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1. What is ClickLearn Attain

1.1. ClickLearn Attain: On Overview

Understand ClickLearn Attain, before installing it.

1.1.1. What is ClickLearn Attain

ClickLearn Attain is a platform for creating, managing, and sharing training materials and documentation. Install ClickLearn Studio on your Windows machine, record any process inside any application, and ClickLearn Attain automatically generates step-by-step guides, videos, and other training materials - all from a single recording.

Your content works across:

- 7 output formats, including Word files, PDFs, videos, and interactive simulations
- 45+ languages
- All major platforms - browsers, Windows applications, Excel, ERPs, and CRMs

Who This Is For

Role	How ClickLearn Attain helps
Authors	Record a process once and let ClickLearn Attain generate all your training materials automatically.
Team leads and managers	Keep your team aligned with consistent, up-to-date documentation.
IT administrators	Deploy a full learning portal across your organisation with minimal setup.
End users	Get step-by-step guidance right inside the applications you use every day.

1.1.2. What You Can Do With ClickLearn Attain

Digital Adoption

Help your team navigate new systems with in-app, step-by-step guidance available in multiple languages. ClickLearn Assist overlays guidance directly on top of the business system screen, so users never need to switch between the application and a separate training document.

Employee Training

Create training materials in multiple formats and languages so every team member stays up to date, regardless of location. One recording produces written guides, videos, interactive simulations, and LMS packages simultaneously.

Software Documentation

Capture processes across all your platforms and generate consistent, professional documentation automatically. When your business system changes, the Replay feature refreshes your recordings in minutes rather than requiring re-recording from scratch.

The Seven Output Formats
From one recording, ClickLearn Attain produces all of the following:

Format	What It Is	Best Used For
HTML Documentation	A web-based step-by-step guide with screenshots, published as a searchable learning portal.	Self-service reference, onboarding
Word Document (.docx)	A downloadable document version of the recording.	Process documentation, offline training
PDF	A static version of the written guide.	Distributing documentation without editing access
PowerPoint Presentation	Slides with screenshots and step labels.	Trainer-led sessions, process walkthroughs on screen
Show Me Video	An automated walkthrough video.	Introducing a process, asynchronous training
Try Me Video	An interactive simulation for hands-on practice.	Practice without live system access
Test Me Video	A scored simulation that tests process completion.	Assessment, compliance validation

1.1.3. What More

ClickLearn Assist

In addition to the seven formats above, ClickLearn Attain generates ClickLearn Assist, a step-by-step in-application guidance that overlays on top of the business system itself. Assist guides users through a process in real time, on the actual screen, without switching to a separate training document.

The Replay Advantage

When your business system is updated - a new release, a UI change, a field rename - ClickLearn Attain's Replay feature refreshes your existing recordings automatically. Rather than re-recording each process from scratch, Replay re-runs the original recording steps against the updated system and replaces outdated screenshots and data. What would take days of manual re-recording takes minutes.

ClickLearn has two major components: Studio and the Admin Portal

ClickLearn Studio: the desktop application where authors record processes, edit content, configure structure, and publish output.

The Admin Portal: a web-based management interface where administrators manage users, monitor content engagement, configure permissions, and access published content.

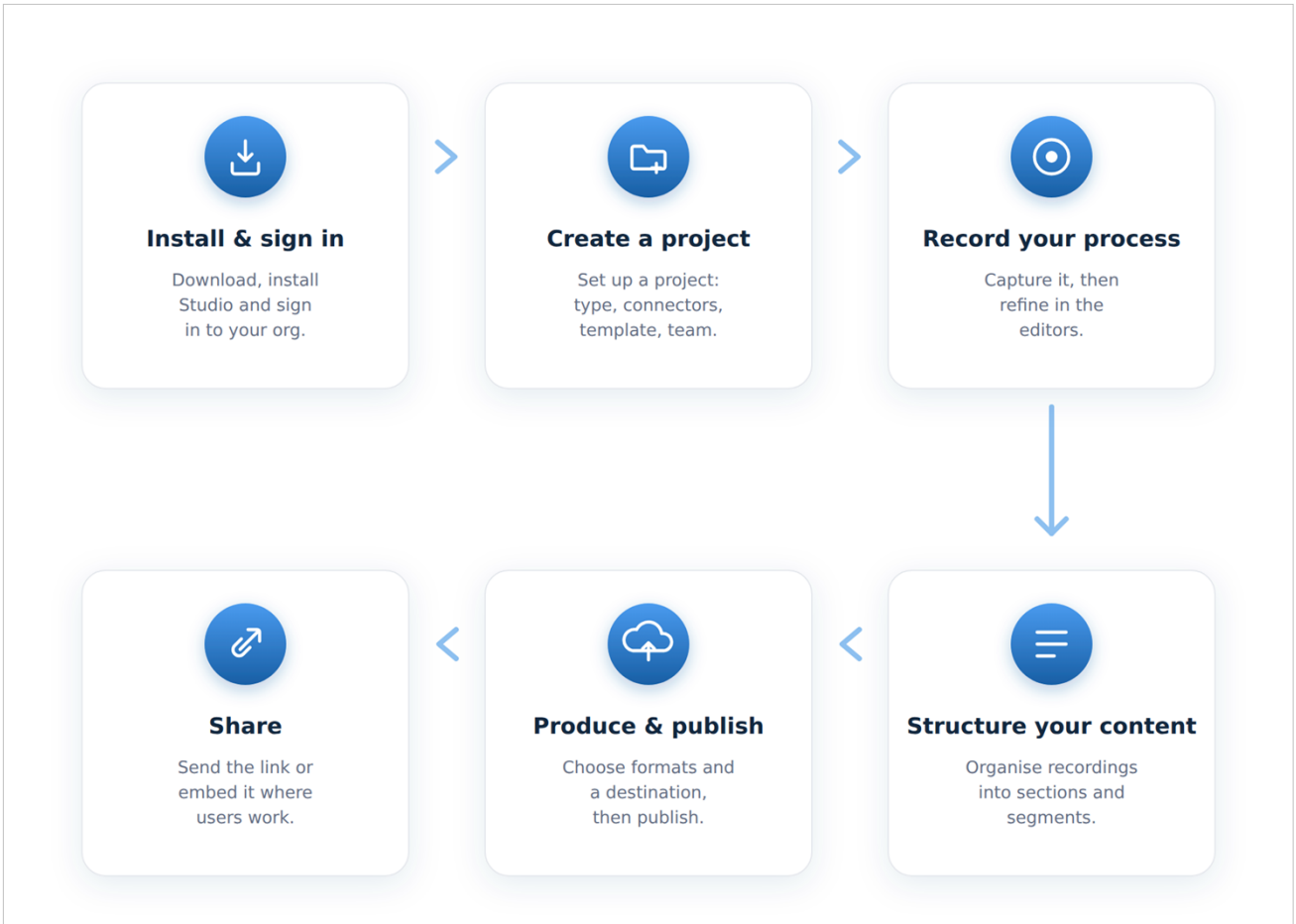
1.2. Quick Start: From Install to First Published Content

Understand the product, so your first interaction is purposeful.

1.2.1. From Install to First Published Content

You can go from installing ClickLearn Attain to a published guide with a shareable link in a single session. This page walks the whole path end to end. Each step links to a detailed article if you want more.

By the end, you'll have: ClickLearn Studio installed and signed in, one recorded process, and a published guide with a link you can send to anyone - no install required on their side.



Six phases you move through. Each one is an area of work with its own detailed articles - this is the map, not the full route. As you move ahead, you'll learn more about each of these.

1.3. Resources

1.3.1. Resource Library

Know where to go for help before you need it , so blockers are resolved quickly without raising a support ticket.

1.3.1.1. ClickLearn Resource Library - Stay Ahead with Expert Insights!

Looking to sharpen your skills, explore new features, or simply stay updated with everything ClickLearn?

You're in the right place.

ClickLearn Community: Connect, ask questions, and learn from fellow ClickLearn users.
- *Explore now* → ClickLearn Community

ClickLearn Universe: Your learning space filled with self-paced courses and tutorials.
- *Start learning* → ClickLearn Universe

Product Documentation: Step-by-step technical guidance to help you get the most out of ClickLearn.
- *Access docs* → Product Documentation

Morten's Corner: Insider thoughts, leadership lessons, and sharp takes from our Senior Support Consultant Morten.
- *Take a peek* → Morten's Corner

ClickLearn.com: Discover the latest solutions, features, and customer stories.
- *Visit* → ClickLearn Official Site

1.3.2. Ask Alfred

Ask Alfred brings context-aware help, AI answers, and direct support into one in-app panel, so users get unstuck without ever leaving their work.

1.3.2.1. What is Ask Alfred?

Ask Alfred is an in-app assitant built into ClickLearn Attain. It lets you learn in the moment of need, right in the flow of work, without leaving the application.

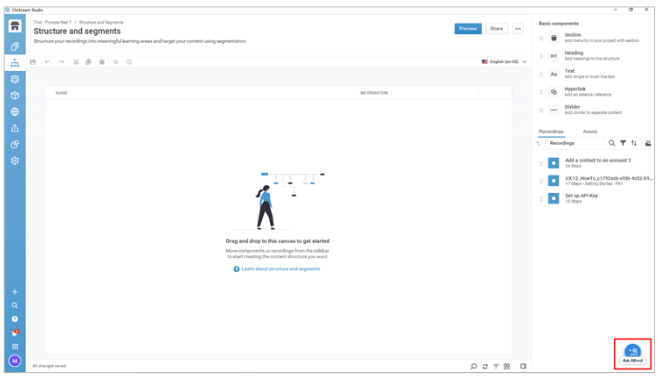
Today, getting help usually means stopping what you are doing, opening a separate learning portal, and searching for the answer. You lose your place and your momentum. Alfred removes that friction by bringing guides, help content, an AI assistant, and support into **one panel inside Attain**.

Ask Alfred is named after Batman's butler, the character who quietly does the heavy lifting. In the same way, Alfred carries the load so you can focus on getting your work done.

1.3.2.2. Opening Ask Alfred

Ask Alfred opens as a panel on the right side of the application, so the screen you are working on stays visible.

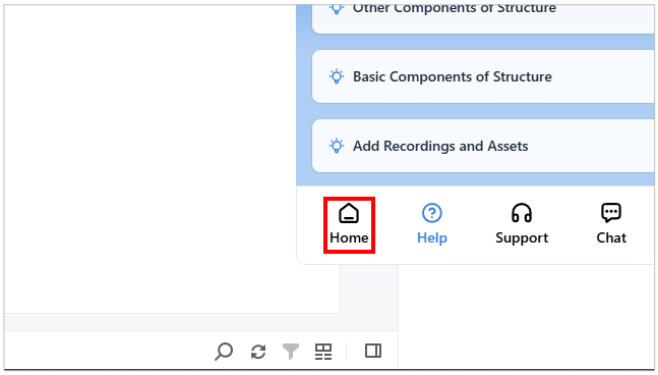
Select the **Ask Alfred** icon in bottom right corner.



1.3.2.2.1. Tabs in Ask Alfred

Ask Alfred is organized into five tabs along the bottom of the panel. Namely, **Home**, **Help**, **Support**, **Chat**, and **News** with each tab giving you a different way to get help without leaving your work

Select **Home** in the tab bar.



Home: The Home tab is your starting point. It brings help topics, your booked meetings, and your support cases together in one place.

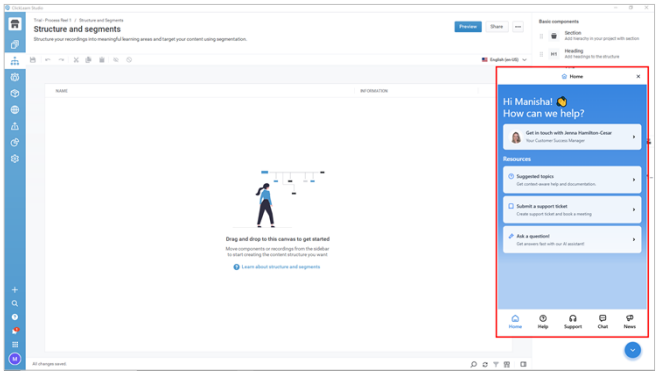
How can we help: A personal greeting that welcomes you by name and invites you to find the help you need.

Get in touch with your Customer Success Manager: A shortcut to contact your Customer Success Manager, shown by name and photo.

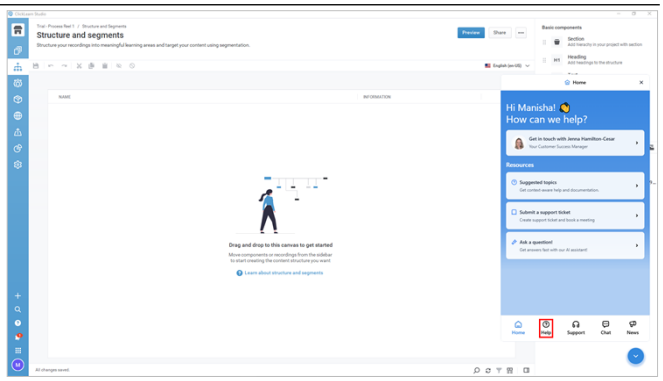
Suggested topics: A quick link to context-aware help and documentation.

Submit a support ticket: A quick link to create a support ticket and book a meeting.

Ask a question: A quick link to get answers fast from the AI assistant.



Select **Help** in the tab bar.

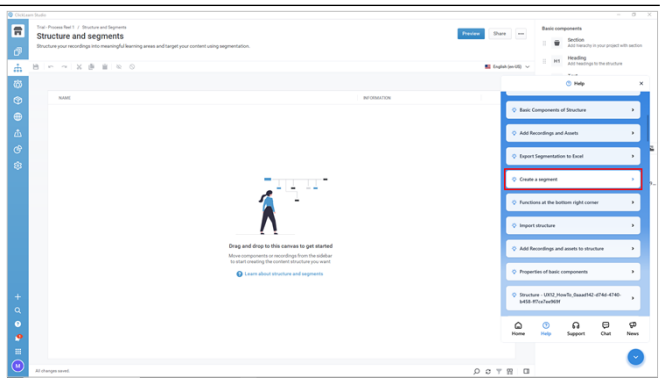


Help: The Help tab gives you context-aware help and documentation for the part of the application you are working in.

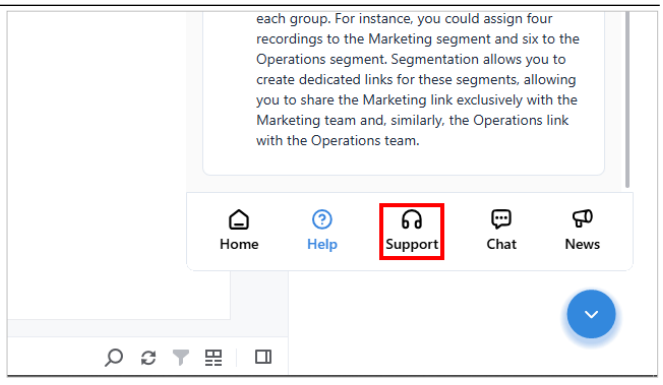
Suggested topics: Help topics suggested based on where you are in the application.

Search the Help Center: A search bar to find answers across the Help Center.

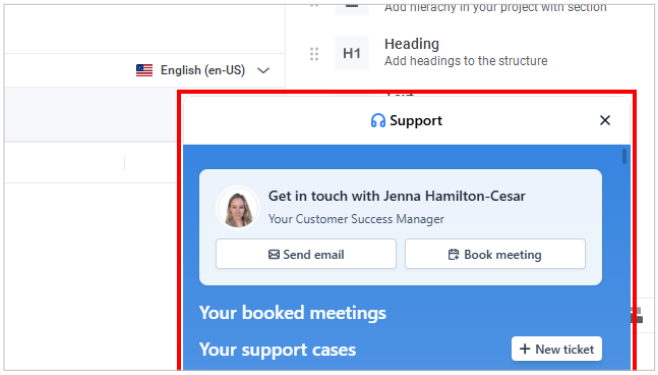
In-app walkthroughs: Guides you can follow step by step without leaving your work.



Select **Support** in the tab bar.



Support: The Support tab is where you reach out to ClickLearn for assistance.



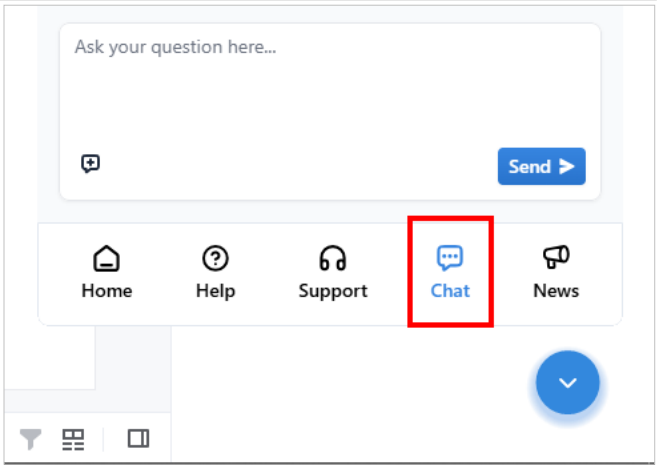
Contact Customer Success: Reach your Customer Success team directly via email or by booking a meeting.

Book a meeting: Schedule a meeting with the support team.

Raise a support ticket: Create a ticket and attach screenshots to explain the issue.

Ticket status: See the status of tickets you have raised and track each one through to a response.

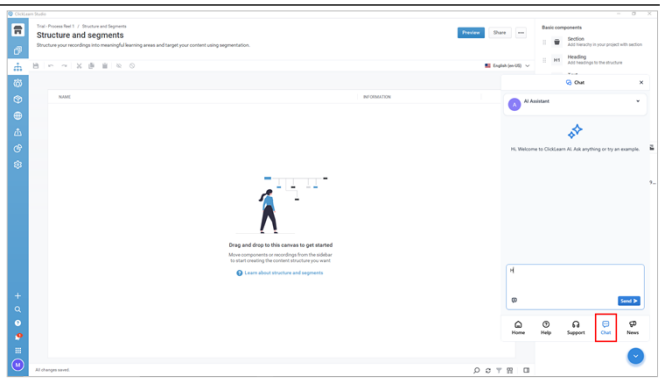
Select **Chat** in the tab bar.



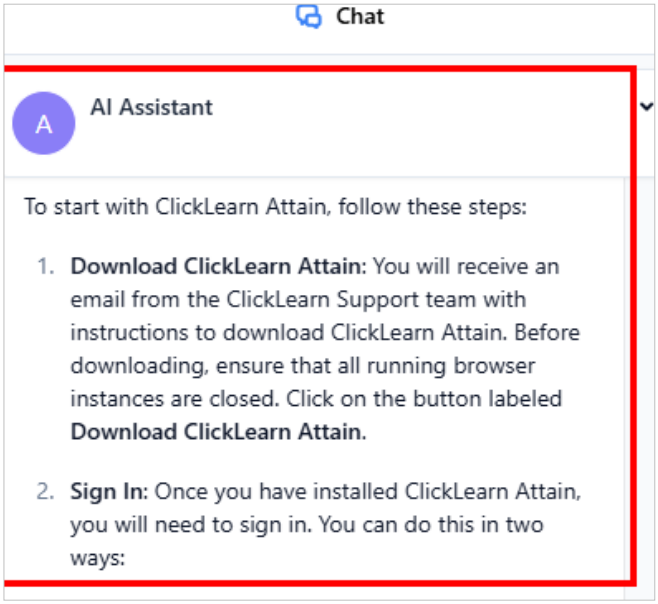
Chat: The Chat tab connects you with Alfred's AI assistant for fast answers.

Ask the AI assistant: A chat window where you type a question and get an answer straight away.

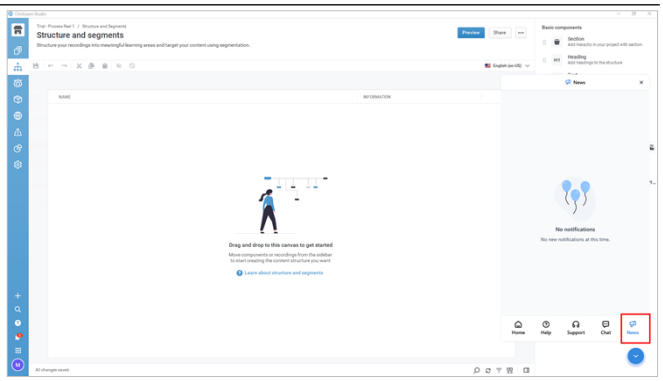
Click on the button **Send**.



Step-by-step assistance appears on the screen as the assistant walks you through a task and produce real output.

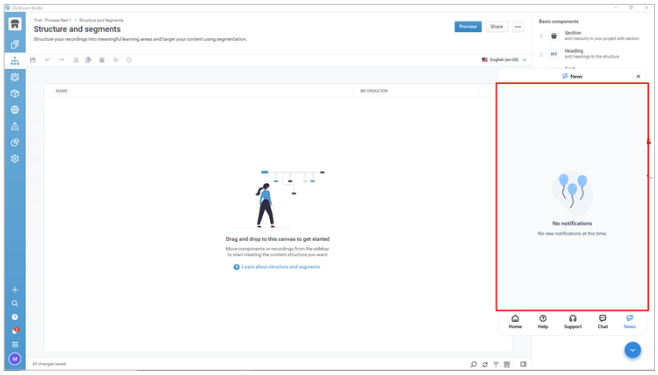


Select **News** in the tab bar.



News: The News tab keeps you up to date while you work.

Notifications: Updates and announcements from ClickLearn, delivered in the flow of work.



2. Before You Install

2.1. System Requirements

Confirm your system is compatible before downloading , so installation succeeds on the first attempt.

2.1.1. Operating system

- Windows 7 or later.
- PS: ClickLearn Attain does not work on Windows 8.0.

2.1.2. Dependent softwares

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

2.1.3. Hardware

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

2.1.4. RAM Requirement

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

2.1.5. 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.

2.1.5.1. 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

2.1.5.2. 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

2.1.5.3. 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

2.1.5.4. 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

2.2. Running ClickLearn Attain on Mac

Use ClickLearn on Mac with the right virtualisation setup.

2.2.1. Recommended VM Configuration

- **RAM allocated to VM:** minimum 4 GB, ideally 6 to 8 GB.
- **CPU cores allocated:** minimum 2 cores, ideally 4.
- **Disk space for VM:** 60 GB or more.
- **Display resolution inside VM:** set to 1920 x 1080 at 100% scale before recording.
- **Graphics acceleration:** enable in VM settings if available, it improves rendering speed.

2.2.2. Windows Licensing

You need a valid Windows licence to install Windows inside a VM. Options include a Windows 10 or 11 licence from Microsoft or a volume licensing agreement, or, for Apple Silicon Macs, Windows 11 ARM via the Microsoft Insider programme (no additional cost, requires a Microsoft account). Check with your IT department first, your organisation may already have available Windows licences that can be used in a VM.

2.2.3. Performance Tips

- Close non-essential Mac applications before recording in the VM, shared memory means Mac apps compete with the VM.
- Allocate at least half of your Mac's total RAM to the VM when recording.
- Use a wired network connection rather than Wi-Fi when publishing large content sets from the VM.
- Set display scale inside the Windows VM to 100% before starting ClickLearn Attain. See 'Prepare Your Display for Recording'.

2.3. Prepare Your Display for Recording

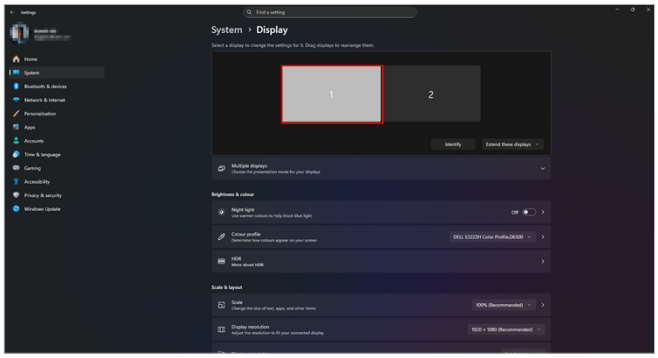
Record cleanly from the first attempt as inconsistent display settings are the most common cause of screenshot misalignment in shared recording environments.

2.3.1. Display Settings

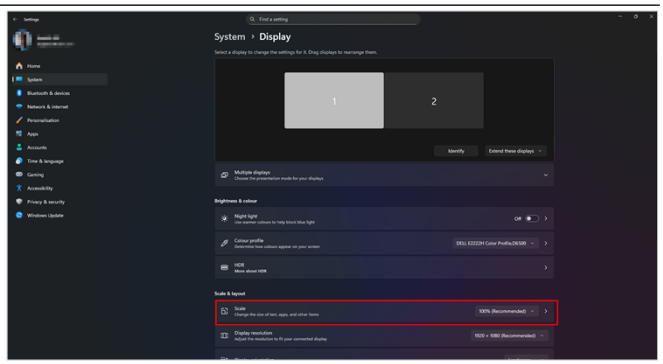
To properly use ClickLearn Attain (or any version of ClickLearn), your desktop needs to have a few basic settings in place. This is because ClickLearn and Windows need to work with each other to read the data on your screen.

Click on the **display**

For users with multiple monitors, the first thing that we want to do is decide on the screen that we will be used to make recordings and set it as our primary screen. Once you have made a decision, select it (it will now be in blue) and tick the checkbox that says “Make this my main display.”



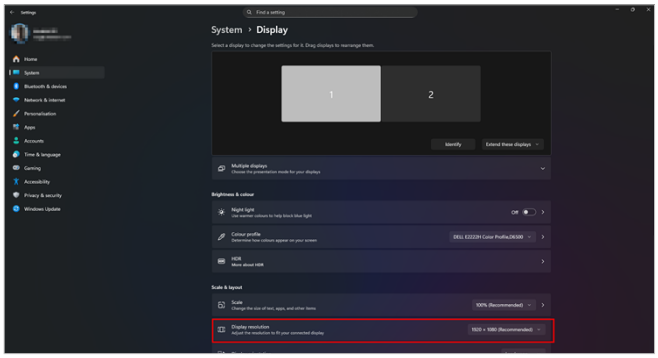
Click on the **Scale & layout**



Choose your **Display**

Next, we want to choose a suitable resolution. This decision will be one of the most important made, especially if working in a collaborative ClickLearn environment.

While everyone has a preference, and it is possible to use any display resolution available, it is best practice for everybody who is contributing to the same record to use the same settings.



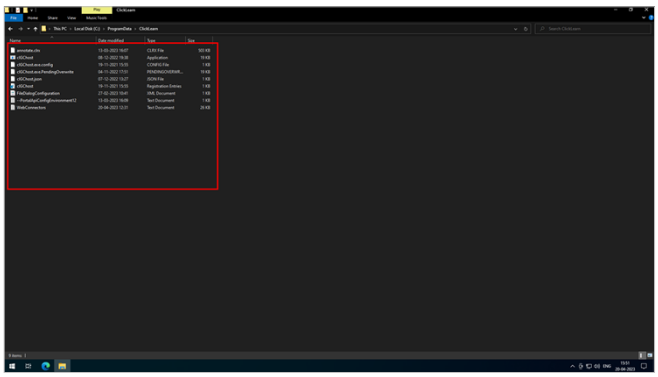
2.4. Configure a Web Proxy

Connect ClickLearn Attain to the internet through your organisation's proxy - so recording and publishing work without manual network workarounds.

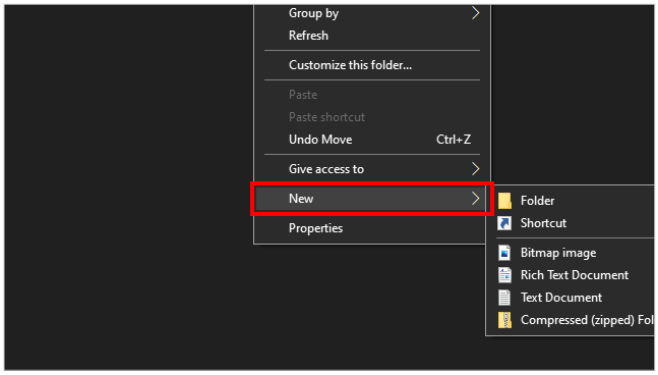
Attain Studio can be accessed through a proxy, and to set up the same, you have to create a file by the name **ClickLearnProxy.txt** in the folder path **C:\ProgramData\ClickLearn**.

2.4.1. Create a proxy file

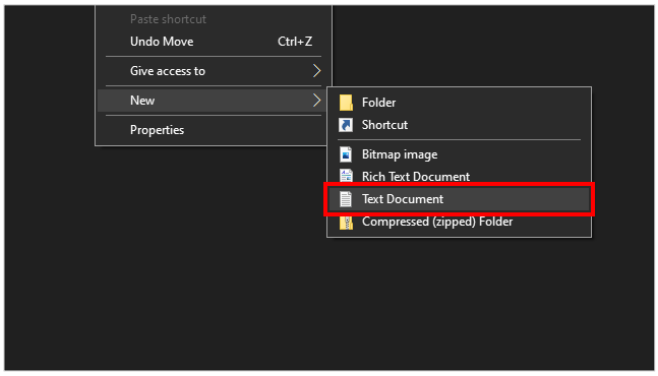
Navigate to folder **C:\ProgramData\ClickLearn**
Right click on the list .



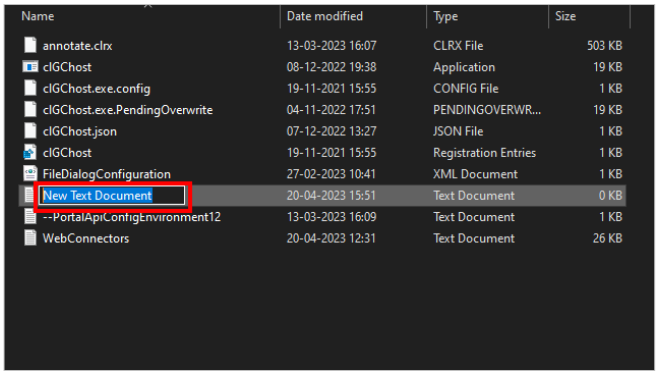
Click on the menu **New**.



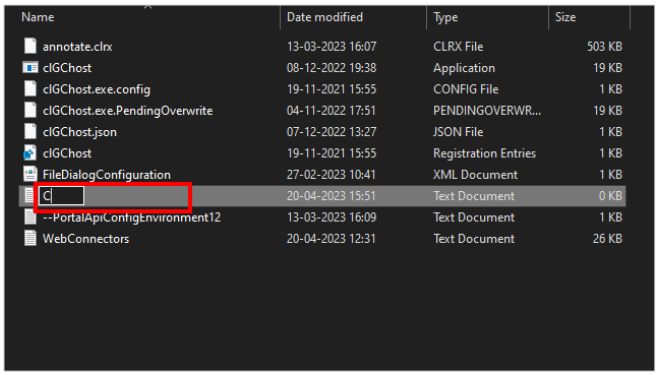
Click on the menu **Text Document**.



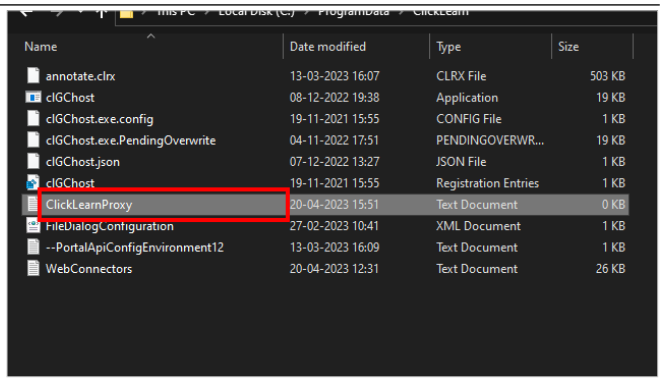
Click on the input field **New Text Document**.



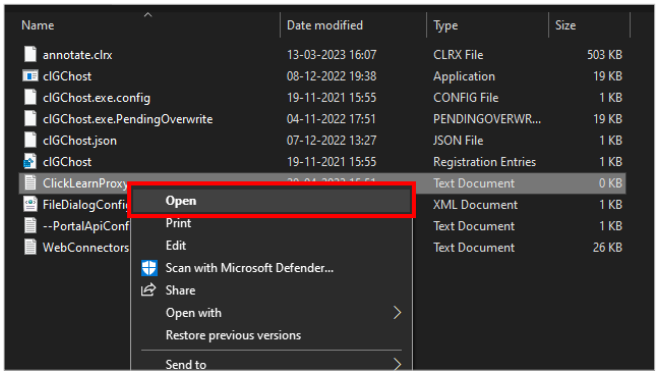
Enter **New Text Document**. Press the **Enter** key.



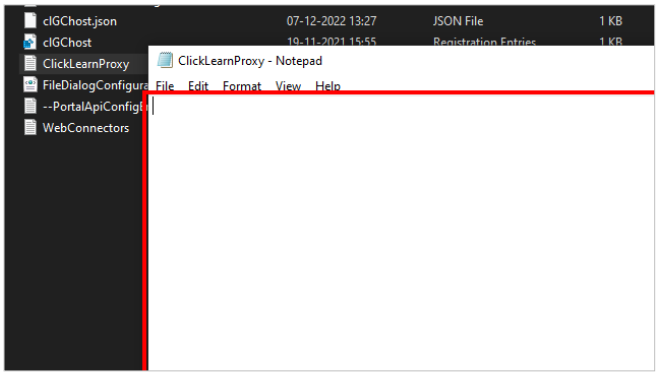
Right click on the input field **Name**.



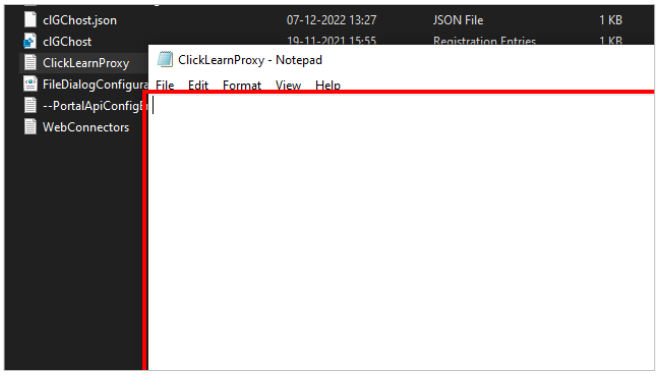
Click on the menu **Open**.



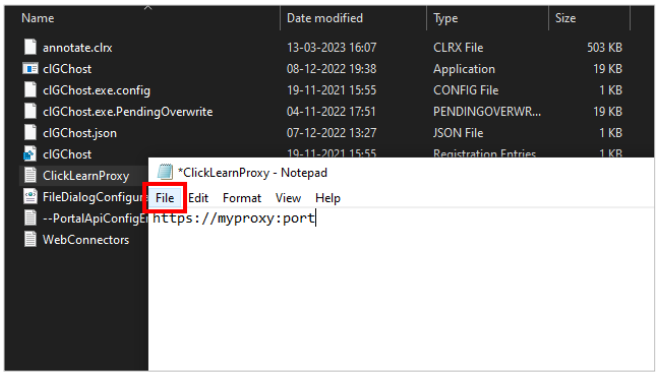
Click on the input field **Text Editor**.



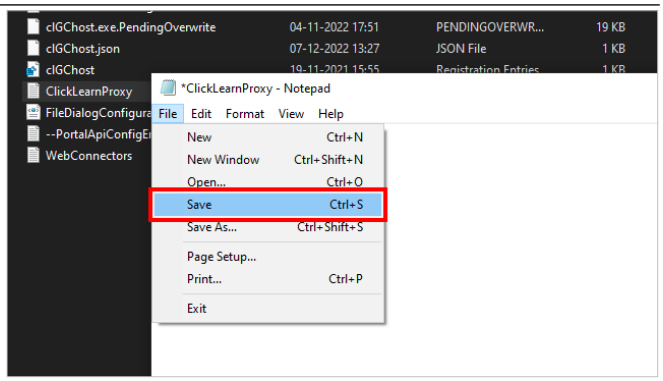
Enter proxy server details



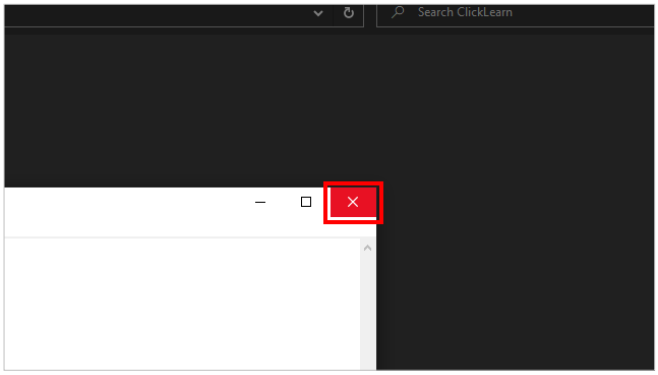
Click on the menu **File**.
You may also press **Alt+F**.



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



Click on the button **Close**.



2.4.2. 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.

2.4.2.1. 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

2.4.2.1.1. 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

2.4.3. 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.

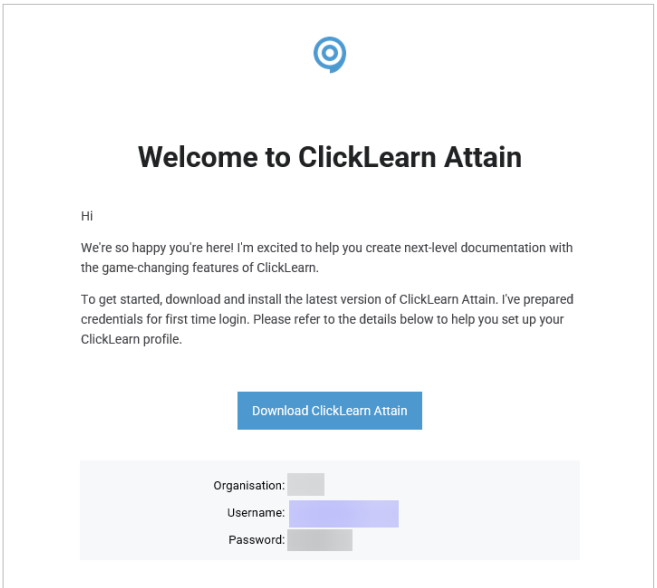
3. Installing ClickLearn Attain

3.1. Install ClickOnce

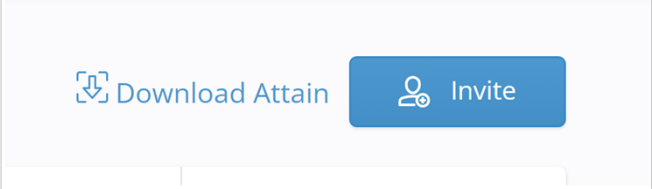
Be up and running to start your documentation journey.

You can download the ClickOnce version from your original License email.

Click on the button **Download ClickLearn Attain**.



Or by logging into your portal and downloading it from your Homepage.



3.2. Install ClickLearn Studio (MSI)

Install a specific version of ClickLearn Studio and control when updates are applied. It is suited for managed environments where automatic updates are not permitted.

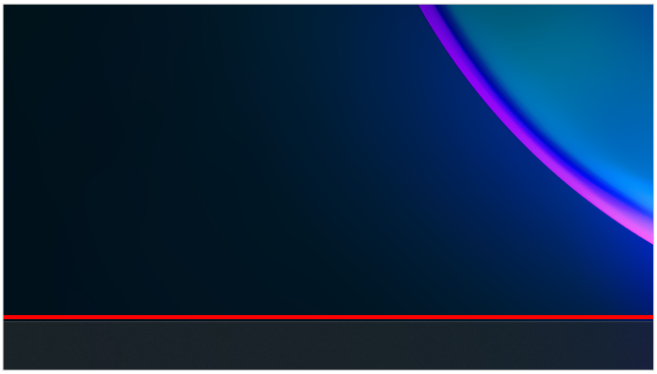
3.2.1. Introduction

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.

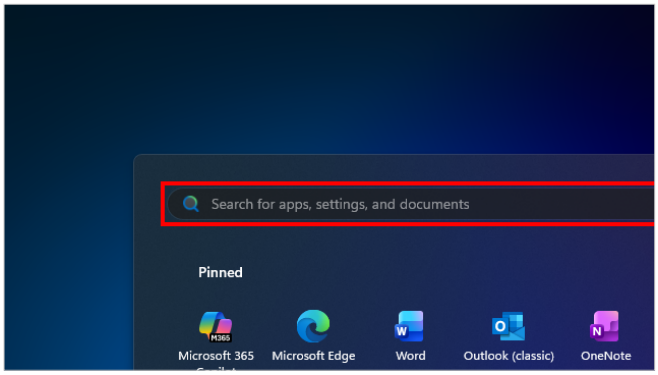
3.2.2. Uninstall Old Version of ClickLearn Studio

This guide outlines the standard procedure for removing outdated installations of ClickLearn Studio. Ensuring a clean removal of legacy software prevents version conflicts and optimizes your system for future deployments.

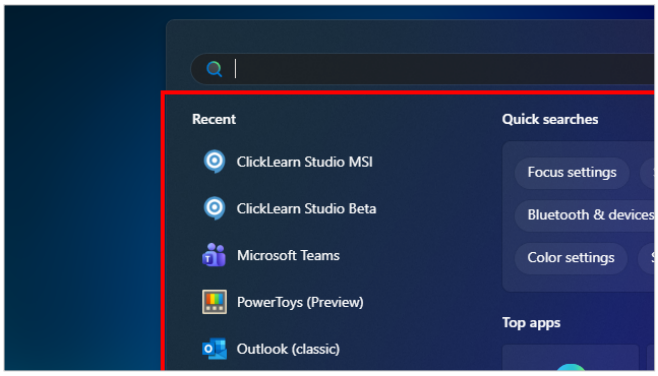
Click on .



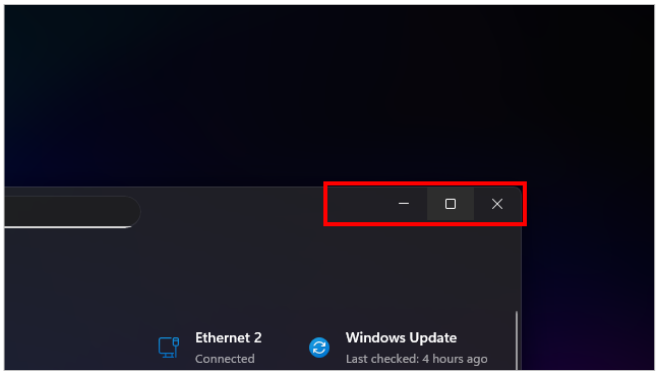
Click on the button **Search for apps, settings, and documents**.



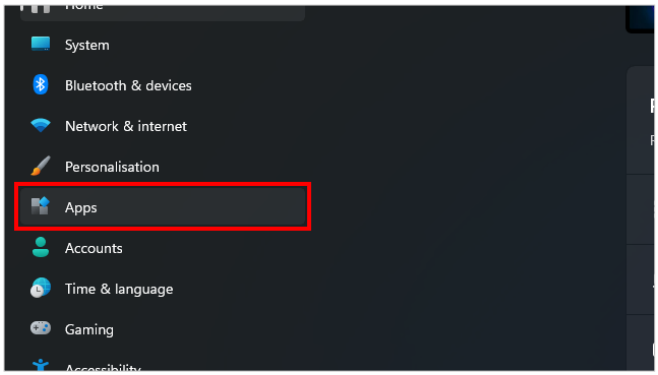
Click on .



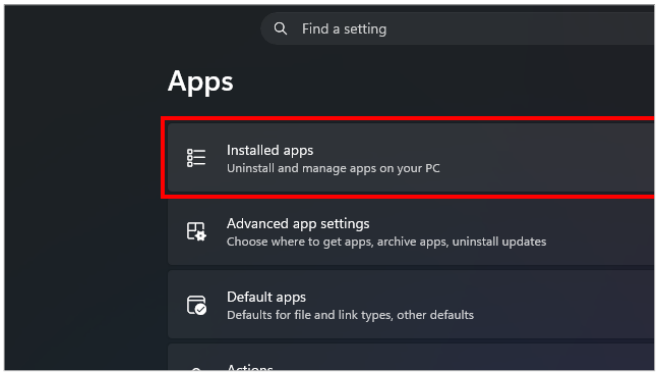
Click on .



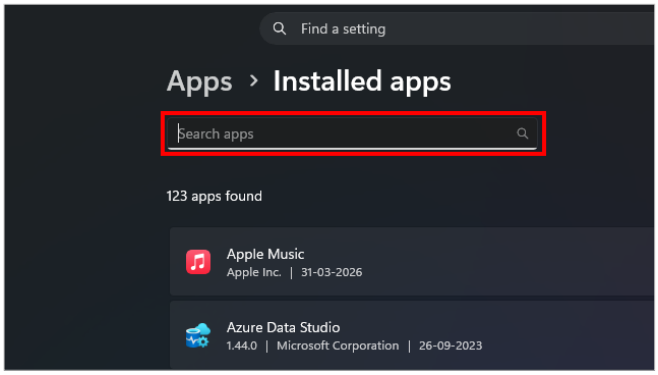
Click on the list element **Apps**.



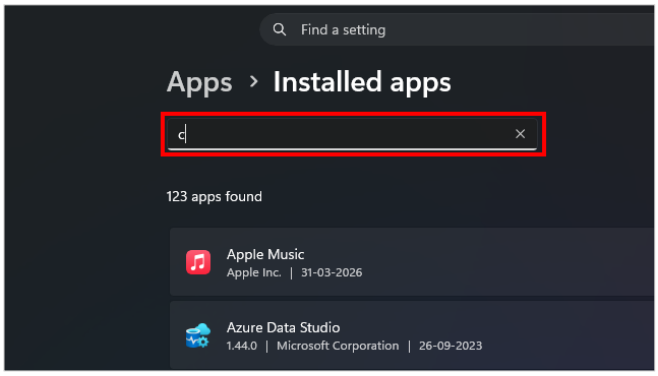
Click on the group **Installed apps**.



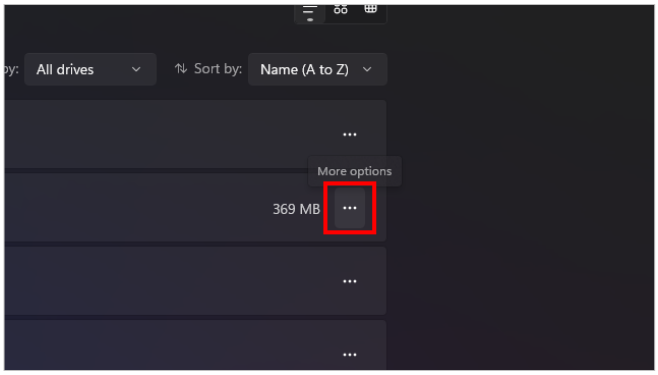
Click on the input field **Search**.



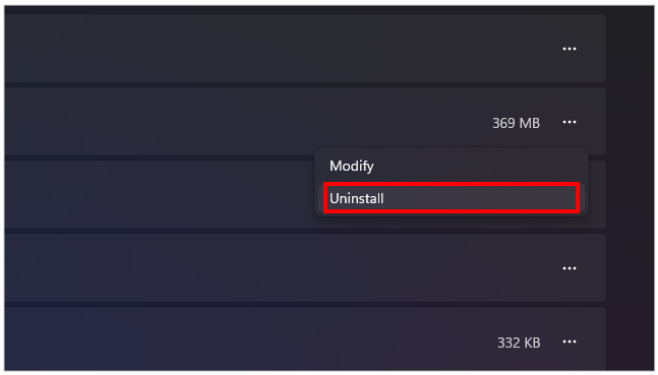
Enter **Search**.



Click on the button **More options**.

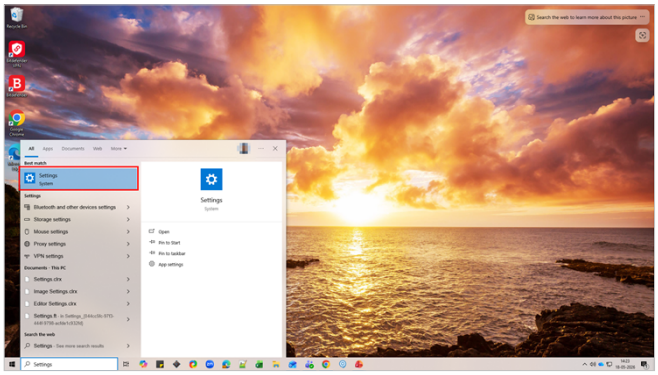


Move the mouse to **Uninstall**.



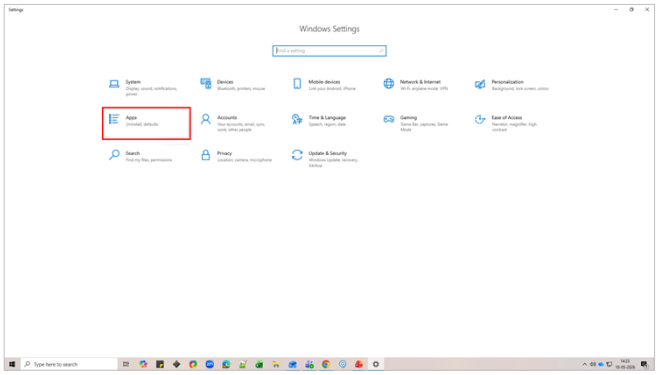
Open the Windows Start menu.

In the search bar, type **Settings** and select the application from the results.

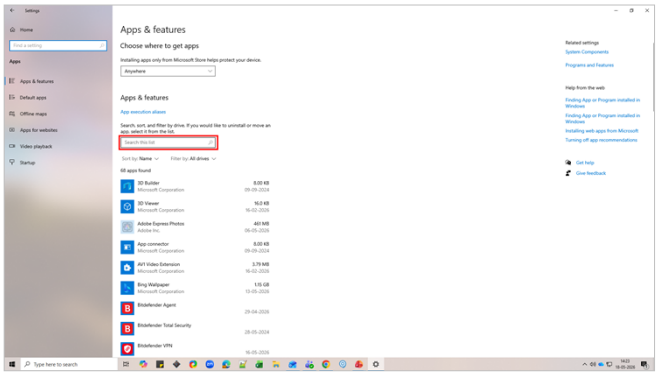


Within the Settings menu, select the **Apps** category from the sidebar or main dashboard.

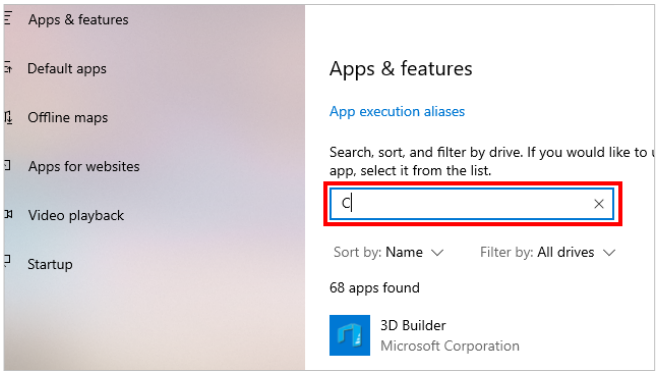
Note: - This is the procedure for Windows 10 Enterprise



Locate the **Search** this list input field.

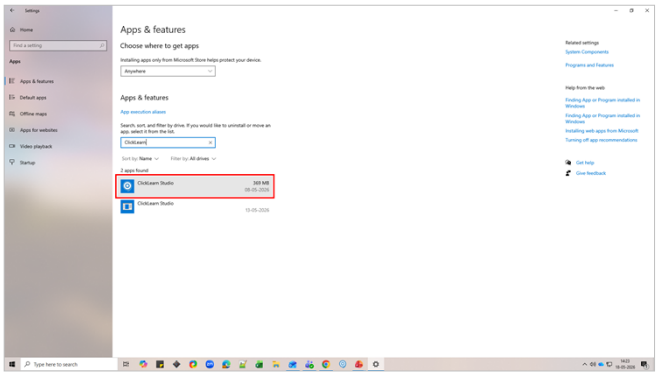


Type **ClickLearn** into the search box to filter the application directory.



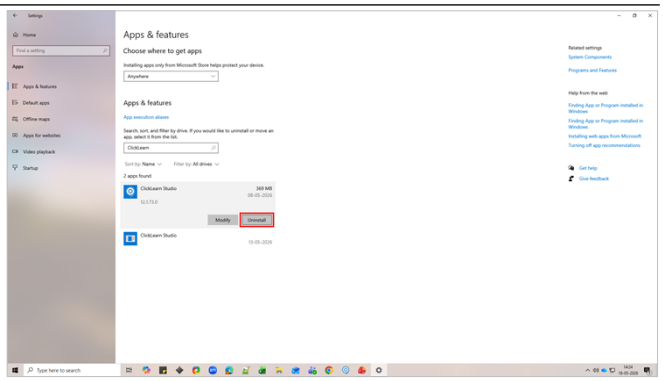
Select the specific **ClickLearn Studio** entry from the filtered results.

Note: - Before you move on, make sure to uninstall every single instance of ClickLearn Studio that shows up in your search list.



Click on the button **Uninstall**.

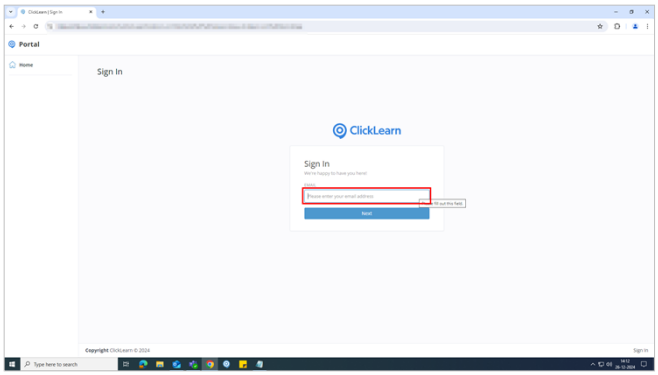
Follow any remaining on-screen prompts to completely remove the application files.



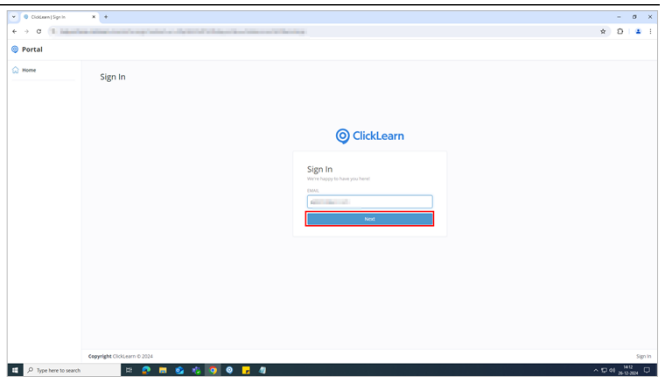
3.2.3. Download MSI Package

3.2.3.1. Login to Portal

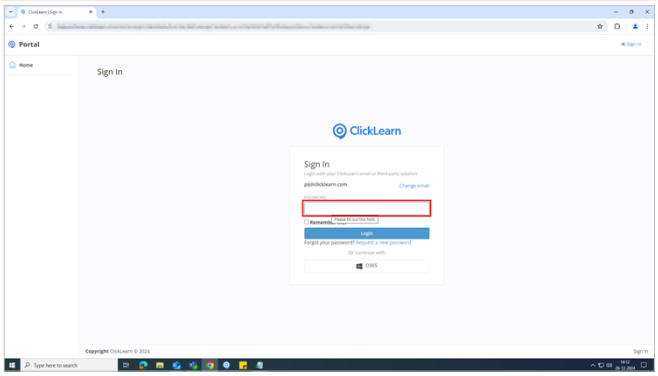
Click on the input field **EMAIL** and enter email address.



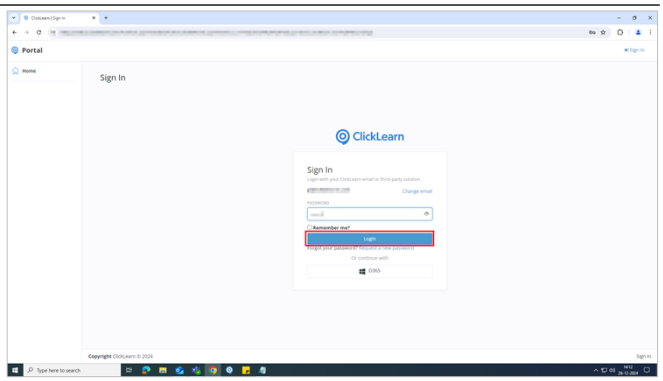
Click on the button **Next.**



Click on the **password** field and enter your password.

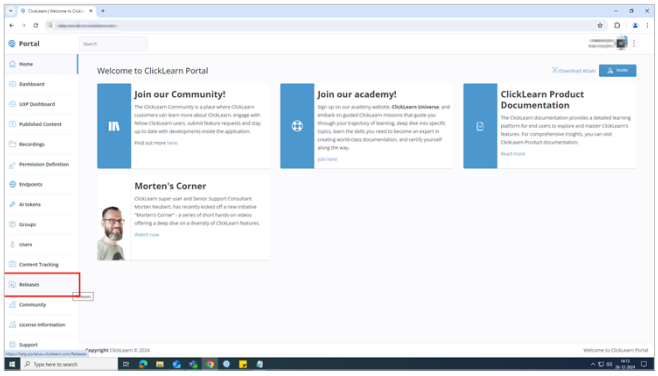


Click on the button **Login.**

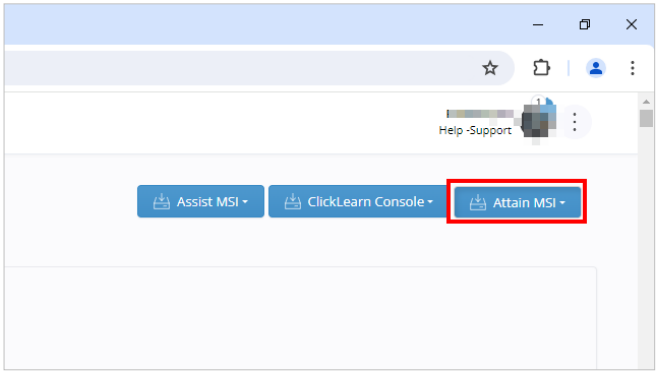


3.2.4. Download MSI

Click on the button **Releases.**



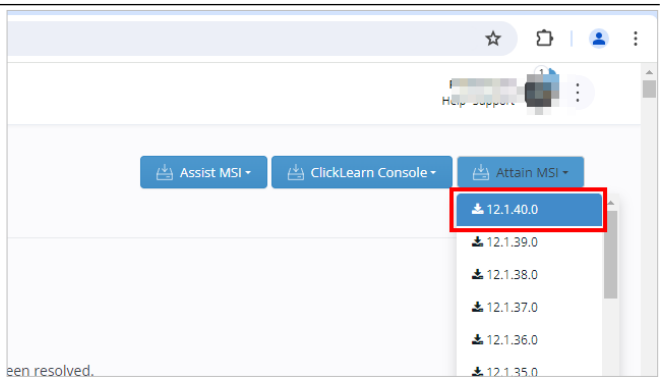
Click on the button **Attain MSI**.



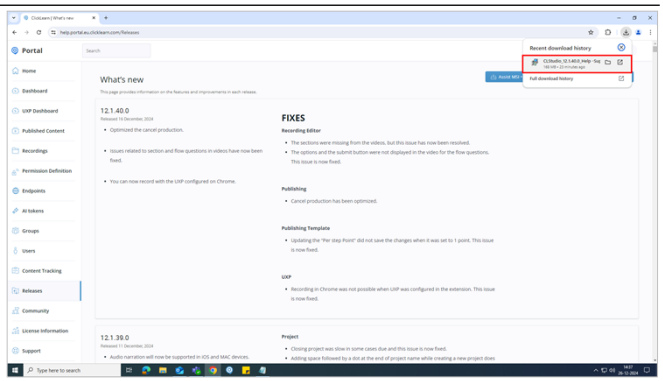
Select the version for which you wish to download the MSI.

In this case the latest version of attain is **12.1.40.0.**

Click on the link **12.1.40.0**



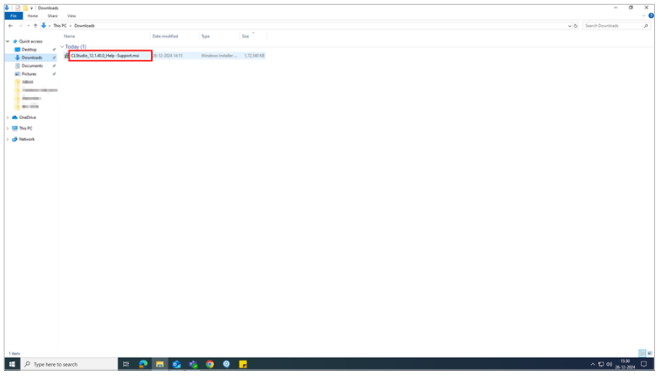
After clicking the link, the download should start immediately. Otherwise, if the package is not prepared, the system will prepare one and notify you, and you can download it from the notifications in the portal.



3.2.5. How to Install Downloaded MSI

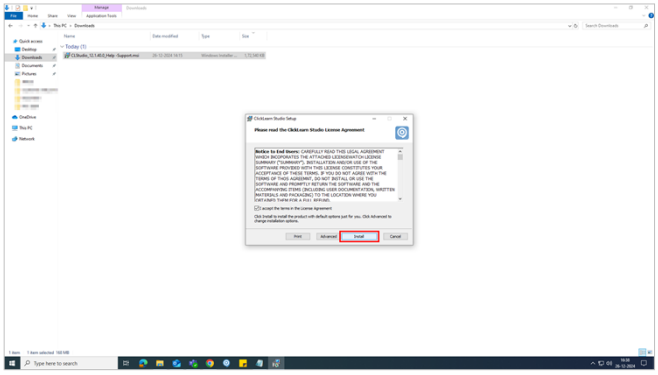
Open windows explorer and navigate to the folder where the latest MSI is present.

Double click on the package to start the installer wizard.

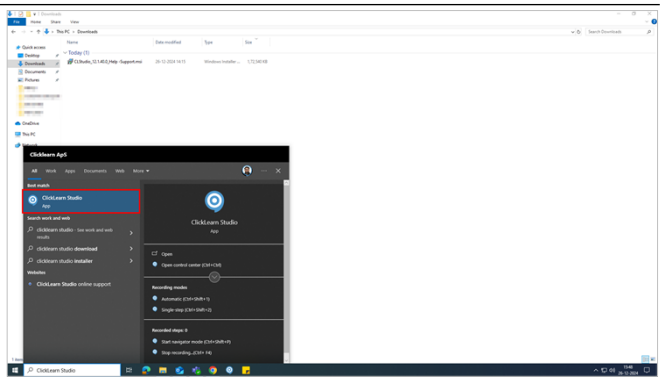


Please go through the terms and accept the license agreement.

Click on the button **Install**

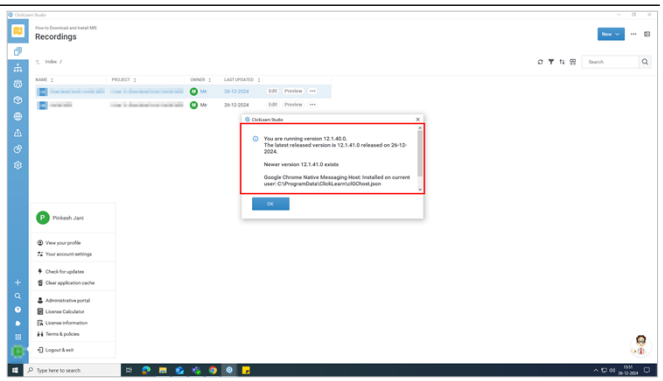


After installation is completed, you can open the studio by searching in Start menu.



Latest version is now installed.

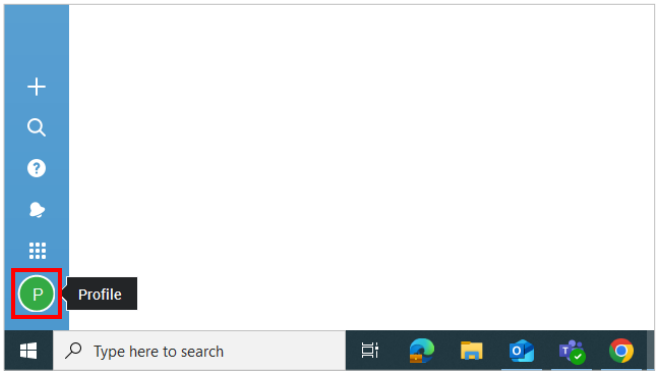
In order to use latest version, you have to uninstall the previous version of studio. Here are the steps to uninstall old version:



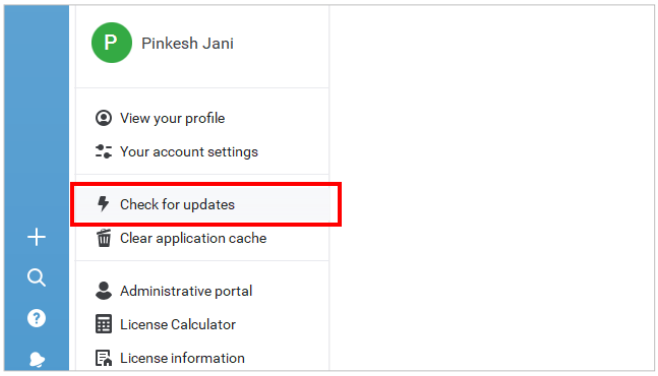
3.2.6. Check for Updates

ClickLearn Studio regularly releases new updates with improvements and bug fixes. It is recommended to check for updates periodically to ensure you are always running the latest version.

