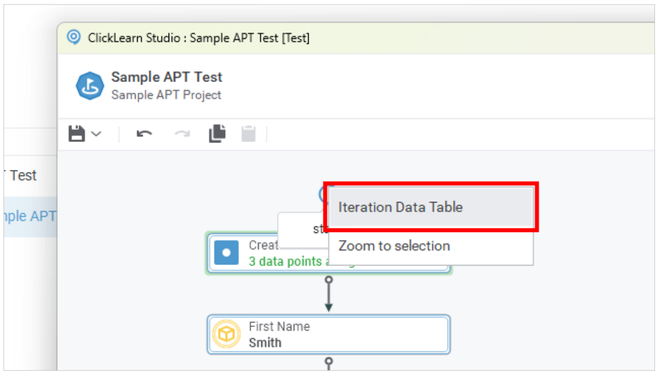
Click on the button **Set data point(s)**.



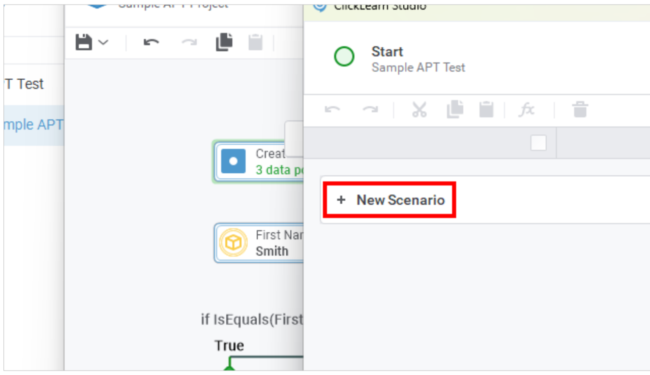
Right-click on the diagram element **start**.



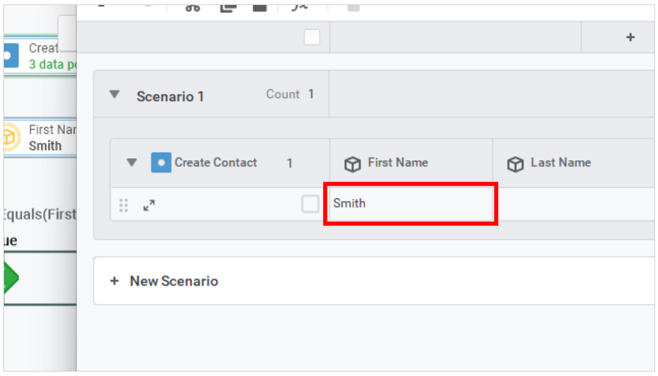
Click on the menu item **Iteration Data Table**.



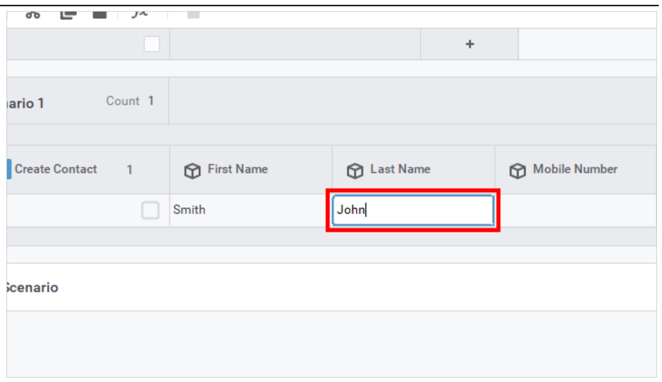
Click on the button **New Scenario**.



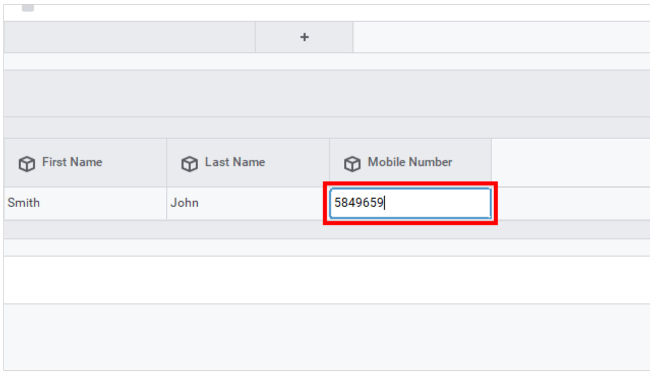
Click on the grid view cell's **First Name** and enter text.



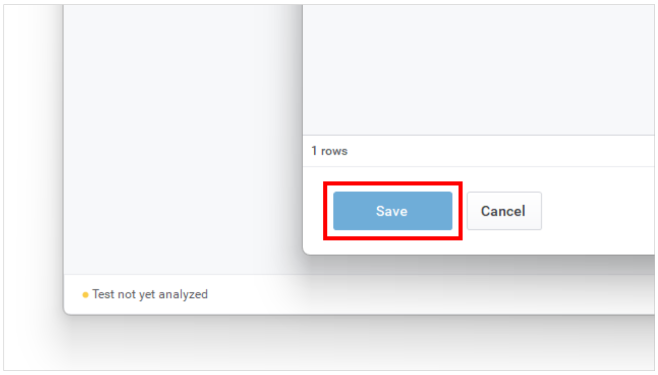
Click on the grid view cell **Last Name** and enter text.



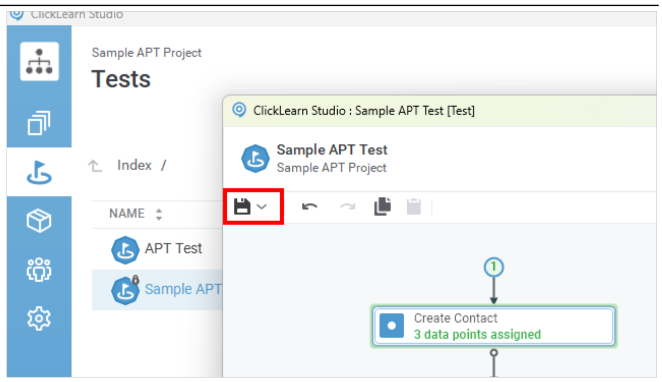
Click on the grid view cell **Mobile Number** and enter a number.



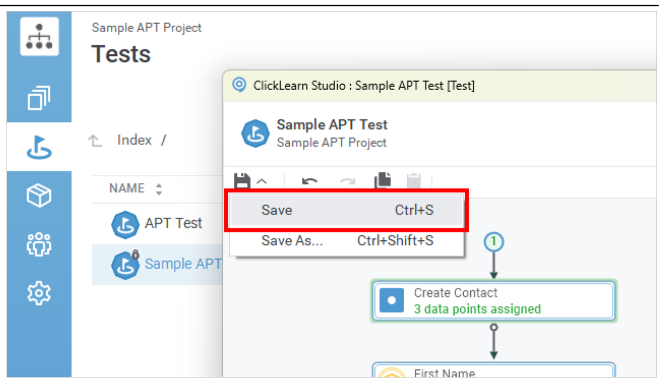
Click on the **Save** button.



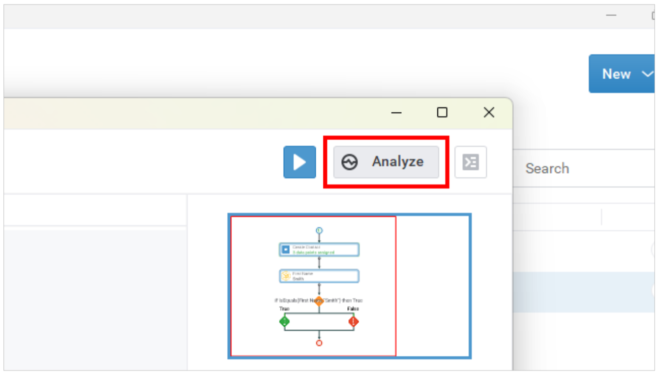
Click on the split button: **Save (Ctrl + S)**.



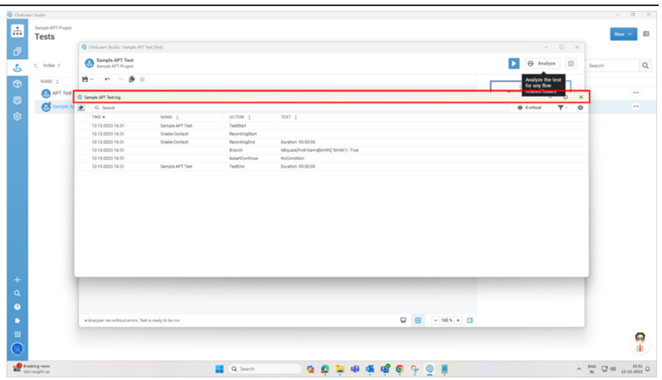
Click on the menu item **Save**.



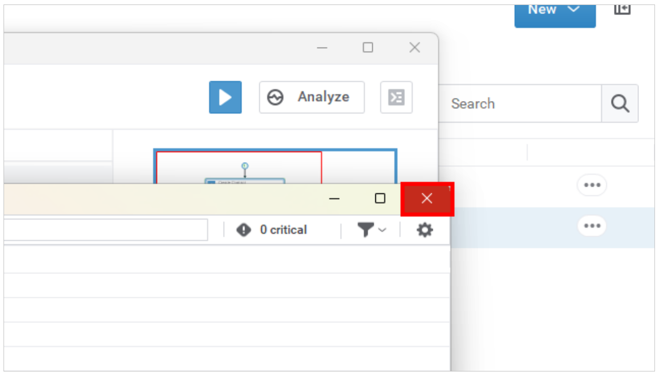
Click on the icon: **Analyze the test for any flow-related issues.**



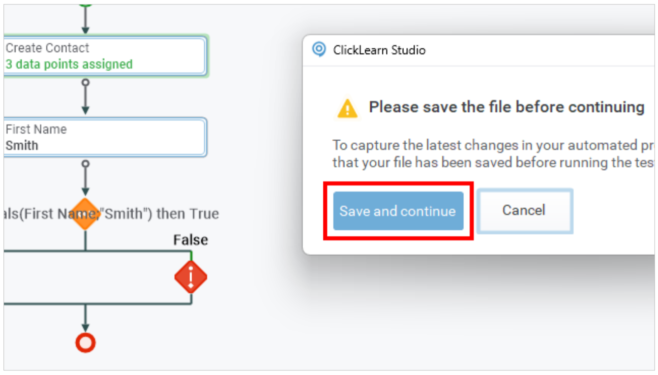
This opens up the **Sample APT Test.log** file.



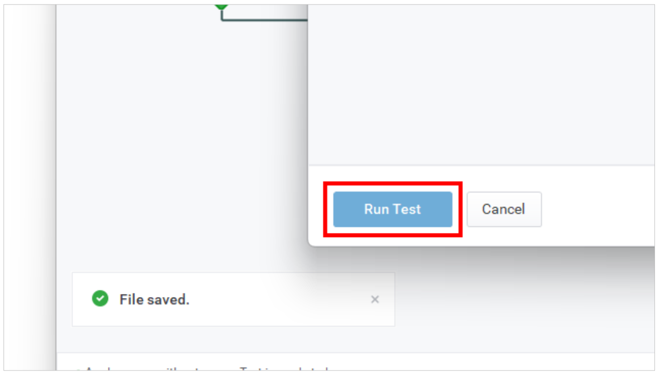
Click on the close button of **Sample APT Test.log**.



Click on the **Save and continue** button.

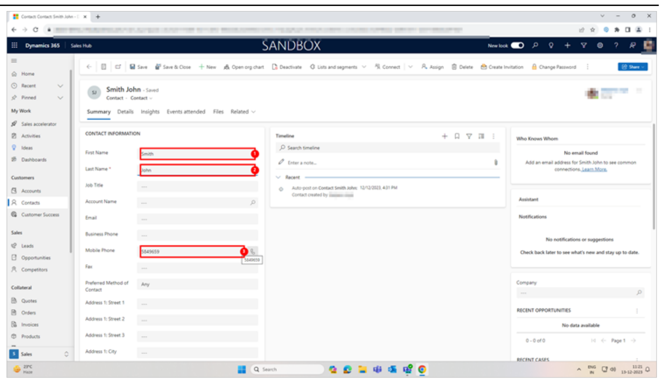


Click on the button **Run Test**.

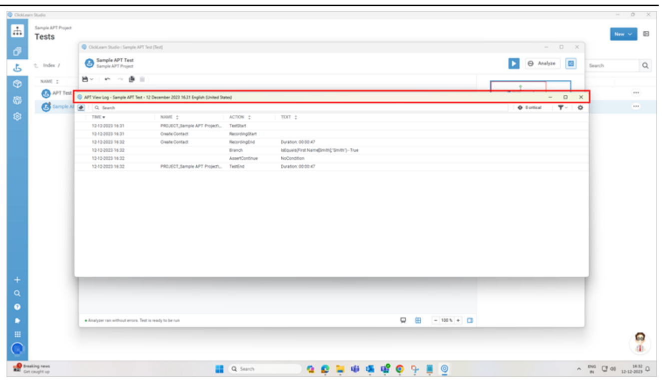


Values added in the application from the data points

1. First Name.
2. Last Name.
3. Mobile Phone.



After the test is complete, it displays the **APT View Log** file.



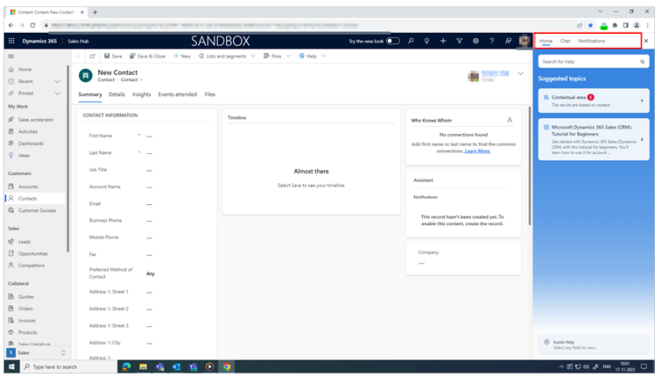
10. UXP

10.1. Overview of UXP

10.1.1. Introduction

The core function of UXP is to serve the content directly next to the application you are using. At times, there are situations where you need to read some content and then return to the application to perform the steps.

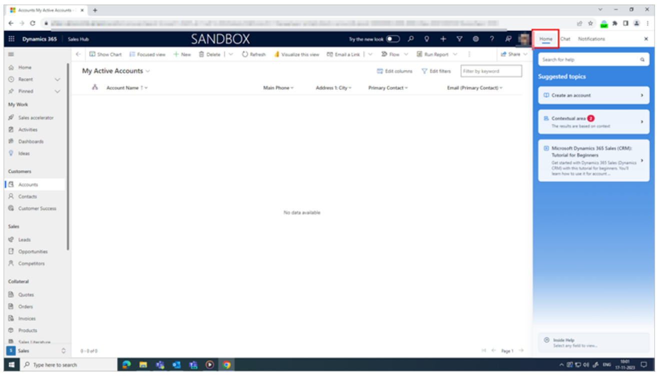
In the case of UXP, everything comes next to the application in the form of a panel, including recording, steps, etc., making it easy for the user to go through the steps and perform them simultaneously. This is what the UXP panel looks like.



10.1.2. Types of tabs in UXP and its features

10.1.2.1. Home

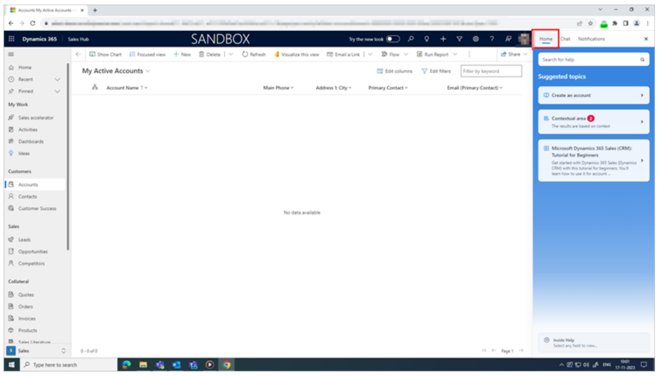
Based on your configuration in ClickLearn Attain, you can see the recordings and sources in the **Home** tab depending on the option you select from the application.



10.1.2.1.1. Contextual Search

The search box helps you to search the configured content with the option you select from the application. The search results depend on where you are in the application. We call this the contextual search, and this is how it works. We have two contexts in the UXP Panel.

- User context
- App context

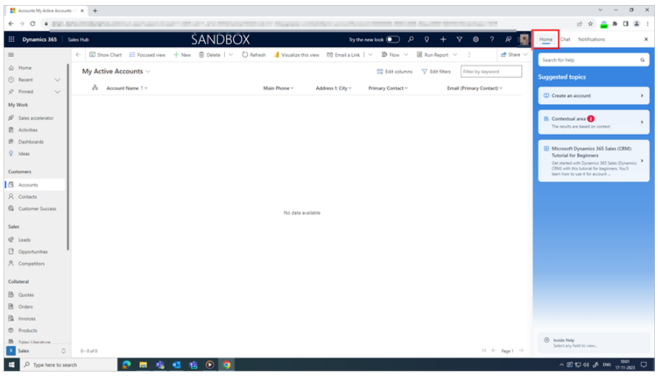


10.1.2.1.2. Contextual Area

It displays suggested topics based on the field you have selected in the application.

In the application you are using, in this case, we are using attain demo; if you are in the accounts sections, it will display recordings related to accounts. If you are in contacts, it will display recordings related to contacts.

Also, you can see the JSON files based on your configuration.

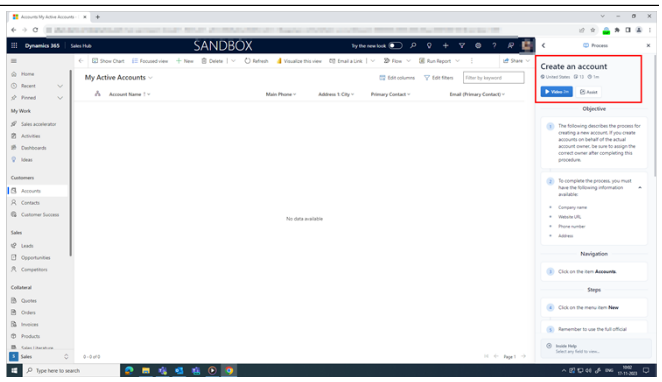


When you click on the recording, it will show the steps listed in the recording along with two options.

- **Video:** This plays the video of the recording you selected. If you click this, a video of the recording starts.
- **Assist:** This starts the Assist, which will take you through the steps.

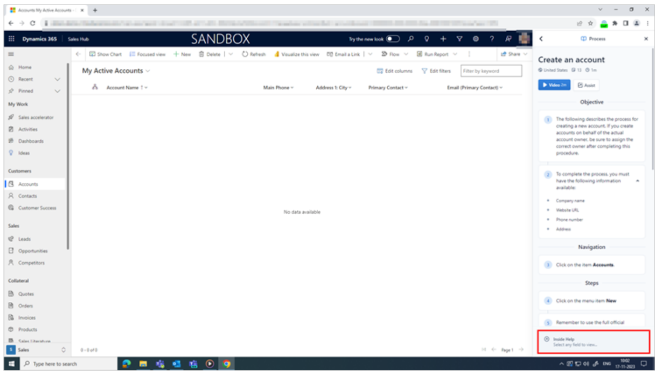
Also, if you want to go directly to a particular field, click on the step that will take you to that field.

NOTE: You can also jump over to steps that redirect the Assist to that particular step.



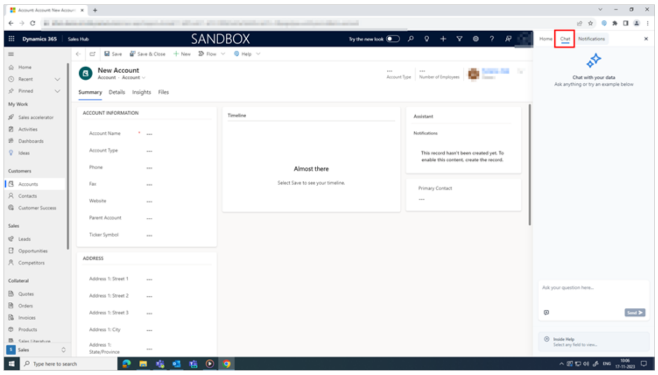
Inside Help: This will display what precisely the field represents. For example, if you select the field first name, it shows what precisely the field represents. You can use 50 characters, this is a first name, etc.

This is based on your configuration in the Inside Help project in ClickLearn Attain, which contains the field details.

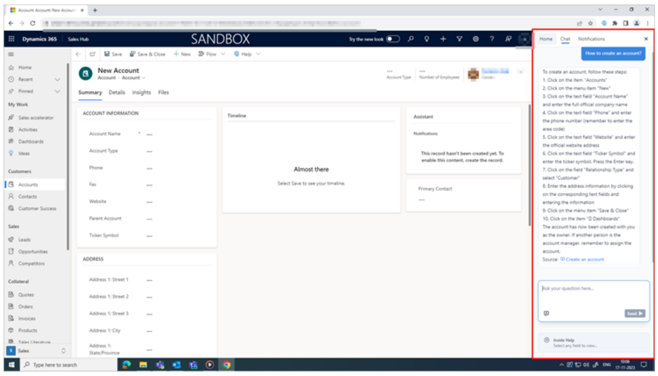


10.1.2.2. AI Chat

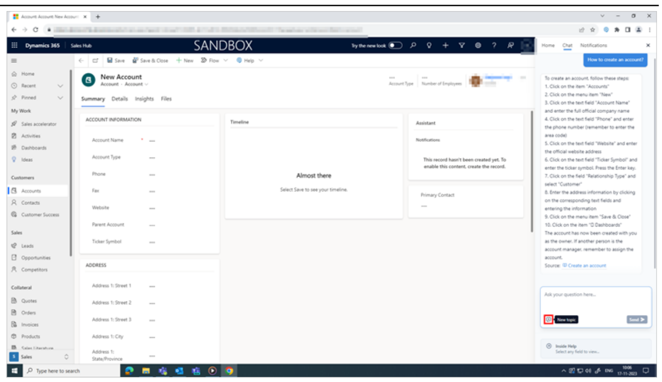
This is the **Chat** tab. From the ClickLearn Attain, we can configure the sources we provide here, comprising PDFs and recordings. The sources we have configured will determine the results. You can type the question in the text box below and click Send.



For example, in this case, we asked, "How to create an account." If you have sourced the recording of creating an account, it will display the steps to create an account along with the sources. If the recordings are not sourced, it shows a message like it does not have any information. So it would be best if you reconfigured it, and then it displays the answer to that question.
Along with the steps, it also displays the sources. The link redirects you to the recording, which helps you to hover on any steps.

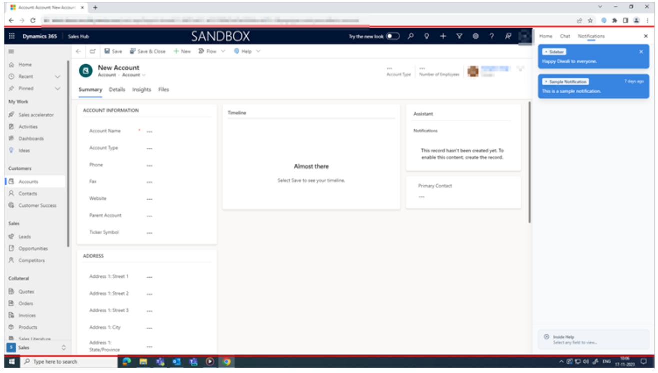


New Topic: This clears the previous chat, and you can start with the new topic.



10.1.2.3. Notifications

There are different types of notifications you can create in ClickLearn Attain. It will show all the notifications that you receive.

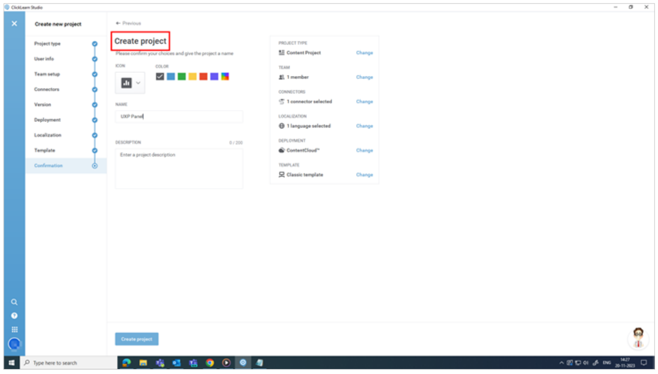


10.2. Project requirements and Segmentation for UXP panel

10.2.1. Introduction

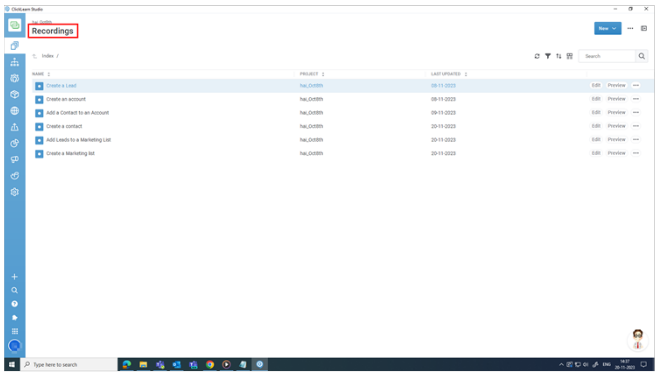
Create project: The basic requirements for the UXP are creating a content project or an InsideHelp project. Start by creating and segmenting the recordings.

Start by creating a **Content** project.



10.2.1.1. Recordings

When you create a new project, there are no **Recordings**. There are two options to add recordings to your project. You can choose to start a recording, or you can directly import the recordings from other projects.

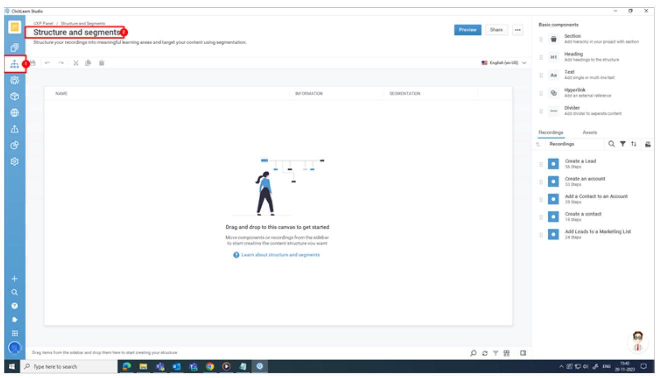


10.2.1.2. Structure and segments

Structure and segments

1. Click on the button **Structure**.
2. **Structure and segments:** You need to structure and segment your recordings to use them as a source in the UXP panel.

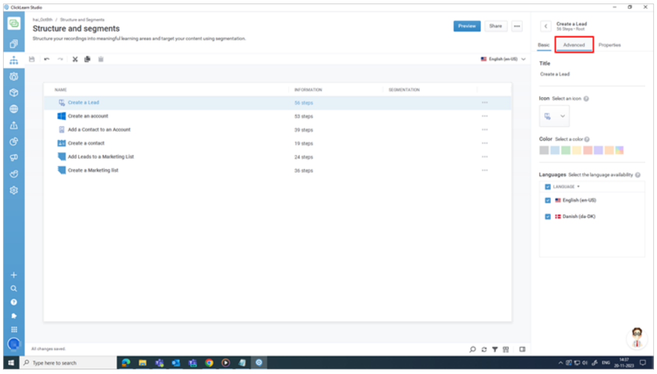
   Select and drag and drop the recordings you wish to include in the structure.



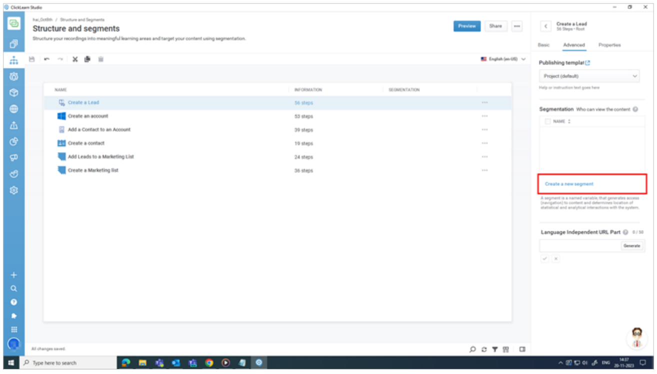
10.2.1.2.1. Segmentation

Add segmentation to your recordings based on user groups to target specific users. So, the users will have access to only that particular recording's content. If you assign a segment to a recording and do not map it in UXP, users cannot see those recordings in UXP.

To create a segment, select the recording and click on **Advanced**.

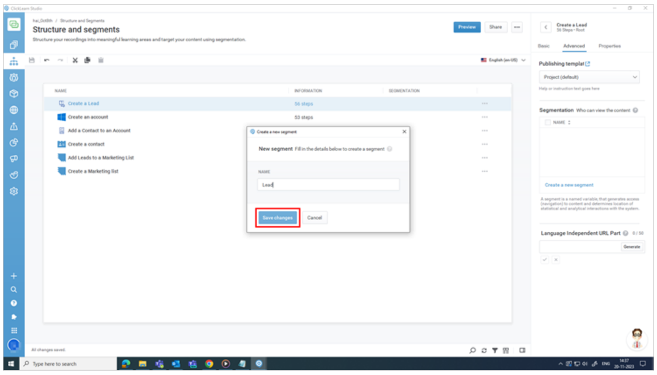


Click on the button to **Create a new segment**.

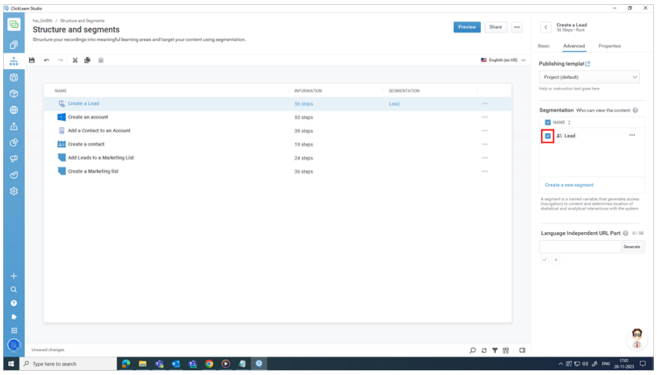


This pops up with a new dialog box to create a new segment. In our case, we have created a **Lead** as a segment. Based on your project needs, you can create segments accordingly.

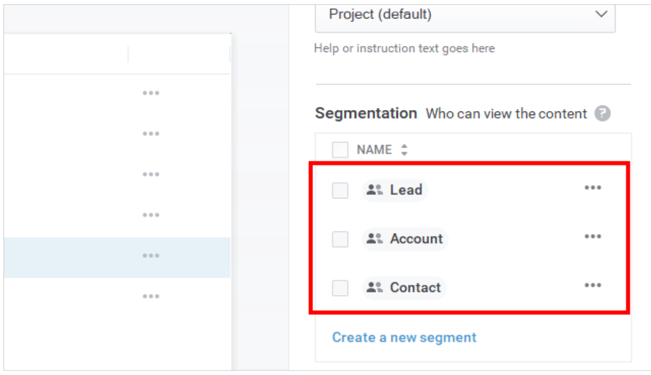
Click on the button **Save changes**.



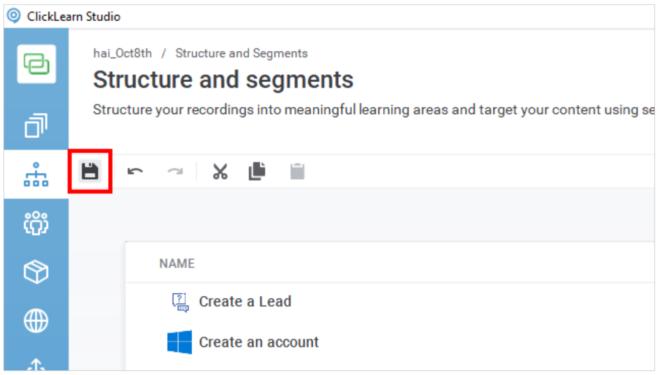
Click on the **checkbox** associated with the segment you created. It will include the recording you selected.



Similarly, we will create three different segments and assign the recordings accordingly.

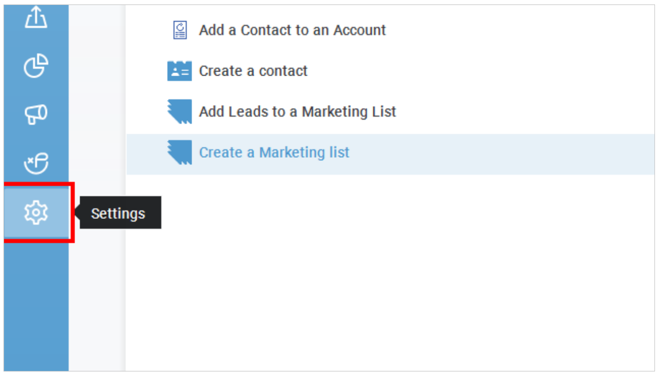


Once your segmentation is complete, click on **Save**.

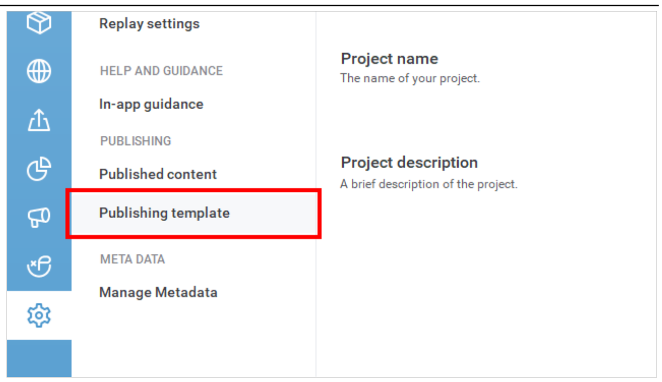


10.2.1.3. Enable UXP

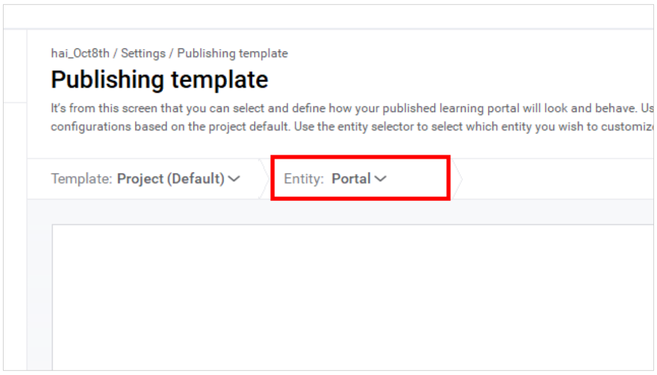
To enable the UXP, click on the button **Settings**.



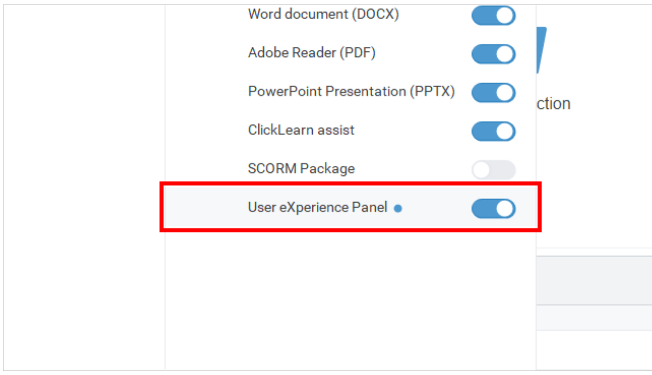
Click on the button **Publishing template**.



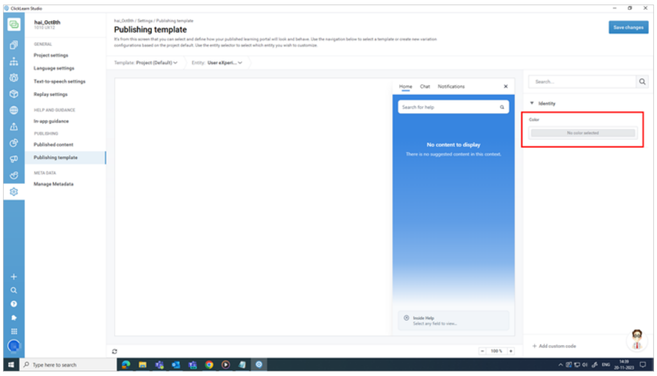
Click on the **Entity** button.



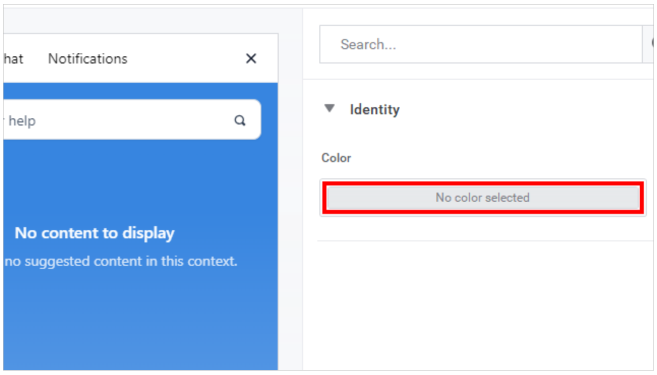
Enable the option **User Experience Panel**.



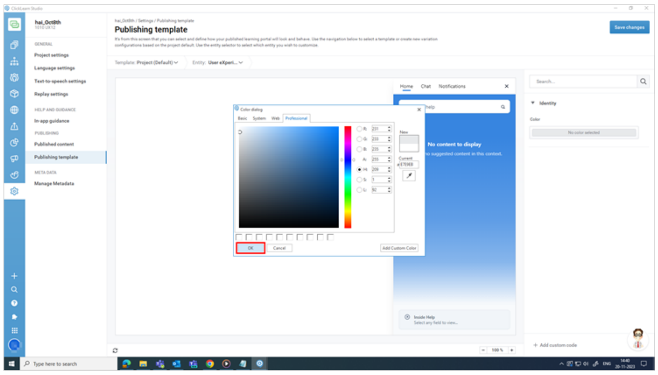
This is precisely how your panel will look in the application. Identity has a component color, which allows you to modify the panel's color according to your requirements.



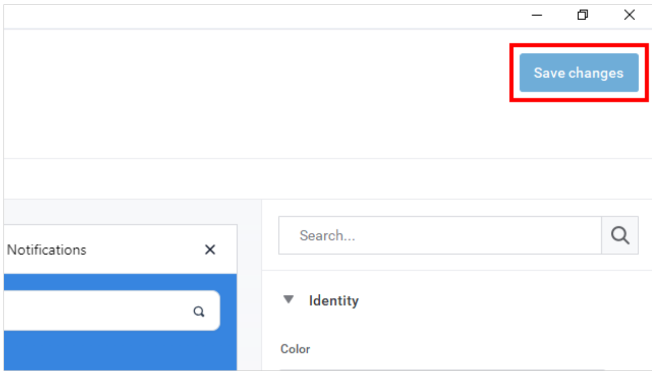
Click on the label **Color**.



This pops up with a new color dialog box. Pick the color you want for the UXP panel and click **OK**.



Click on the button **Save changes**.

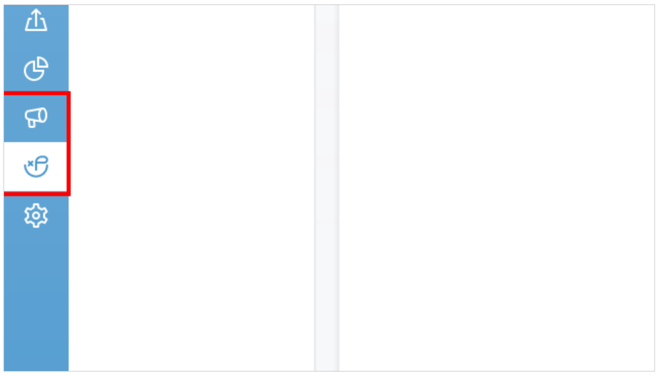


10.3. Getting Started with UXP Configuration

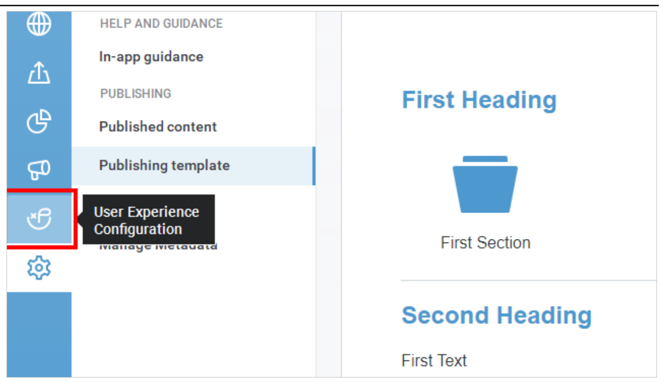
10.3.1. Introduction

Two new tabs appear when you enable the User Experience Panel.

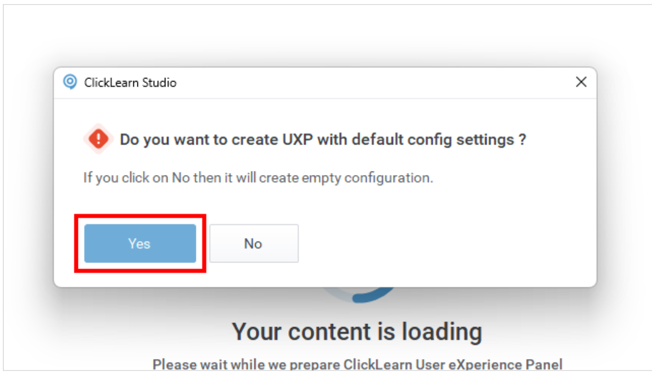
- **Notification:** This allows you to configure the notifications tab.
- **User Experience Configuration:** This will enable you to configure the UXP panel.