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

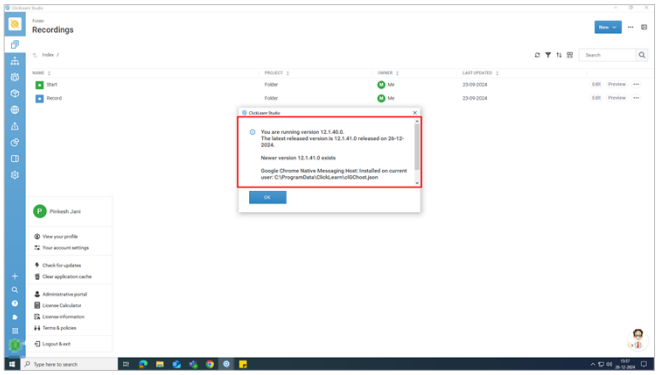


Click on the label **Check for updates.**



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

Click on the button **OK**



3.3. Installing Extension for Browser

Record actions in Chrome or Edge as without the connector, web-based business systems cannot be captured by ClickLearn Attain.

3.3.1. Browser Installation Options

Record actions in Chrome or Edge. Without the browser connector, web-based business systems cannot be captured by ClickLearn Attain.

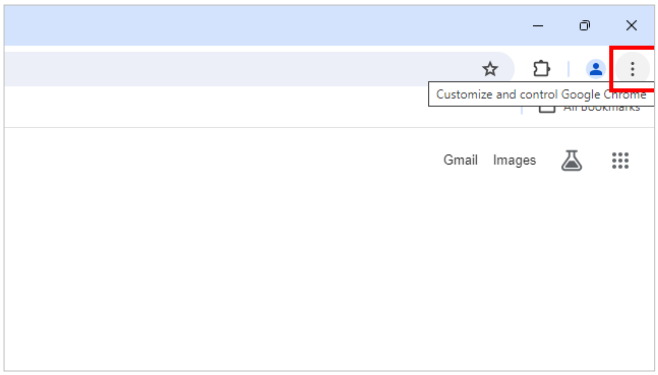
Its important to understand why the connector is required, then walks the setup: first disable background running for the browser (a prerequisite, done before the install steps), then follow the Chrome install steps or the Edge install steps.

Install the connector before recording any web application so every element is captured correctly.

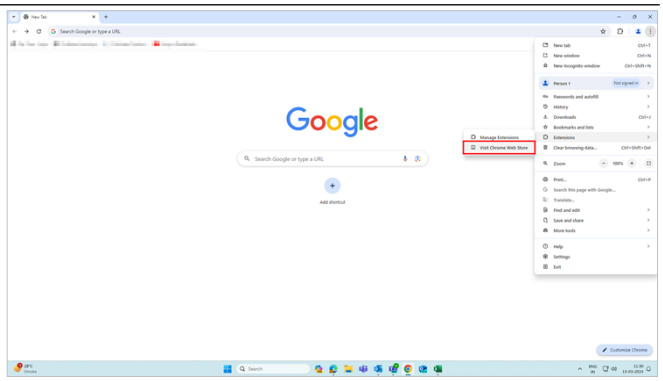
3.3.2. Google Chrome Connector

3.3.2.1. Install Extension

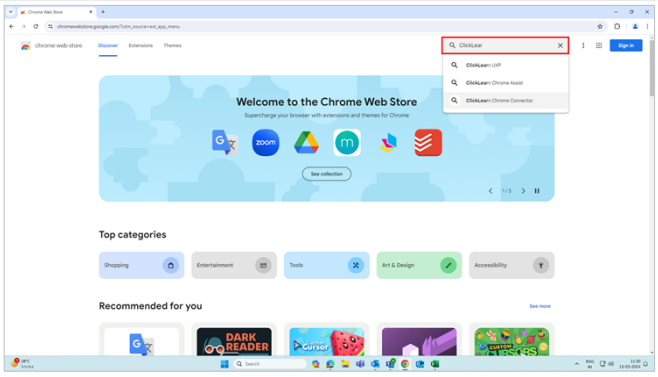
Click on **Chrome**.



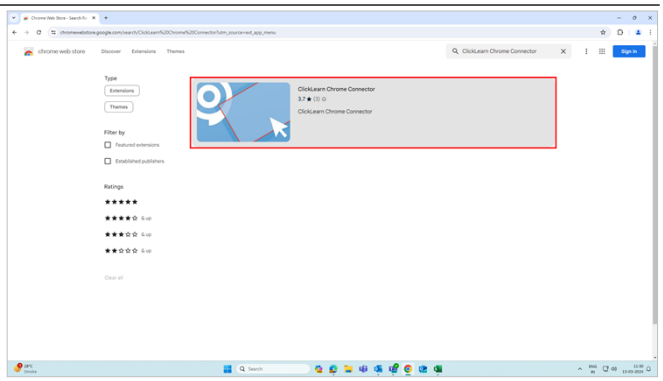
Hover the mouse over the option **Extensions** and select **Visit Chrome Web Store**.



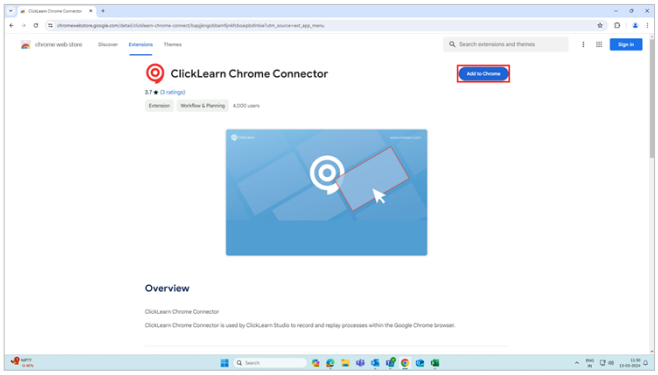
In the search box, type **ClickLearn Chrome Connector** or choose from the dropdown.



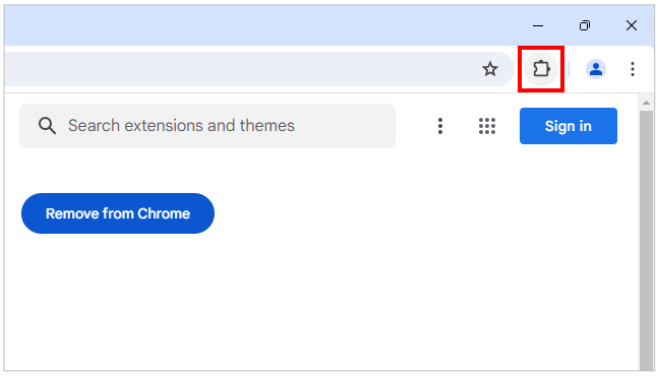
Click on **ClickLearn Chrome Connector**.



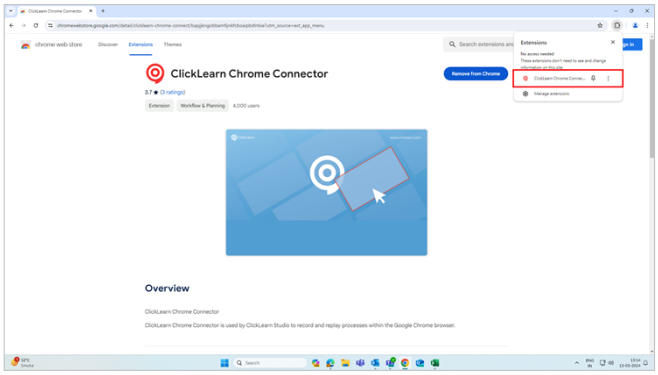
Click on the button **Add to Chrome**.



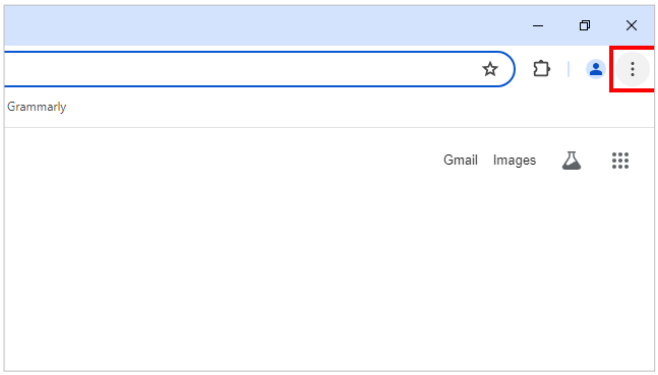
Click on **Extensions**.



The **ClickLearn Chrome Connector** extension is now added to Chrome.



Click on **Chrome**.

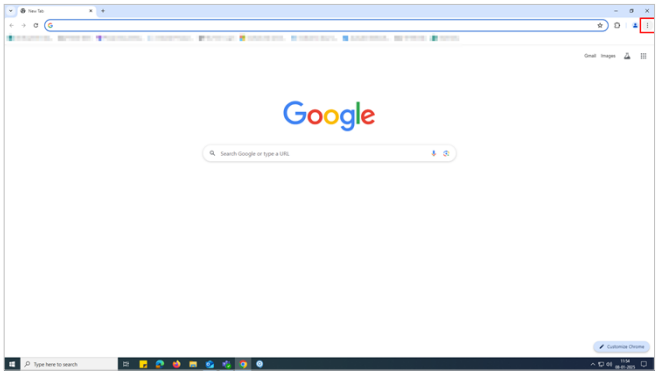


3.3.2.1.1. Steps to Disable Background Running in Chrome

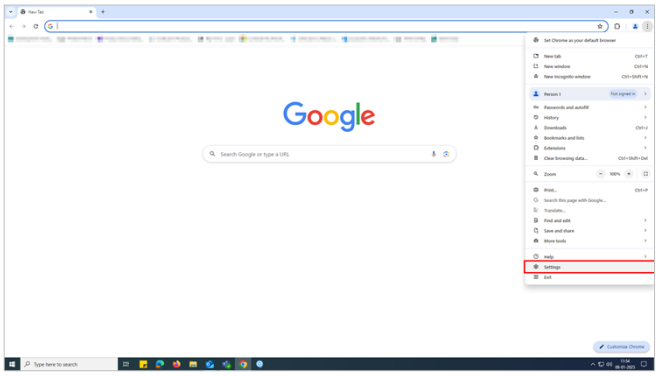
To ensure a smooth installation of ClickLearn, it's necessary to turn off specific settings in Google Chrome that could interfere with the process. The settings are:

Continue running background apps when Google Chrome is closed (keeps Chrome running in the background even after you close the browser, which can cause conflicts during installation).

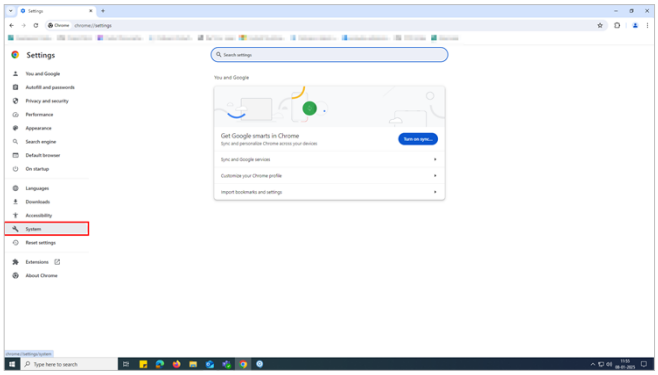
Click on the **three vertical dots** (menu icon) in the top-right corner of your browser.



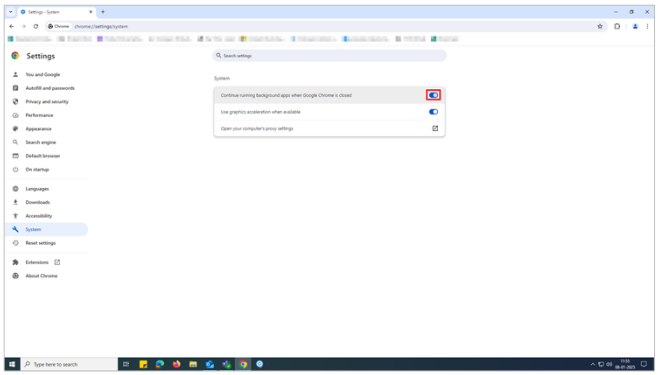
Select **Settings** from the dropdown menu.



Scroll to the bottom of the Settings page and Click on **System**.



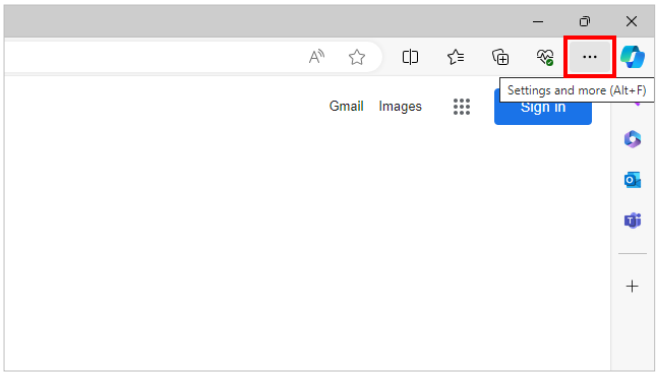
Toggle the switch to off **(it should be greyed out when disabled).**
You can now close the Settings tab, and you're ready to install **ClickLearn**.



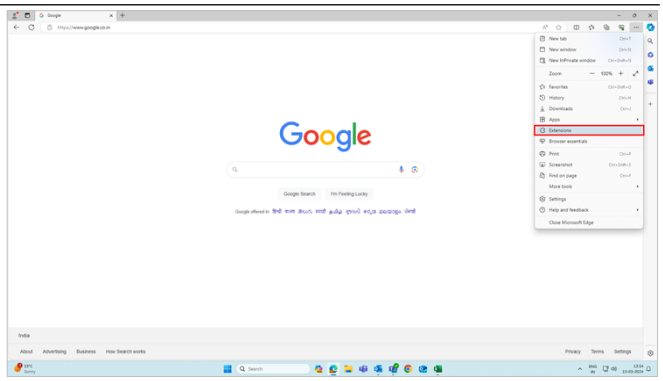
3.3.3. Microsoft Edge Connector

3.3.3.1. Install Extension

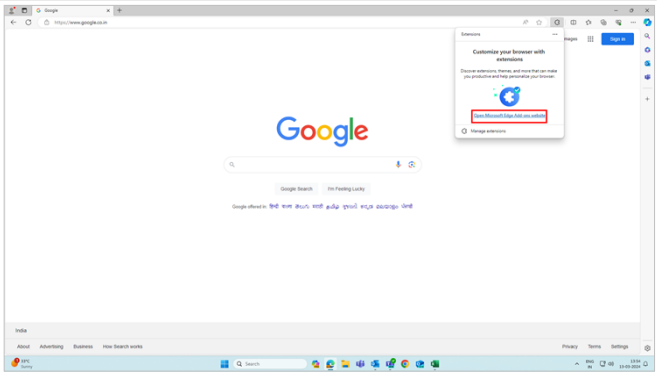
Open the Microsoft Edge and click on the button **Settings and more (Alt+F)**.



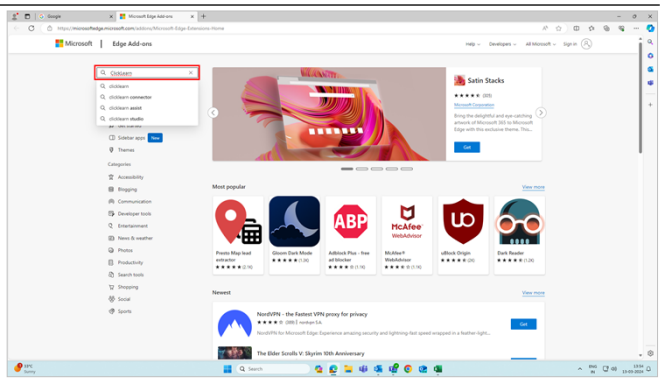
Click on the button **Extensions**.



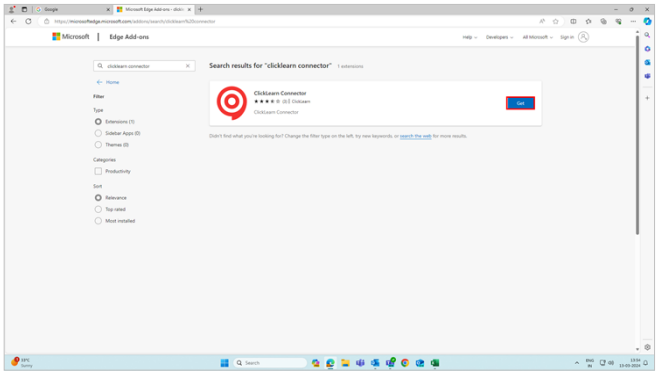
Click on the **Open Microsoft Edge Add-ons website**.



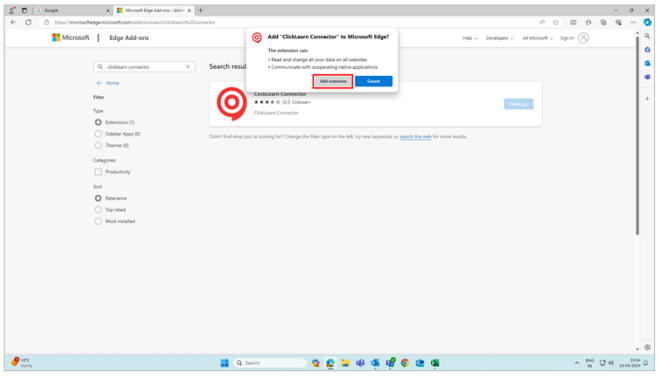
In the search box, type **ClickLearn Connector** or choose from the dropdown.



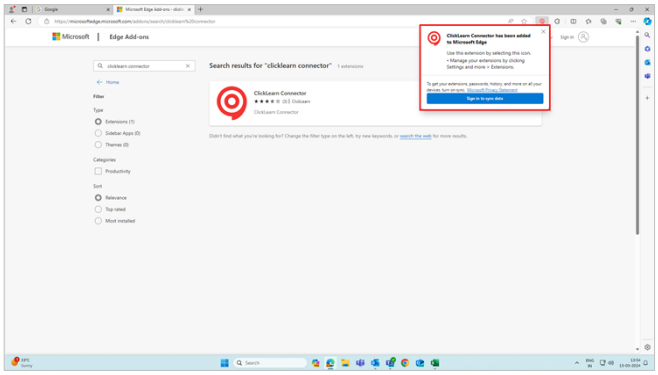
Click on the button **Get**.



Click on the button **Add extension**.



The **ClickLearn Connector** is now added to Microsoft Edge.

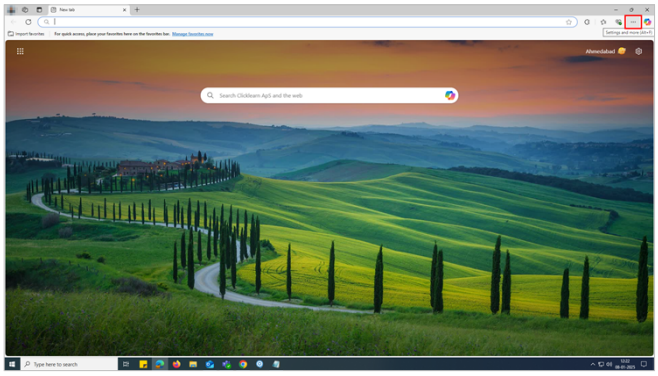


3.3.3.1.1. Steps to Disable Background Running in Edge

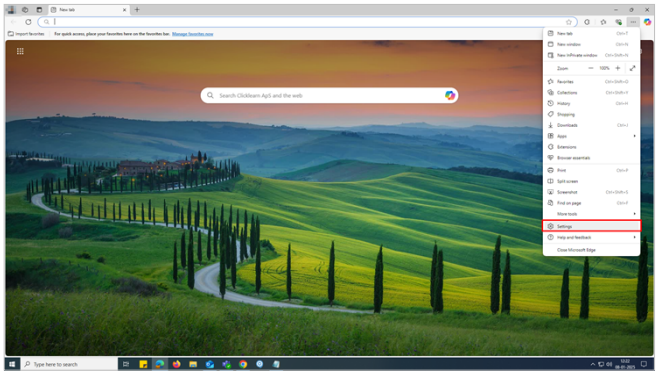
To ensure a smooth installation of ClickLearn, it's necessary to turn off a couple of settings in Microsoft Edge that could cause interference. These settings are:

- **Startup Boost** (prevents Edge from starting faster when you boot up your computer and may keep processes running unnecessarily).
- **Continue running background apps when Microsoft Edge is closed** (keep Edge running in the background after you close the browser, which may conflict with the installation process).

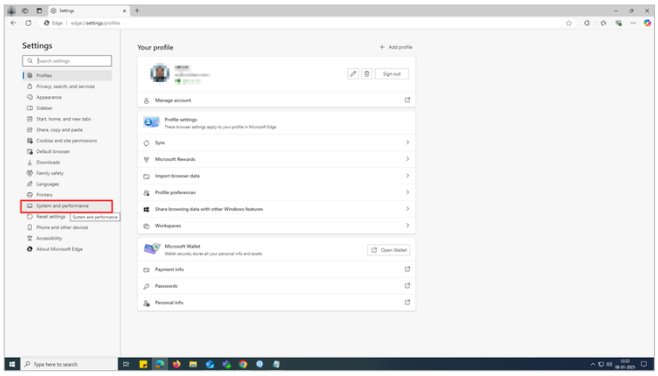
Click on the three **horizontal dots** (menu icon) in the top-right corner.



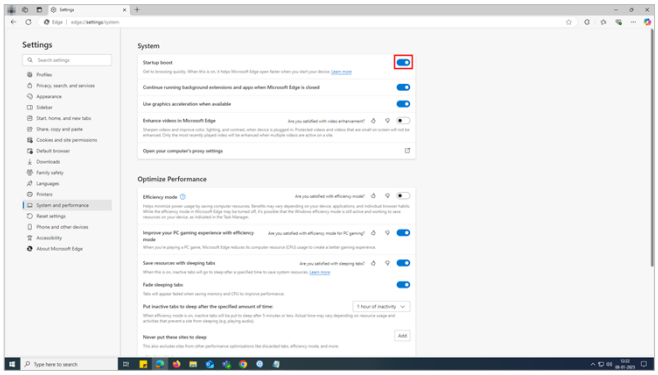
Select **Settings** from the dropdown menu.



On the left-hand sidebar, click on **System and performance** under the Settings section.



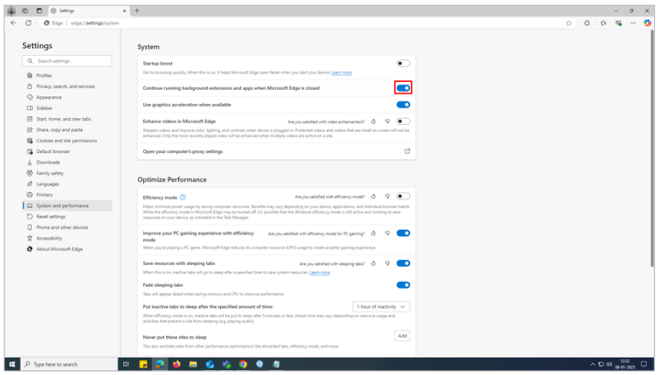
Find the option labeled **Startup Boost** and toggle the switch **off**.



Find the option labeled **Continue running background apps when Microsoft Edge is closed**.

Toggle the switch to **off**.

You can now close the Settings tab, and you're ready to install **ClickLearn**.



Once you've completed these steps, the browser will no longer run in the background after you close it, allowing the ClickLearn installation to proceed without any issues. Now, you can continue with the installation of ClickLearn by clicking on the install link provided.

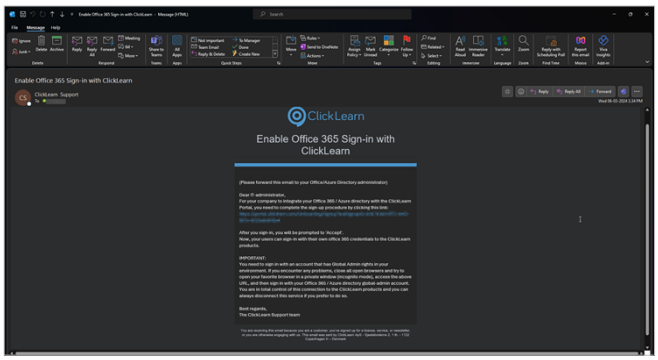
4. Deploy for IT Administrators

4.1. Configure O365 SSO

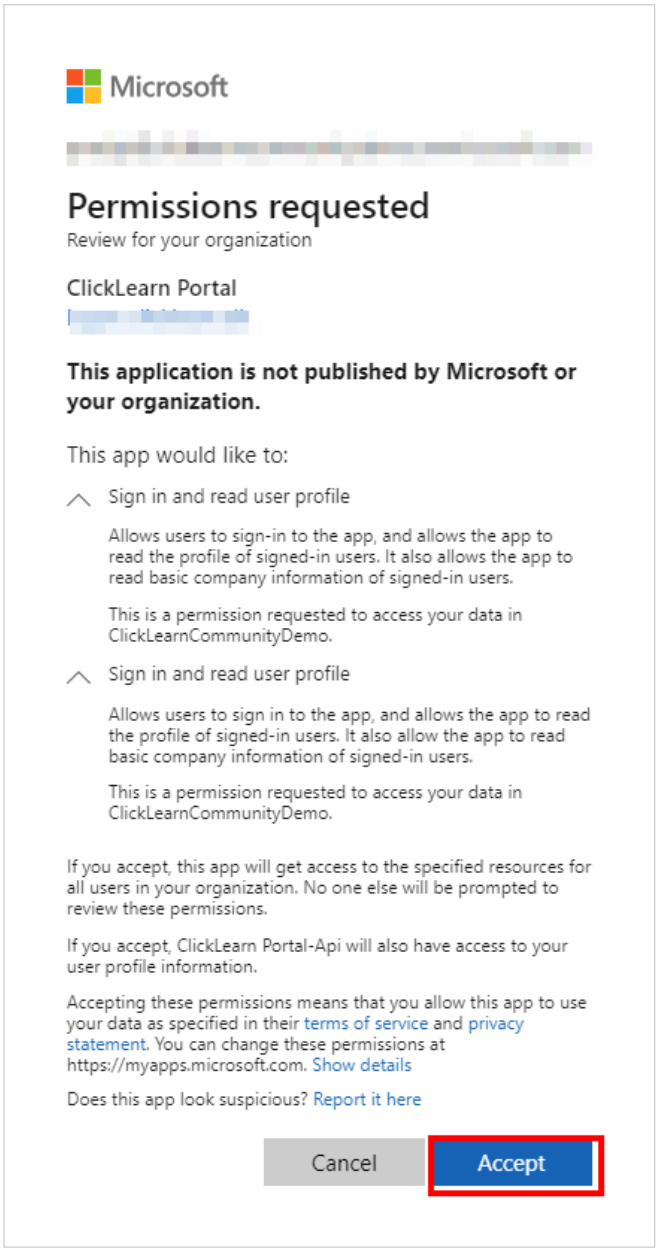
Let your users sign in with their existing Microsoft credentials, eliminating the need for a separate password and reducing the authentication friction that leads to login support tickets.

4.1.1. Steps to Configure

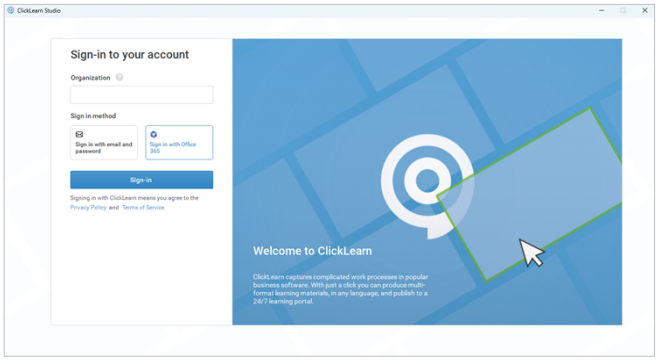
To initiate the Office 365 login process, contact ClickLearn support to receive an email with the link and ask them to enable Office login in your company. Then, forward the link to the Azure administrator to enable access.



Upon clicking the URL, Azure AD will receive the below screen where they should "Accept" to proceed.



After receiving the confirmation from the Azure administrator, enter the CNAME and select Sign in with Office 365.



NOTE: The administrator requires authorization from the client to access user profiles, which include details like full name, email address, and organization name. Without this permission, users cannot log in via Single Sign-On (SSO).
The MS graph provides the user profile data. The administrator grants consent for each user, making this a process that relies solely on administrative-level approval.
Therefore, individual users cannot grant permission to log in from their AD without the AD Administrator first reviewing and approving the policy.

By approving, ClickLearn will create enterprise apps as below:

- **ClickLearn Portal** - For portal and studio access.
- **Clicklearn Portal-Api** - For content access.

4.2. Deploy the Assist via GPO

Roll out the browser connector to all domain-joined machines without requiring any action from individual users, ensuring consistent coverage across your organisation.

4.2.1. Standard Operating Procedure (SOP)

4.2.1.1. Setting up ClickLearn Assist Extension as a Logon Script in a Domain Controller

4.2.1.1.1. Objective

Follow these steps to set up the ClickLearn Assist extension batch file as a logon script on a Domain Controller (DC) and ensure it applies exclusively to specific users using Group Policy.

4.2.1.1.2. Prerequisites

- Access to the Domain Controller with administrative privileges.
- Download the ClickLearn Assist extension batch file: installationforassistonallusers.bat. (Available here: https://apps.clicklearn.com/BrowserExtension/assist/installationforassistonallusers.bat).
- Familiarity with Group Policy Management.

4.2.1.1.2.1. Steps

4.2.1.1.2.2. Step 1: Download and Prepare the Batch File

1. Download the ClickLearn Assist extension batch file from the following link: https://apps.clicklearn.com/BrowserExtension/assist/installationforassistonallusers.bat

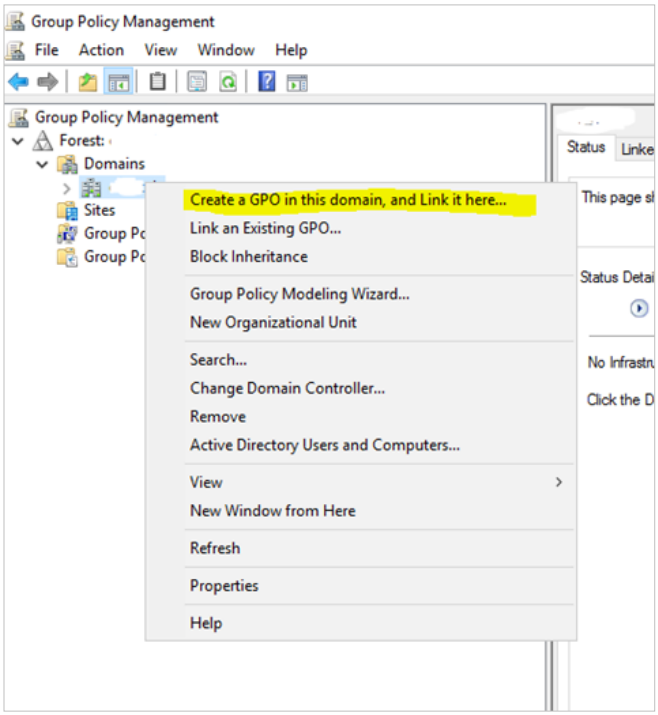
Store the downloaded batch file in the SYSVOL directory to ensure it is accessible across all Domain Controllers.

2. Path: \YourDomainName\SYSVOL\YourDomainName\scripts

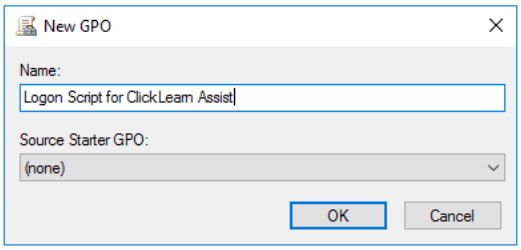
4.2.1.1.2.3. Step 2: Create a Group Policy Object

1. Open Group Policy Management Console.
2. Create a new GPO.

- In the Group Policy Management Console, right-click on the Organizational Unit (OU) containing the target users or on the domain root.
- Select Create a GPO in this domain, and link it here.

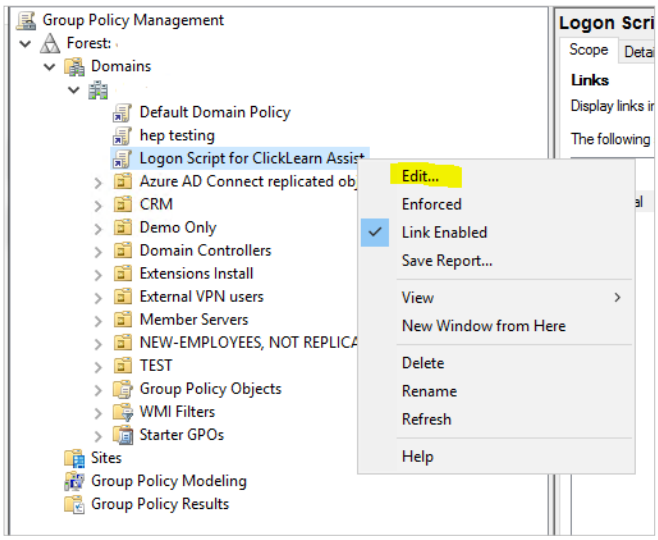


- Name the GPO, for example, Logon Script for ClickLearn Assist.



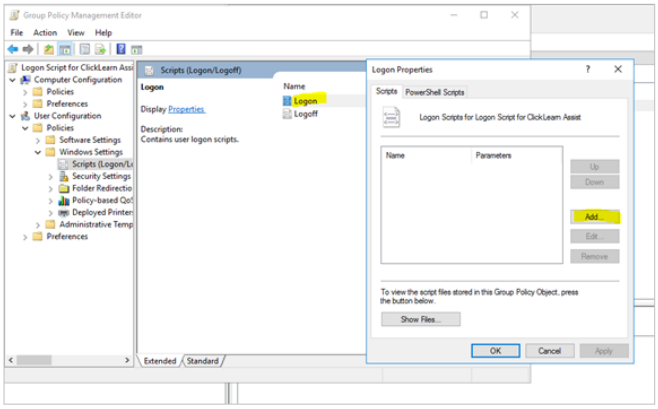
4.2.1.1.2.4. Step 3: Edit the GPO to Add the Logon Script

Edit the GPO: Right-click the newly created GPO and select Edit.



Navigate to the Logon Script Setting:

- In the Group Policy Management Editor, click on User Configuration > Policies > Windows Settings > Scripts (Logon/Logoff).



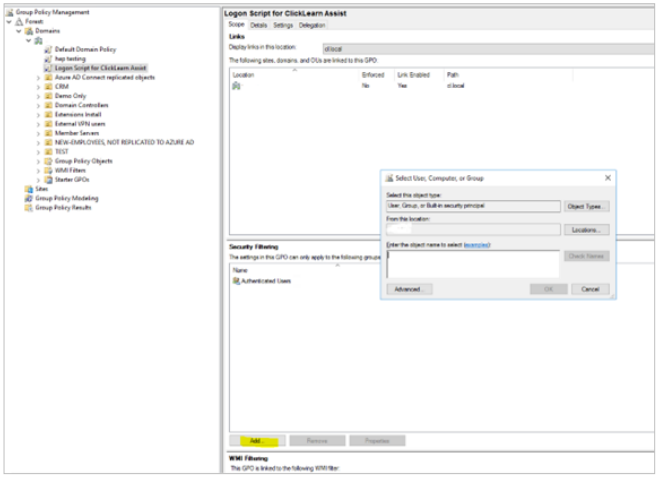
Assign the Logon Script:

- In the Logon properties, click the Add button.
- Click Browse and go to the location where your batch file (installationforassistonallusers.bat) is stored.
- Select the script and click on OK to add it.

4.2.1.1.2.5. Step 4: Filter the GPO to Apply to Specific Users

Security Filtering:

- Return to the Group Policy Management Console and select your GPO (Logon Script for ClickLearn Assist).
- Under the Scope tab, locate Security Filtering.
- Remove "Authenticated Users" to prevent the GPO from applying to all users.
- Click Add and enter the specific users or a security group containing the users you want this logon script to apply.



4.2.1.1.2.6. Step 5: Test the GPO

Update Group Policy:

- On a target machine, open the Command Prompt and run gpupdate /force to force a Group Policy update.
- Log off and then log back in as one of the targeted users to ensure the logon script runs.

Verify the GPO Application

- Run the gpresult /r command on a client machine to verify that the correct GPO has been applied to the user.
- Ensure that the logon script has executed as expected.

4.2.1.1.2.7. Step 6: Troubleshooting

Check Path and Permissions:

- Please verify that the batch file path is correct and accessible by all required users.

Verify Group Policy Application:

- Ensure the GPO is correctly linked and the user has the necessary permissions to run the script.

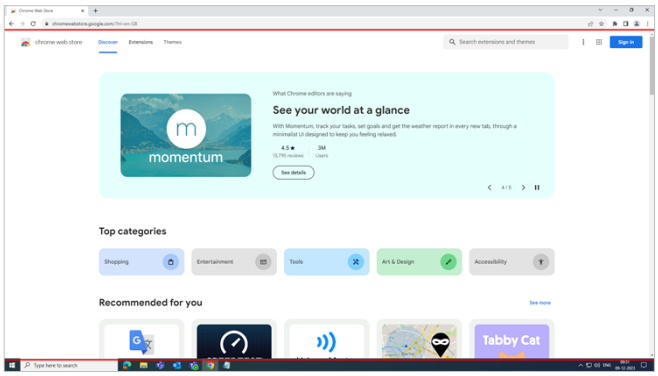
4.3. Deploy and Configure UXP

Enable in-app guidance in your browser without waiting for an IT deployment; useful for authors testing UXP before rolling it out organisation-wide.

4.3.1. Steps to install ClickLearn UXP Extension

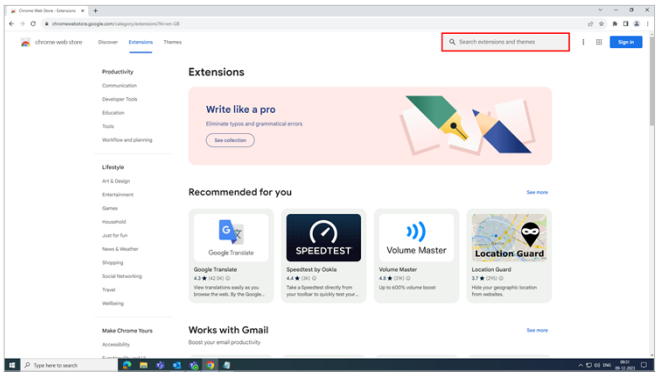
To install the ClickLearn UXP Chrome extension, follow the steps listed below.

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

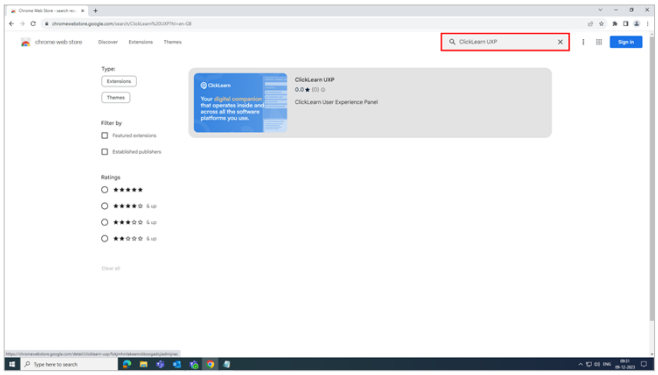


Following are the steps for the Google Chrome browser; you can follow the same steps for Microsoft Edge.

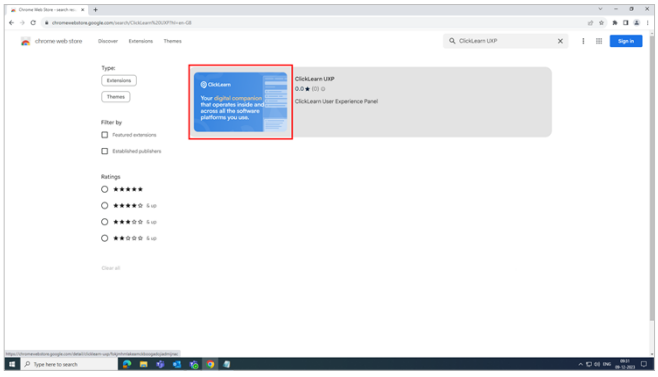
Click on the **search box**.



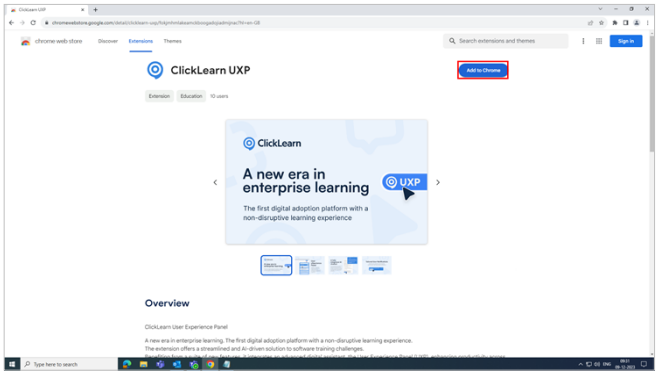
In the search box, type **ClickLearn UXP**.



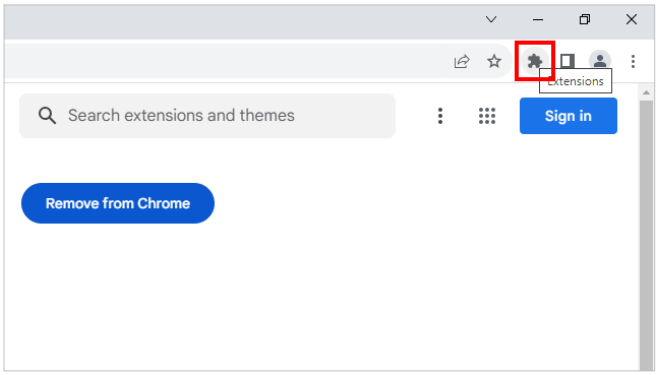
Click on the **UXP**.



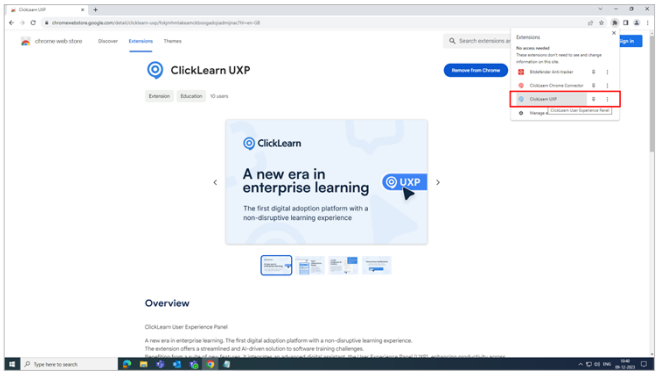
Click on the button **Add to Chrome**.



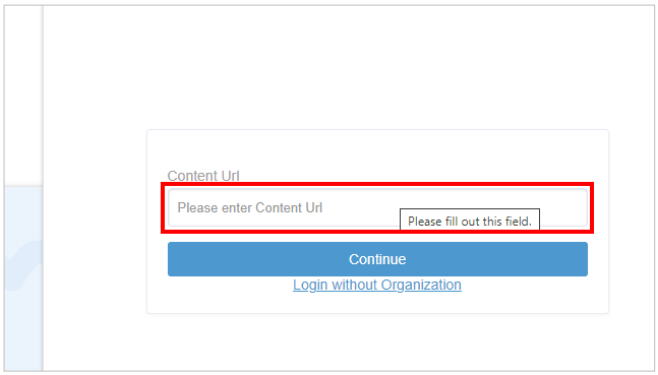
Click on **Extensions**.



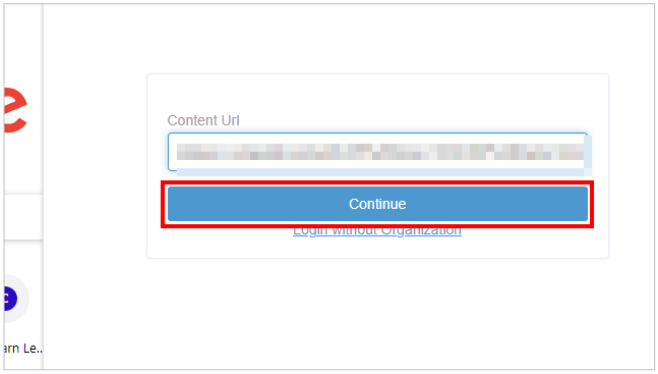
From the extensions, select **ClickLearn UXP**.



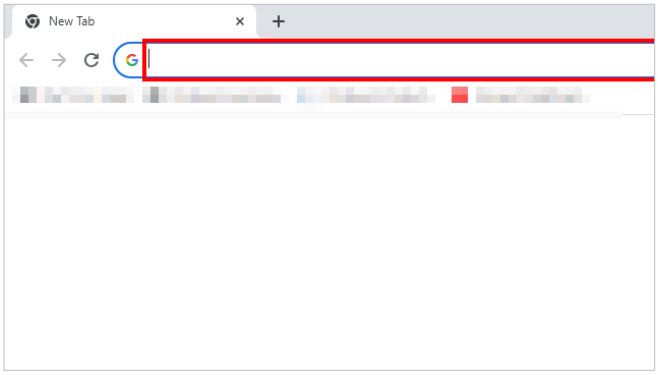
Click on the input field. **Please enter the content URL**.



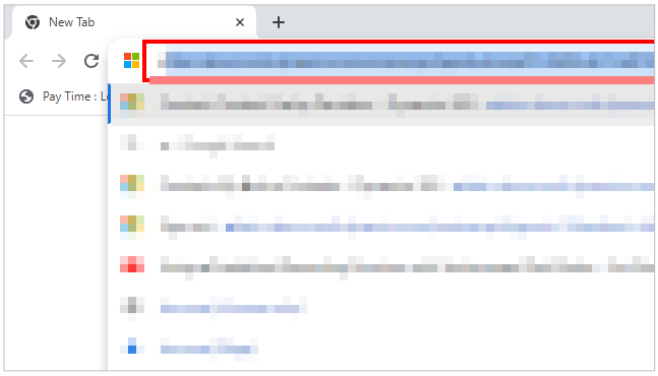
Here, you need to enter the content URL from the publication page. Copy and paste the content URL and click on the button **Continue**.



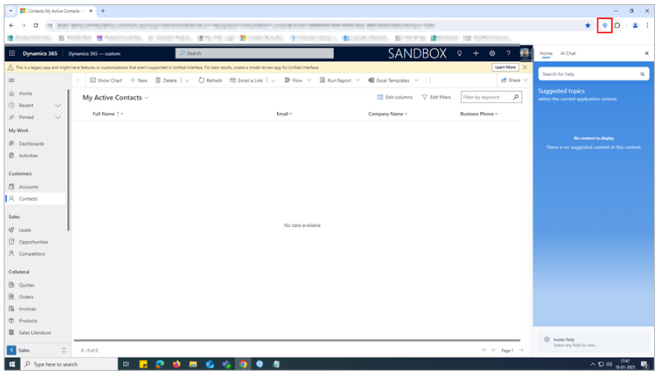
Click on the input field **Address and search bar**.



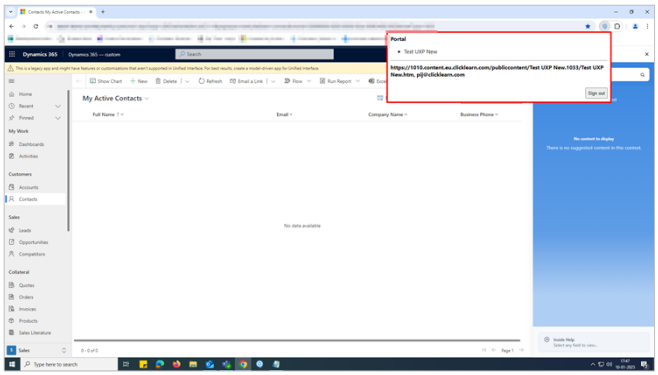
Enter the URL of the application.



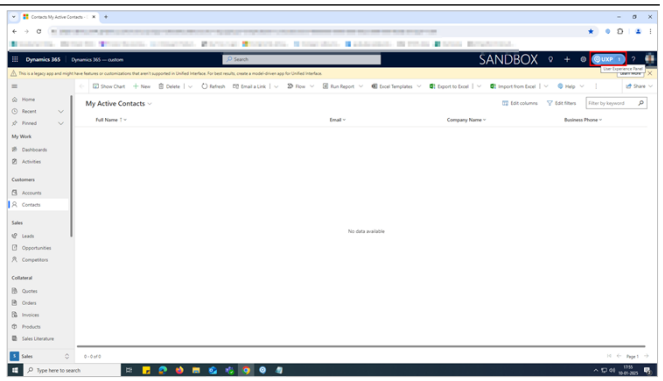
Click on **ClickLearn User Experience Panel**.



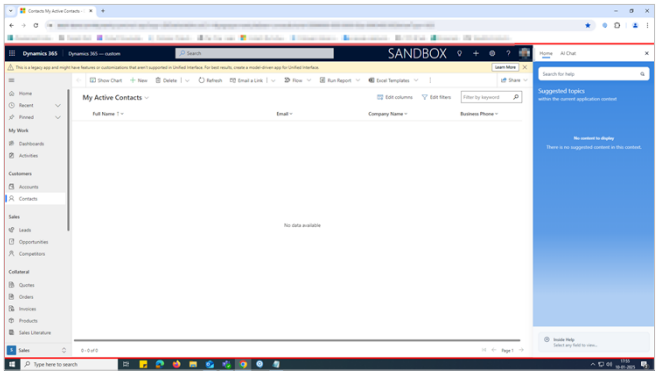
When you click on the UXP icon, a new pop-up will appear showing the URL of the currently published project.



Click on the group **UXP**.



The UXP appears next to the application.



4.4. Deploy UXP via Microsoft Intune

Deploy in-app guidance to every managed device automatically, so users get contextual help from day one without any per-device configuration.

4.4.1. Introduction

This guide explains how to deploy the ClickLearn UXP Extension to Windows devices using a PowerShell script through Microsoft Intune. Once set up, the extension installs automatically on all devices in your selected group no manual action needed from users.

4.4.2. Requirements

Check these before you start:

- Devices are enrolled in Microsoft Intune
- Users or devices are part of an Azure AD group
- You have admin access to the Intune portal
- You have tested the script on at least one device locally

4.4.3. Step 1: Download the Script

Download the PowerShell script here:
Deployment Script
Save it somewhere easy to find on your computer.

4.4.4. Step 2: Update the Script

Before uploading the script to Intune, you need to update two parameters. For that, first open the .ps1 file in Notepad or any text editor.

4.4.4.1. Content URL

$ContentUrlSchema = "https://your-content-url"

$ContentUrlSchema contains the ClickLearn Content URL that the extension will use. Replace the example value with your own Content URL and ensure the URL remains enclosed in quotation marks (").

The script includes the ClickLearn Product Documentation URL as a placeholder. Replace this URL with the Content URL for your own ClickLearn content URL.

Example:

$ContentUrlSchema =
"https://yourtenant.content.eu.clicklearn.com/publicco
ntent/YourContent.1033/YourContent.htm"

This URL is displayed in the extension and is used as the default content location for users. Depending on the **IsAllow** setting, users may either be able to view the URL only or edit it themselves.

4.4.4.2. User Permission (IsAllow)

$IsAllow = $false

The IsAllow setting determines whether users can manage the Content URL themselves.

4.4.4.2.1. False

When set to $false

$IsAllow = $false

Users are restricted to the Content URL configured by the administrator.

- The Content URL is displayed as read-only.
- Users cannot sign out of the extension.
- The Back link on the login page is disabled.
- A "**Managed by your administrator**" message is shown for restricted actions.

Use this setting when all users should access the same ClickLearn content and should not be able to switch to another environment.

4.4.4.2.2. True

When set to $true

$IsAllow = $true

Users have more control over the extension.

- Users can sign out of the extension.
- Users can change the Content URL from the login page.
- Users can switch between different ClickLearn environments configured for UXP.

Use this setting when users need access to multiple ClickLearn environments or during testing and validation activities.

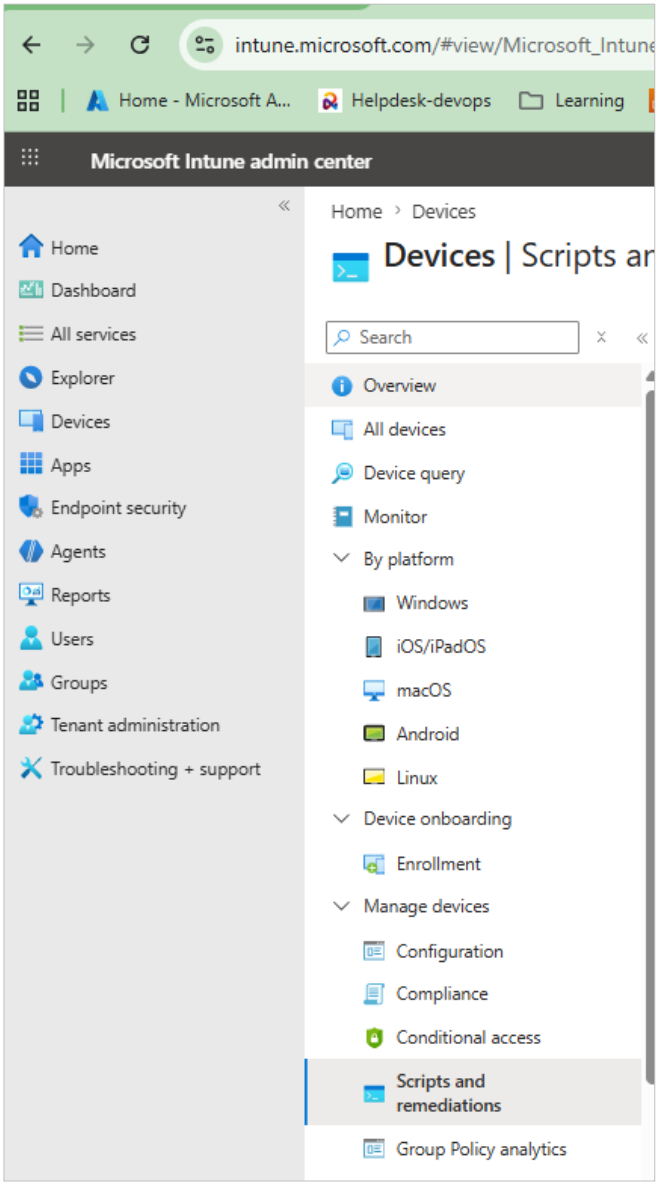
Important: Enter $true or $false exactly as shown, including the $ sign and without quotation marks.

4.4.5. Step 3: Sign In to Intune

- Open browser
- Go to: https://intune.microsoft.com and and sign in with your admin account.

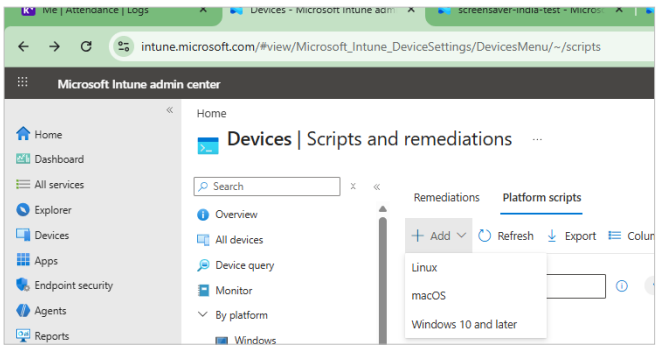
4.4.6. Step 4: Go to Platform Scripts

- Click Devices in the left menu
- Click Scripts and remediations
- Click Platform scripts



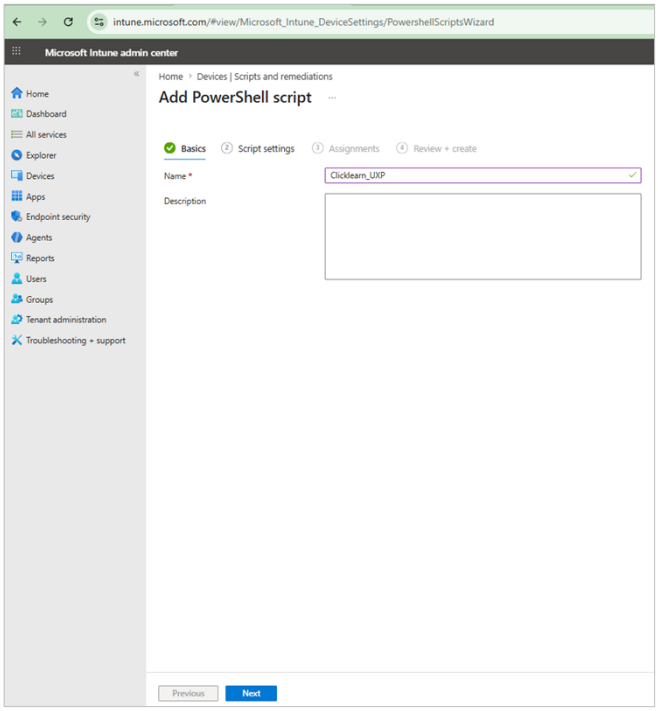
4.4.7. Step 5: Add a New Script

- Click + Add
- Select Windows 10 and later



4.4.8. Step 6: Fill In the Basic Details

- Name: ClickLearn_UXP
- Description: Optional - You can leave this blank or add a short note.
- Click Next.



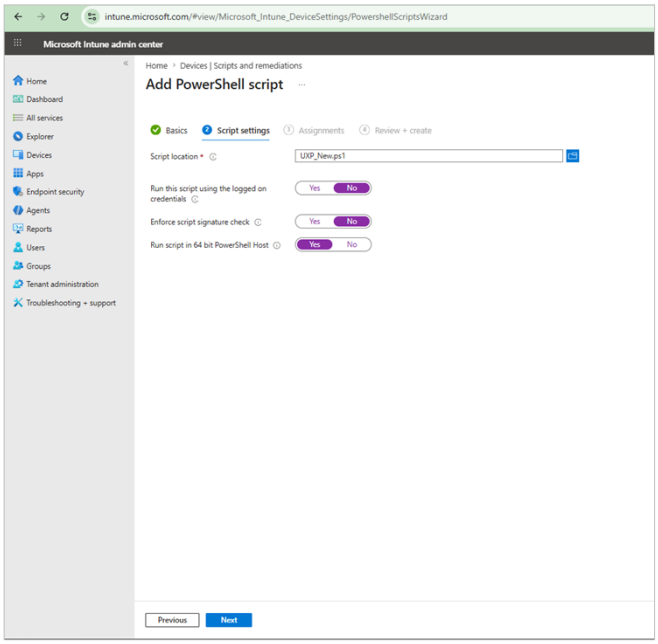
4.4.9. Step 7: Upload the Script and Set the Options

Upload the .ps1 file you updated in Step 2.

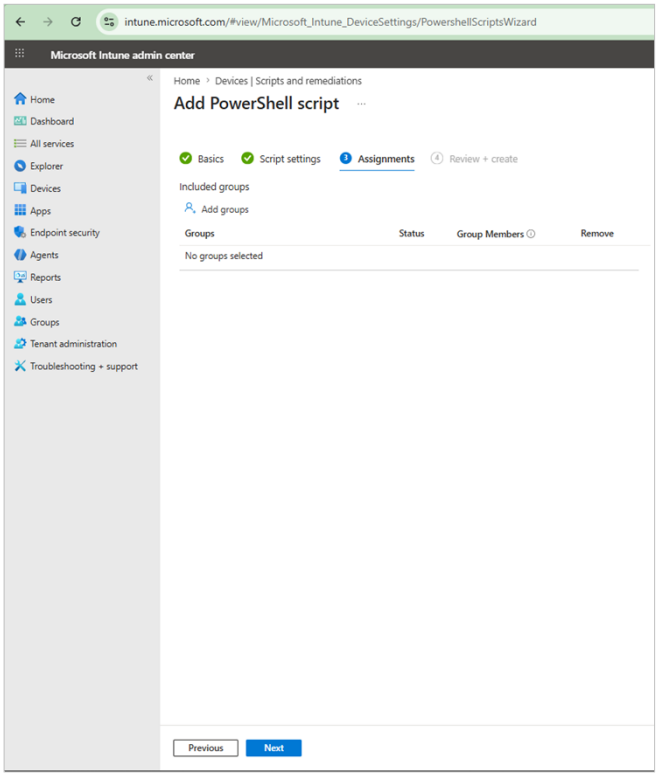
Set these options exactly as shown:

Setting	Value
Run this script using logged-on user credentials	No
Enforce script signature check	No
Run script in 64-bit PowerShell host	Yes

Click **Next**.



4.4.10. Step 8: Assign to a Group

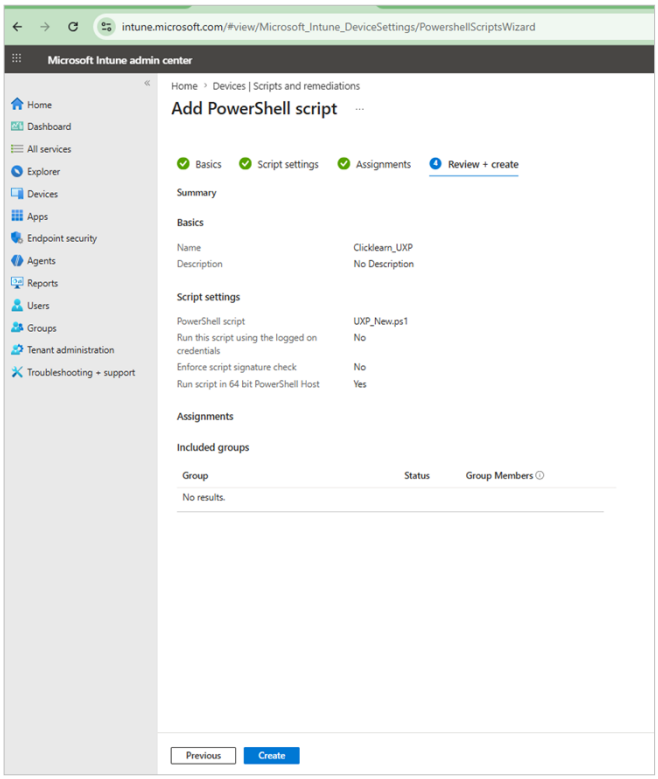


- Click Add groups

Choose your target group:
Use a User group if you want the extension to follow users across devices

- Use a Device group if you want it installed on specific machines regardless of who logs in
- Click Select, then click Next

4.4.11. Step 9: Create the Deployment



Review your settings and click Create.

Intune will start rolling out the script. It can take up to 8 hours for all devices to receive it, depending on when they check in.

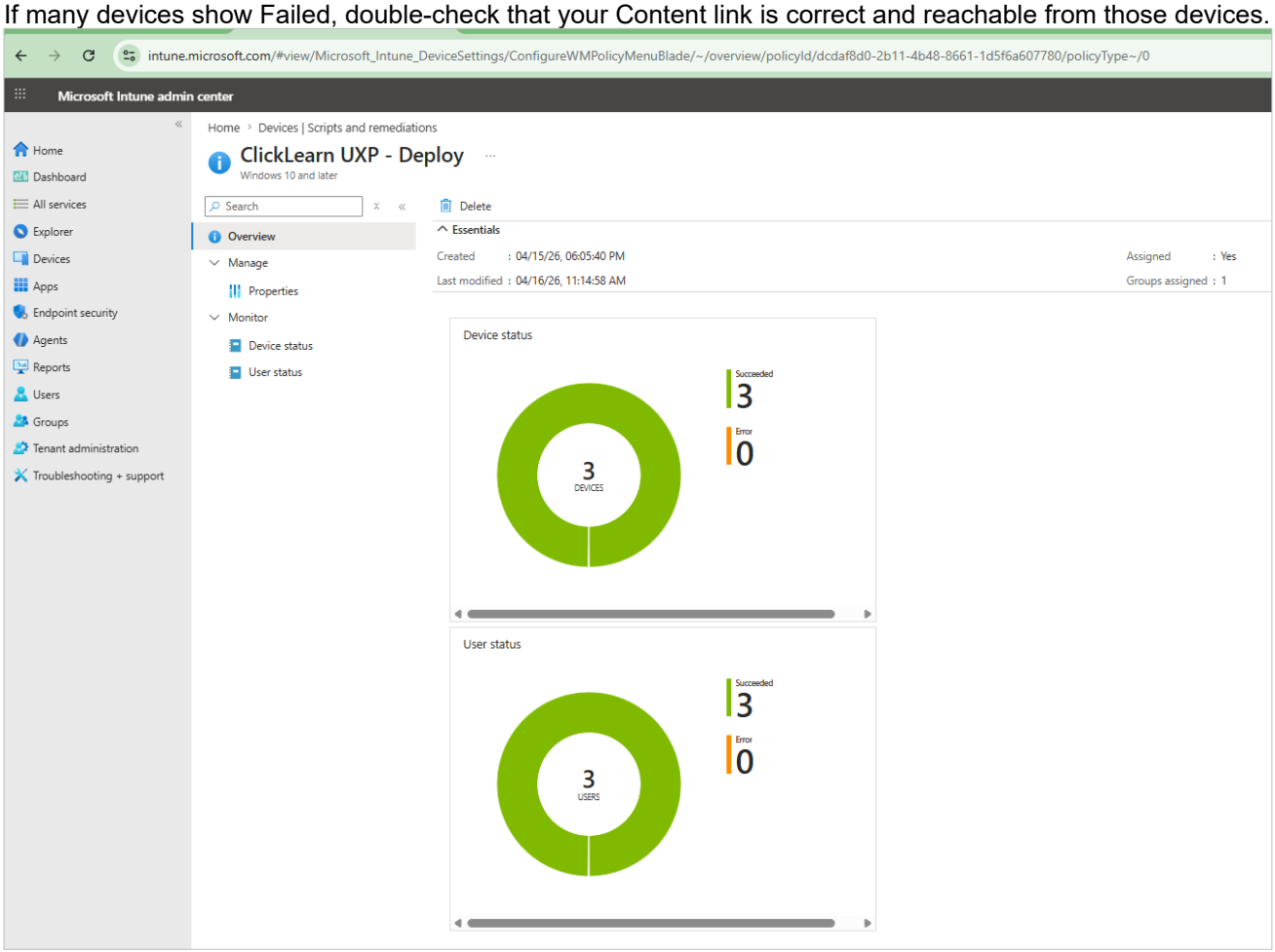
4.4.12. Step 10: Check Deployment Status

To see how the rollout is going:
Open the script from Platform scripts
Check the Device status or User status tab

Status	What It Means

Succeeded	Script ran and extension is installed
Failed	Something went wrong - check device logs
Pending	Device hasn't checked in with Intune yet

If many devices show Failed, double-check that your Content link is correct and reachable from those devices.

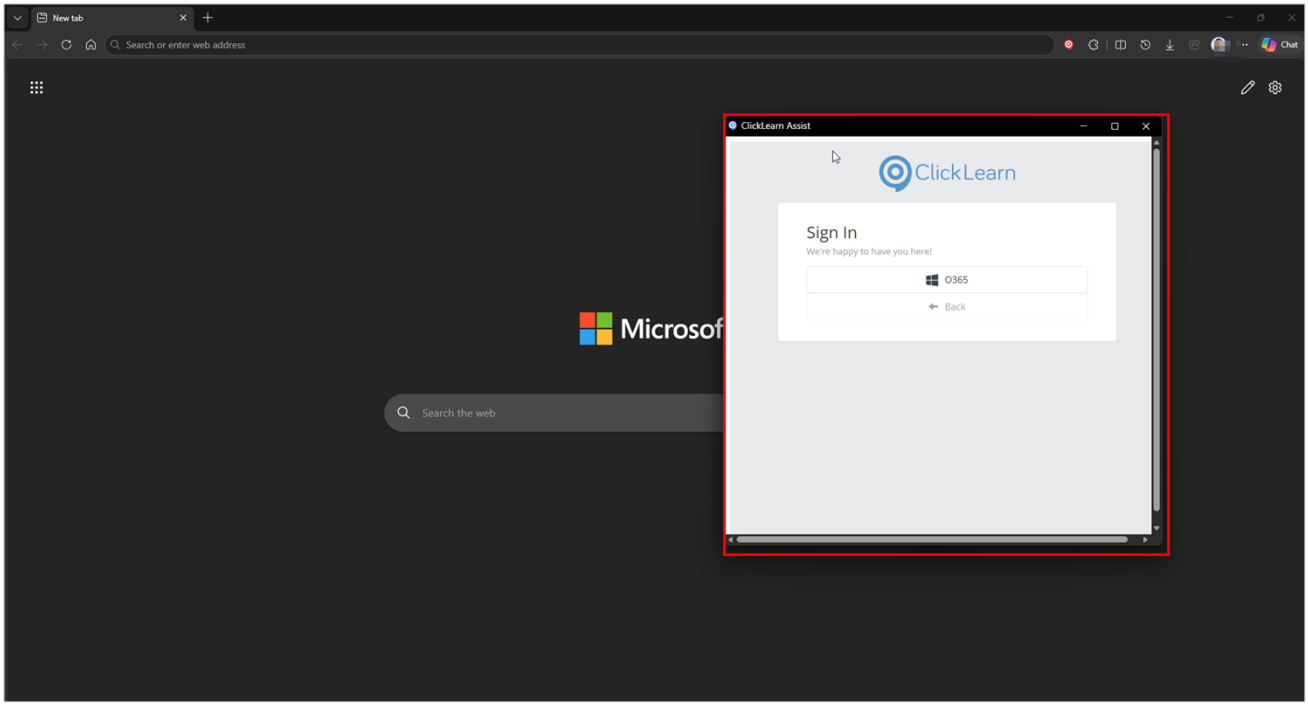


1. **In Intune**: open the script and check Device status. The test device should show Success.
2. **On the device**: open **C:\ProgramData\ClickLearnUXP\Deploy-ClickLearnUXP.log**. The VERIFICATION block at the end should show the forcelist entries, your Content URL and your IsAllow value.
3. **In the browser**: go to chrome://policy or edge://policy, then select Reload policies. **ExtensionInstallForcelist**, ContentUrlSchema and IsAllow should show status OK. Also note ContentUrlSchema and IsAllow wont be displayed in edge policy it will appear only on chrome policy list.

4.4.13. Step 11: Post Deployment

Once the script has been deployed through Intune and executed on user devices, Chrome and Edge will automatically restart so that the new policy settings can be applied.

- For **public content**, users can simply navigate to their business system URL and the ClickLearn UXP icon should be available automatically.
- For **private content**, users will first see the ClickLearn login page based on the configured Content URL. Users should sign in to ClickLearn before accessing their business system. After signing in, navigating to the business system URL will display the ClickLearn UXP and enable access to the configured content.



4.4.14. Updating the content URL or IsAllow

Edit **$ContentUrlSchema** or **$IsAllow** in your copy of the script. Then, in Intune, open the same platform script, go to Properties > Script settings > Edit and upload the updated file. Intune only runs a script again on a device when the script content changes, so uploading the edited file makes it run once more.

If the Content URL changes, the extension signs out users who are already signed in, so they pick up the new URL.

4.4.15. Uninstall UXP

Download the PowerShell script here:
Uninstall Script
Follow the same deployment process as above to rollback.

4.5. Deploy UXP via GPO

Enable in-app guidance for all end-users.

4.5.1. 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

Follow the below mentioned steps for installing it as a group policy:

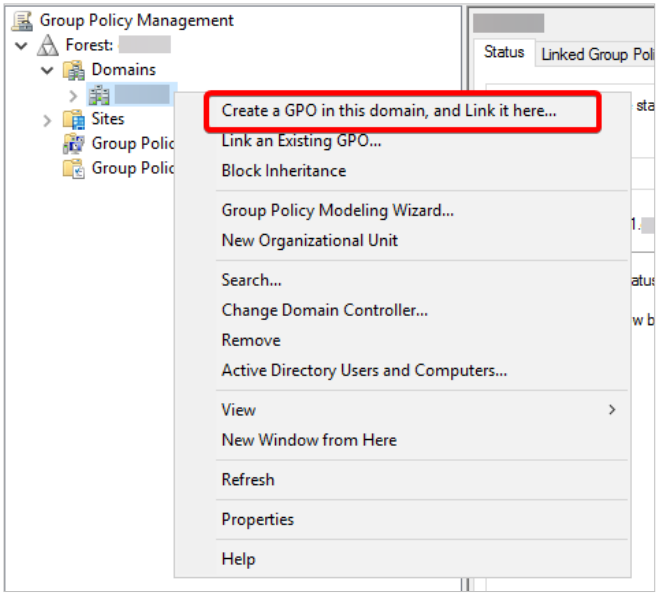
Edit the .bat file in a text editor of your choice (for example, Notepad or Visual Studio Code). Then update it as follows:

1. Locate the line where you need to put your content URL.

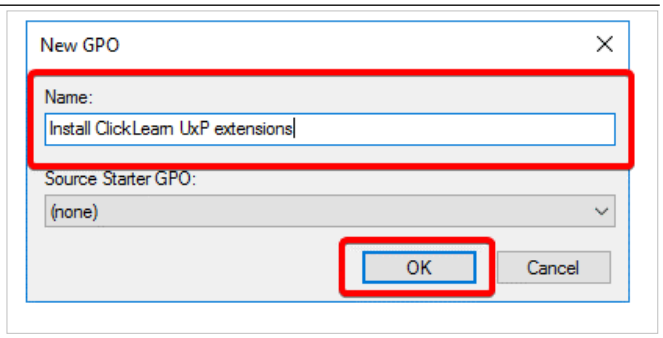
2. Copy the content URL from the studio and add it to the line located make sure its decoded ie it should not contain "**%20**".

3. Save the file
Refer to screenshot for an example of how the edited file should look. In the screenshot, the URL points to producut documentation; in your case, use your own content URL.

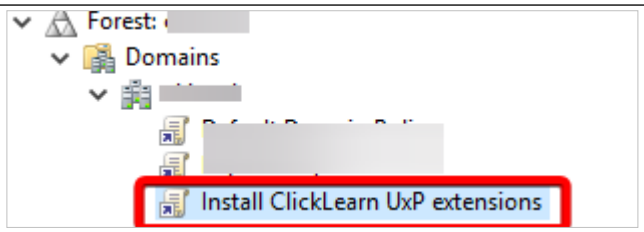
Go to the active directory server. Open the "**Group Policy Management**." Right-click on your domain directory. Click "**Create a GPO in this domain, and Link it here**."



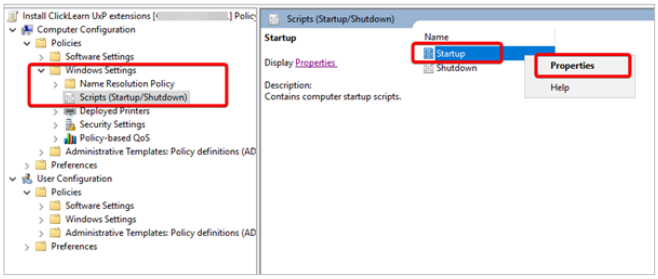
Later, a pop-up appears wherein you must fill in the value as per the given name, "**Install ClickLearn UxP extensions**." Click on the **OK** button.



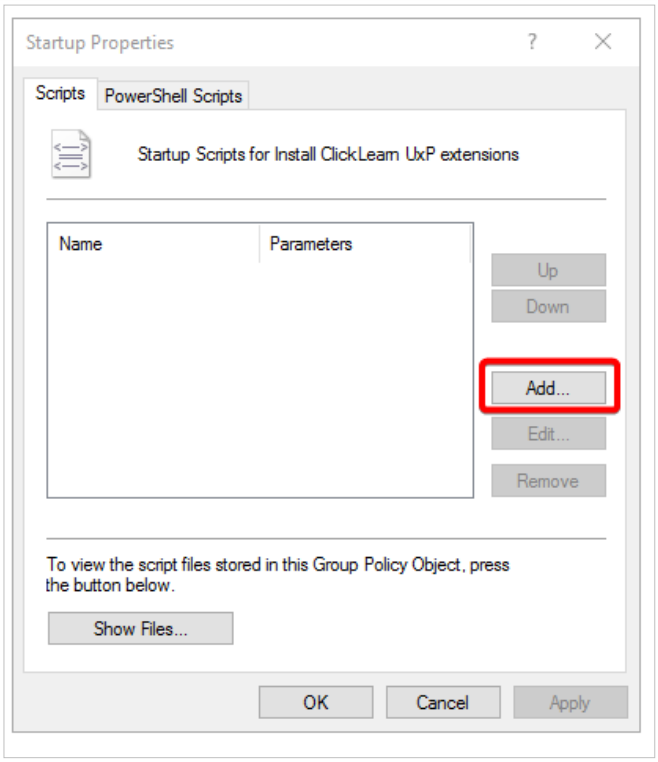
Once you click the OK button, the screen looks something like this.



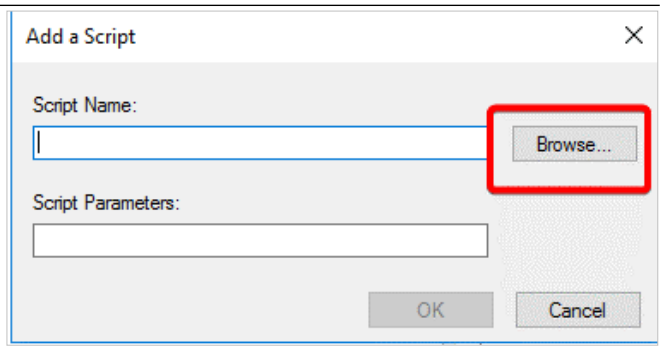
Expand Windows Settings, right-click on the policy, and click Edit. The screen looks something like this.



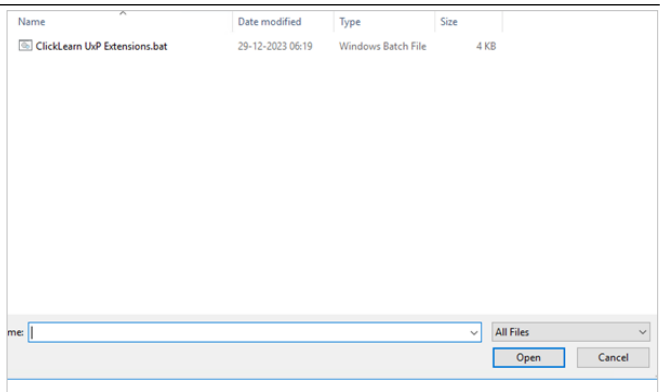
Click on the button **Add**.



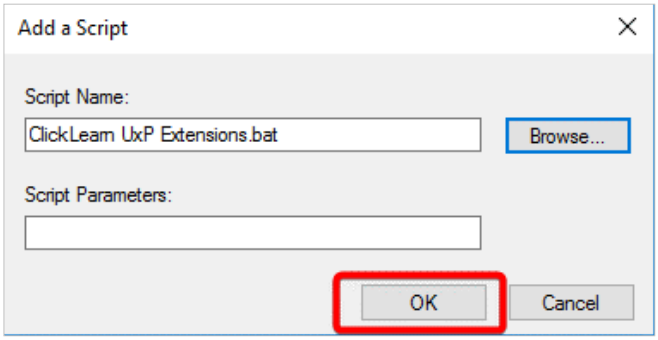
Click on the button **Browse**.



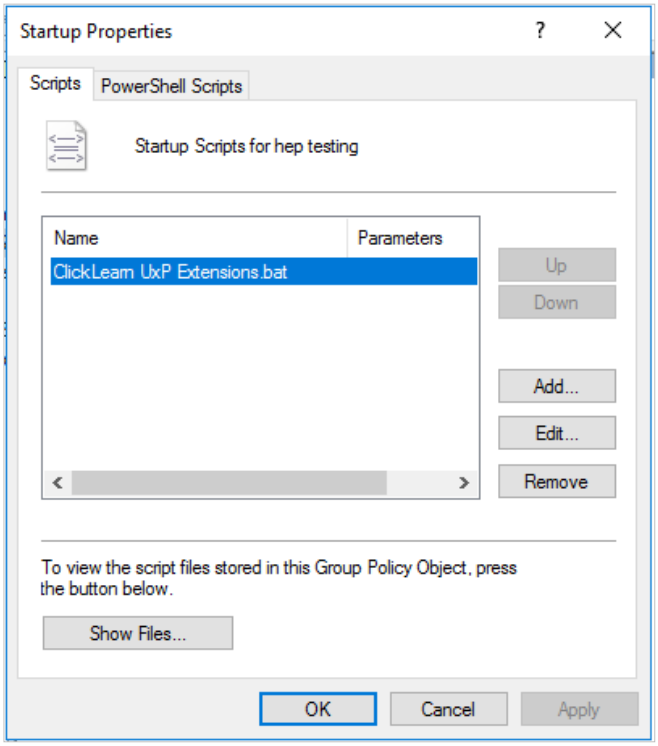
Copy the file you downloaded in the first step and paste it into the folder you opened from the browse option. Choose the file and open it.



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.

4.6. BC On-premise assist Installation Guide

Enable ClickLearn Assist in a Business Central on-premise environment, so users get step-by-step guidance directly inside BC without a cloud dependency.

4.6.1. Introduction

NOTE: To complete the steps in this guide, you will need to the ClickLearnHelp.app app and Control Add-in files.

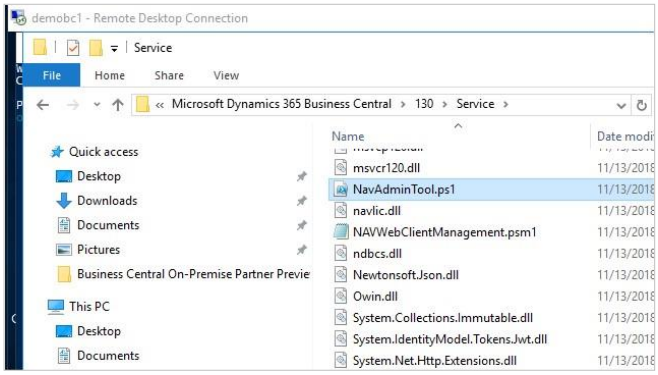
4.6.1.1. Install extension

Download the latest release of the ClickLearn Business Central extension package here. The package contains one BC extension file with the ".app" filename extension, and two files with the ".zip" filename extension

Download the add-ins here:

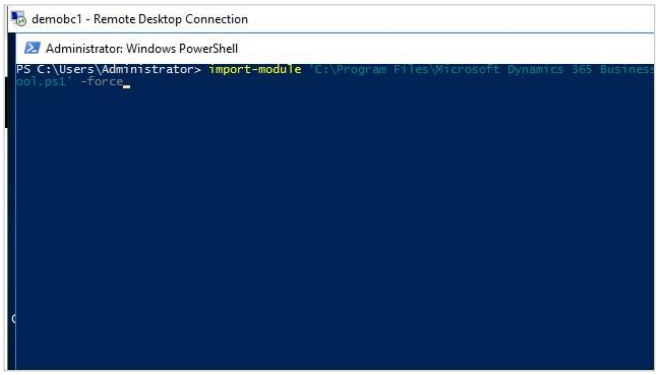
1. ClickLearn_ButtonControl.zip.
2. ClickLearn_IFrameControl.zip.

Access your BC server. Locate NavAdminTool.ps1 in Program Files -> [Business Central folder] -> [Version] -> Service -> NavAdminTool.ps1



Open PowerShell and type:
"Import-Module
'C:/Program Files/[Business Central folder]/[Version]/Service/NavAdminTool.ps1' -force"

NOTE: If a previous version of the app has been published and/or installed, make sure to uninstall and unpublish the app before publishing the new app.



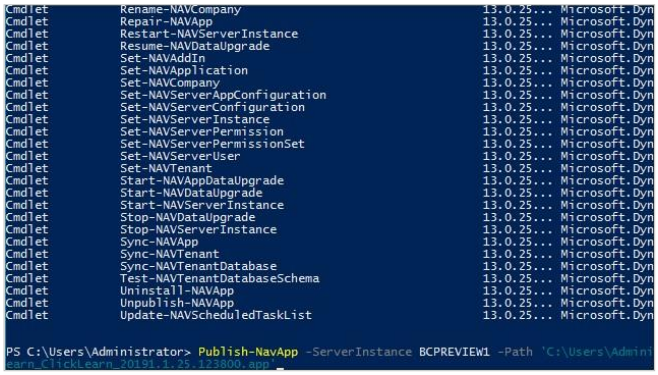
- **To uninstall**:

Uninstall-NavApp -ServerInstance [Server Instance] - Name ClickLearn -Publisher ClickLearn -Version [Version number]

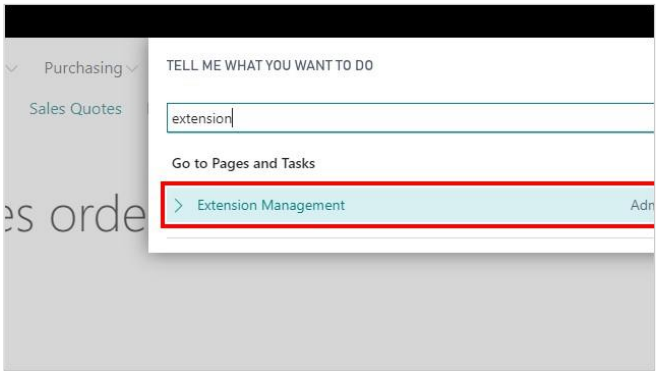
- **To unpublish**:

Unpublish-NavApp - ServerInstance [Server Instance] -Name ClickLearn - Publisher ClickLearn -Version [Version number]

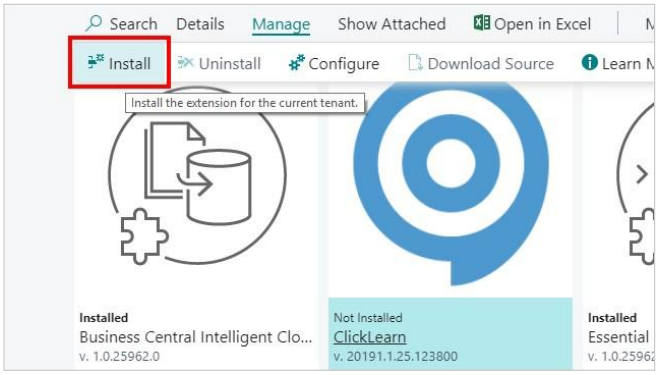
Type:
"Publish-NavApp -ServerInstance [Server Instance] -Path '[path to ClickLearnHelp.app]'
and wait for the publishing to finish.



Open the BC Web Client in your browser and go to Extension Management Administration.



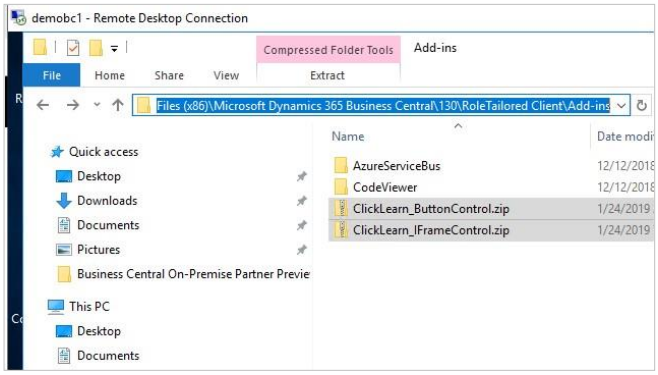
Select ClickLearn extension, and click Manage and Install to install the extension



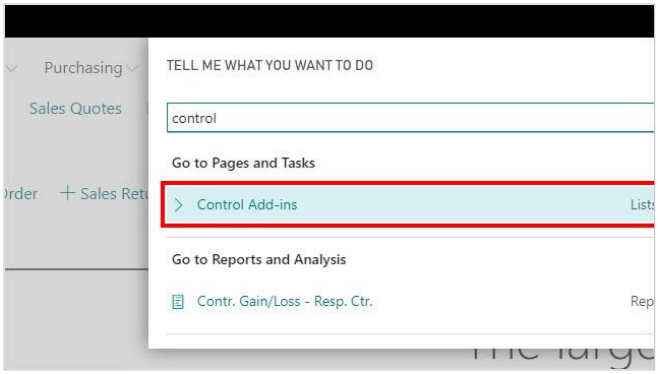
4.6.1.2. Install control add-ins

On your BC server, locate the two control add-in zip files from the package and move them to:
C:\Program Files (x86)\Microsoft Dynamics 365 Business Central\130\RoleTailored Client\Add-ins

NOTE:
If your Business Central version is 240 and above then use the below path:
C:\Program Files\Microsoft Dynamics 365 Business Central\240\Service\Add-ins



In BC web client, open “Control Add-Ins”



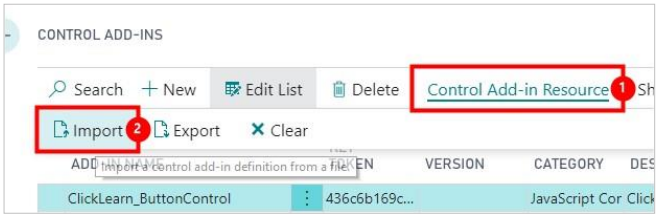
Perform the following steps for both control add-ins:

1. Click "New" to add a new row
2. Enter the filename, excluding the filename extension, in the Add-In Name column.
3. Use "436c6b169c34da13" in column Public Key Token (same for both add-ins)
4. Enter a description, e.g. "ClickLearn Button" or "ClickLearn iFrame"

Perform the following steps for both control add-ins:

Select a row with one of the add-ins and click on the navigation menu item popup Control **Add-in Resource**
Click on the navigation menu item Import

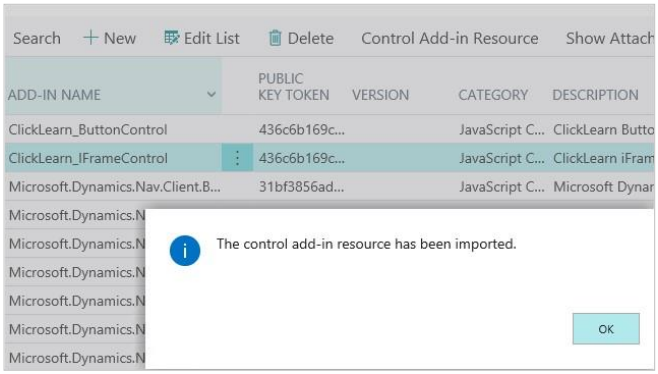
1. **Locate and select the zip file** that matches the control you chose to import, in “C:\Program
2. Files (x86)\Microsoft Dynamics 365 Business Central\130\RoleTailored Client\Add-ins” OR **C:\Program**



Files\Microsoft Dynamics 365 Business Central\240\Service\Add-ins

When completed for both control add-ins, reload the Business Central session in your browser.

NOTE: If the ClickLearnHelp icon does not immediately appear, please scroll down to the bottom of the page and wait for the icon to appear



5. Projects

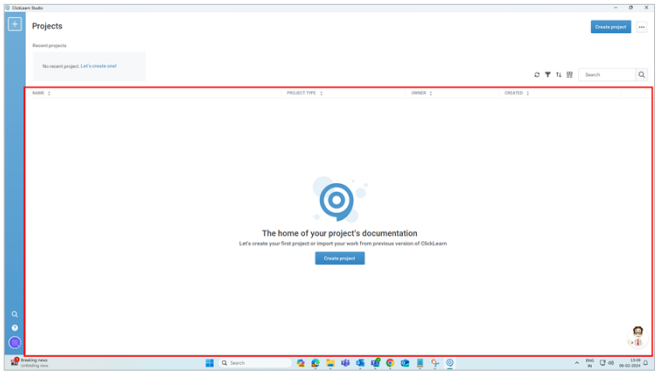
5.1. Navigate the Project Space

5.1.1. Navigate the Project Space

Get oriented quickly in the project space, whether you're a new user starting fresh or an existing user returning to your projects and work.

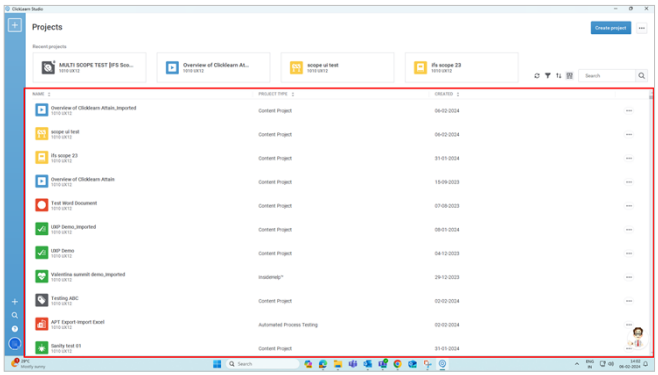
5.1.1.1. Project Space of a New User

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



5.1.1.2. Project Space of an Existing User

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



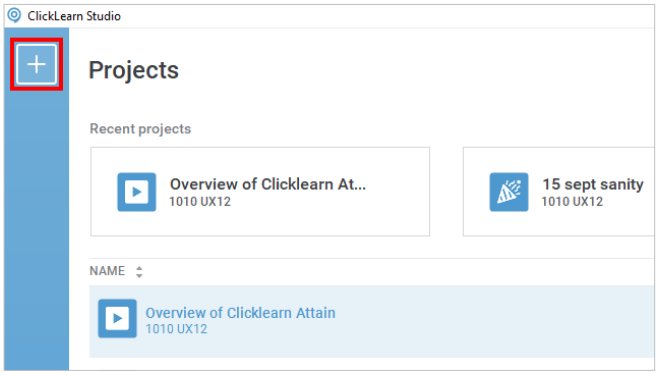
5.1.2. Project Space

Create new ClickLearn Attain projects and organize recordings and learning materials in folders, with

recent projects always within reach for faster access.

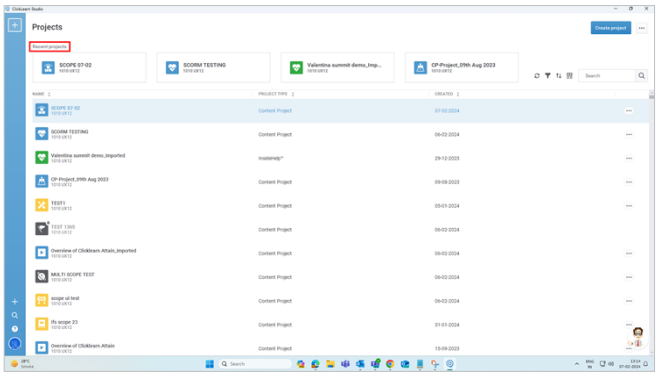
5.1.2.1. Create new project

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.
To create a new project, click on the button **New Project**.

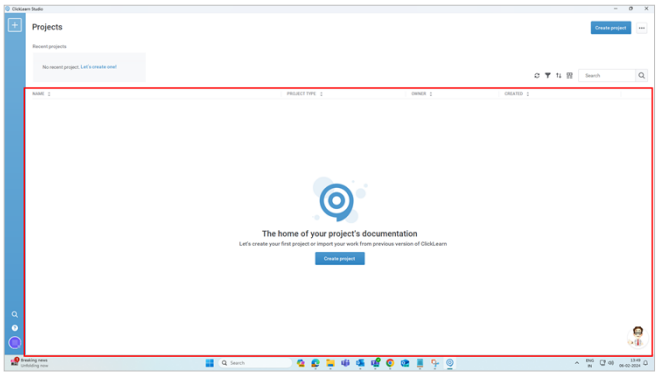


5.1.2.2. Recent Projects

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.

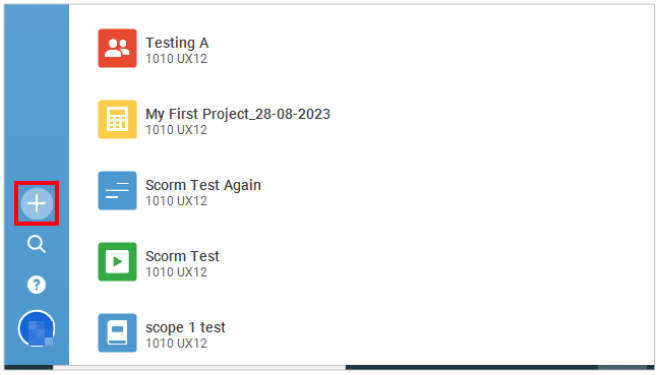


5.1.3. Left side menu

Create and find projects from the left side menu, with quick access to help resources, account settings, updates, licensing, and administrative tools.

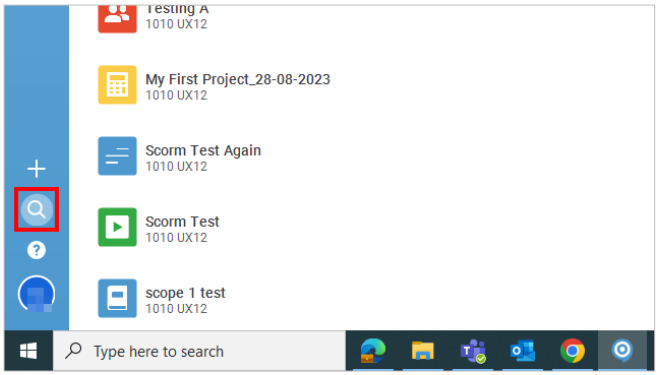
5.1.3.1. Create a new Project

The **New Project** button is another option for creating a new project.



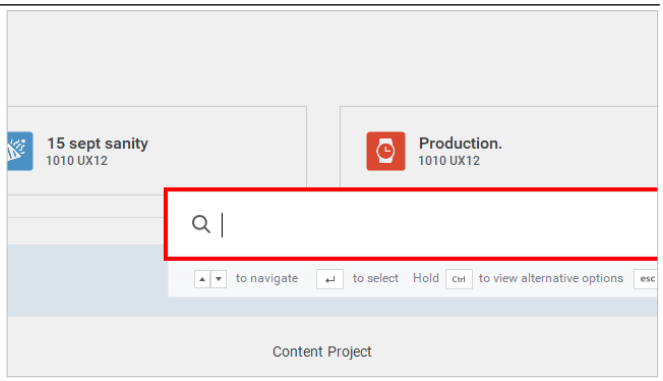
5.1.3.1.1. Search

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



Click on the textbox **Search.**

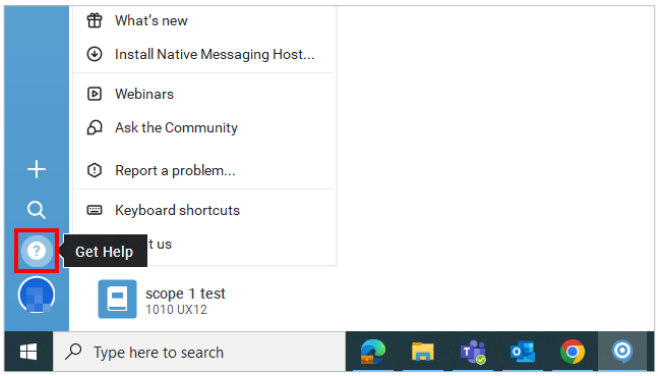
Enter the project name you wish to search.



5.1.3.1.2. Get Help

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

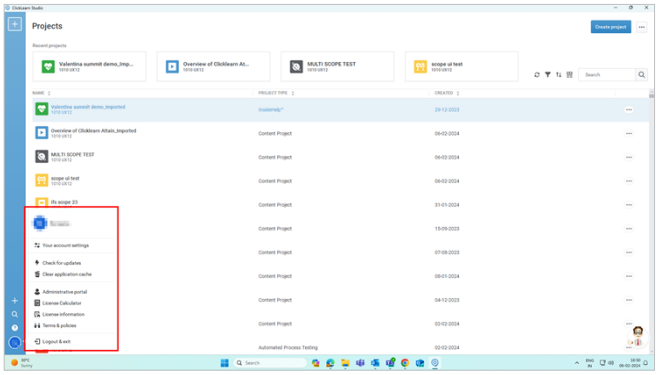
- What's New
- Install Native Messaging Host
- Webinars
- Ask the Community
- Report a problem
- Keyboard Shortcuts
- About us



5.1.3.1.3. 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



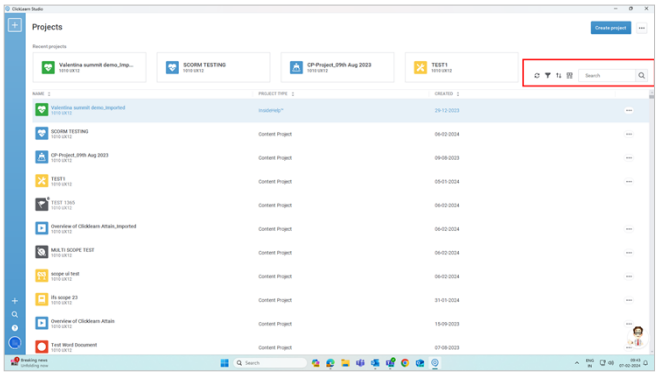
5.1.4. Other basic menu items

Find and organize content faster with refresh, filter, sort, search, and column chooser tools that let you tailor every list view to your project needs.

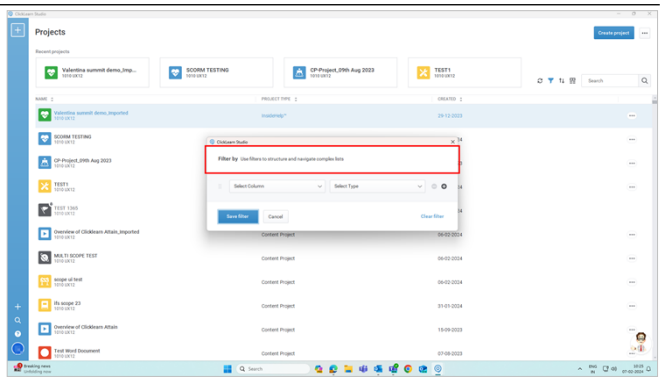
5.1.4.1. Other Basic Elements

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

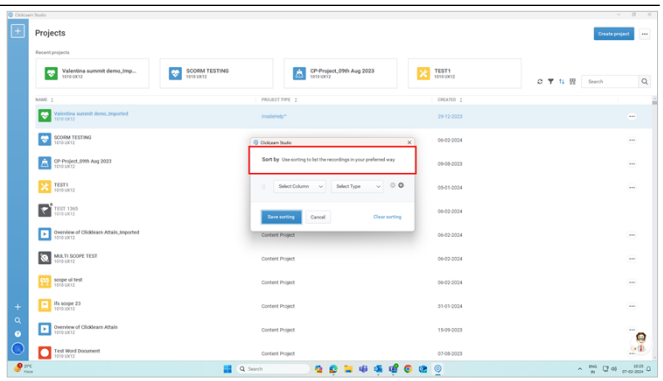
Refresh: Refresh reloads or updates what is displayed or stored on a device.



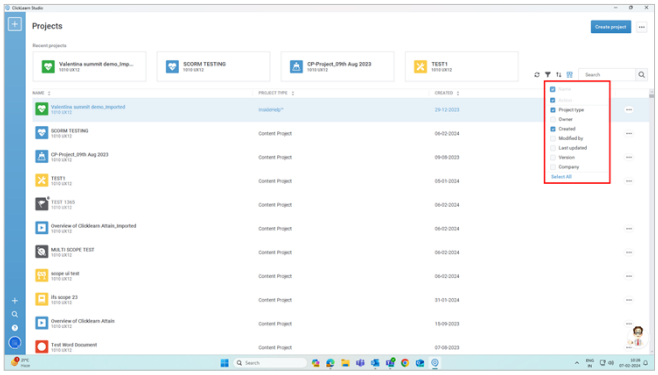
Filter: By selecting the column and type from the list, you can use this feature to structure and navigate through complex lists easily. You can also specify your search criteria to suit your needs.



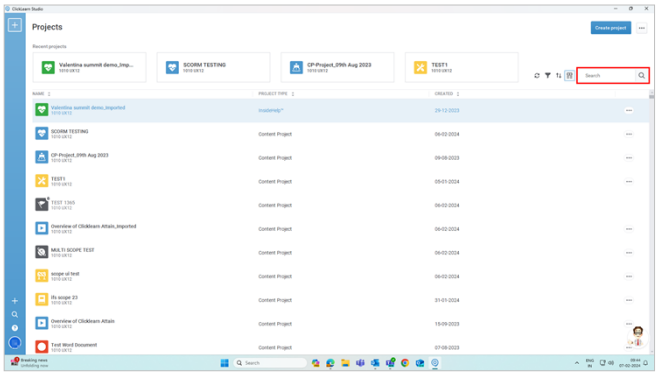
Sort: This feature can arrange the recordings to best suit your project needs. You can also choose your criteria to sort the recordings according to your preferences.



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.



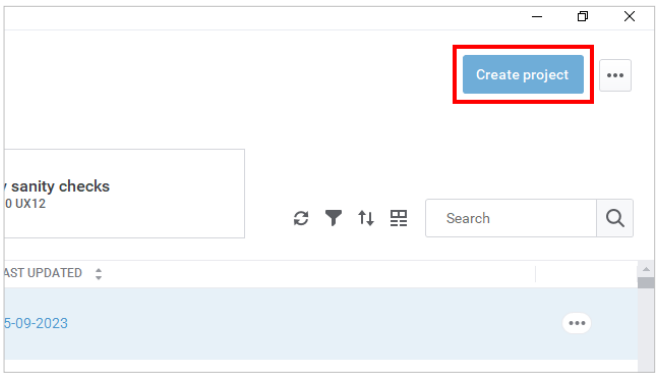
5.1.5. Components at top right corner

Start new projects or import existing ones from your local system in a few clicks, right from the top right corner of the project space.

5.1.5.1. Other Components at the top right corner

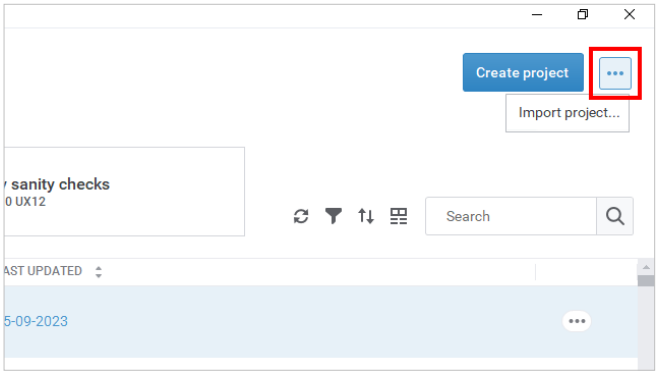
5.1.5.1.1. Create Project

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



5.1.5.1.2. 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.



5.2. Create a new Project

Find your way around the project workspace from day one, so you spend time creating content, not looking for where things are.

5.2.1. 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.

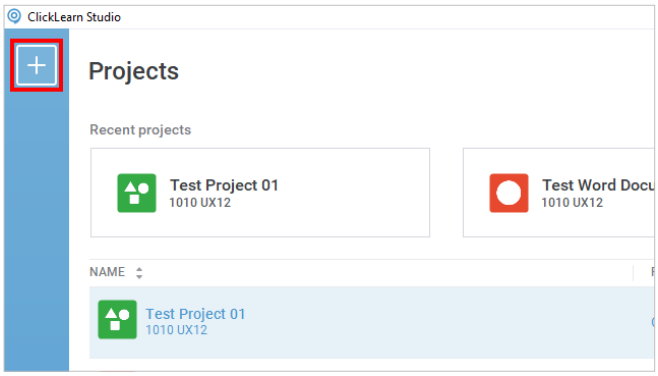
5.2.2. Getting Started

5.2.2.1. Create a new project.

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

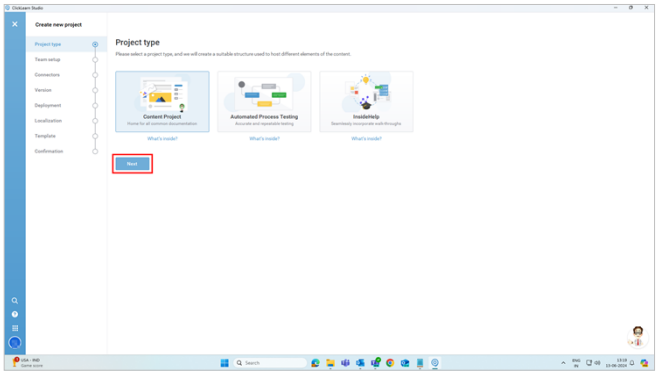
This section will explore the distinct kinds of projects that ClickLearn Attain offers.

You can select the project type that aligns with your requirements.



5.2.2.2. 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**.



5.2.2.3. 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.

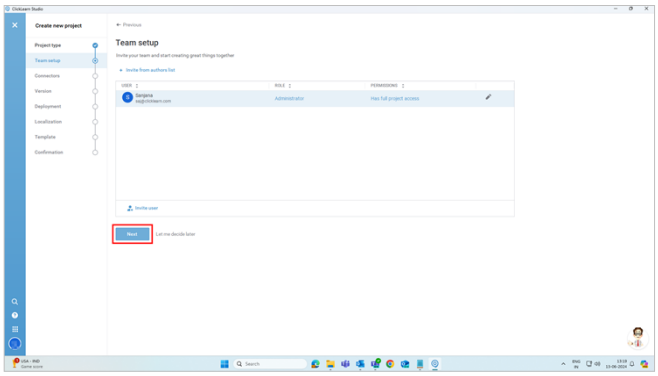
Invite user: This option invites a user who is not a part of ClickLearn Attain. To invite a new user, you must enter their email address, full name, and assigned roles.

Role of the user:

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

After adding a user to your project, you can change their role and permissions by clicking the pencil icon next to the permission.

Click on the button **Next**.

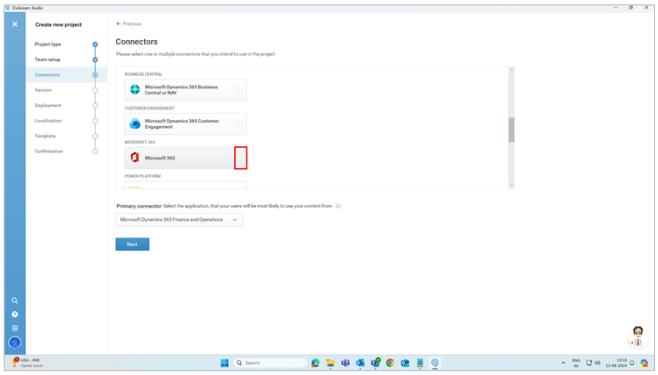


5.2.2.4. Connectors

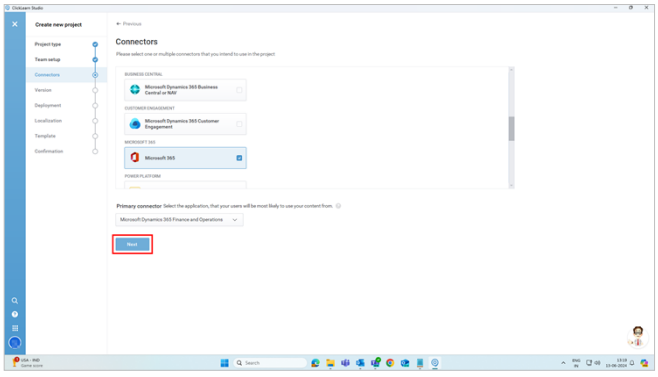
A connector is a tool that enables ClickLearn Attain to follow your actions in different applications and capture them as steps in your learning materials.

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

Click on the checkbox.



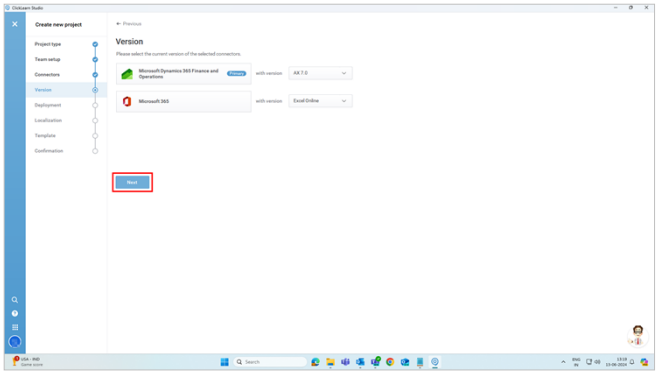
Click on the button **Next**.



5.2.2.5. Version

You can choose the version of the selected connector.

Click on the button **Next**.



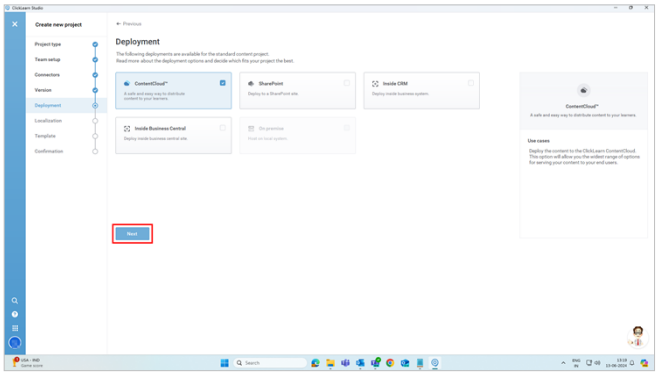
5.2.2.6. Deployment

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 the available deployment options, such as:

- Content Cloud
- SharePoint
- Inside CRM
- Inside Business Central
- On premise

Click on the button **Next**.



5.2.2.7. Localization

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

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

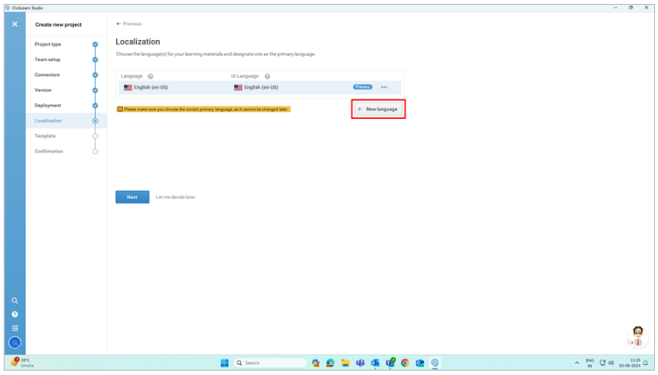
The first language you select will be your primary language; the next is secondary, and so on.

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.

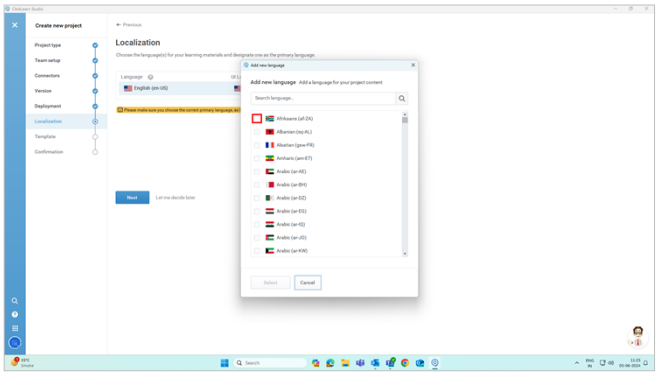
Delete: This option lets you remove a specific language from your project.

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

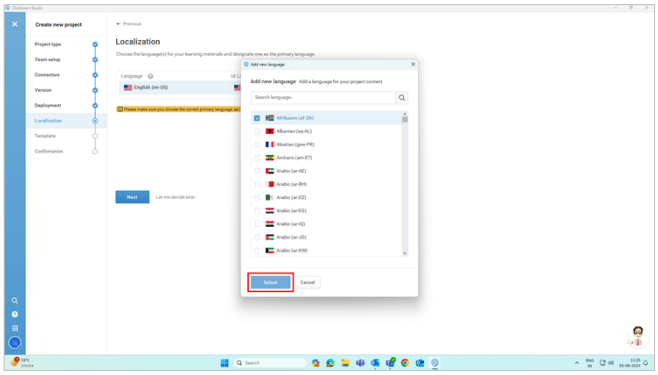
Click on the button **New language**, which helps you add the languages you want your project to use.



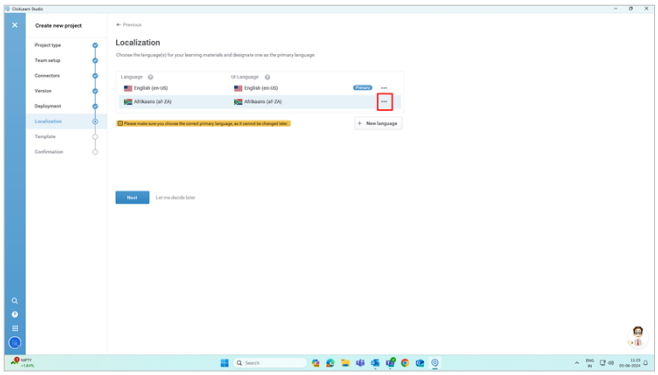
Click on the checkbox for the tree node **Afrikaans (af-ZA)**.



Click on the button **Select**.

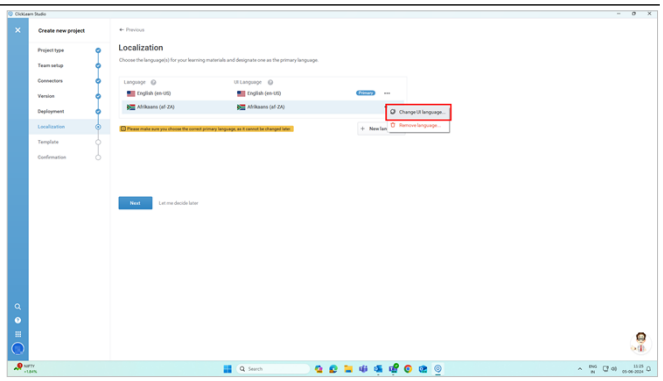


Click on the grid cell **Action**.

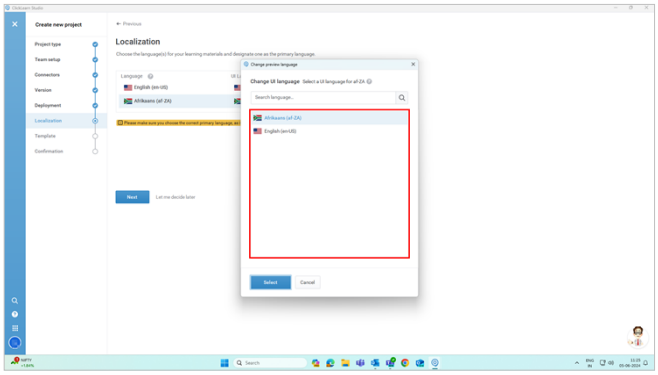


You can also change the UI language depending on the language you choose for your project.

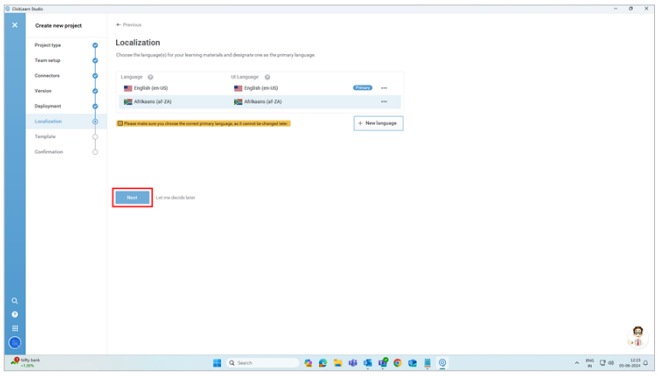
Click on the menu item: **Change UI language**.



You can select your preferred UI language based on your project requirements.



Click on the button **Next**.

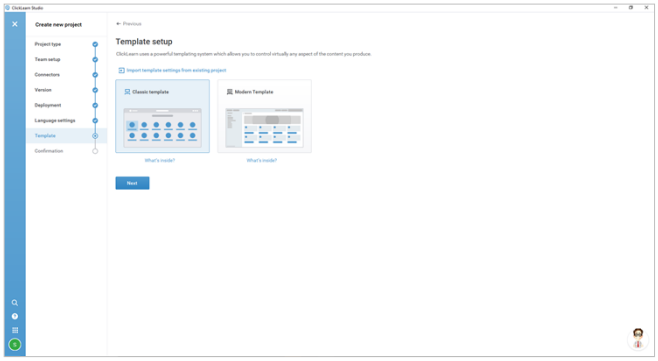


5.2.2.8. Template

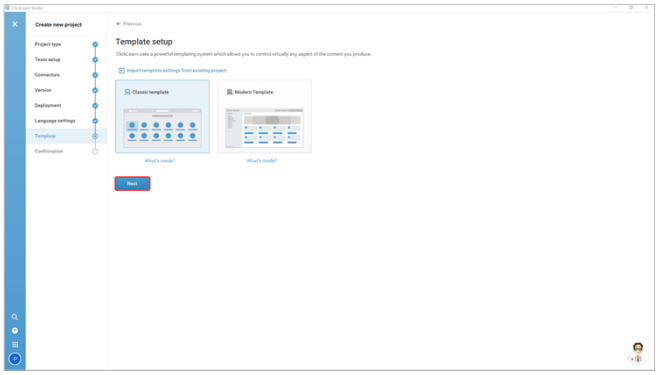
You can control any aspect of the content you produce.

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.

You can choose from the *Classic or Modern template* depending on your preference.



Click on the button **Next**.

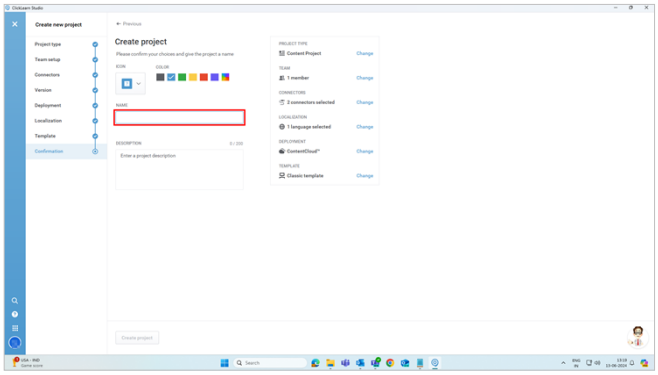


5.2.2.9. Confirmation

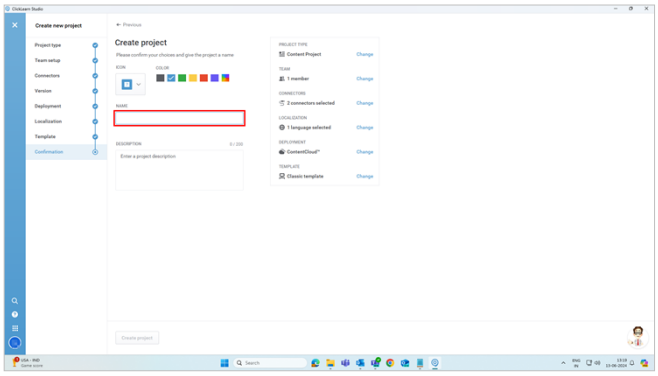
While creating a new project, you can also select an icon and color.

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

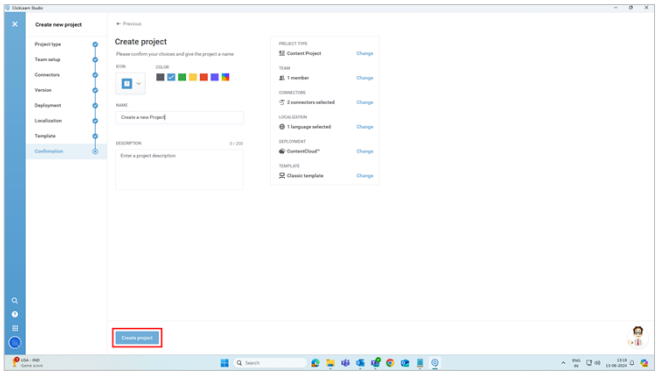
Click on the textbox **Project Name**.



Enter **Project Name**.



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



5.3. Choose the Right Project Type

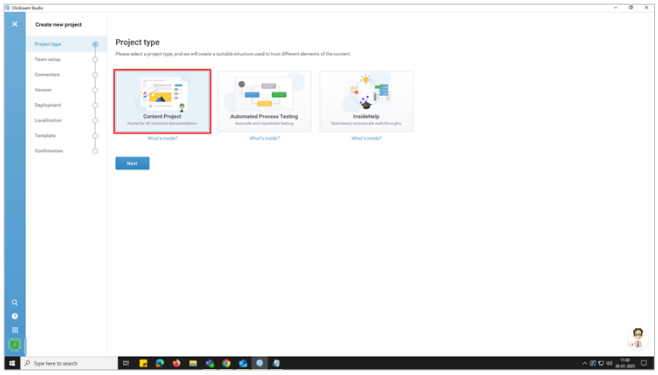
Set up a project correctly from the start as the choices you make at creation (type, connectors, deployment, localization) determine what you can produce and how easily content can be updated later.

5.3.1. Introduction

Click Learn Attain provides you with options to create three different types of projects and customize these according to your preferences and requirements. Let us have a look at various types of projects available in ClickLearn Attain.

5.3.1.1. Content Project

A Content Project is the most common project with which you probably would want to begin working in ClickLearn Studio. Select the Content Project type if you need to create and edit recordings. This project type also enables you to deploy recordings and create your learning portal.

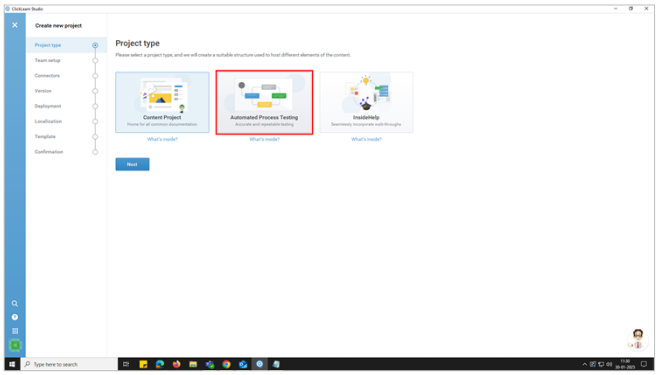


These projects are customizable as per your requirements, help to segregate data efficiently, and help you collaborate better with your team members who are working simultaneously on the project.

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

5.3.1.2. Automated Process Testing

Automated Process Testing (APT) project type helps you create automated process units. Create repeatable testing content for all your business testing and repeatable tasks. Record content from your business-systems that require repeatable testing or has repeatable tasks that can be added in test, which flows through a process flow with conditions of your choice.



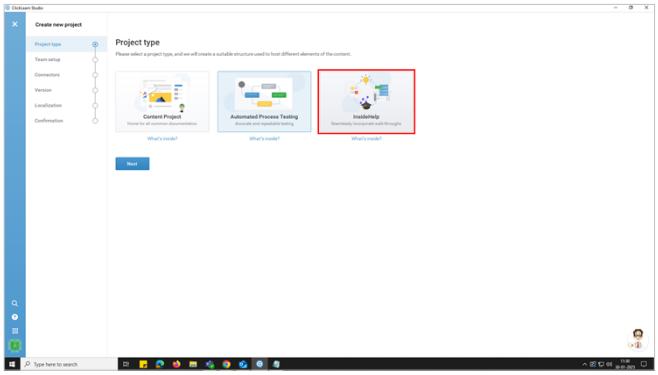
The testing units help you identify whether the flow is working fine after you have modified some diagram or data in the application. It provides you with a dashboard data that helps you make informed decisions.

The APT project is a very advanced functionality and will require in-depth knowledge of both ClickLearn Attain and your own business system.

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

5.3.1.3. InsideHelp

The InsideHelp project type helps you create and deploy context specific help for business processes in your application. You can deploy the recordings that are already available in ClickLearn Attain and integrate it with your CRM, NAV or BC solution.



Record your content from your business-systems, target and structure your content, and deploy to the Help menu alongside the inbuilt help. InsideHelp enables you to contextualize the fields based on your own words. Live assist could be configured and works seamlessly with your business system.

5.4. Understand and Use Project Templates

Apply consistent structure and branding across all recordings in a project without repeating configuration for each one.

5.4.1. Introduction

The Project Template is designed to streamline and enhance your learning content creation process. This template provides a powerful foundation for creating consistent, high-quality content that meets your specific needs, ensuring both flexibility and ease of use.

The Project Template serves as a starting point for building and customizing your content. It’s structured to make sure your materials are well-organized and visually appealing, regardless of the device your learners are using.

5.4.1.1. Features

5.4.1.1.1. Keeps Your Content Consistent and Structured

The Project Template ensures your learning materials follow a clean, professional layout from start to finish. No matter how much you add - text, images, or videos; everything stays organized and consistent.

5.4.1.1.2. Automatically Adjusts for Any Device

The learner uses different devices to access the content. That's why Project Template automatically adapts to any screen size and gives an optimal viewing experience on desktops, tablets, or smartphones.

5.4.1.1.3. Gives You the Flexibility to Customize

The Project Template can be customized according to your requirements. You can tweak colors and layouts and even add your own logos or visual elements to match your company's brand. This will make your content personalized and unique to your audience.

5.4.1.1.4. Enhanced User Engagement

You can easily incorporate your company’s visual elements, such as logos and custom icons, or select from a library of ready-made options. This flexibility helps create a personalized learning experience that resonates with your audience.

5.4.1.1.5. Easy to Get Started

The Project Template allows you to quickly start building your content without worrying about the technical aspects of design. This allows you to focus on delivering value to your learners.