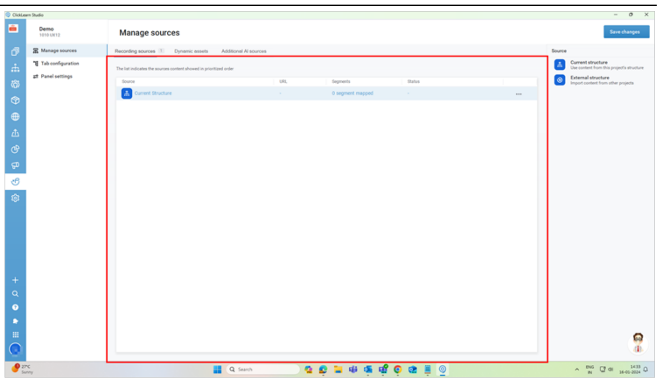
Click on the button **User Experience Configuration**.



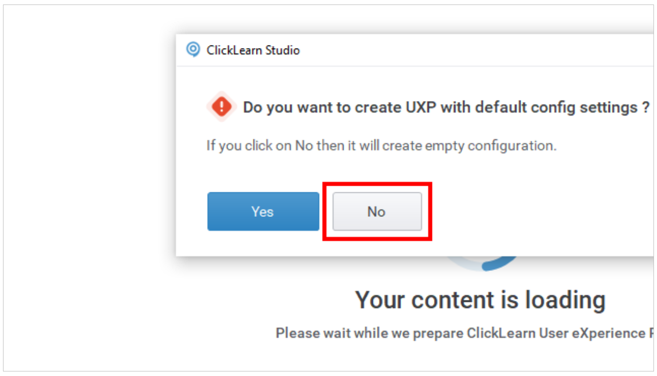
A new dialog box appears, asking if you want to use the default config settings for UXP. You can decide yes or no based on your project requirements.
If you choose Yes, you will see a default configuration. Click on the button **Yes**.



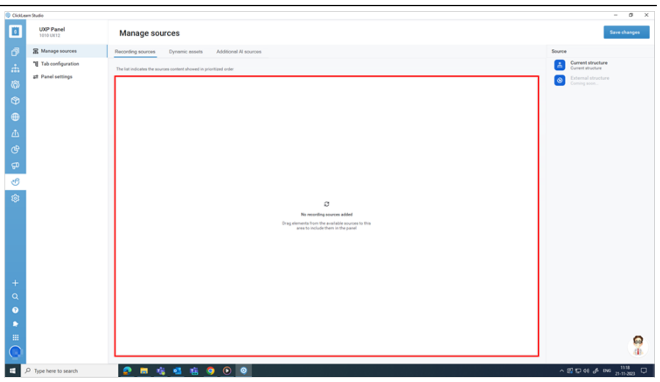
The screenshot shows that the Current Structure is pre-configured. The tabs are also configured along with the recording sources.



If you choose No, you will start with an empty configuration and have to create everything yourself. Click on **No**.

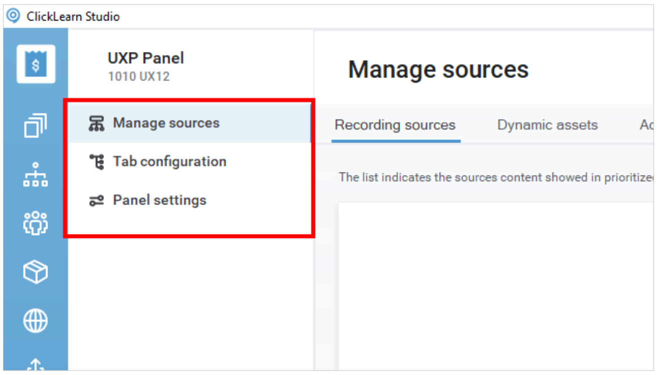


This opens a blank configuration.



We have three tabs here.

- **Manage sources:** This tab allows you to manage all your sources. So, the UXP panel will have a source. This tab configures the source of information that will provide the information to the end users.
- **Tab configuration:** The tabs on the UXP panel are configured from this tab.
- **Panel settings:** Enter the application ID of the app where you want the User Experience Panel to be active.



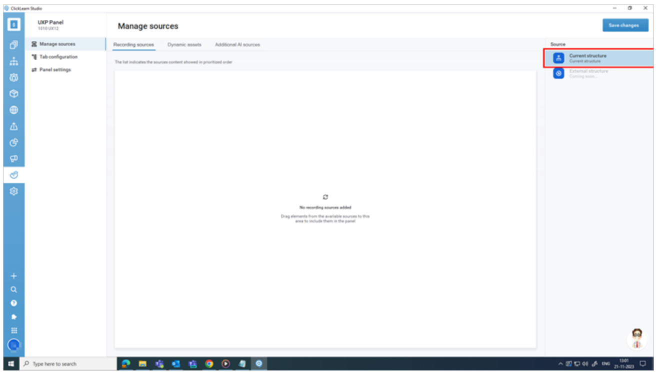
10.4. Manage Sources

10.4.1. Recording Sources

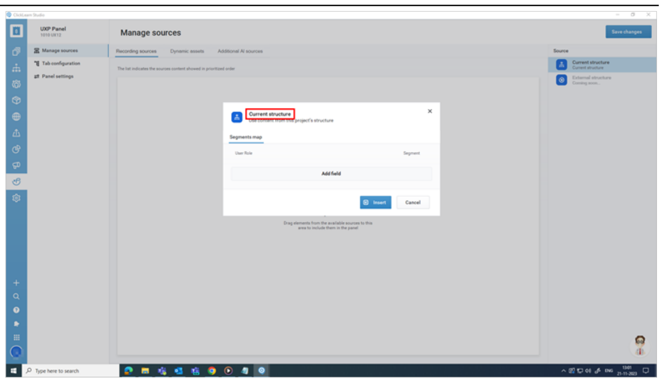
10.4.1.1. Recording Sources and Manage User Roles

10.4.1.1.1. Recording Sources

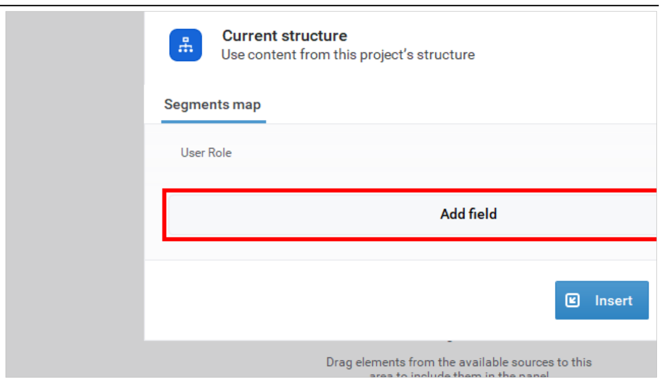
Recording sources offer two options. One is the current structure, and the other is the external structure. So, to begin with, we will start with the current structure. Select the **Current structure** and drag and drop it in the empty panel.



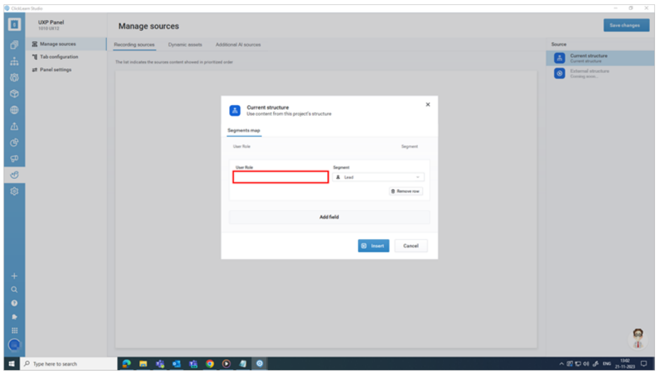
This opens up a new dialog box, **Current structure,** where you must map your segments. You can map your segments according to the user role.



Click on the button **Add field**.



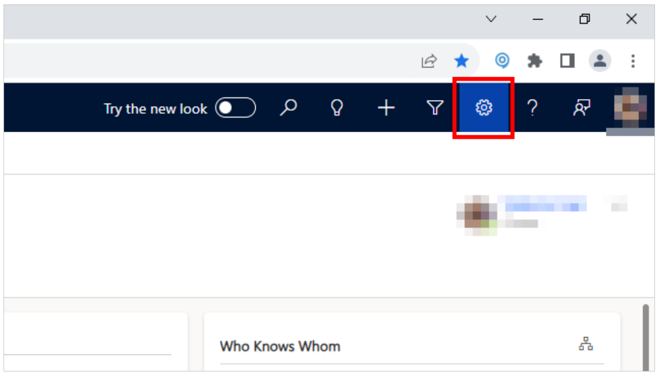
NOTE: Before adding the User **Role** in the field, you must know the user roles in your application.



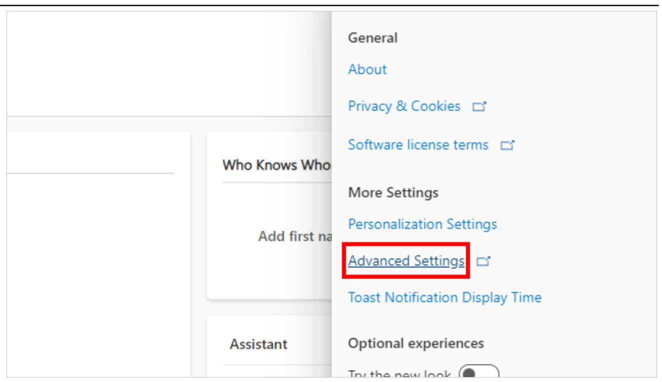
10.4.1.1.2. Manage Segments

10.4.1.1.2.1. Example to find User Role in customer engagement system

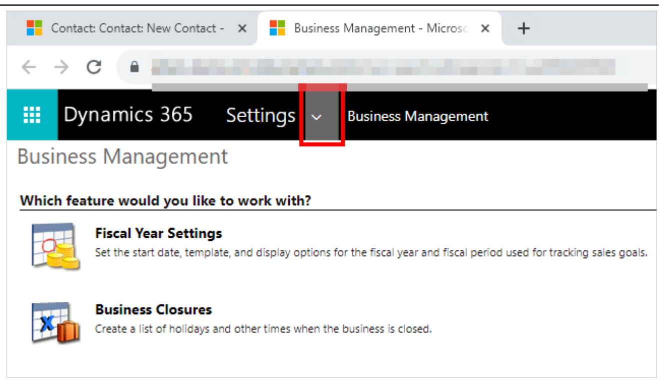
To check the user roles in the application, click on **Settings**.



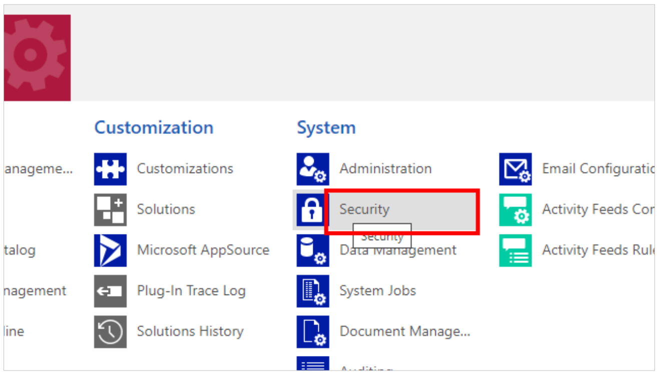
Click on the **Advanced Settings** button.



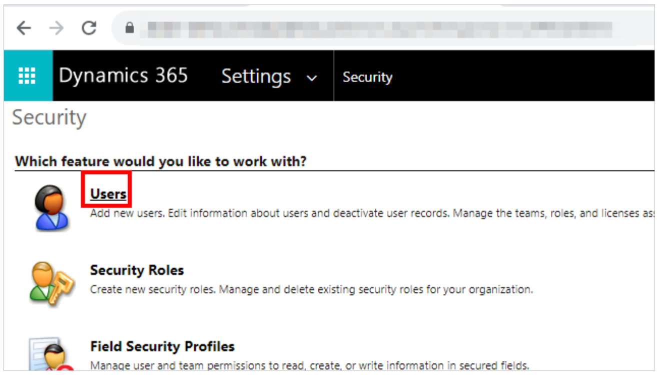
Click on the drop-down **arrow**.



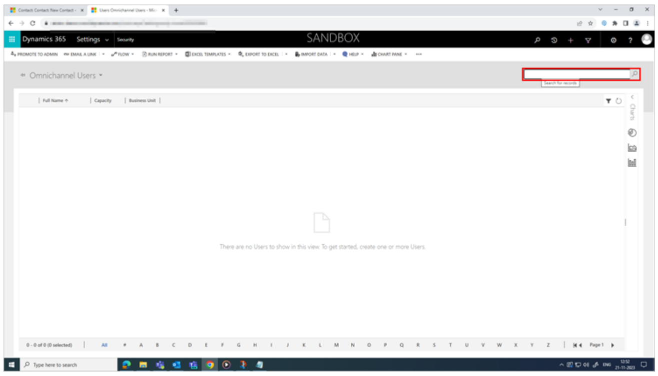
Click on the option **Security**.



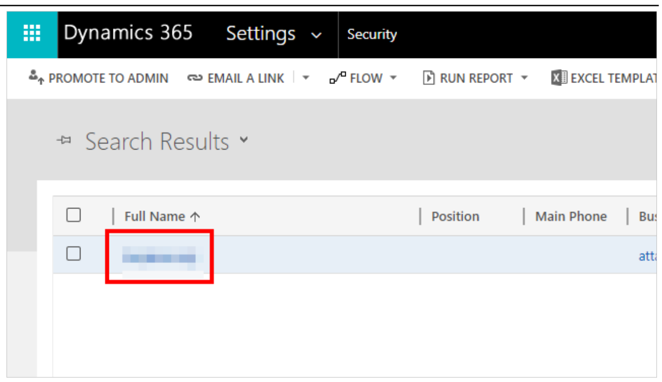
Click on the link **Users**.



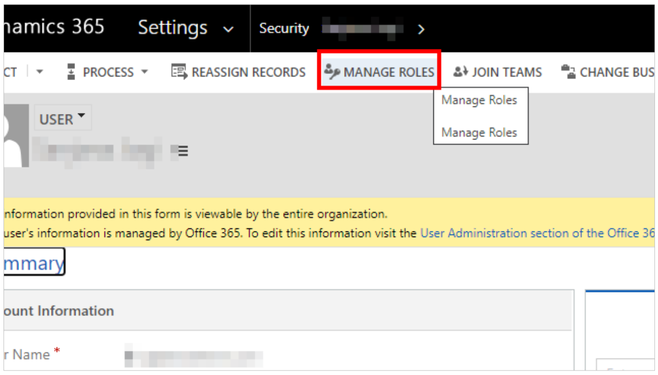
Click on the **search box**, type in the user name, and click search.



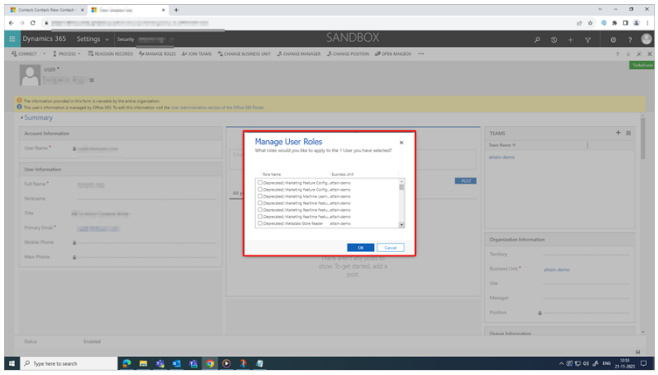
Click on the **user name** displayed in the search results.



Click on **MANAGE ROLES**.



This opens up a new dialog box, **Manage User Roles,** that displays the list of user roles in the CRM. These are the roles we are assigning to each Segment.



10.4.1.1.2.2. Segment Mapping

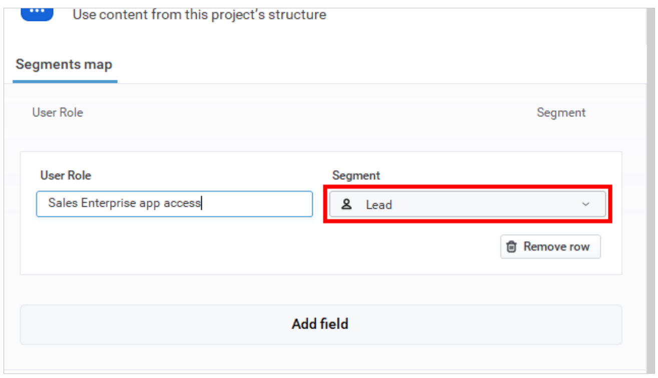
There are two components while mapping your segments.

User Role: These are the user roles present in the CRM.

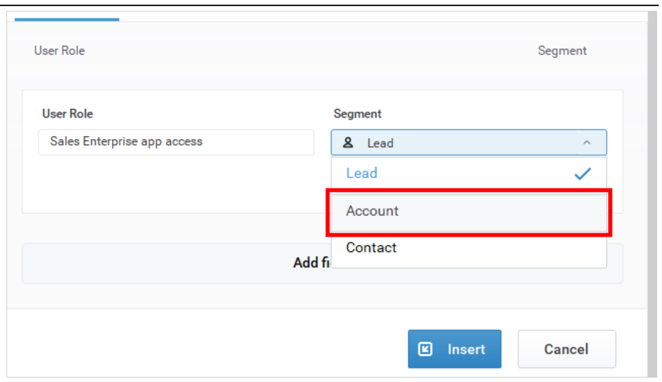
Segment: These are the segments that we created in the structure.

NOTE: You need to type the user roles manually. Make sure there are no spelling mistakes. Enter them in the same case as they exist in the CRM. Every time you add a user role, you must manually enter it.

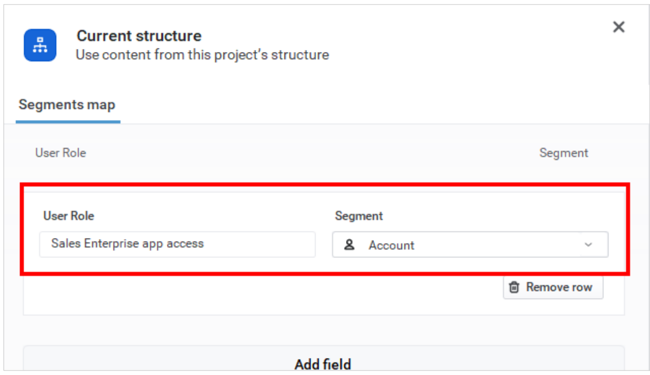
Type the user role and click on the drop-down **Segment**.



Click on the drop-down item **Account**.

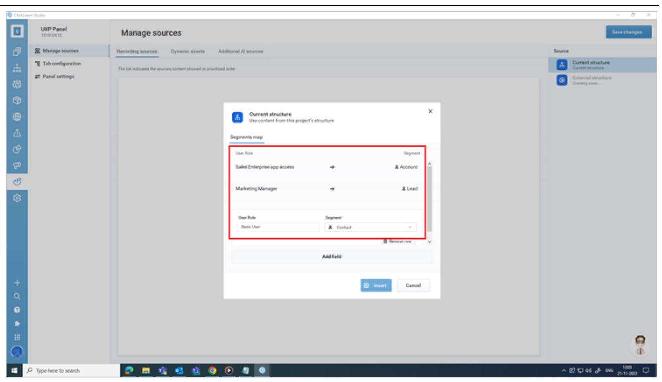


In our case, we have added the Account segment to the Sales Enterprise app access user role.

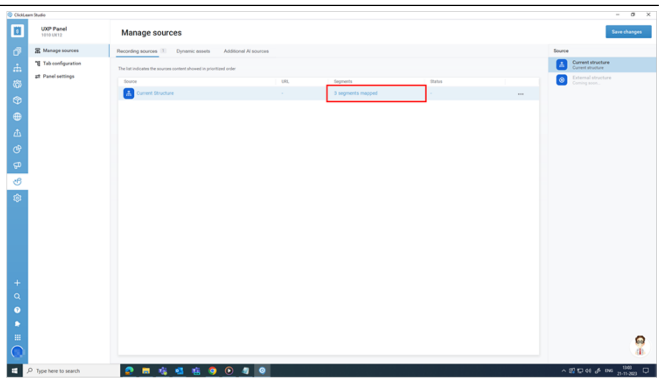


Similarly, we will create two more user roles. We will assign Lead and Contact to the Marketing Manager and Basic User, respectively. After segment mapping, click on Insert.

NOTE: Recordings without any assigned segments will be visible to everyone.

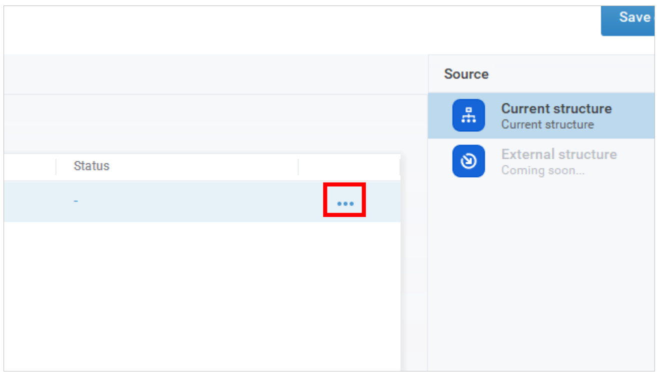


The **Segments** column displays the number of segments you have mapped in the current structure.



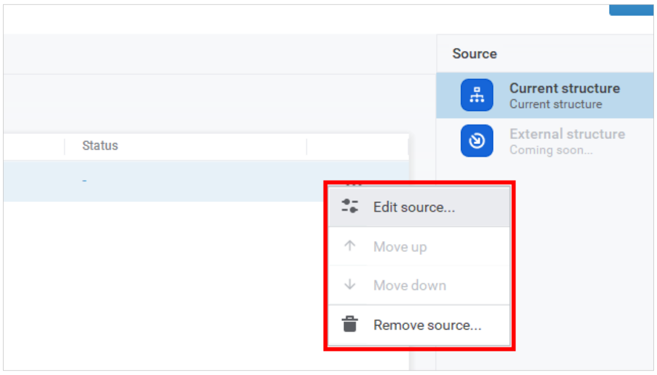
10.4.1.1.3. Other options associated with the current structure

Click on the button **More Source** of grid cell **Action**.

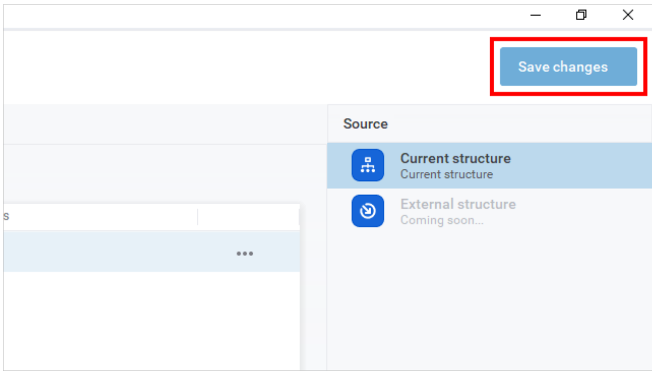


The other options associated with the current structure are:

- **Edit source:** This allows you to edit the user role and segments.
- **Move up:** The selected source will move up by one step.
- **Move down:** The selected source will move down by one step.
- **Remove source:** This will delete the source.



Click on the button **Save changes**.



10.4.1.2. External Structure Configuration

10.4.1.2.1. Prerequisites

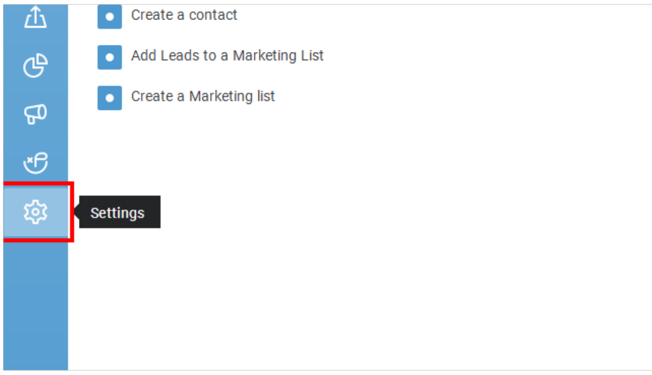
Listed below are the prerequisites for using the content from a different company.

- Published Content URL.
- Metadata names.
- Segment names.

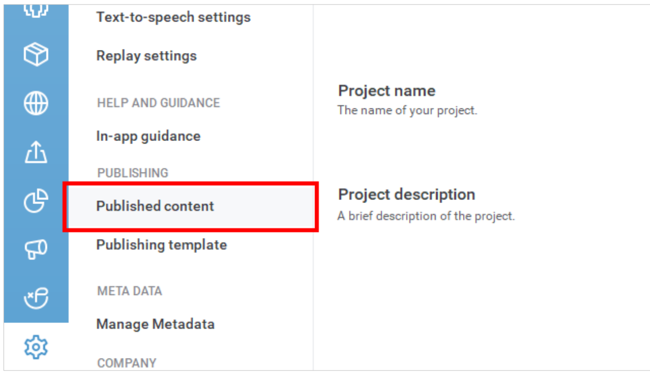
10.4.1.2.2. UXP Federation

You must do the UXP federation to allow the destination company to use your content. This formal handshake lets the source company share its content with the destination company.

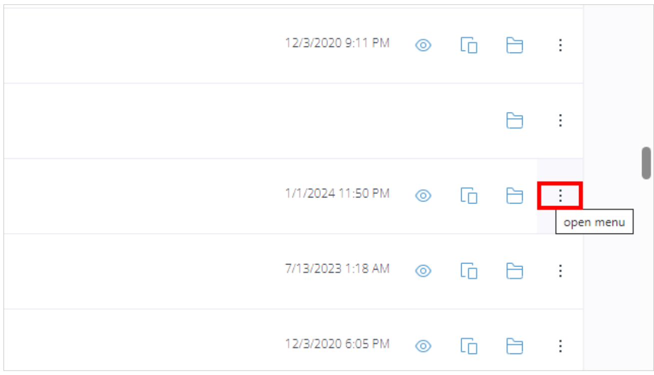
Below are the steps you can follow for the UXP federation.
Click on the **Settings** button.



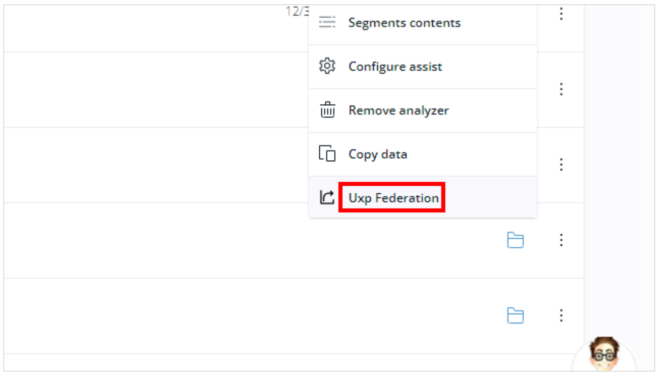
Click on the button **Published content.**



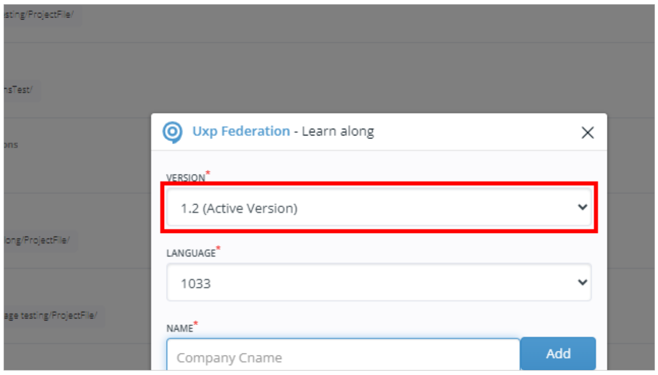
Select the project that has the content you want to share. Click on the button more.



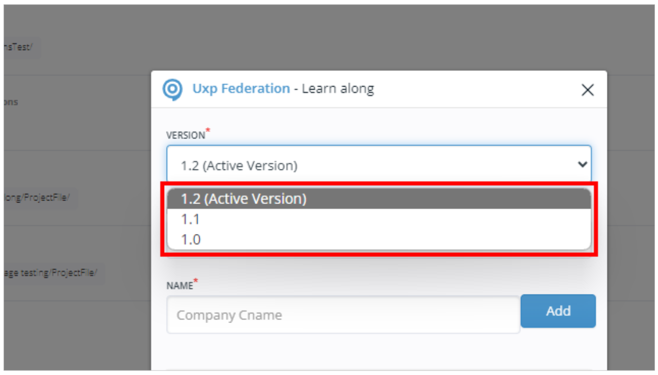
Click on **Uxp Federation**.



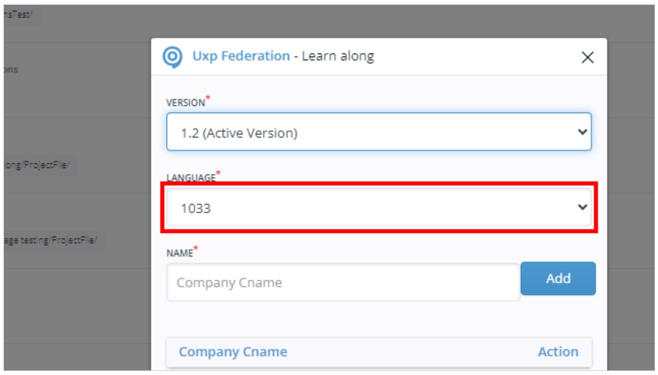
This displays the active version of the project.



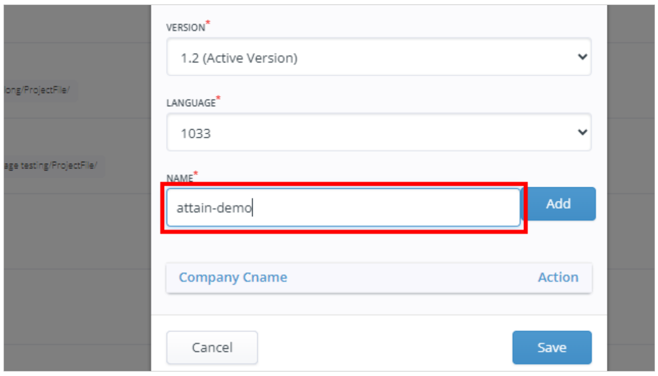
You can choose the version you want to use from the dropdown.



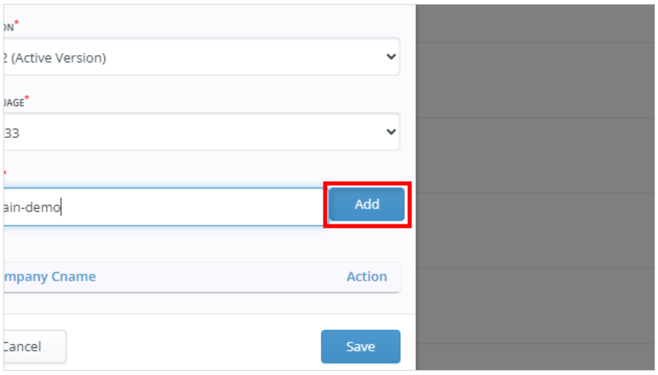
You can select the language of the project.



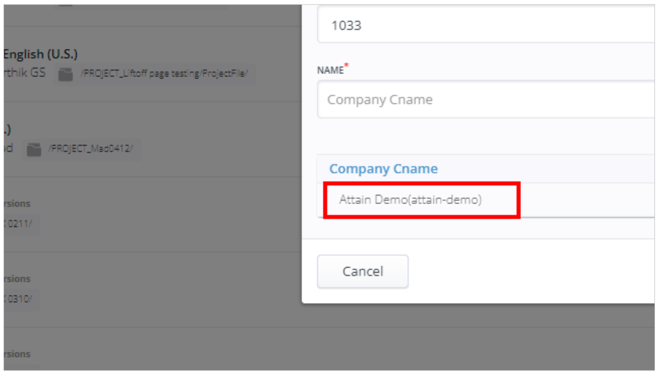
Click on **NAME** to enter the name.
This should be the organization name of the company to which you are sharing the content to be used in UXP.



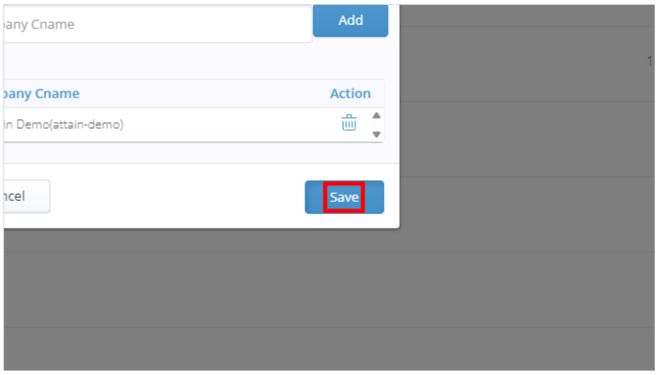
Click on the link **Create**.



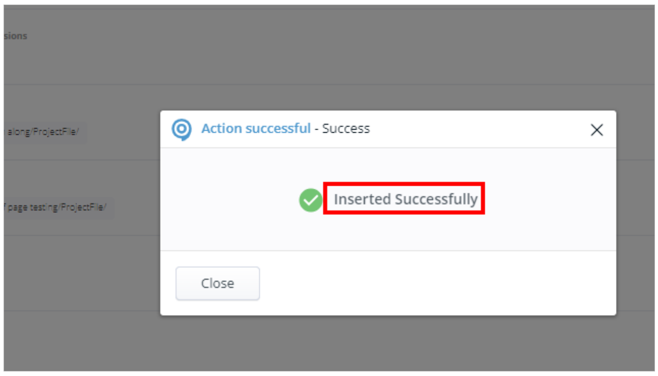
The company Cname **Attain Demo** is created.



Click on **Save**.

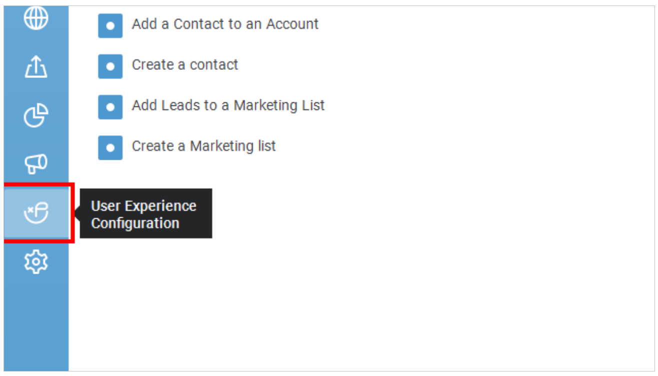


This displays the message: **Inserted Successfully**.

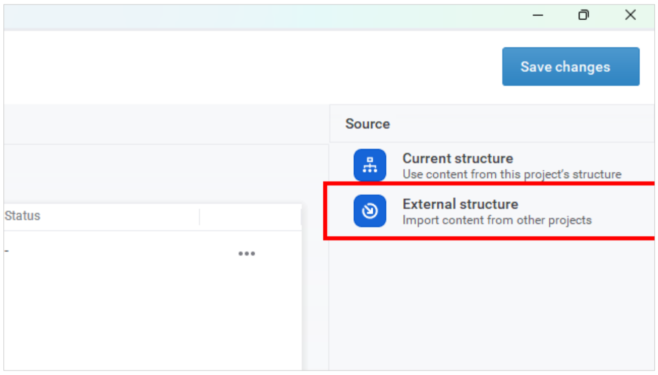


10.4.1.2.3. Configuring in the User Experience Configuration

Click on the button **User Experience Configuration.**

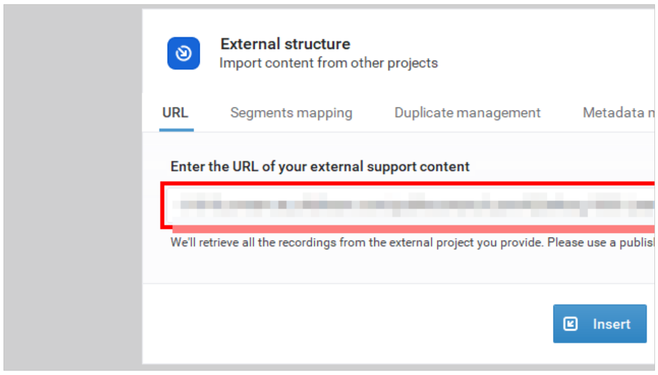


Click on the node **External structure** and drag and drop in the panel.



10.4.1.2.3.1. URL

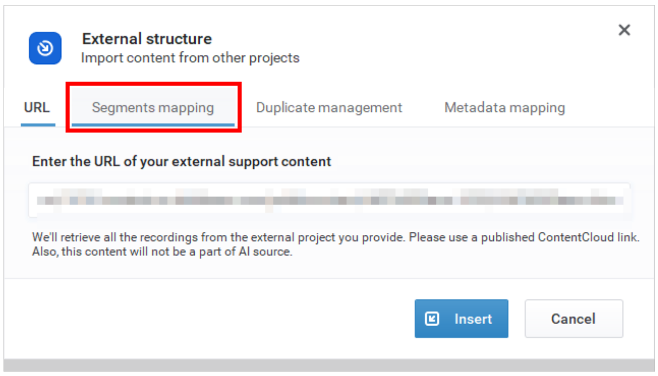
URL: This opens with a new dialog box where **you** (the destination company) must enter the content URL of the **source project** you received via mail. Click on the textbox and enter the **Url**.



10.4.1.2.3.2. Segment mapping

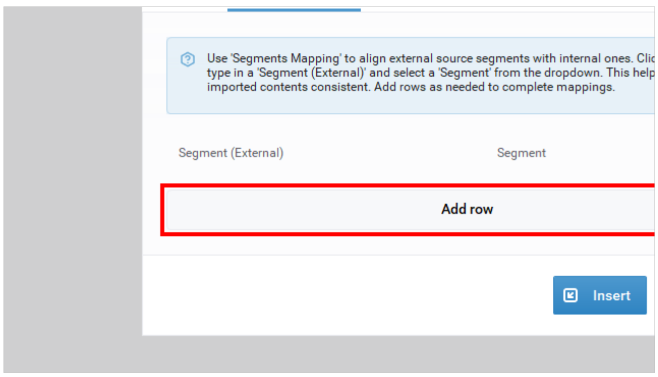
Segment mapping helps you to align external source segments with internal ones.

Click on the tab item **Segments mapping**.



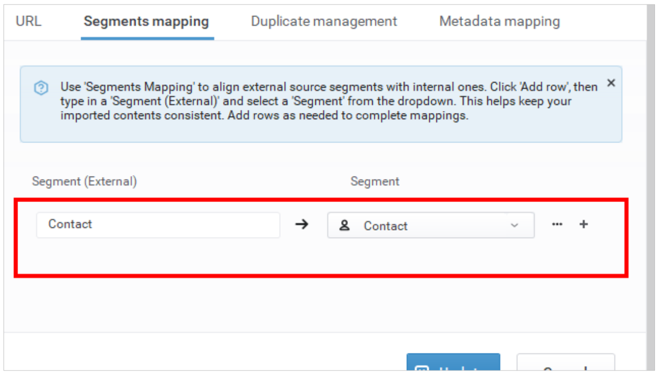
If you have not mapped these segments in the destination and the content is segmented in the source, then those recordings will not appear in UXP.

Click on the button **Add row**.



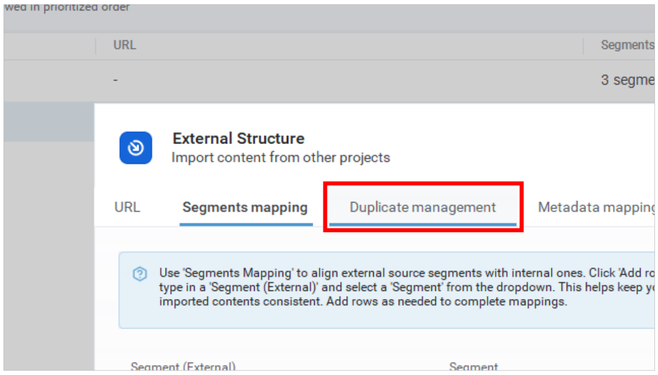
Here, the **Segment (External)** is the segment name used in the source project.

The **Segment** is the segment name used in the internal project.



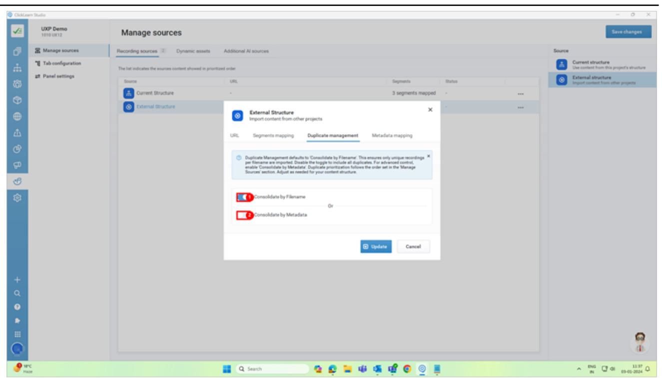
10.4.1.2.3.3. Duplicate management

Click on the tab item **Duplicate management.**



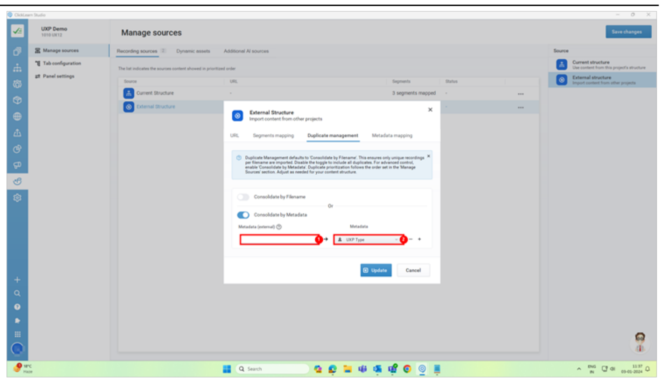
Duplicate management

1. Click on the toggle switch **Toggle Filename.** This ensures unique recordings per filename are imported. You can disable the toggle if you wish to include all the duplicates.
2. For advanced control, you can enable **Toggle Metadata.** This will check the value of **Metadata** and will restrict the duplicate content from the destination.