5.4.1.1.6. Saves Time

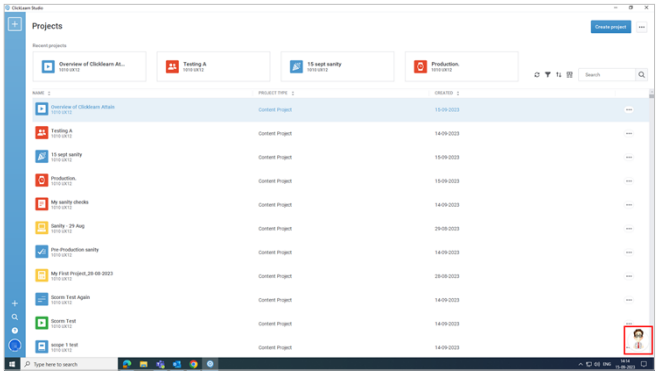
With a pre-designed structure, the template saves time on formatting and layout, allowing you to focus on the content's substance.

5.5. ClickLearn Assist

Enable ClickLearn Assist for quick in-app help when working on your documentation.

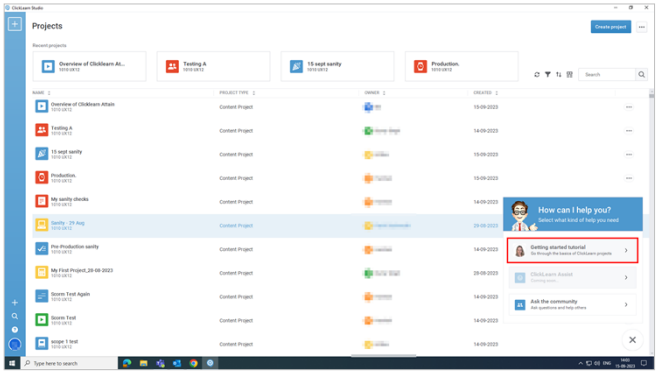
5.5.1. ClickLearn Assist

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

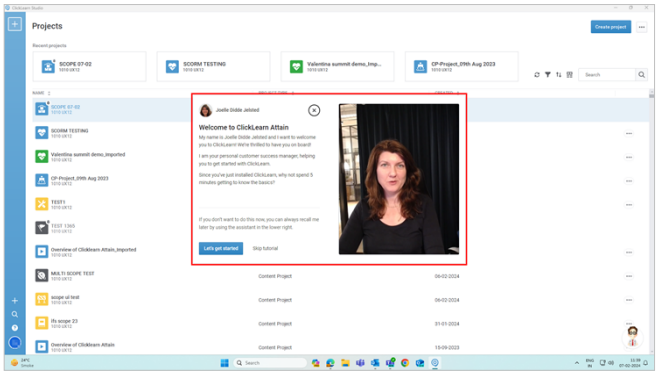


Click on the list view item **Getting started tutorial**.

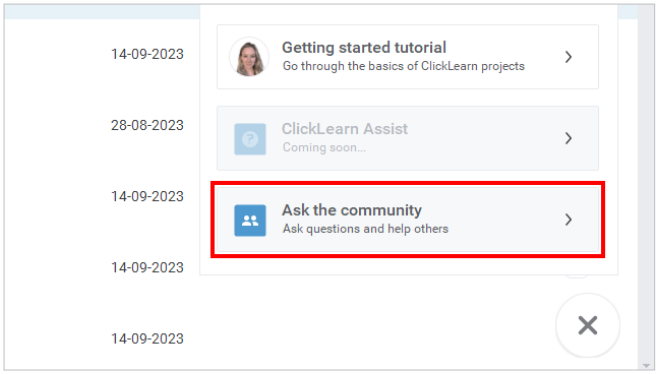
The second feature, ClickLearn Assist, is coming soon.



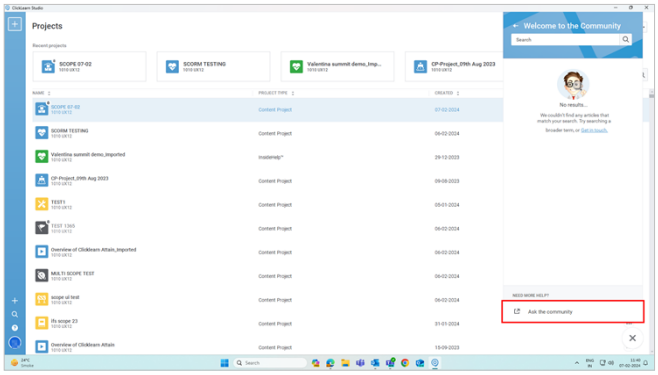
When you click on the Getting Started Tutorial, it will start with a video tutorial that will guide you on creating a project, and so on.



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.



5.6. Duplicate a Project

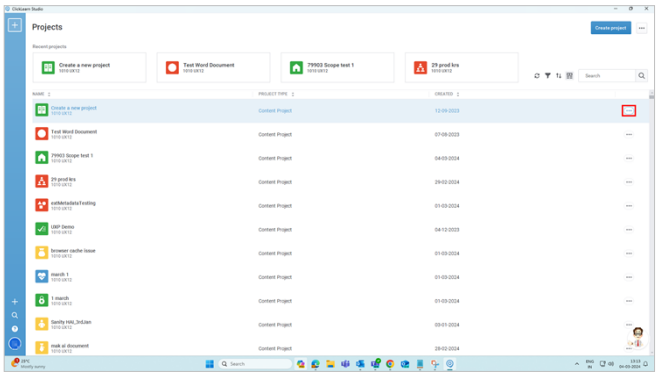
Reuse an existing project's structure and settings as the starting point for a new one, cutting setup time when the new project targets a similar process or audience.

5.6.1. Save As Project

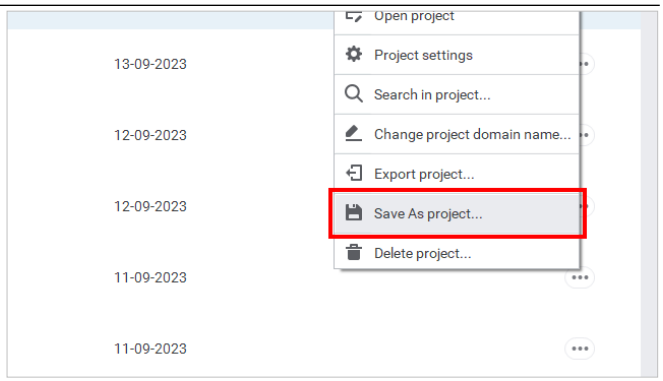
This is a step-by-step guide to using the Save As project feature.

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.

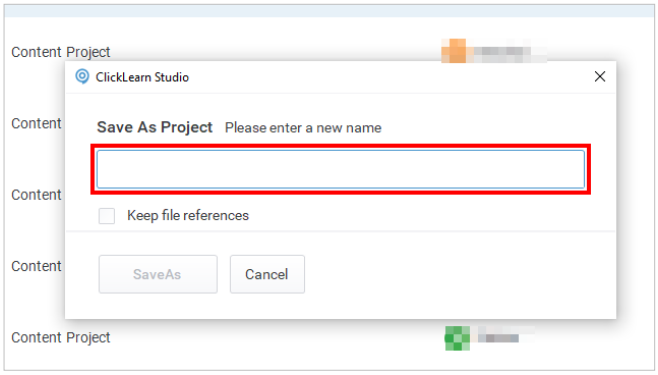
Select the project you wish to save as.
Click on the button **More** of grid cell **Action**.



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



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

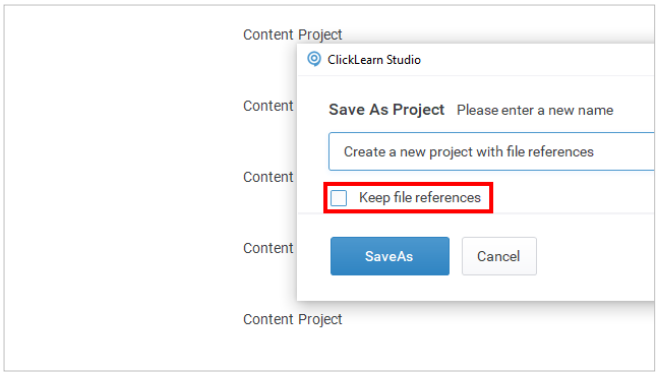


5.6.1.1. Keep File References

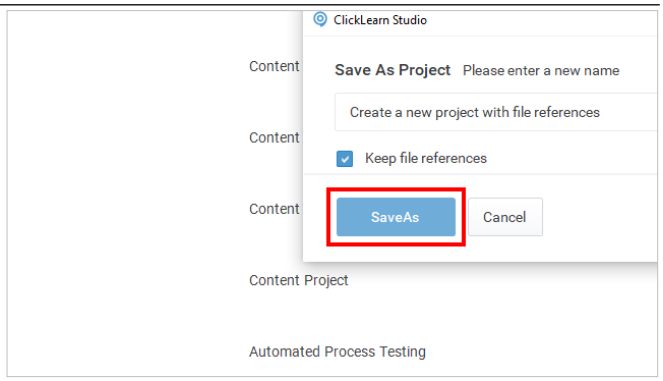
You can decide whether to check or uncheck the file references option, depending on your project needs.

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

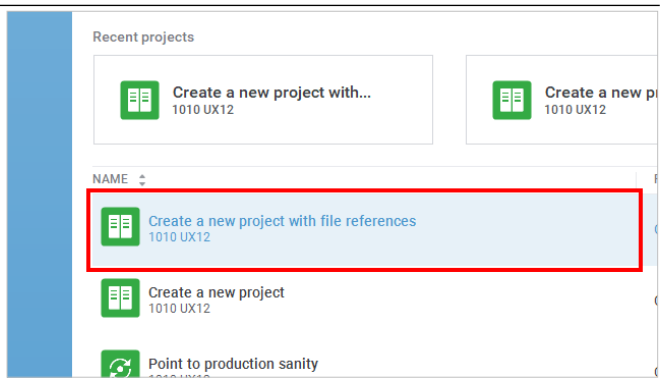
Click on the checkbox **Keep file references**.



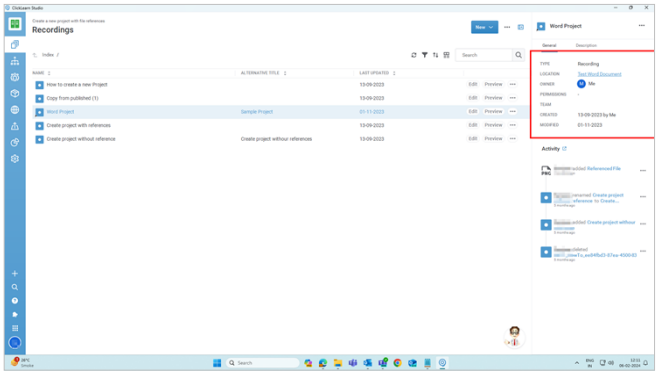
Click on the button **SaveAs**.



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.

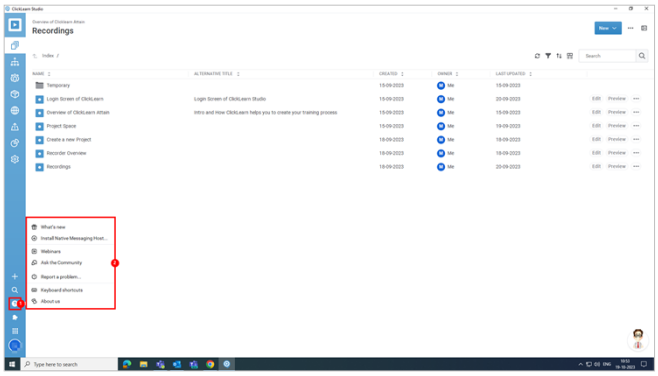
5.7. Get Help and Profile Details

5.7.1. Get Help

Instant access to support, keyboard shortcuts, and release notes, so users can resolve questions without leaving the application.

5.7.1.1. Introduction

Get Help



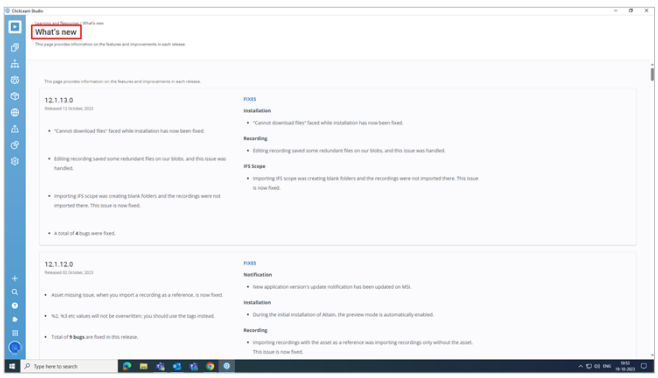
1. **Get Help:** This option offers you more assistance for your projects.
2. The other components associated with get help are:

- What's new
- Install Native Messaging Host
- Webinars
- Ask the Community
- Report a problem to support
- Keyboard shortcuts
- About us

5.7.1.2. Other components associated with Get Help

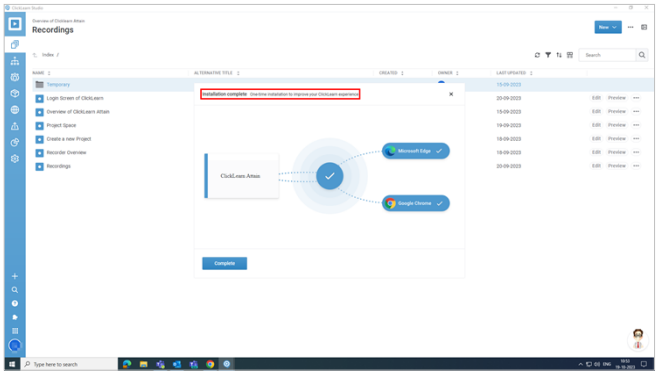
5.7.1.2.1. What's New

What's new: This page provides information on each release's features and improvements.



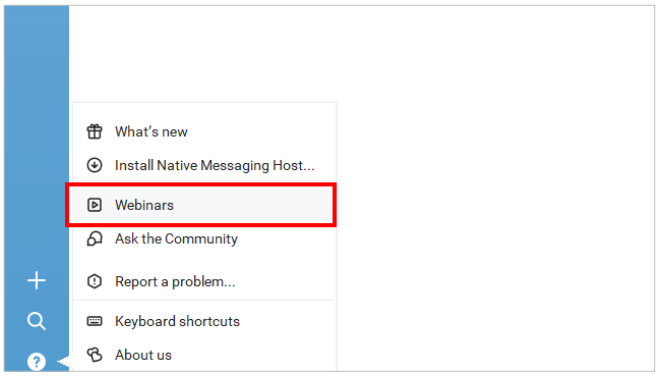
5.7.1.2.2. Install Native Messaging Host

Install Native Messaging Host: This component is required to communicate with the recorder process. It prompts you to install the extension in your browser (Edge or Chrome). Once the installation is complete, it shows you the message "**Installation Complete**."



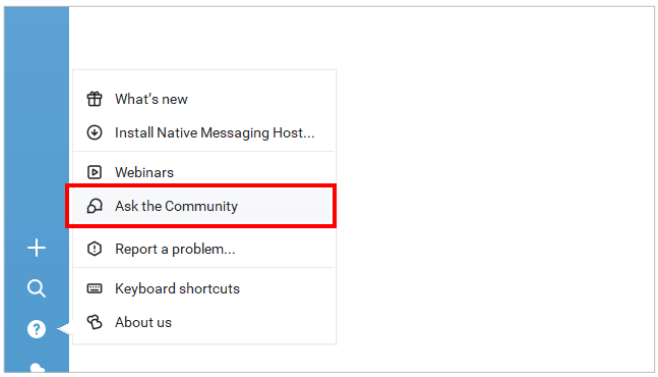
5.7.1.2.3. Webinars

Webinars: This will redirect you to the **Webinars** webpage.



5.7.1.2.4. Ask the Community

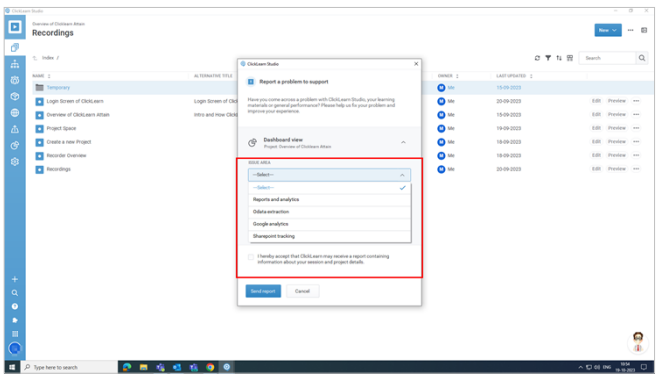
Ask the Community: This will redirect you to the ClickLearn community webpage.



5.7.1.2.5. Report a problem to support

Report a problem: You can use this option to report a problem to support. It opens with a new dialog box showing the project name and **issue area**. You can select the issue area from the drop-down. Issue areas may vary on a project-to-project basis.

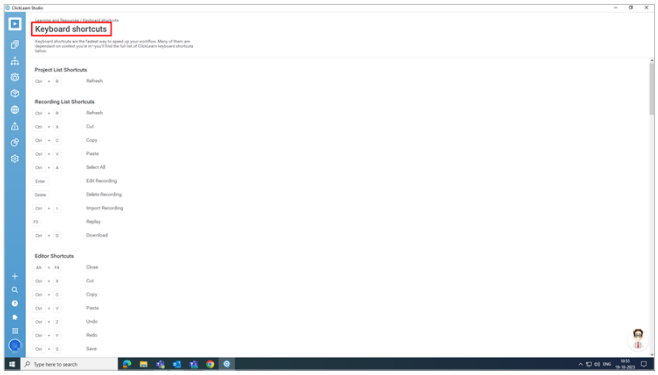
In the **comments** section, you can add a description of the problem and explain how it occurred.



5.7.1.2.6. Keyboard shortcuts

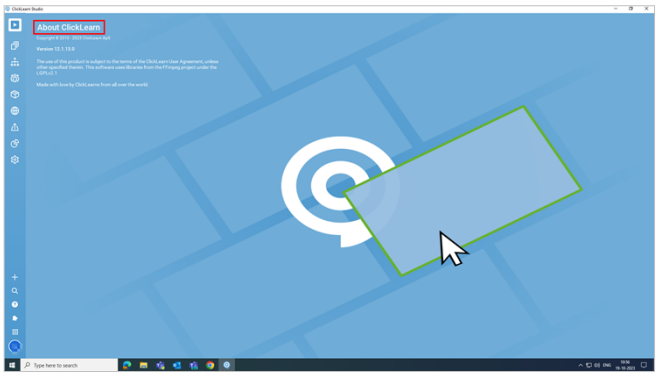
Keyboard shortcuts: These are the shortcuts you can use in ClickLearn Attain.

- Project List Shortcuts
- Recording List Shortcuts
- Editor Shortcuts
- Structure Shortcuts
- Assets Shortcuts
- General Shortcuts
- Global Search Shortcuts
- Localization Shortcuts
- Settings Shortcuts
- Translate Dialog Shortcuts



5.7.1.2.7. About us

About us: This will display the information about ClickLearn Attain.

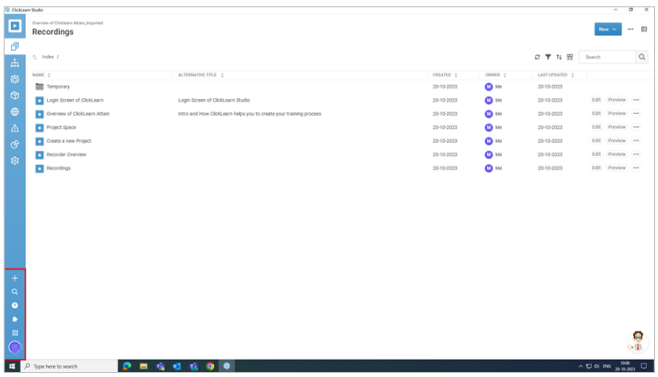


5.7.2. Quick Access Menu

One-click shortcuts to search, create new content, and switch between projects, reducing navigation time for frequent tasks.

5.7.2.1. Search, Help, Notifications and More

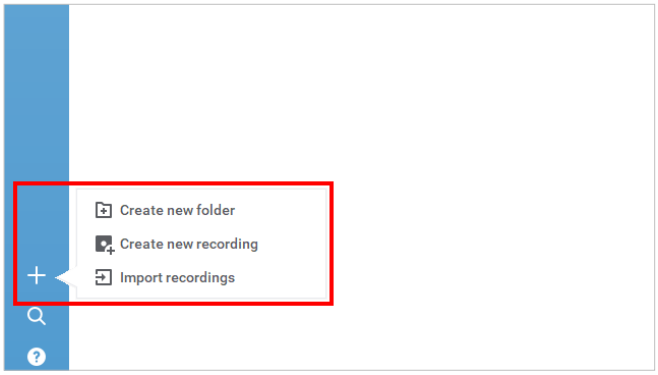
Other Components: The other components associated with ClickLearn Attain are new, search, get Help, notification, switch to, and Profile.



5.7.2.1.1. New

New: The button new offers you three different options.

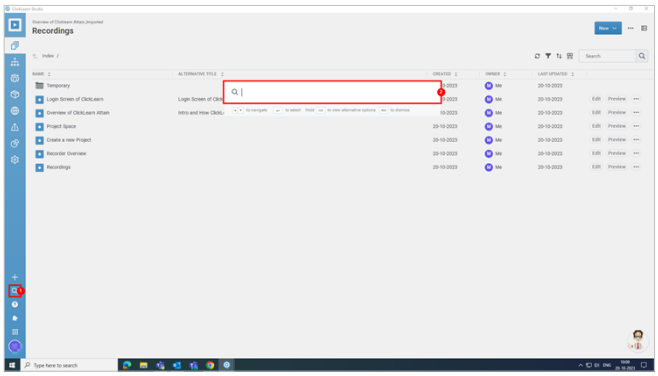
- **Create new folder:** This creates a new folder.
- **Create new recording:** This option creates a new recording.
- **Import recordings:** This allows you to import recordings from the current project, another project, or your local system.



5.7.2.1.2. Search

Search

1. Click on the **Search (ctrl+ F)** button.
2. Click on the textbox **Search**. This option allows you to search for recordings or assets.

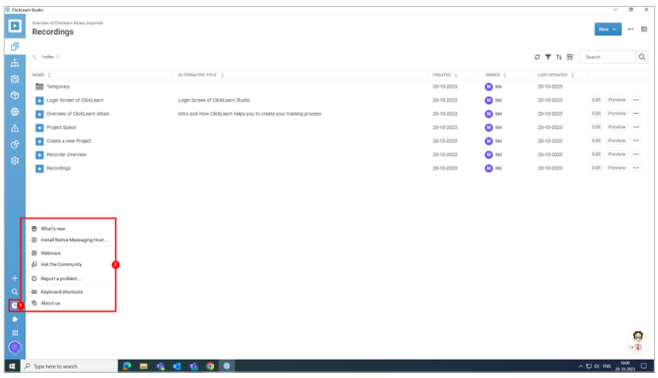


5.7.2.1.3. Get Help

Get Help

1. Click on the button Get Help.
2. The other options associated with Get Help are

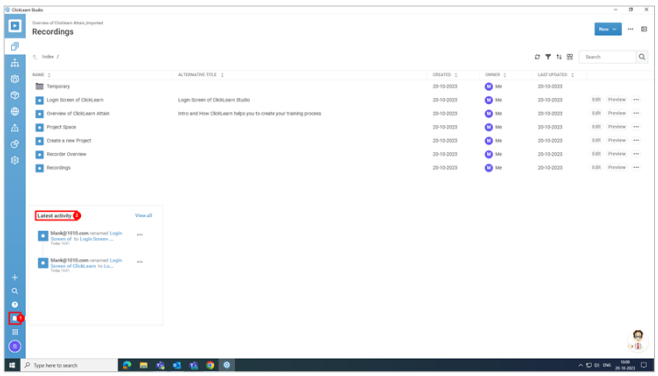
- What's new
- Install Native Messaging Host
- Webinars
- Ask the Community
- Report a problem to support
- Keyboard shortcuts
- About us



5.7.2.1.4. Notification

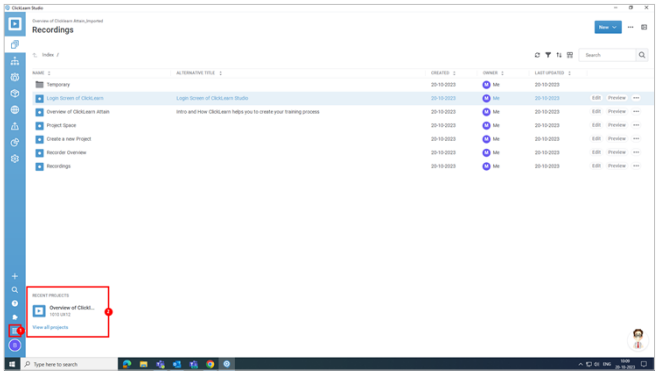
Notification

1. Click on the notification button.
2. It shows you the **Latest activity** of that particular project. The **view all** will redirect you to the **Activity Feed**, where you can find **updates** and **external changes**.



5.7.2.1.5. Switch to

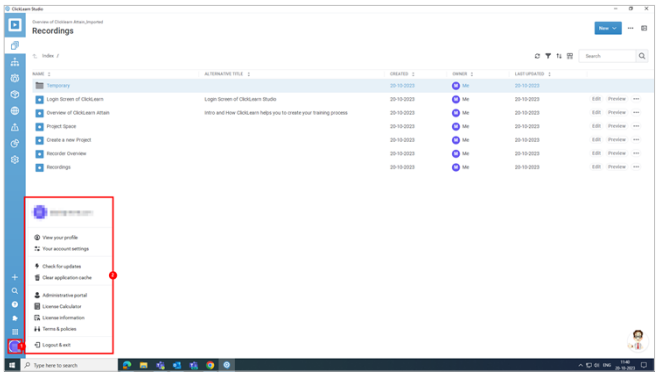
Switch to



1. Click on the button **Switch to**.
2. This will display the recent projects. To view all projects, click on the **view all projects** button. This will redirect you to the **Recent Projects** screen, where you can see the list of projects.

5.7.2.1.6. Profile

Profile



1. Click on the label **Profile**.
2. Here, you can see the profile details.

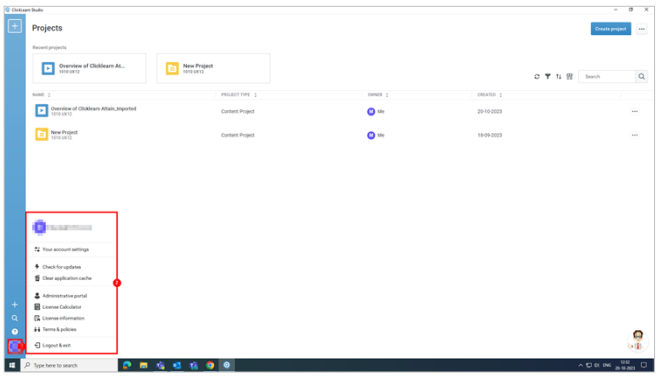
- View your profile
- Your account settings
- Check for updates
- Clear application cache
- Administrative portal
- License Calculator
- License information
- Terms & Policies
- Logout & exit

5.7.3. Manage your profile

Centralized control over personal account settings and preferences, letting users tailor their workspace without contacting an admin.

5.7.3.1. Profile

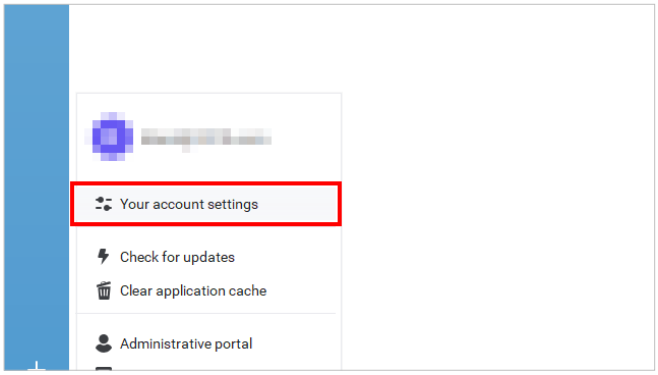
Profile Overview



1. Click on the label **Profile**.
2. You can see the other options associated with Profile.

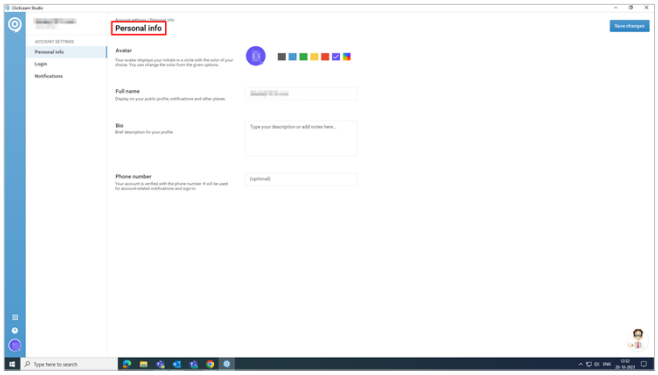
5.7.3.1.1. Your account settings

Your account settings will redirect you to the account settings where you can find options like personal info, login, and notifications.



5.7.3.1.1.1. Personal info

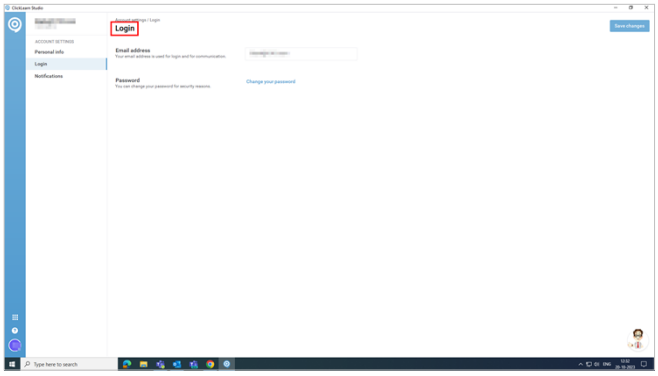
Personal info: The entities associated with personal info are as follows.



- **Avatar:** This displays your initials in a circle with the color of your choice. You can change the color from the given options.
- **Full name:** This displays your full name on your public profile, notifications, and other places.
- **Bio:** You can write a brief description for your profile.
- **Phone number:** Your account is verified with the phone number. It will be used for account-related notifications and sign-in.
- **Save changes:** This will save all your personal info settings.

5.7.3.1.1.2. Login

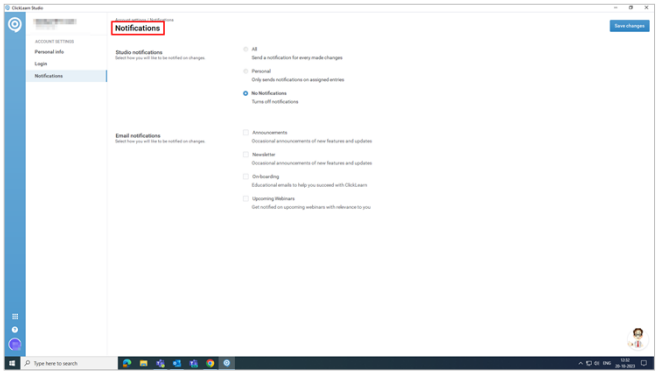
Login: The entities associated with the login screen are as follows.



- **Email Address:** This displays your email address that will be used for login and communication.
- **Password:** You can change your password.
- **Save changes:** This will save all your changes on the login screen.

5.7.3.1.1.3. Notifications

Notifications: The entities associated with the notifications screen are as follows.

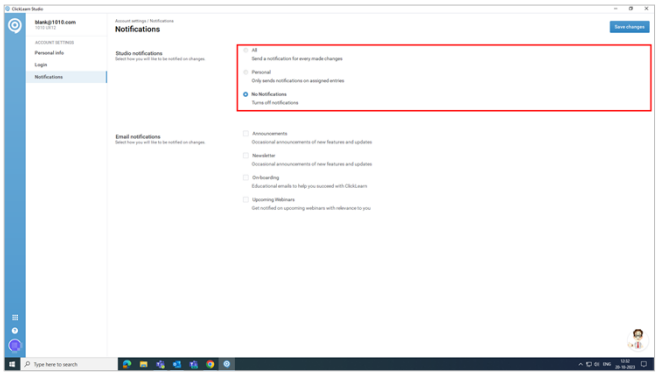


- Studio Notifications
- Email Notifications

5.7.3.1.1.4. Studio Notifications

The studio notifications have three options.

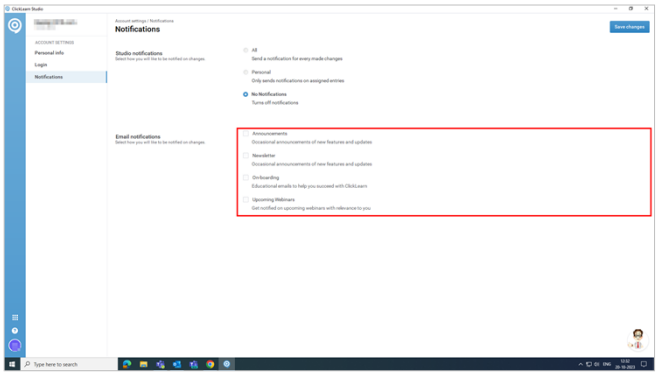
- **All:** This will send a notification for every change made.
- **Personal:** This will only send notifications on assigned entries.
- **No Notifications:** This turns off notifications.



5.7.3.1.1.5. Email Notifications

The email notifications have four options.

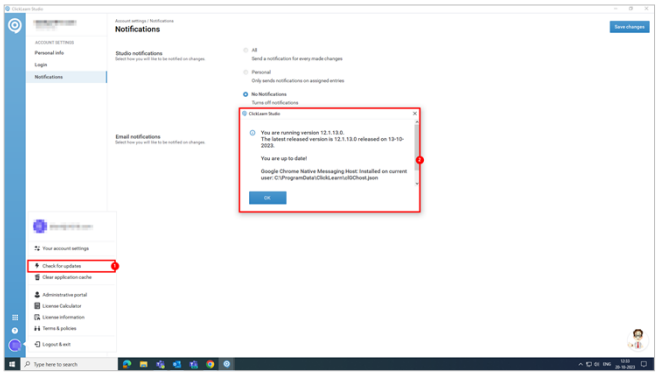
- **Announcements:** This will notify you occasionally about new features and updates.
- **Newsletter:** This will notify you occasionally about new features and updates.
- **On-boarding:** This will notify you with educational emails to help you succeed with ClickLearn Attain.
- **Upcoming Webinars:** This will notify you of the forthcoming webinars that are relevant to you.
- **Save changes:** This will save all your changes in the notifications screen.



5.7.3.1.1.6. Check for updates

Check for updates

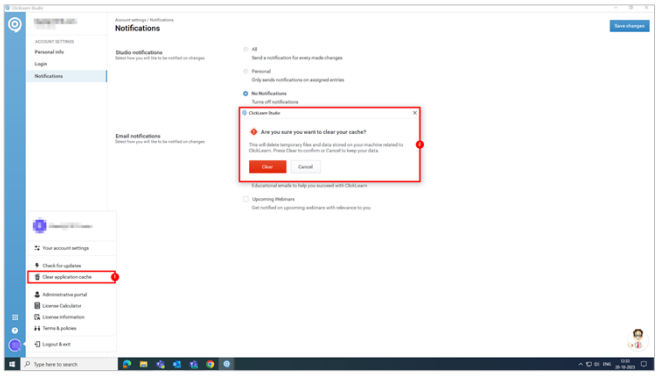
1. Click on **Check for updates**.
2. This shows you the current version that you are using and whether the studio is up to date or not.



5.7.3.1.1.7. Clear application cache

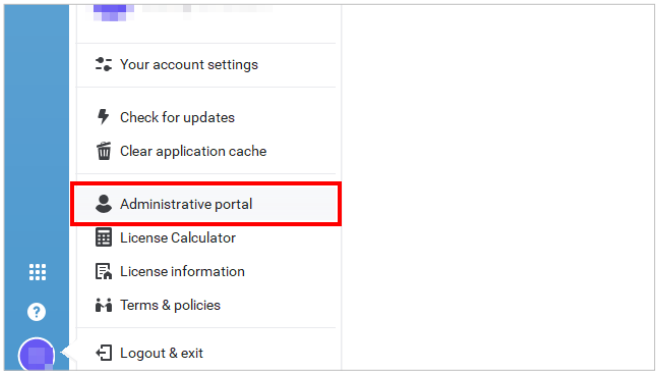
Clear application cache

1. Click on the label **Clear application cache**.
2. **Clear application cache:** This will delete temporary files and data related to ClickLearn Attain stored on your machine. Press Clear to confirm or cancel to keep your data.



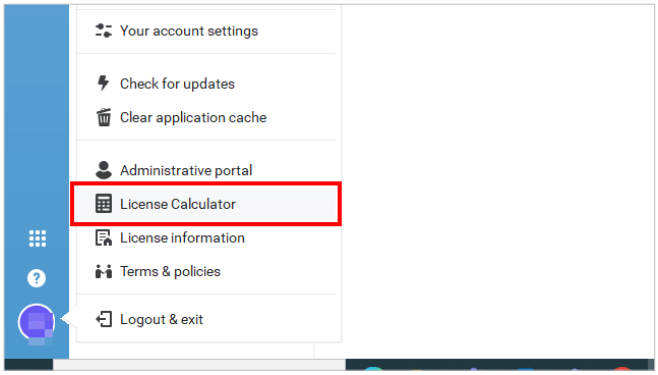
5.7.3.1.1.8. Administrative portal

Administrative portal: This will redirect you to the ClickLearn portal.



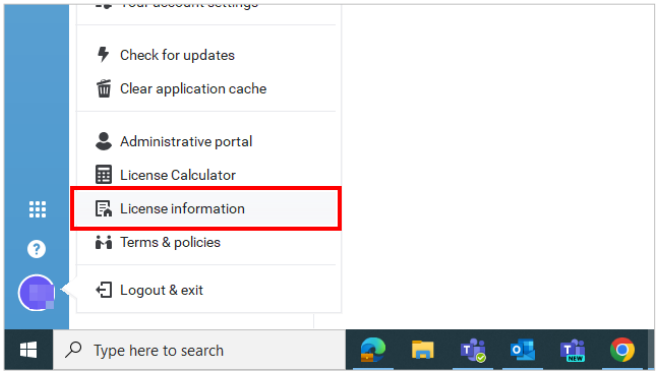
5.7.3.1.1.9. License Calculator

License Calculator: The **License calculator** is a feature that allows you to estimate the cost of your subscription based on the number of platforms, editions, authors, and users you need.



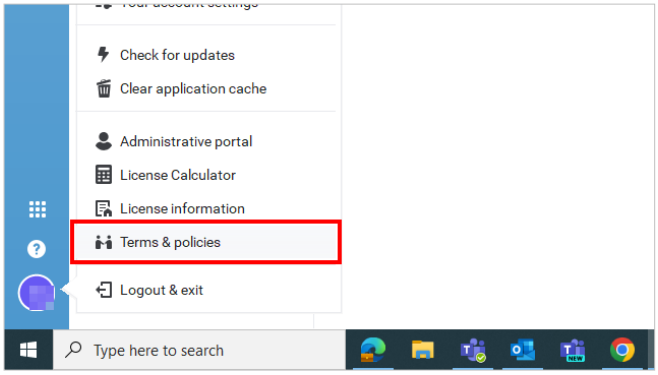
5.7.3.1.1.10. License Information

License information: This will redirect you to the licensing webpage. This option allows you to view and manage your license details.



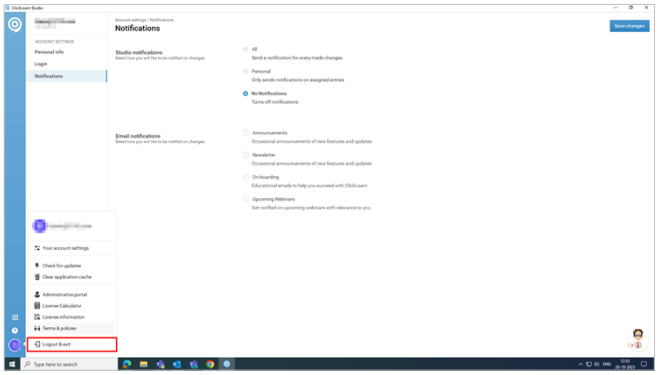
5.7.3.1.1.11. Terms & Policies

Terms & policies: This will redirect you to the privacy policy webpage.



5.7.3.1.1.12. Logout & Exit

Logout & exit: This will sign you out from your account and close ClickLearn Attain.



6. Recordings

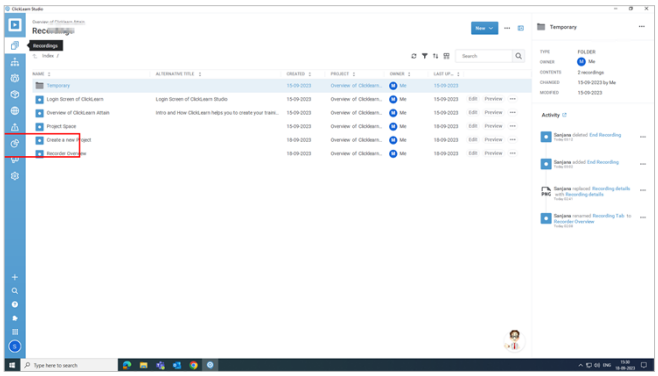
6.1. Recording Menu Options

6.1.1. Manage Recordings in the Portal

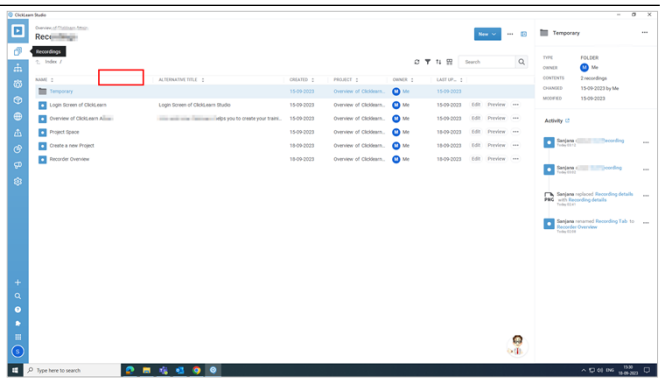
View, organise, and control access to recordings stored in the portal, so content stays accessible to the right authors and protected from unauthorised changes.

6.1.1.1. Introduction

Click on the button **Recordings.**



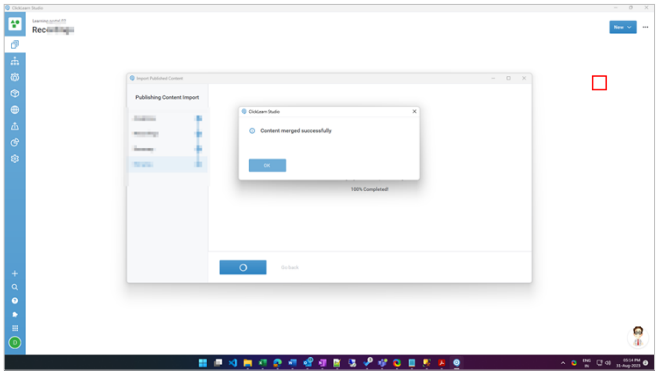
This is how the recording screen appears when you choose recordings.



6.1.1.1.1. Overview of recordings

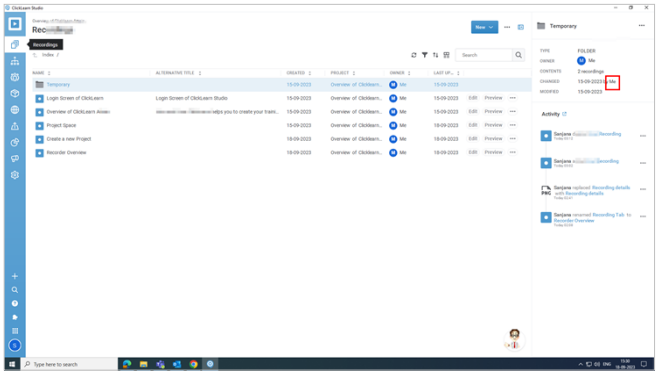
6.1.1.1.1.1. Search

Click on the **Search** button to find any recordings you would like to access.

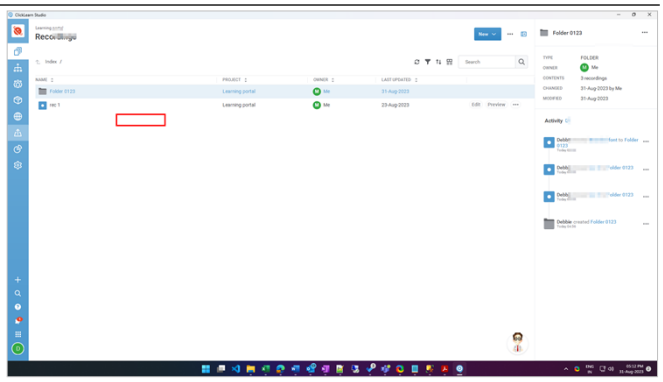


6.1.1.1.1.2. Create New Folder

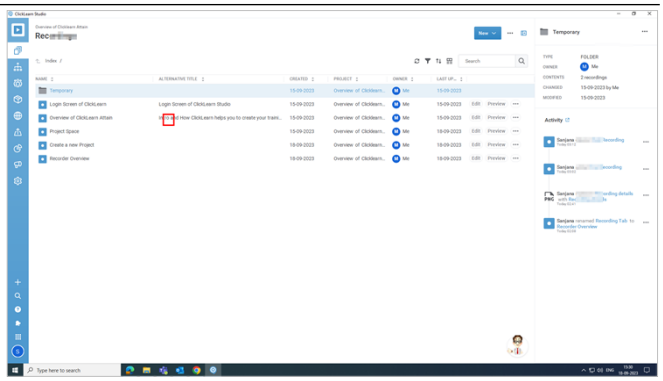
Click the **Create new recording folder** button to create a new folder.



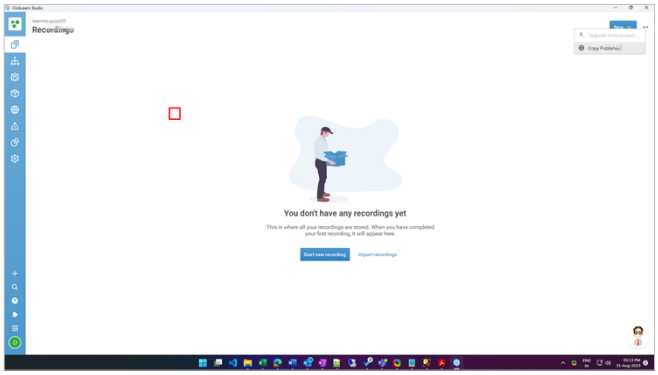
Click on the input field **Enter folder name to** name the folder you create.



Click on the button **Save.**

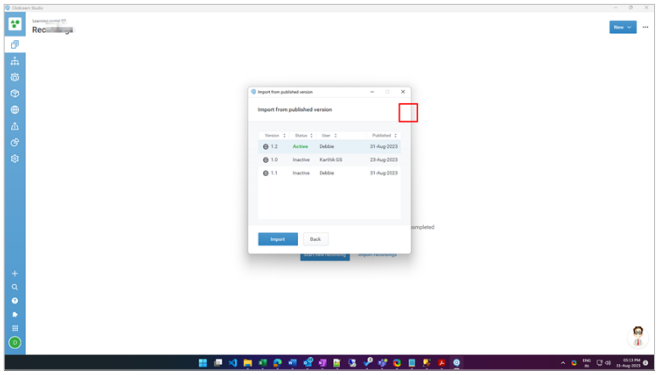


Click on the **remove folder button**.

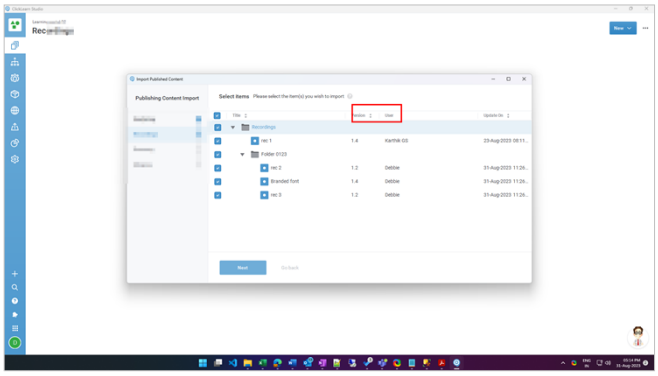


6.1.1.1.1.3. Open Menu

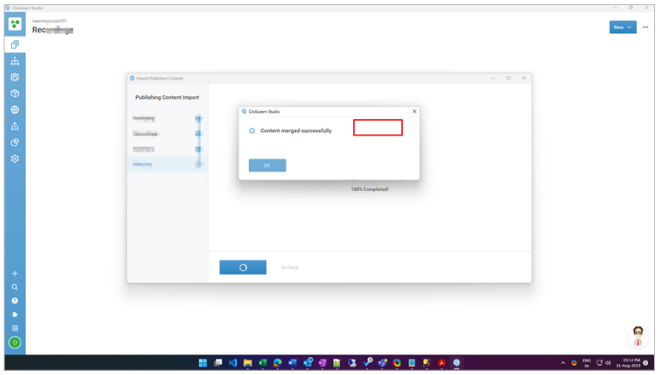
Click on the button **open menu.**



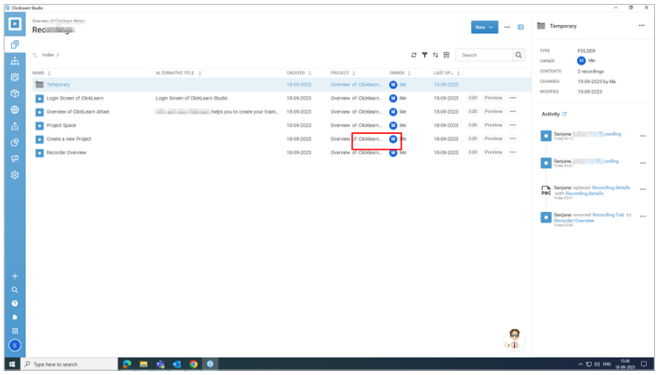
Click on the button **Permissions.**



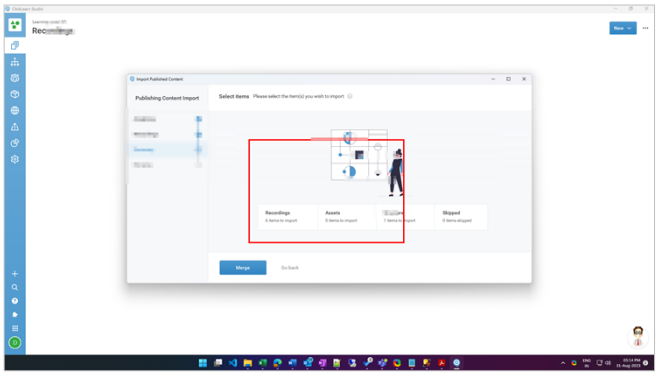
Click on the button **Delete.**



Click on the button **Properties.**

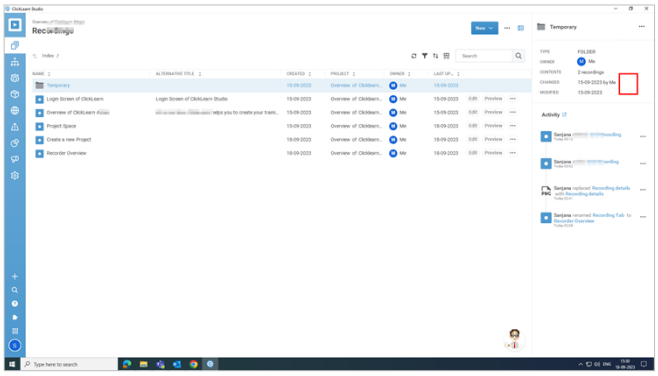


This opens a property pop-up where you can see the project type, location, what it contains, and who created and modified it. You can also see whether the produced version is enabled or not, and you can disable it by toggling off. Click on **Save**.

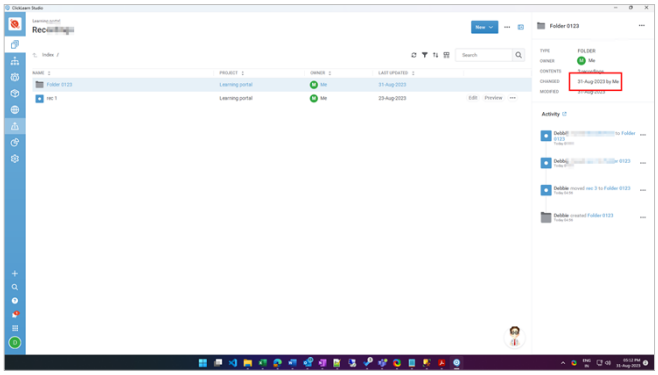


6.1.1.1.1.4. Permissions

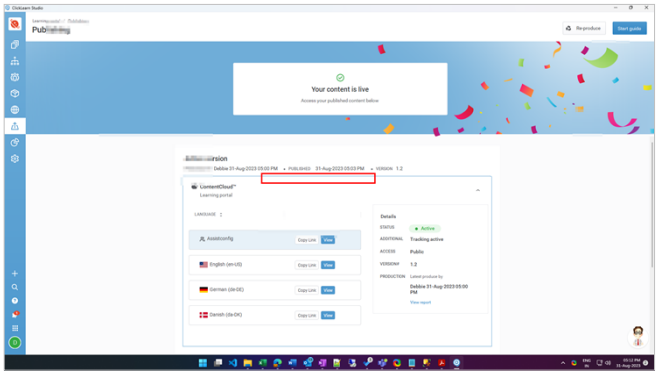
Click the **three-dot button** to open the menu.



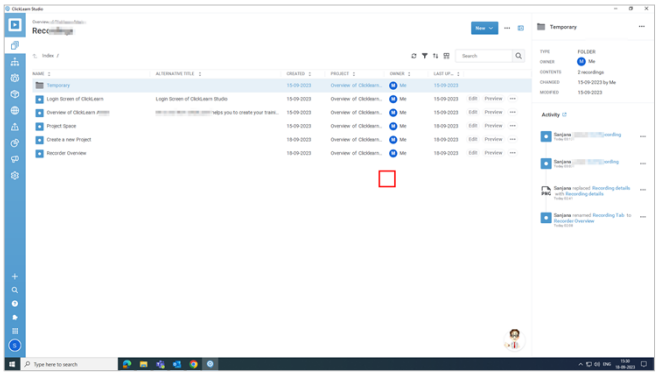
Permissions: This shows your users and group access rights to the folder or recording.



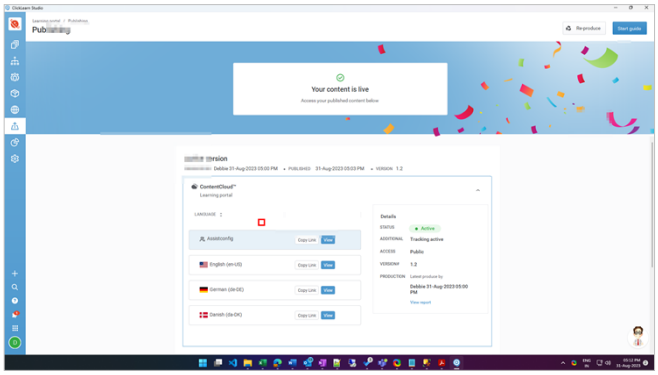
Click on the input field **Search users and groups.**



Click on the button **Add** to enable user and group permissions.

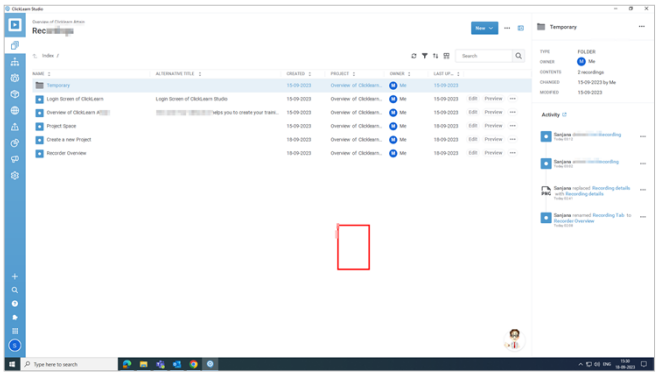


Choose the user you want to edit and specify their group access level.

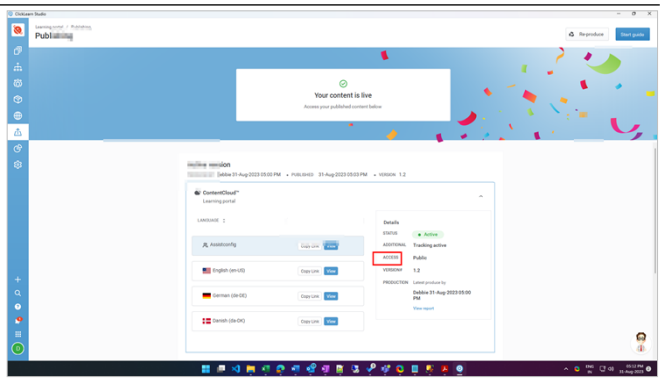


Select the option from the dropdown to provide access level.

Click on the dropdown item: **Fullcontrol**.

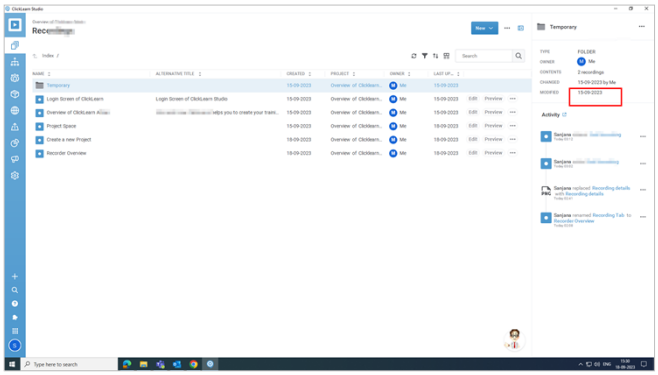


Click on the **Save** button.

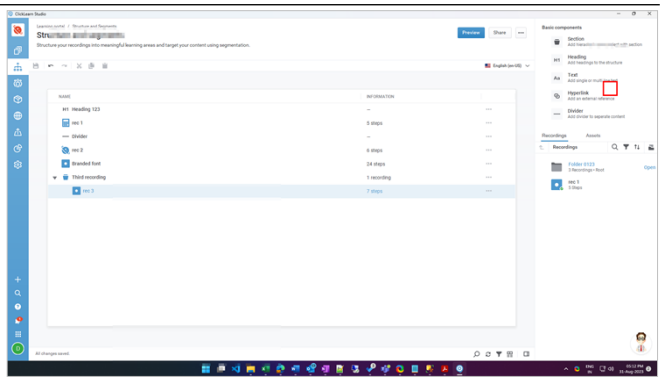


6.1.1.1.1.5. View Lost Files

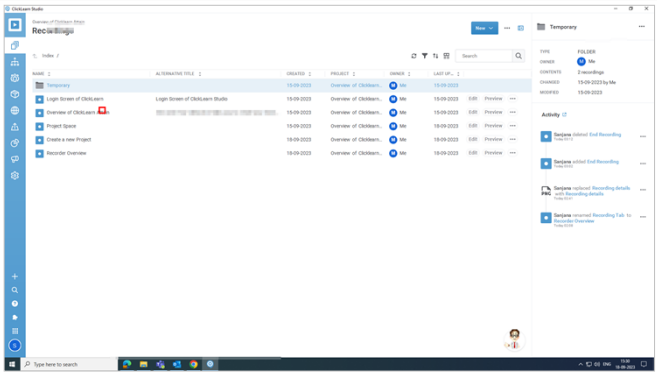
View lost files: To locate any missing files.



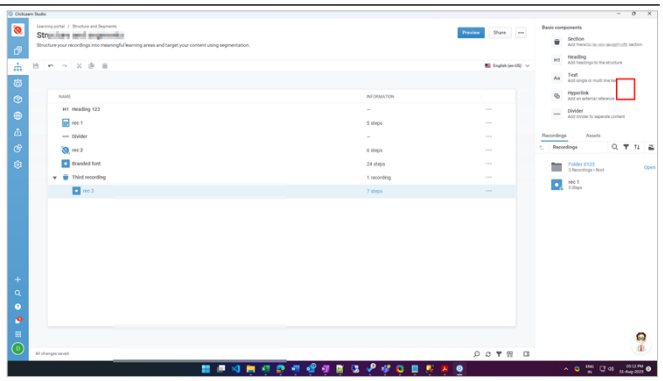
Click on the button **Search** to find lost files.



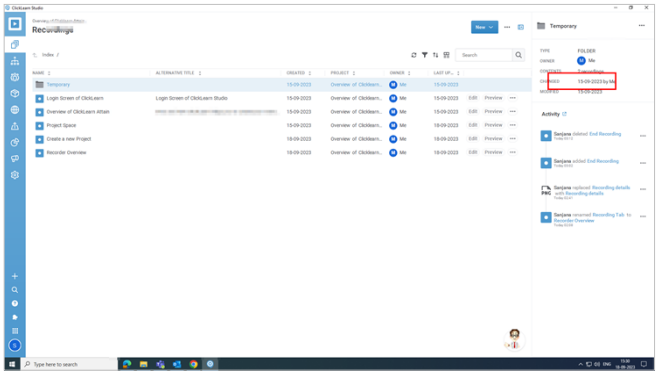
Select any file from the list that you would like to recover.



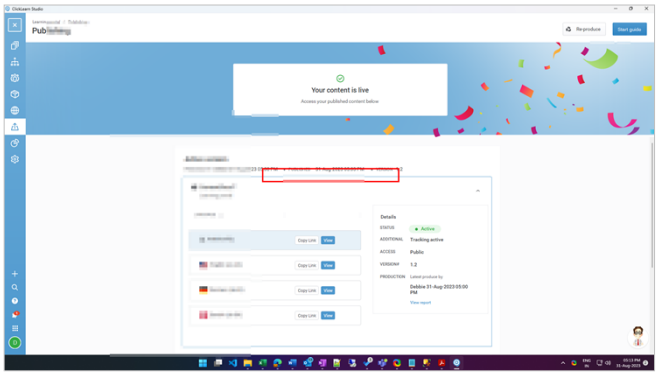
Click on the **three-dot menu.**



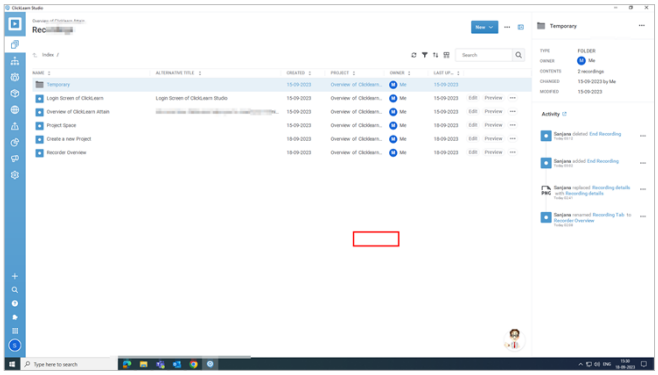
Click on the button **Recover selected files** to recover multiple lost files.



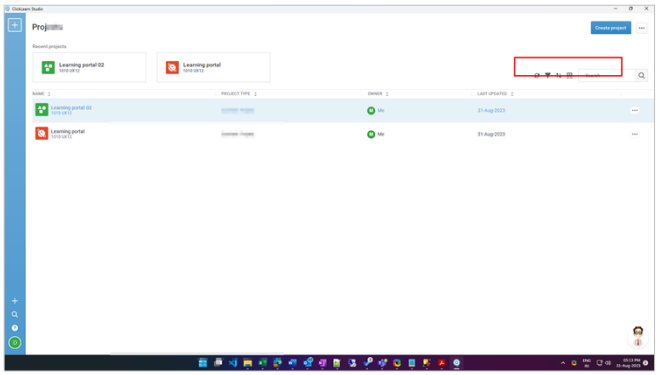
Choose the folder where you wish to add lost files.



Click on the button **Select Folder**.

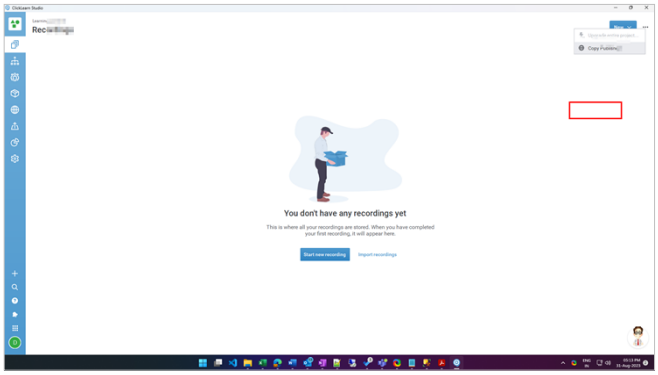


Once recovery is completed, you will be notified in the notification.



6.1.1.1.1.6. Refresh

Refresh: To reload or update what is displayed or stored on a page.



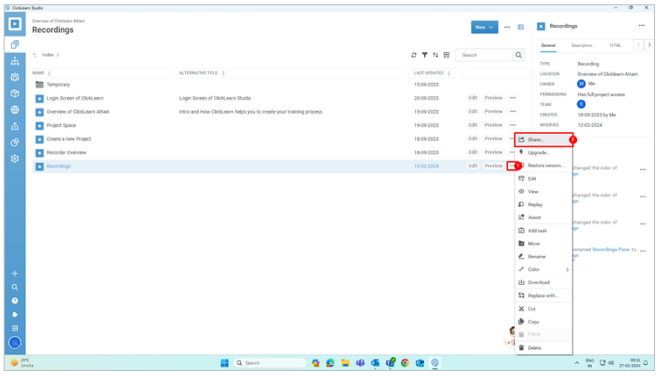
6.1.2. More Options in Recording Menu

Deeper control over recording settings and advanced actions, giving the flexibility to customise content.

6.1.2.1. Options in the more menu

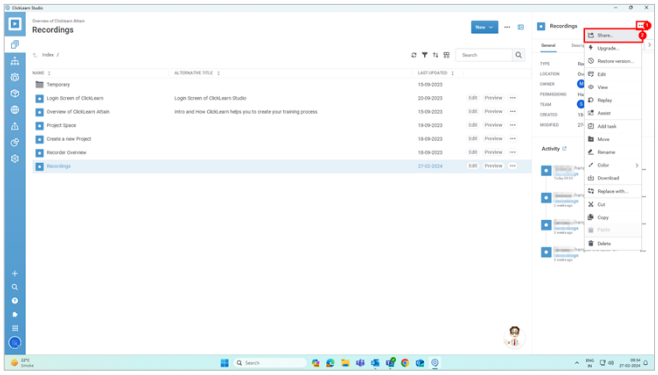
More

1. Click on the **More** button of grid cell **Action** to view the more menu options.
2. Click on the menu item **Share** to share the recording.



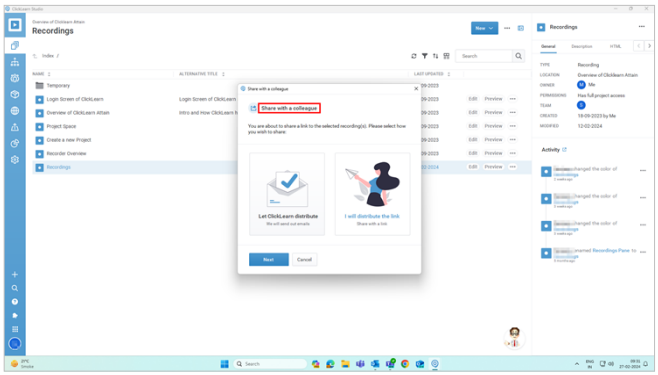
More Menu Options

1. Another way you can access the **More** menu options.
2. Click on the menu item **Share** to share the recording.



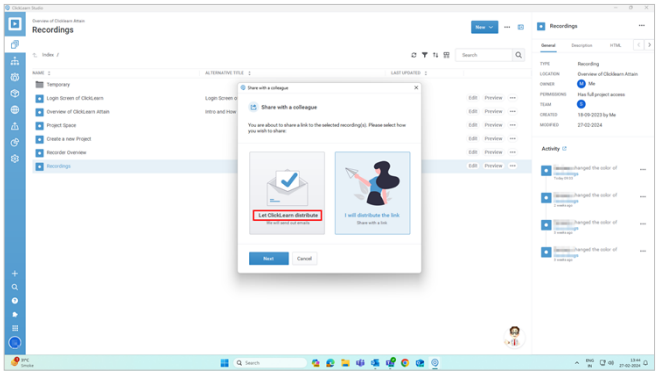
6.1.2.1.1. Share

This allows you to share a recording with your colleagues inside or outside your organization. When you select this option, a new window called "**Share with a colleague**" will appear, where you can choose one of two ways to share your recording.

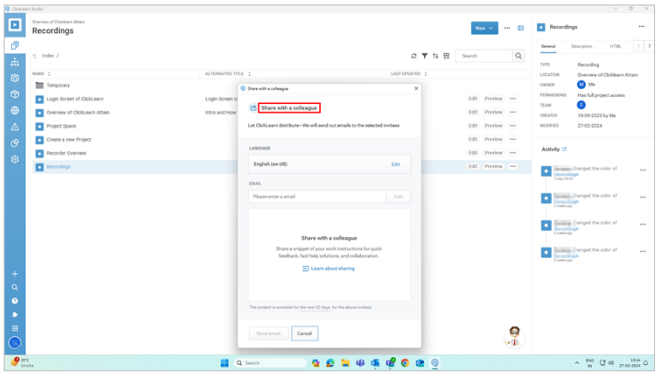


6.1.2.1.1.1. Let ClickLearn distribute

Click on the label **Let ClickLearn distribute** and click on the button Next.

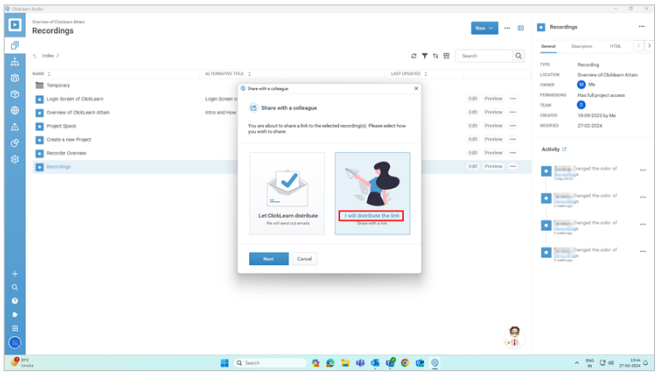


It opens with a new window, "**Share with a colleague**," where you need to type the colleague's email address, click Add, and send email. ClickLearn will send the recording to them. ClickLearn will take care of sending the emails for you.

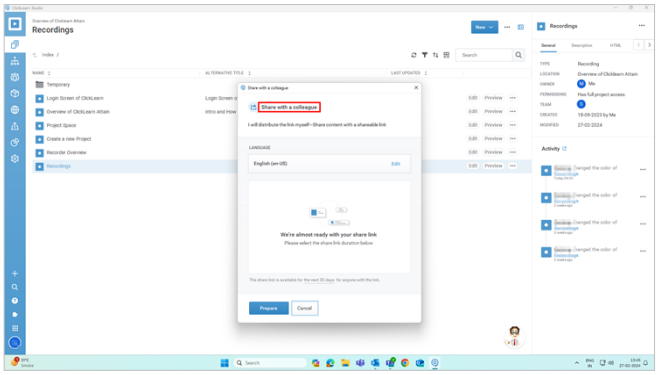


6.1.2.1.1.2. I will distribute the link.

Click on the label: **I will distribute the link**, and click on the button Next.

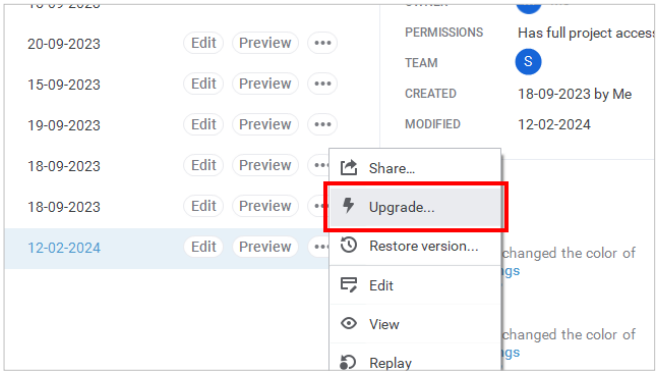


Share with a colleague: If you prefer sharing the link, select this option and click Prepare. It then generates a link that you can share with anyone.



6.1.2.1.2. Upgrade

Click on the menu item **Upgrade**.



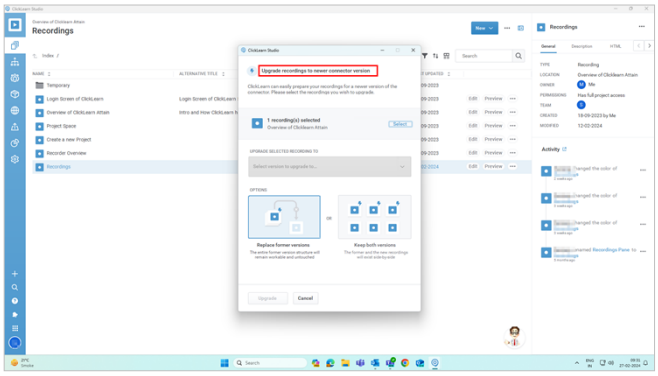
ClickLearn can prepare your recordings for a newer version of the connector.

A new window pops up, "**Upgrade recordings to newer connector version**," where you must select the recording you want to upgrade to.

You have two options for the upgrade process.

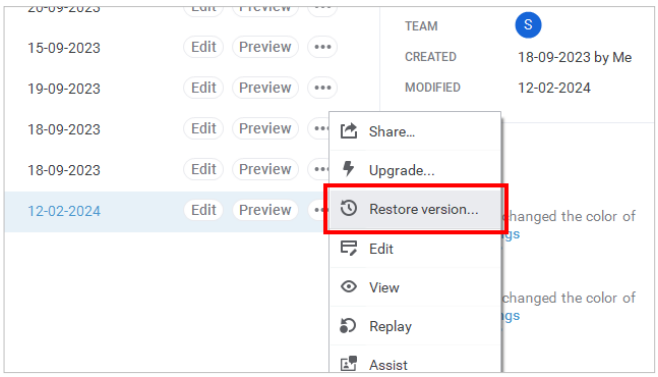
Replace former versions: This will overwrite the old version with the new one.

Keep both versions: This will keep your project's old and latest versions.



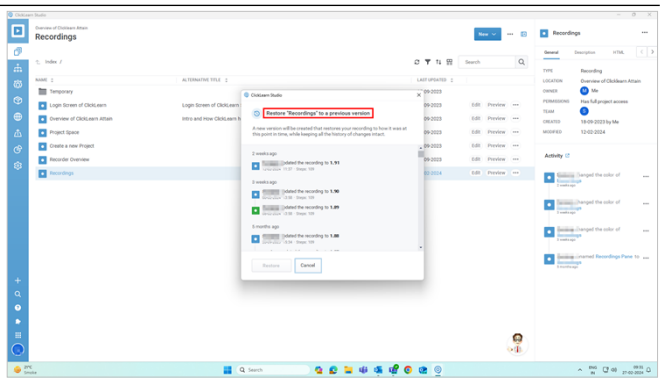
6.1.2.1.3. Restore version

Click on the menu item **Restore version**.



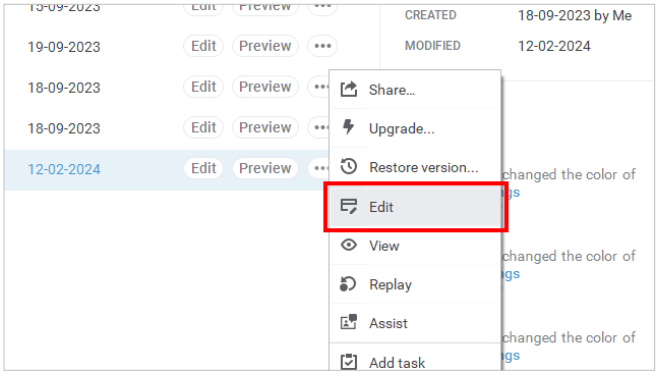
Restore version opens up with a new pop-up window, "**Restore "Recordings" to a previous version**," which restores your recording to how it was at this point while keeping all the history of changes intact.

Choose the version you want to restore from the lists and click the restore button. It will successfully restore to the version you selected.



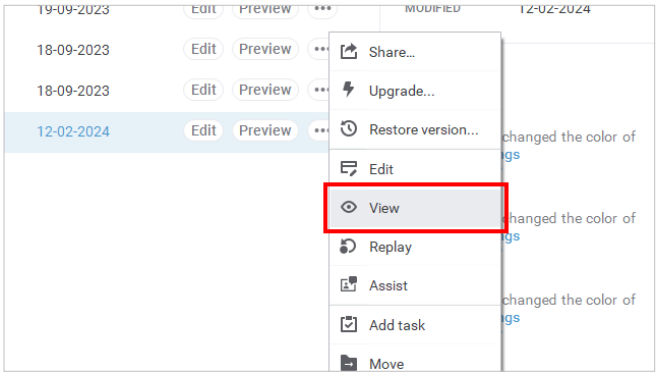
6.1.2.1.4. Edit

Edit allows you to edit and modify your recordings.



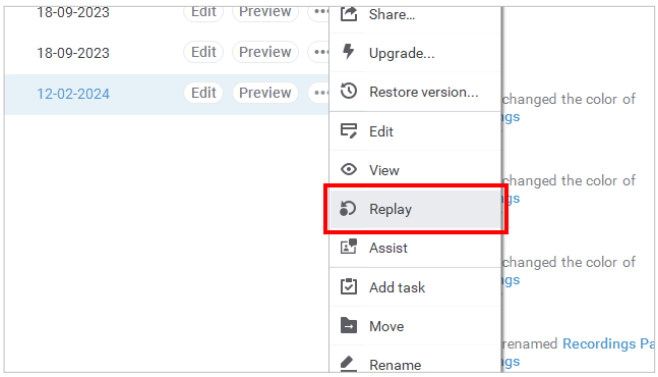
6.1.2.1.5. View

The **View** button shows you a preview of how your recordings look like.

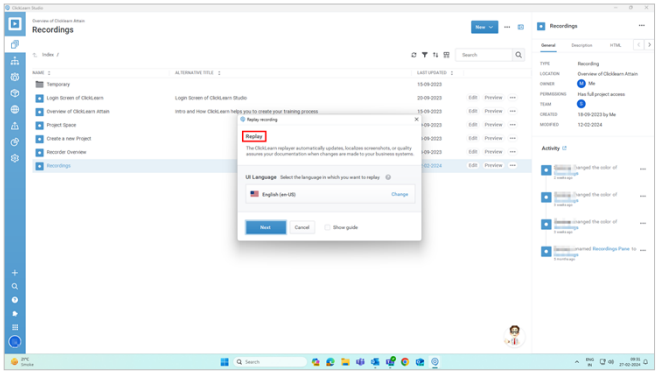


6.1.2.1.6. Replay

Click on the menu item **Replay**.

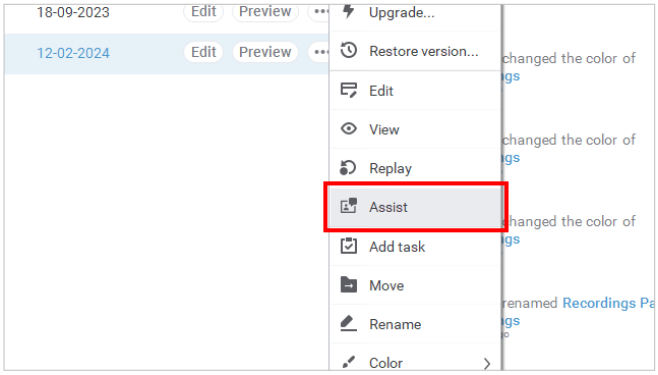


The **Replay** function will help you keep your documentation up-to-date when you change your business systems. It will capture new screenshots in your chosen language. Also, you can check the show guide option for further assistance, which will guide you for the replay.

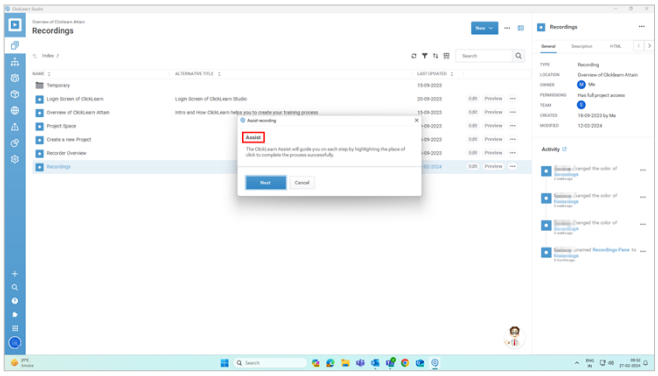


6.1.2.1.7. Assist

Click on the menu item **Assist**.

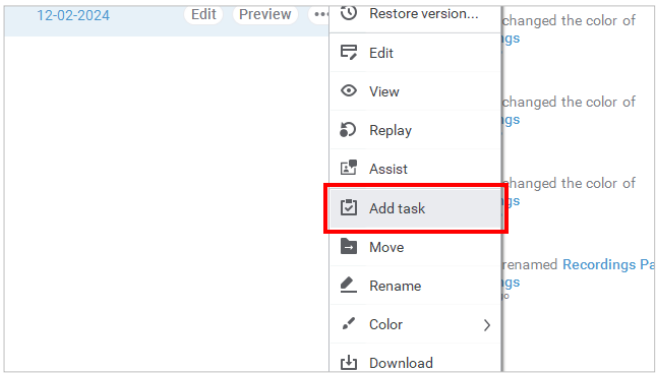


The **Assist** function will guide you on each step by highlighting the place of the click to complete the process successfully.



6.1.2.1.8. Add task

Click on the menu item **Add task**.



This opens a new window, "**New Task**".

You need to enter the following information to add a task.

Task name: The name of the task.

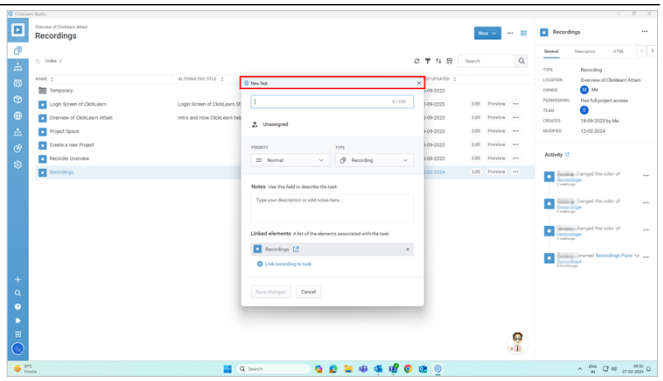
Assign: You can assign the task to the team member you wish to collaborate with.

Priority: The level of urgency for the task. You can choose from low, lowest, normal, high, or highest.

Type: The category of the task. You can select from recording, asset, structure, publishing, or localization.

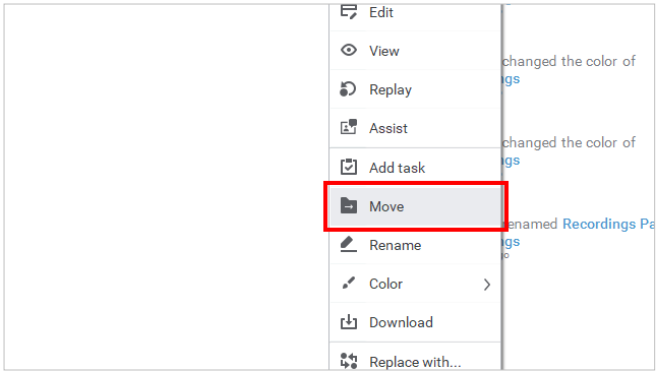
Notes: Any additional information or instructions for the task.

Linked elements: You can link any recordings related to the task.

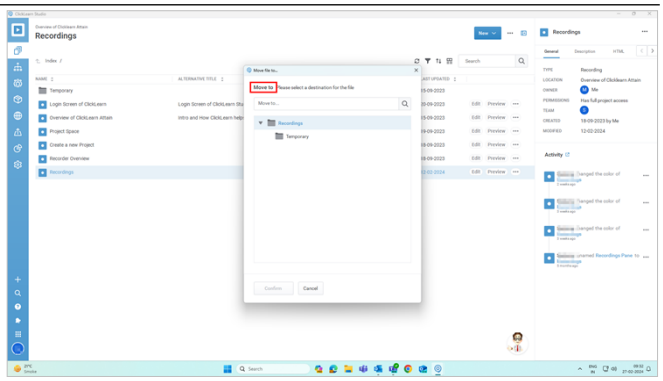


6.1.2.1.9. Move

Click on the menu item **Move**.

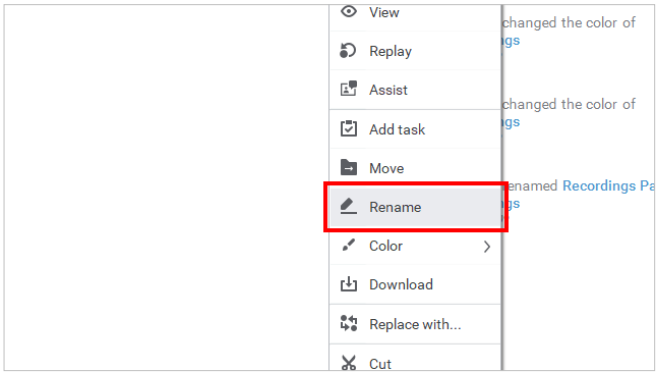


Move to: You can use this option to change the folder where a recording is stored. You will see the existing folders if you have any.

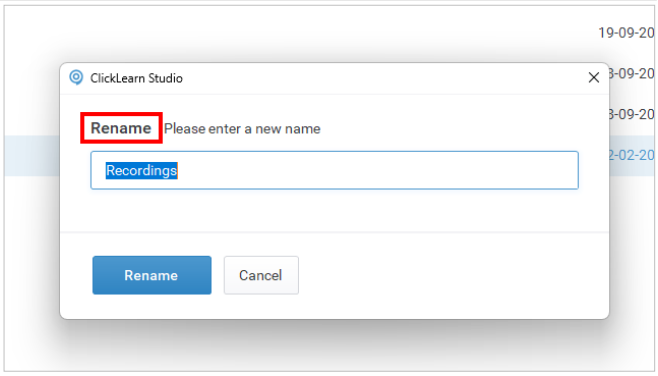


6.1.2.1.10. Rename

Click on the menu item **Rename**.

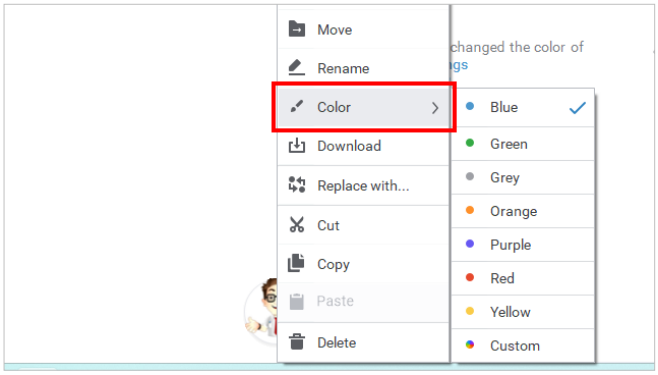


As the name suggests, **Rename** is used to rename the recording.



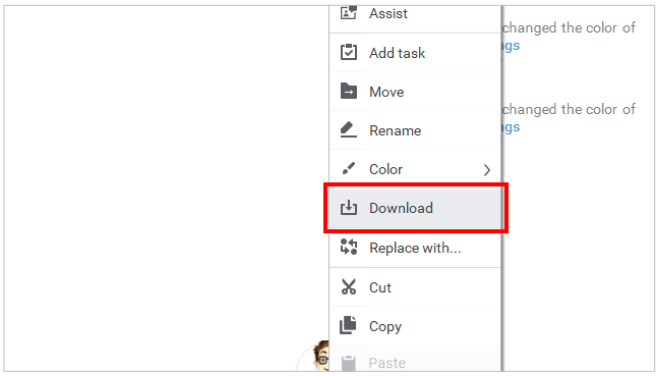
6.1.2.1.11. Color

You can change the icon **Color** of your recordings from here.



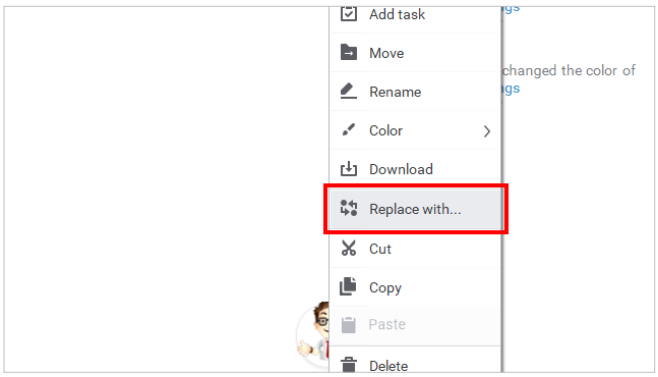
6.1.2.1.12. Download

Download: With this option, you can save the recordings to your local system by downloading them.

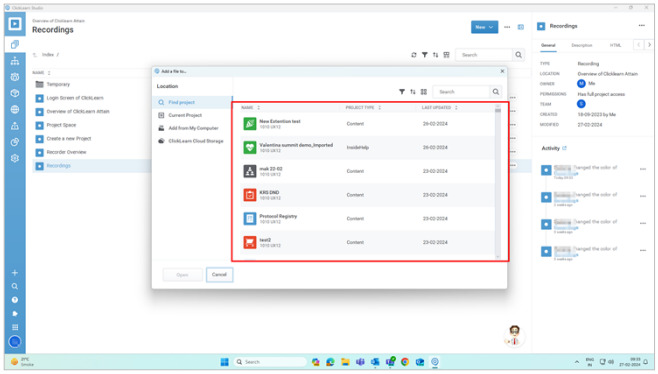


6.1.2.1.13. Replace with

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



You can select a recording from another project and replace it with the current recording.



6.1.2.1.14. Cut

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

6.1.2.1.15. Copy

You can copy the recording you have selected.

6.1.2.1.16. Paste

Paste will save the copied recording at the chosen location.

6.1.2.1.17. Delete

This function will delete the selected recording.

6.2. Start a Recording

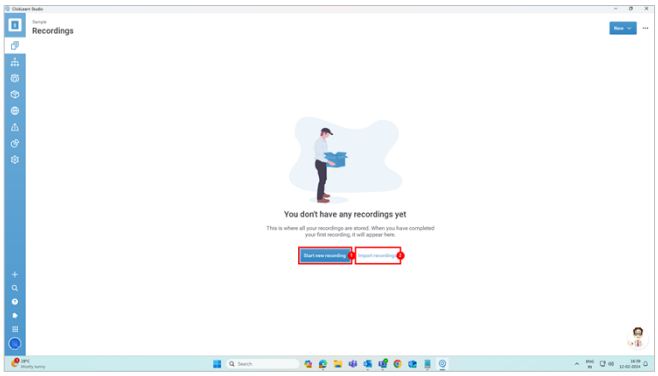
Capture a process accurately on the first attempt as a well-set-up recording environment prevents the most common replay failures later.

6.2.1. How to start recording?

Here is a step-by-step guide on how you can start a recording.

Once you create a project, go to the recordings tab and begin or import recordings.

Recordings



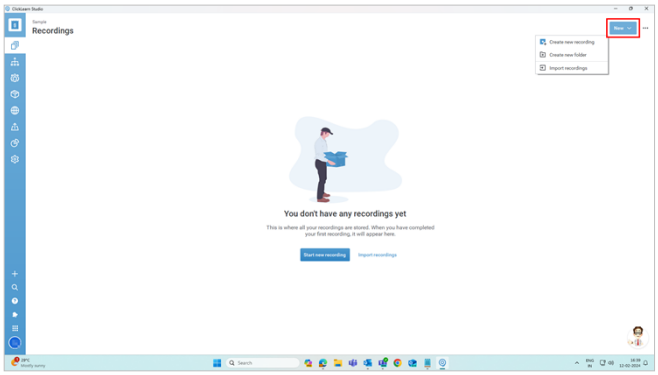
1. **Start new recording:** This option allows you to start a new recording.
2. **Import recordings:** This feature lets you bring recordings from different sources into your projects.

You can import your recordings from:

Find from project: This enables you to select a recording from a specific project.

Add from My Computer: You can browse the recording from your local system.

ClickLearn Cloud Storage: You can access the recording in the cloud storage.



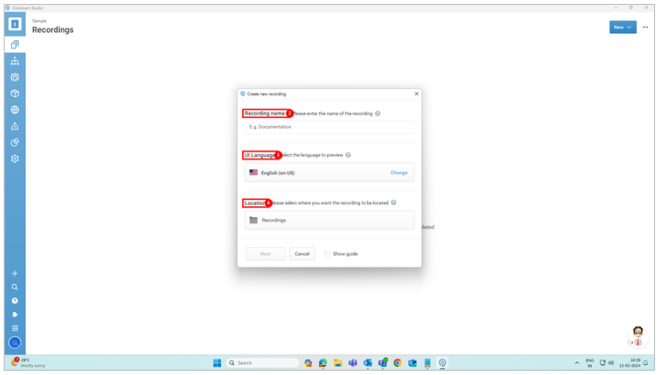
You can also create a new recording by clicking on the **New** button at the top right corner of the screen. You will see three options:

Create new recording: This feature lets you create a new recording.

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

Import recordings: This is the same feature as explained above.

Create new recording

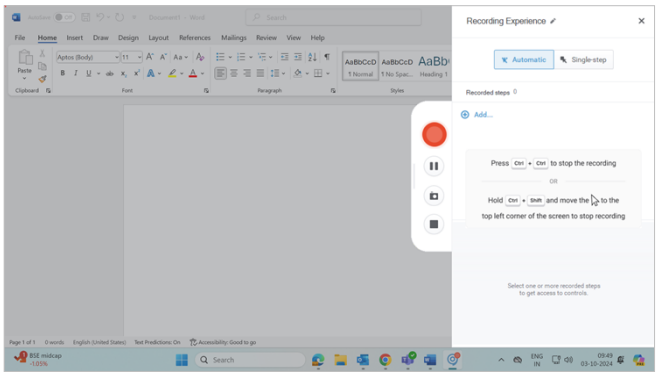


1. When you click the Create new recording button, it will pop up with a new recording window wherein you must enter the following details.
2. **Recording name:** Here, you need to mention the name of your recording.
3. **UI Language:** You can select the UI language you wish your project to be in.
4. **Location:** The location where you want your recording to be.

6.3. Recording Experience

Understand the options in the Recording Experience panel to capture your content best.

6.3.1. Basic Elements



After entering the details, you will see a recorder where you can record your business processes.

You can choose how you want to record your steps. There are two options available.

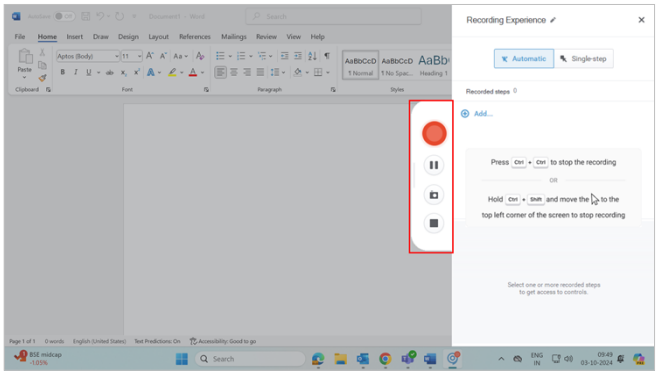
Automatic: This feature lets you record your actions continuously until you stop the recording.

Single-step: This feature enables you to record only one step at a time.

The steps you have recorded will appear below the **recorded steps** option.

Editing the steps that you have recorded is also possible with the recorder.

6.3.1.1. Recorder Overview



Buttons for recording:

Record: To begin your recording.

Pause: Take a break from the recording to adjust the screen or dismiss a notification that hinders the recording.

Annotated Screenshot: It captures the annotated screenshot. By moving the cursor, you can capture the annotated screenshot.

Stop: To end the recording.

6.3.1.2. End the recording

When you complete recording your business processes, **press both control keys**. If you do not have two control keys on your keyboard, **move your cursor to the top left corner and press the left Ctrl and left Shift keys**. Then, click on the stop button on the recorder.

6.4. Editors

6.4.1. Edit Steps in the Written Editor

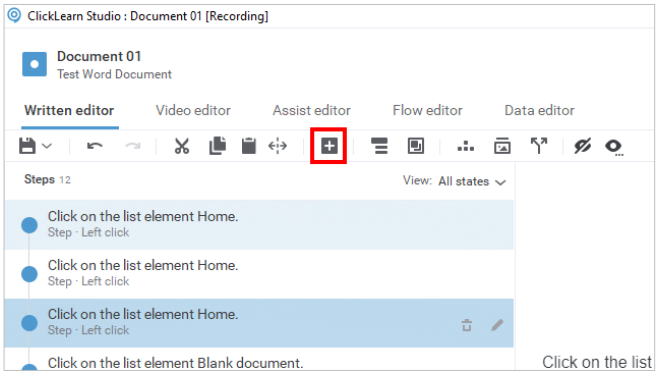
6.4.1.1. Text Blocks

Adjust instructional text at the step level, so your written guide matches your organization's tone and detail requirements.

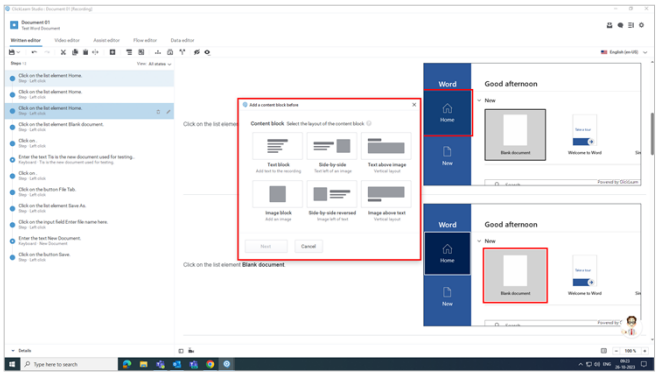
6.4.1.1.1. Overview of Text Blocks

6.4.1.1.1.1. Add New Text Block

Add New Text Block: You can add a new text block to your recording based on your project requirements. Content blocks contain both images and text. You can decide how your text and images appear in your documents.

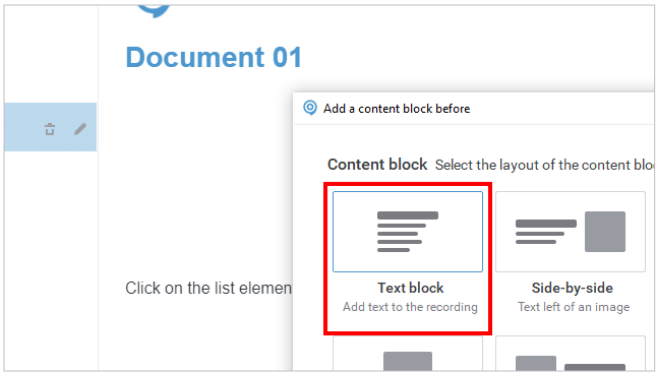


This pops up with a new dialog box with different options to add a text block.



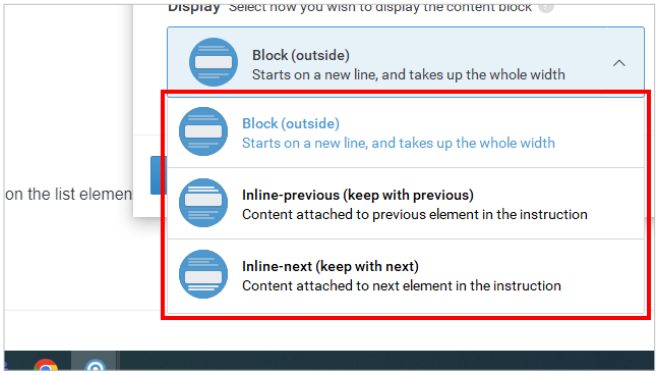
6.4.1.1.1.2. Text Block

Text block: You can add text to the recording. Click on the title **Text block**.



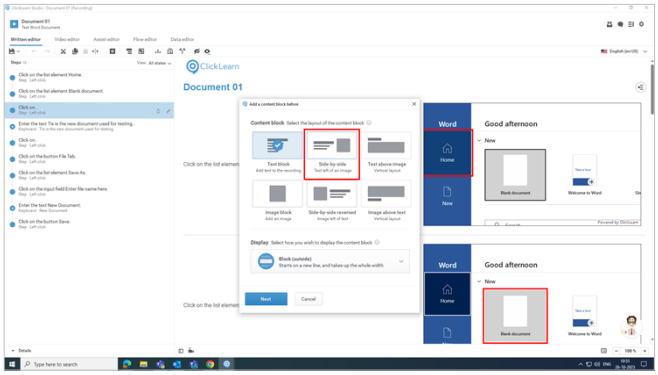
Display: You can select the display type and how you wish to display the content block.

- **Block (outside):** It will start on a new line and cover the width.
- **Inline-previous (keep with previous):** The content block will be attached to the previous element in the instruction.
- **Inline-next (keep with next):** The content block will be attached to the next element in the instruction.



6.4.1.1.1.3. Side-by-side

Side-by-side: You can add text to the left of an image. Click on the title **Side-by-side**. Click on the button Next.

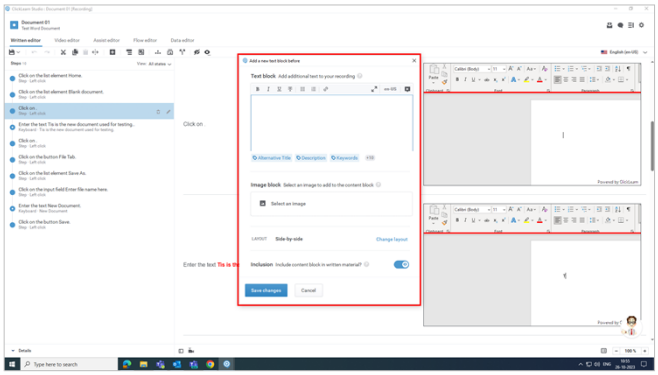


Text Block: You can type in the text you want in your text block. You can also use hyperlinks and basic editing features. You can also add variables (meta-data or variables from a captured step).

Image Block: You can select an image from the local computer or the assets in your Project.

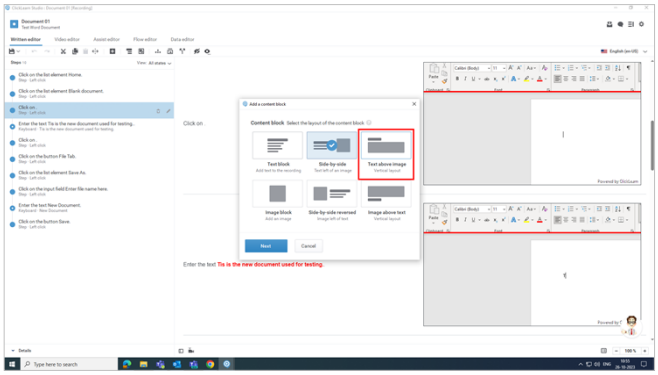
Layout: If you wish, you can change the layout directly from here.

Inclusion: The text and thumbnail of this instruction will be included/excluded from the written documentation.

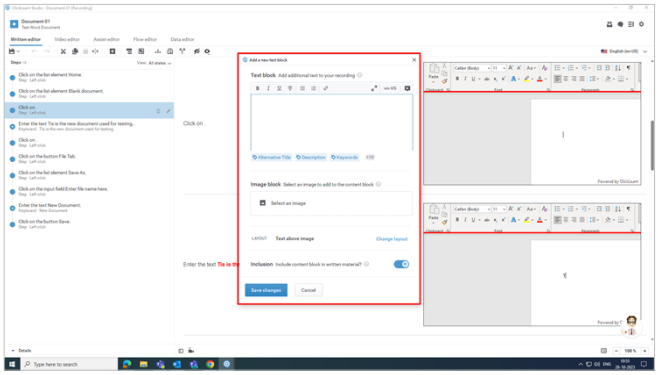


6.4.1.1.1.4. Text above image

Text above image: You can add the text above the image. Click on the title **Text above image**. Click on the button Next.



The same settings apply here, as mentioned above in the **side-by-side block**.



6.4.1.1.1.5. Image block

Image block: Image block adds an image to your recording. Click on the title **Image block**. Click on the button Next.

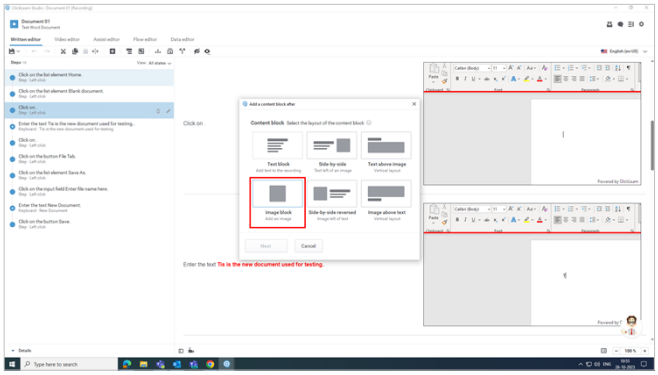
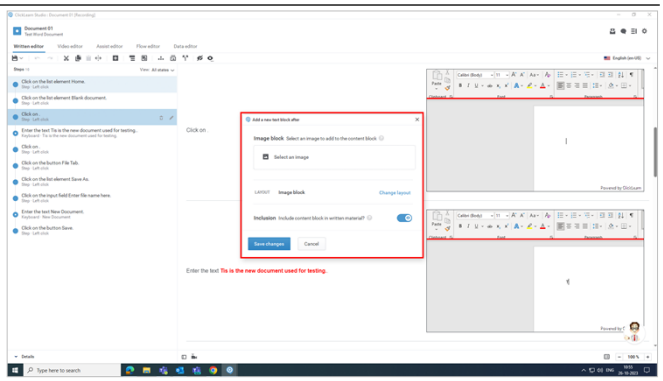


Image Block: You can select an image from the local computer or the assets in your Project.

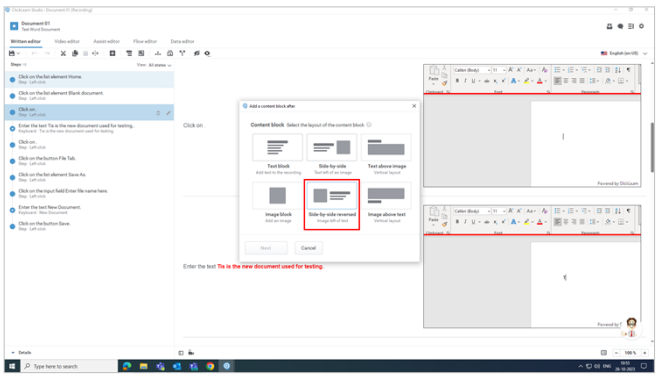
Layout: If you wish, you can change the layout directly from here.

Inclusion: The thumbnail of this instruction will be included/excluded from the written documentation.

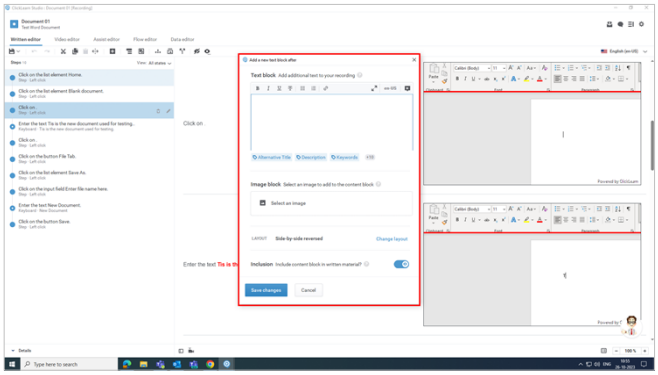


6.4.1.1.1.6. Side-by-side reversed

Side-by-side reversed: You can add text to the right of an image. Click on the title **Side-by-side reversed**. Click on the button Next.

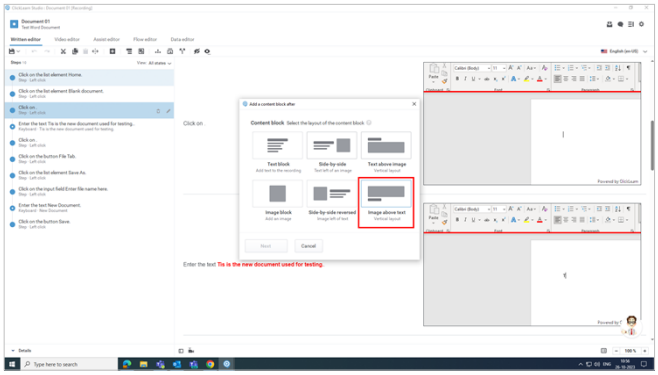


The same settings apply here, as mentioned above in the side-by-side block.

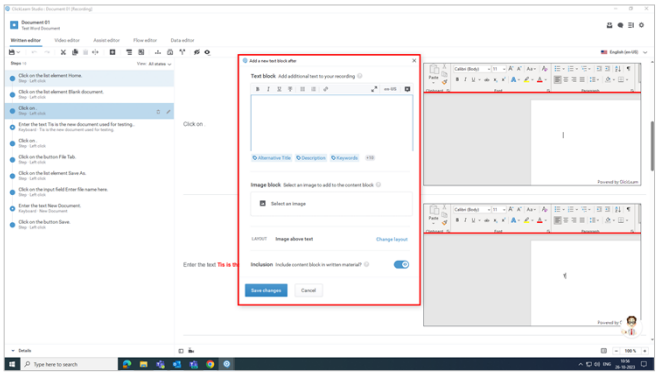


6.4.1.1.1.7. Image above text

Image above text: You can add the image above the text. Click on the title **Image above text**. Click on the button Next.



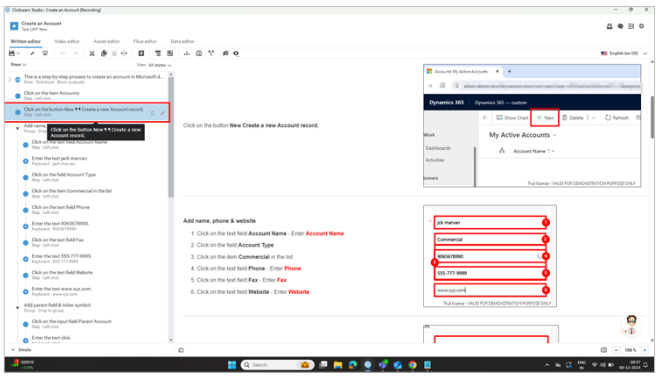
The same settings apply here, as mentioned above in the side-by-side block.



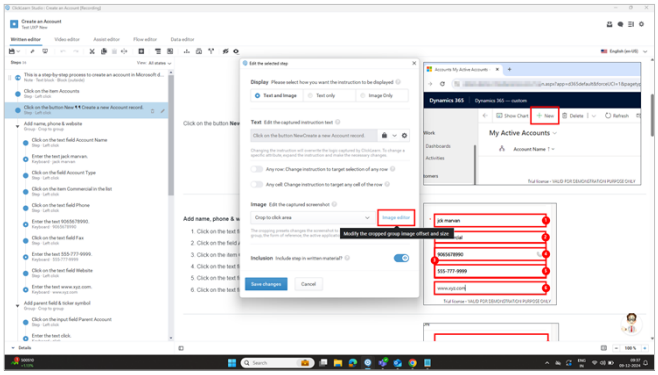
6.4.1.1.1.8. Edit the Image

This process includes using the Image Editor with two available cropping options: "**Crop to click area**" and "**Entire screen**." The "Crop to click area" option lets you crop the image to a specific area you've selected, while the "Entire screen" option captures the full screen as it is.

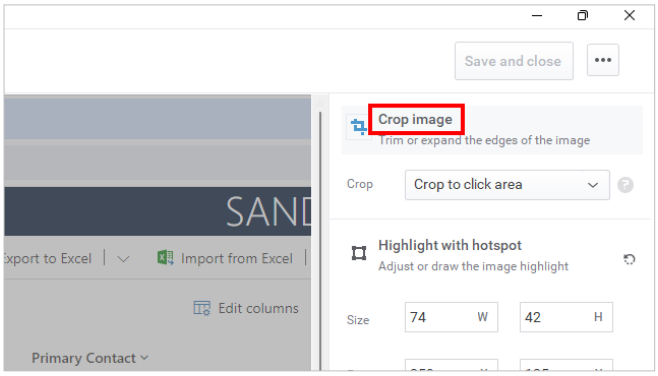
Double click on the steps **Click on the button New ¶ ¶ Create a new Account record.**



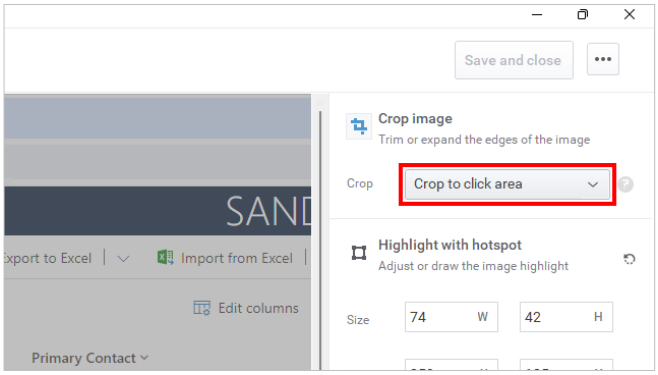
Click on the link **Image editor.**



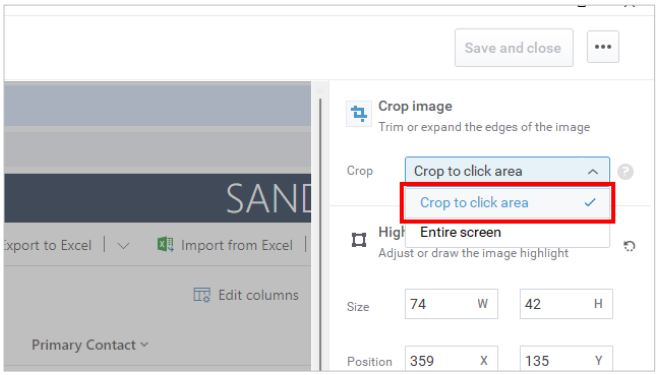
Click on the label **Crop image.**



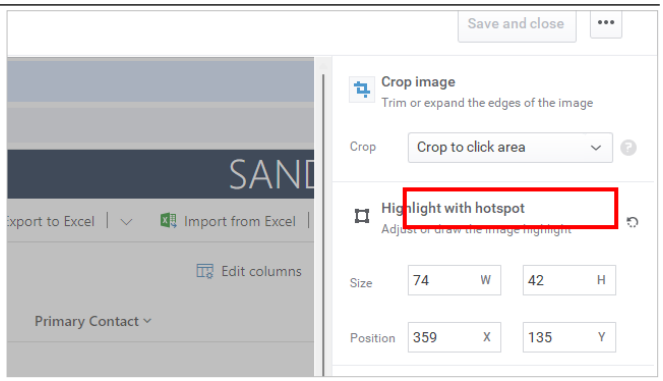
Click on the dropdown **Crop.**
In the Image Editor, there are no options for adjusting size or position when cropping the image, as only two options are available. These choices provide a straightforward way to capture either a specific area or the full screen without further customization.



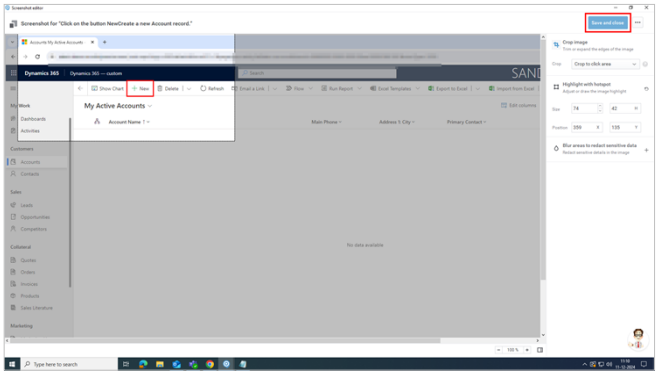
Click on the dropdown item **Crop to click area.**



Click on the dropdown item **Entire screen.**



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



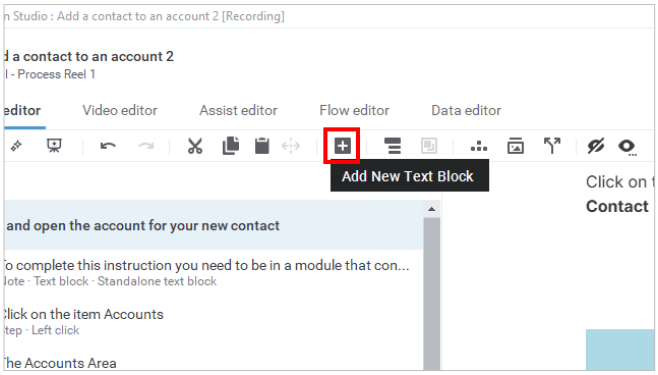
6.4.1.1.1.9. Hyperlink

The Insert **Hyperlink** dialog offers two ways to add links without typing or pasting an address: **Browse assets** and **Browse recordings**. With **Browse recordings**, you can link to another recording without publishing it first.

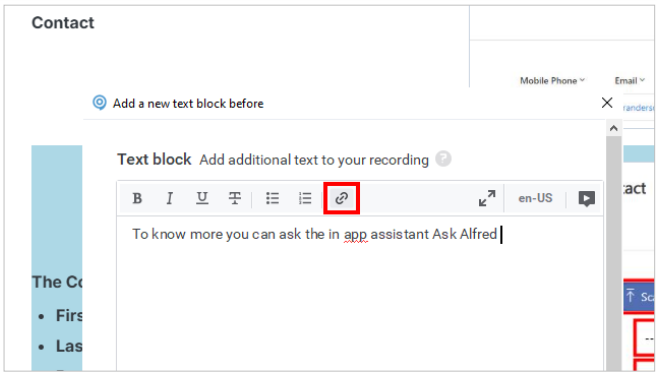
6.4.1.1.1.10. Browse Assets

Use **Browse assets** to link to a file, such as an image, instead of entering an address manually.

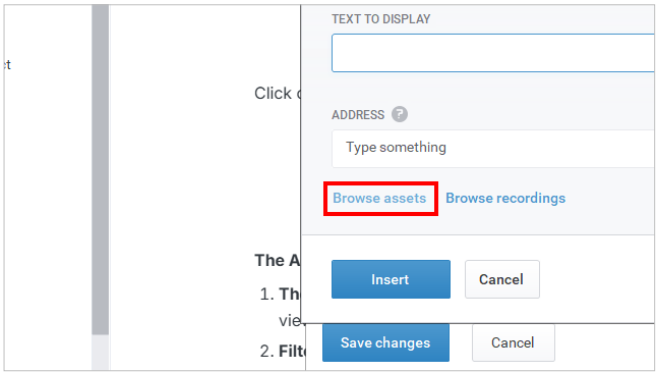
Click on the button **Add New Text Block**.



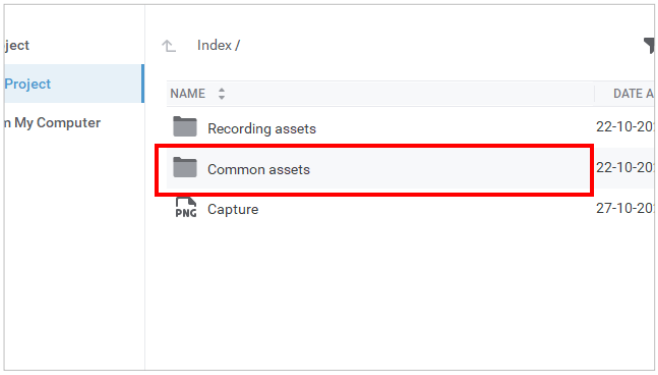
Click on the icon **Link**.



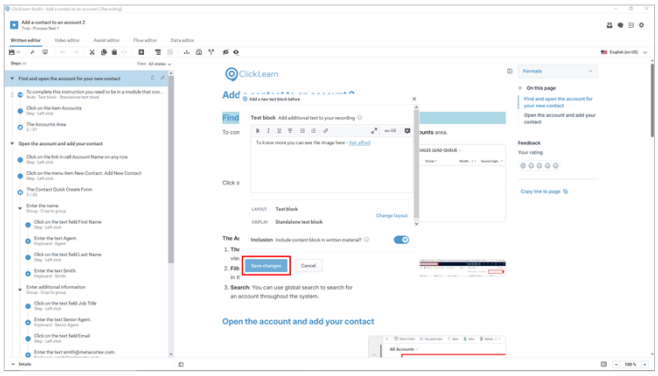
Click on the button **Browse assets**.



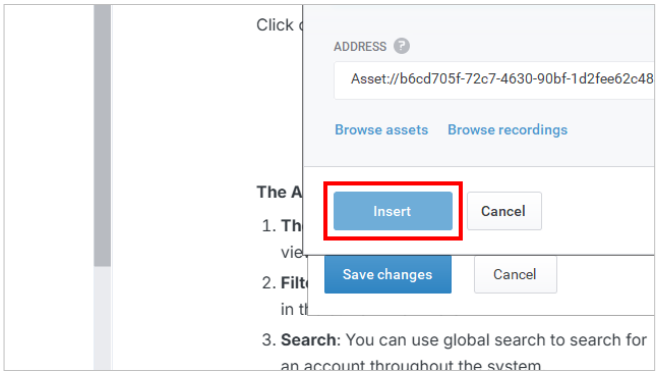
In the asset browser, **choose the asset** to be added.



Click on the button **Save changes**.



Click on the button **Insert**.



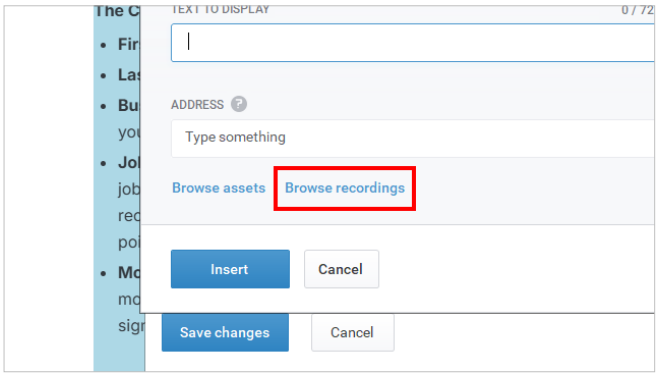
6.4.1.1.1.11. Browse Recordings

You can link one recording to another directly from the **Insert Hyperlink** dialog, without publishing the target recording first.

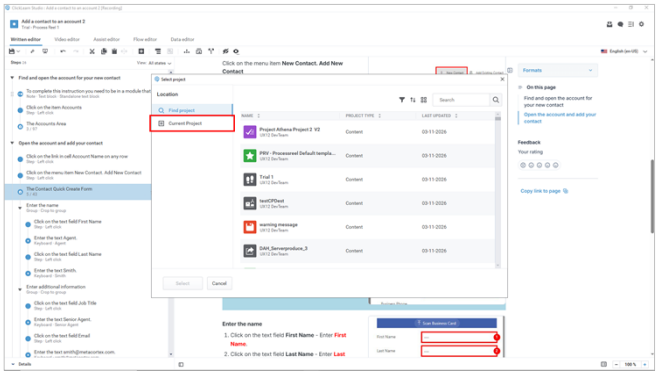
The **Browse recordings** option lets you select any recording from the current project or from another project and insert it as a link.

Note: The recording should be added to structure for this to work.

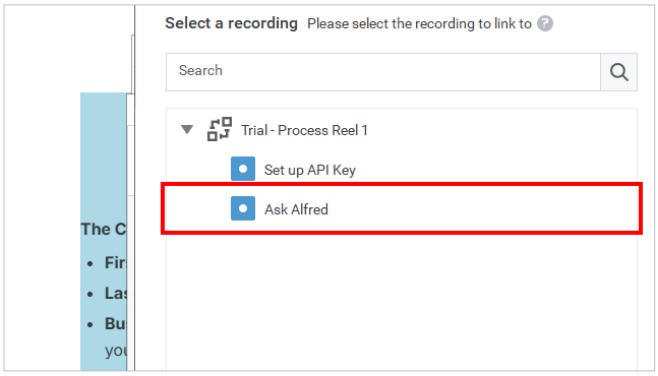
Click **Browse recordings.**



Select the project for the recording. You can select from:
- Recordings in the **current project**
- Recordings in **another project**

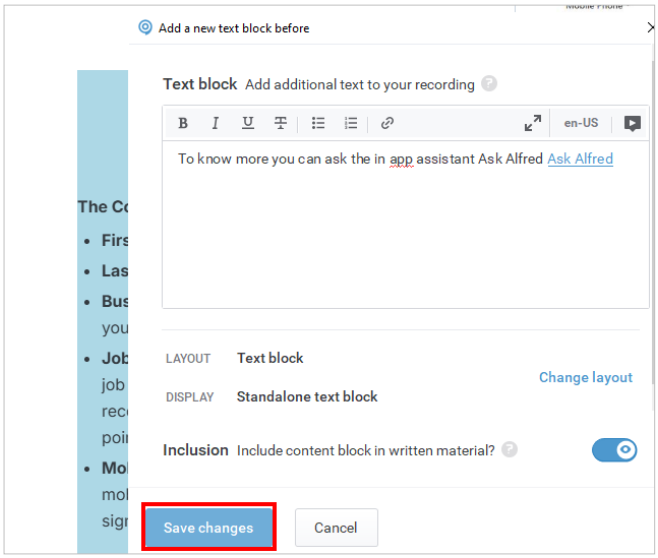


Choose the recording you want to link.



Click on the button **Select**.

Click on the button **Save changes**.

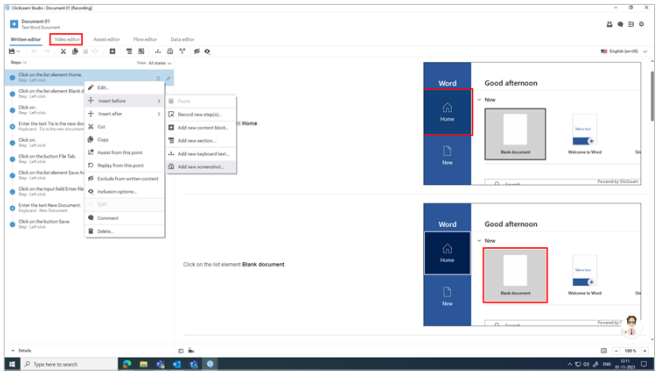


6.4.1.2. Step level Editor Elements

Fine-tune how each step appears in the video, so the final output highlights the right actions clearly.

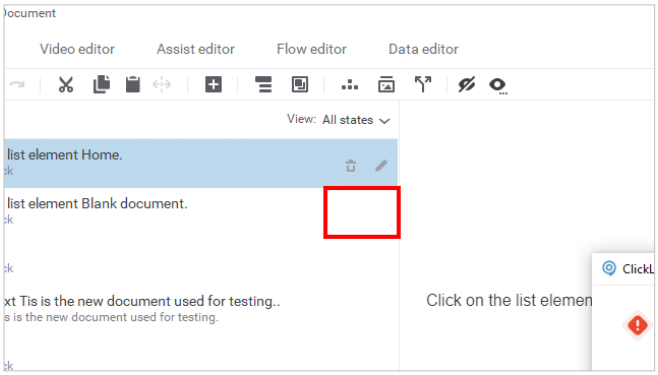
6.4.1.2.1. Introduction

Video editor allows you to customize each step according to your project requirements. Below is the description of the other elements related to each step.



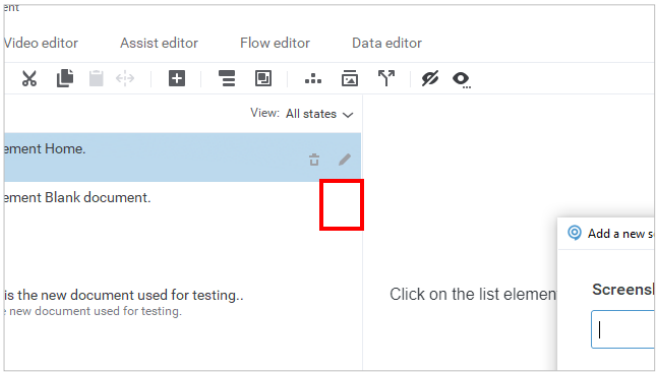
Select the step you wish to edit. The two options associated with each step are:

- **Delete:** This option deletes the selected step.
- **Edit:** You can edit the selected step.

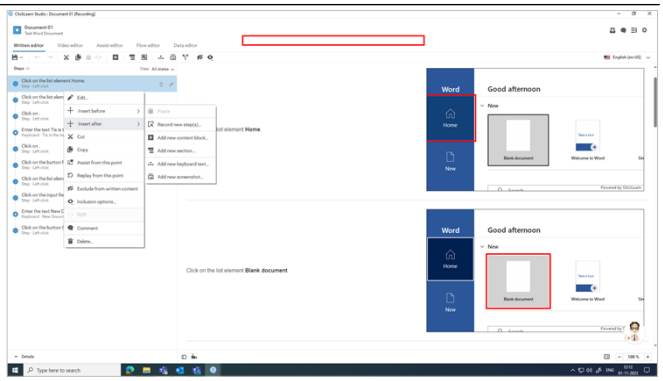


6.4.1.2.1.1. Edit

Click on the **Edit** icon of the step.