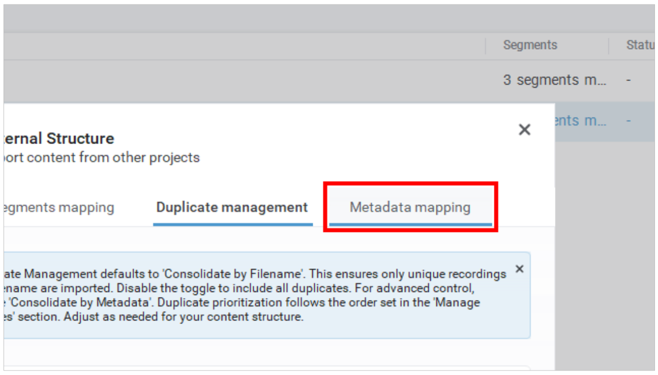
Metadata

1. Click on the textbox **Role** and enter the Metadata used in the external project.
2. Click on the dropdown **Segment** to select the Metadata from the internal project.



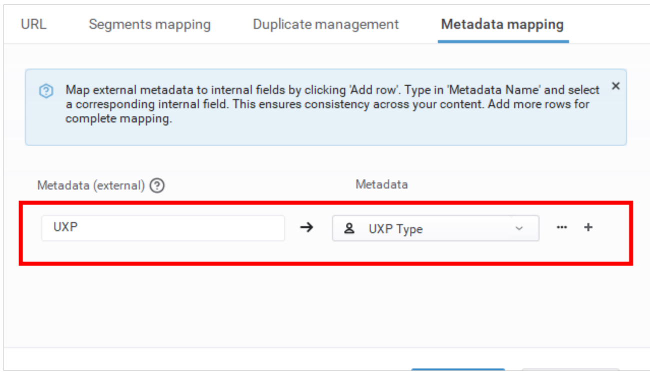
10.4.1.2.3.4. Metadata mapping

Click on the tab item **Metadata mapping.**

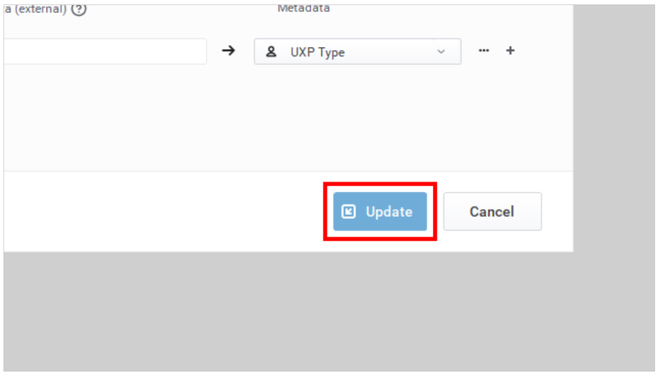


Here, the **Metadata (external)** is the metadata name used in the source project.

Metadata is the metadata name used in the internal project.

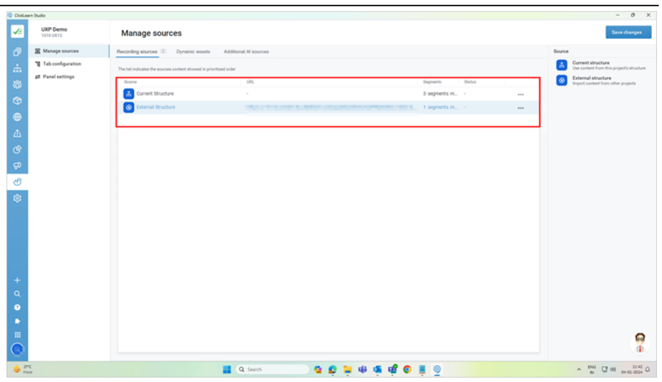


Click on the button **Update.**



The recording sources now include the external structure.

NOTE: Adding the recording sources in the contextual tab is necessary to see the changes in the application.



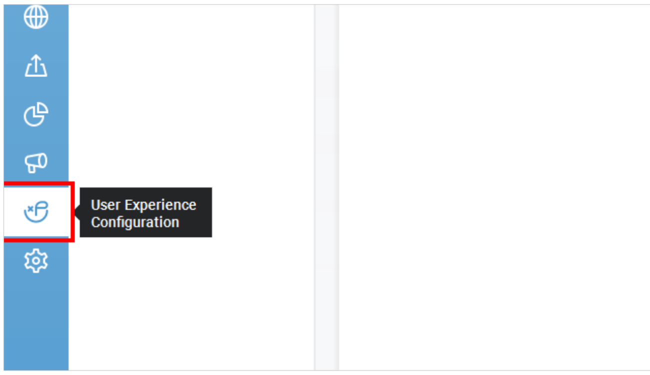
10.4.2. Dynamic Assets

10.4.2.1. Dynamic Assets

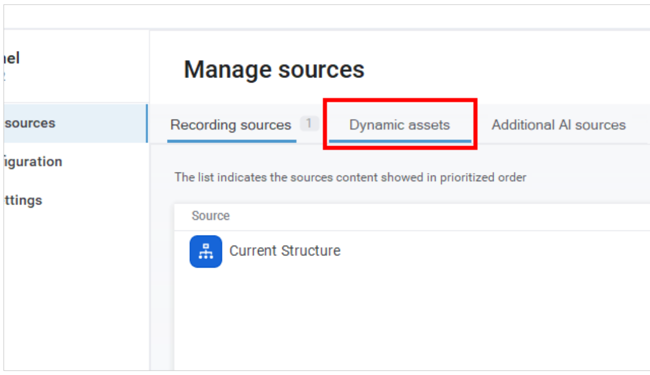
10.4.2.1.1. Dynamic Assets

Dynamic asset allows you to add content from sources generated outside ClickLearn Attain, and this is a source for Contextual Search and Contextual Area.

Click on the button **User Experience Configuration**.

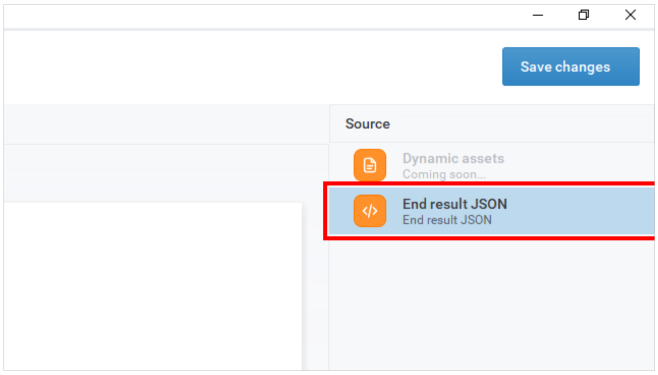


Click on the tab item **Dynamic Assets**.

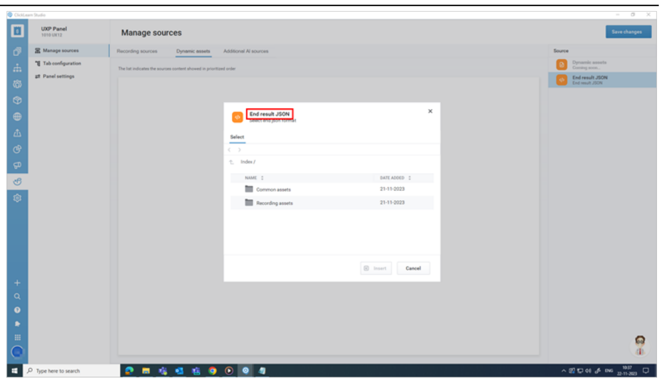


10.4.2.1.2. End Result JSON

Select, drag, and drop the **End result JSON** in the empty panel.

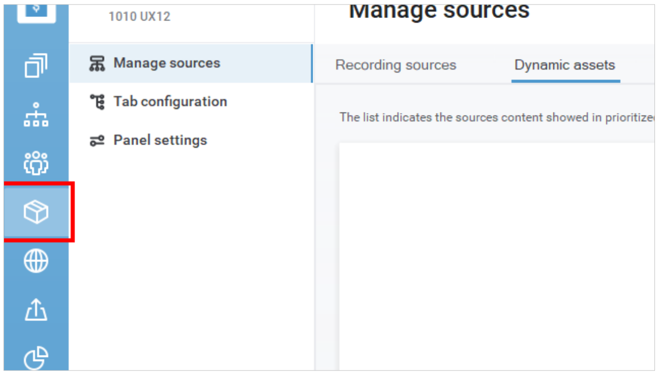


It pops up with a new window, **End result JSON,** that allows you to add the JSON files to dynamic assets. In our case, there are no JSON files present. To have the JSON files here, you can configure them from assets. Click on Cancel.



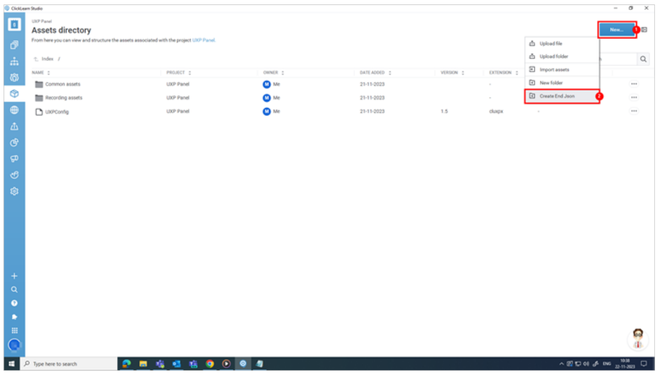
10.4.2.1.2.1. Create End JSON

Click on the **Assets** button.



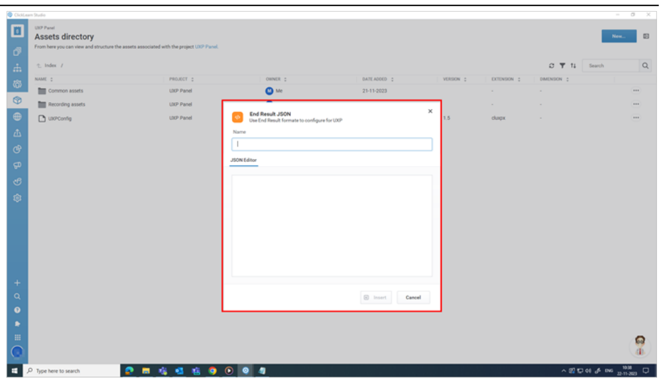
Create End JSON

1. Click on the button **New**.
2. Click on the menu item **Create End Json**.

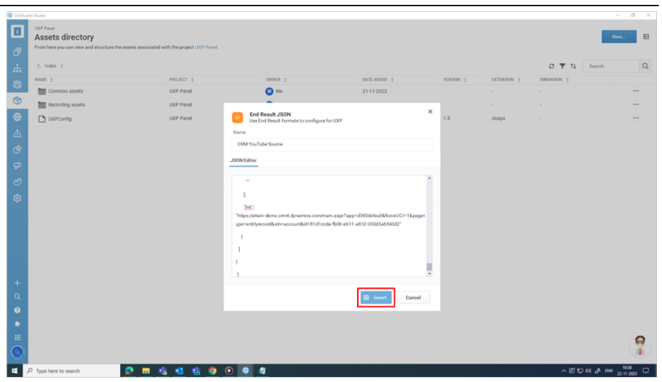


Name: The Name you would like to provide to the JSON file.

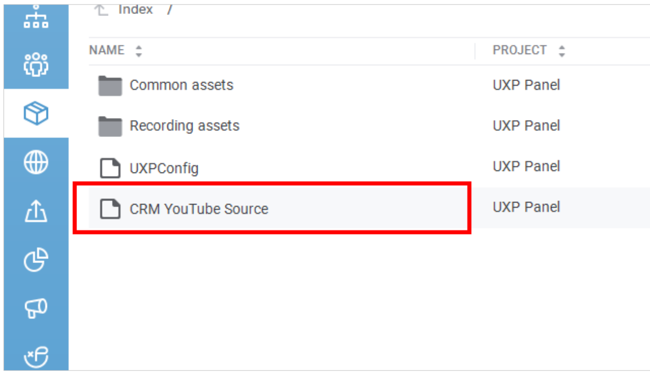
JSON Editor: You can insert the code here.



We have added the Name and the code to create a JSON file. Click on the button **Insert**.

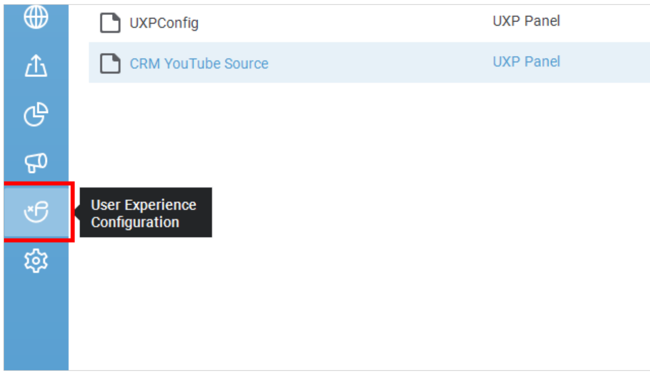


The JSON file we created is in the assets.

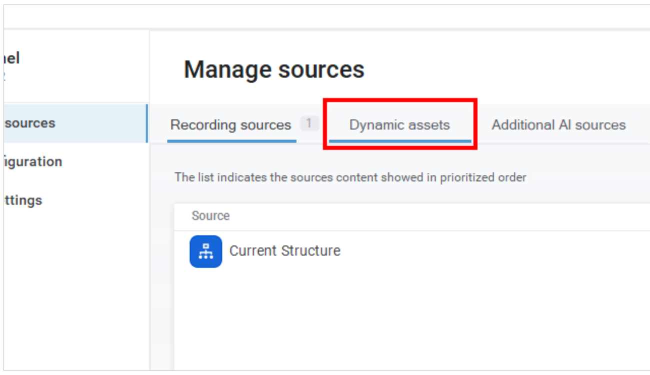


10.4.2.1.3. Add End Result JSON to Dynamic Assets

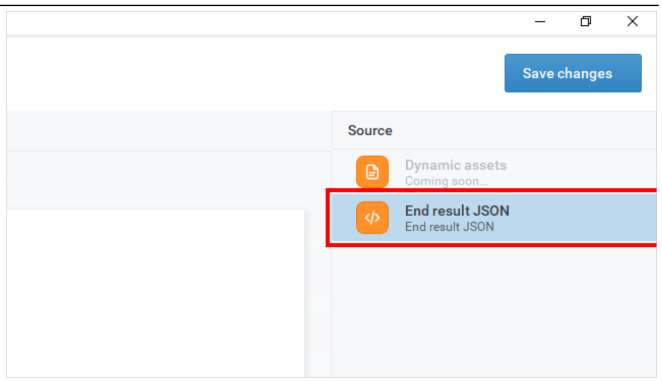
Click on the button **User Experience Configuration**.



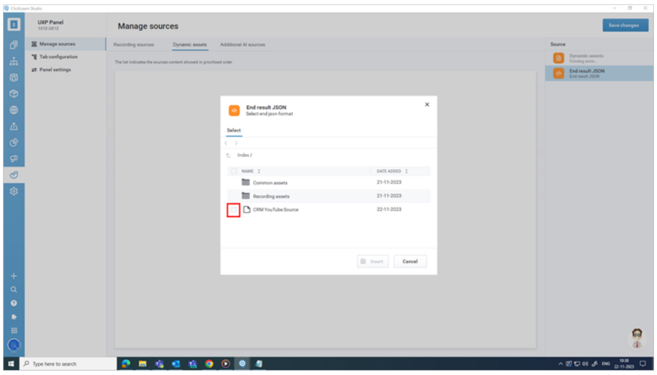
Click on the tab item **Dynamic Assets**.



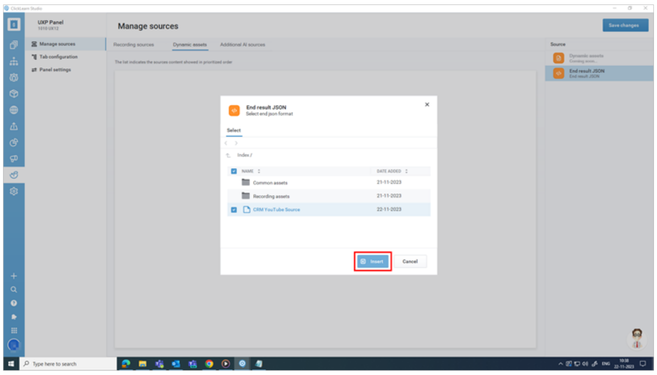
Select, drag, and drop the **End result JSON** in the empty panel.



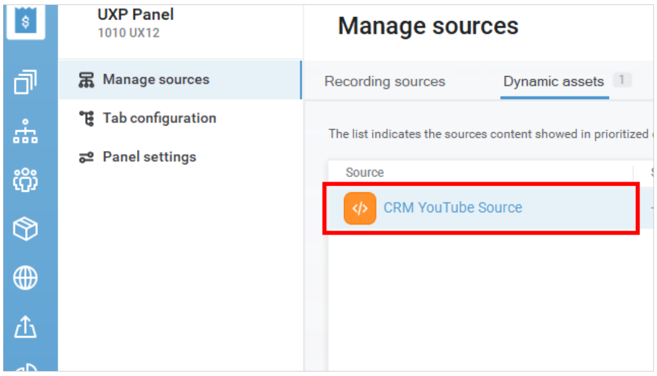
The JSON file you created in Assets is visible here. Click on the **CHECKBOX**. Choose the file you want to add to Dynamic Assets.



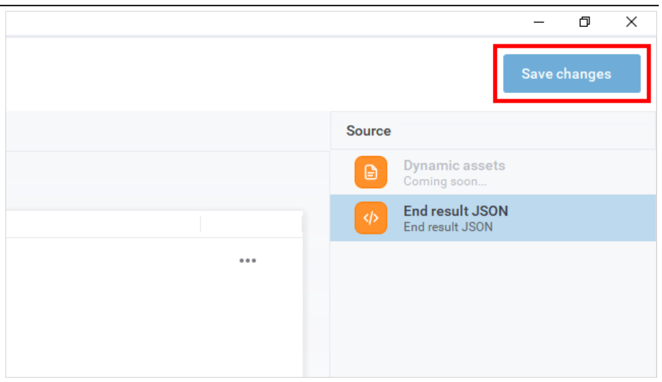
Click on the button **Insert**.



The dynamic asset uses the JSON file as a source.



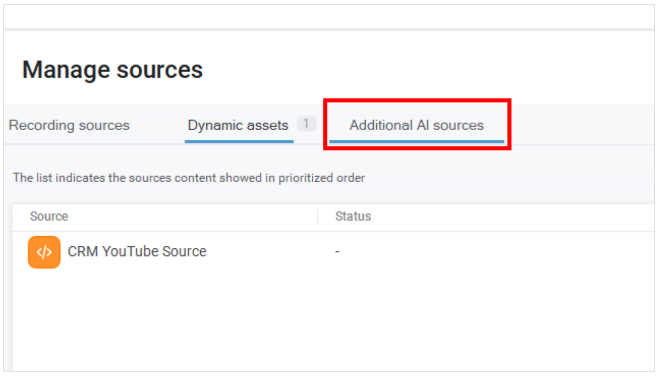
Click on the button **Save changes**.



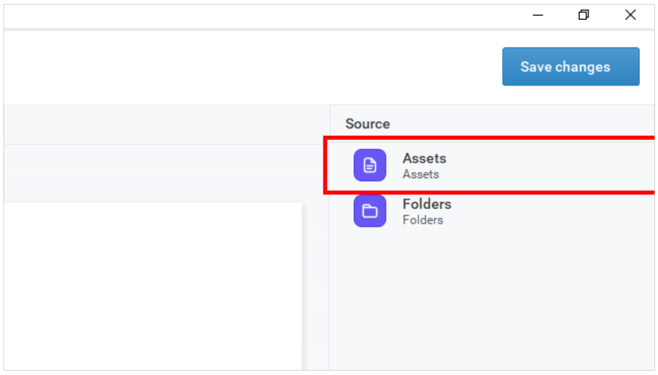
10.4.2.2. Adding Dynamic Asset: YouTube Crawler

10.4.3. Additional AI Sources

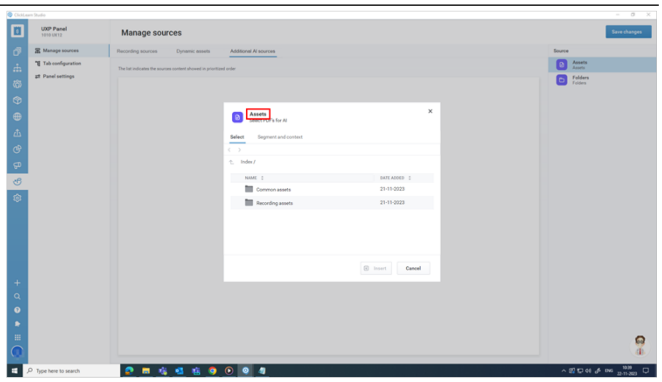
Click on the tab item **Additional AI sources**.



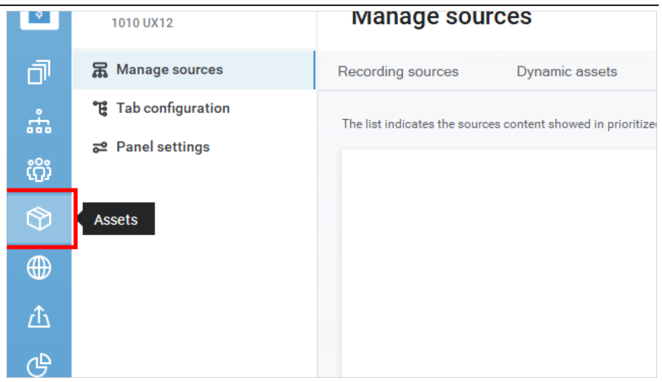
Assets allow you to add PDF files, which will be a source for AI. Select, drag, and drop Assets in the empty pane.



It opens with a new window, **Assets,** allowing you to add PDF files. In our case, no PDF files are present here; you can configure it from assets. Click on Cancel.

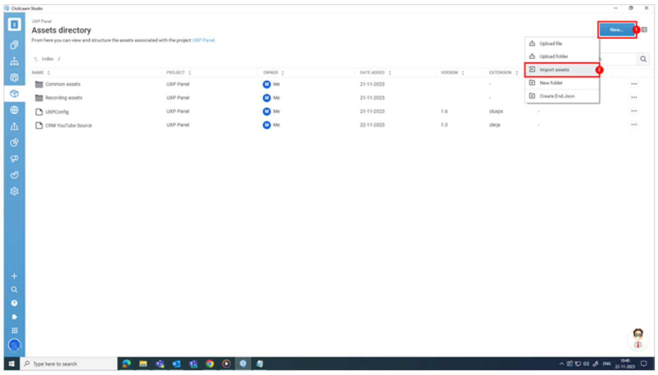


Click on the **Assets** button.

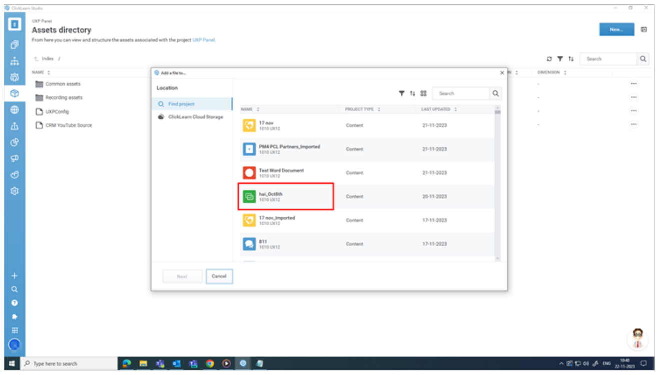


Import Assets

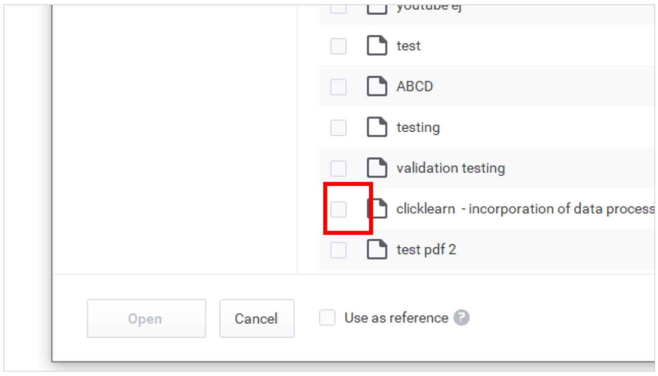
1. Click on the button **New**.
2. Click on the menu item **Import assets**.



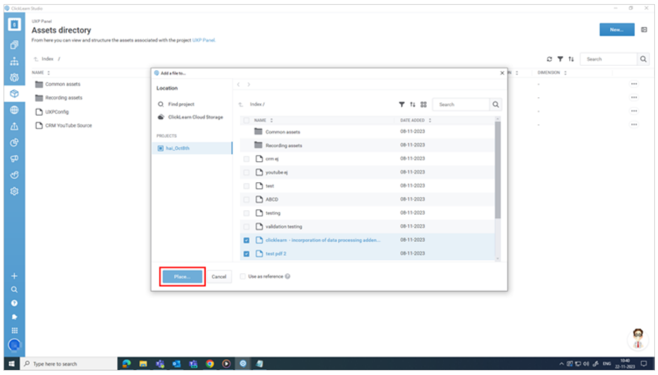
This opens a new dialog box that allows you to select the PDF files from the existing projects. Double-click on the project name you wish to import from.



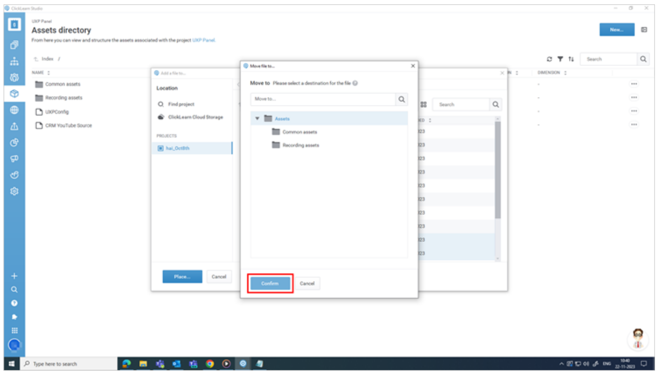
Click on the **CHECKBOX** and select the file you wish to add.



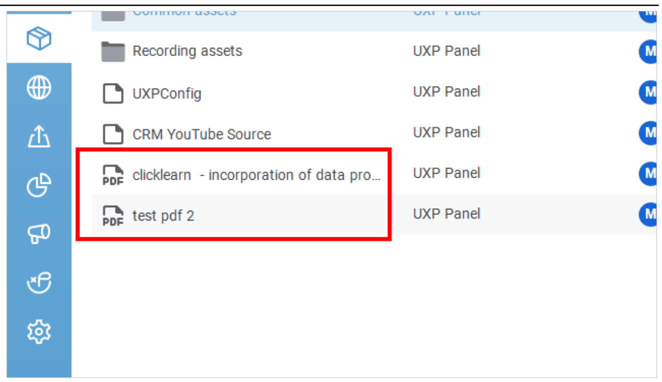
Once the files are selected, click on **Place**.



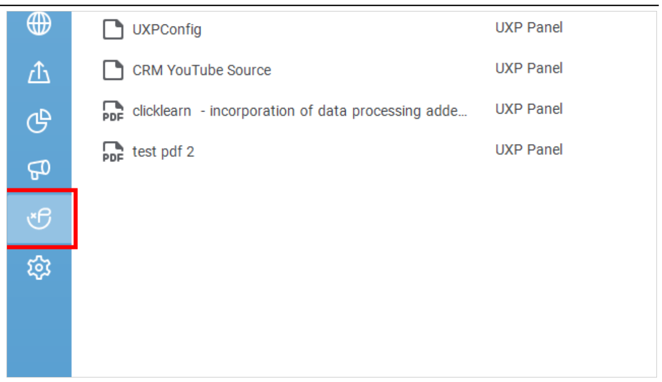
Click on the button **Confirm**.



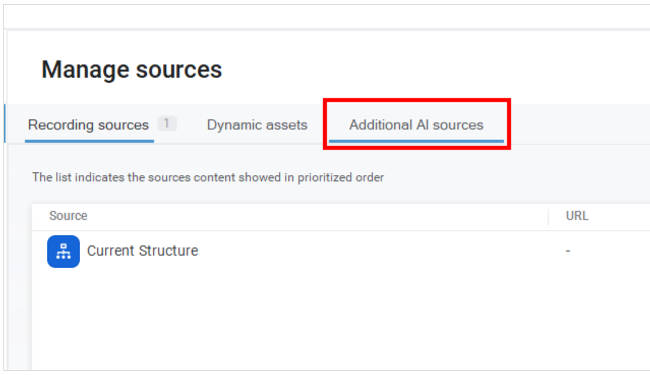
The PDF files are added to the assets.



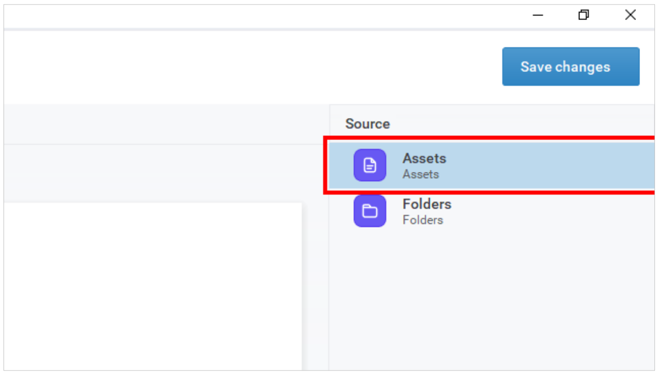
Click on the button **User Experience Configuration**.



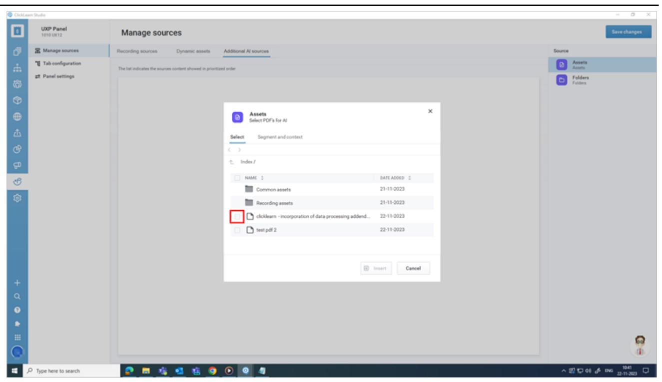
Click on the tab item **Additional AI sources**.



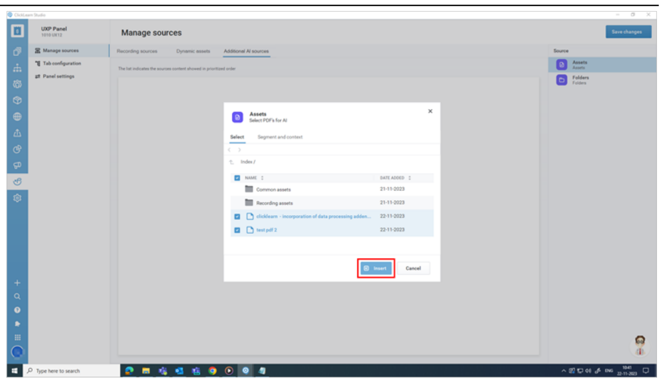
Select, drag, and drop the **Assets** in the empty panel.



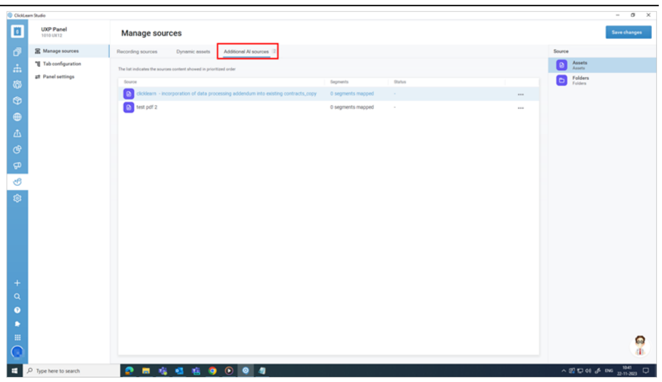
The PDF files you added to the assets are visible here. Click on the **CHECKBOX** and select the files to include them as an Additional AI source.



Click on the button **Insert**.

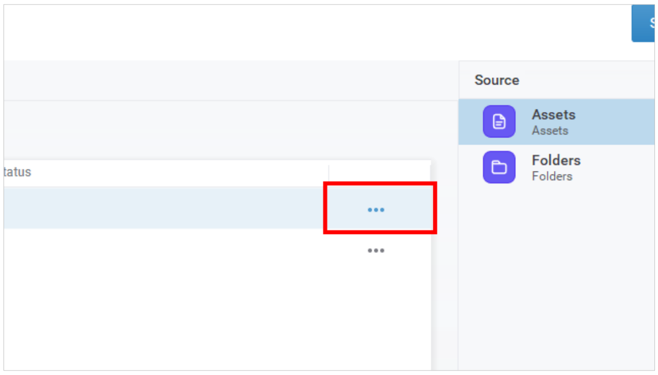


The PDF files are added in **Additional AI Sources**.



10.4.3.1.1. Other options associated with Assets

Click on the grid cell **Action**.



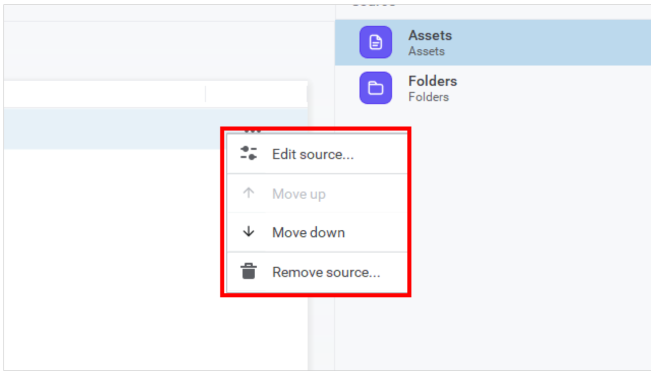
The other options associated with the Assets are:

Edit source: This allows you to edit the selected file.

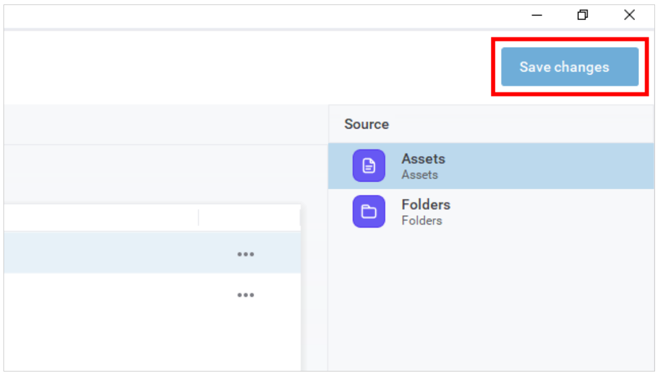
Move up: The selected file will move up by one step.

Move down: The selected file will move down by one step.

Remove source: This will delete the file.



Click on the button **Save changes**.



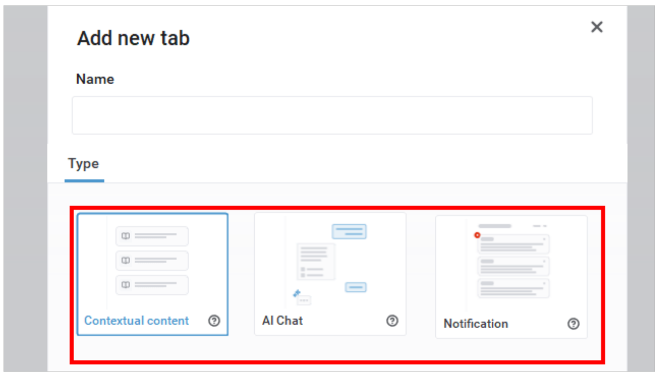
10.5. Tab Configuration

10.5.1. Contextual Content

10.5.1.1.1. Introduction

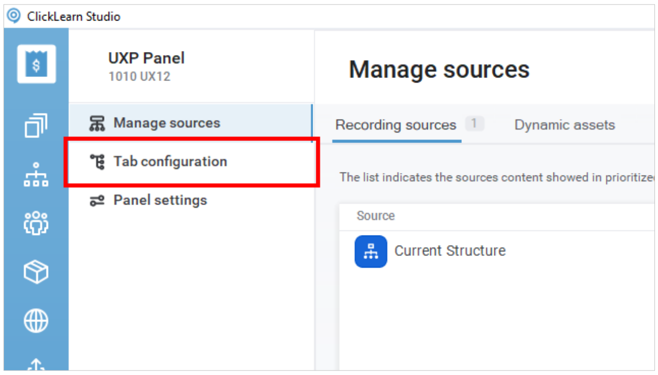
You can create three types of tabs for the UXP panel.

- **Contextual content:** This is the contextual area that displays the recordings and sources according to your configuration.
- **AI Chat:** This allows you to create a tab for AI Chat.
- **Notification:** This is the notifications tab that displays all types of notifications.

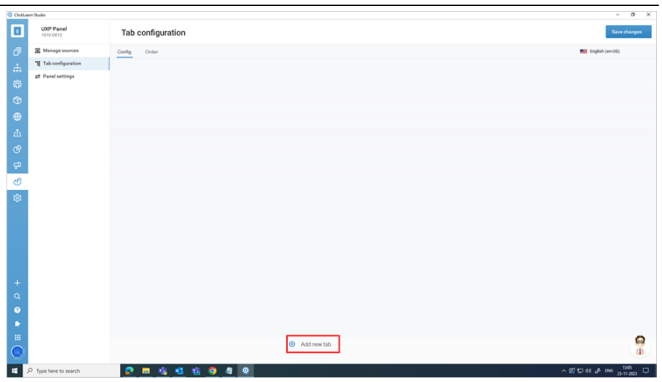


10.5.1.1.2. Steps to create a contextual content tab

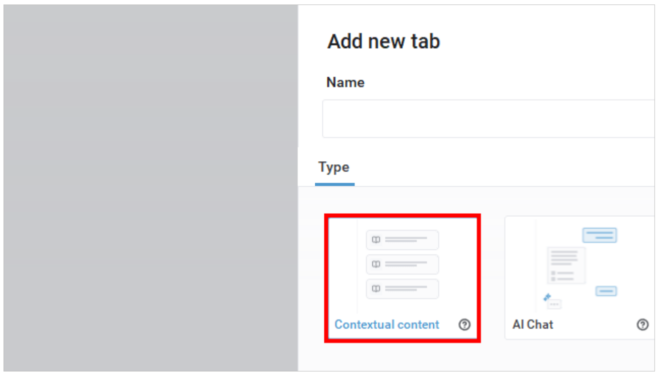
Click on the button **Tab configuration**.



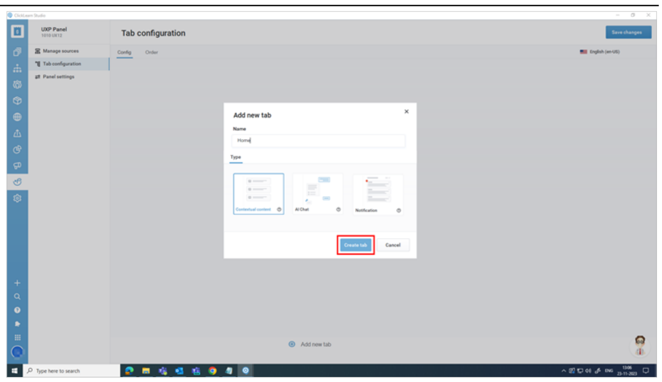
Click on the icon **Add new tab**.



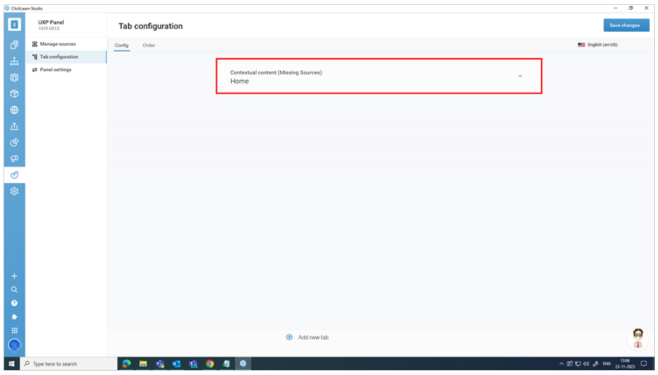
Click on the **Contextual content type.**



You can name the tab based on your project requirements. In our case, we are creating a contextual tab called Home. Type the name of the tab and click on the button **Create tab**.



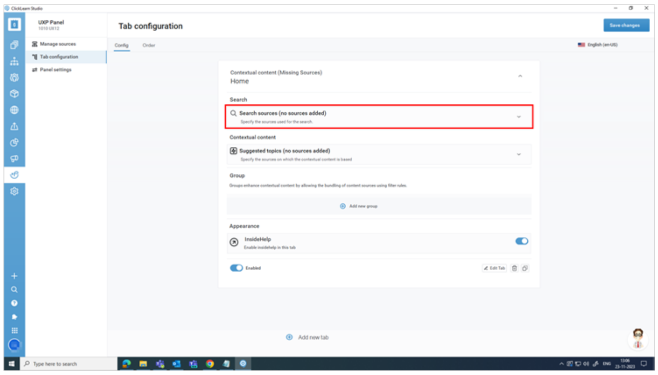
We have created the Home tab. It says missing sources; we still need to add sources for this tab. Click on the collapsible panel **Contextual content (Missing Sources)**.