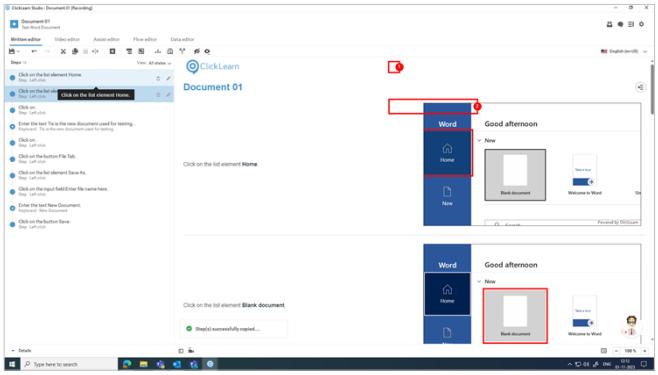


A new dialog allows you to edit the step and make the required adjustments. The other options associated with the Edit dialog box are.

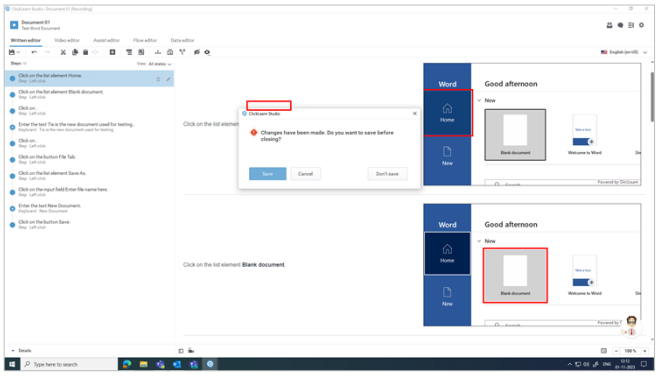


Edit

1. To edit a step, click on the drop-down **Lock option**.
2. Click on the menu item **Full editing**.

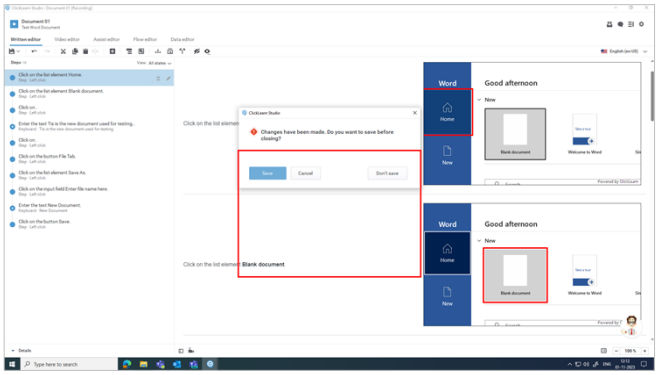


Playback mode: You can select how the steps are shown and handled in the video. Depending on your chosen option, the video will display the steps with subtitles, narration, or both.

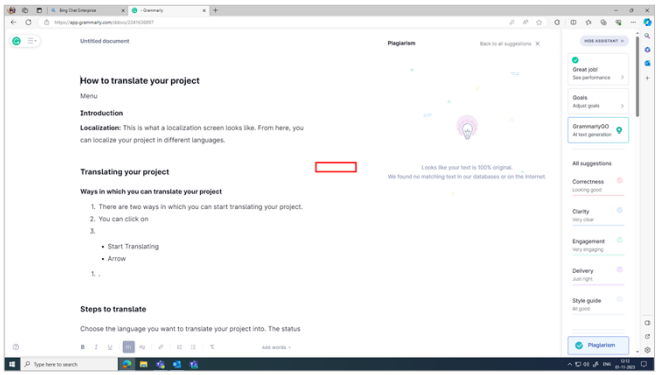


Timing: You can set your narration time with the mouse movement in the video. You can set it before, during, or after the mouse movement.

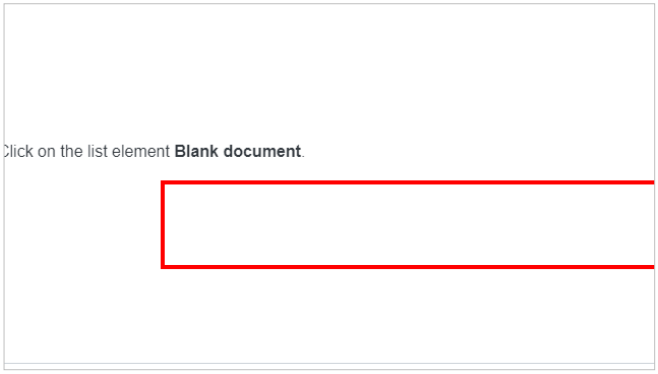
Pause before: You can pause the video for the specified number of seconds before this step. It helps you to create the right pace in the video documentation.



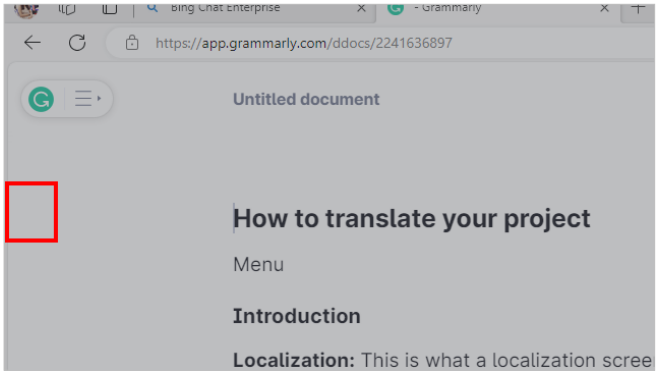
Narration options: This includes **Custom Audio.** You have two options for adding narration to your video. This allows you to upload an audio file you have already recorded or use your microphone to record your narration.



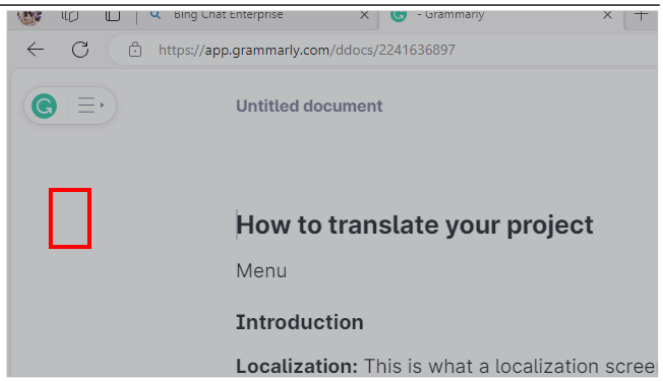
Inclusion: This will include/exclude the step in the video material.



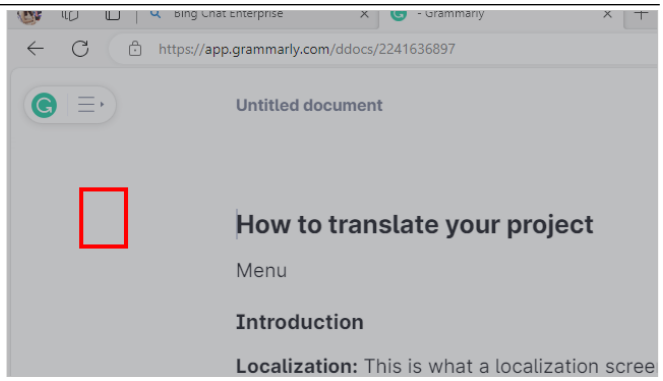
Play/Pause button: This option lets you play and pause the video preview.



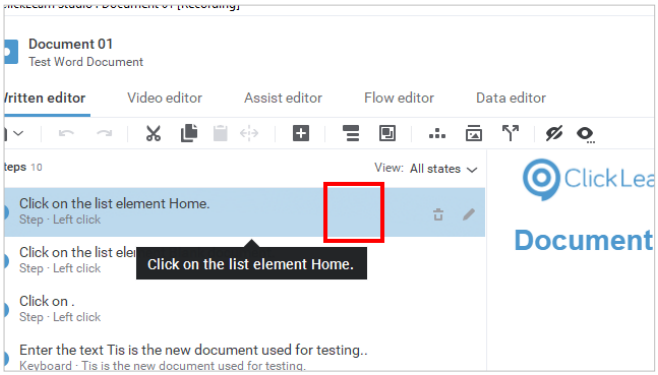
Previous: This will take you to the previous step.



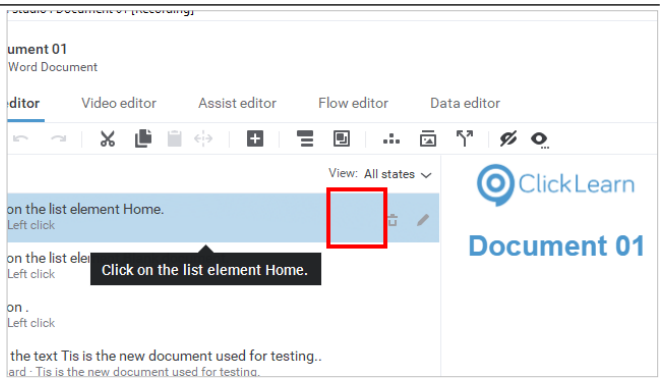
Next: This will take you to the next step.



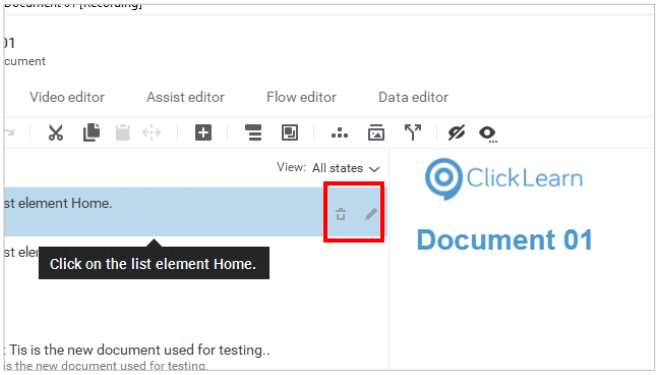
Show me: This video demonstrates the process to the end users with voice-over narration and visuals.



Try me: This video guides the end users through the process, allowing them to interact with the application, with ClickLearn Attain providing the instructions on the screen.



Test me: This video assesses the end user's knowledge of the process, challenging them to complete it themselves.



6.4.2. Edit Steps in the Video Editor

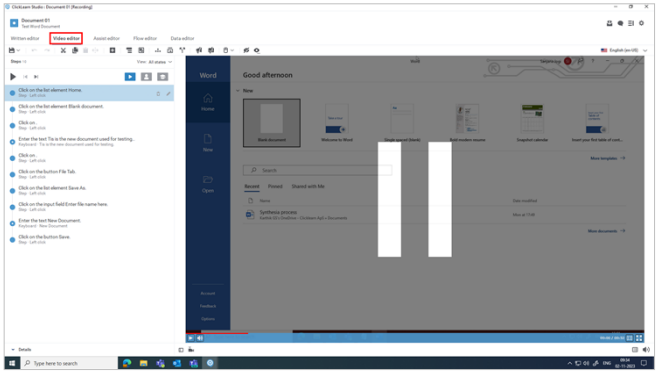
6.4.2.1. Basic elements of video editor

Understand the editor's layout and controls, so you can move confidently between recording review and refinement.

6.4.2.1.1. Video Editor

6.4.2.1.1.1. Introduction

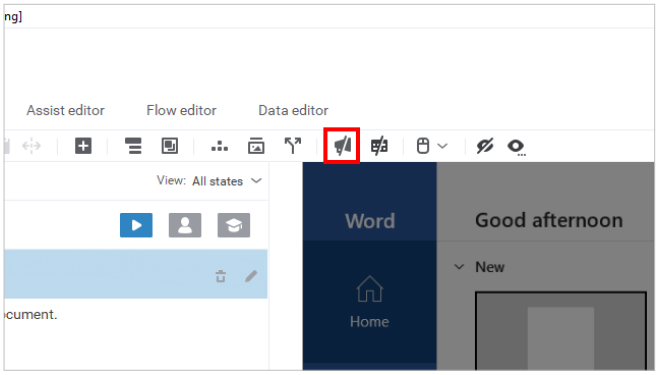
Video editor allows you to fine-tune your videos and get a preview of what they look like.



6.4.2.1.1.2. Basic elements of video editor

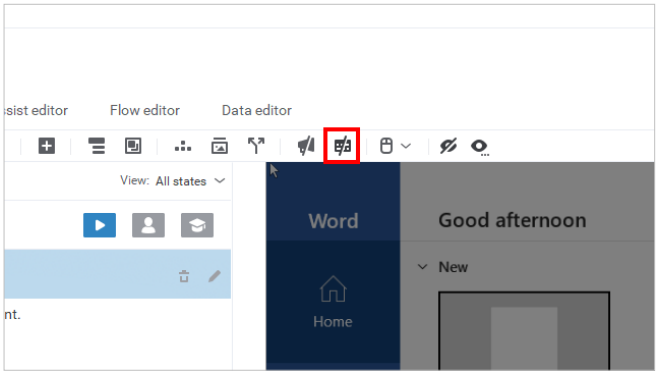
6.4.2.1.1.3. Turn on/off audio

Turn off audio: This option allows you to turn on/off the audio.



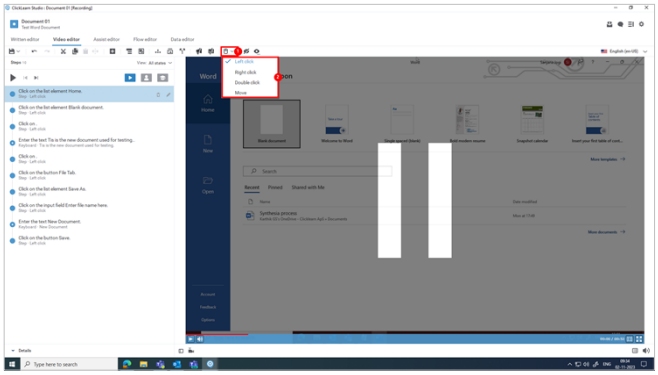
6.4.2.1.1.4. Turn on/off subtitles.

Turn off subtitles: This option allows you to turn on/off subtitles.



6.4.2.1.1.5. Mouse action

Mouse action

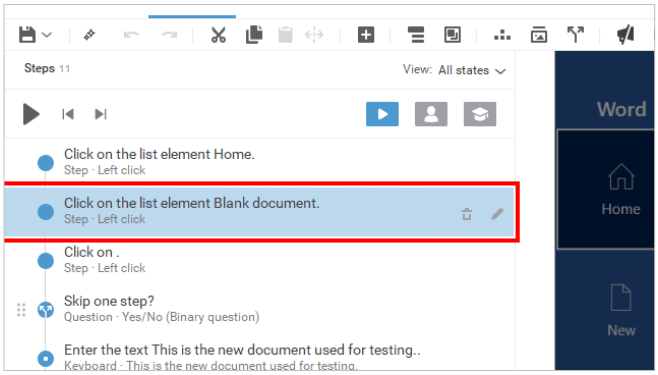


1. Mouse action is a feature that allows you to change the type of click you have used in your recording, such as left-click, right-click, double-click, or move. Click on the dropdown of **Mouse Action**.
2. Select the mouse action from the dropdown options based on your project needs. Here, the selected action is **Left click**.

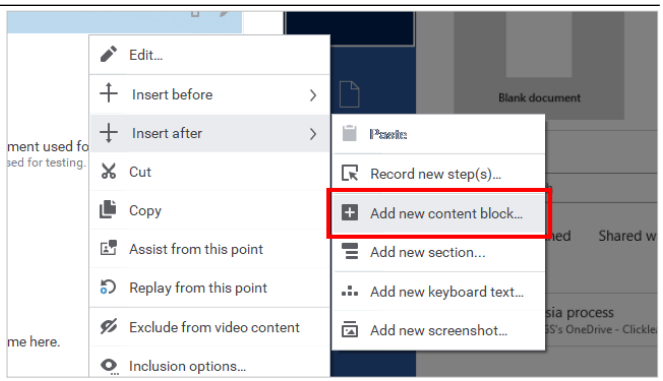
   Note: You cannot set the mouse action in the **section**.

6.4.2.1.1.6. Add a new content block.

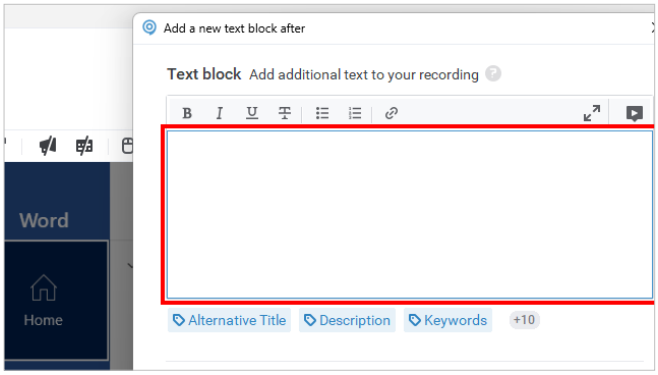
Right-click on the step: **Click on the list element Blank document**.



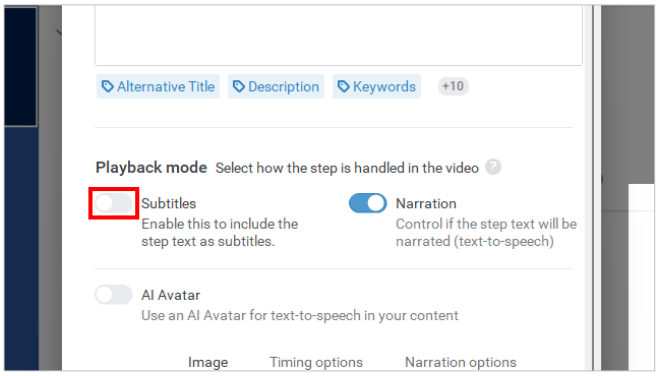
Click on the menu item: **Add new content block**.



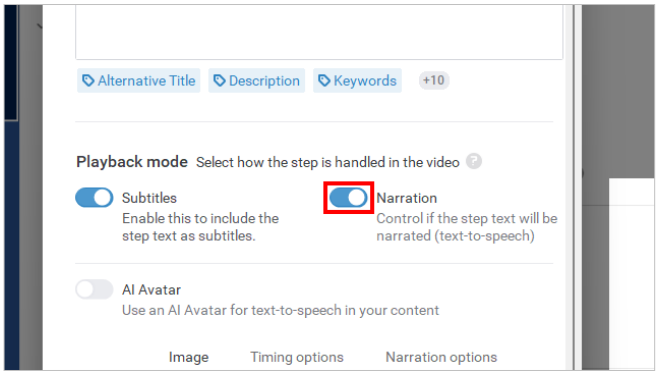
Click on the text editor **AdditionalText** to enter the text for the selected step.



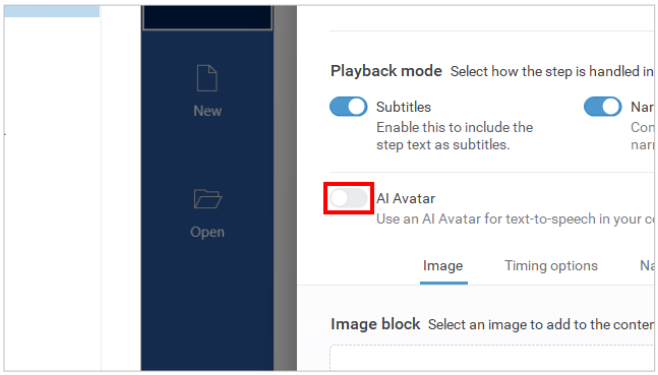
Subtitles: This includes the step text as subtitles.



Narration: This includes the narration in the video editor.



AI Avatar: This uses an AI Avatar for text-to-speech in your content.



Click on the tab item **Image**.

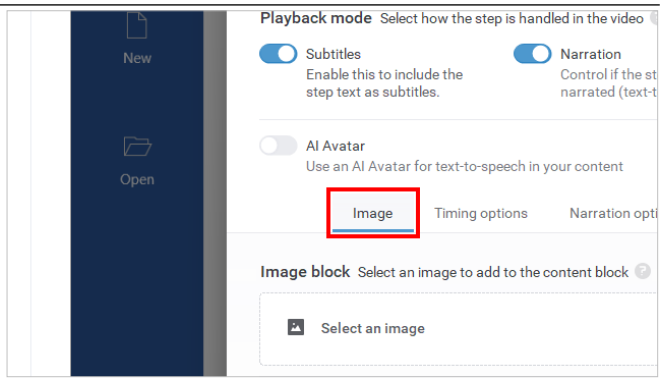


Image Selector: This feature allows you to insert an image from the existing project or the local system.

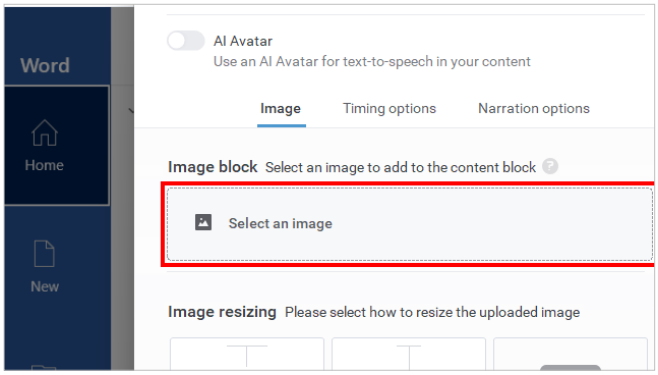
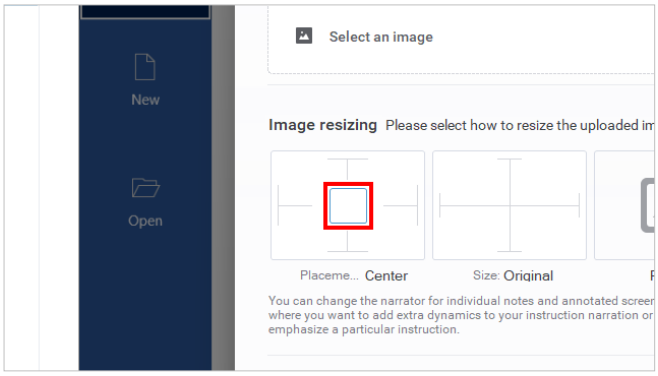
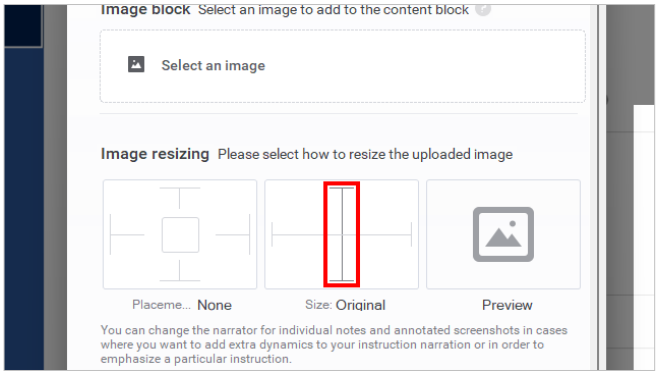


Image resizing: You can select how to resize the uploaded image.

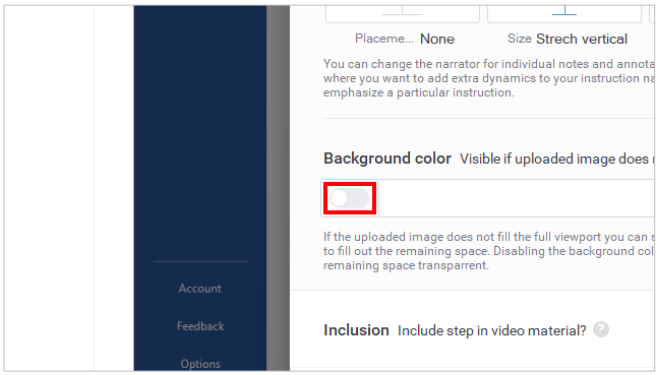
This decides the placement of the image.



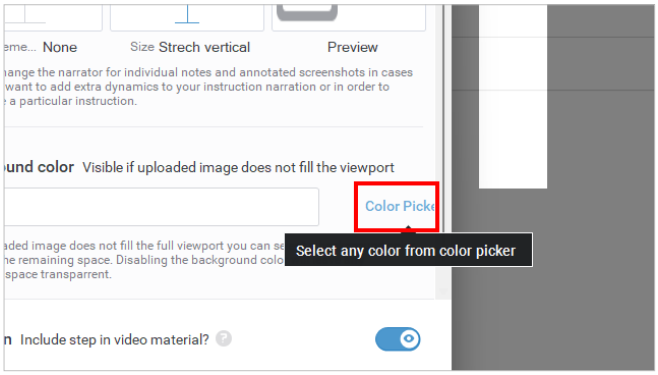
This allows you to change the size of the image.



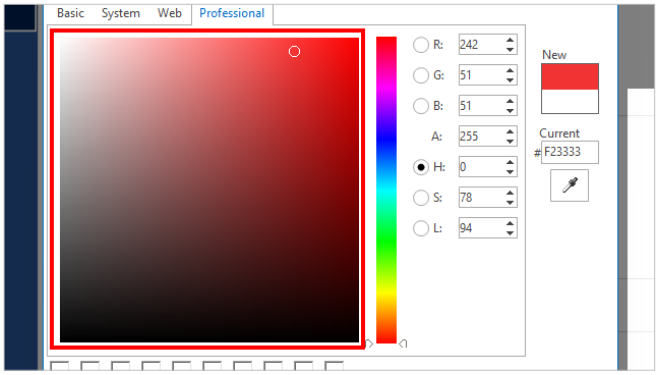
Back Color: You can choose the background color for the selected image. It is visible if the uploaded image does not fill the viewport.



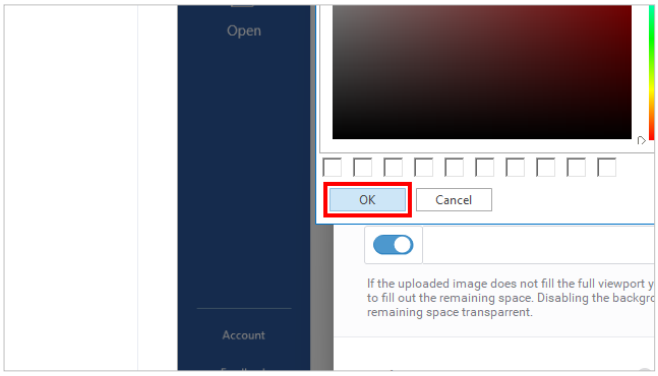
Click on the button: **Select any color from color picker**.



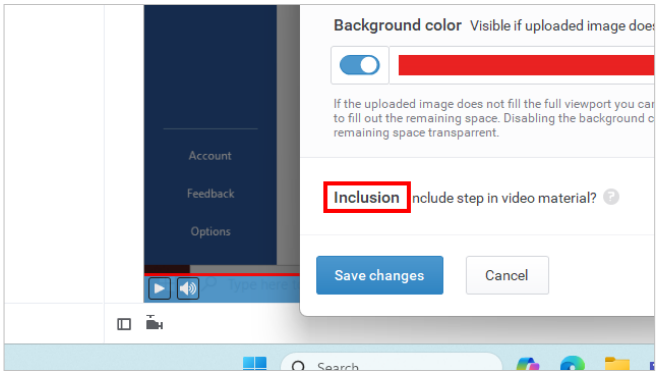
Click on the color picker.



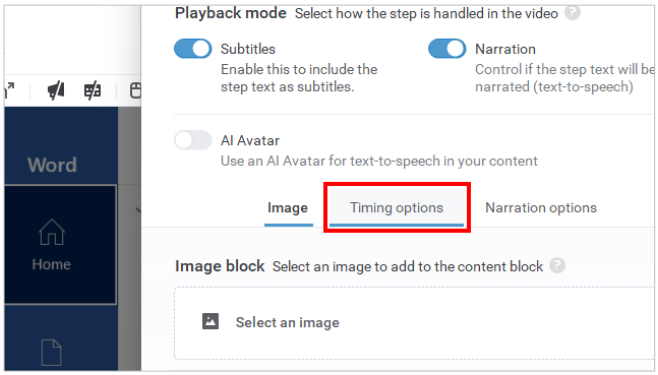
Click on the button **OK**.



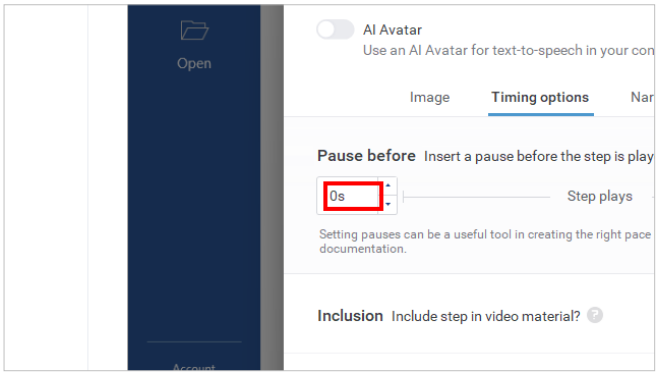
Inclusion: This will include the steps for the video editor.



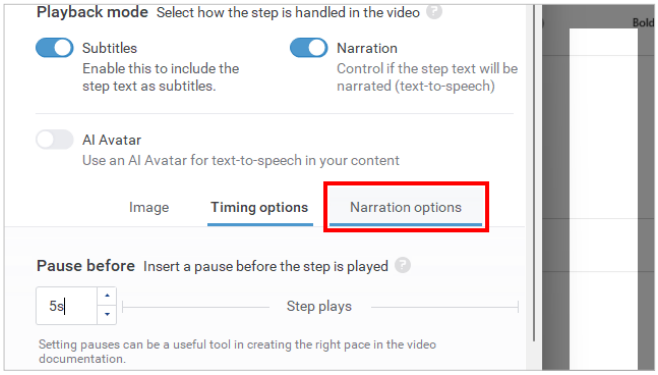
Click on the tab item **Timing options**.



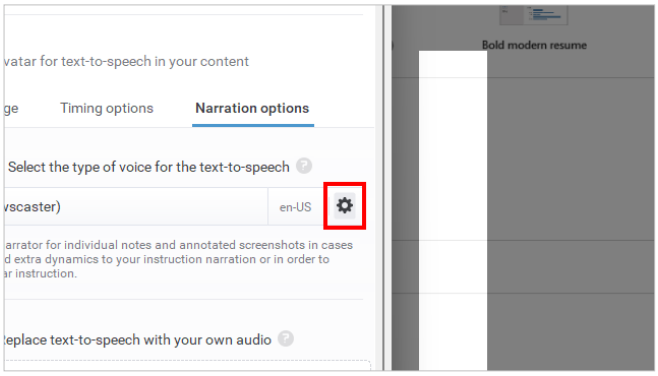
Pause before: You can enable this feature to add a delay before playing the step.



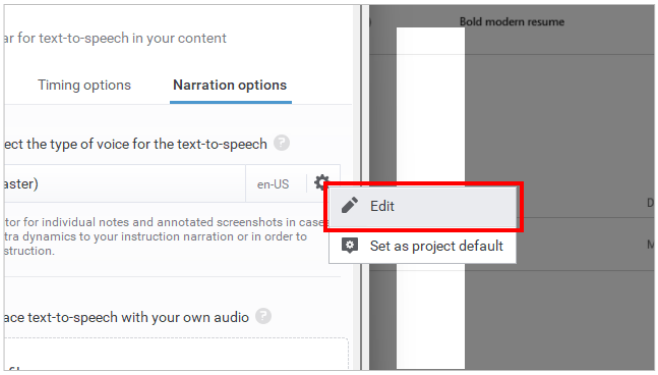
Click on the tab item **Narration options**.



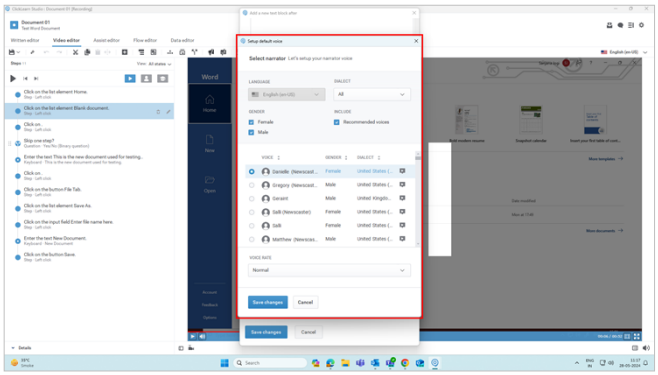
Click on the icon **Setting**.



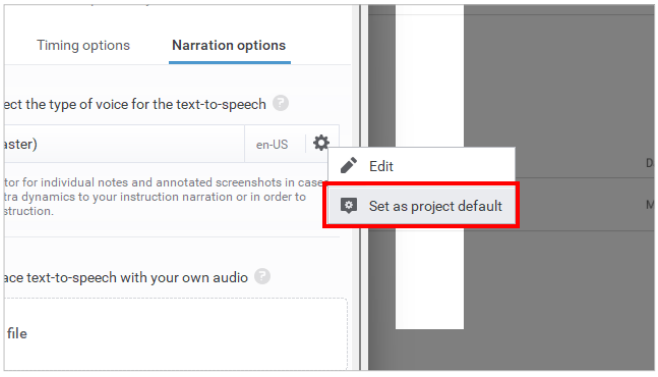
Click on the menu item **Edit**.



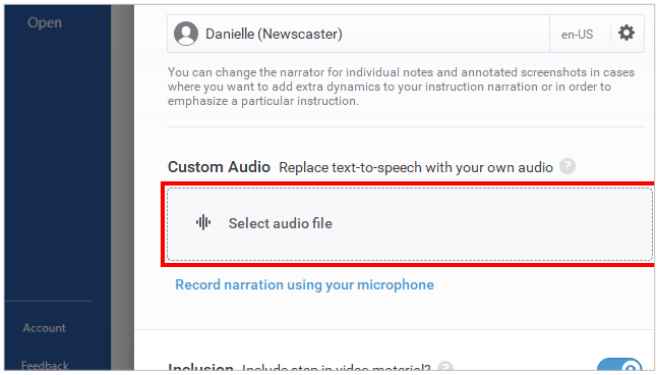
Depending on your project requirements, this dialog lets you edit and modify the narrator's voice.



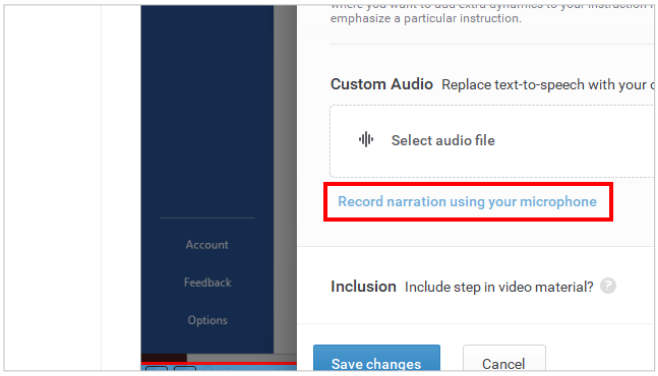
Set as project default: This sets the selected narration voice as the default project narration.



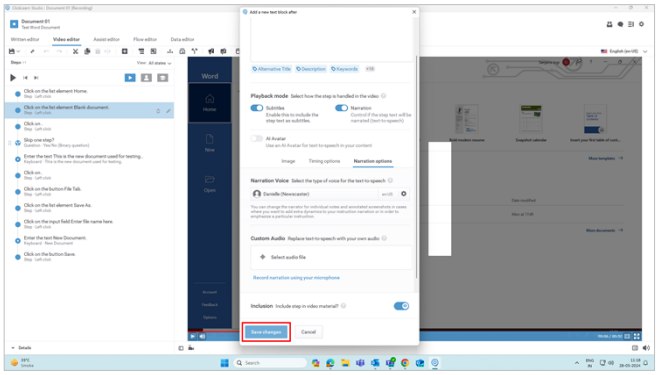
Custom Audio: You can upload custom audio from the current project or the local system.



Record narration using your microphone: This option allows you to record your voice for narration.



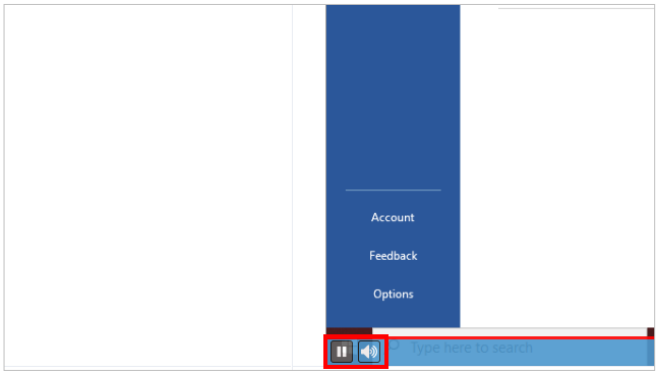
Click on the button **Save changes**.



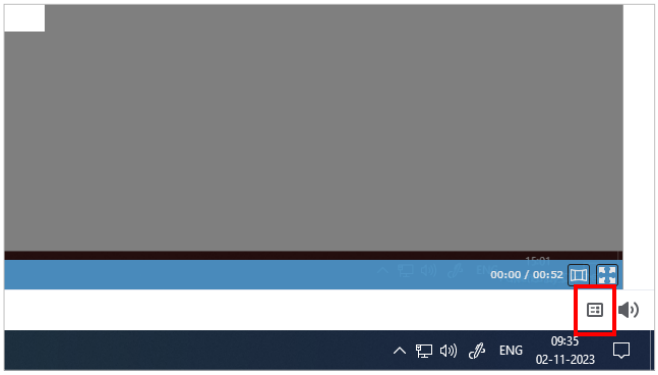
6.4.2.1.1.7. Other options

Play/Pause button: This button enables you to play and pause the video.

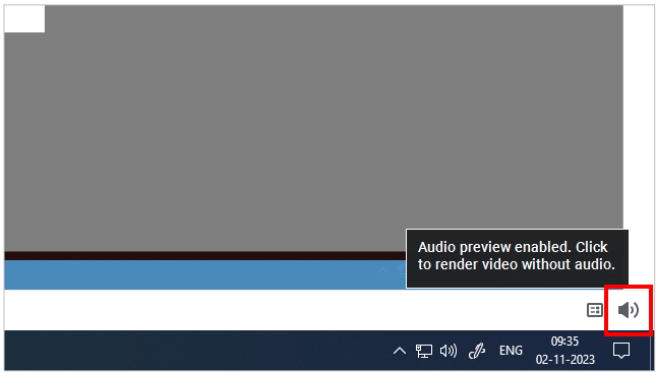
Audio: This button allows you to turn the audio on/off.



Turn preview off: This will turn the video preview on/off.



Audio preview on: This button indicates **Audio preview is enabled.** It will **render video with audio.**

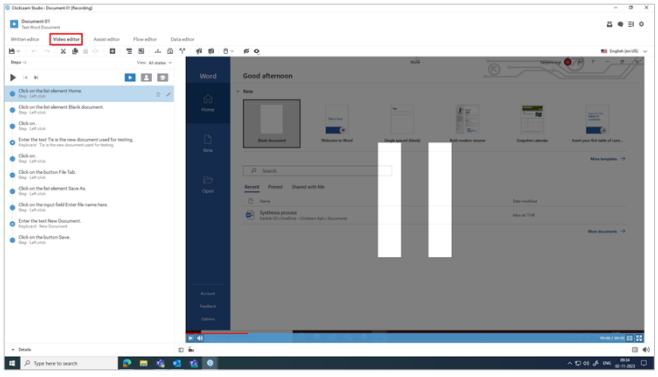


6.4.2.2. Step level Editor Elements

Fine-tune how each step appears in the video, so the final output highlights the right actions clearly.

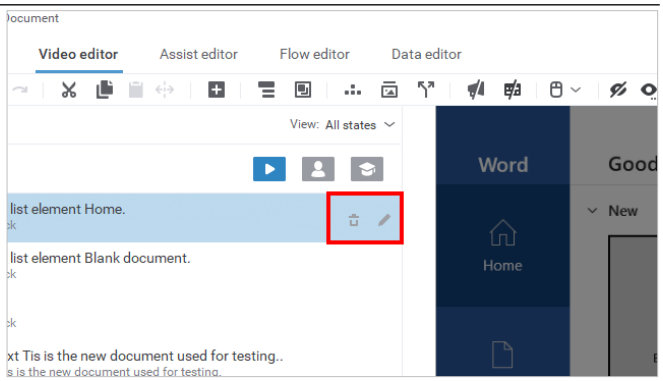
6.4.2.2.1. Introduction

Video editor allows you to customize each step according to your project requirements. Below is the description of the other elements related to each step.



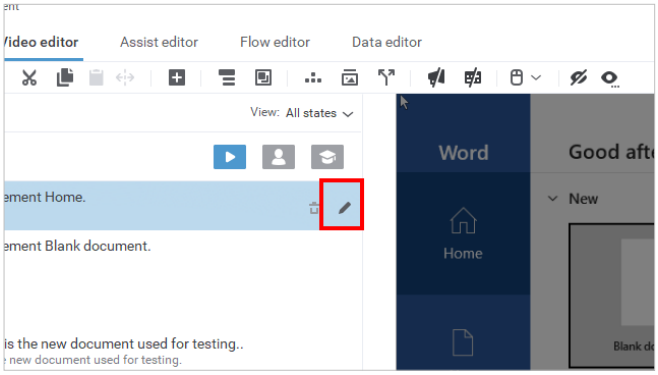
Select the step you wish to edit. The two options associated with each step are:

- **Delete:** This option deletes the selected step.
- **Edit:** You can edit the selected step.

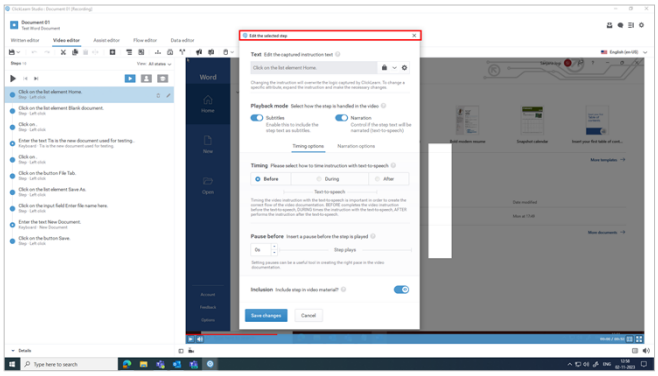


6.4.2.2.1.1. Edit

Click on the **Edit** icon of the step.

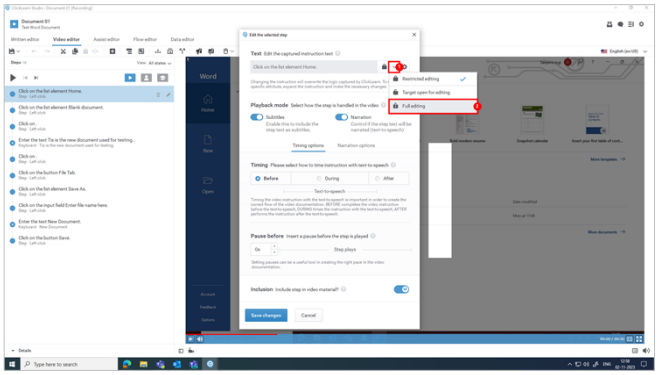


A new dialog allows you to edit the step and make the required adjustments. The other options associated with the Edit dialog box are.

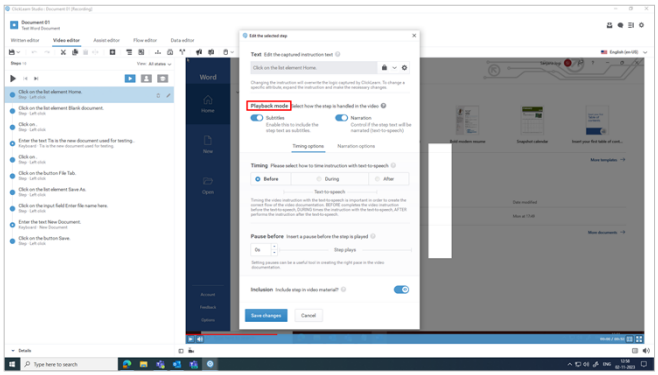


Edit

1. To edit a step, click on the drop-down **Lock option**.
2. Click on the menu item **Full editing**.

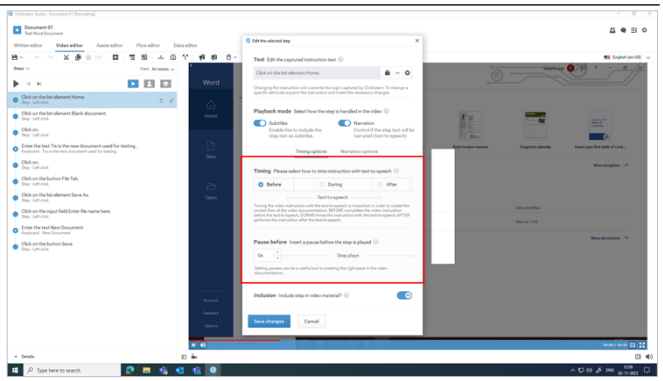


Playback mode: You can select how the steps are shown and handled in the video. Depending on your chosen option, the video will display the steps with subtitles, narration, or both.

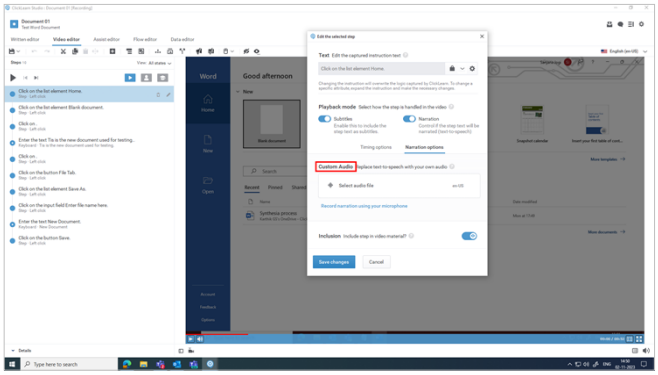


Timing: You can set your narration time with the mouse movement in the video. You can set it before, during, or after the mouse movement.

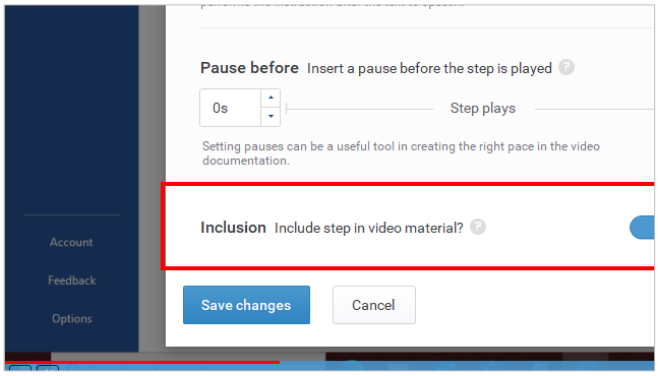
Pause before: You can pause the video for the specified number of seconds before this step. It helps you to create the right pace in the video documentation.



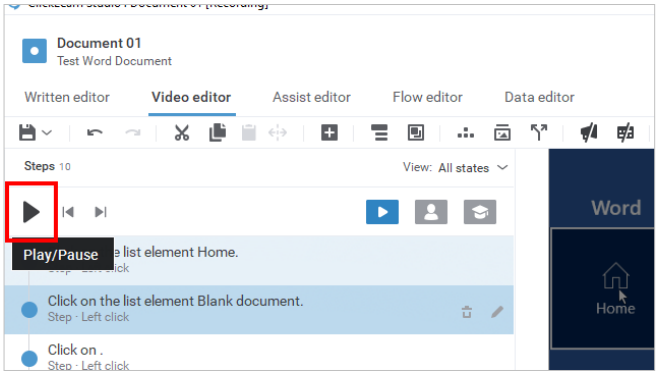
Narration options: This includes **Custom Audio.** You have two options for adding narration to your video. This allows you to upload an audio file you have already recorded or use your microphone to record your narration.



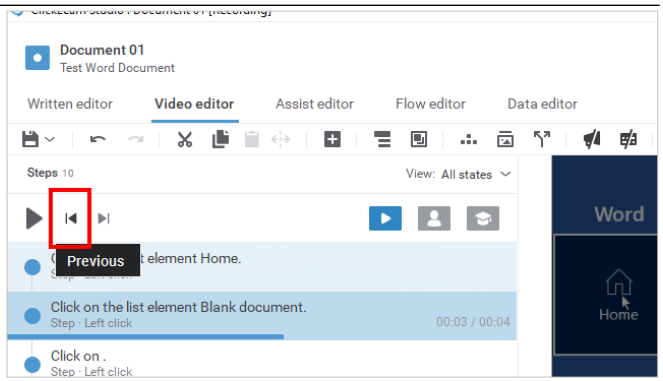
Inclusion: This will include/exclude the step in the video material.



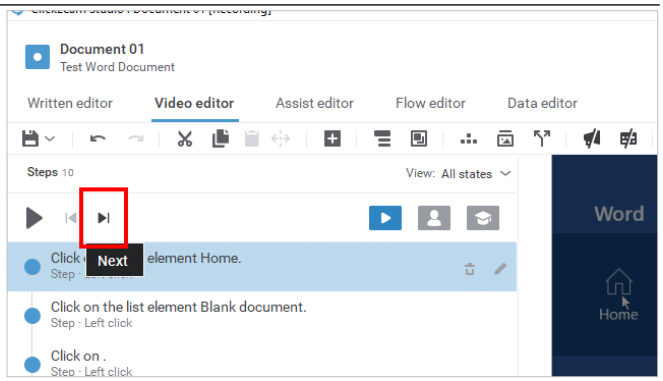
Play/Pause button: This option lets you play and pause the video preview.



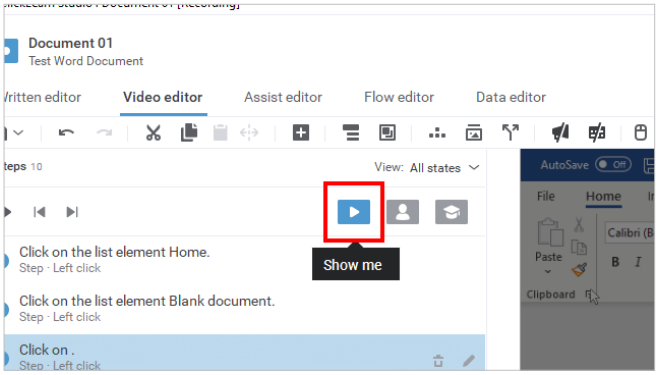
Previous: This will take you to the previous step.



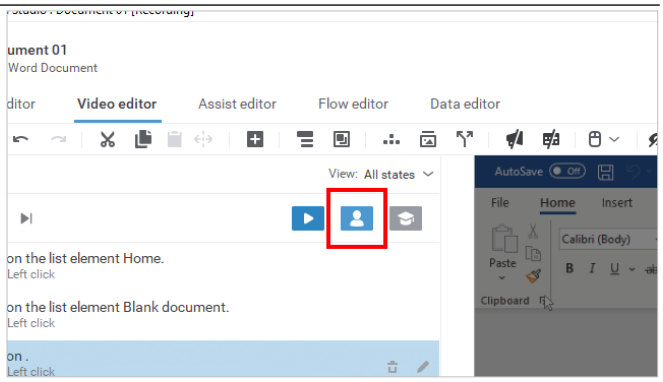
Next: This will take you to the next step.



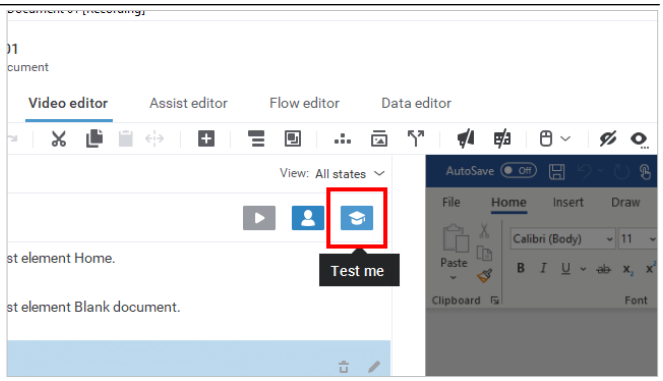
Show me: This video demonstrates the process to the end users with voice-over narration and visuals.



Try me: This video guides the end users through the process, allowing them to interact with the application, with ClickLearn Attain providing the instructions on the screen.



Test me: This video assesses the end user's knowledge of the process, challenging them to complete it themselves.



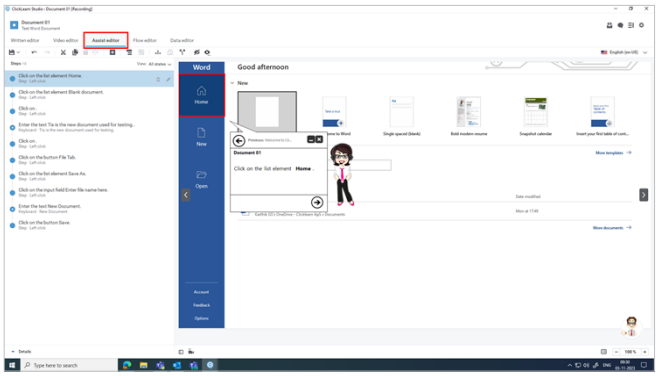
6.4.3. Set Up In-App Guidance with the Assist Editor

6.4.3.1. Assist Editor

Configure how ClickLearn Assist guides users through a process step-by-step inside the application, so users get help exactly where they need it, without leaving the screen.

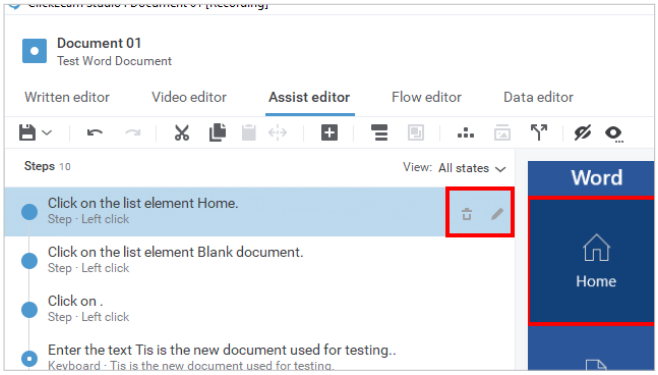
6.4.3.1.1. Introduction

Assist editor allows you to customize the content and settings of the assist experience for your recordings.



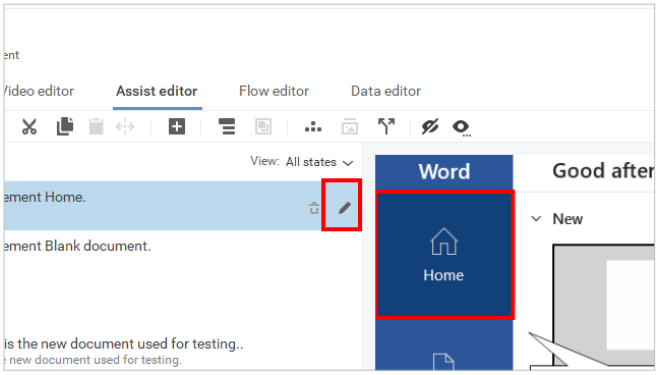
Select the step you wish to edit. The two options associated with each step are:

- **Delete:** This option deletes the selected step.
- **Edit:** You can edit the selected step.

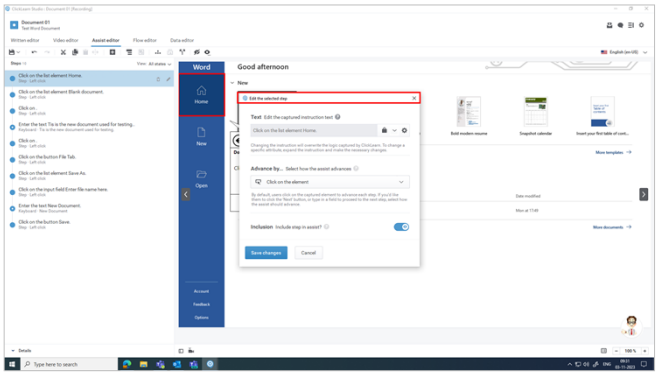


6.4.3.1.1.1. Edit

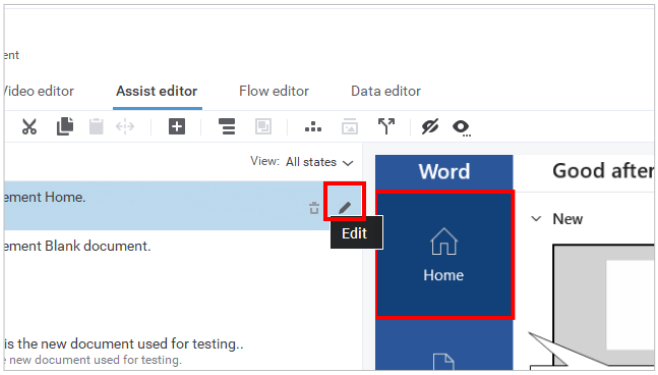
Click on the **Edit** icon of the step.



A new dialog allows you to edit the step and make the required adjustments. The other options associated with the edit dialog box are.

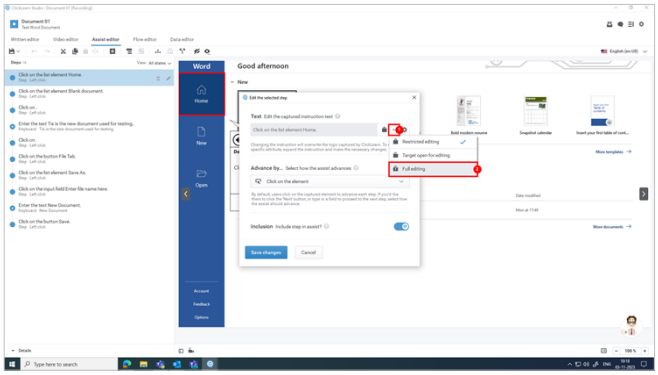


Click on the **Edit** icon of the step.



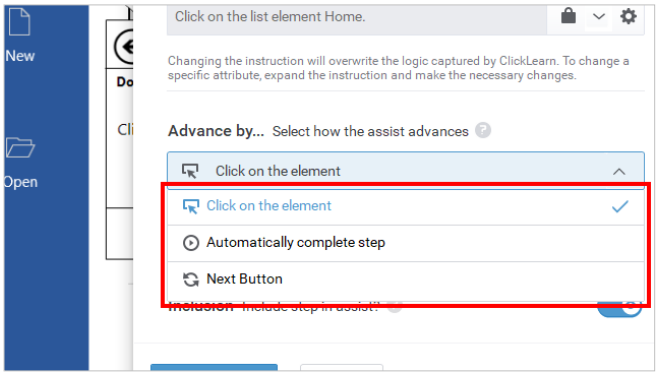
Edit

1. To edit a step, click on the drop-down **Lock option**.
2. Click on the menu item **Full editing**.

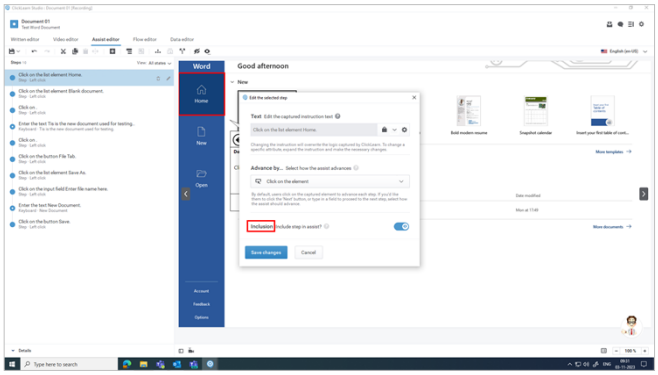


Advance by: This controls how the assist will advance from one step to the next. You can choose from the available three options.

- Click on the element.
- Automatically complete step.
- Next Button.



Inclusion: This will include/exclude the step in the assist editor.



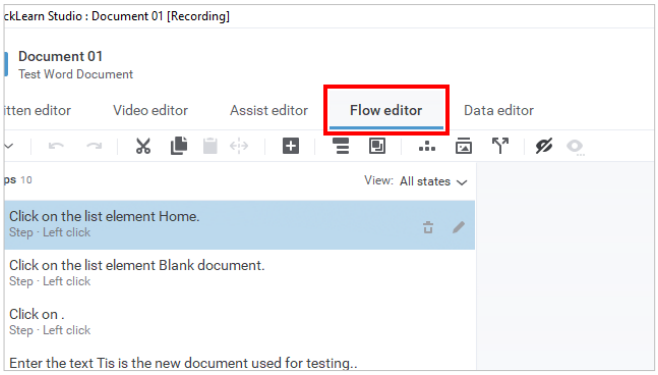
6.4.4. Build Decision Flows with the Flow Editor

6.4.4.1. Flow Editor

Personalize the recording path for each user, so everyone sees only the steps relevant to them.

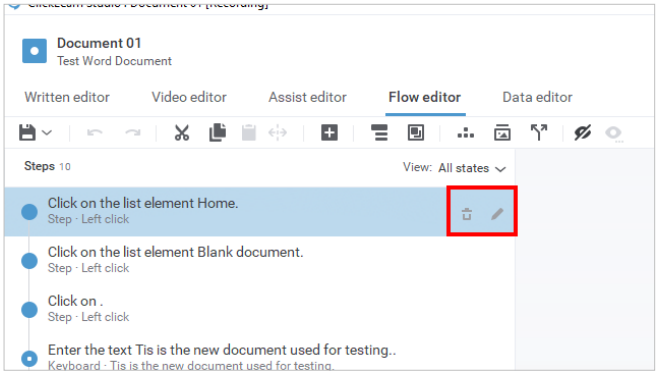
6.4.4.1.1. Introduction

With **Flow editor**, you can add questions in your recordings that redirect users to specific steps based on the selected answer.

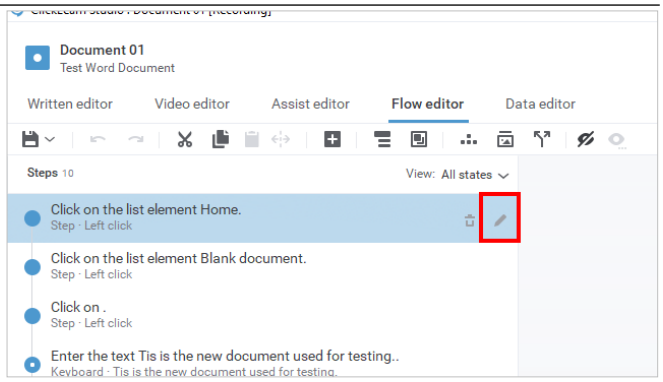


Select the step you wish to edit. The two options associated with each step are:

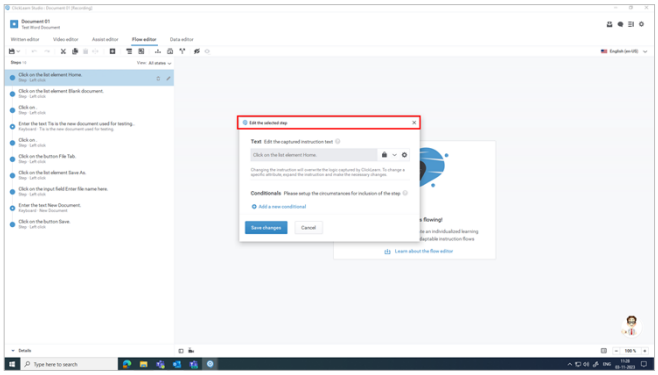
- **Delete:** This option deletes the selected step.
- **Edit:** You can edit the selected step.



Click on the **Edit** icon of the step.

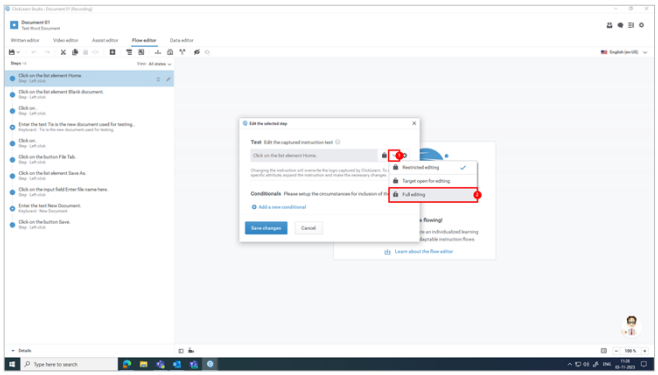


A new dialog allows you to edit the step and make the required adjustments. The other options associated with the edit dialog box are.

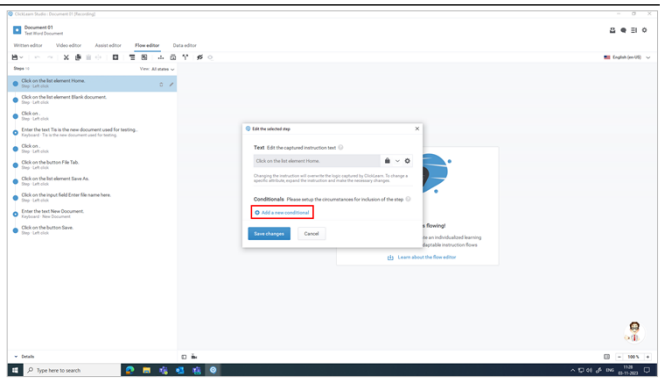


Edit

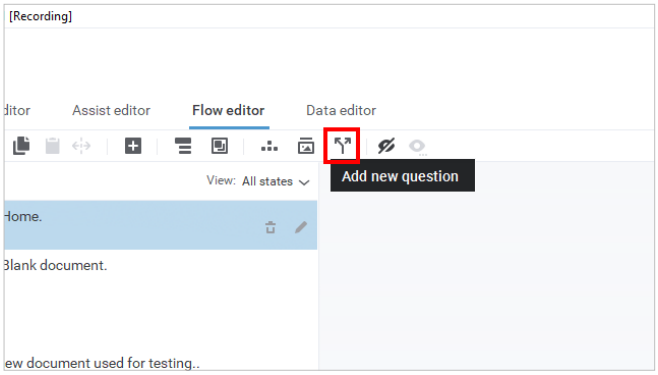
1. To edit a step, click on the drop-down **Lock option**.
2. Click on the menu item **Full editing**.



Add a new conditional: You can define a condition for the selected step.



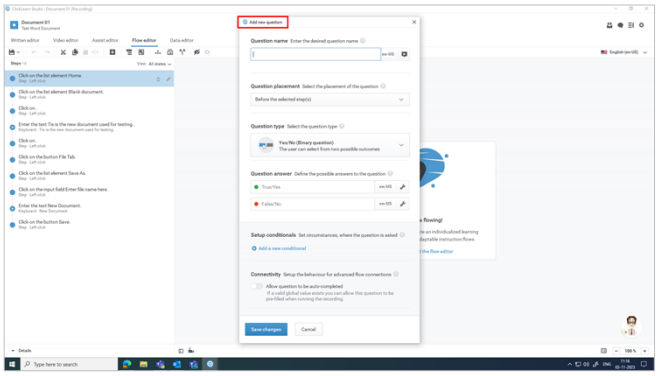
To add a question to your recording, click the **Add new question** button.



Question name: Enter the text for your question.

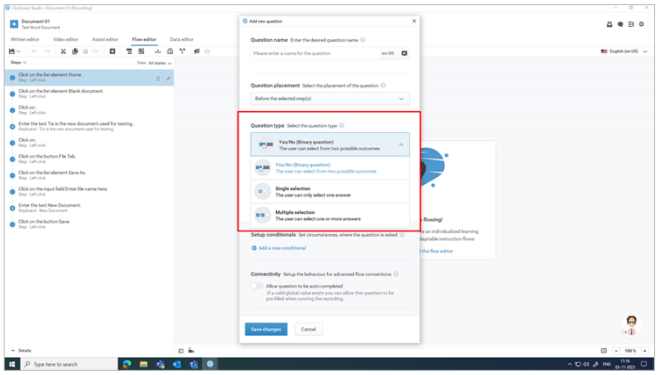
Question placement: You can select where you want to locate your question. There are three available options you can choose from.

- Before the selected step.
- At the beginning of the current section.
- At the beginning of the recording.

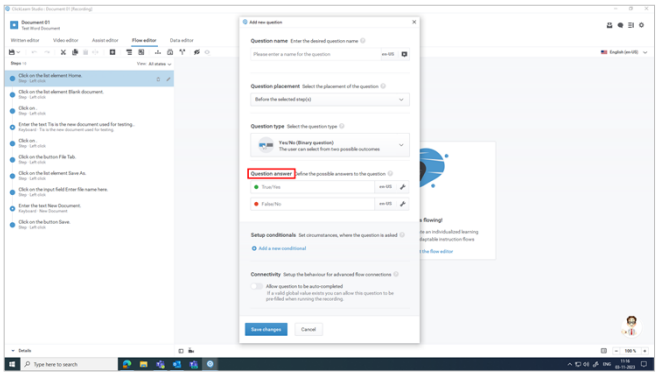


Question type: You can select the question you will ask the end user. There are three available options to choose from.

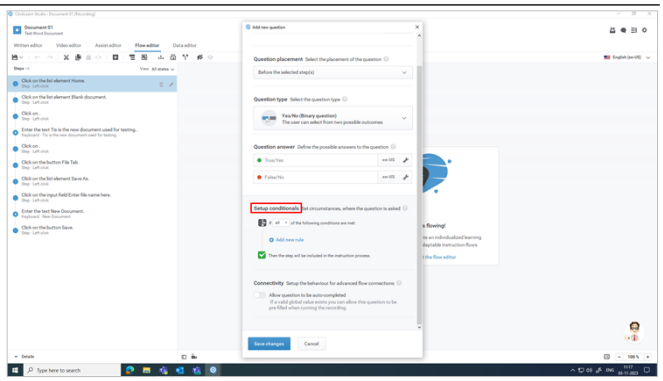
- Yes/No (Binary question)
- Single selection
- Multiple selection



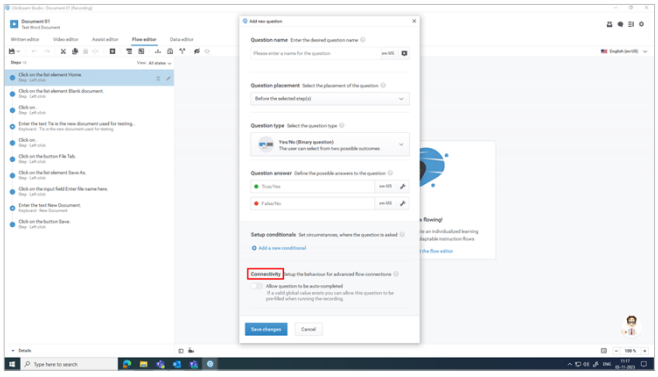
Question answer: Depending on the question type you select, you can set up the answers to your questions.



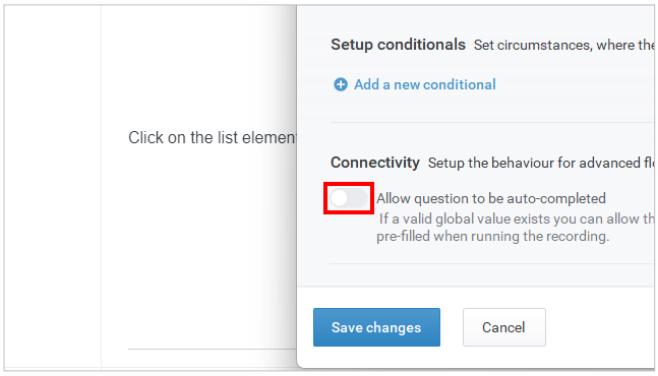
Setup conditionals: You can set up the conditions for your questions.



Connectivity: You can set up the behaviour for advanced flow connections.



Click on the toggle switch: **Allow questions to be autocompleted.** If a valid global value exists, you can allow this question to be pre-filled when running the recording.

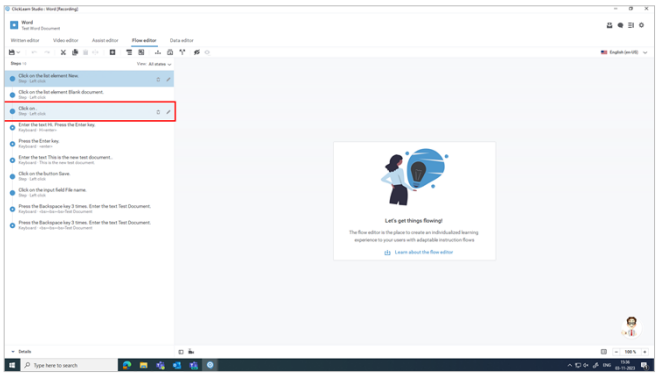


6.4.4.2. Setting up the flow

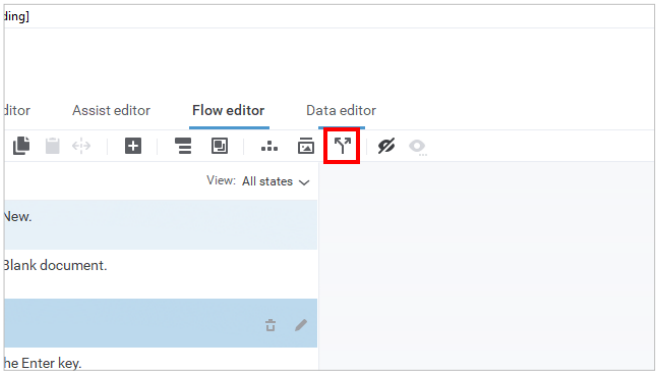
Test your branching logic before publishing, by simulating how each answer path plays out, so you catch errors before end users ever see them.

6.4.4.2.1. Introduction

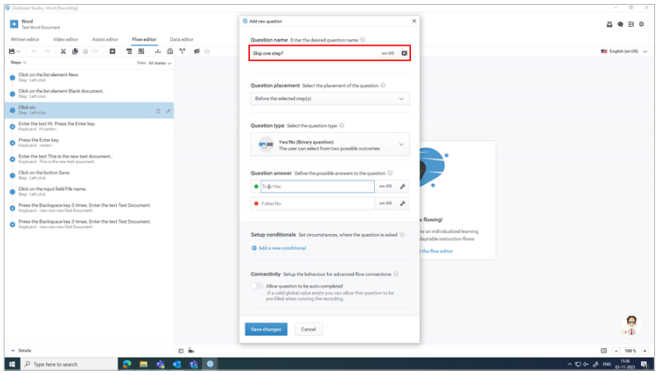
This is what the screen looks like when using the **Flow editor** for the first time.



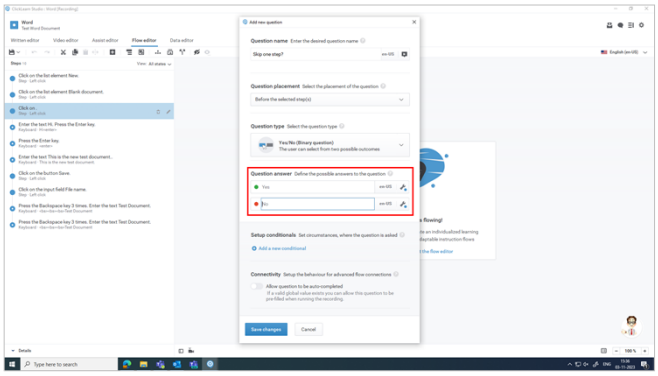
Select the step to add the question and click the **Add new question** button.



Enter the question you wish to ask the end user. Click on the input textbox **Question name** and enter text: **Skip one step?**

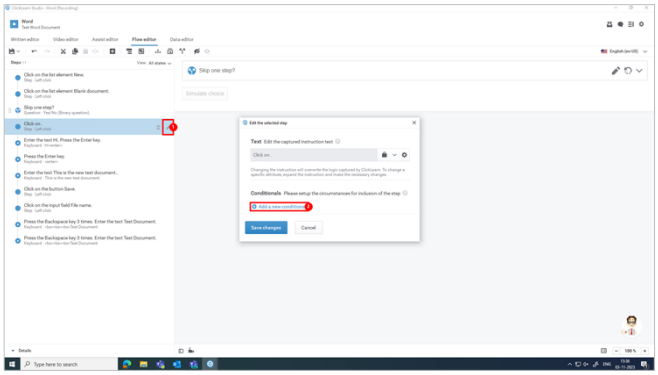


Select yes and no in the question-answer section and click save changes.

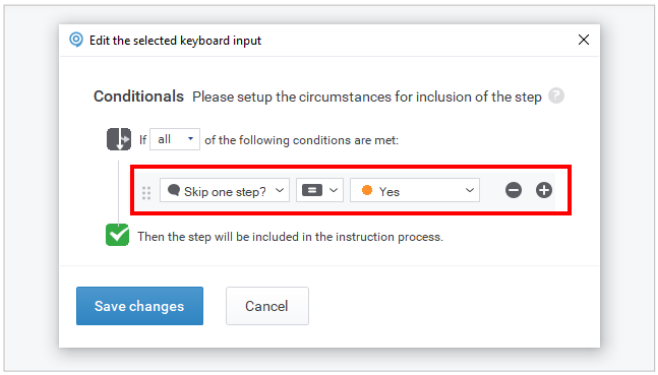


Add condition

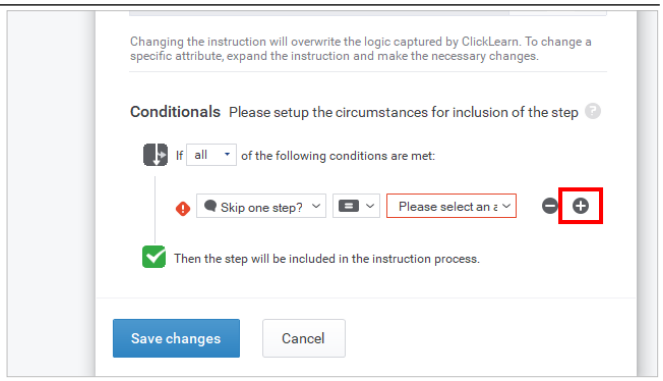
1. Click the **Edit** icon next to the step where you need to add a condition.
2. Click on the label **Add a new conditional** and click on **Add new rule**.



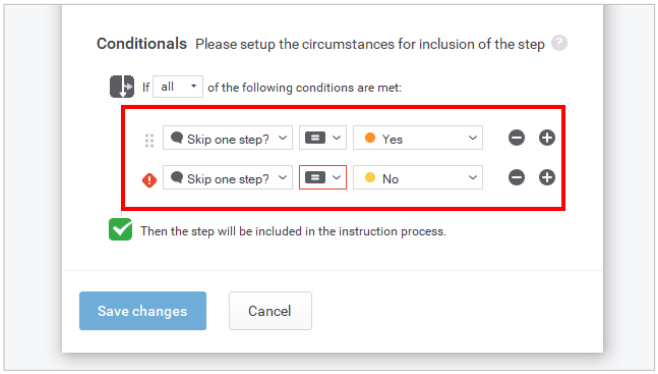
- Select **all** or **any** of the steps to be included.
- Select the question.
- Select the operator.
- Select the answer.
- Add another condition if needed.
- Click on the save changes.



The **Plus** (+) icon helps you to add more conditions.

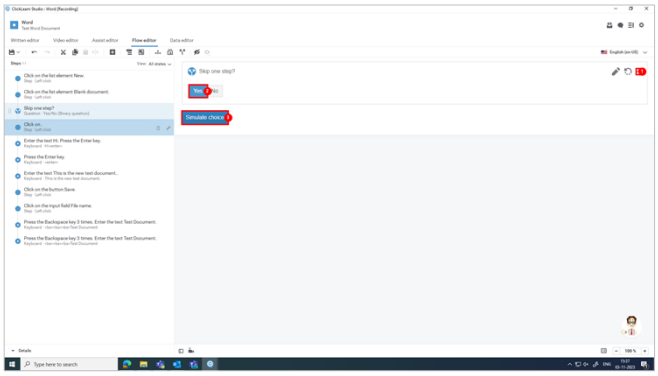


In our case, we have added two conditions. Click on save changes.



Simulating the flow

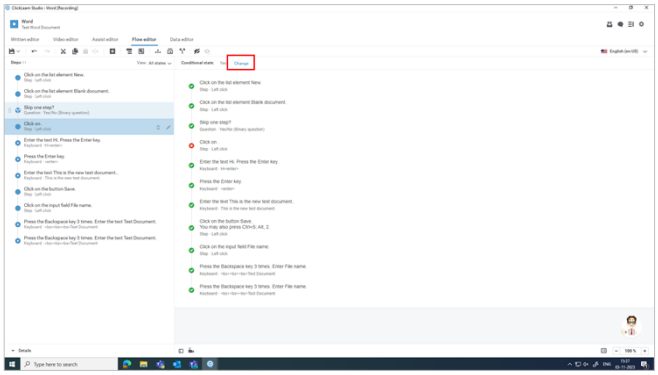
1. Click on the drop-down arrow to expand the question to simulate the flow.
2. Select the answers for which you need to simulate the flow.
3. Click on the button **Simulate choice**.



The screen looks like this when you click the simulate choice button.

The green icons represent the included steps, and the red icons represent the excluded steps in the flow.

You can click the **Change** button to change the simulation.



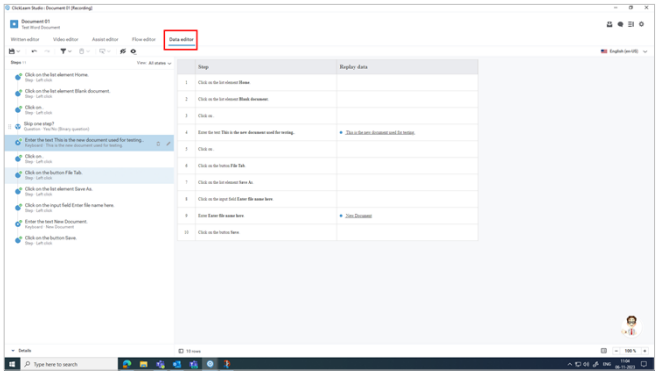
6.4.5. Manage Test Data with the Data Editor

6.4.5.1. Data Editor

Update the values in your recordings without re-recording, so demos and training stay accurate as your data changes.

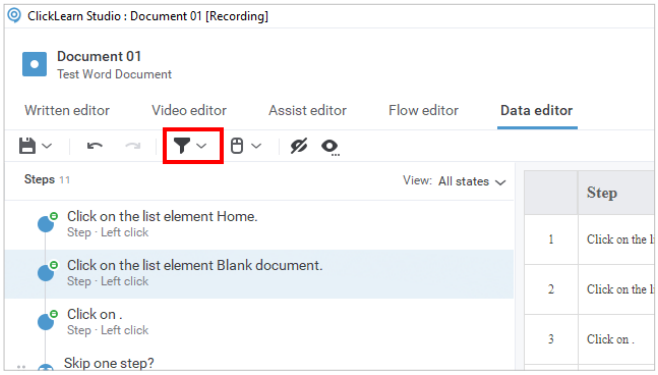
6.4.5.1.1. Introduction

The **Data editor** allows you to edit the data values used in your recordings. The data editor shows you a list of all the data fields captured in your recording, such as text inputs, drop-down selections, check boxes, etc. You can edit the data values by double-clicking or using the edit button.



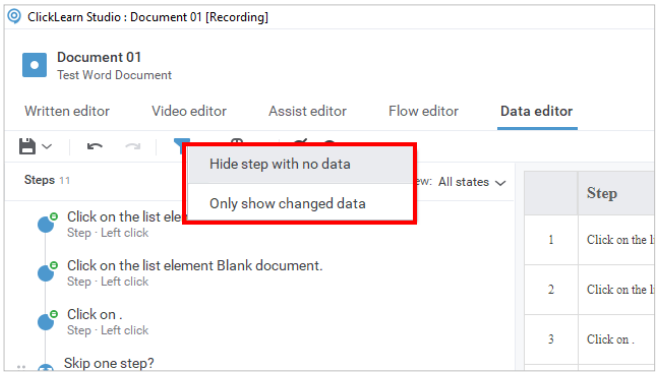
6.4.5.1.1.1. Basic elements of the data editor

Click on the drop-down of **Filter**.



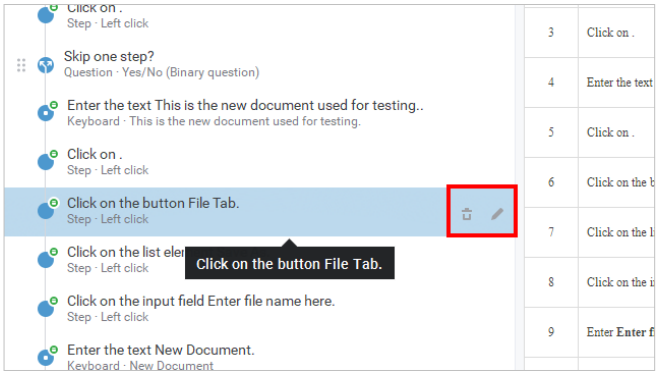
Filter offers you with two options.

- **Hide step with no data:** This feature hides all the steps with no data.
- **Only show changed data:** This will show only the steps with modified data.

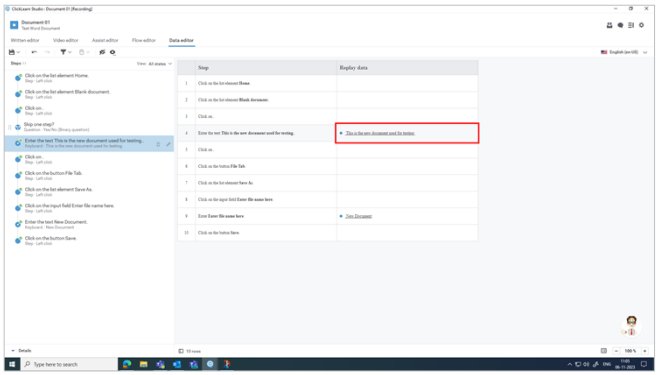


Unlike other editors, you can only add a delay in the Data Editor. The two options associated with each step are:

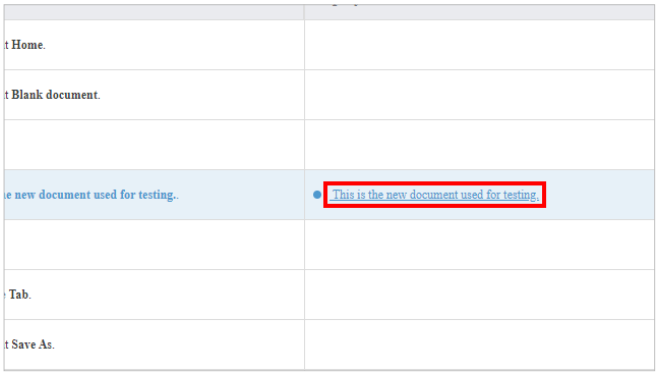
- **Delete:** This option deletes the selected step.
- **Edit:** This option allows you to add a delay to your steps.



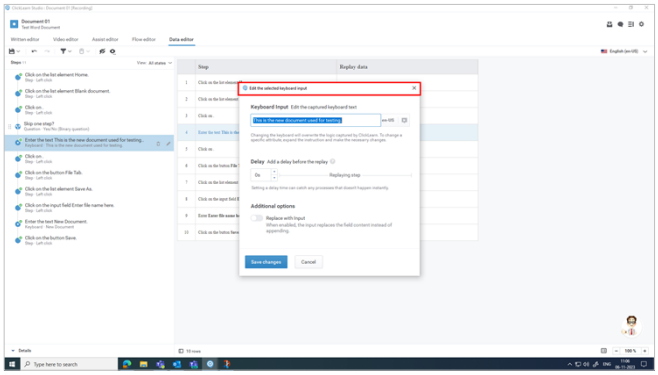
The steps that have data values are visible in the replay data column. In our case, the step **This is the new document used for testing** has data values.



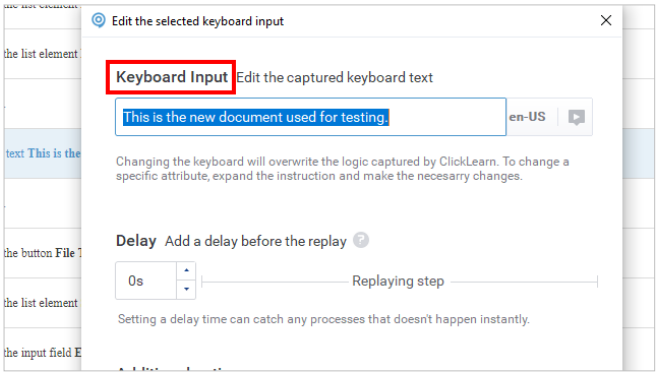
Click on the step you want to edit.



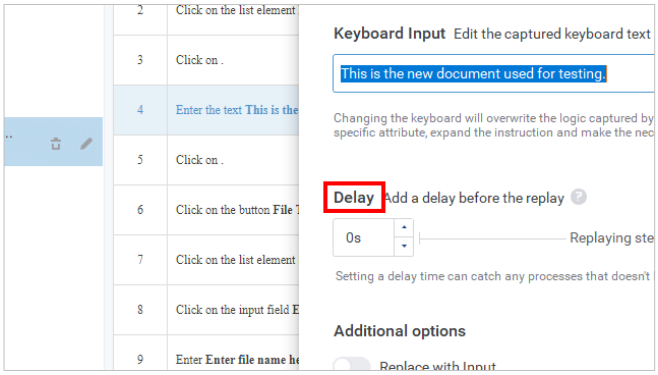
A new dialog allows you to edit the step and make the required adjustments. The other options associated with the Edit dialog box are.



Keyboard Input: This option allows you to edit the captured keyboard text.

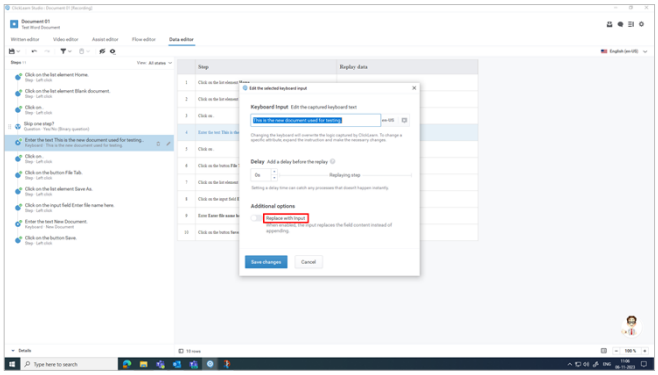


Delay: This allows you to add a defined pause in seconds. This is useful for systems that are slow to respond. Setting this will pause the recapturing process before trying to find the data.



6.4.5.1.1.2. Additional options

Replace with Input: When enabled, the input replaces the field content instead of appending.



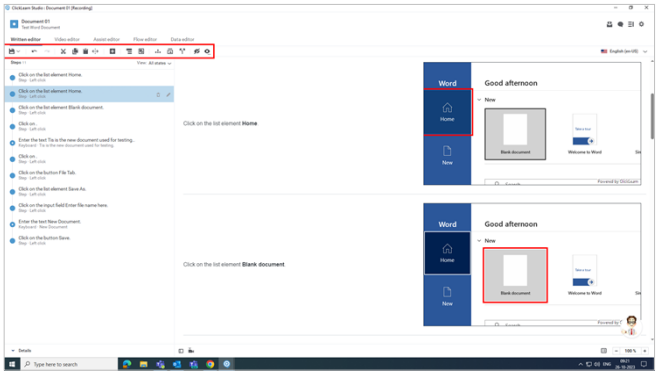
6.4.6. Common Editor Toolkit

6.4.6.1. Core Formatting Tools

Structure and organize your recording with sections, groups, and formatting tools, so the final documentation is clear, consistent, and easy for end users to follow.

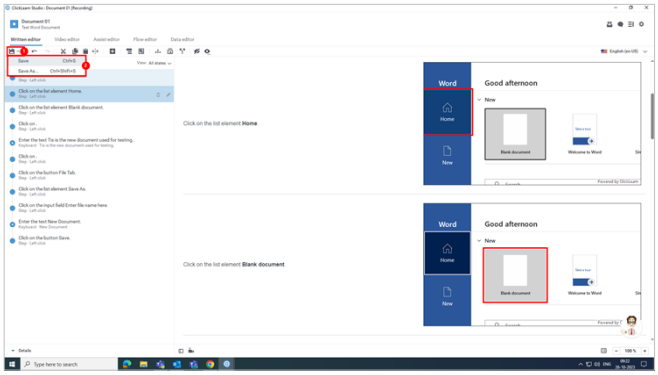
6.4.6.1.1. Introduction

Editors have some basic features that allow you to format your recordings with sections, groups, and other tools. This makes your business processes more transparent and understandable for your end users.



6.4.6.1.1.1. Save

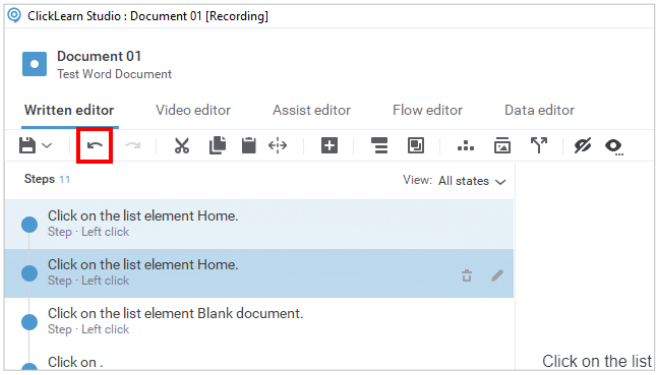
Save



1. **Save (Ctrl + S):** You can save your recording.
2. **Save As:** This option will enable you to save a copy of the current recording with a different name and location.

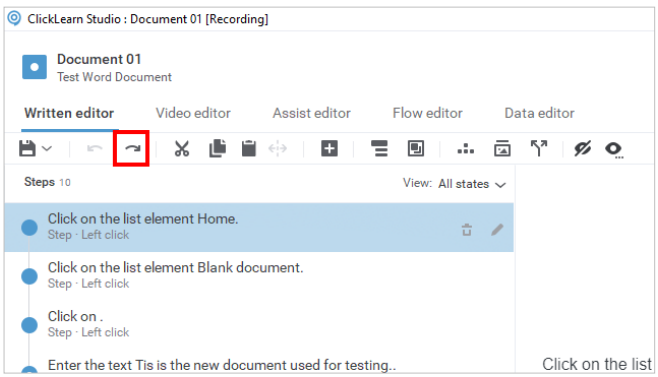
6.4.6.1.1.2. Undo

Undo (Ctrl + Z): This option allows you to undo a specific action you performed.



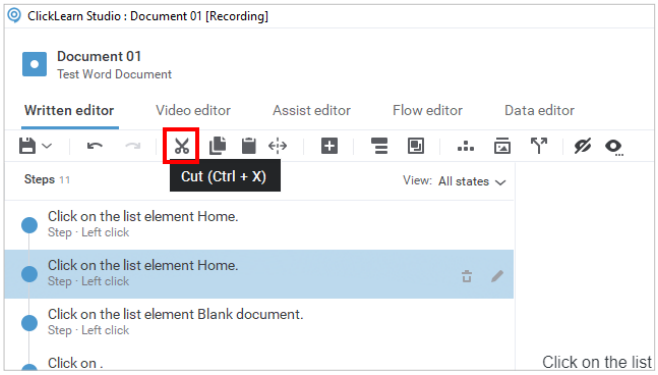
6.4.6.1.1.3. Redo

Redo (Ctrl + Y): This option allows you to redo a specific action you performed.



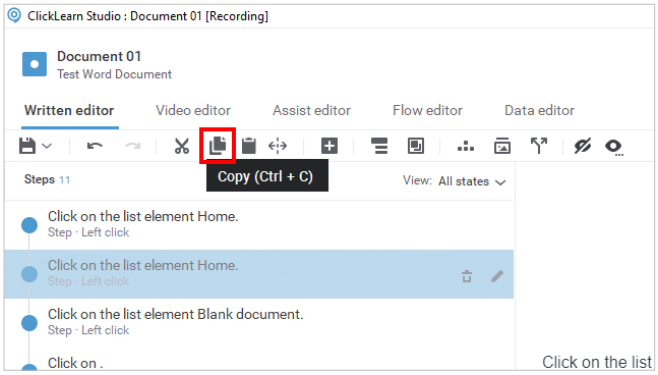
6.4.6.1.1.4. Cut

Cut (Ctrl + X): You can use this option to eliminate a particular step from your recording.



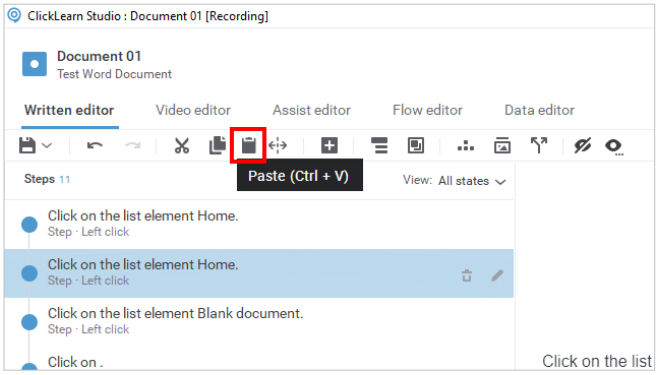
6.4.6.1.1.5. Copy

Copy (Ctrl + C): You can copy a particular step.



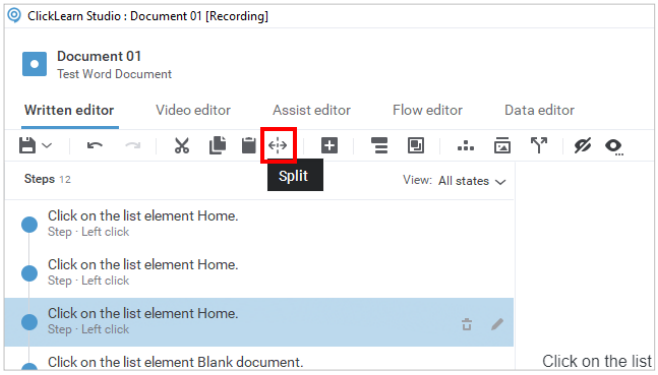
6.4.6.1.1.6. Paste

Paste (Ctrl + V): You can paste the copied step at the desired location.

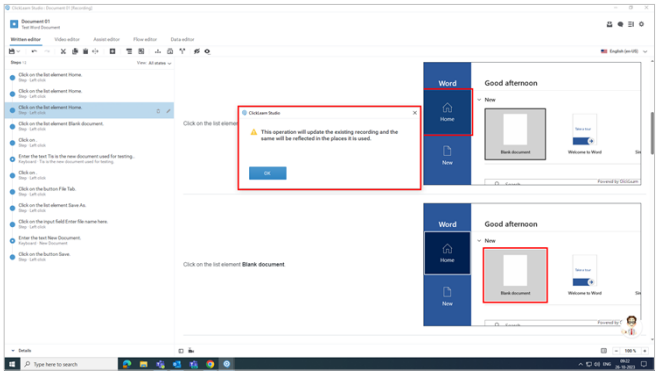


6.4.6.1.1.7. Split

Split: This feature helps you create multiple short recordings from a single recording.

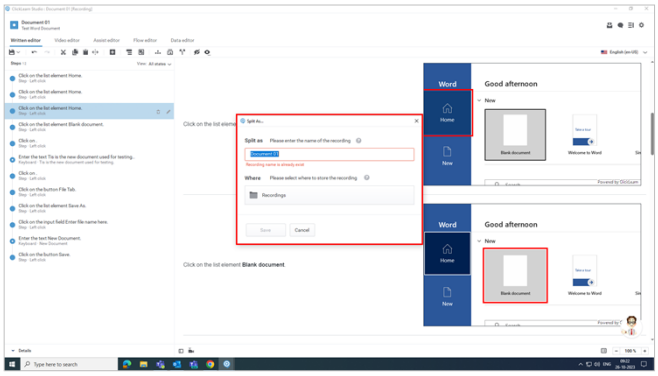


This pops up with a new dialog box displaying a warning message. Click on the button **OK**.



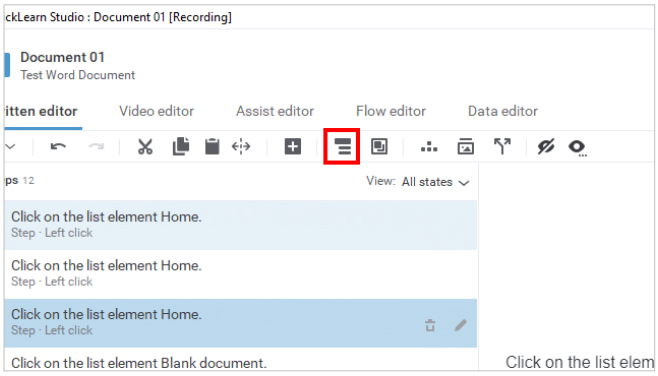
Once you click the **OK** button, another screen asks you to name the recording and where you can save the recording.

Enter the name for the recording, select the location, and click on Save.



6.4.6.1.1.8. Add new section

Add New Section: This feature helps you to create an organized structure for your business processes.

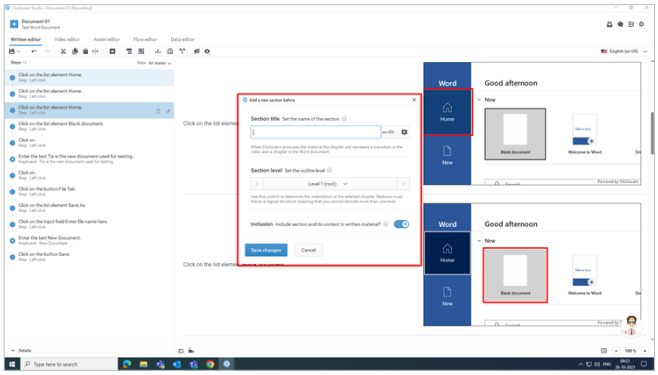


Section Title: You can set the section name here. A chapter is used to create structure in a recording.

Section Level: You can set the outline of the section level from here.

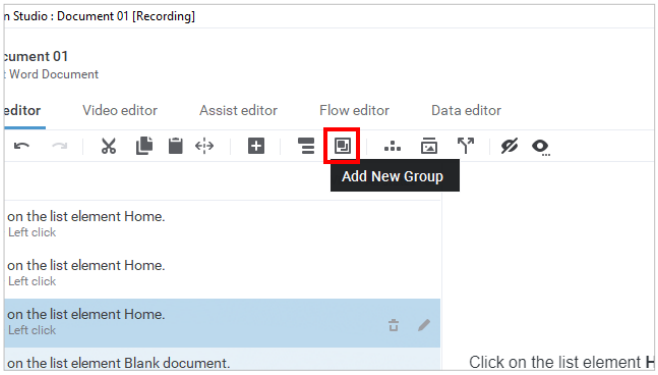
You can use this control to determine the indentation of the selected chapter. Sections must follow a logical structure, meaning you cannot demote more than one level.

Inclusion: The section will be included/excluded from the written documentation.



6.4.6.1.1.9. Add new group

Add New Group: You can use the add new group element to group two or more steps.

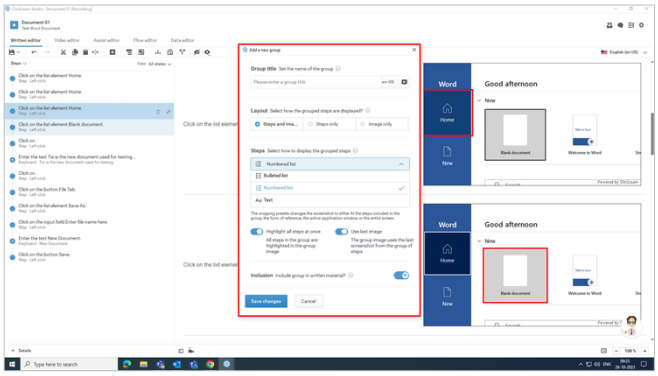


Group title: When you group multiple steps, you must assign a title for that group.

The title will be used across content to display the grouped steps correctly.

Layout: This will display the layout of the list of steps and how it should display the associated instructions and images. There are three available options.

- **Steps and images:** This will display the steps and images and annotated screenshots.
- **Steps only:** This will show only steps.
- **Image only:** This will display only images.



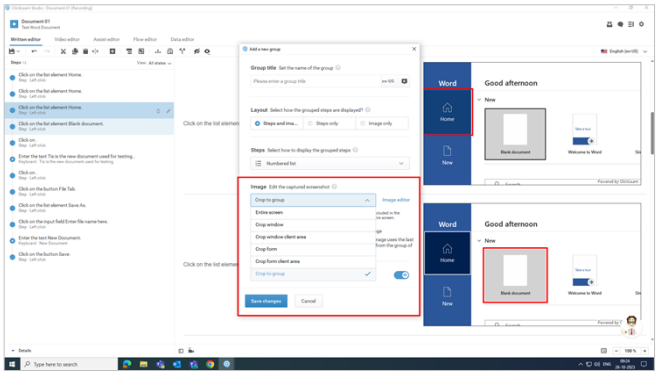
Steps: You can select how to display the grouped steps. There are three available options.

- **Bulleted list:** Shows the steps as bullets.
- **Numbered list:** Shows the steps with numbers.
- **Text:** Shows the steps as plain text.

Image: You can edit the captured screenshot. You can determine how you want to crop the image associated with the group.

Image editor: You can use this to customize your screenshot or redact sensitive areas of the screenshot. You can also modify the highlight with a hotspot to represent your screenshot.

- Entire screen
- Crop window
- Crop window client area
- Crop form
- Crop form client area
- Crop to group

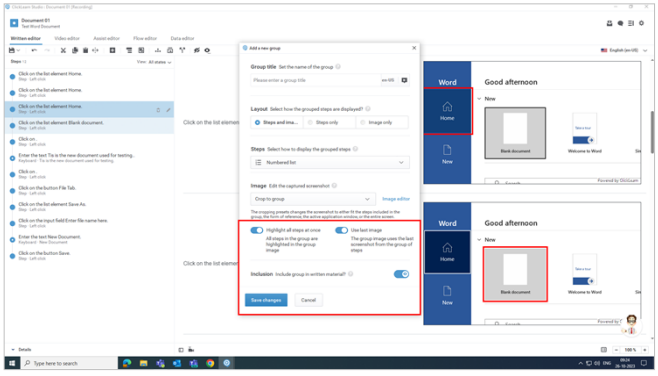


Highlight all steps at once: All the steps in the group are highlighted in the group image.

Use last image: The group image uses the last screenshot from the group of steps.

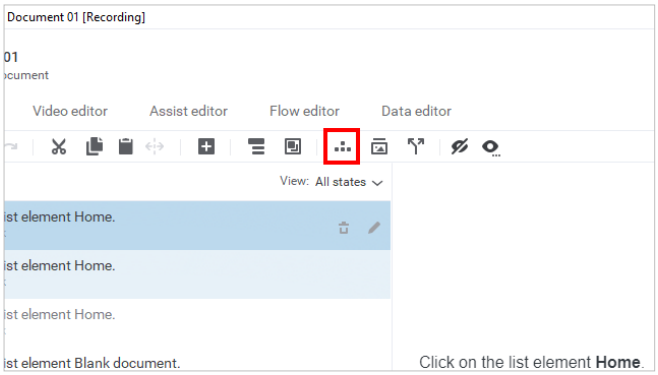
Inclusion: The group will be included/excluded from the written material.

Save changes: This will save all your changes in adding a new group.



6.4.6.1.1.10. Add new keyboard text

Add New Keyboard Text: This feature helps you to add new keyboard text to your recordings.



Display: You can select how you want the keystroke to be displayed. There are three options.

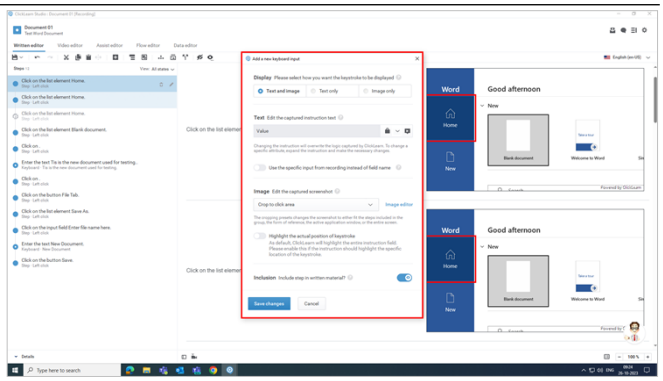
- Text and image
- Text only
- Image only

Text: You can customize the captured keyboard action by unlocking the field.
You can also use the specific input from the recording instead of the field name.

Image: You can edit the captured screenshot.

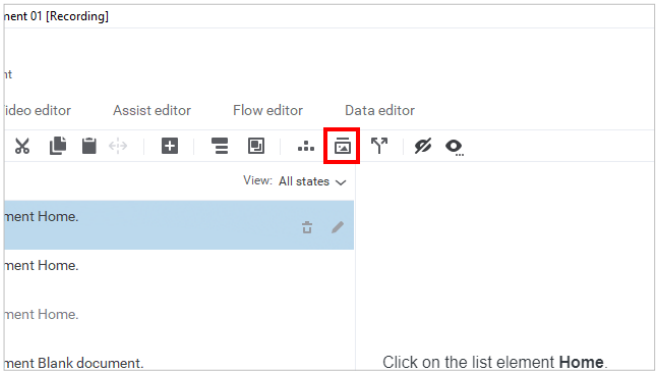
Highlight the actual position of keystroke: You must enable this option if you want the instruction to highlight the keystroke's specific location.

Inclusion: The keyboard step will be included/excluded from the written material.



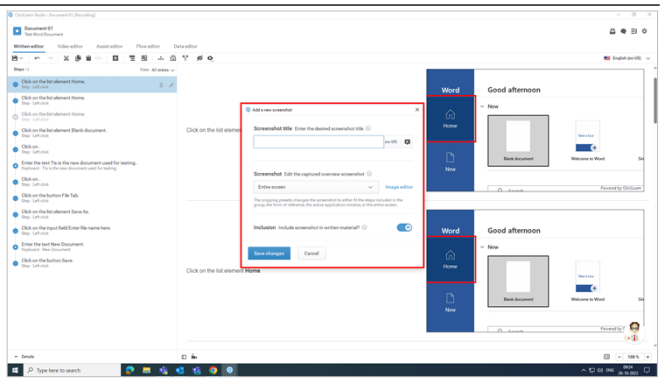
6.4.6.1.1.11. Add new screenshot

Add New Screenshot: This feature will capture the screenshot from next step and will allow you to describe it before the action.



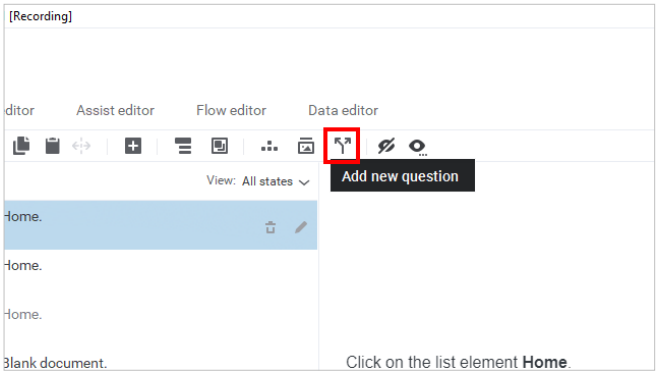
Screenshot title: You must provide the name for the screenshot. The title will be used as a caption for your screenshot.

Screenshot: You can determine how you want to crop the screenshot. You can use the image editor to customize your screenshot or redact sensitive areas of the screenshot.



6.4.6.1.1.12. Add new question

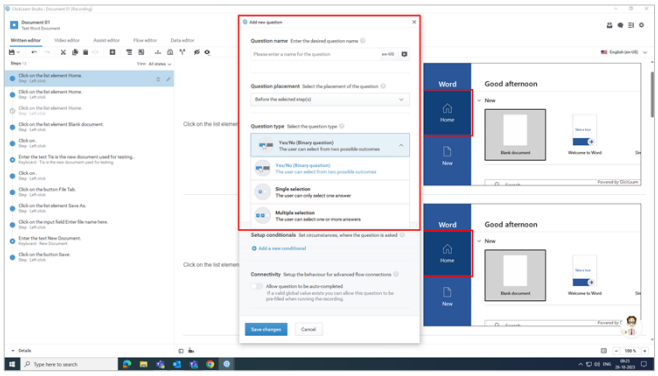
Add new question: This feature allows you to add a question to your recording.



Question name: Write the text for your question.

Question placement: This is where you want to locate your question. Typically, it is a good idea to place questions at the beginning of a section or the beginning of the recording. There are three available options for question placement.

- Before the selected step
- At the beginning of the current section
- At the beginning of the recording



Question type: You can select the type of question you ask the user. There are three options.

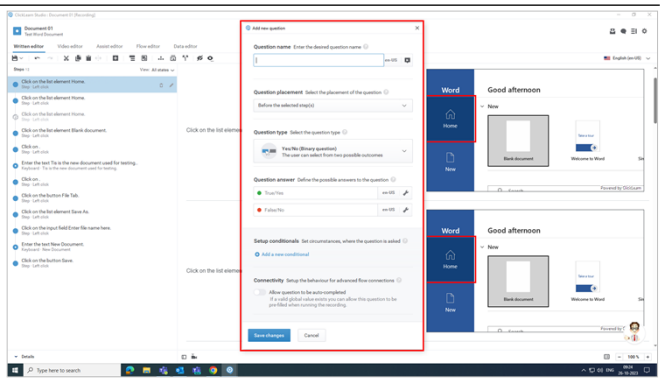
- **Yes/No (Binary question):** The user can select from two possible outcomes.
- **Single selection:** The user can choose only one answer.
- **Multi-selection:** The user can select one or more answers.

Question answer: Depending on the question type you select, you can set the answers to your questions.

Setup conditionals: You can set up the circumstances to include the steps.

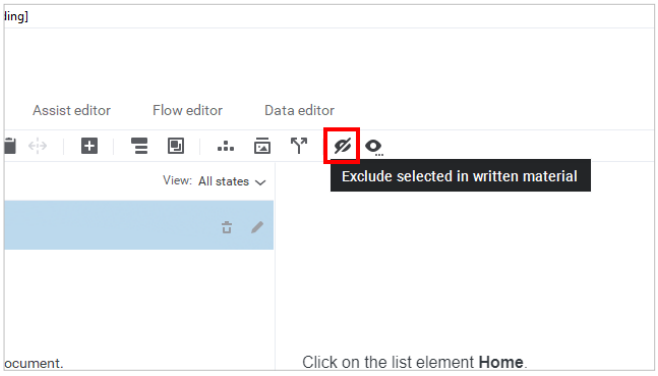
Connectivity: You can set up the behavior for advanced flow connections.

Allow question to be auto-completed: If a valid global value exists, you can allow this question to be pre-filled when running the recording.



6.4.6.1.1.13. Exclude selected in written material

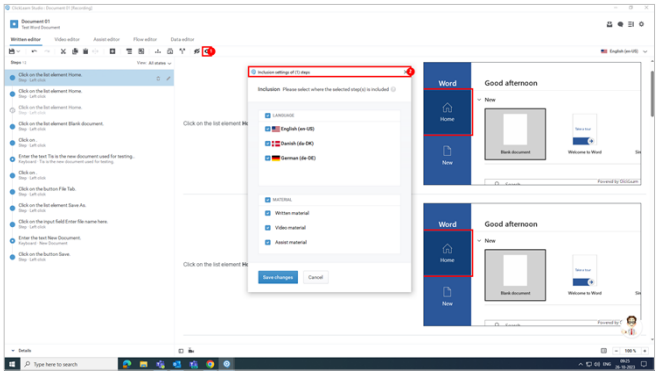
Exclude selected in written material: This will exclude the selected step from the written material.



6.4.6.1.1.14. Inclusion options

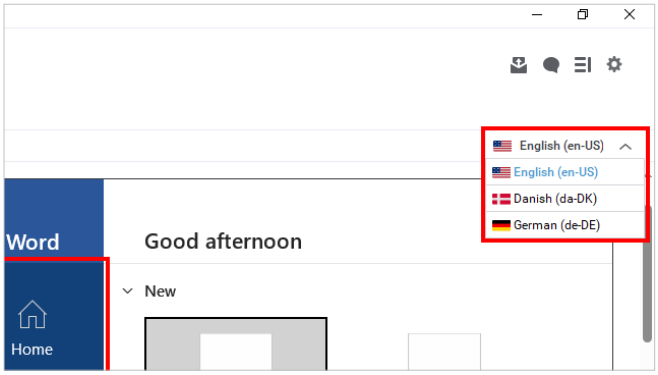
Inclusion options

1. Click on the **Inclusion options** button.
2. This pops up with a new dialog box where you can select the language of the content material in which the step must be included.



6.4.6.1.1.15. Language

Language: Click on the dropdown item **English (en-US)**. You can change the language of your Project from here.



6.4.6.2. Support and Management Tools

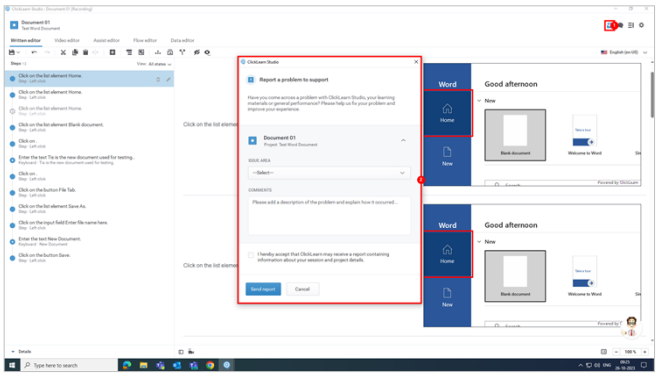
Keep recordings organized and supported, with built-in tools to report issues, collaborate, and manage settings, all without leaving the editor.

6.4.6.2.1. Other elements associated with Editors

6.4.6.2.1.1. Report

Report

1. Click on the label **Report**.
2. This opens a new window where you can report your problem to support.

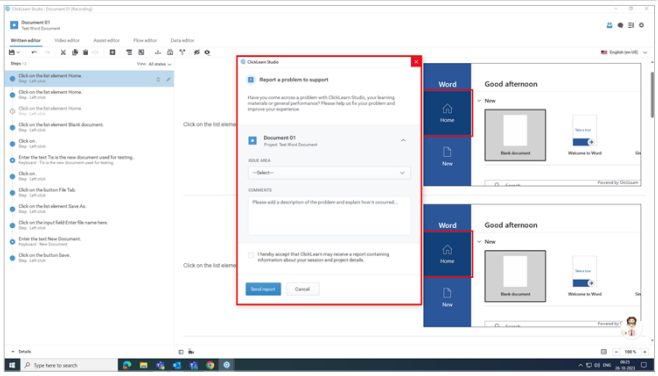


Recording name: This displays the name of the recording along with the project name.

Issue Area: You can select the issue area from the drop-down based on your issues.

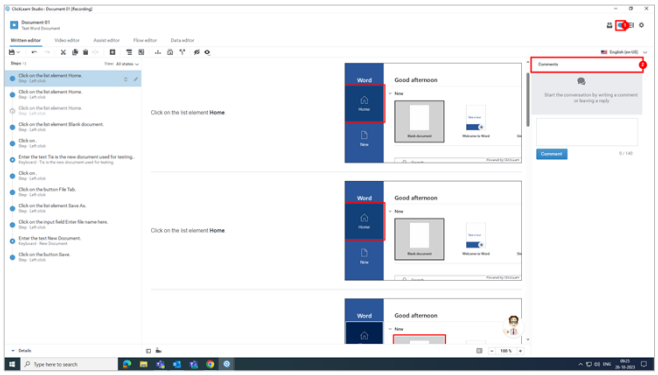
Comments: You can add a description of the problem and explain how it occurred in the comments section.

To send the report, check the box and click the **Send report** button.



6.4.6.2.1.2. Chat

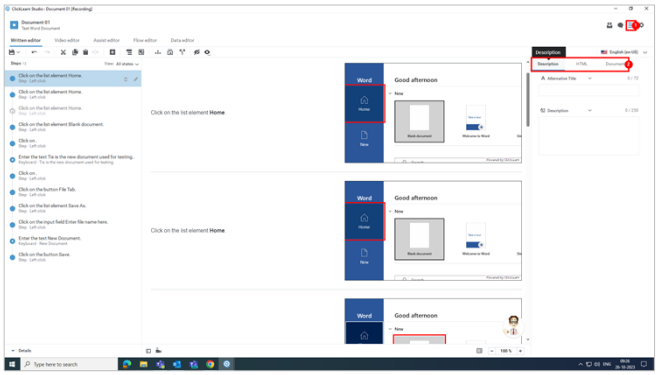
Chat



1. Click on the label **Chat**.
2. **Comments:** You can directly start the conversation by writing a comment or leaving a reply.

6.4.6.2.1.3. Meta Data Properties

Meta data properties

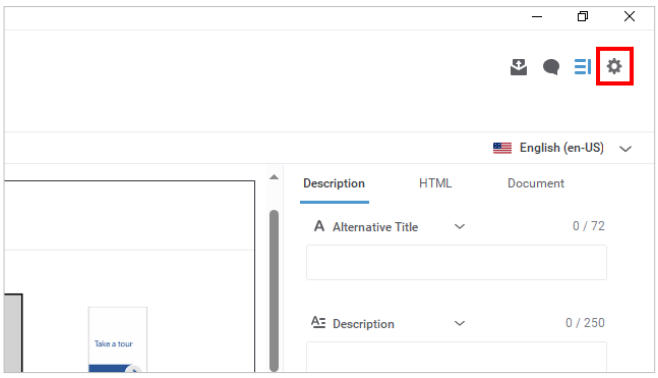


1. **Meta Data Properties:** This will display all the meta data properties and the components associated with each property.
2. The available meta data properties are

   - **Description**
   - **HTML**
   - **Document**

6.4.6.2.1.4. Settings

Settings: You can manage the settings from here.

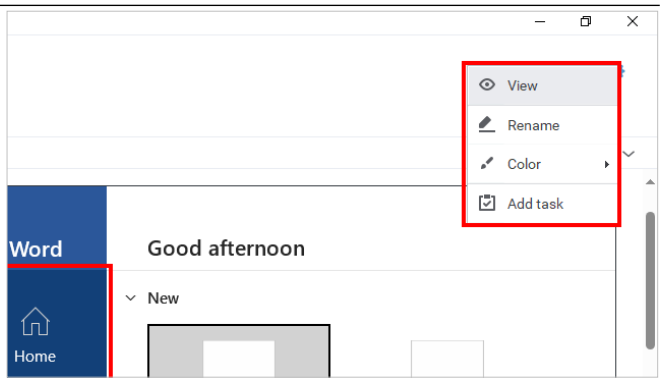


View: This generates a preview of the current recording.

Rename: You can rename the recording.

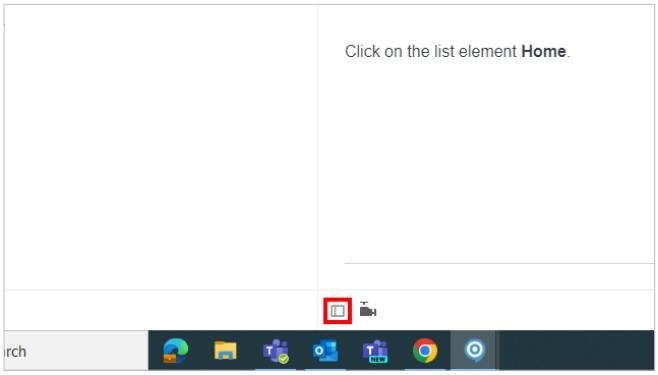
Color: You can change the color icon of your recording.

Add Task: You can add a new task for the current recording.



6.4.6.2.1.5. Expand/Collapse Details

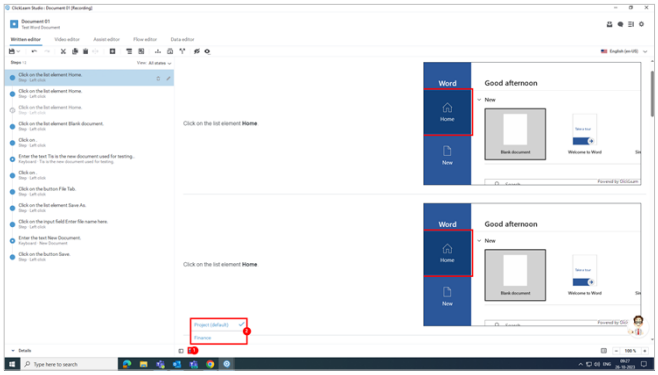
To Expand/Collapse Details: This button allows you to expand/collapse the recording details.



6.4.6.2.1.6. Publishing Template

Publishing Template

1. Click on the button **publishing template**.
2. This displays the **Project (default)** along with segmentations, if any. In our case, we have **Finance** as a segment.



6.5. Customise Connector Template Text

Standardize and translate the instruction text ClickLearn generates, so recordings speak your organization's language, consistently, across projects and connectors.

6.5.1. Modify the template items.

ClickLearn provides a feature that enables users to manage their template items effectively. There are two distinct methods for accomplishing this.

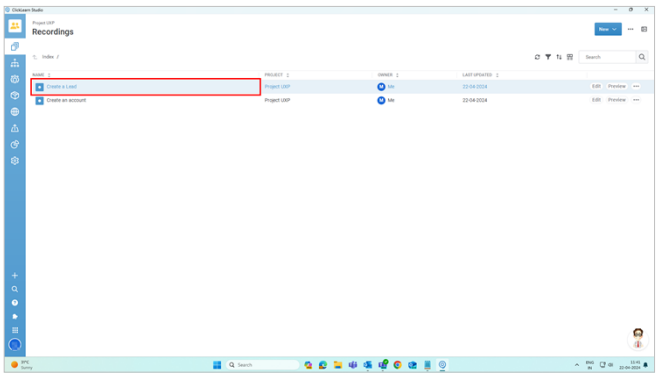
Editing the step: Users can directly edit the step and modify the template item as needed.

Language Settings: Users can change the template items by navigating to '**Language Settings**' and selecting '**Language Template Editor**.'

6.5.1.1. Editing the step

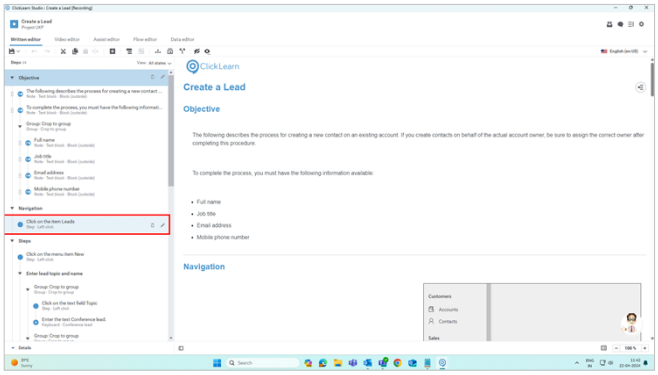
To modify a template item, select the recording you intend to update.

Double-click on the grid view cell **NAME** with data: **Create a Lead**.

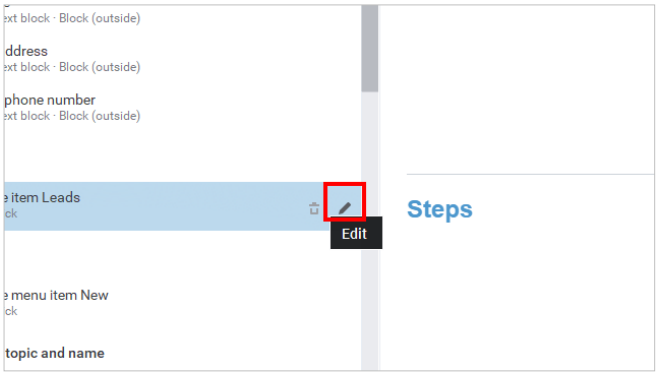


Select the step to modify the template item.

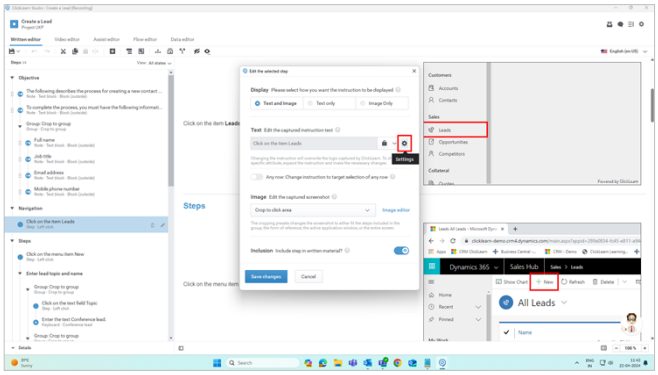
Click on the steps: **Click on the item Leads**.



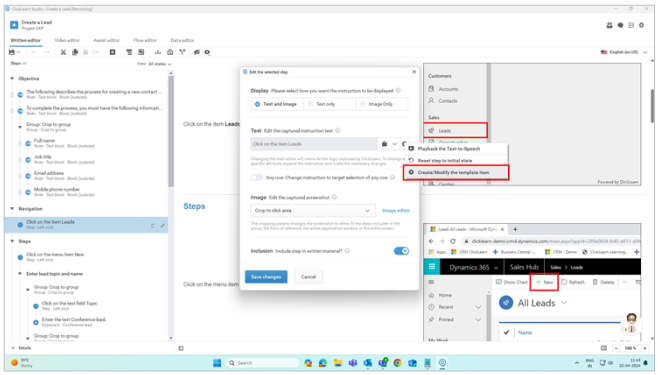
Click on the **Edit** icon of the step.



Click on the icon **Settings**.

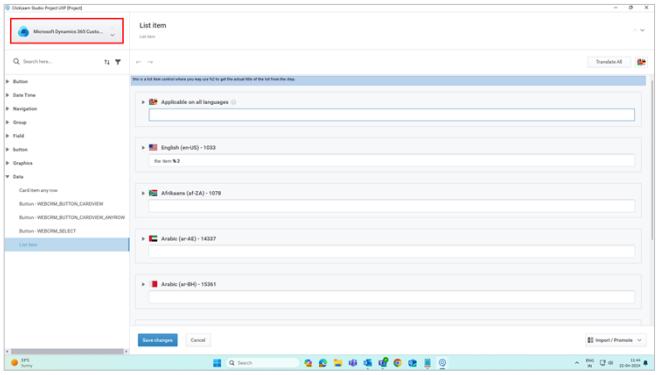


Click on the menu item **Create/Modify the template item**.