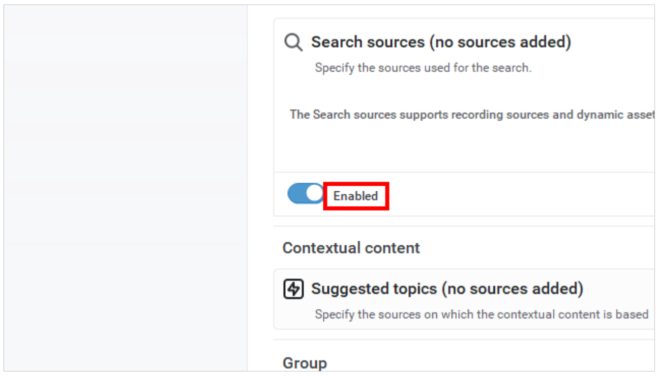
10.5.1.1.2.1. Contextual Search

10.5.1.1.2.2. Search sources: Adding recording source

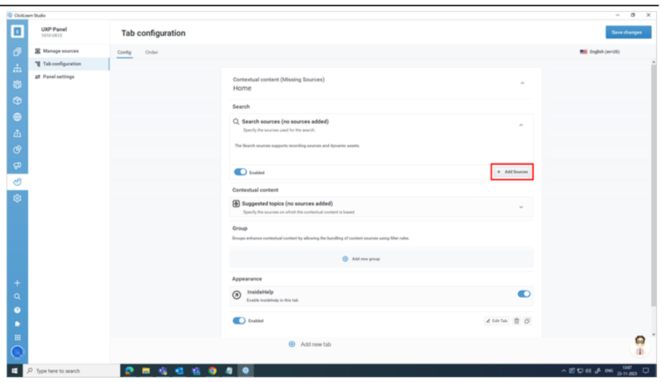
Click on the collapsible panel: **Search sources (no sources added)**.



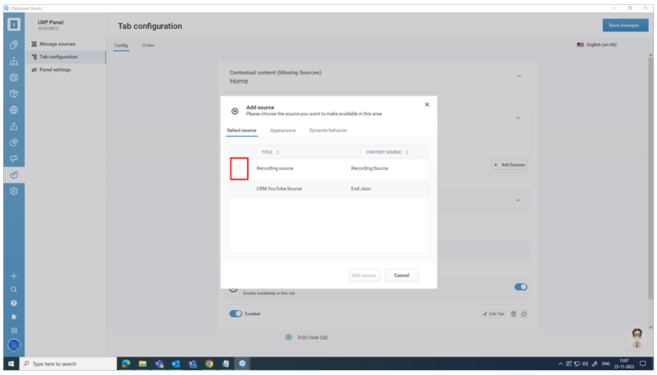
Click on the label **Enabled.** You can enable/disable this based on your project needs.



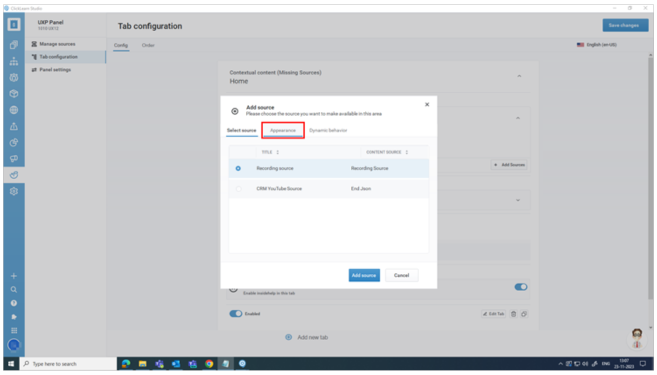
Click on the button **Add Sources**.



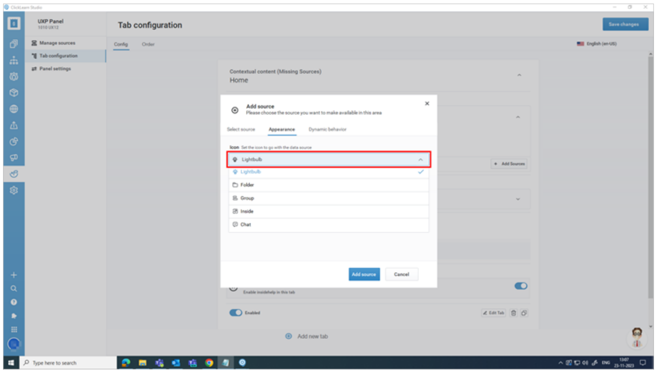
Click on the option **Recording source**.



Click on the tab item **Appearance**.



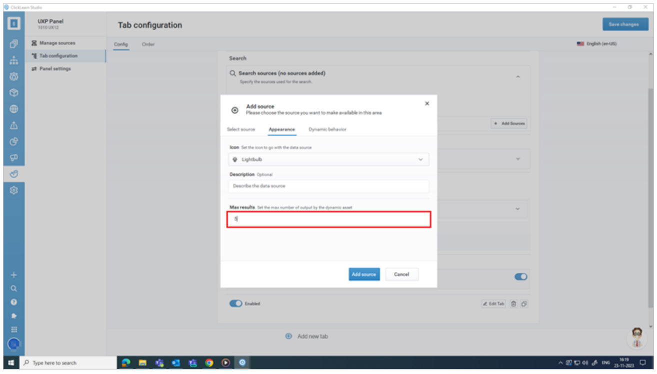
Click on the dropdown **Icon** and select **Lightbulb.** You can choose the icon that matches your data source.



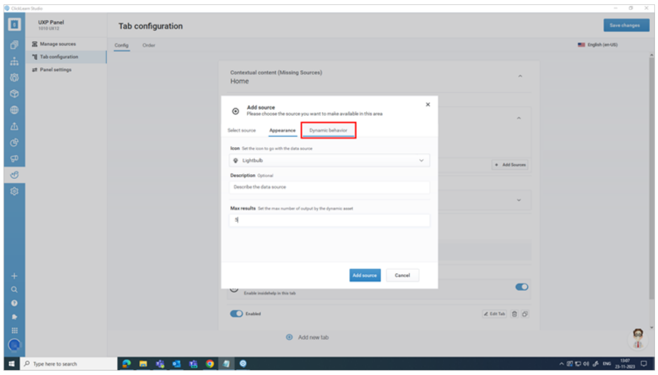
Description: With this option, you can describe the data source.

Max results: You can set the maximum number of results.

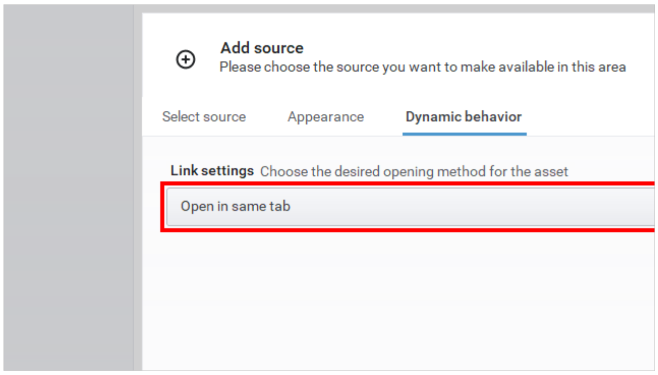
Click on the textbox **Max Results** and enter the maximum count of items to be displayed.



Click on the tab item **Dynamic behavior**.



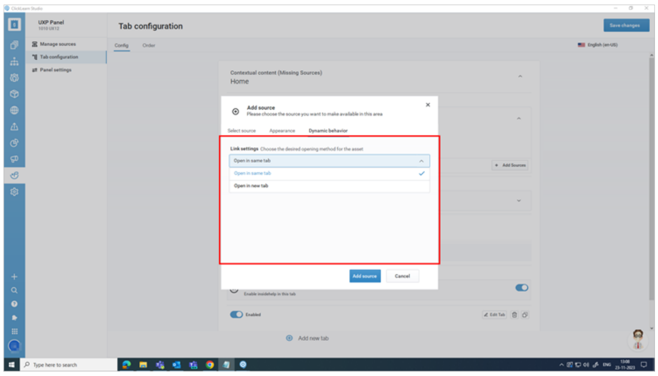
Click on the dropdown **Behaviour**.



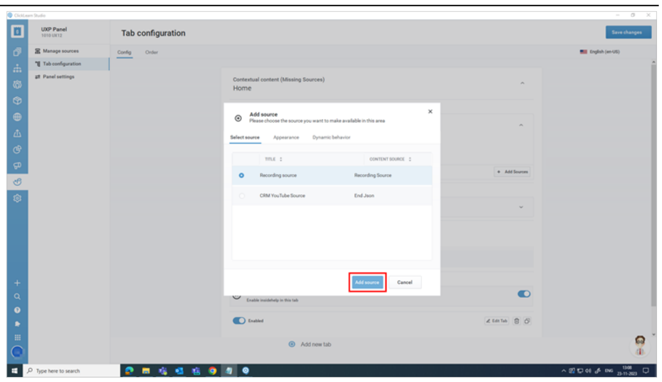
Dynamic behavior is how you want your recordings to open. Click on the dropdown item **Open in same tab**. There are two options.

- Open in same tab.
- Open in new tab.

NOTE: Ideally, choosing to open in a new tab is more meaningful when you add the JSON files, as they are videos, and you can open them in a new tab.

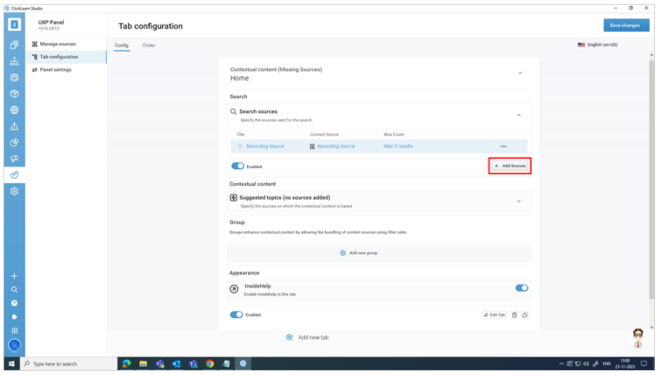


Click on the button **Add source**.

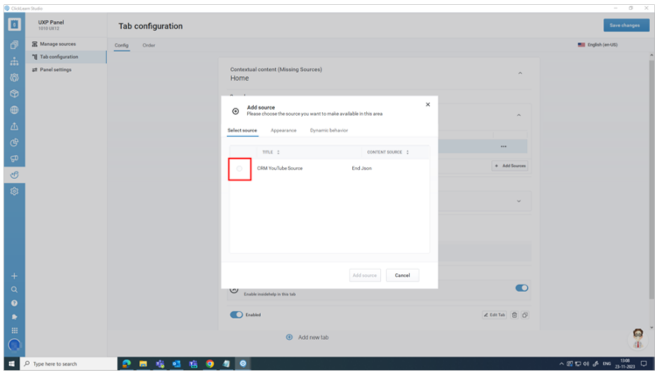


10.5.1.1.2.3. Search sources: Adding JSON files

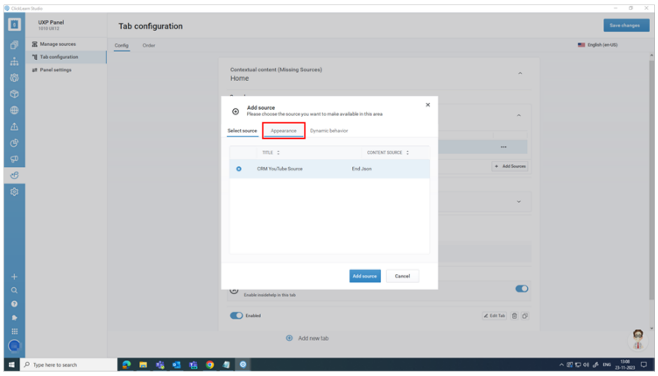
Now, we will add the JSON files as a source. Click on the button **Add Sources**.



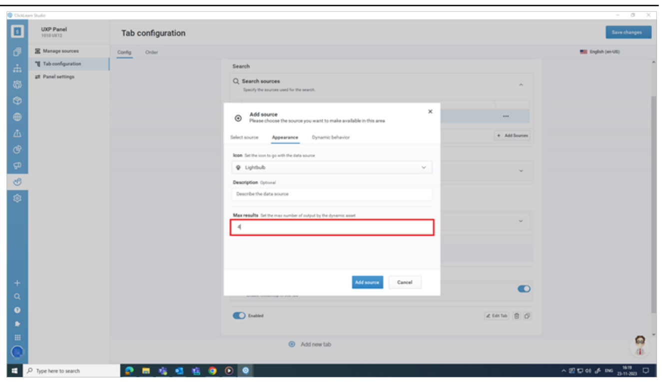
To select the **CRM YouTube Source** option, click on the radio button.



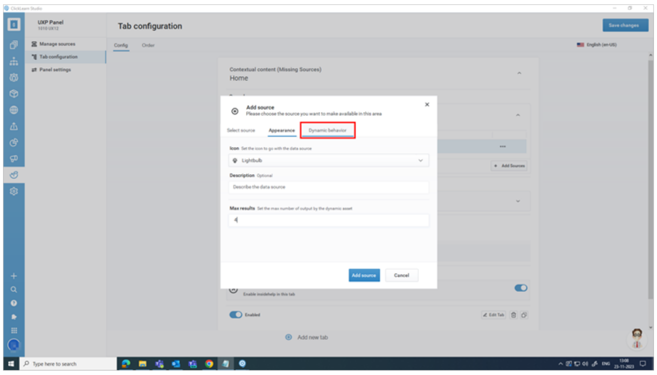
Click on the tab item **Appearance**.



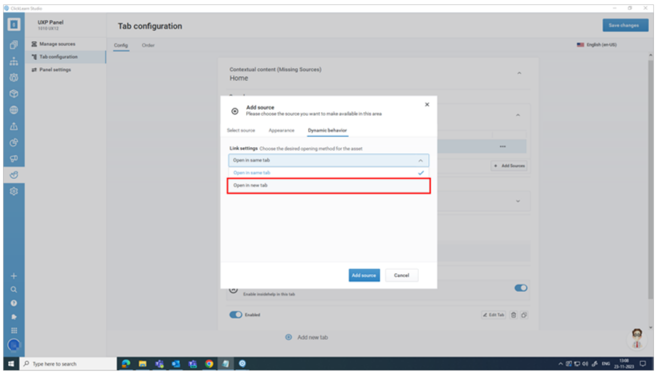
Click on the textbox **Max Results and enter 4**.



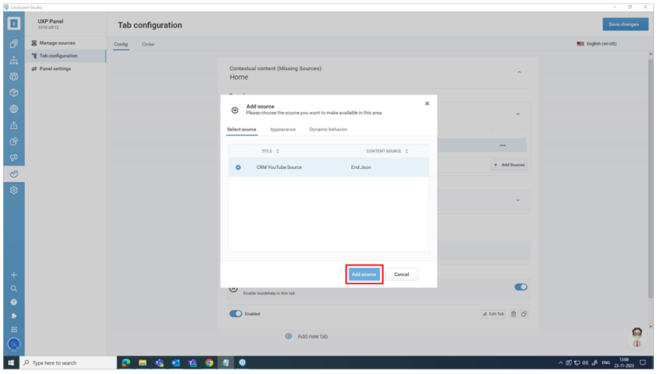
Click on the tab item **Dynamic behavior**.



Click on the dropdown item **Open in new tab**.



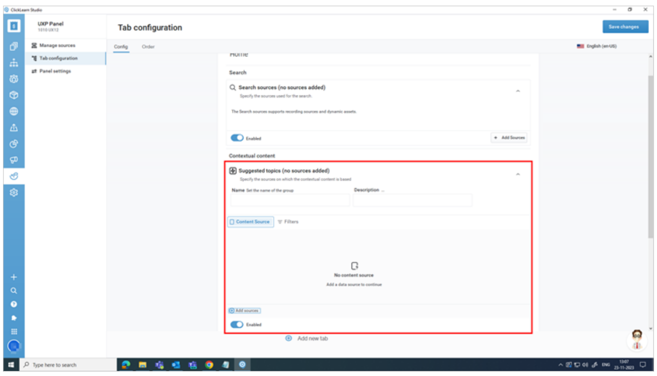
Click on the button **Add source**.



10.5.1.1.2.4. Contextual Content

10.5.1.1.2.5. Suggested topics: Adding recording source

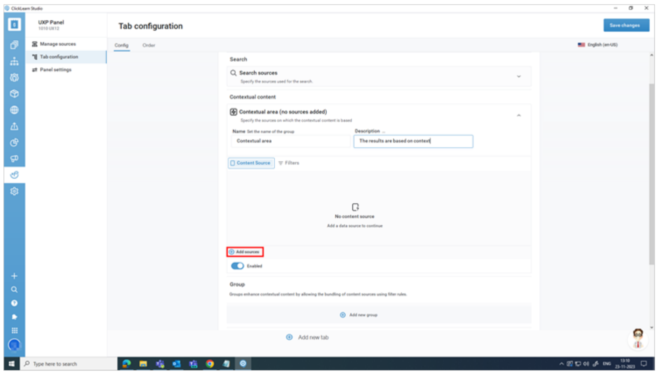
Click on the collapsible panel Suggested topics (no sources added). Here, you need to provide the name and description.



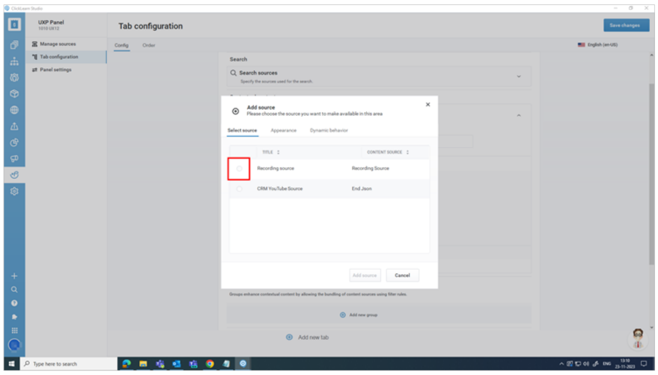
In our case here, we have added:

- **Name:** Contextual area
- **Description:** The results are based on context

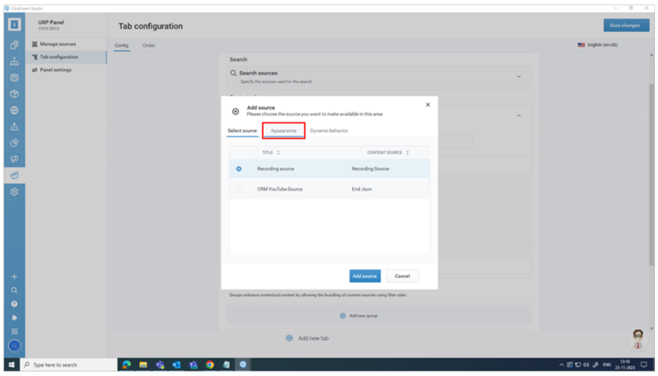
Click on the icon **Add sources**.



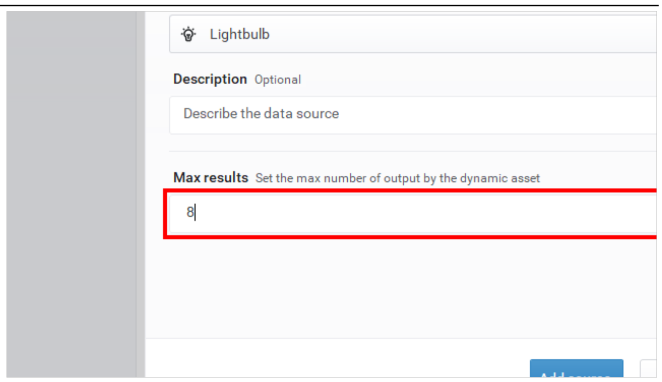
Click on the option **Recording source**.



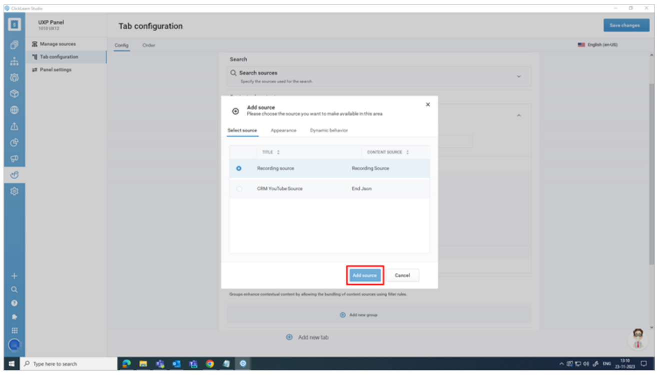
Click on the tab item **Appearance**.



Click on the textbox **Max Results** and enter **8**.

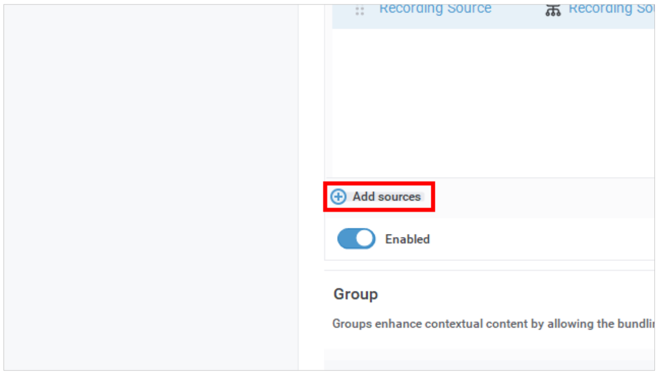


Click on the button **Add source**.

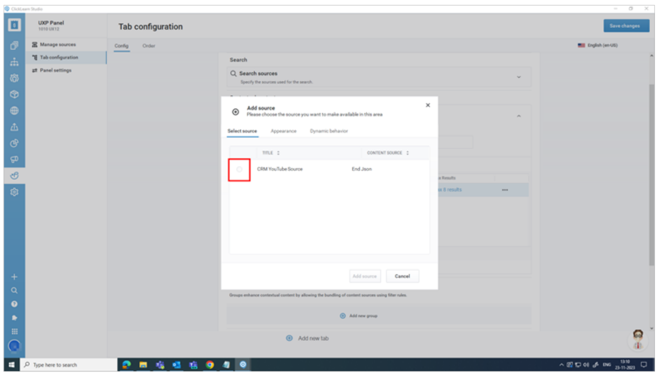


10.5.1.1.2.6. Suggested topics: Adding JSON files

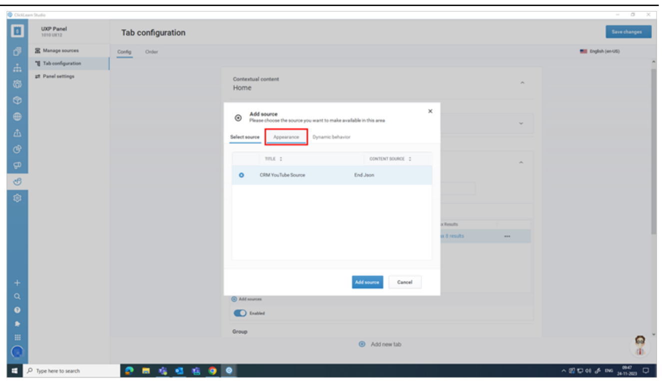
Click on the icon **Add sources**.



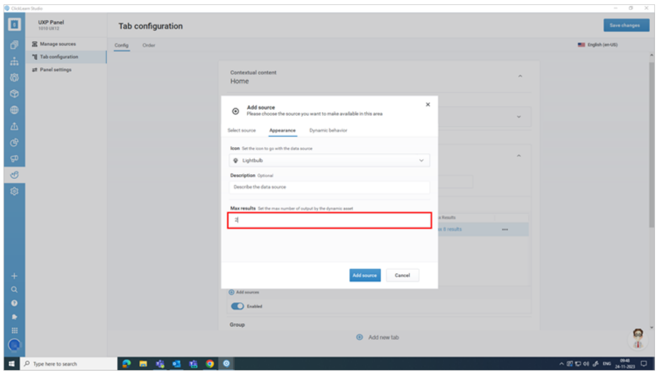
Click on the option **CRM YouTube Source**.



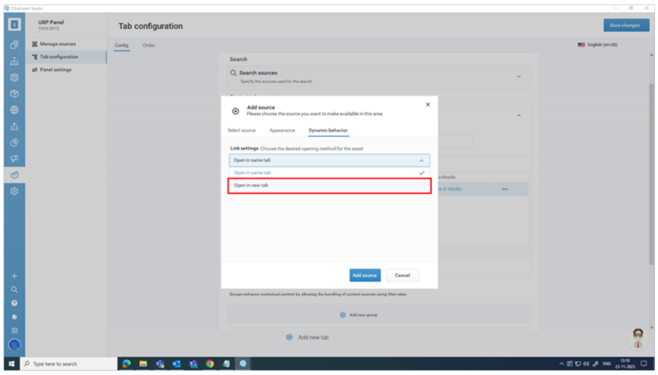
Click on the tab item **Appearance**.



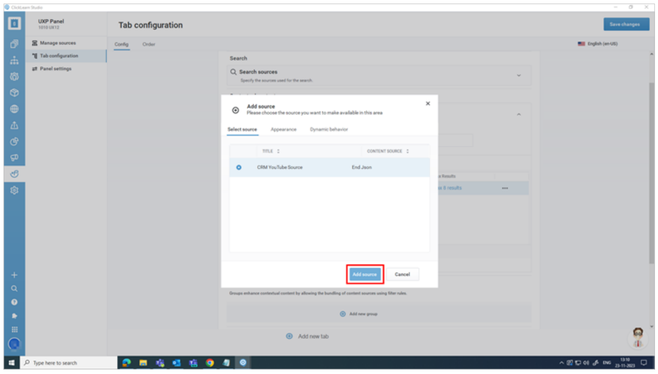
Click on the textbox **Max Results** and enter **2**.



Click on the dropdown item **Open in new tab**.

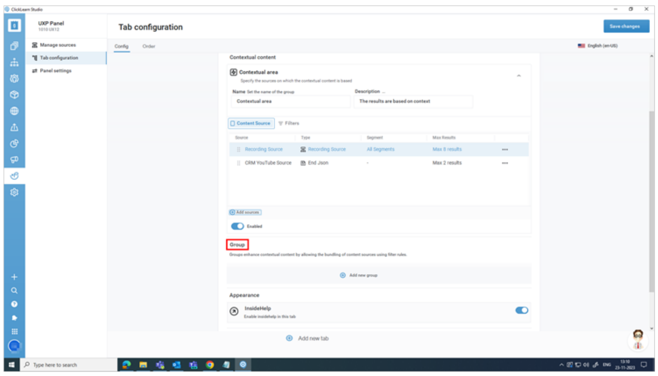


Click on the button **Add source**.

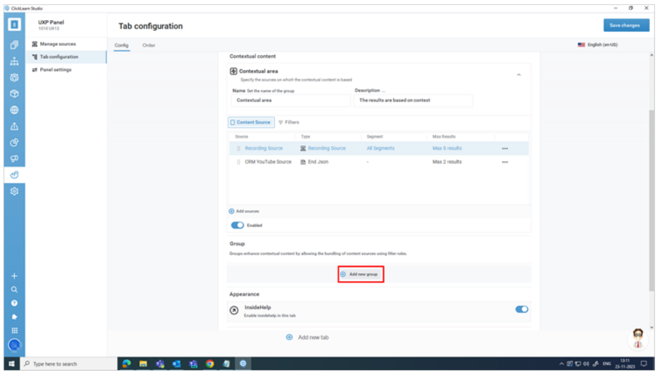


10.5.1.1.2.7. Add new group

Group: Groups enhance contextual content by allowing the bundling of content sources using filter rules.



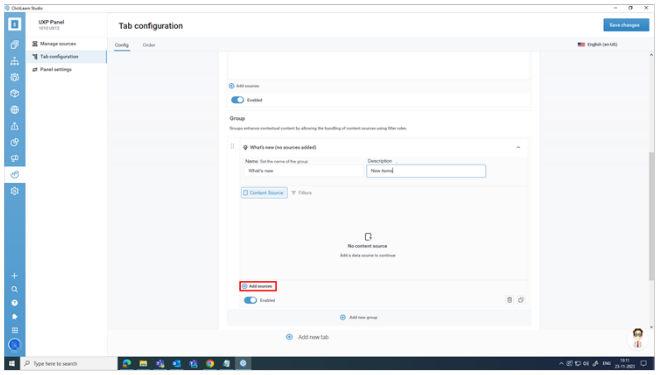
Click on the icon **Add new group**.



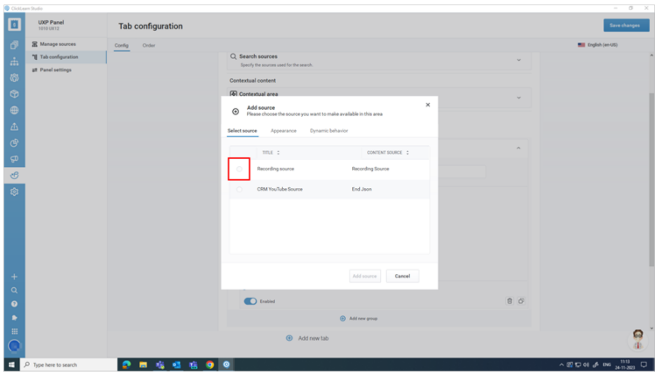
Here, you can set the name and description of the group. In our case, we have set:

- **Name:** What's new
- **Description:** New items

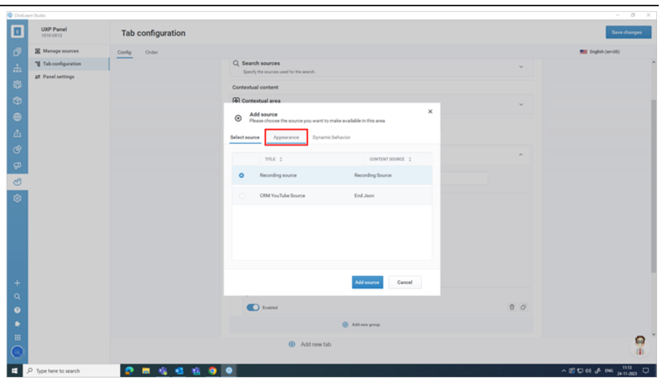
Click on the icon **Add sources**.

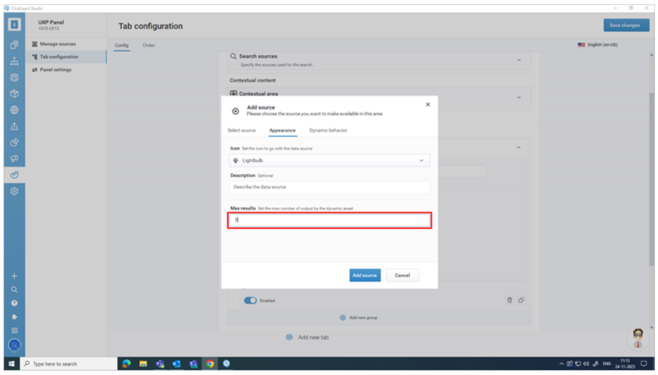
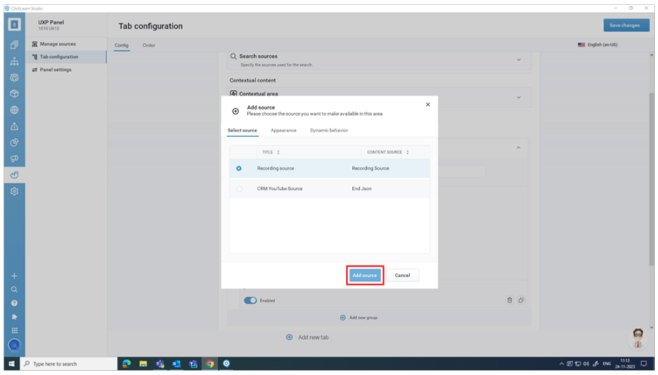
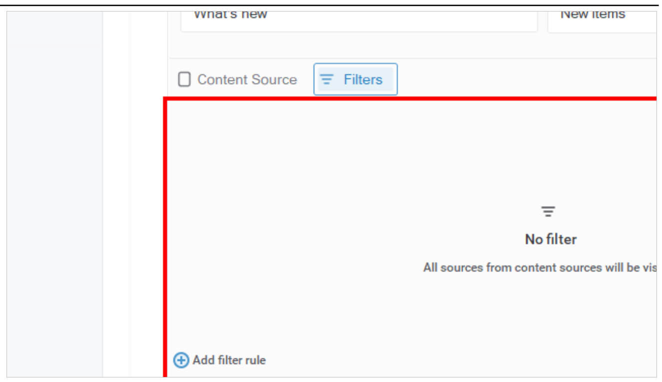
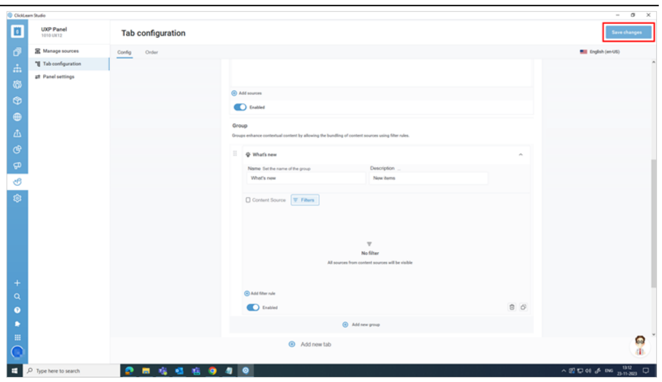


Click on the option Recording source.



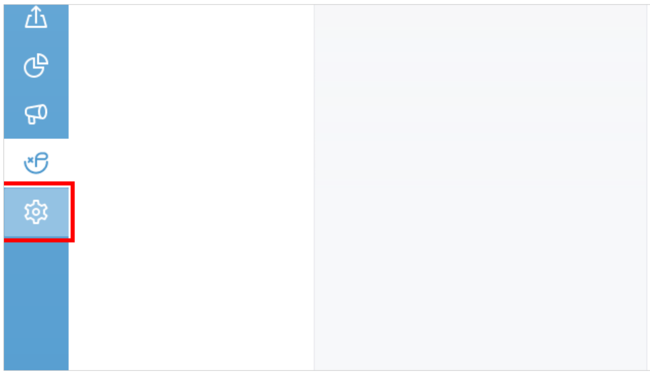
Click on the tab item **Appearance**.



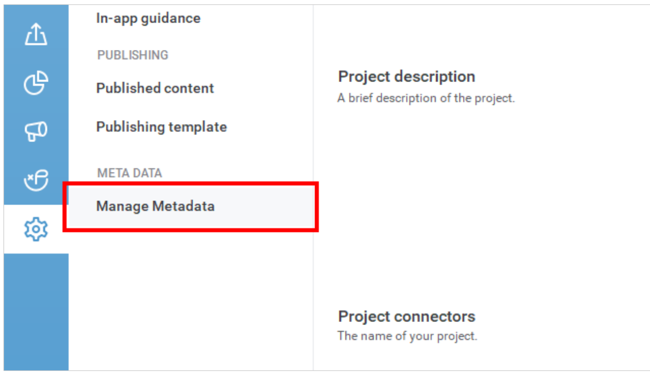
Click on the textbox **Max Results** and enter **5**.	
Click on the button **Add source**.	
Filters: This option allows you to filter items in groups. **NOTE:** Adding the User Experience Panel type (Metadata) to your project is necessary for using filters. You can also use custom metadata as filters based on your requirements.	
Click on the button **Save changes**.	

10.5.1.1.2.8. Adding UXP Type Metadata

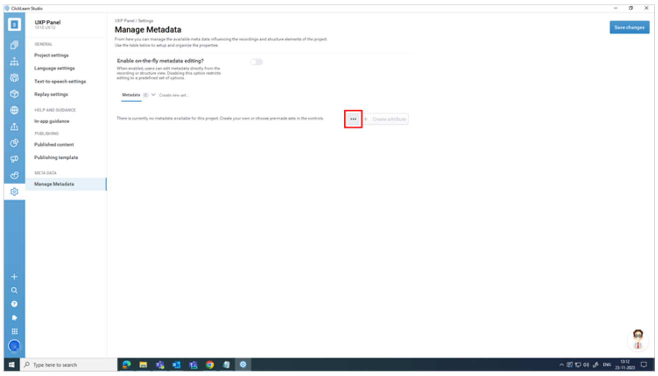
To add Metadata, click on the **Settings** button.



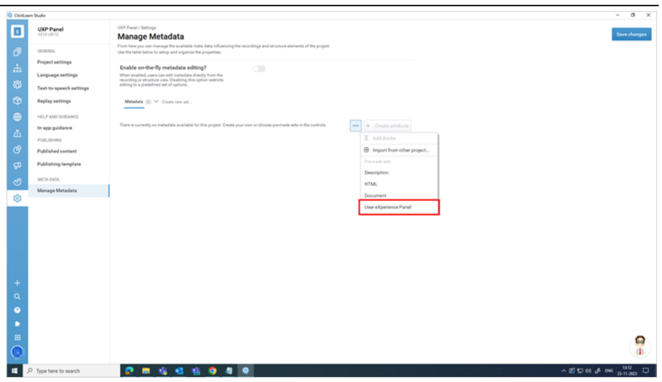
Click on the button **Manage Metadata.**



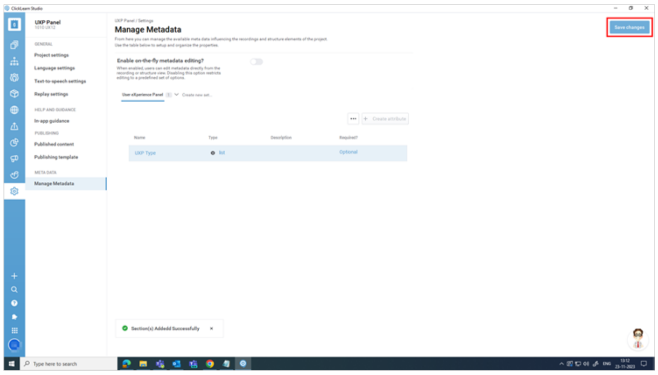
Click on the icon **Metadata more**.



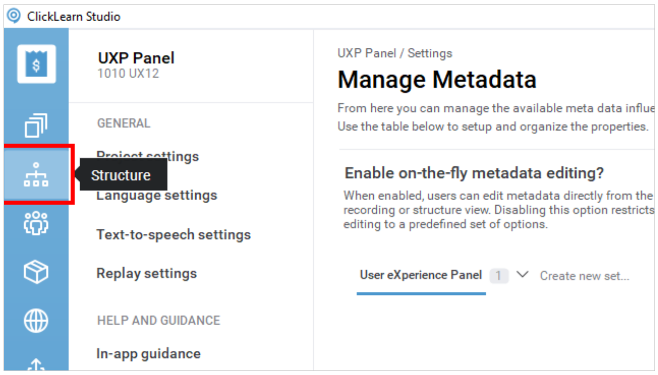
Click on the menu item, **User Experience Panel**.



Click on the button **Save changes**.

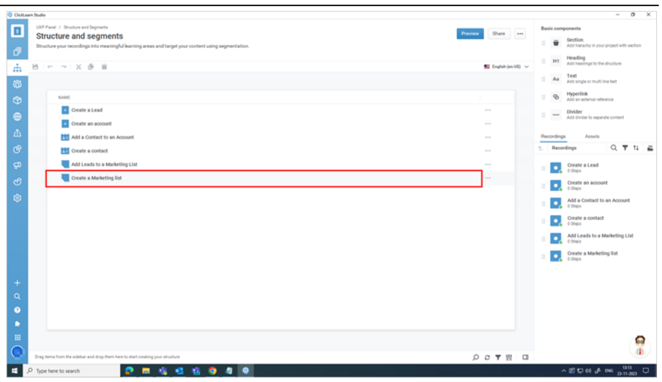


Click on the button **Structure**.

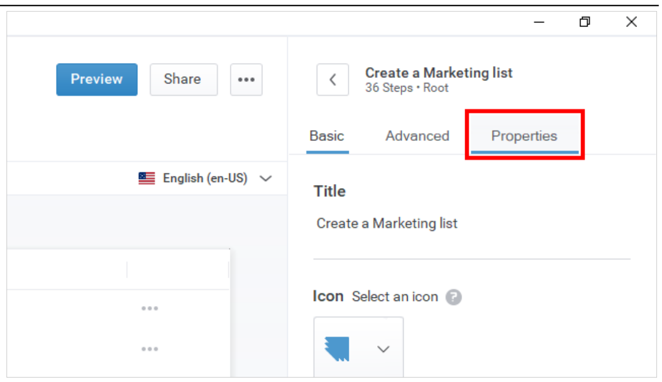


While using the UXP-type metadata, you must assign one or more recordings to that Metadata. So, to assign a recording to the UXP type metadata, select the recording you wish to assign.

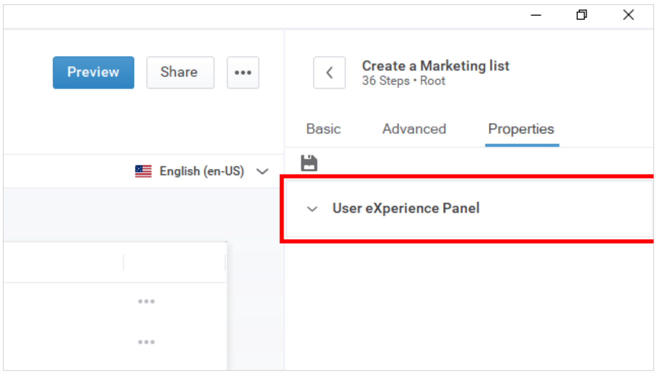
Click on the grid cell **NAME** with the value **Create a Marketing list**.



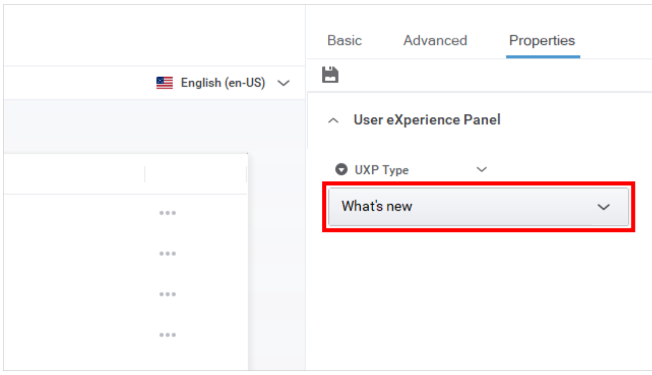
Click on the tab item **Properties**.



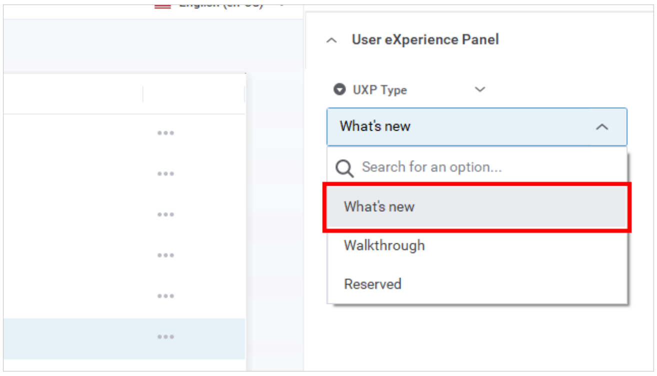
Click on the collapsible panel, **User Experience Panel**.



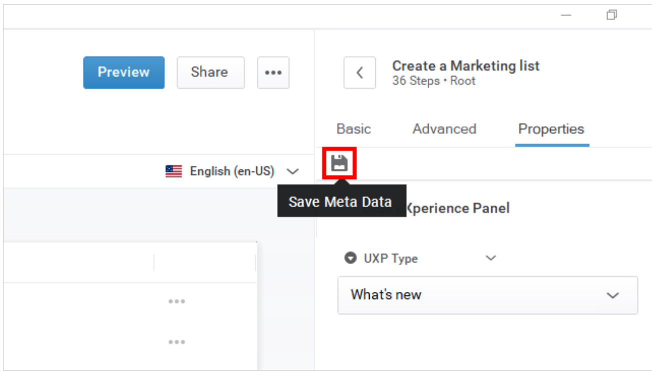
Click on the **Dropdown With Search.**



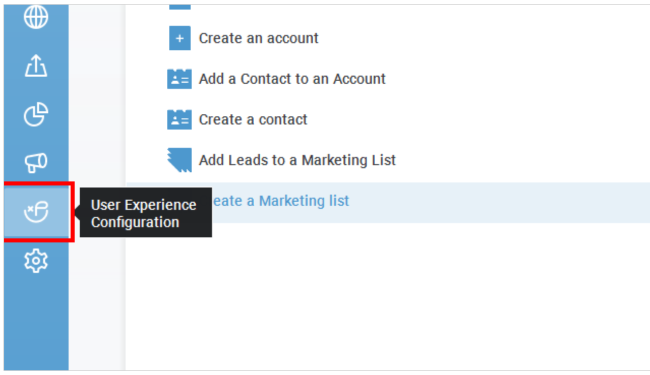
Click on the list view item **What's new**.



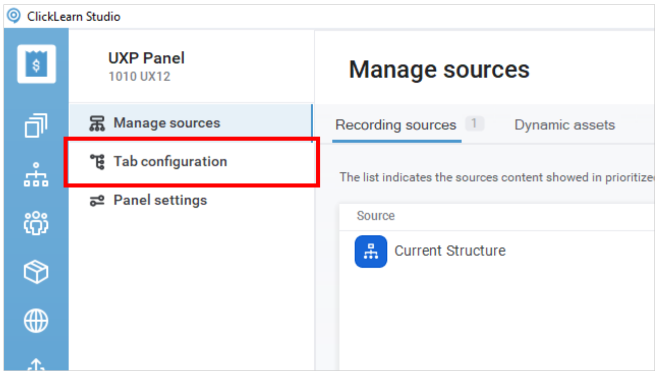
Click on the button **Save Meta Data**.



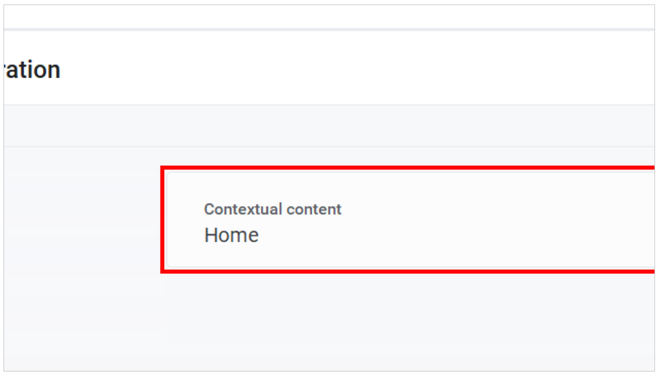
Click on the button **User Experience Configuration**.



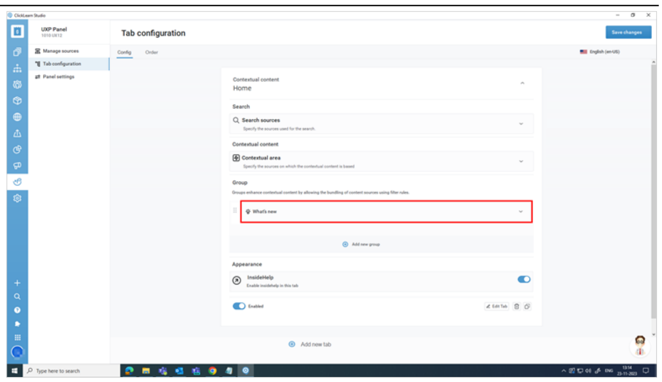
Click on the button **Tab configuration**.



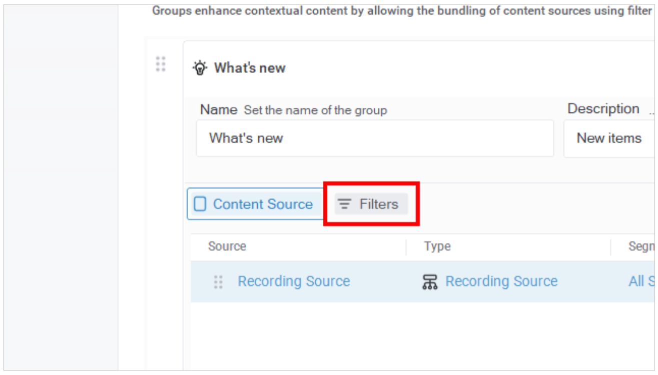
Click on the collapsible panel **Contextual content**.



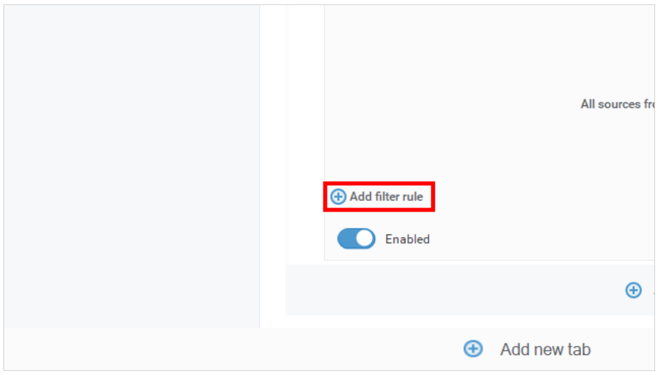
Click on the collapsible panel: **What's new**.



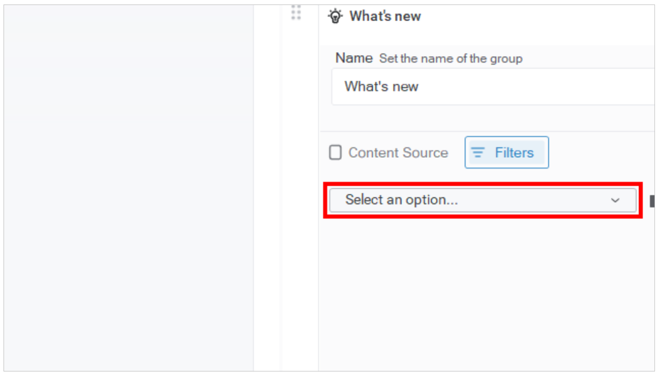
Click on the button **Filters**.



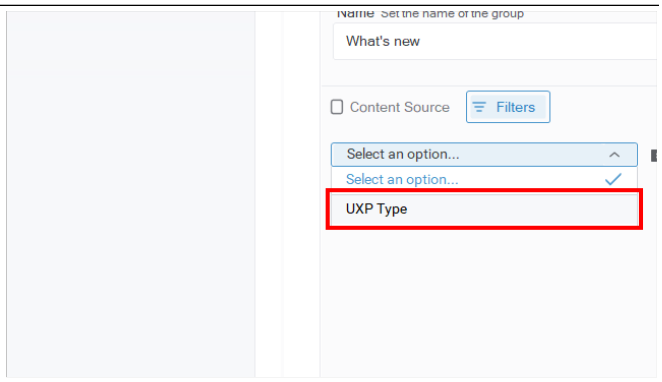
Click on the icon **Add filter rule**.



Click on the dropdown **Metadata**.

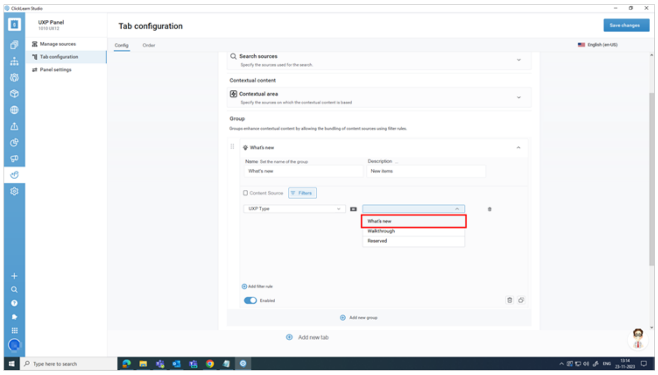


Click on the dropdown item **UXP Type**.

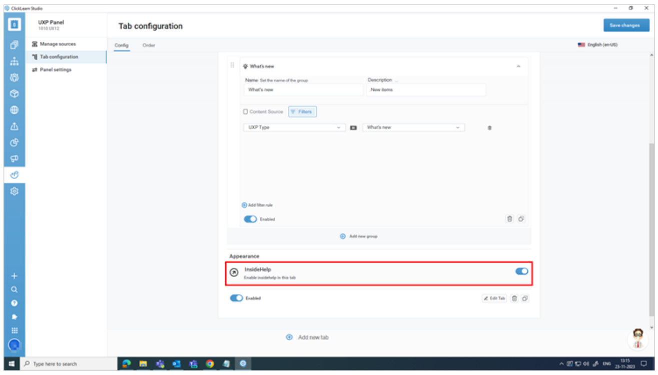


Click on the dropdown item **What's new**.

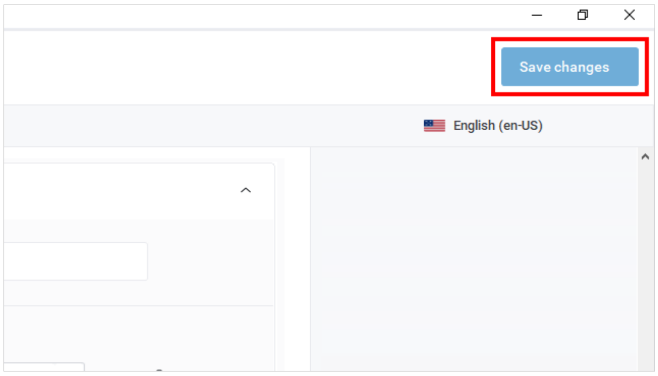
It will cater to the recording that you have assigned. The core function of filters is that users can split their recordings into three categories and add them as filters here. You can use custom metadata as filters, too.



Inside Help: You can disable this option if you do not wish to see the inside help tag.



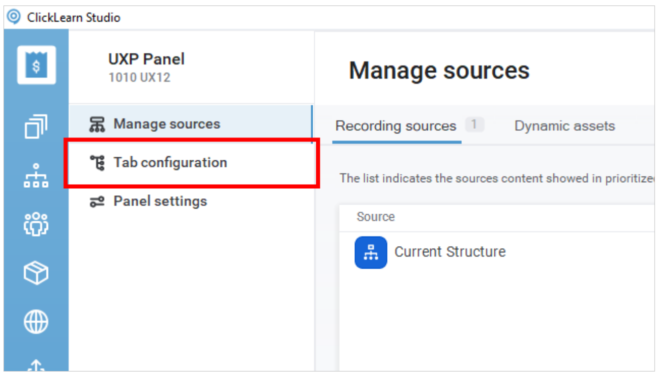
Click on the button **Save changes**.



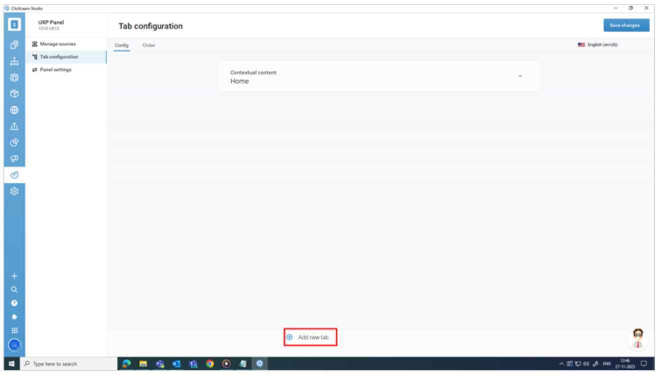
10.5.2. AI Chat

10.5.2.1. Steps to create an AI chat tab

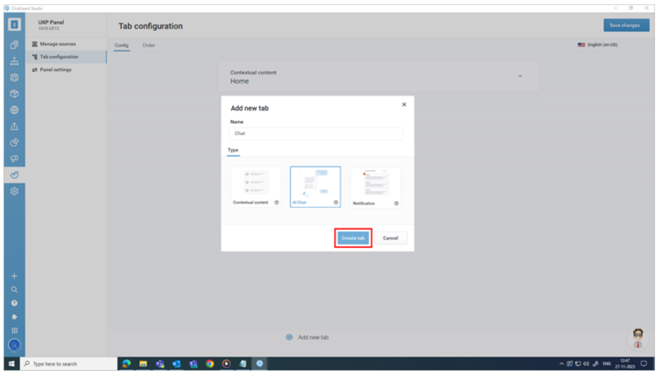
Click on the button **Tab configuration**.



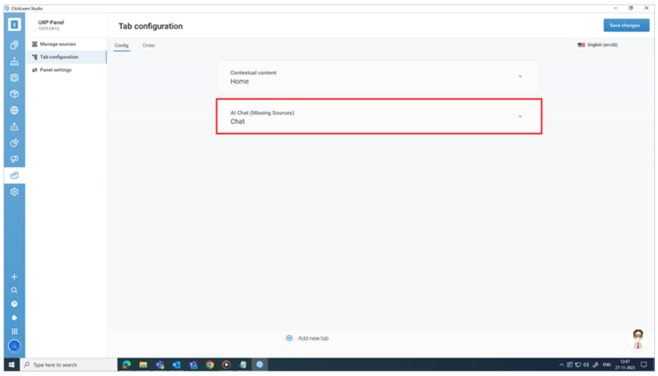
Click on the icon **Add new tab**.



You can name the tab based on your project requirements. In our case, we are creating an AI Chat tab called Chat. Type the tab's name and click the button to **Create tab**.

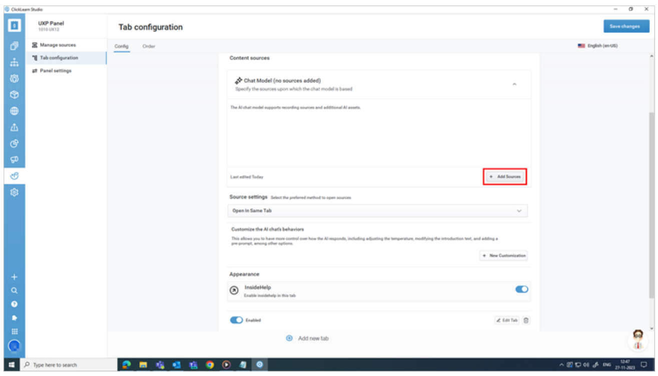


We have created the Chat tab. It says missing sources; we still need to add sources for this tab. Click on the collapsible panel **AI Chat (Missing Sources)**.

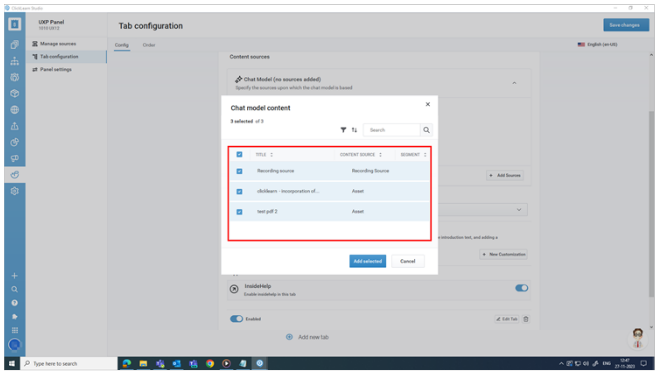


10.5.2.1.1. Adding Sources

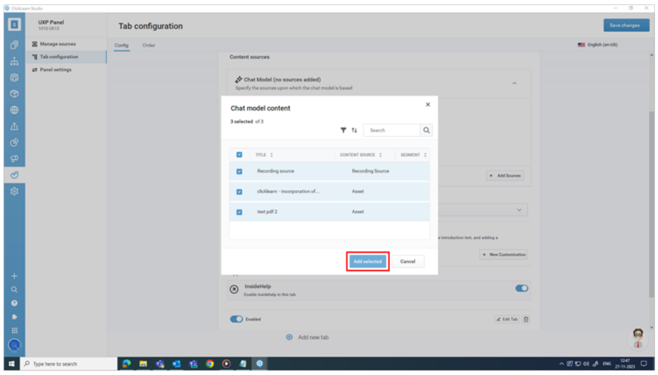
Click on the button **Add Sources**.



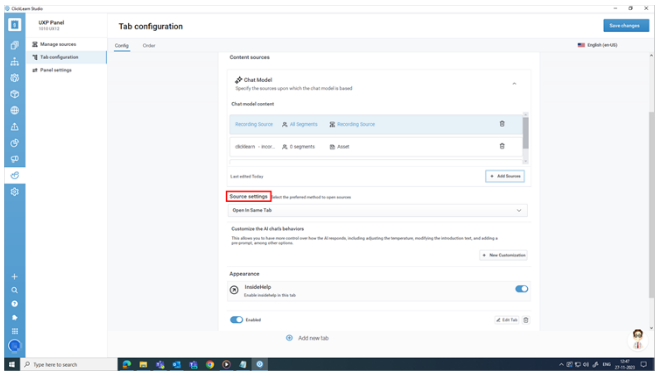
We will add all the recording sources and the assets we have configured in manage sources. YouTube-related content is not accessible in this Chat as it is word-based. It will generate answers from the PDFs and our recordings.



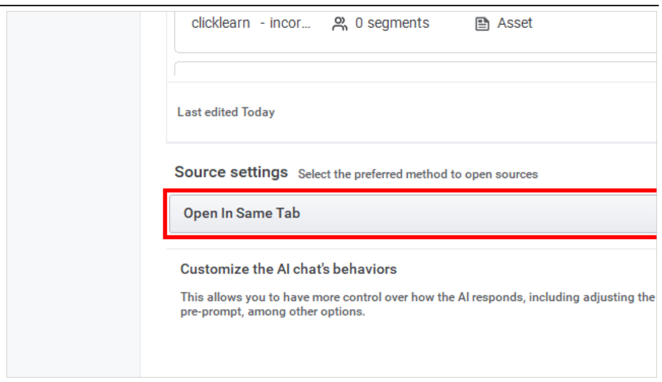
Click on the button **Add selected**.



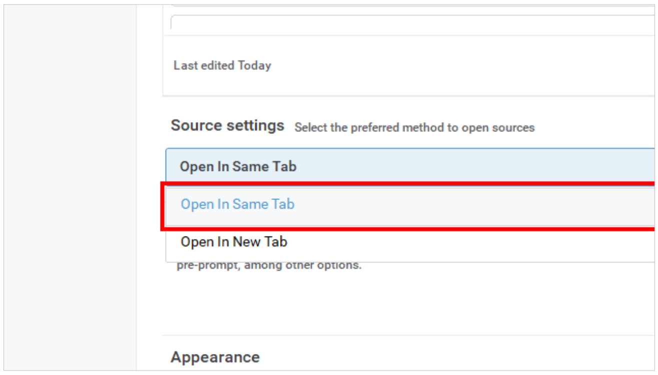
Click on the label **Source settings**.



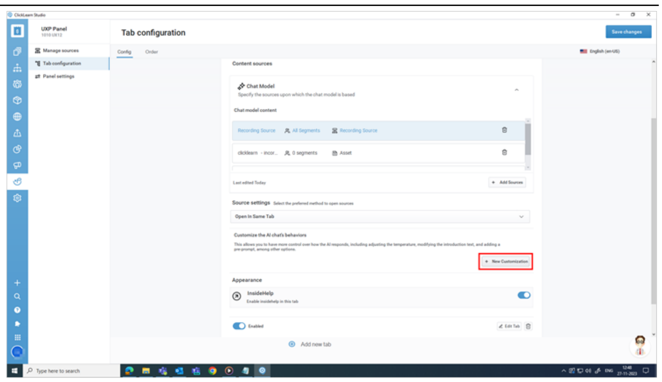
You can select the preferred method to open sources. Click on the dropdown **Source Setting**.



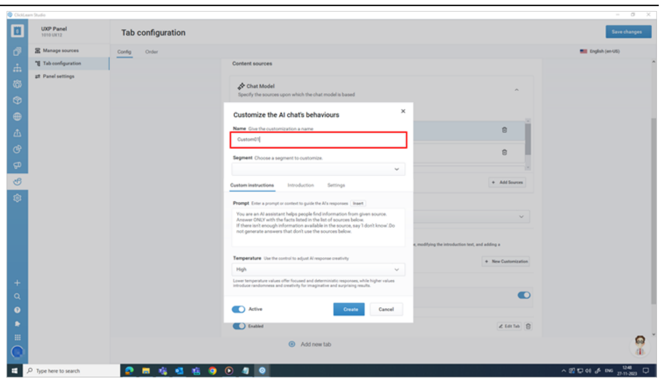
Click on the dropdown item **Open In Same Tab**.



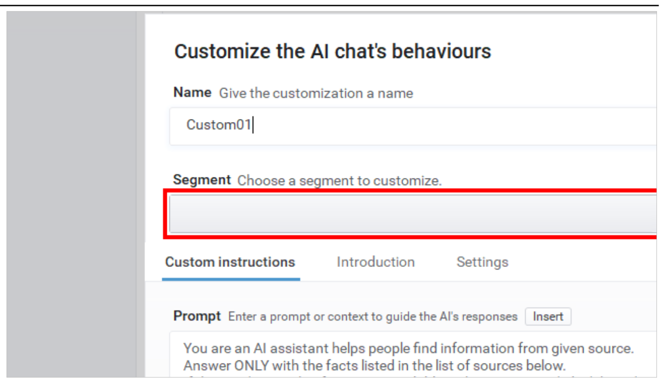
Customize the AI chat's behavior: This allows you to control how the AI responds, including adjusting the temperature, modifying the introduction text, and adding a pre-prompt, among other options. Click on the button **New Customization**.



Click on the textbox **AI Chat Name**. In our case, it is Custom01.

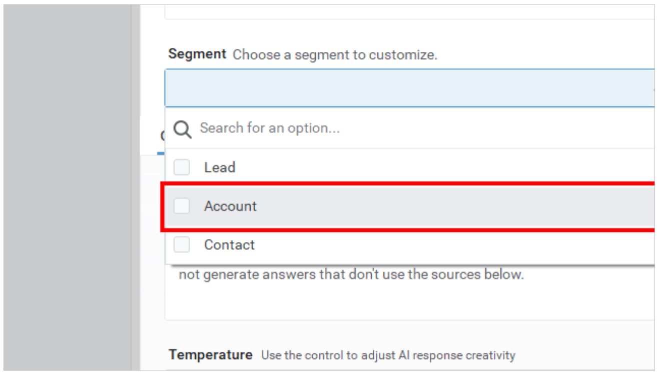


Click on the dropdown **Segment**. This allows you to choose a segment from the dropdown.

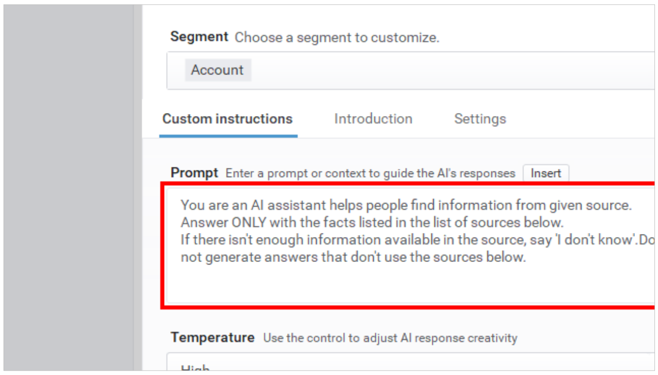


Click on the list view item **Account**.

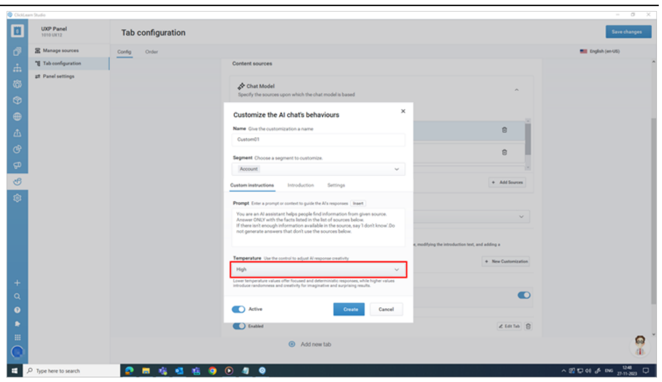
NOTE: If you do not choose any segment, it will target all the segments.



Prompt: You can add a prompt for the Chat. This acts as a default prompt. Click on the textbox **Prompt**.



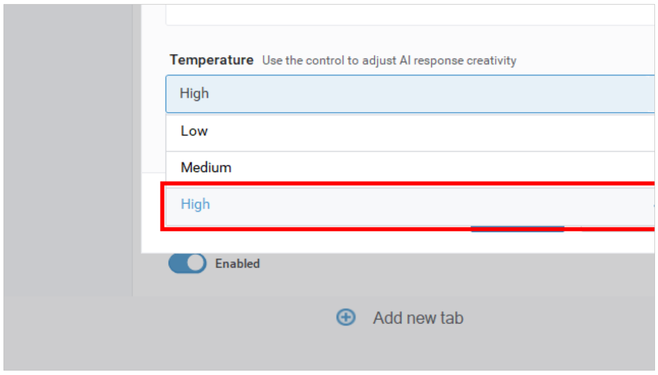
Click on the dropdown **Temperature**.



Temperature: There are three different temperatures available. Temperature is basically how creative the bot replies.

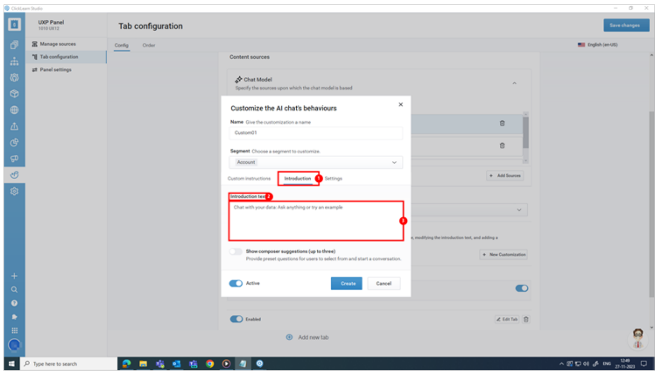
- **Low:** Low creative.
- **Medium:** Medium creative.
- **High:** High creative.

Click on the dropdown item **High**.

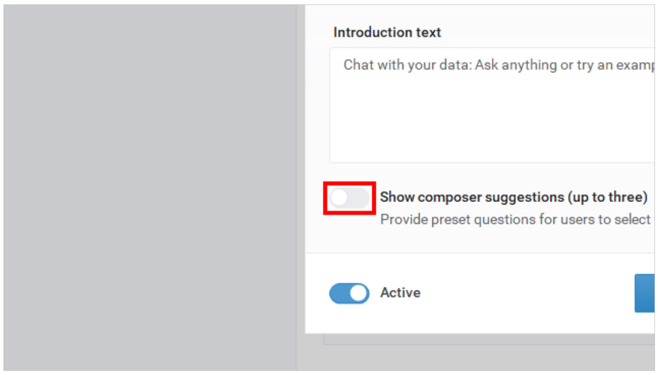


Introduction

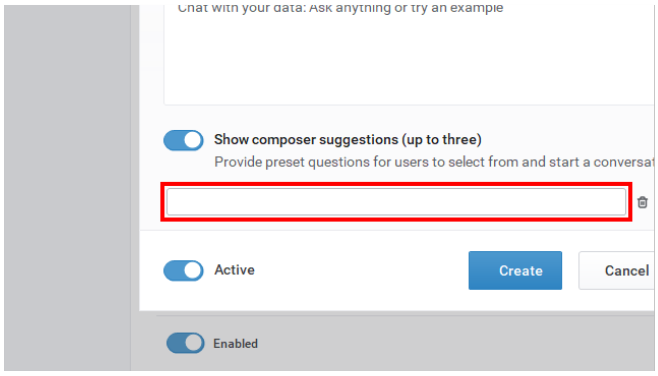
1. Click on the tab item **Introduction**.
2. Click on the label **Introduction text**.
3. You can add any introduction to the Chat. Click on the textbox **Instruction Text**.



Click on the toggle switch **Show Composer**.

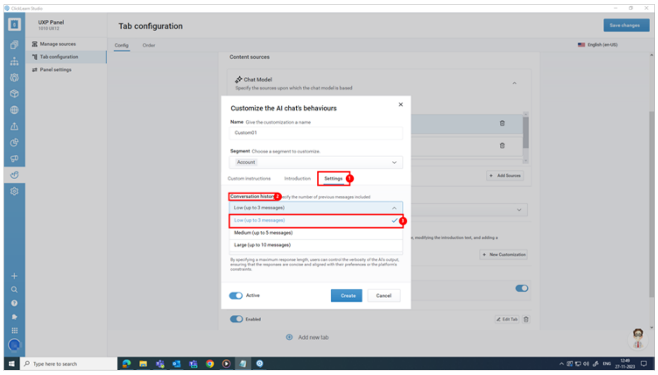


You can provide preset questions for users to select from and start a conversation. You can add three composer suggestions based on your project requirements. Click on the textbox **Text**.

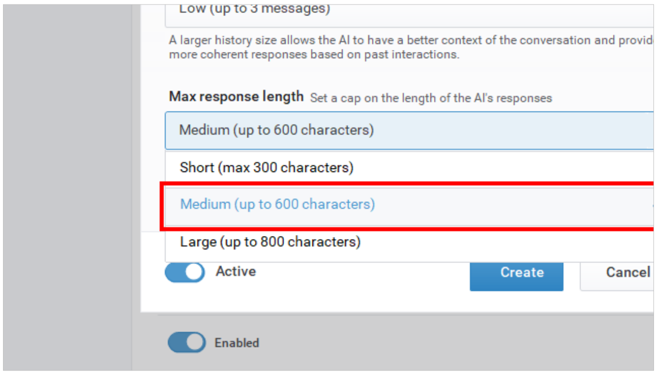


Settings

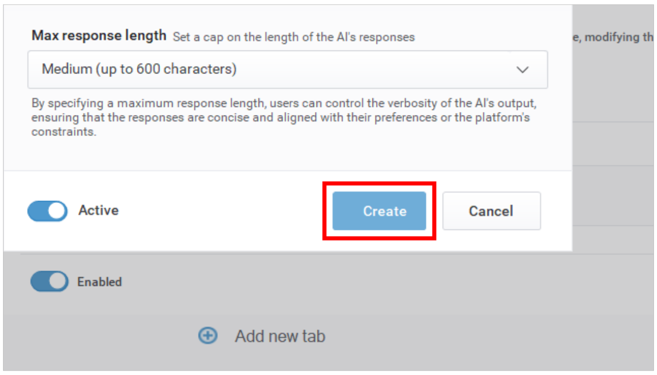
1. Click on the tab item **Settings**.
2. Click on the label **Conversation history**.
3. Click on the dropdown item **Low (up to 3 messages)**.



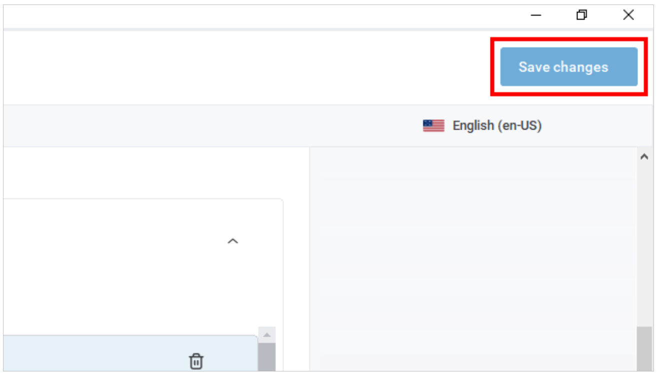
Max response length: You can cap the length of the AI's responses. You can select the options based on your requirements. Click on the dropdown item **Medium (up to 600 characters)**.



Click on the button **Create**.



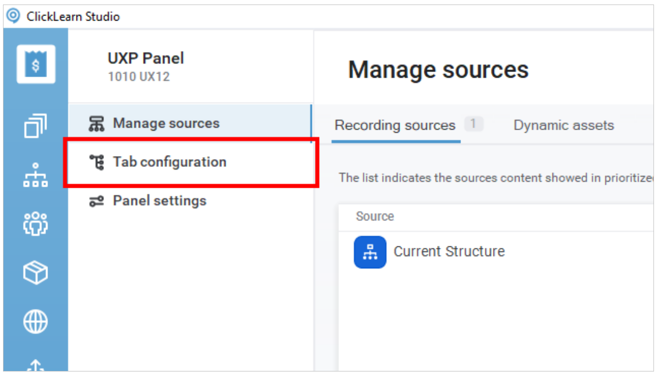
Click on the button **Save changes.**



10.5.3. Notifications

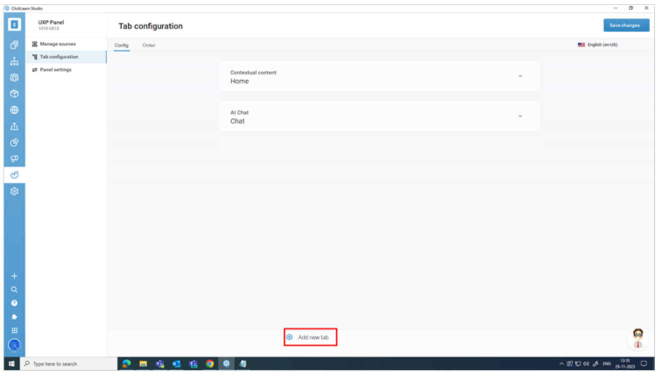
10.5.3.1. Steps to create the Notifications tab

Click on the button **Tab configuration**.

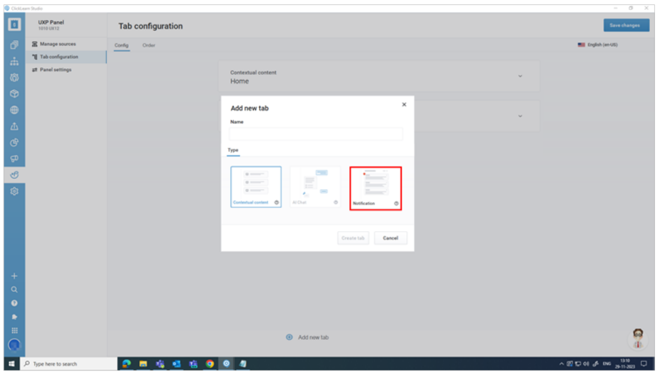


10.5.3.1.1. Config

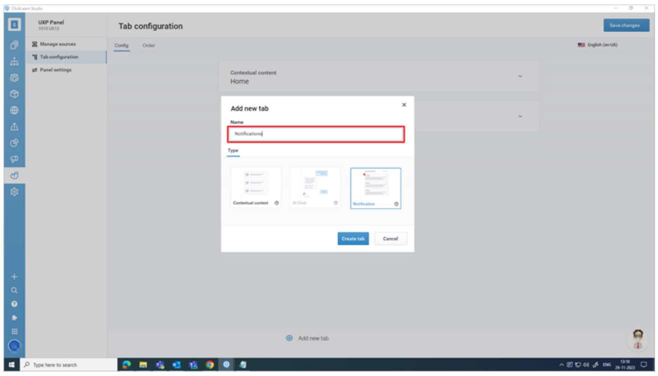
Click on the icon **Add new tab**.



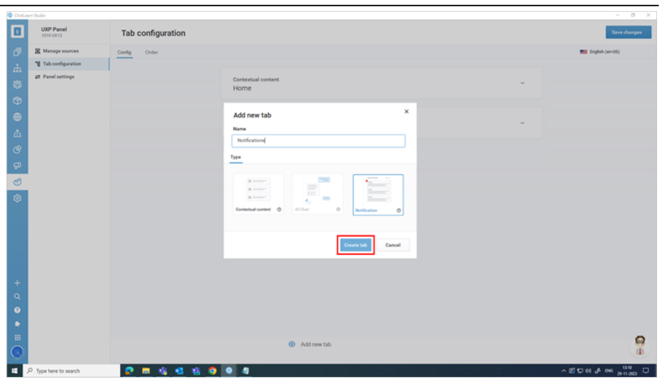
Select the **Notifications** tab.



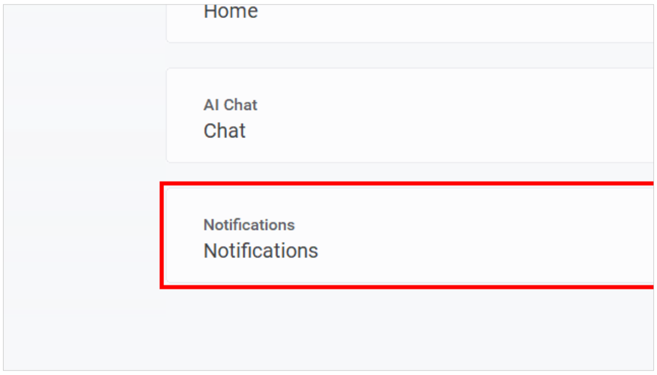
You can name the tab based on your project requirements. In our case, we are creating a Notification tab called Notifications. Click on the textbox **Tab Name** and type the tab's name.



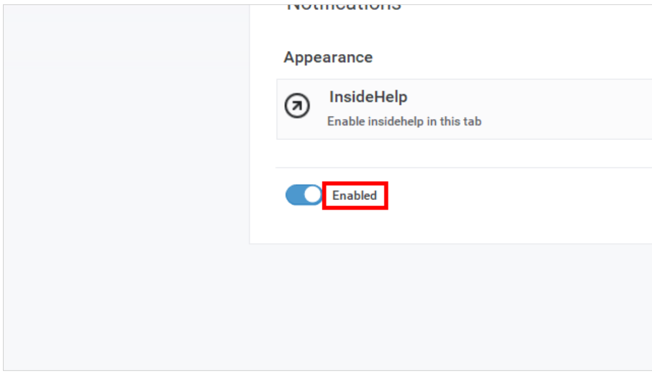
Click on the button **Create tab**.



Click on the collapsible panel **Notifications**.

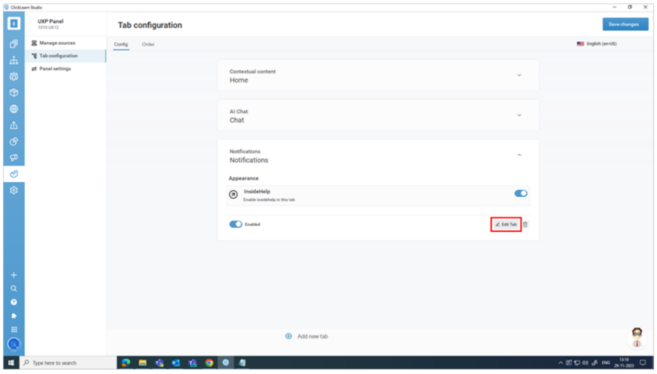


Click on the label **Enabled**. You can enable/disable the inside help.

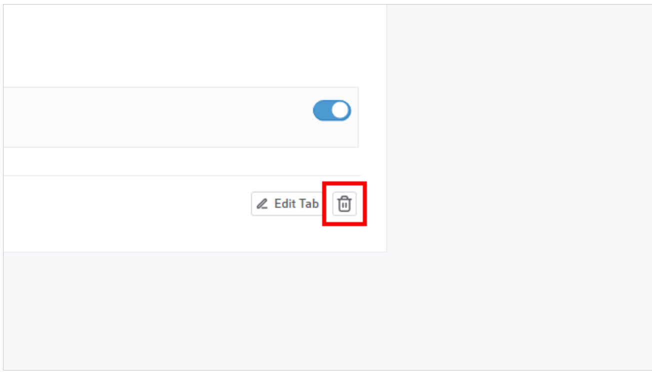


The User Experience Notification allows you to configure the notifications tab. We have the inside help option, which we can enable/disable from here.

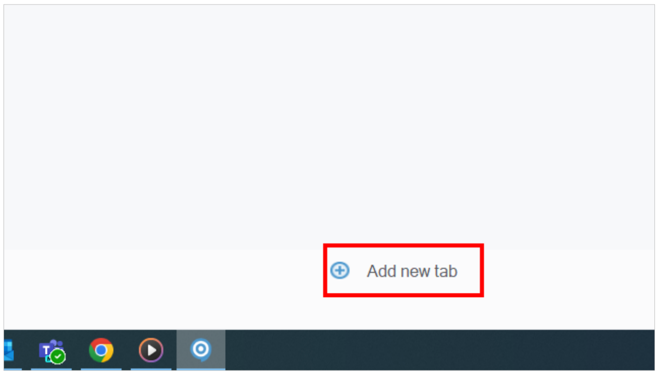
Edit Tab: This allows you to edit the tab.



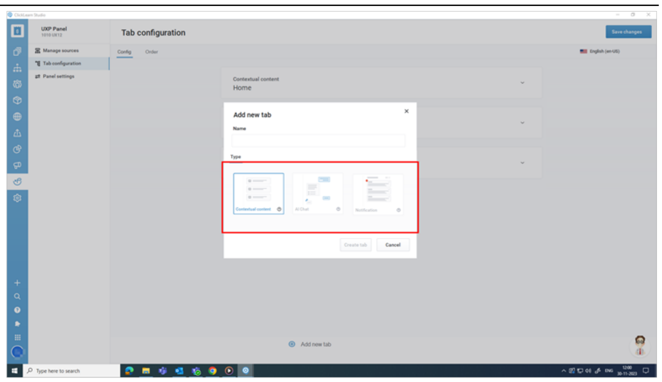
Delete: This icon deletes the tab.



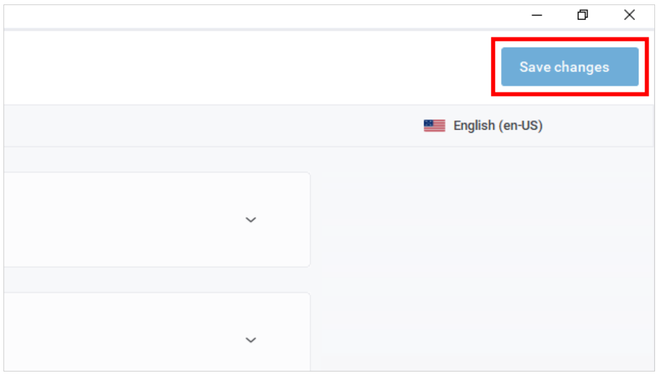
Click on the **Add new tab** again.



If you add a new tab again, you can see the AI Chat and Notifications tab are disabled. You cannot add multiple AI Chats and Notifications tabs, but you can add multiple Contextual content tabs. So basically, if you want to cater to Accounts in one contextual content and one for Contacts, you can do that.

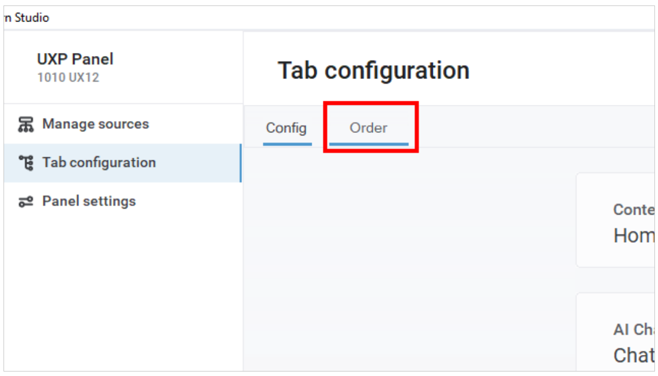


Click on the button **Save changes**.

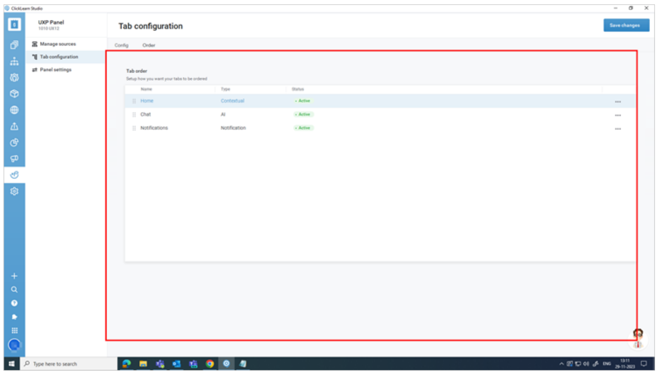


10.5.3.1.2. Order

Click on the tab item **Order**.

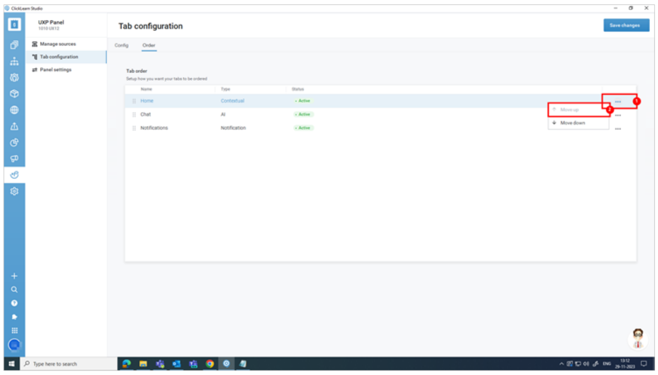


This displays the list of tabs you have configured.



Tab Order

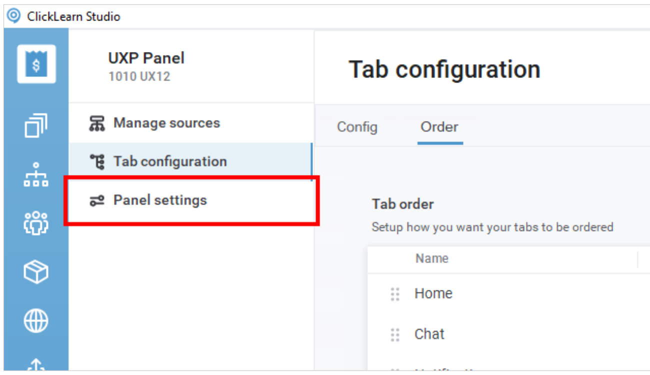
1. Click on the button **More Source** of grid cell **Action**.
2. Click on the menu item **Move up**. You can change the order up, and moving down will move it one step down.



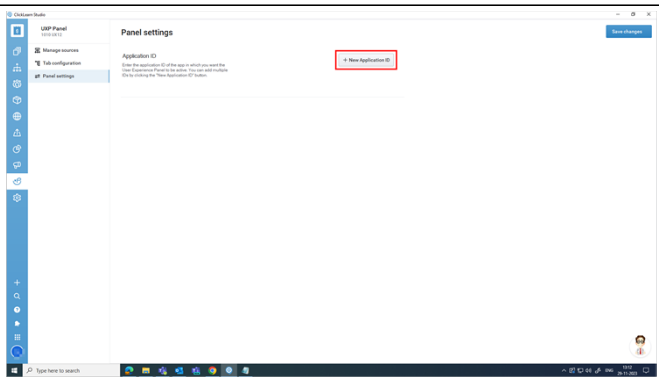
10.6.Panel Settings

10.6.1.1. Panel Settings

Click on the button **Panel settings**.

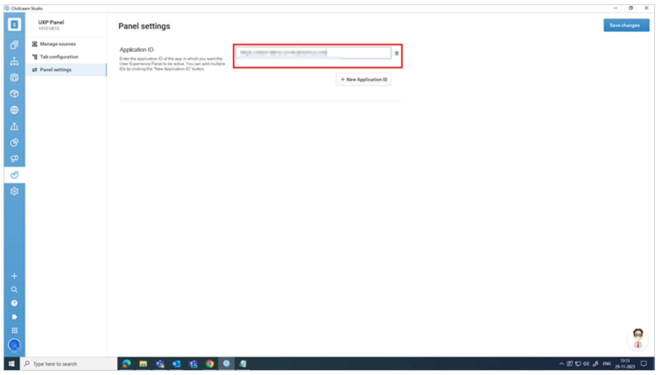


Application ID: Here, you need to enter the application ID of the app where you want the User Experience Panel to be active. It is the URL of the application. Click on the button **New Application ID**.

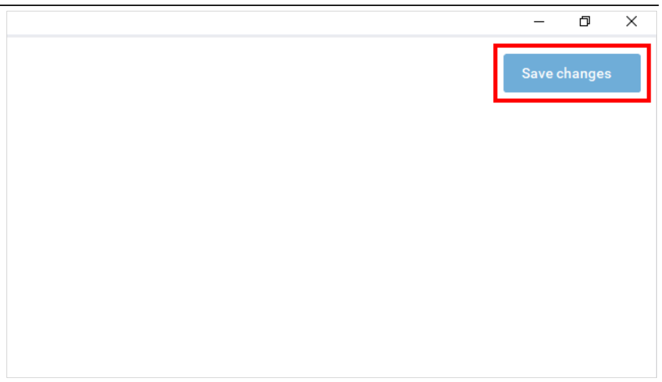


Click on the textbox **Text** and enter the URL or the application ID.

NOTE: You can add multiple IDs by clicking the New Application ID button.



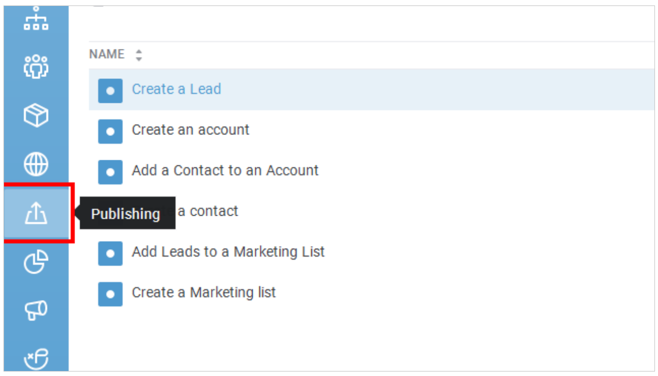
Click on the button **Save changes**.



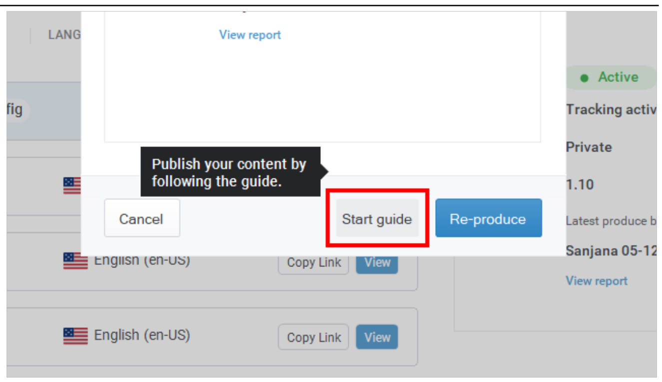
10.7.Produce and Publish

10.7.1. Introduction

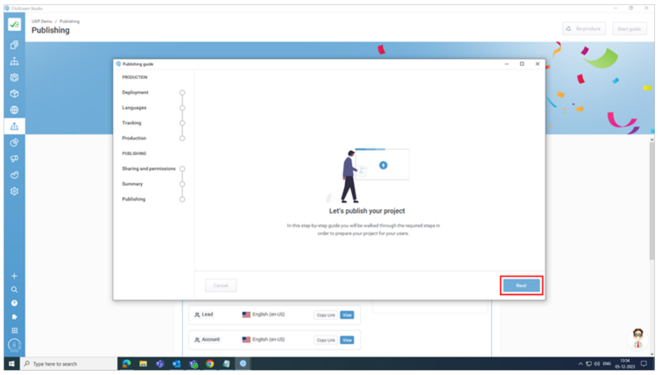
To reflect the UXP in the application we want, we must produce and publish it. Click on the button **Publishing**.



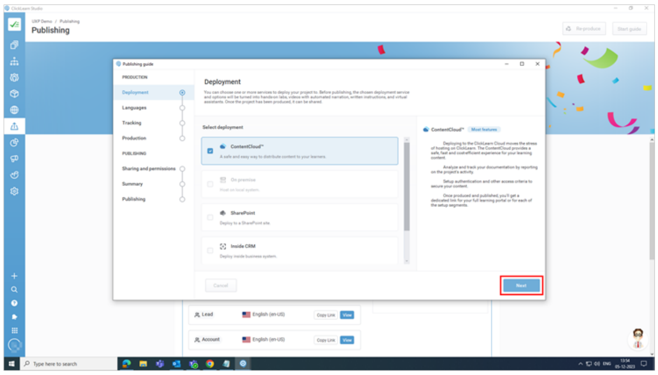
Click on the **Start guide** button.



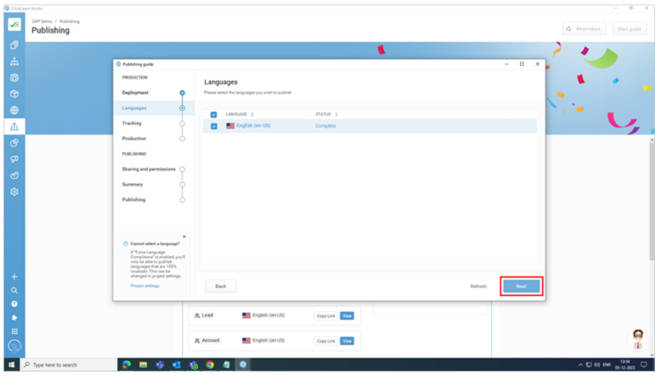
Click on the button **Next**.



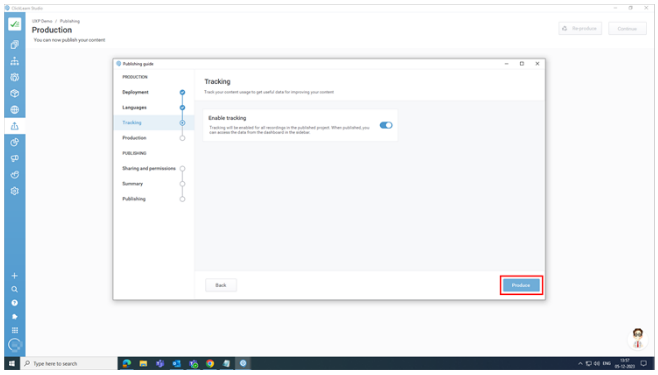
You can select the deployment options according to your requirements and click on the button **Next**.



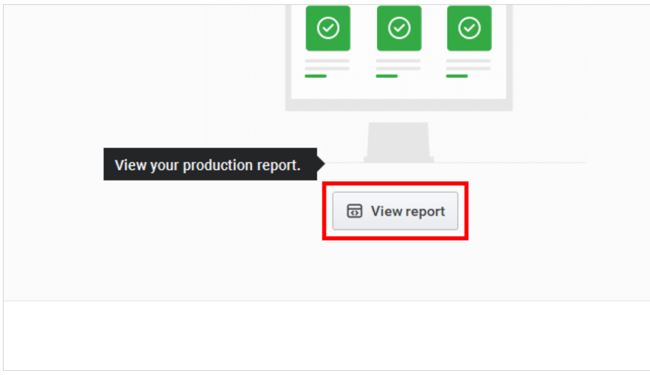
Click on the checkbox of the For Language selection and click on the button **Next**.



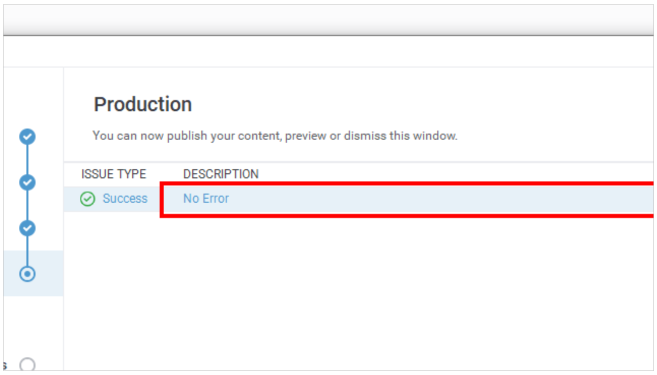
Click on the button **Produce**.



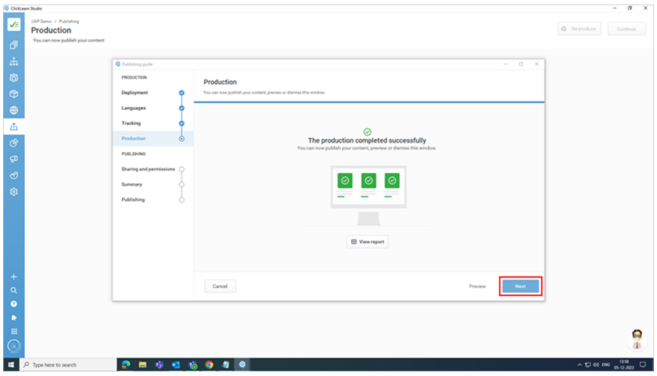
View report: Click on the button View report to see if there are any errors.



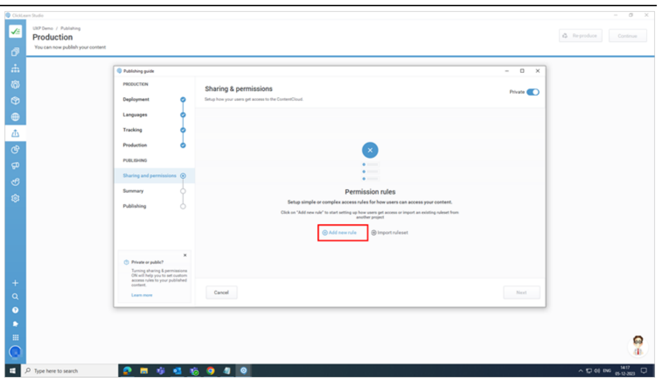
If there are errors, it displays the error description. Otherwise, it shows **No Error**.



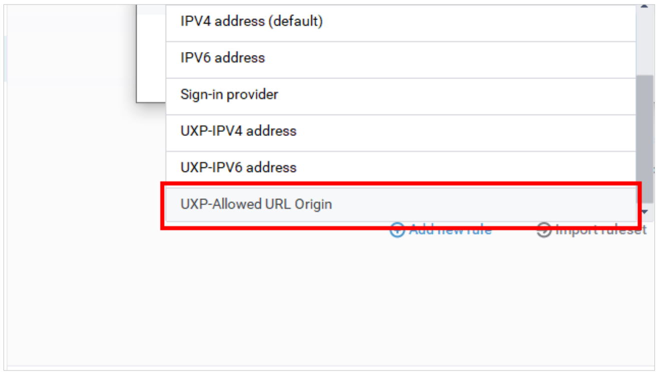
Click on the button **Next**.



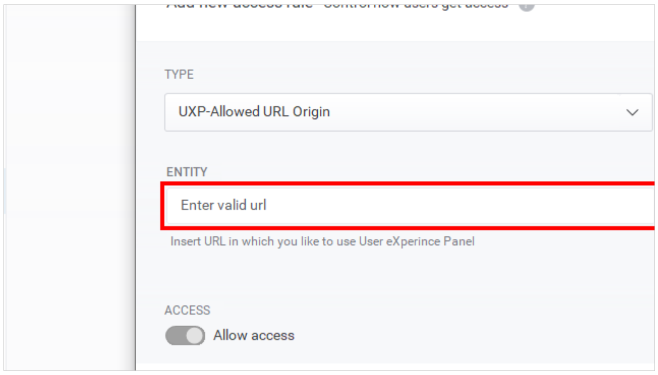
In the Sharing and Permissions section, click the button to **Add New Rule.**



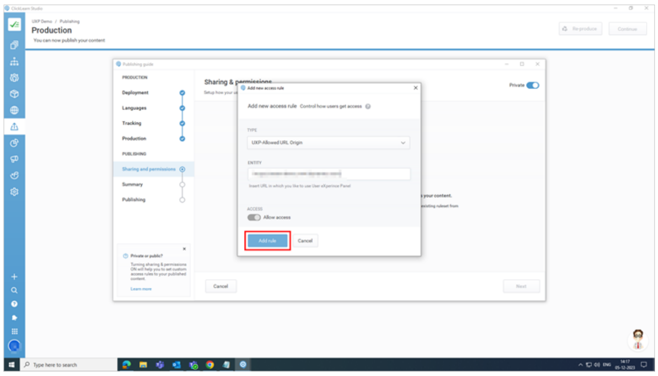
Click on the dropdown item **UXP-Allowed URL Origin**.



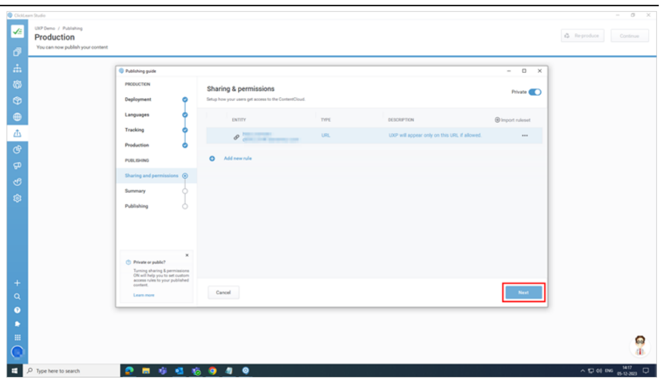
Click on the textbox **URL Origin.** You must enter the application **URL** where you wish to see the UXP.



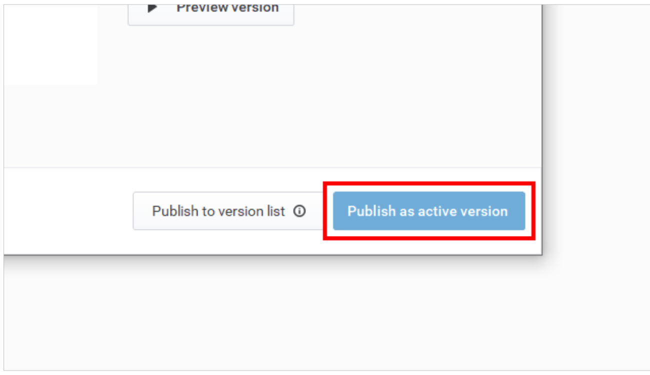
Click on the button **Add rule**.



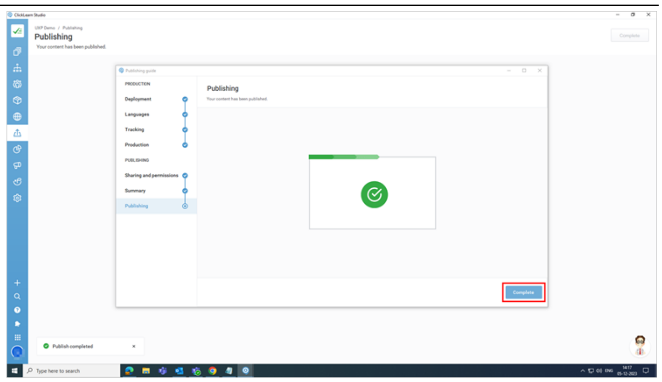
Click on the button **Next.**



Click on the button to **Publish as active version.**

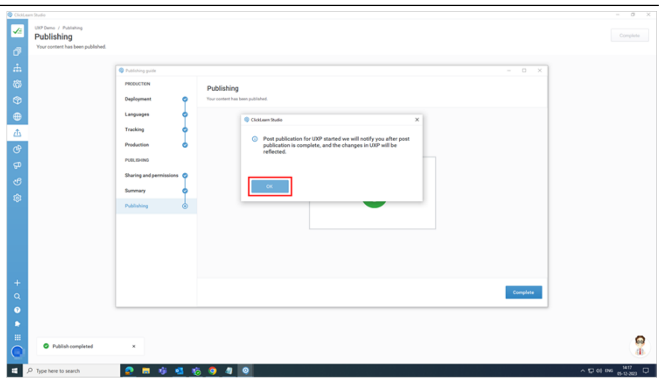


When you have published everything, click on the button that says **Complete**.



A popup dialog box will show you that the UXP post-publication is in progress and will inform you when it is complete. Press **OK** to continue.

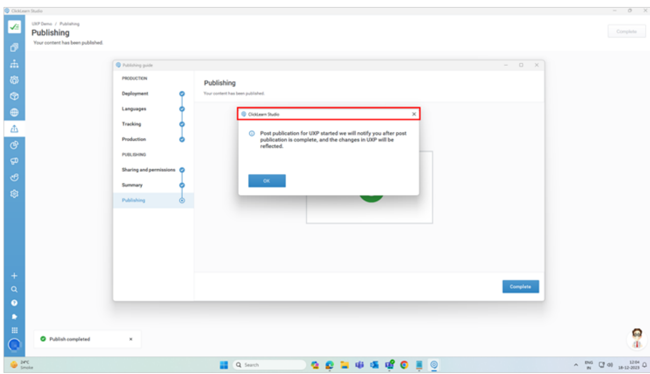
NOTE: Every time you make changes to your project, you need to produce and publish your project again.



10.8.Publishing Experience

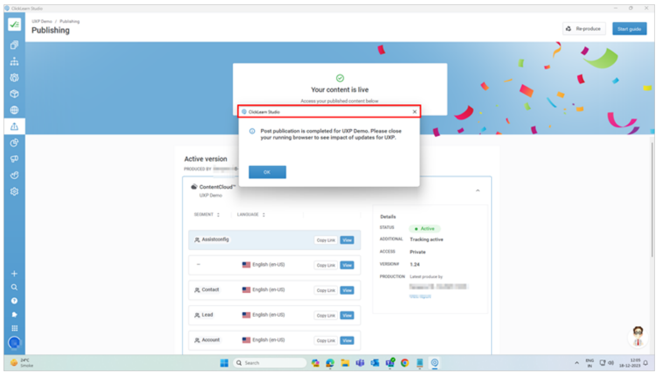
Once you produce and publish the project, a popup dialog box shows up that says Post-publication for UXP has started, and ClickLearn Attain will notify you once it is complete.

Wait for the next popup to appear. The post-publication process usually takes 10-15 minutes.



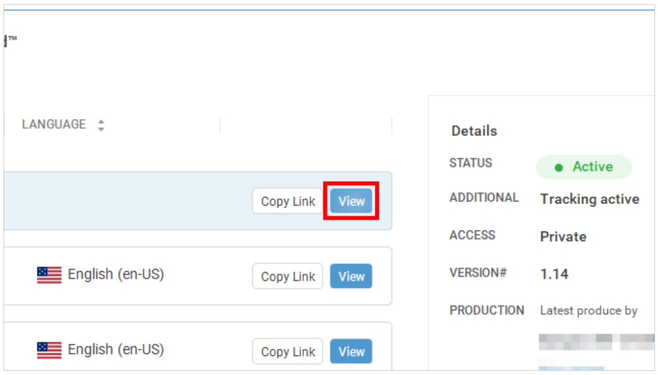
After a while, another dialog box pops up that indicates the post-publication is complete. You can now restart your browser and check the UXP Panel.

Every time you make changes to your project, you must produce and publish your project to reflect the changes in the UXP panel.

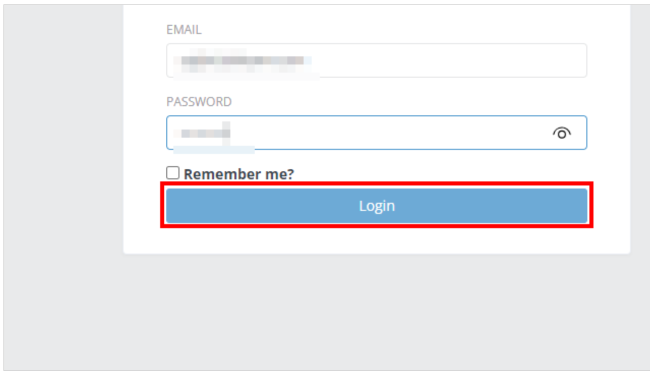


10.9.Assist Configuration for UXP

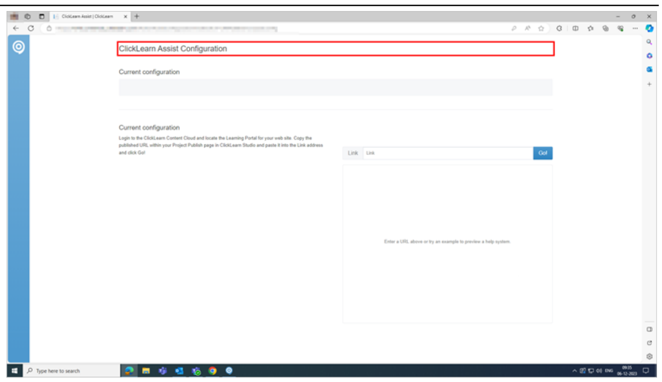
Once the project is published, you must configure using the Assist configuration link if you have not added the link in **UXP-Allowed URL Origin** while publishing. Click on the button **View** of grid cell **Action**.



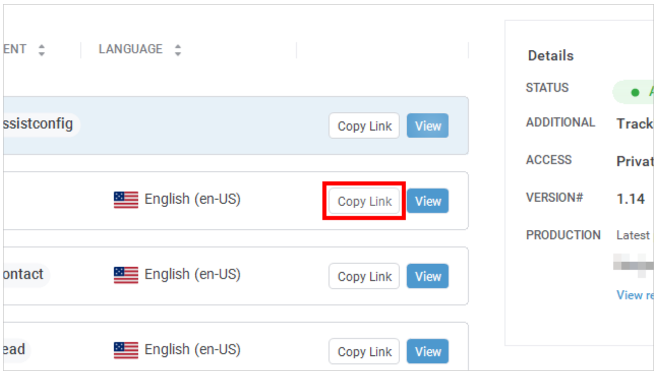
You must log in with your credentials and click the **Login button**.



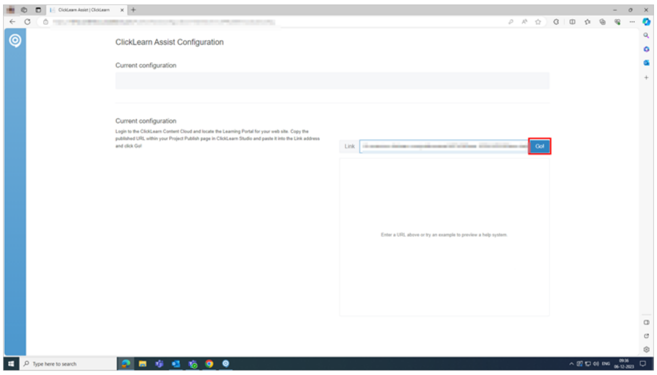
To make sure the UXP works appropriately, we need to configure the assist. This screen indicates the **ClickLearn Assist Configuration** is missing.



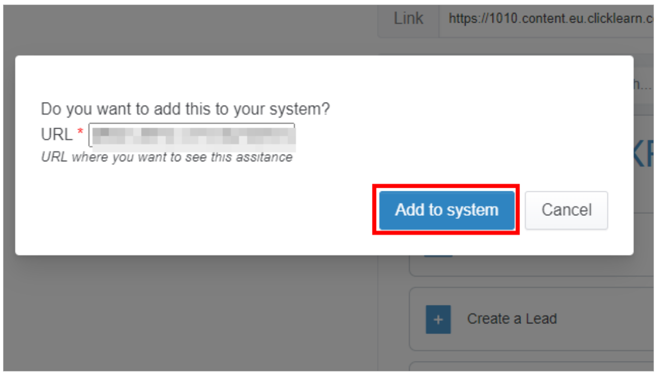
Click on the button **Copy Link** in publishing and go back to the assist configuration.



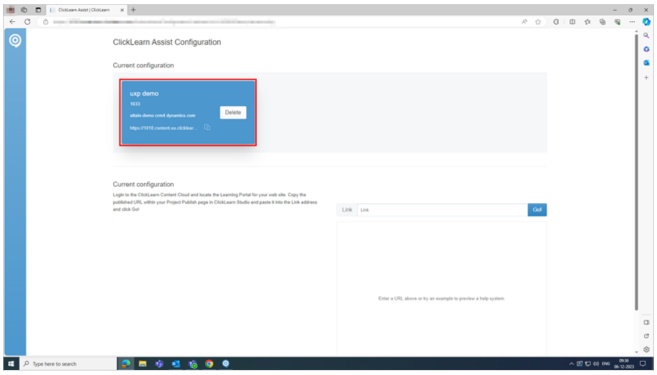
Click on the input field Link, enter the URL, and click on the button **Go!**



Enter the **URL** where you want to see the User Experience Panel. Click on the button **Add to system**.



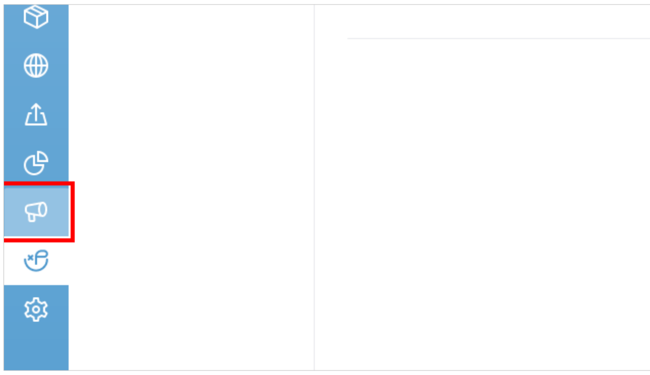
This screen indicates the assist configuration is complete.



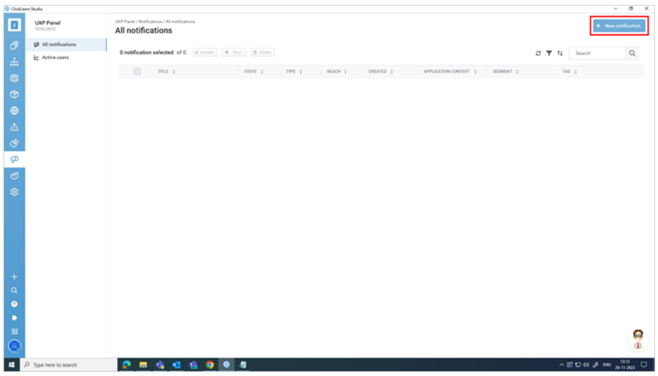
10.10. Adding Notifications

10.10.1. Adding Notifications

Click on the button **User Experience Notifications**.



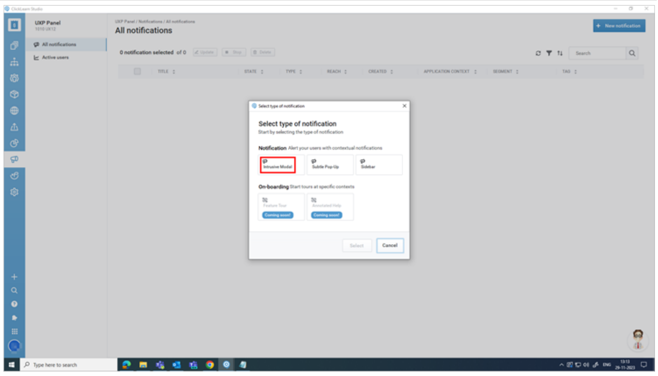
Click on the button **New notification**.



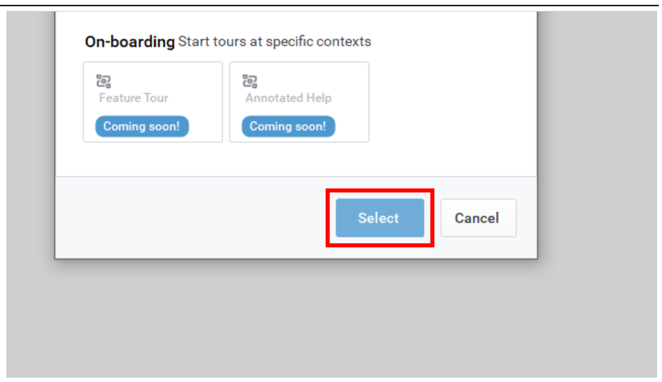
There are three different types of notifications.

- **Intrusive Modal:** The one that pops up in the beginning.
- **Subtle Popup:** This notification appears at the bottom right corner of the UXP panel.
- **Sidebar:** This is the one that appears in the sidebar.

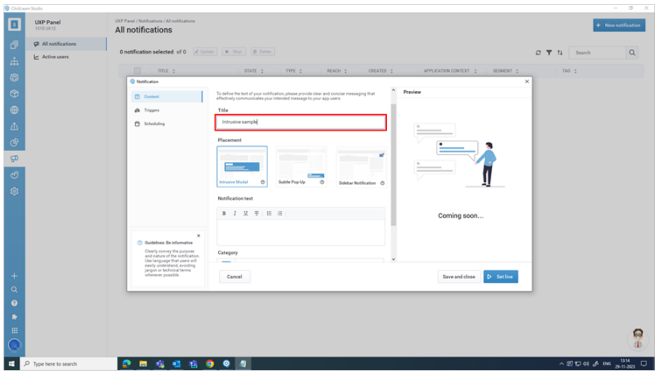
Click on the label **Intrusive Modal**.



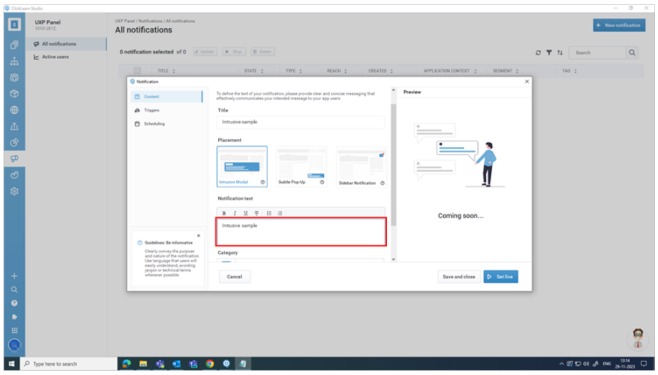
Click on the button **Select**.



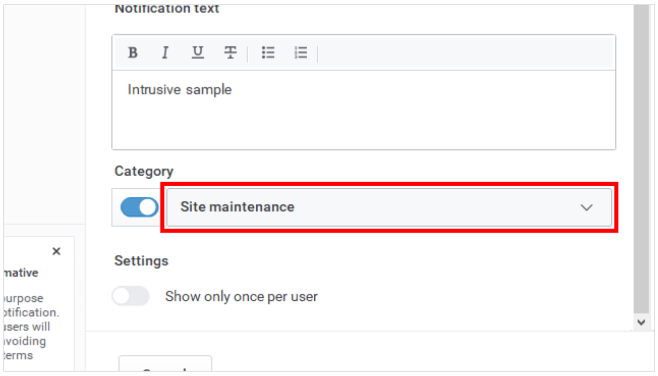
Click on the textbox **Title** and provide a name for the notification.



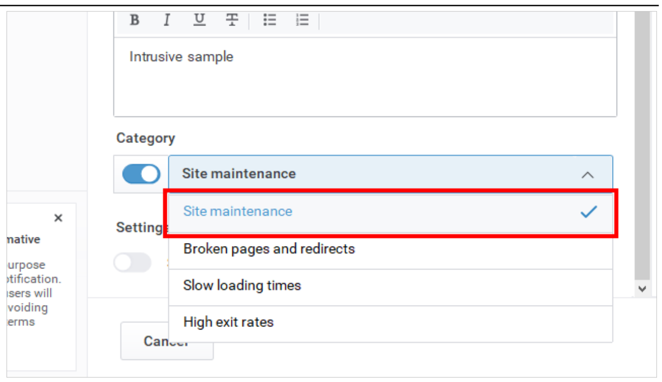
Notification Text: To provide a notification text, click on the text editor **Content** and type the notification text.



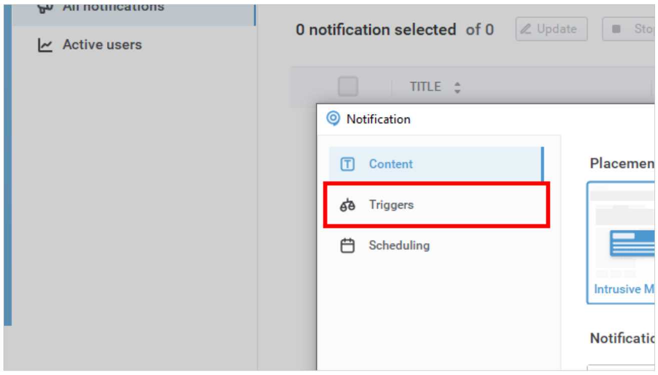
Click on the dropdown **Category**.



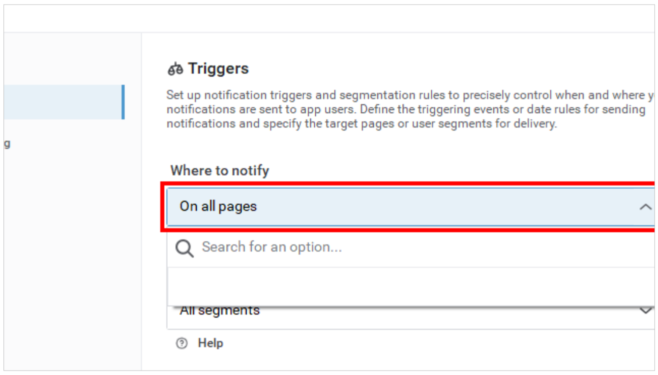
Select **Site Maintenance**.



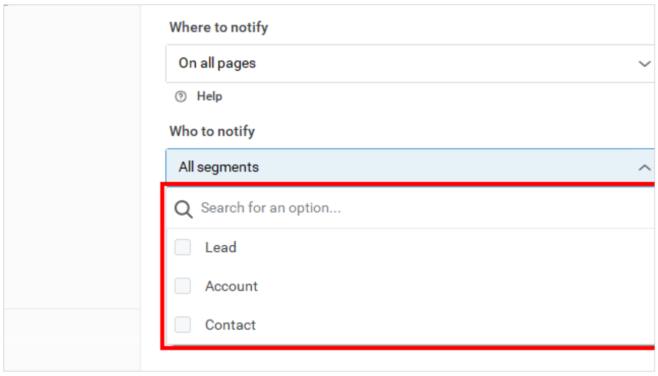
Click on the button **Triggers**.



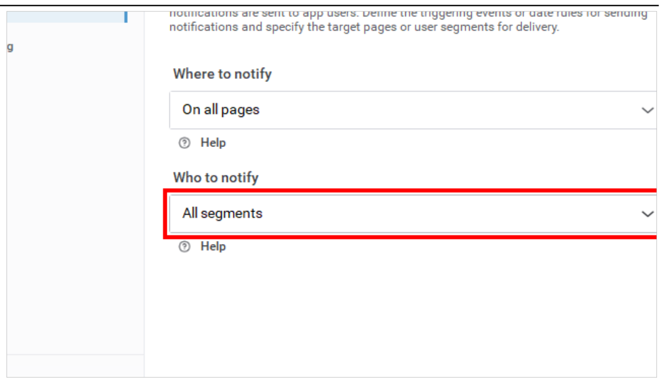
Click on the dropdown **Where to notify** and select On all pages.



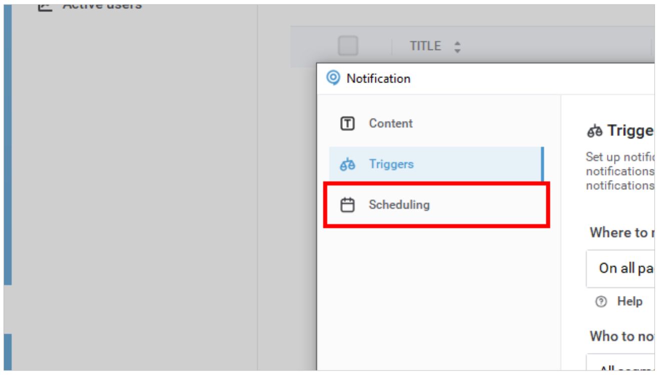
Click on the dropdown **Who to notify** and select **All segments**. You can include the segments you wish to have.



Here, we have selected **All segments**.



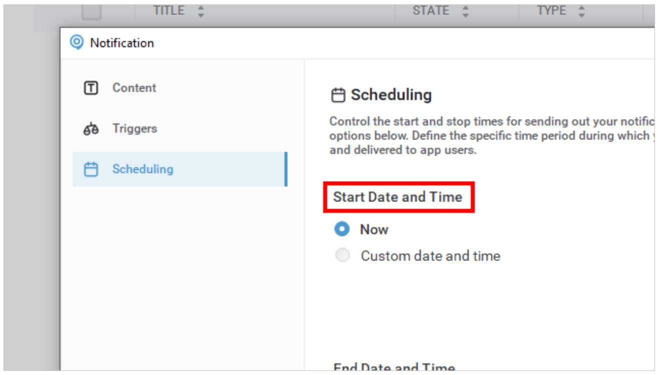
Click on the button **Scheduling**.



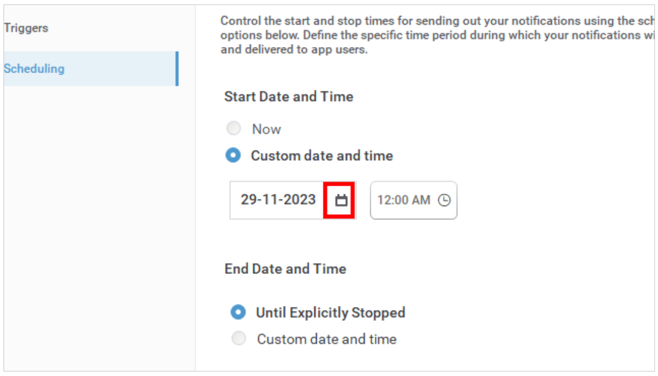
Click on the label **Start Date and Time.**

Scheduling: Scheduling offers you with two options.

- **Now:** You can set it live now.
- **Custom date and time:** This option allows you to set the custom start date and time.

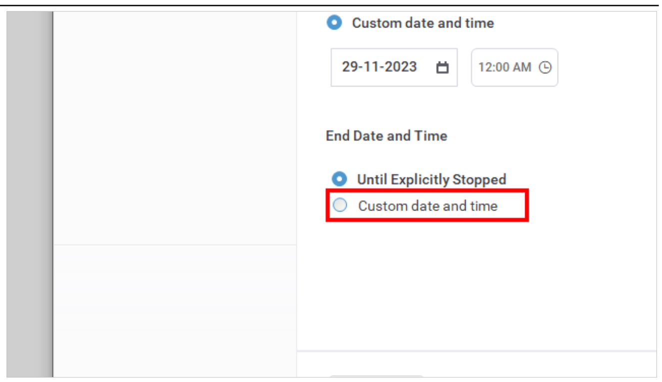


Select a custom date and time that suits your project requirements. To choose a custom date, click on the calendar icon.

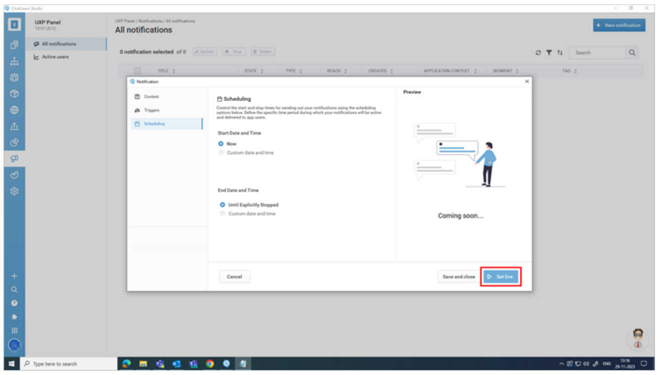


End Date and Time: You can choose the option until explicitly stopped.

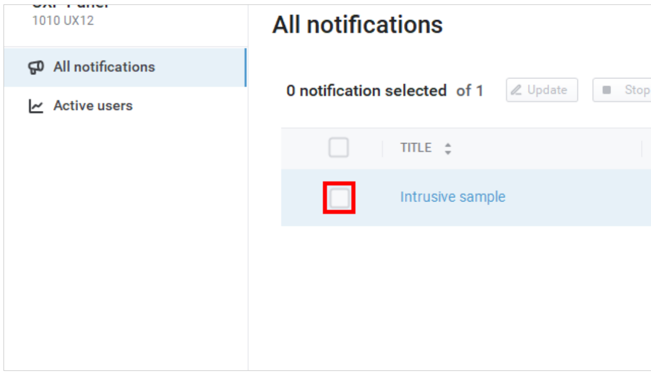
Click on the option **Custom date and time**. You can select the Custom Date and Time.



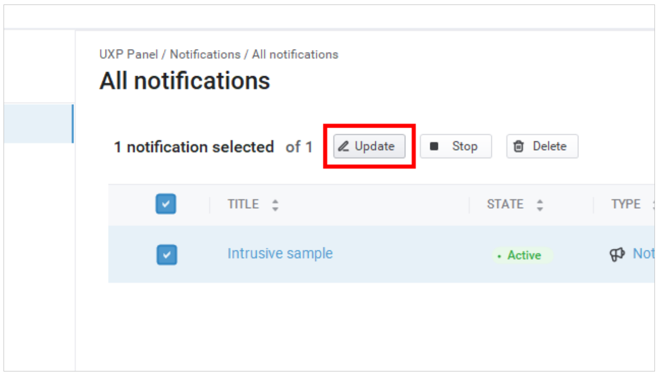
We have chosen the Start Date and Time as **Now** and the End Date and Time **Until Explicitly Stopped**.
Click on the button **Set live**.



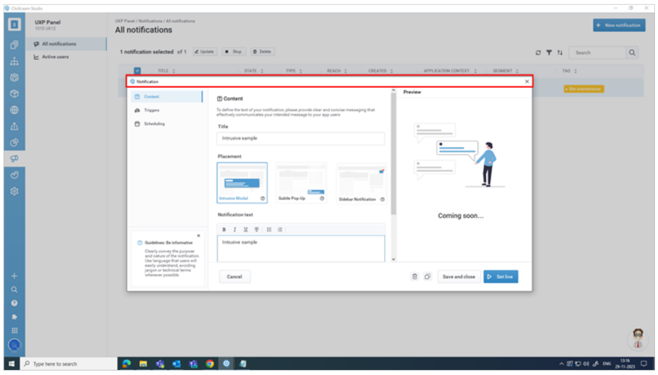
Click on the **checkbox** of the grid cell.



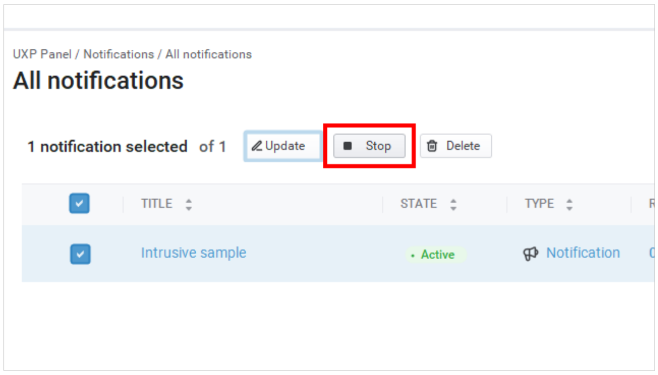
Click on the button **Update**.



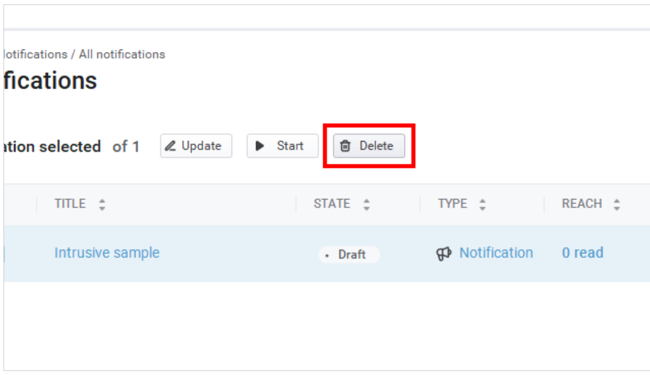
You can update the notification and click on the button Set live.



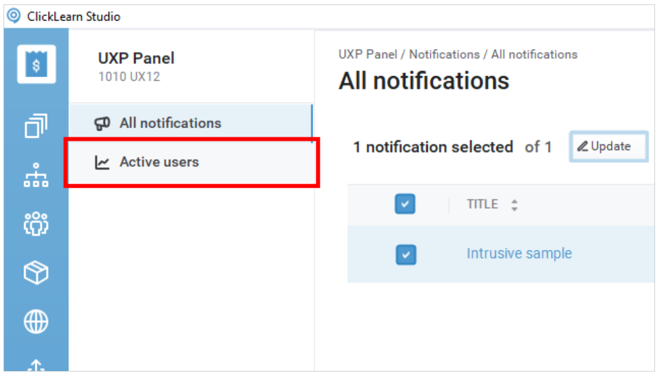
Click on the button **Stop** to stop the notification.



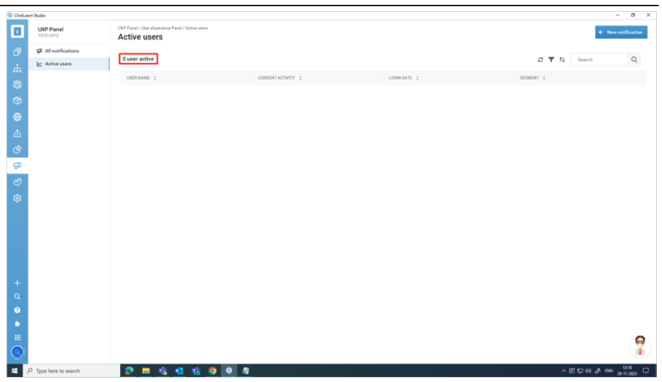
Delete: This deletes the selected notification.



Click on the button **Active users**.



Active users: It says 0 users active. Based on the people using UXP, it will display the active users around 30 minutes before using the UXP. This shows what activity the user did. For example, if the user was in the accounts section, it will display that the user was in the accounts section. That's what active users are all about.



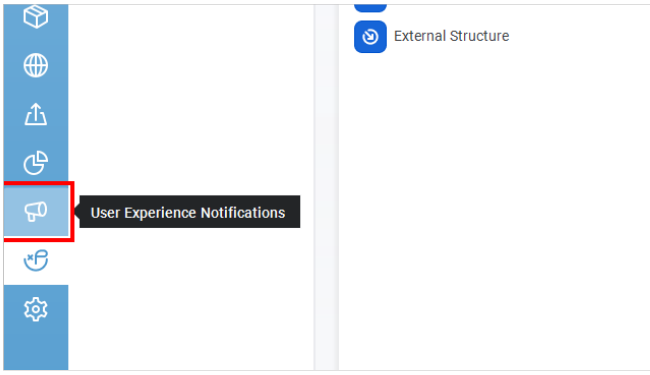
10.11. Types of Notifications

10.11.1. Adding Notifications

There are three types of notifications in ClickLearn Attain.

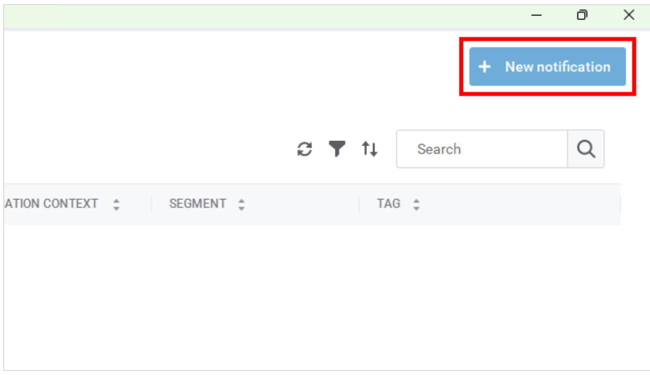
- Intrusive Modal
- Subtle Pop-Up
- Sidebar

Listed below are the steps for configuring these notifications.
Click on the button **User Experience Notifications**.

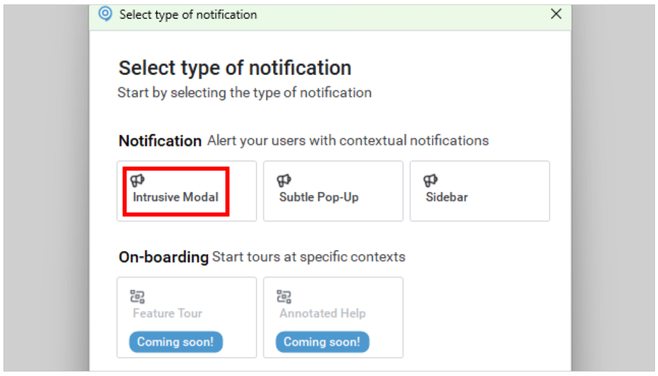


10.11.1.1. Intrusive Modal

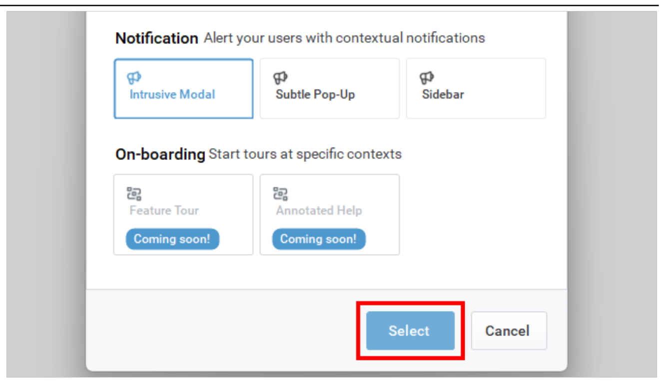
To create an intrusive modal notification, click on the button **New notification**.



Click on the label **Intrusive Modal**.

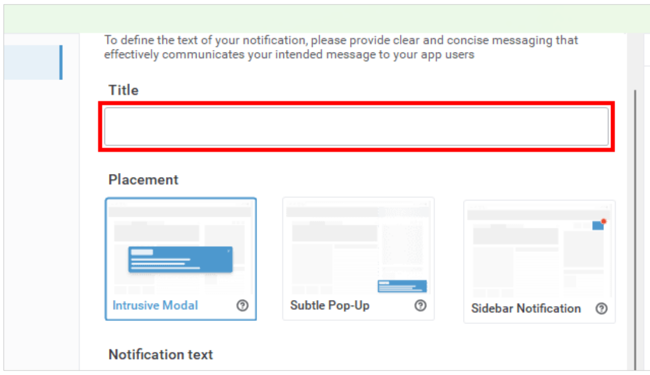


Click on the button **Select**.

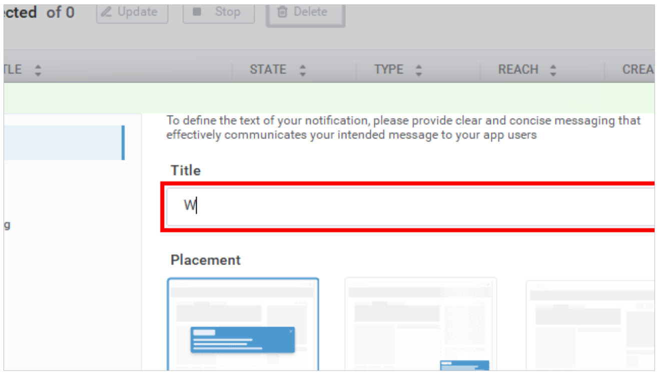


Click on the textbox **Title**.

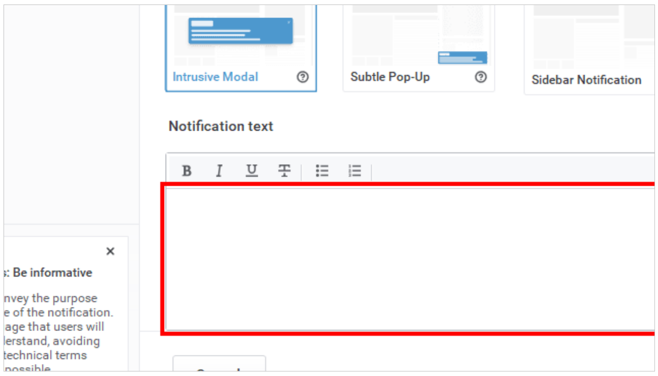
Here, you can provide the title name for the notification based on your project requirements.



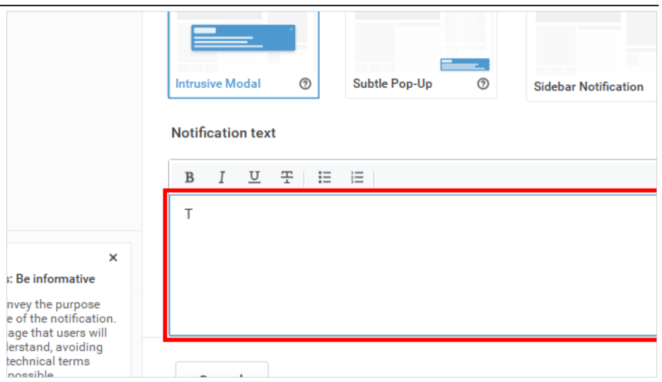
Enter **Title**.



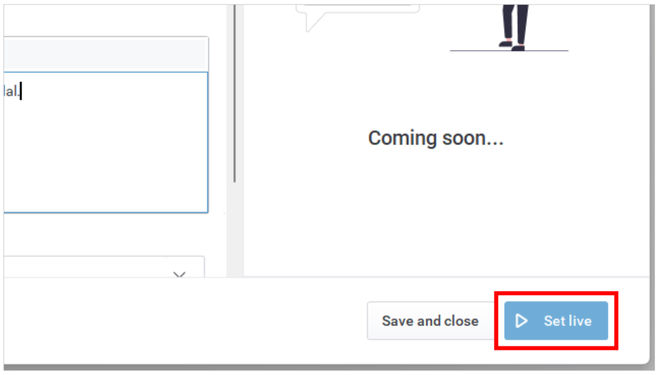
Click on the text editor **Content.**



Enter **Content**.

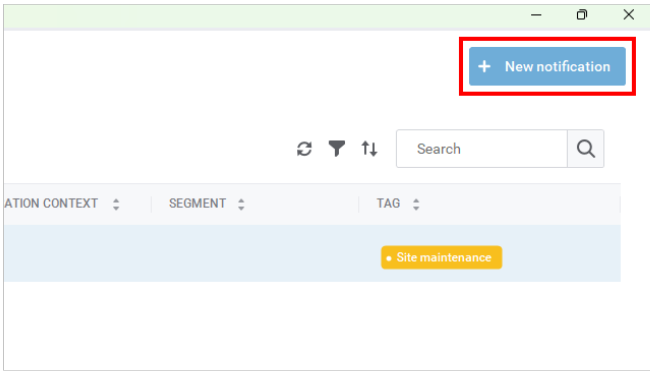


Click on the button **Set live**.

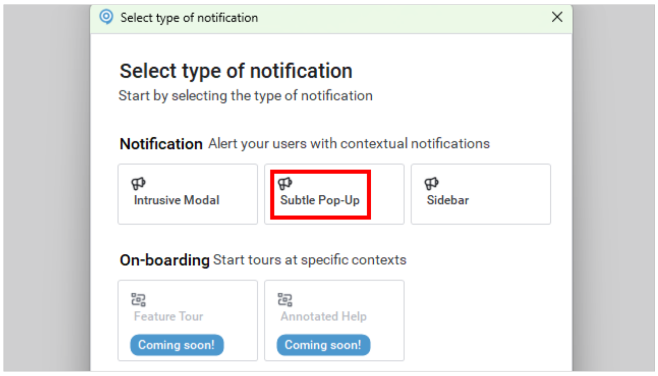


10.11.1.2. Subtle Pop-Up

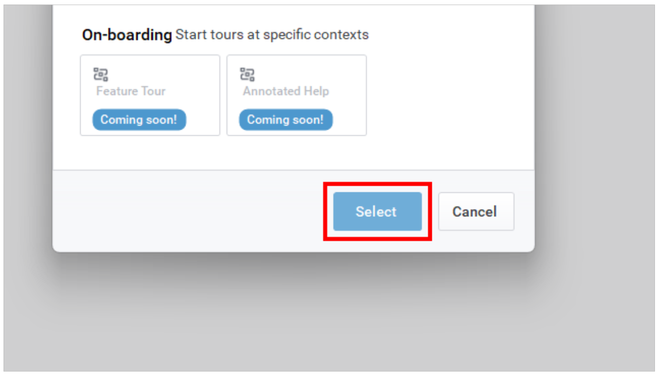
To create a subtle pop-up notification, click on the button **New notification**.



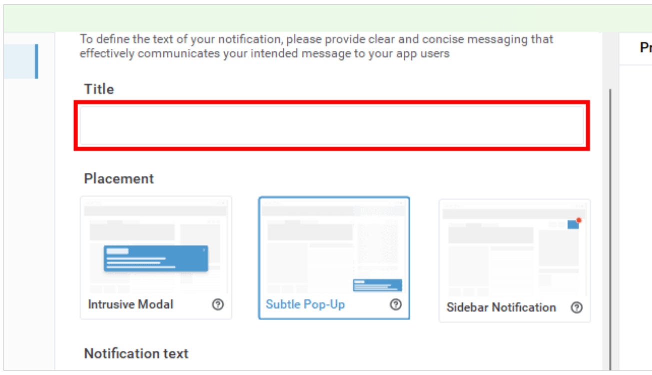
Click on the label **Subtle Pop-Up**.



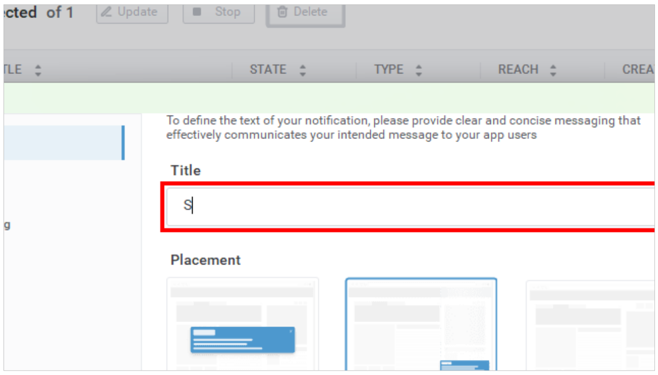
Click on the button **Select**.



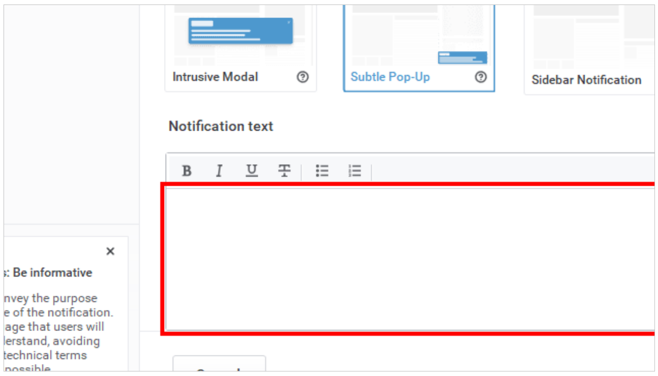
Click on the textbox **Title**.



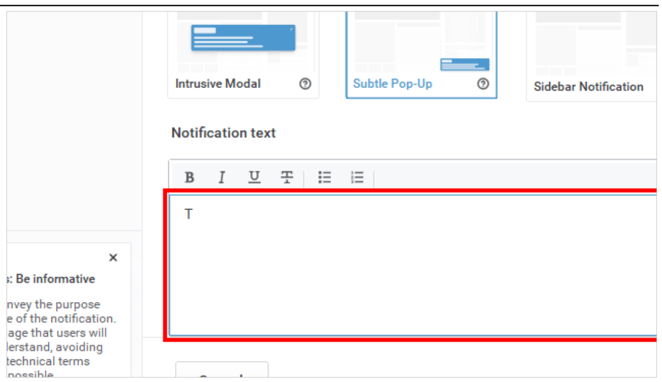
Enter **Title**.



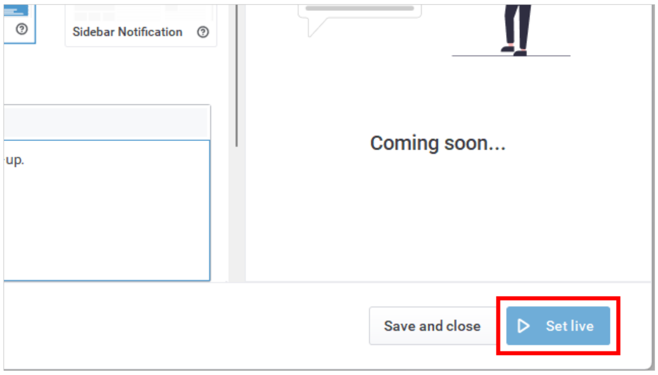
Click on the text editor **Content**.



Enter **Content**.

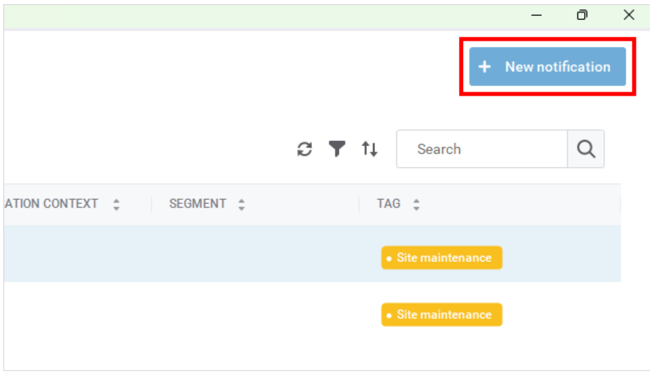


Click on the button **Set live**.

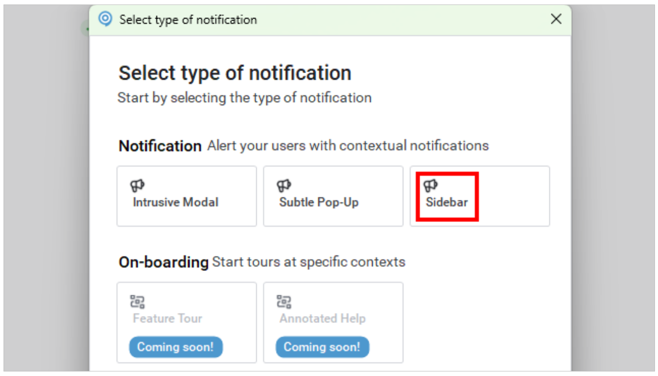


10.11.1.3. Sidebar

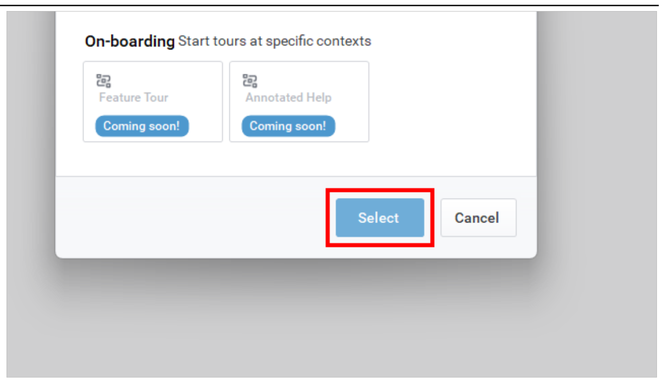
To create a sidebar notification, click on the button **New notification**.



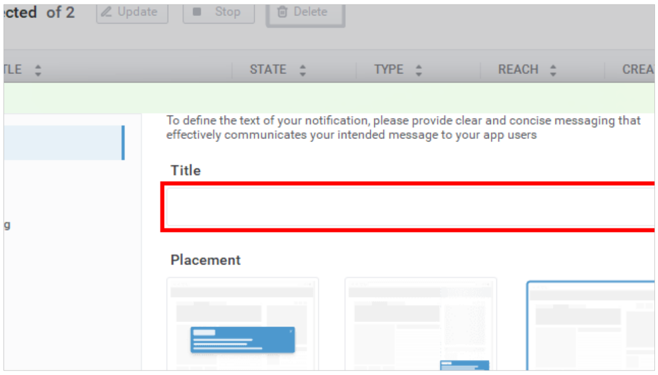
Click on the label **Sidebar**.



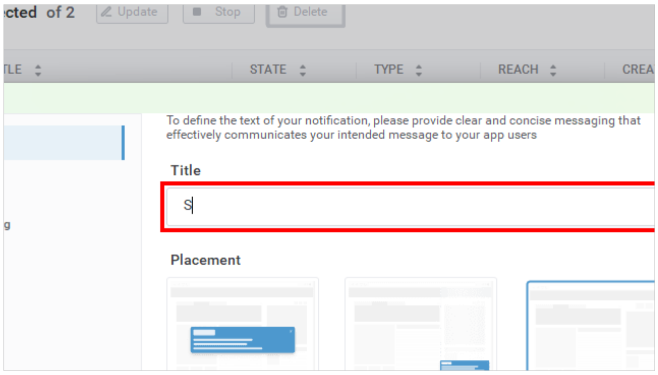
Click on the button **Select**.



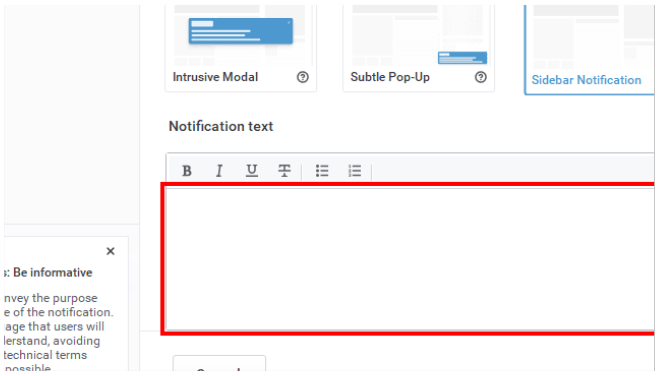
Click on the textbox **Title**.



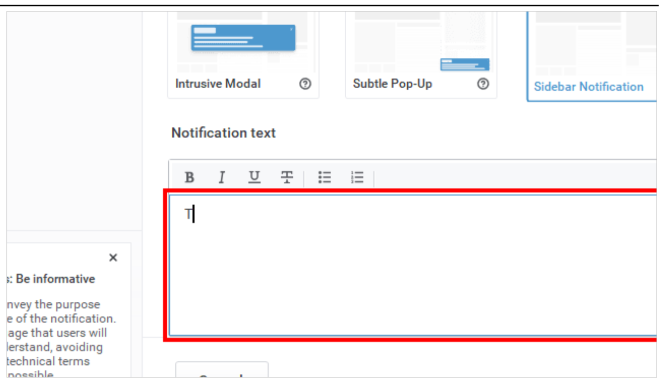
Enter **Title**.



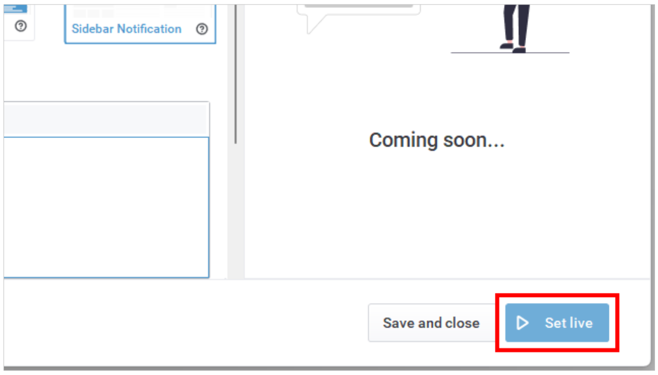
Click on the text editor **Content**.



Enter **Content**.

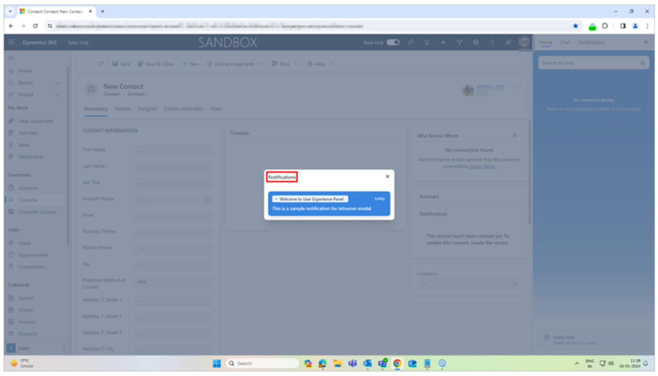


Click on the button **Set live**.



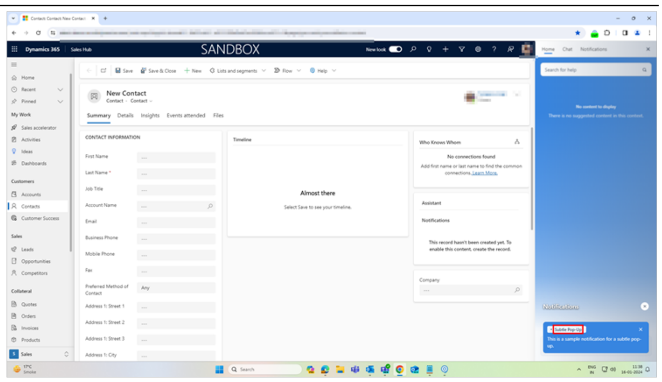
10.11.2. Preview Notifications

You can preview the notifications by launching the application that has the UXP set up. You must copy the published content URL from your project.

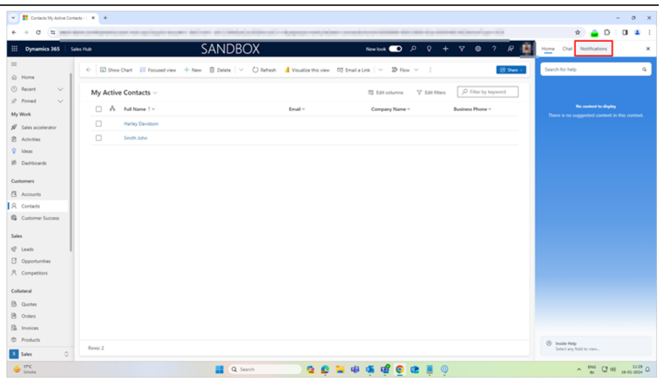


NOTE: Any changes done to the notifications do not require producing and publishing your project. The changes are portrayed directly on the UXP Panel.
Notifications: This is what the intrusive modal notification looks like.

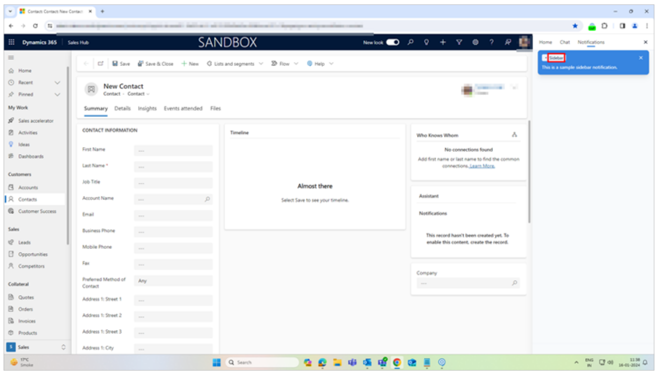
Subtle Pop-Up: This is what the subtle pop-up notification looks like.



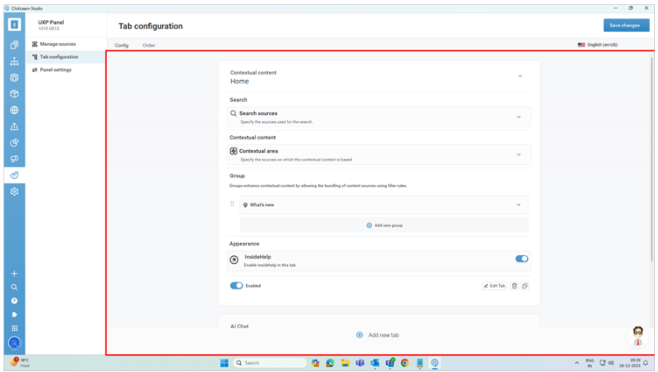
Click on the button **Notifications**.



Sidebar: This is what the sidebar notification looks like.



10.12. Best Practices



The following are the best practices when working with the User Experience Panel.
Configuration: One of the best practices is ensuring that the configuration you create is according to the output you expect.
(The configuration you create determines the output.)

Instructions: To effectively work with the AI chatbot, you should give clear and specific instructions.
Sources: You can check the documentation sources, which include PDF files and recordings, and modify them if needed.

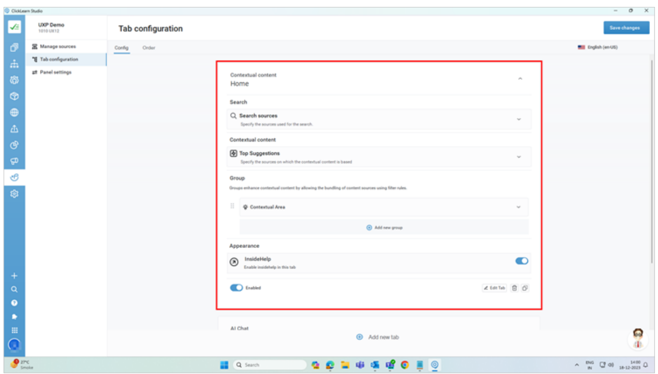
Browser: We recommend you restart your browser before using the User Experience Panel.

Structure and Segments: If you add a segment in structure and assign it to a recording, and in the UXP configuration, if you do not have it mapped, all the recordings assigned to that segment won't be displayed in the UXP.

ClickLearn Assist: To work with the UXP, you must enable ClickLearn Assist. You can verify its status in the publishing template in settings.

10.13. Limitations

10.13.1. Limitations of using the User Experience Panel are listed below.



Limitations of using the User Experience Panel are listed below.

- A subscription to the UXP panel is required.
- Switching between applications and modules may cause errors or inconsistencies. Avoid switching between applications and modules while recording.
- Modifying the UXP project requires producing and publishing your project once again. A browser restart is necessary to reflect the changes.
- The output depends on how accurately you configure the UXP.
- Wait for the next popup to appear. The post-

publication process usually takes 10-15 minutes. The post-publication time also depends on the structure and size of the project.

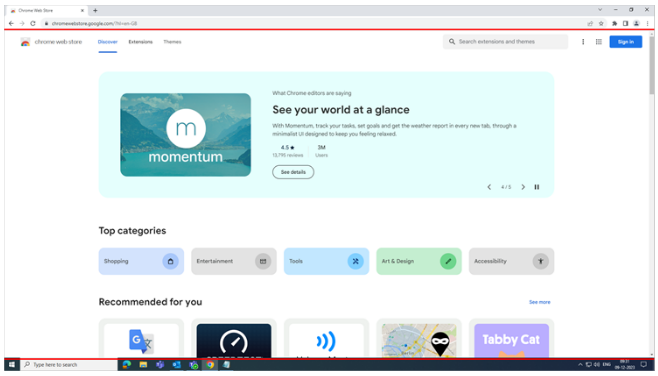
- The system does not update when you add a new role to the user. There are two ways in which you can see the changes that are reflected in the system. You can clear the browser cache, or you can also try to republish and reproduce your project.
- UXP is supported only in the EU and US regions.

10.14. Deploy and Configure UXP

10.14.1. Steps to install ClickLearn UXP Extension

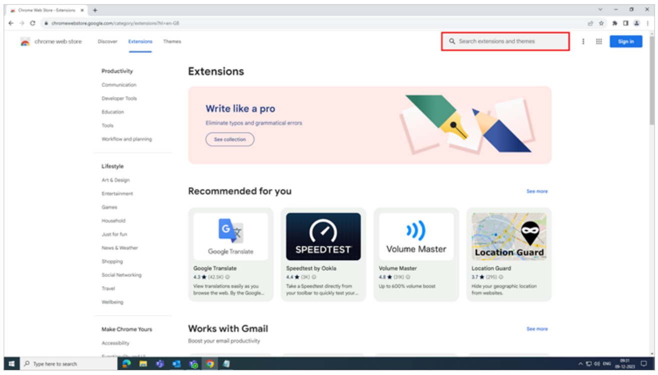
To install the ClickLearn UXP Chrome extension, follow the steps listed below.

- Launch Google Chrome or Microsoft Edge.
- Go to the Chrome web store or Microsoft Edge Add-ons.

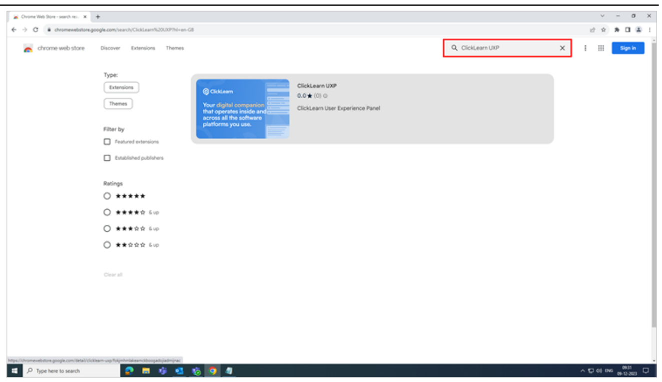


Following are the steps for the Google Chrome browser; you can follow the same steps for Microsoft Edge.

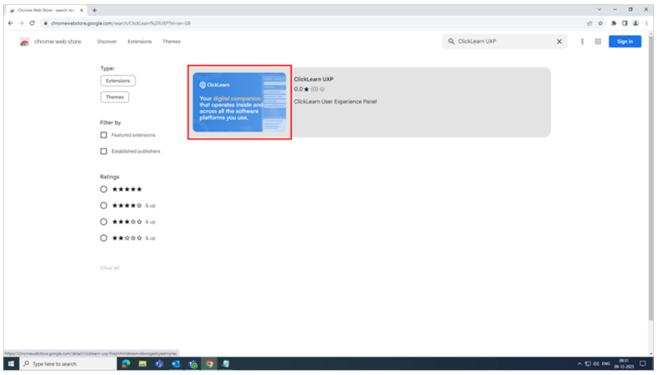
Click on the **search box**.



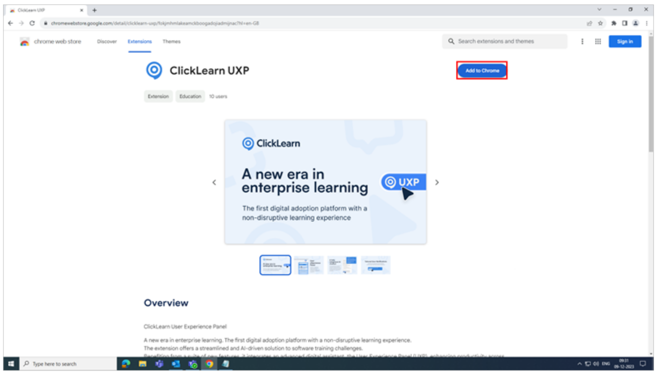
In the search box, type **ClickLearn UXP**.



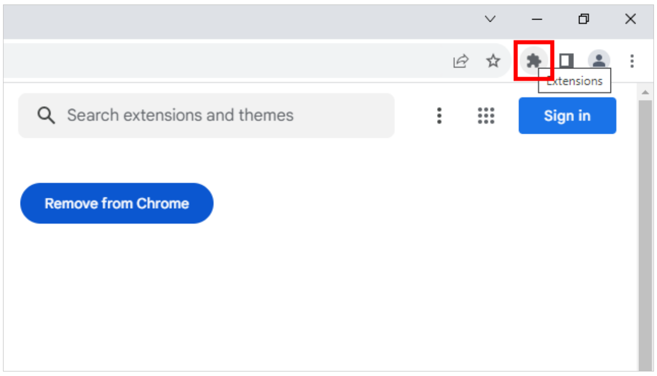
Click on the **UXP**.



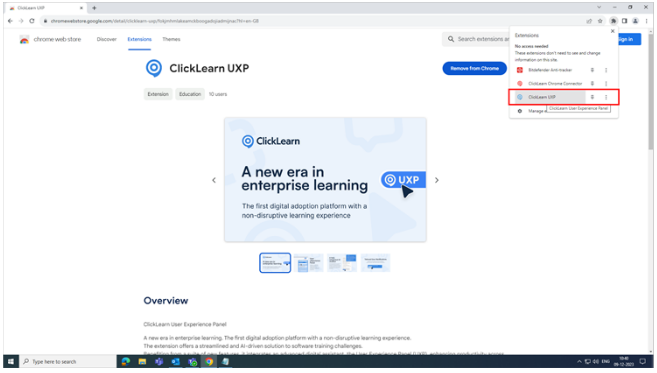
Click on the button **Add to Chrome**.



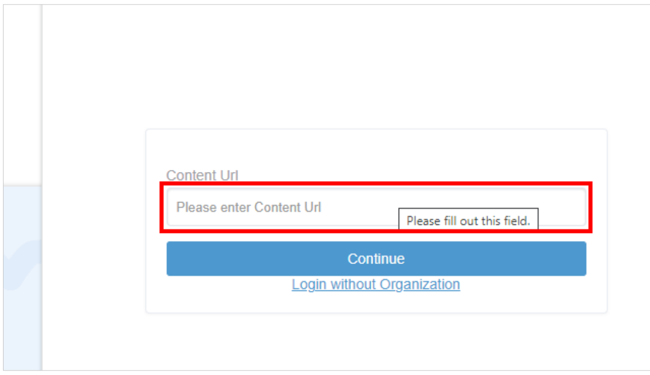
Click on **Extensions**.



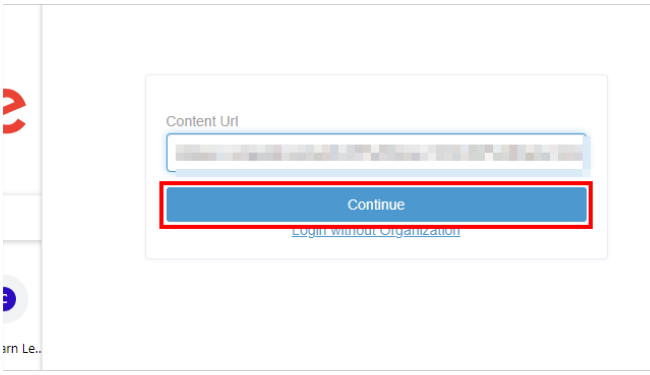
From the extensions, select **ClickLearn UXP**.



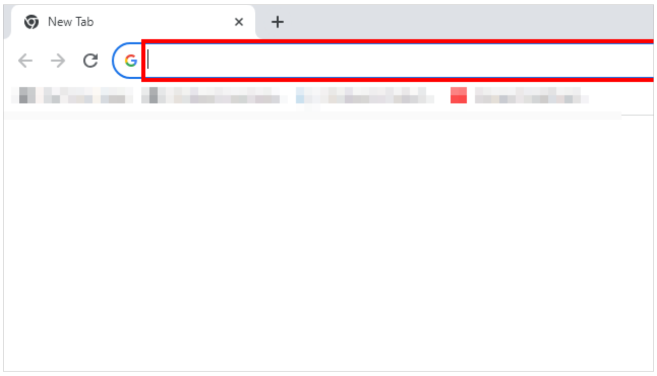
Click on the input field. **Please enter the content URL**.



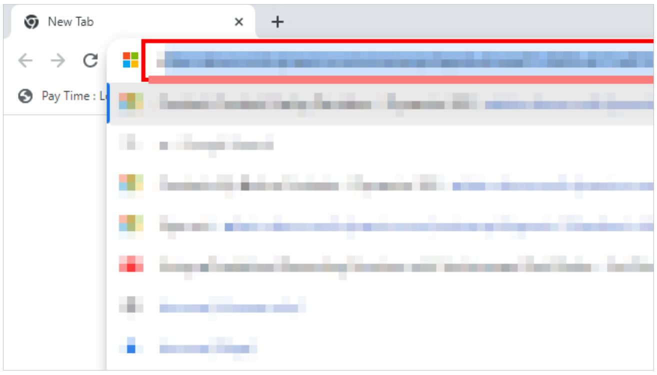
Here, you need to enter the content URL from the publication page. Copy and paste the content URL and click on the button **Continue**.



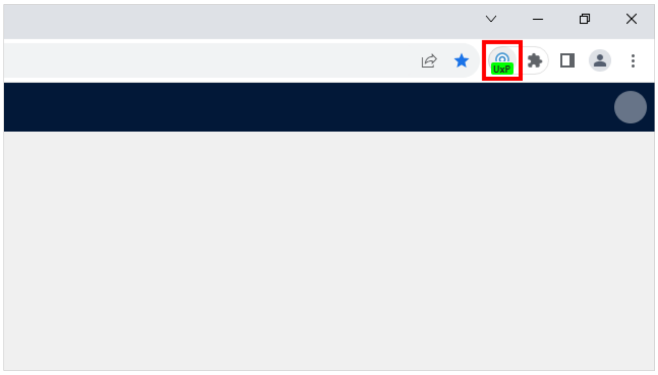
Click on the input field **Address and search bar**.



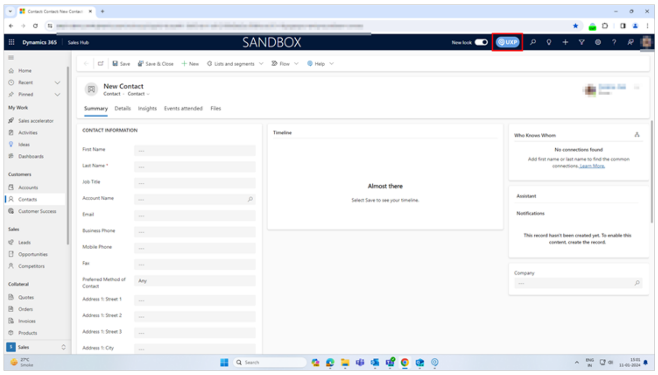
Enter the URL of the application.



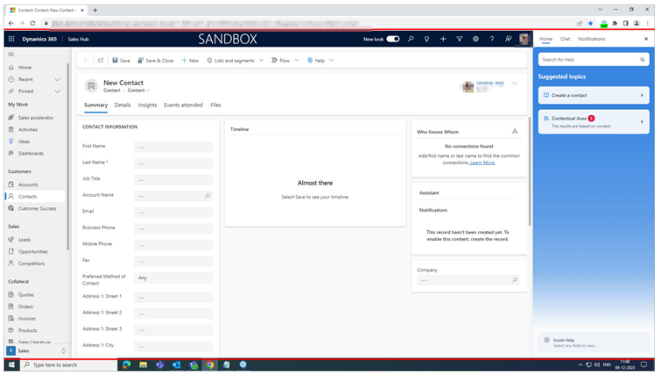
When you enter the application URL, the **UXP** icon changes to green.



Click on the group **UXP.**



The UXP appears next to the application.



10.15. Deploy and Configure UXP for all the end users(Contact local admin)

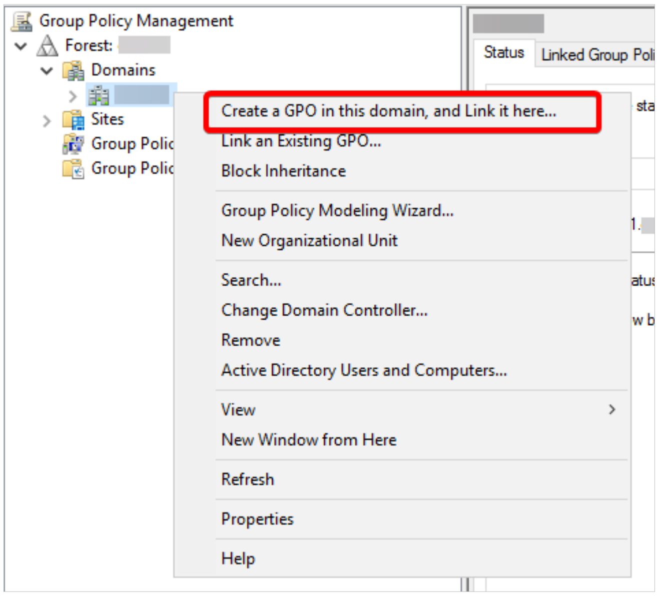
10.15.1. Steps for the mass installation of ClickLearn UXP Extension

Follow these steps to perform a bulk installation of ClickLearn UXP Extension.
Download the below batch file.

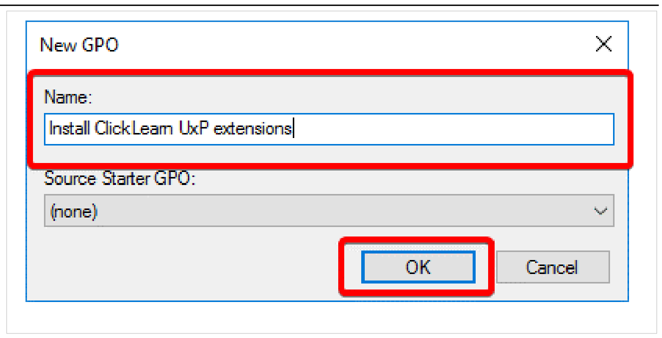
- ClickLearn UXP Extension

NOTE: You need to update the content URL manually. To update the content URL, select the batch file you downloaded, right-click on it, and open it in Notepad.
Find the URL, https://abc.com/publiccontent/pqr.htm, and replace it with your URL.

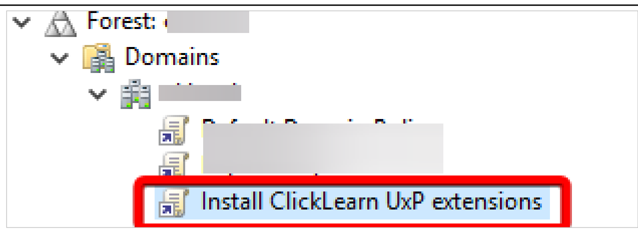
Go to the active directory server. Open the "**Group Policy Management**." Right-click on your domain directory. Click "**Create a GPO in this domain, and Link it here**."



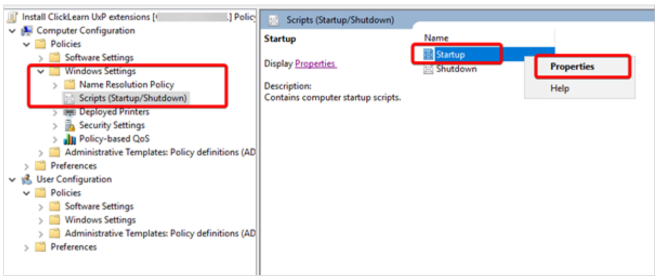
Later, a pop-up appears wherein you must fill in the value as per the given name, "**Install ClickLearn UxP extensions**." Click on the **OK** button.



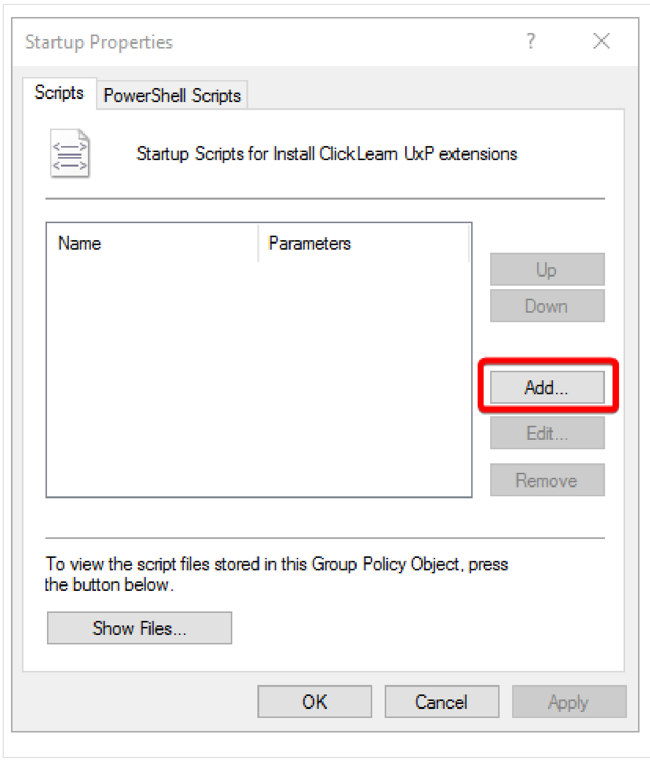
Once you click the OK button, the screen looks something like this.



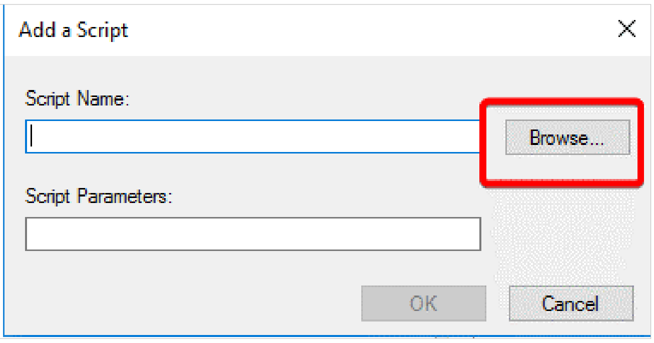
Expand Windows Settings, right-click on the policy, and click Edit. The screen looks something like this.



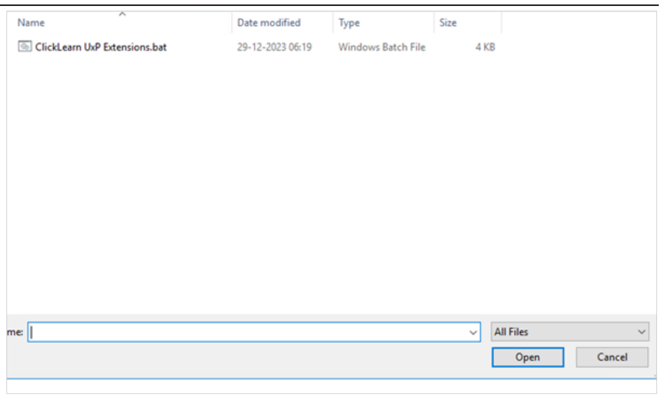
Click on the button **Add**.



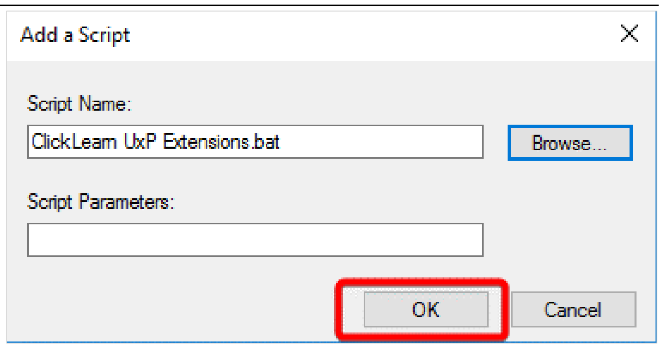
Click on the button **Browse**.



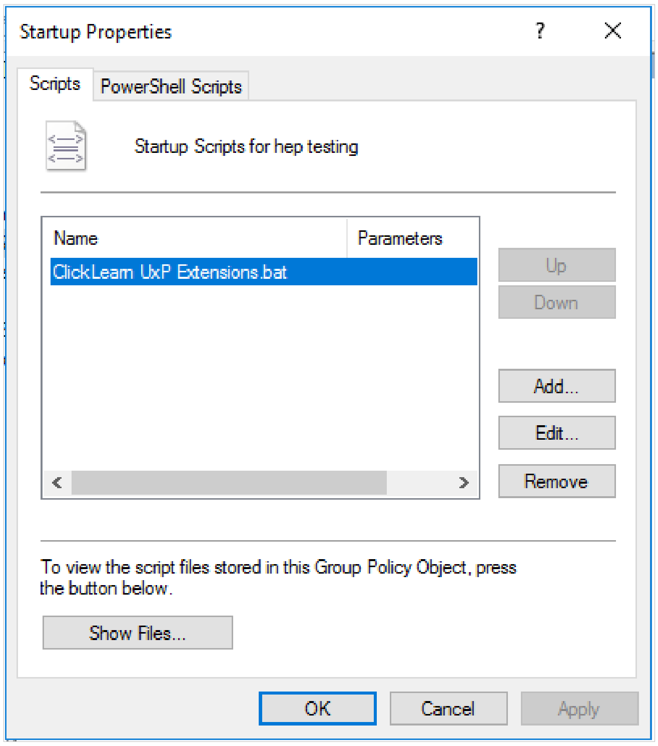
Copy the file you downloaded in the first step and paste it into the folder you opened from the browse option. Choose the file and open it.



Click on the button **OK**.



Click on the button **OK**.



Open the command prompt as an administrator and enter "**gpupdate /force**."
After completing the above steps, you can automatically apply this policy to every domain system.

11. Folder permissions in portal

Permissions can be set on each folder in portal for restricting access. Below is the definition of each permission.

Add : Add or Create anything in the folder for which permission is given.

Author : Add + Edit + Delete + Read

Delete :Delete anything in folder

Edit : Folder rename kind of editing/ also can edit recording in that folder.

Full Control : Master role which includes setting permissions to that folder and Add+Edit+Delete+Read

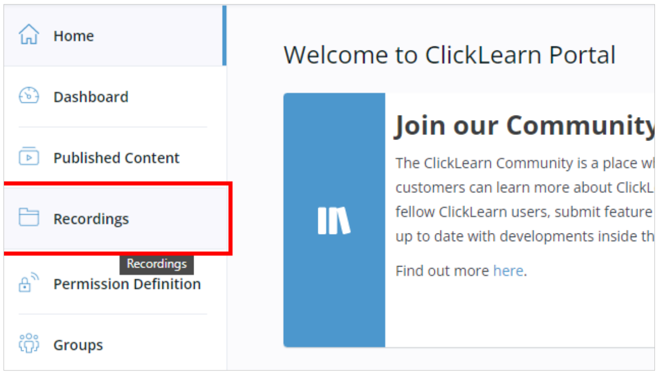
Reader : Only read the folder and files.

Please note that the permissions set will be overwritten by the root folder permission if it has less access.

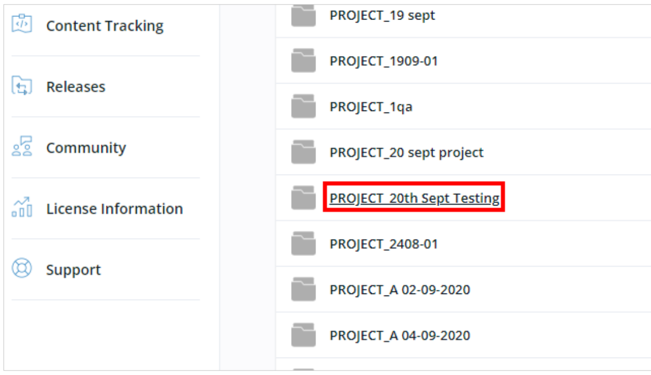
For example:
-A user having Author access[Add + Edit + Delete + Read
] on Assets folder and no delete access on its sub folder, user still can delete the sub folder and its contents, as it inherits the parent folder access.

11.1.Eg. How to assign permissions on recordings folder

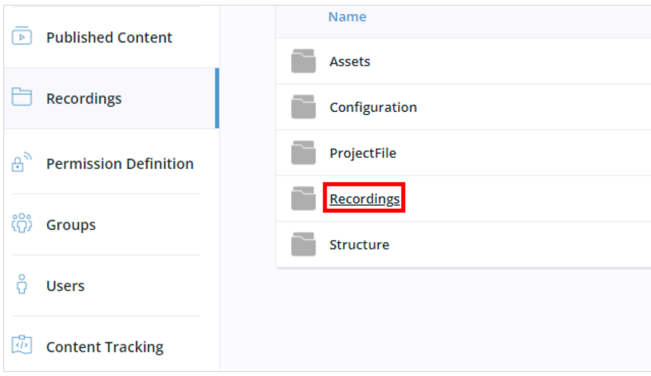
Click on the link **Recordings**



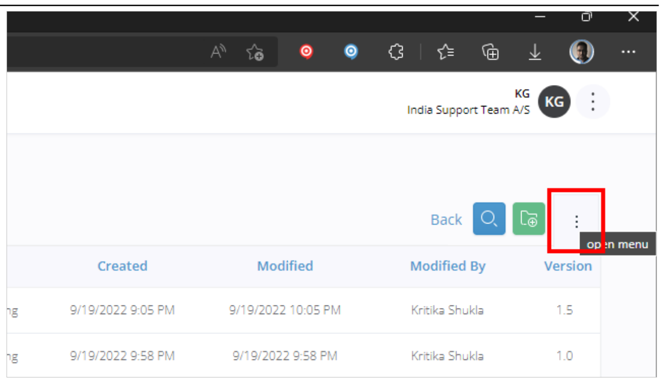
Click on the link **PROJECT_20th Sept Testing**

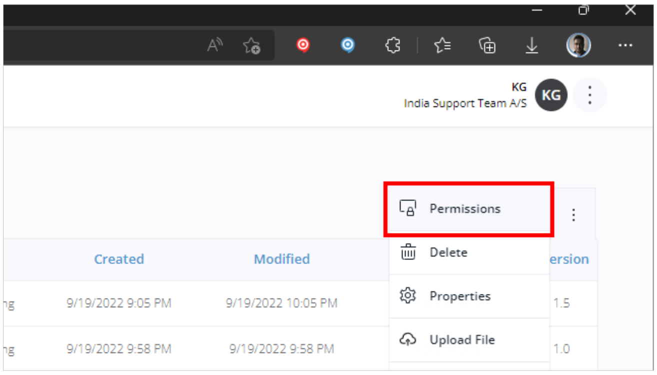
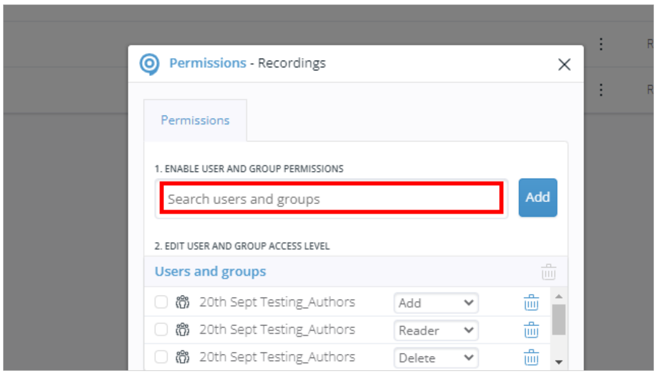
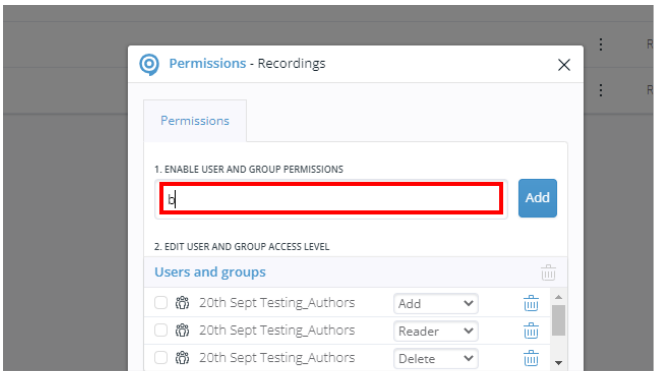
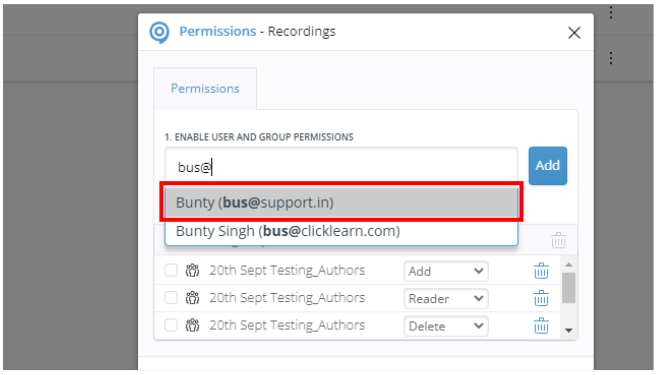


Click on the link **Recordings**

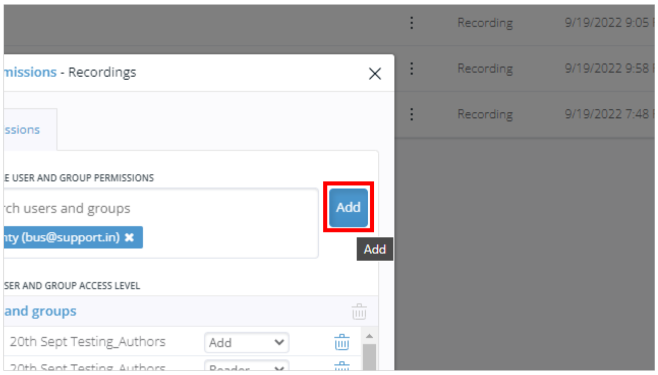


Click on the link **open menu**

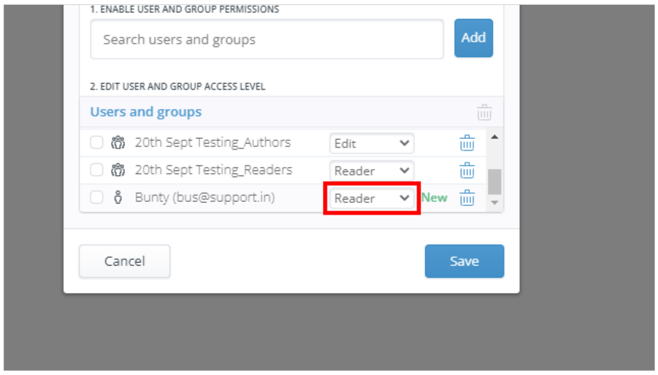


Click on the link **Permissions**	
Click on the input field **Search users and groups**	
Enter **Search users and groups**.	
Click on the item **Bunty (bus@ support.in)** in the list	

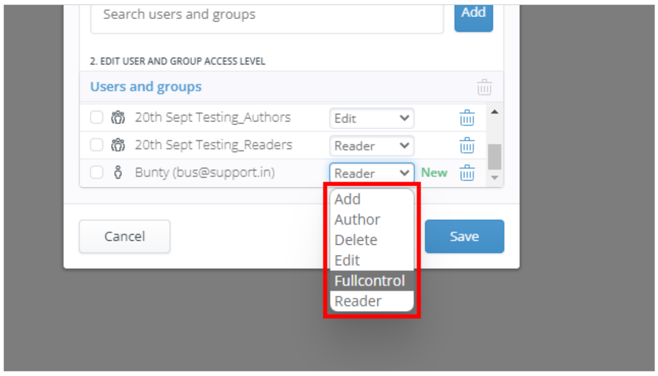
Click on the link **Add**



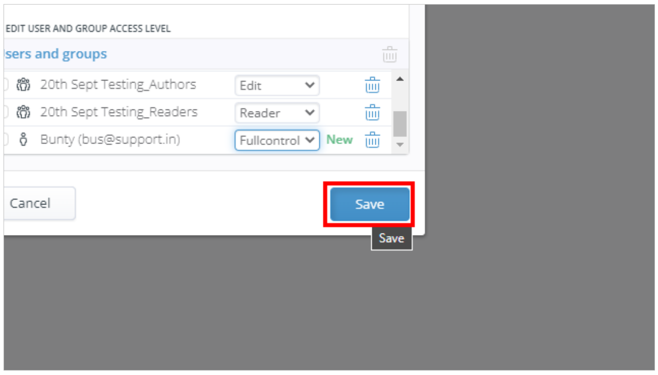
Click on the combo box



Click on an option from the list



Click on the link **Save**



12. Generic Web Connector

12.1. Generic web connectors

12.1.1. Introduction

In a web application, the html document describes the elements the user can interact with. Over time, the web application will change, stylesheets will be modified, elements will be rearranged, and labels may be changed. In many applications, grids of data are used, and the data is very important for a process to work, also when it

comes to updating the documentation or automating test scenarios.
Most applications do not ensure that elements are kept in the same order, nor do they ensure that elements are uniquely identified.

This document describes how to ensure that the web application can easily be recorded and replayed. It also ensures that the web application is properly prepared for on-screen guidance and automated process testing. Because web applications are very different and build with different backend frameworks, we provide a simple generic html document to describe from start to end, how it should be modified to conform to the generic web connector in ClickLearn.

12.1.2. Generic Web Page

There are several issues with the generic web page. The label for the input fields is not linked to the actual input elements. The options within the select element only holds the text and not the value attribute. The table does not in any way describe the technical parts, like column names and row keys, which means that if the grid was sortable or in another language, a replay would be impossible.

```
<html>
    <body>
        <h1>Generic</h1>
        First name:
        <input name="fname" type="text" value="John" /><br />
        Last name:
        <input name="lname" type="text" value="Doe" /><br />
        Gender:
        <select name="gender">
            <option>Female</option>
            <option selected="selected">Male</option>
        </select><br />
        Data:
        <table border="1">
            <thead>
                <tr>
                    <th>#</th>
                    <th>Gender</th>
                    <th>Count</th>
                </tr>
            </thead>
            <tbody>
                <tr>
                    <td>1</td>
                    <td>Female</td>
                    <td>1000</td>
                </tr>
                <tr>
                    <td>2</td>
                    <td>Male</td>
                    <td>500</td>
                </tr>
            </tbody>
        </table><br />
        <input name="bok" type="button" value="Ok" />
    </body>
</html>
```

12.1.3. Generic Web Page Replay Issues

To illustrate how changes will affect the replay, please have a look at the changed html document.

```html
<html>
    <body>
        <div>
            <h1>Generic Replay Issues</h1>
        </div>
        Last name:
        <input name="lname" type="text" value="Doe" /><br />
        First name:
        <input name="fname" type="text" value="John" /><br />
        Gender:
        <select name="gender">
            <option>Female</option>
            <option selected="selected">Male</option>
        </select><br />
        Data:
        <table border="1">
            <thead>
                <tr>
                    <th>#</th>
                    <th>Gender</th>
                    <th>Count</th>
                </tr>
            </thead>
            <tbody>
                <tr>
                    <td>2</td>
                    <td>Male</td>
                    <td>500</td>
                </tr>
                <tr>
                    <td>1</td>
                    <td>Female</td>
                    <td>1000</td>
                </tr>
            </tbody>
        </table><br />
        <input name="bok" type="button" value="Ok" />
    </body>
</html>
```

First change done is to move the H1 element into a new DIV element. This will cause the replay to fail, because the path to the element is no longer HTML/BODY/H1 but HTML/BODY/DIV/H1. Later, the properly changed html document with a data-clid on the H1 element will not fail when replaying, because it does not matter to the replay where in the document the data-clid is located.

Second change is the re-order of first and last name. This will not cause the replay to fail, but on both fields it will click into the wrong field. This is because it was recorded first by clicking into the first name and then into the last name. Because of the re-order the replay will now click into the last name and the into first name.

Third issue is on the grid data. Here the order has also been changed, causing the replay to click into the rows as ordered and not according to the actual data. The sample provided in the modified html document works due to the use of the attributes data-clid and data-clrowid.

12.1.4. Modified Web Page

Modifying the html document will make sure to get the proper text on fields when recording, have the correct unique identifiers for replay and the proper data knowledge on grids.

```html
<html>
    <body>
        <h1 data-clid="lblHeader">Modified</h1>
        <label for="fname">First name:</label>
        <input id="fname" type="text" value="John" data-clid="fldFirstName" /><br />
        <input id="lname" type="text" value="Doe" data-clid="fldLastName" data-
cltxt="Last name" /><br />
        <label for="gender">Gender:</label>
        <select id="gender" data-clid="fldGender">
            <option value="f">Female</option>
            <option value="m" selected="selected">Male</option>
        </select><br />
        Data:
        <table border="1" data-clid="gridData">
            <thead>
                <tr>
                    <th data-clid="colNumber" data-cltxt="Number">#</th>
                    <th data-clid="colGender">Gender</th>
                    <th data-clid="colCount">Count</th>
                </tr>
            </thead>
            <tbody>
                <tr data-clrowid="row-f">
                    <td>1</td>
                    <td>Female</td>
                    <td>1000</td>
                </tr>
                <tr data-clrowid="row-m">
                    <td>2</td>
                    <td>Male</td>
                    <td>500</td>
                </tr>
            </tbody>
        </table><br />
        <input name="bok" type="button" value="Ok" data-clid="btnOk" data-cltxt="Okay"
/>
    </body>
</html>
```

12.1.5. Attribute data-clid

Even though a html document encourages to set a unique id on elements using id="uniqueid", many developers do not. This causes an issue when replay needs to find an element. For the generic connector to work properly, please add the attribute data-clid and use a unique value for the element. For example, the input field for first name can become unique using the data-clid="fldFirstName". Once the attribute is in place, it does not matter to the replay where in the document the field is located, which means that the entire structure and order of elements may be changed - the replay will still find the element according to the given data-clid.

12.1.6. Attribute data-cltxt

Within the html document it is possible to label an element using the < label for=”uniqueid” >First name< /label >, which will describe the element with the same id. This is also supported by the generic connector and will ensure a proper text as documentation for the step, e.g. Click on the field First name.

Another way to set the proper text is to use the attribute aria-labelledby or aria-label.

If this approach cannot be used, the attribute data-cltxt can be used. This will be used by the connector to know which label the element has.

Remember, if the html document works for multiple languages, the backend must set the language specific text in this attribute.

12.1.7. Grids of data

The generic connector understands grid of data when using the table element, and the element TABLE and each TH must have attribute called data-clid. The element TR must have attribute data-clrowid. Each TH element is used to find the proper label for a column, and the inner text of the element is used. Optionally, add the data-cltxt to the TH element to provide another label for the column.

12.1.8. Grids of data using a custom approach

If the web application does NOT use the TABLE, TH, TR, TD approach it is important that you reply on using the attributes data-clgridid, data-clrowid and data-clid. It doesn’t really matter if the html document uses DIV’s or SPAN’s or other element tags, but it is important that the right attributes are used for ClickLearn to understand the rows and columns of a grid.

The sample CustomGrid.html shows the modifications required for the web application to become ClickLearn compliant.

```html
<html>
    <body>
        <h1 data-clid="lblHeader">CustomGrid</h1>
        Custom Sample Grid:
        <div>
            <div>
                <span style="display:inline-block;width:10%;">#</span>
                <span style="display:inline-block;width:50%;">Gender</span>
                <span style="display:inline-block;width:35%;">Count</span>
            </div>
            <div>
                <div style="border:solid 1px gray;">
                    <span style="display:inline-block;width:10%;">1</span>
                    <span style="display:inline-block;width:50%;">Female</span>
                    <span style="display:inline-block;width:35%;">1000</span>
                </div>
                <div style="border:solid 1px gray;">
                    <span style="display:inline-block;width:10%;">2</span>
                    <span style="display:inline-block;width:50%;">Male</span>
                    <span style="display:inline-block;width:35%;">500</span>
                </div>
            </div>
        </div><br />
        ClickLearn Enabled Grid:
        <div data-clgridid="gridData_custom">
            <div>
                <span style="display:inline-block;width:10%;" data-clid="colNumber"
data-cltxt="Number">#</span>
                <span style="display:inline-block;width:50%;" data-
clid="colGender">Gender</span>
                <span style="display:inline-block;width:35%;" data-
clid="colCount">Count</span>
            </div>
            <div>
                <div style="border:solid 1px gray;" data-clrowid="row-f">
                    <span style="display:inline-block;width:10%;">1</span>
                    <span style="display:inline-block;width:50%;">Female</span>
                    <span style="display:inline-block;width:35%;">1000</span>
                </div>
                <div style="border:solid 1px gray;" data-clrowid="row-m">
                    <span style="display:inline-block;width:10%;">2</span>
                    <span style="display:inline-block;width:50%;">Male</span>
                    <span style="display:inline-block;width:35%;">500</span>
                </div>
            </div>
        </div><br />
    </body>
</html>
```

12.1.9. Attribute data-clrowid

Each TR element represents a row within the grid. A row id must be provided using the attribute data-clrowid. Typically, the value is a unique row key value. How the replay finds the correct row may be edited in the Data Editor role.

12.1.10. Controlling data on OPTION elements

When describing a list of options please use the value attribute. This way an option may hold the text “Male” but the value “m” as an example. Controlling the value like this ensures that the text may be changed according to language without changing the value itself. A replay will work properly for multiple languages.

12.1.11. Annotated screenshot

The generic connector will collect A, BUTTON and INPUT elements.
On top of these elements, all elements using the attribute data-clid will be included.

12.1.12. Modified Replay Still Ok

Even though the html document is changed the replay works correctly.

```html
<html>
    <body>
        <div>
            <h1 data-clid="lblHeader">Modified Replay Still Ok</h1>
        </div>
        Last name:
        <input id="lname" type="text" value="Doe" data-clid="fldLastName" data-
cltxt="Last name" /><br />
        <label for="fname">First name:</label>
        <input id="fname" type="text" value="John" data-clid="fldFirstName" /><br />
        <label for="gender">Gender:</label>
        <select id="gender" data-clid="fldGender">
            <option value="f">Female</option>
            <option value="m" selected="selected">Male</option>
        </select><br />
        Data:
        <table border="1" data-clid="gridData">
            <thead>
                <tr>
                    <th data-clid="colNumber" data-cltxt="Number">#</th>
                    <th data-clid="colGender">Gender</th>
                    <th data-clid="colCount">Count</th>
                </tr>
            </thead>
            <tbody>
                <tr data-clrowid="row-m">
                    <td>2</td>
                    <td>Male</td>
                    <td>500</td>
                </tr>
                <tr data-clrowid="row-f">
                    <td>1</td>
                    <td>Female</td>
                    <td>1000</td>
                </tr>
            </tbody>
        </table><br />
        <input name="bok" type="button" value="Ok" data-clid="btnOk" data-cltxt="Okay"
/>
    </body>
</html>
```

12.1.13. ClickLearn Assist with browser extension

In order to use ClickLearn Assist please use the extension “ClickLearn Assist” in the browser. Find it in the browser store and install it. Then use the Assist Configuration from the published project.

12.1.14. ClickLearn Assist without browser extension

To avoid using the web browser it is required to include the published Project.assist.js on all pages in the web application.

For example, add the following to the web application page.

```html
<html>
    <head>
        <script src="Project.assist.js"></script>
    </head>
    <body>
        <h1>Sample page with ClickLearn Assist embedded</h1>
    </body>
</html>
```

It is important that all pages, including IFRAME pages include the script.