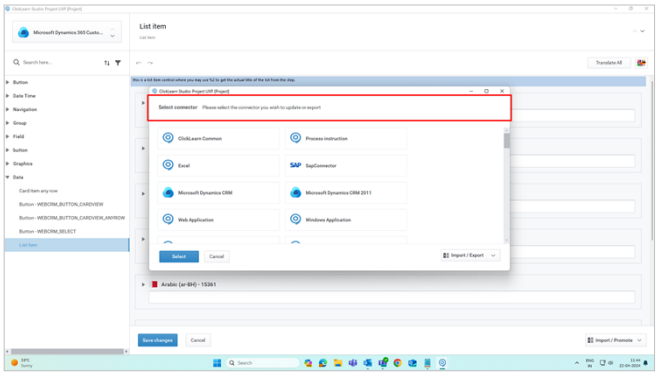


6.5.1.1.1. Changing Connectors

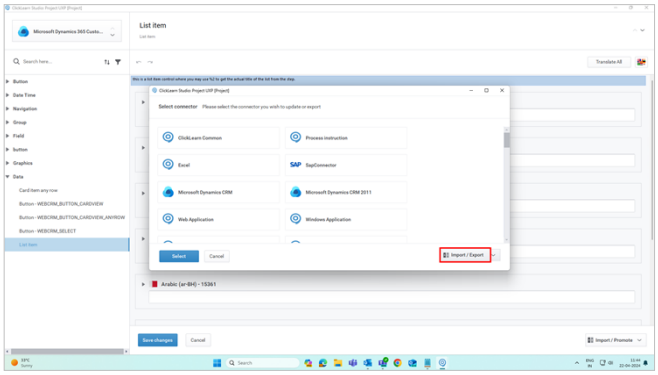
Click on the panel to change the connector.



A new window opens, which displays the list of connectors to choose from.

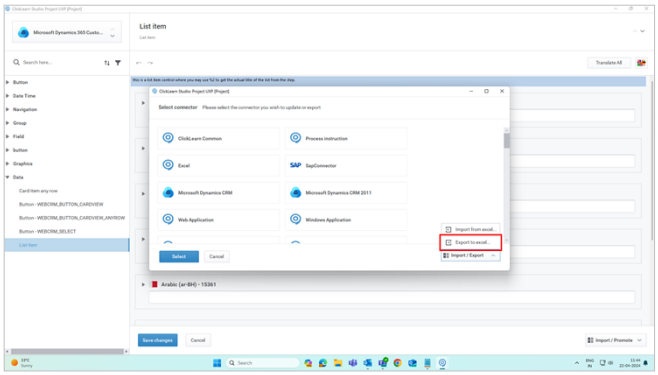


Click on the button **Import / Export**.



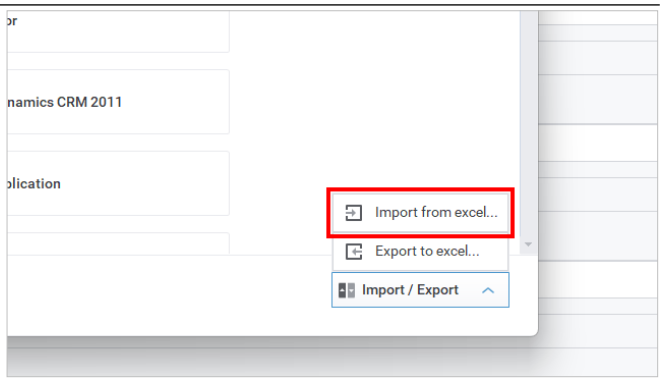
Click on the list view item: **Export to excel**.

This exports the details to an Excel file, where you can make the necessary changes, save the file, and import it again.



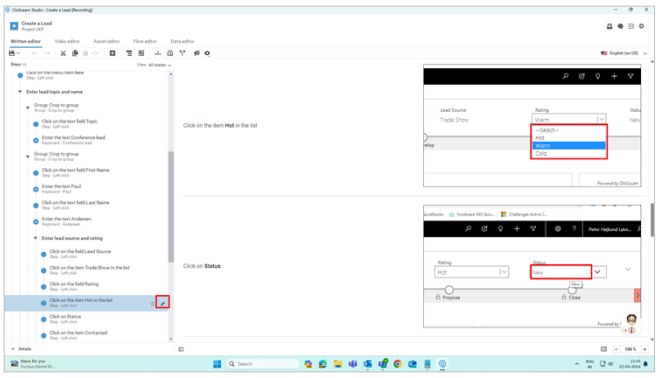
Click on the list view item: **Import from excel**.

This button allows you to import the Excel file.

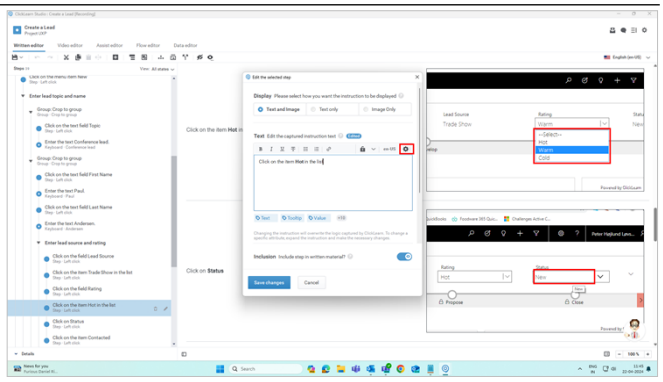


6.5.1.1.2. Editing the template item

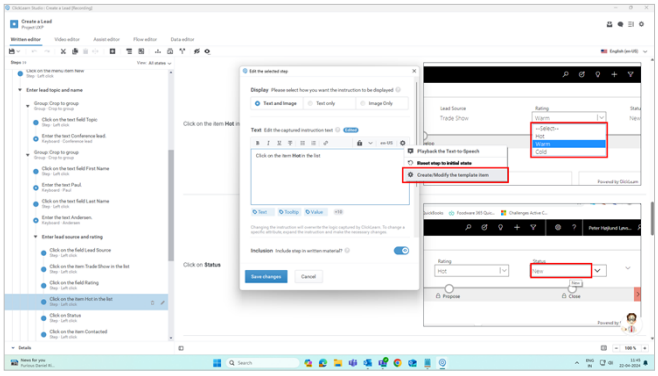
Click on the **Edit** icon of the step where you wish to modify the template item.



Click on the icon **Settings**.

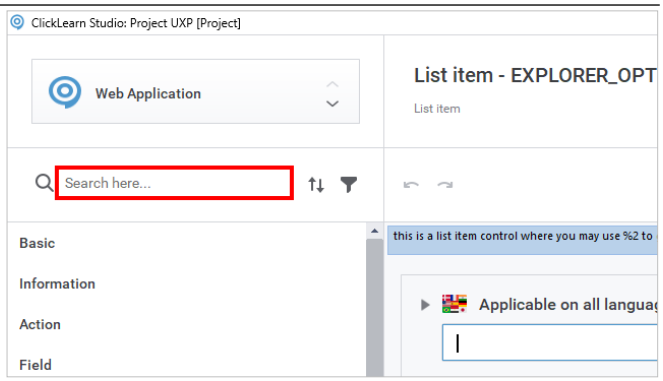


Click on the menu item **Create/Modify the template item**.

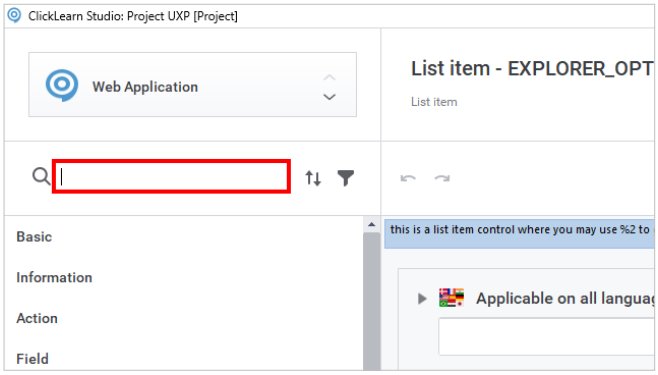


You can find the text under the options listed below. You can also use the search feature to find the specific element.

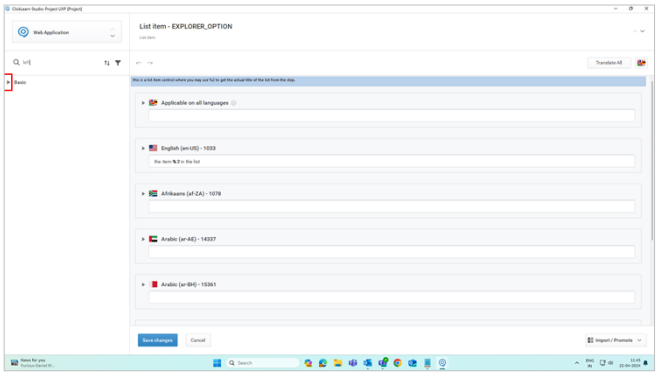
Click on the input textbox **Search** with value **Search here**.



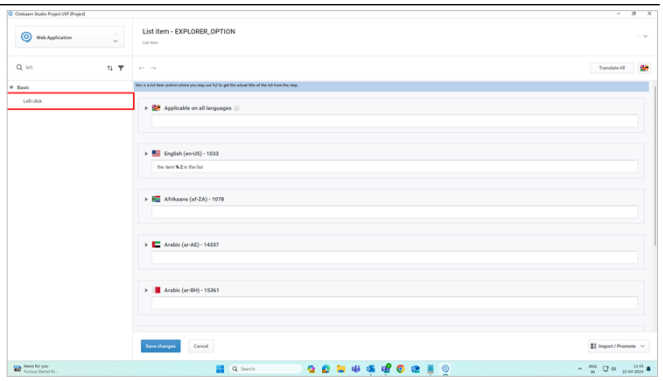
Enter **Search**.



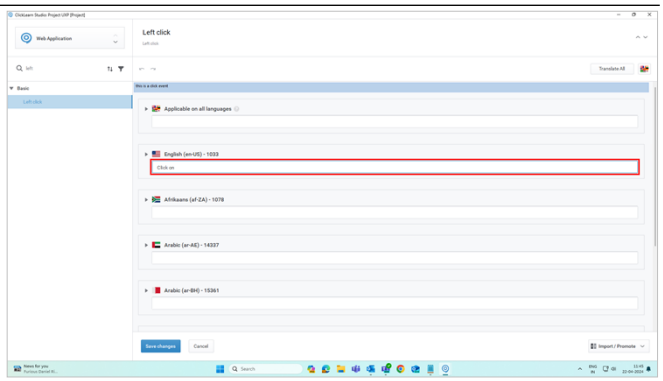
Click on the tree node expander **Basic**.



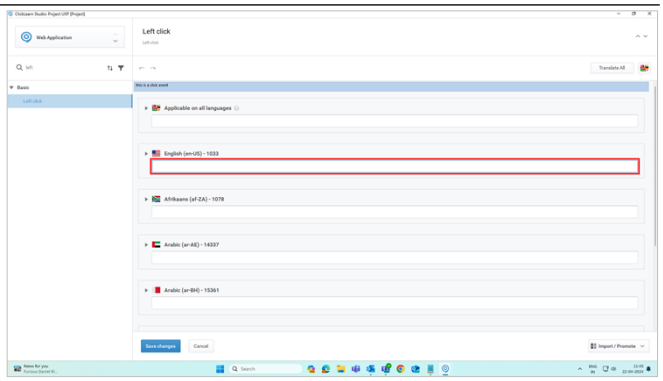
Click on the tree node: **Left click**.



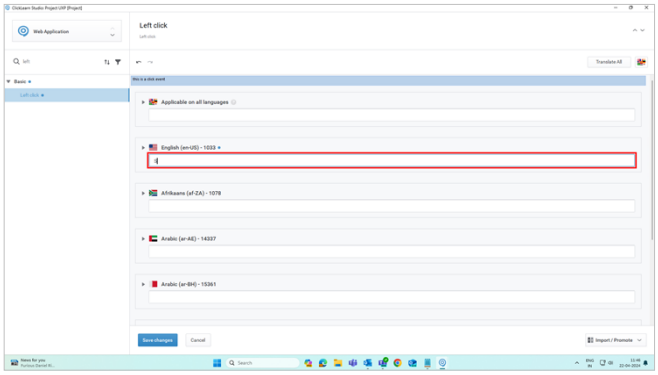
Click on the text editor **Content** and select the word **Click on**.



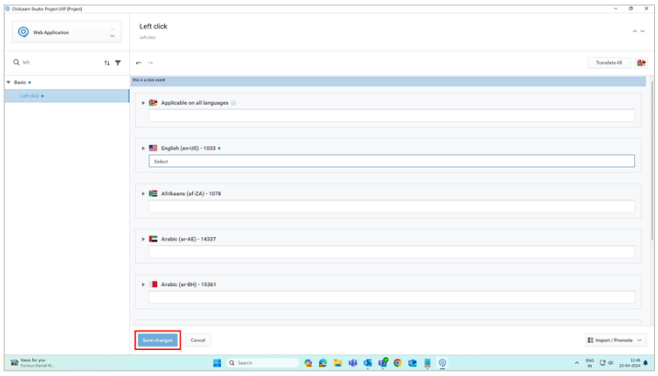
Press the **Delete** key.



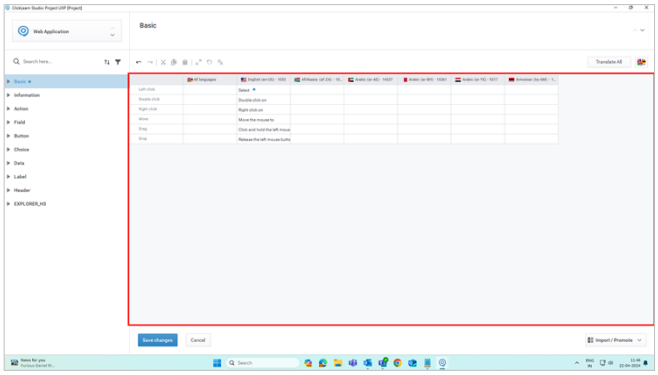
Enter **Content**.



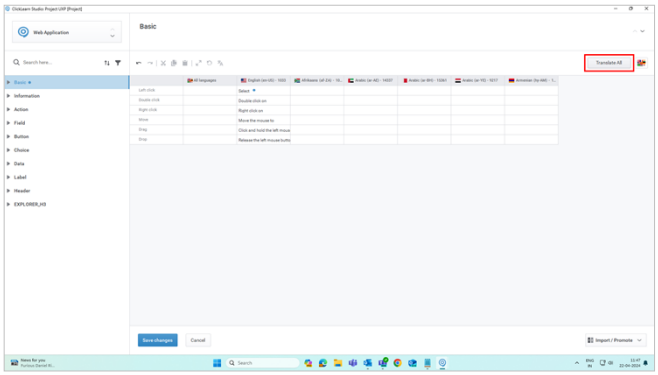
Click on the button **Save changes**.



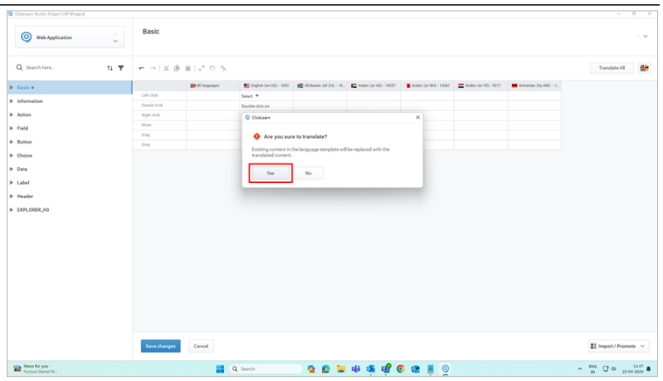
Empty cells within the grid signify that translations are missing for the respective language.



To translate, click on the button **Translate All**.

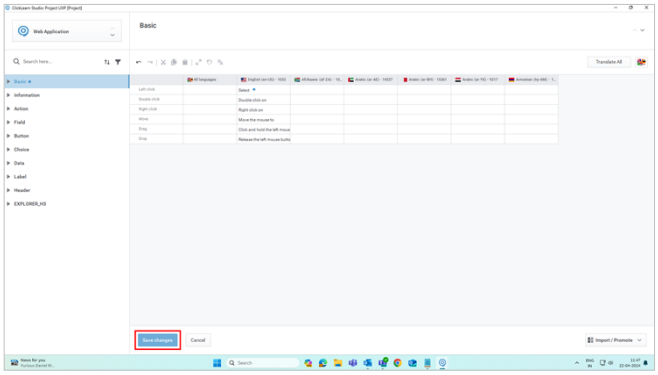


Click on the button **Yes**.

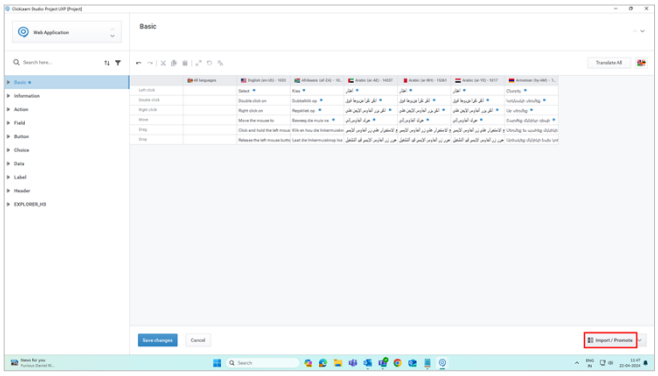


Click on the button **Save changes**.

Once you click on Save changes, it displays the translation of the languages.

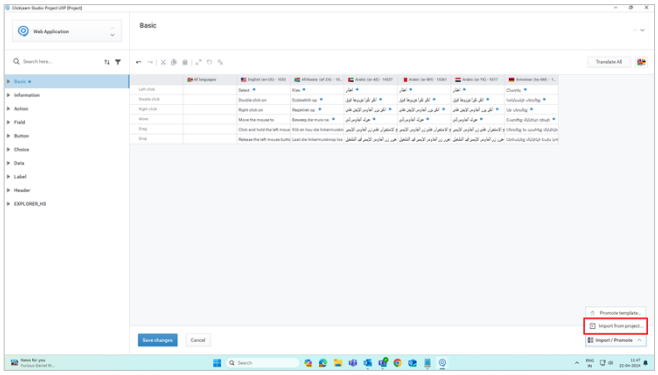


Click on the button **Import / Promote**.

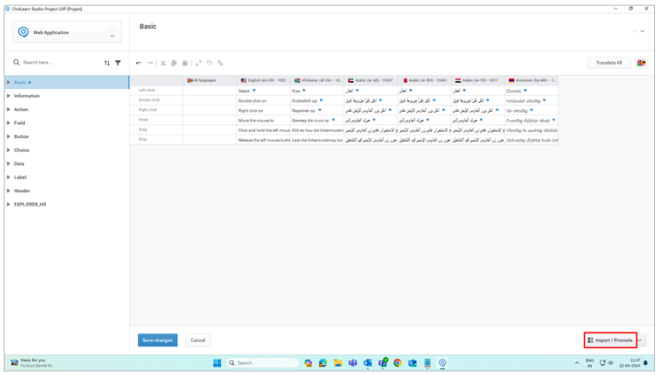


Click on the list view item **Import from project**.

This function allows you to import template items from the project you select.

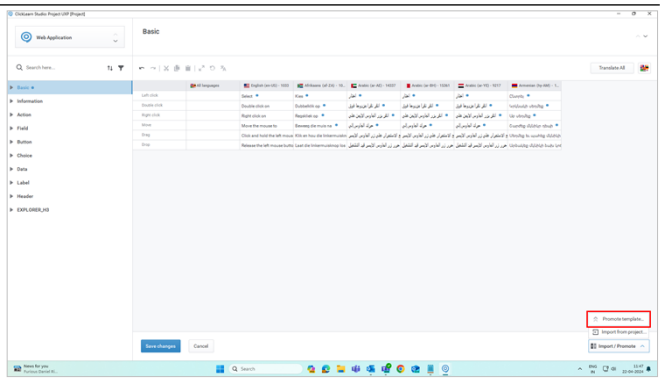


Click on the button **Import / Promote**.

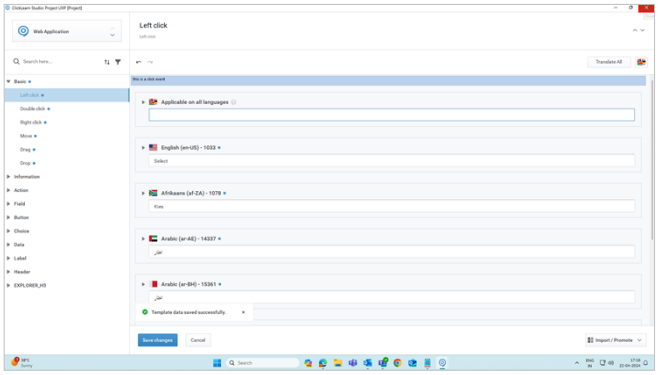


Click on the list view item **Promote template**.

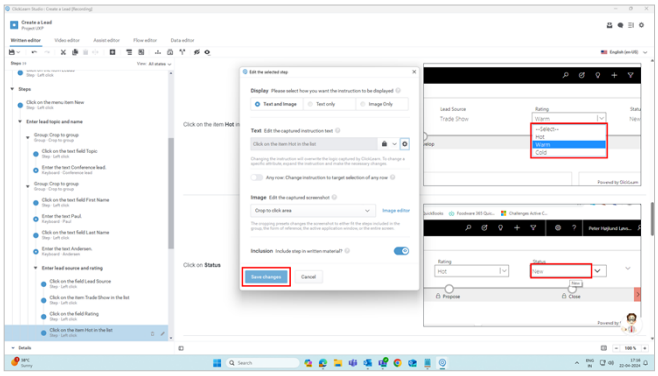
This function will apply the template text settings to the current and later projects you create.



Click on the close button of **ClickLearn Studio: Project UXP [Project]**.



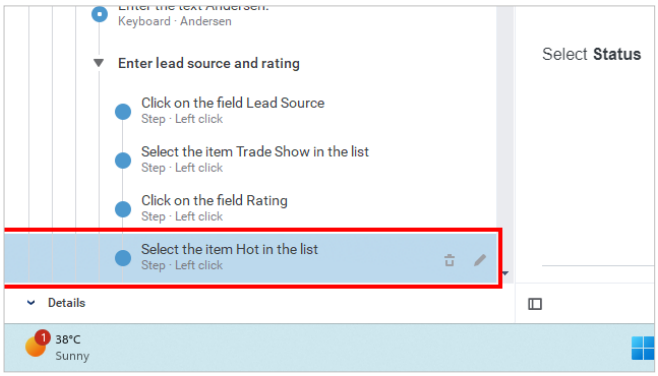
Click on the button **Save changes**.



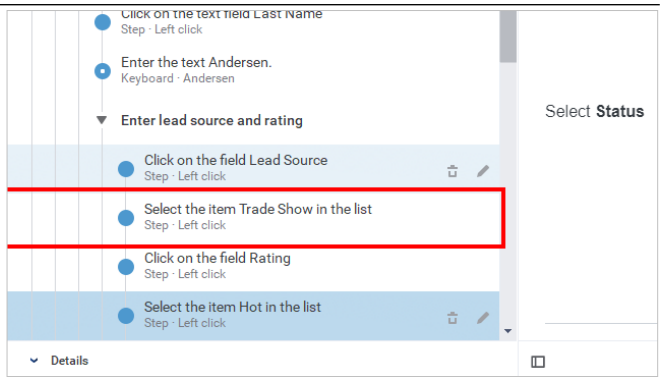
6.5.1.1.3. Example of the steps in the recording

The steps are now changed to **Select** from **Click on**.

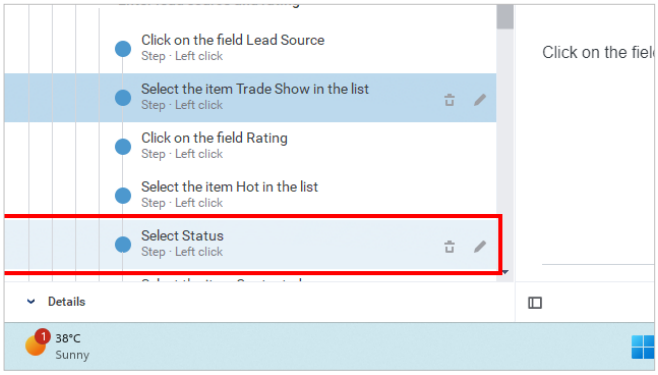
Click on the steps: **Select the item Hot in the list**.



Click on the steps: **Select the item Trade Show in the list**.

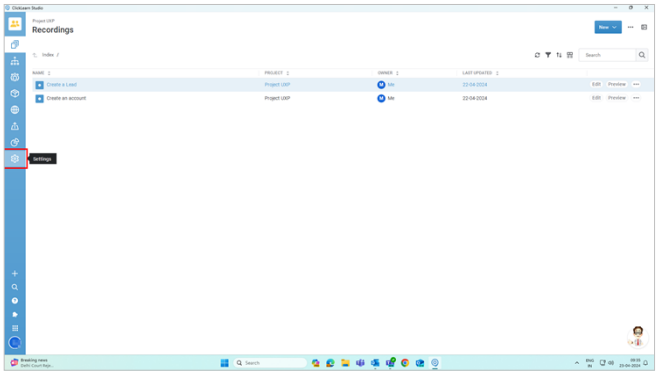


Click on the steps **Select Status**.

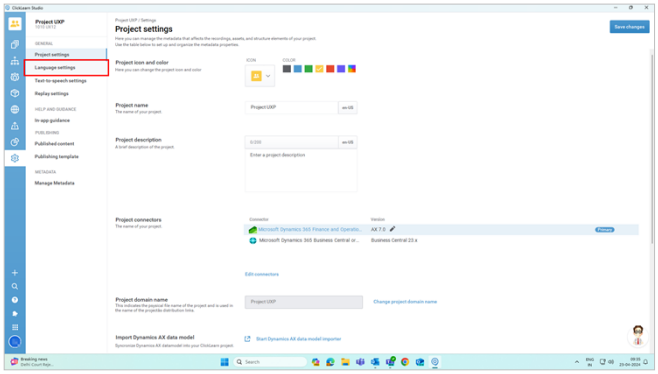


6.5.1.2. Language Settings

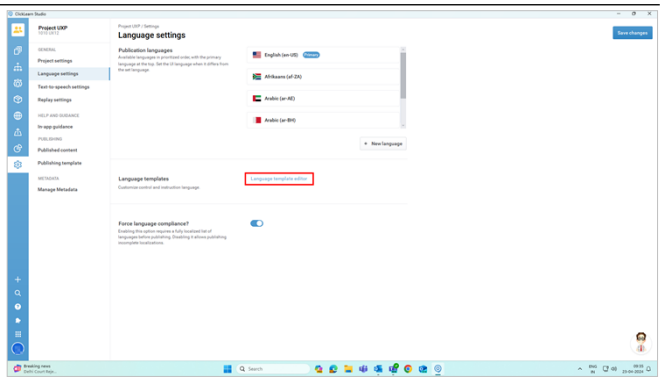
Click on the **Settings** button.



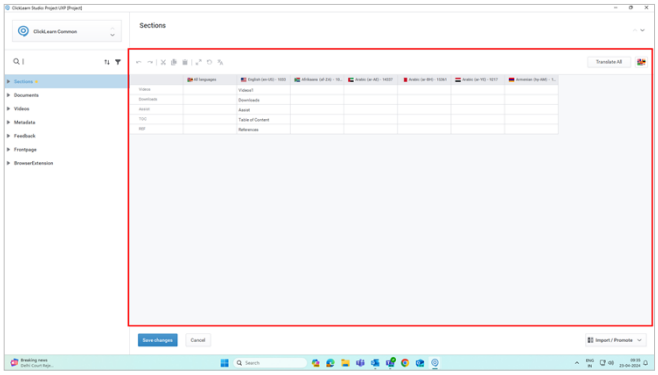
Click on the button **Language settings**.



Click on the button **Language template editor**.



This opens up the same screen as shown above when you click on **Create/Modify the template item**.



6.6. Change Voice for a Specific Step

Apply a different voice to a single step without changing the project default. It is useful when one section needs to be highlighted differently or recorded by a different speaker.

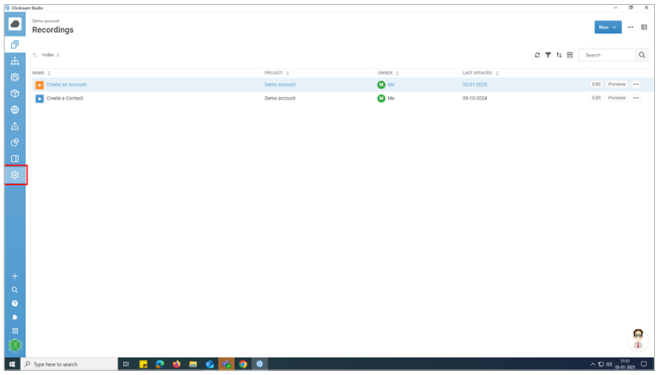
6.6.1. Introduction

The default voice for a project is set initially, but customers have the option to change it by navigating to Settings > Text to Speech. This setting determines the overall voice used in the project. However, keep in mind that the publishing template can overwrite the voice set in the settings.

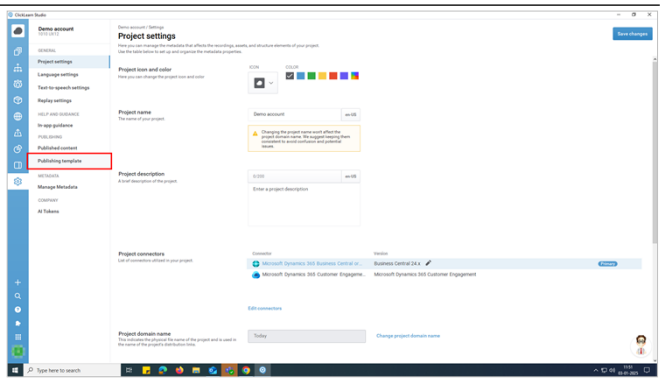
Additionally, customers can customize the voice for specific notes by going to individual steps within the project. This change will also override the voice defined by the publishing template, allowing for greater flexibility in sound variations.

6.6.1.1. Default Voice in Publishing Template

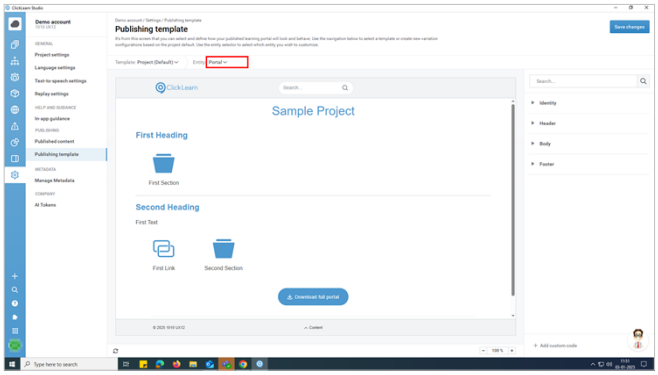
Click on the button **Settings.**



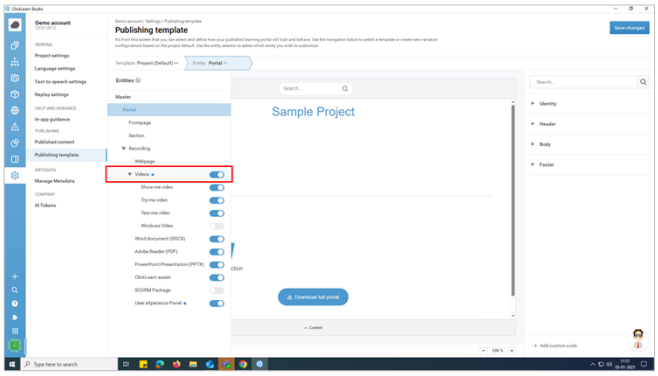
Click on the button **Publishing template.**



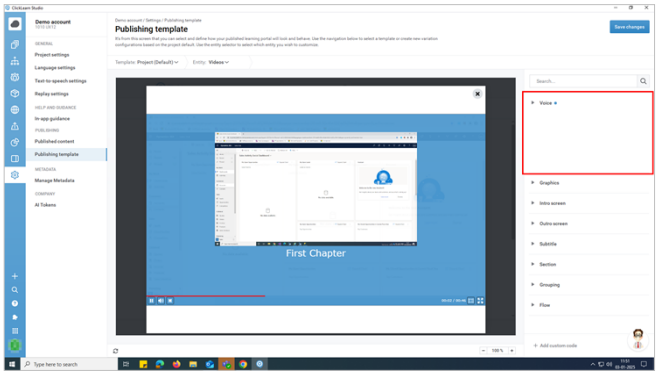
Click on the button **Portal.**



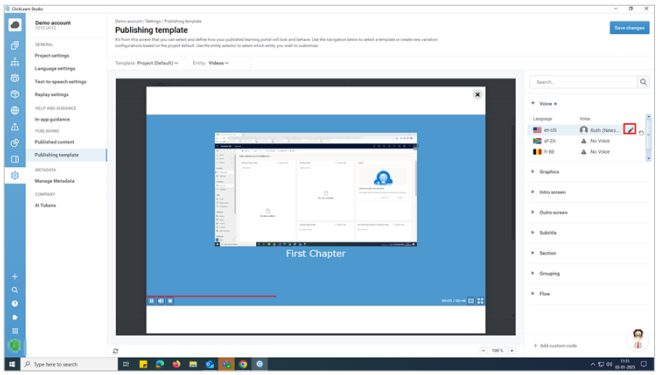
Click on the tree node **Videos.**



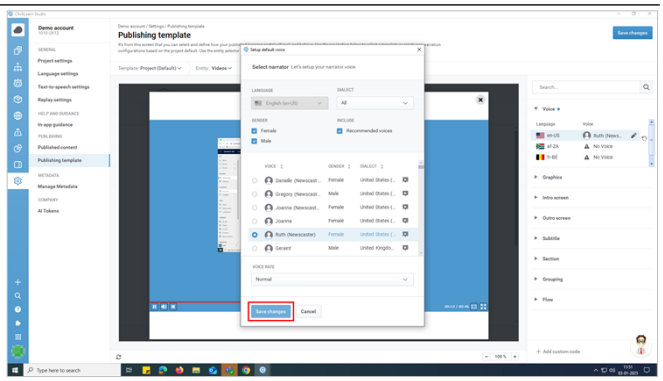
Click on the collapsible panel **Voice.**



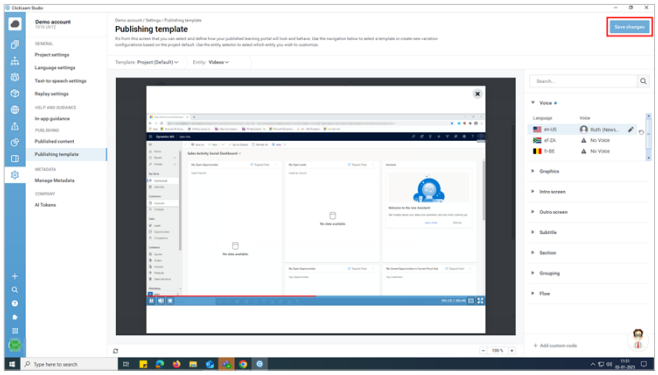
Click on the button **Edit** of grid cell **Action.**



Click on the button **Save changes.**



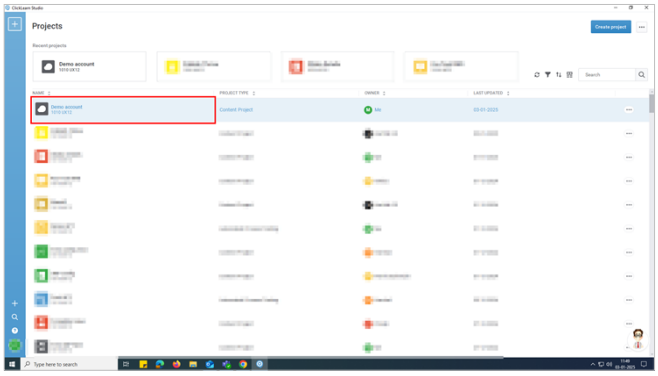
Click on the button **Save changes.**



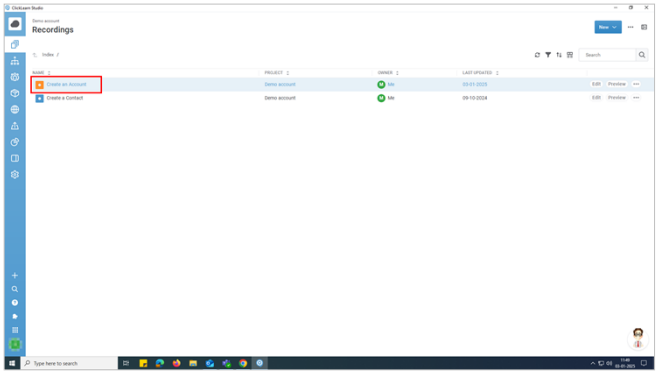
6.6.1.2. How to Change Voice for Specific Note

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

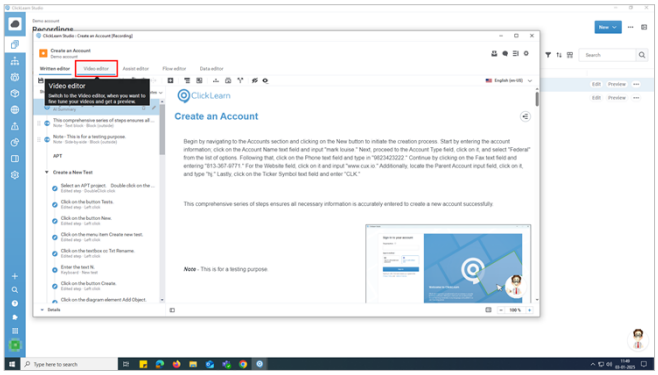
Select the project you wish to set a voice.



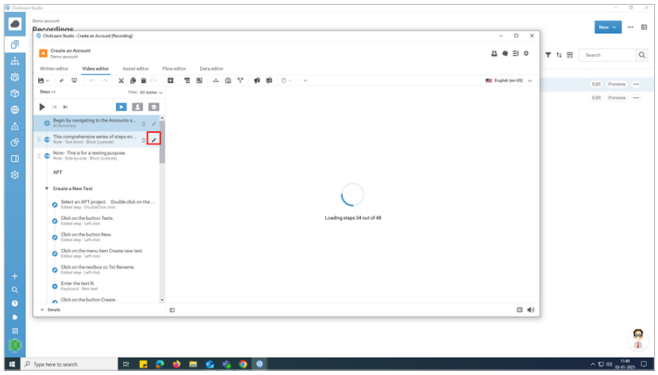
Double click on the gridview cell **NAME** with data **Create an Account.**



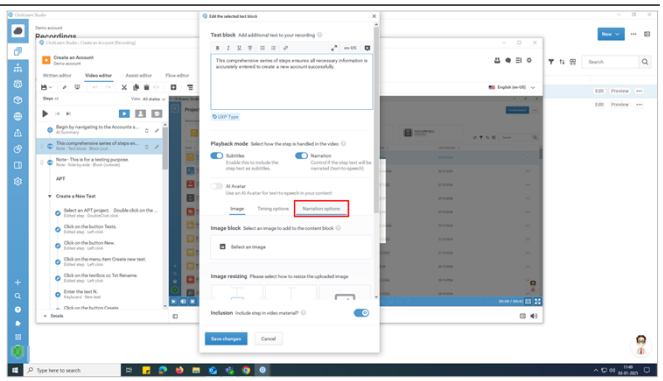
Click on the tab item **Video editor.**



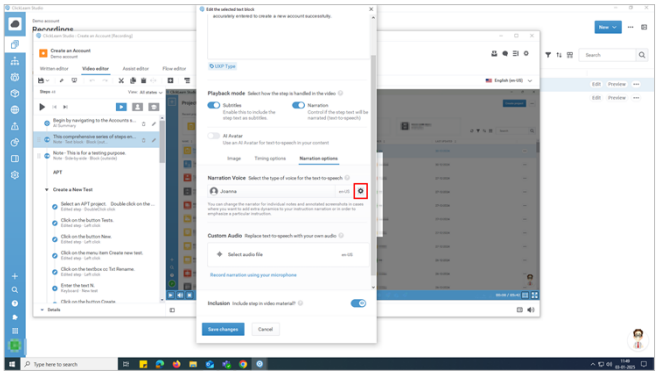
Click on the **Edit** icon of the step.



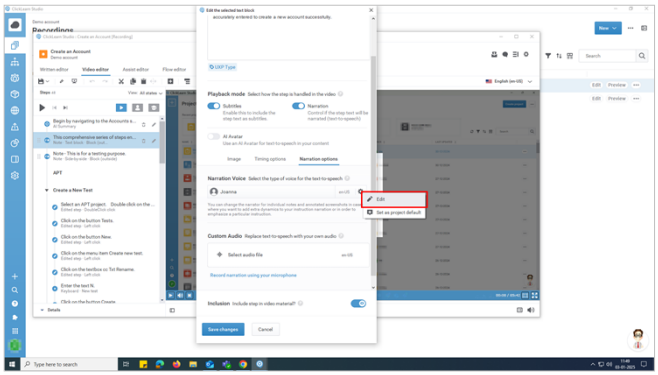
Click on the tab item **Narration options.**



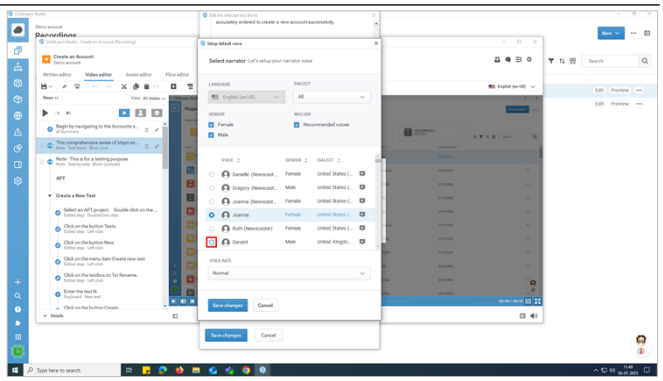
Click on the icon **Setting.**



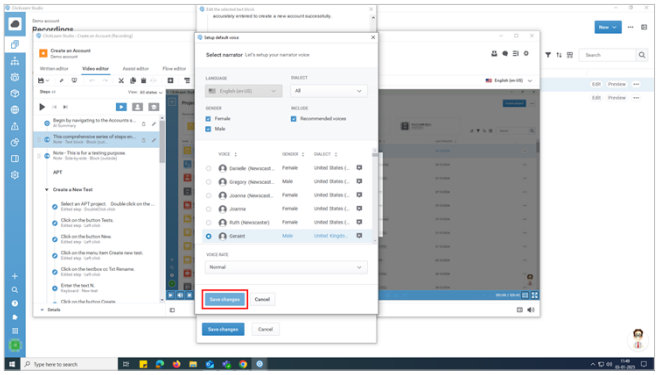
Click on the menu item **Edit.**



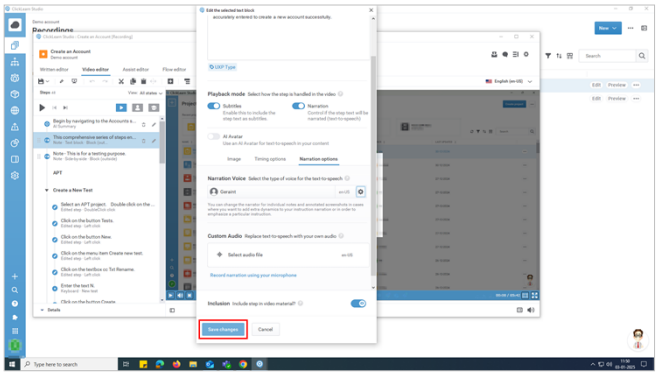
Click on the **radio button** to select a voice of your choice.



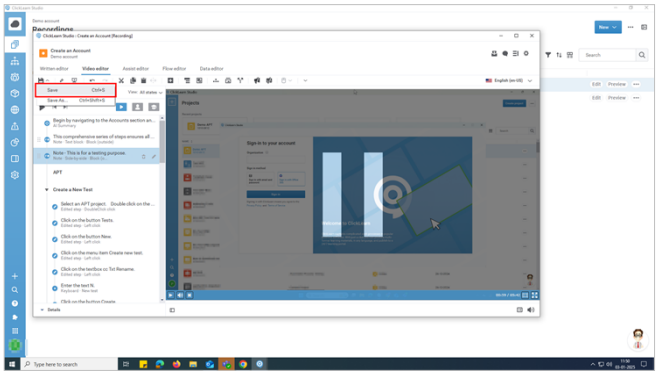
Click on the button **Save changes.**



Click on the button **Save changes.**



Click on the menu item **Save.**
Note: To apply the changes, you must produce and publish your project. Once you publish the project, you will hear the added voice for the selected step.

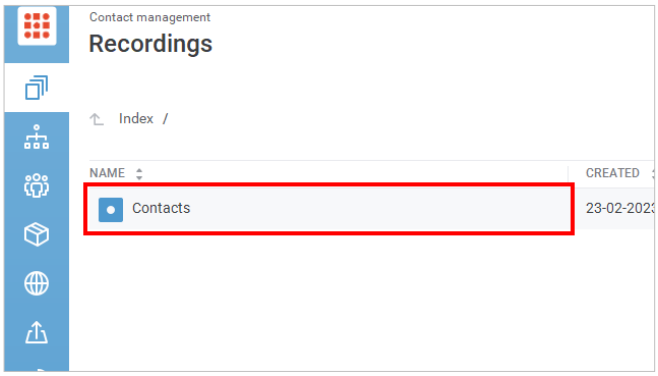


6.7. Customise Audio in Recordings

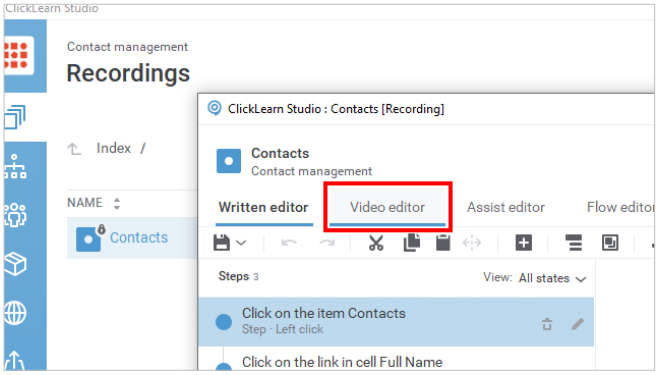
Replace auto-generated narration with your own recorded voice or an uploaded audio file. It can be used for content that requires a specific presenter or tone.

6.7.1. Add Custom Audio to a Recording

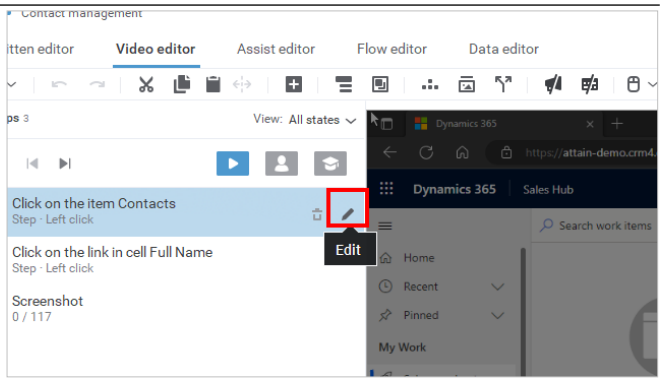
Open the recording in which you wish to add custom audio.



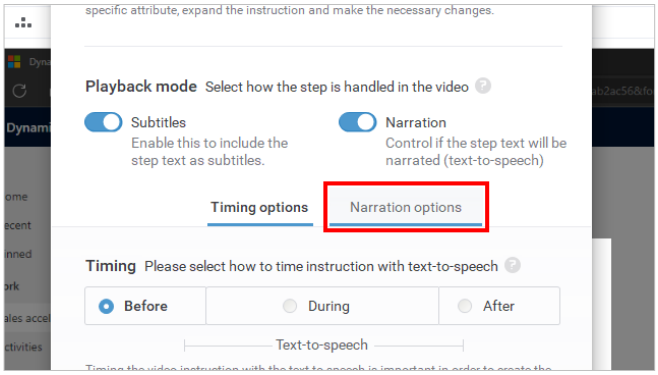
Click on the tab item **Video editor.**



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

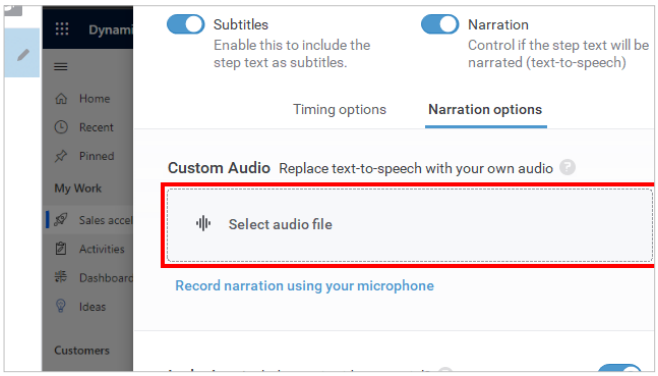


Click on the tab item **Narration options.**

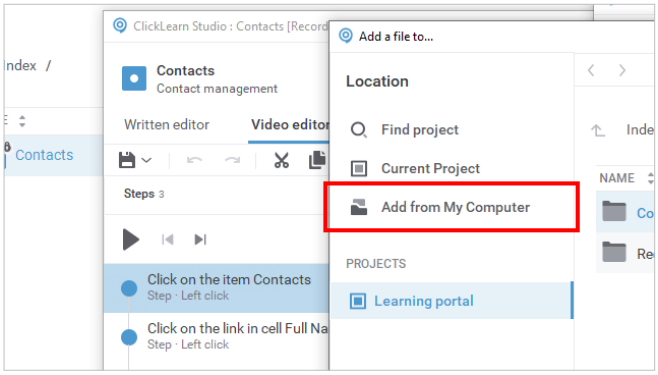


6.7.2. Add custom audio using an audio file

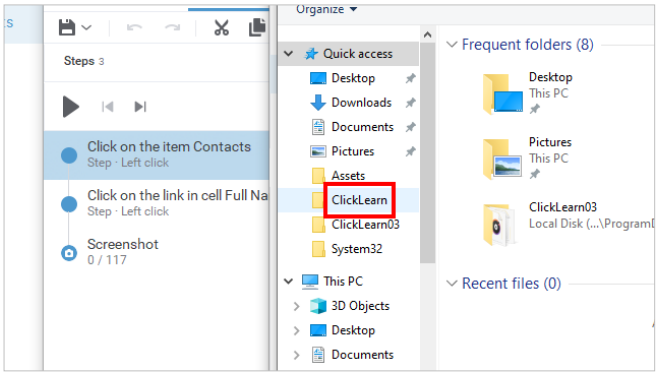
Click on the button **Select audio file.**
This option will allow users to choose an audio file from their local machine for the selected step.



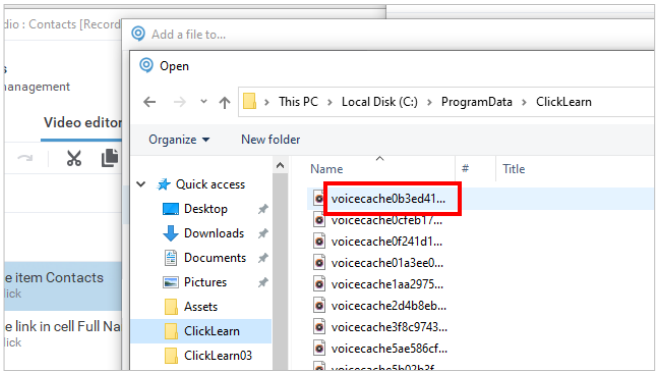
Click on the button **Add from My Computer**.



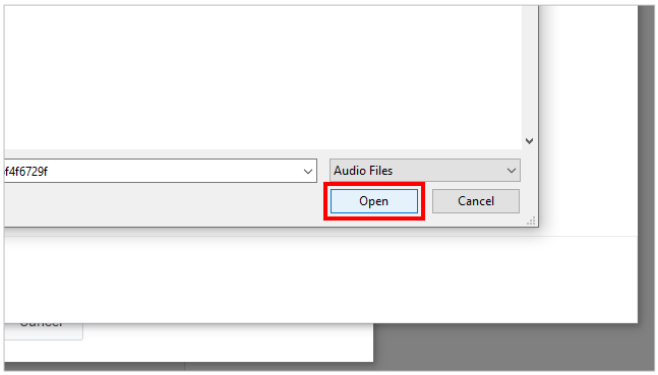
Click on the folder **ClickLearn**.



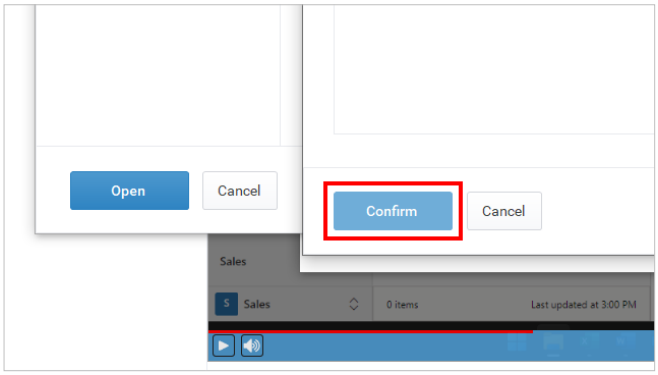
Select an audio file from your machine.



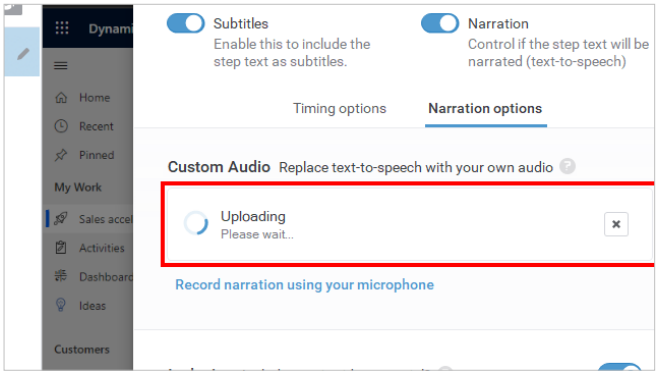
Click on the **Open** button.



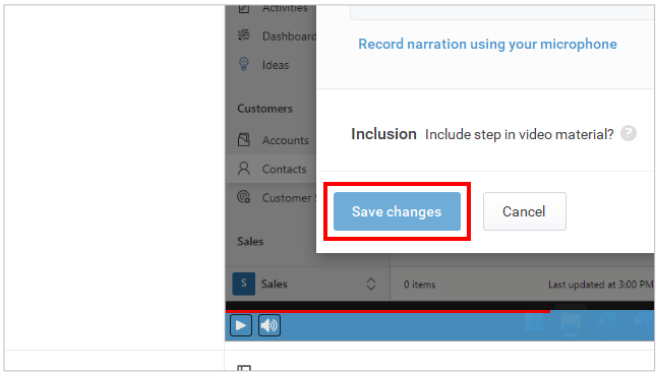
Click on the button **Confirm**.



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

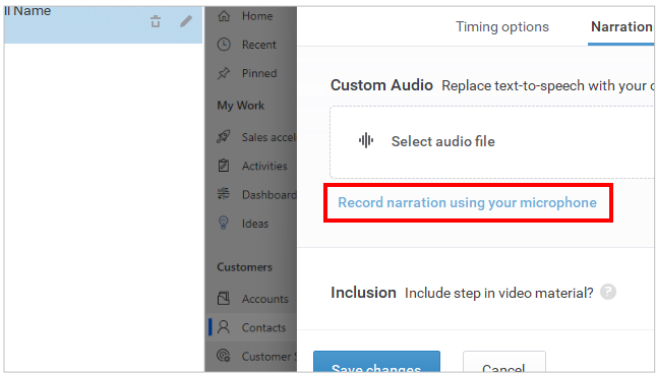


Click on the button **Save changes**.

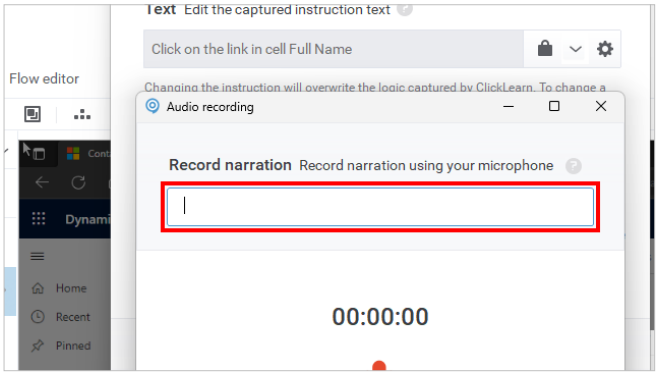


6.7.3. Record voice using a microphone

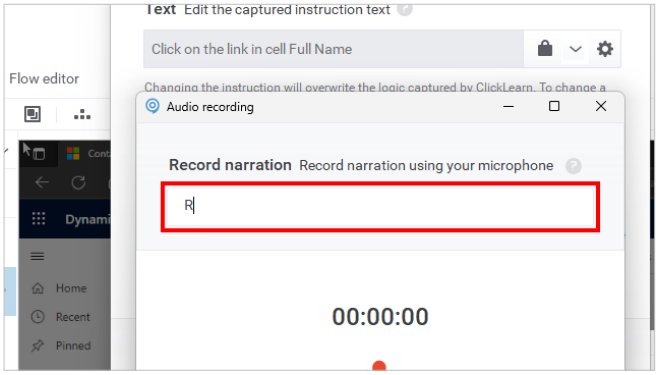
Click on the button: **Record narration using your microphone**.



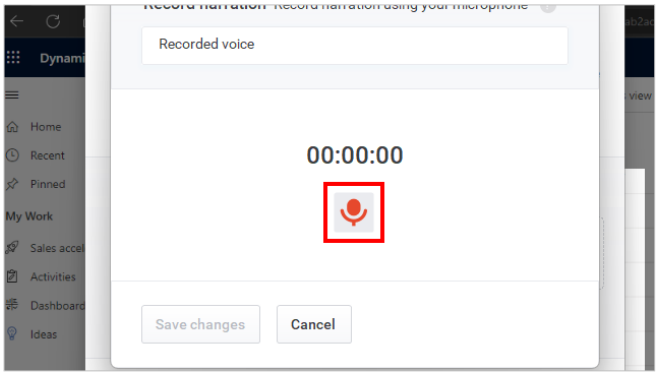
Click on the textbox **AudioName**.



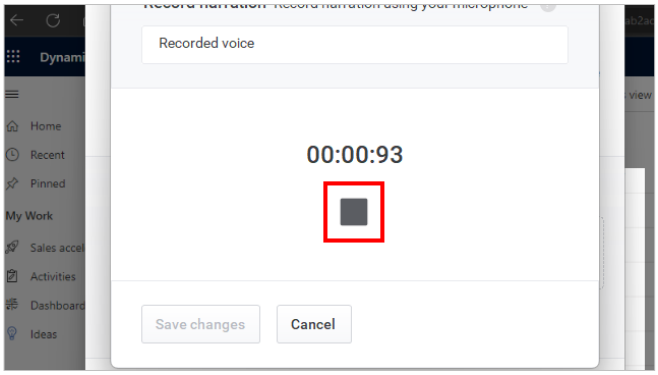
Enter **AudioName**.



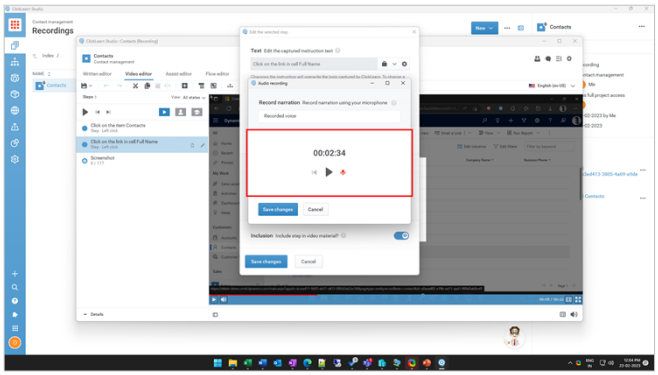
Click on the link icon, **Microphone.**
After clicking the Microphone button, sound from your PC's Microphone will be recorded until you click the stop button.



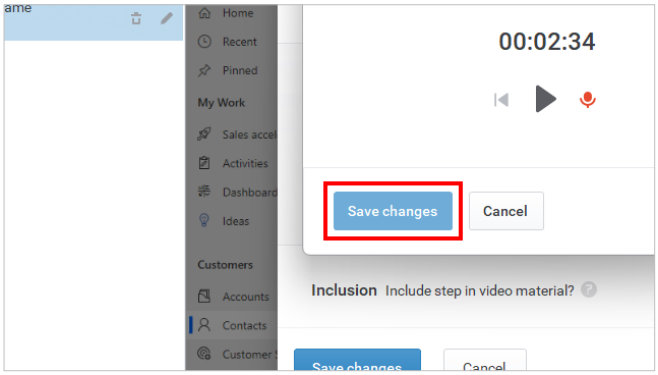
Click on the link icon: **Stop** after you have recorded your voice.



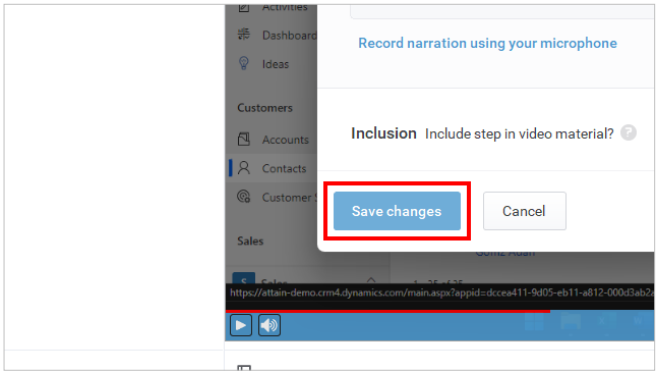
Here, you can playback your audio by clicking on the play button, and if you are not satisfied, you can re-record the audio.



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



Click on the button **Save changes**.



6.8. Generate Summaries with AI

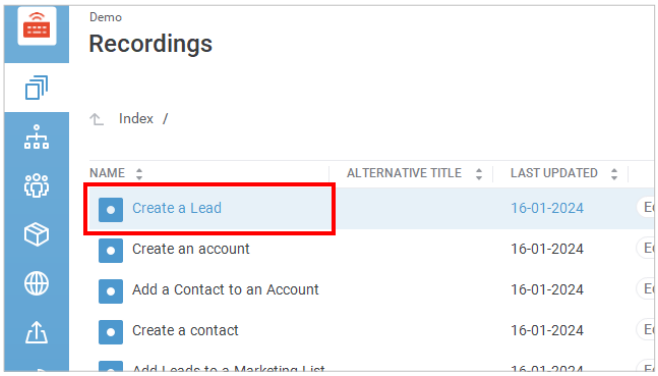
Turn a long recording into a few clear lines, so users know at a glance what a process covers and whether it's worth their time, without scrolling through 200 steps first.

6.8.1. Introduction

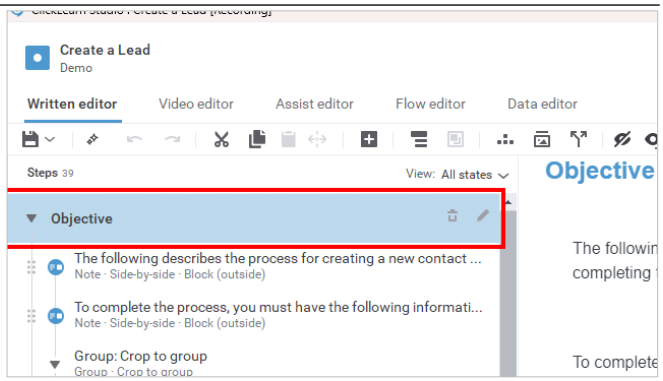
Summarization is the process of creating a concise overview of the recording. It lets the users grasp the main idea of the recording without having to go through all the steps.

For example, if the recording has 200 steps or more, the user can view the summary and get a general idea of what it covers.

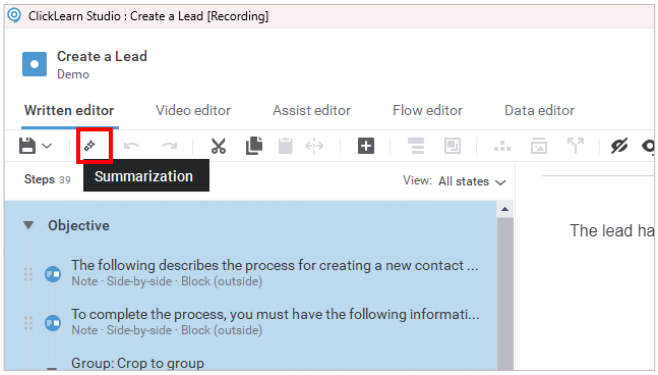
Open the recording for which you would like to create a summarization.
Double-click on the grid view cell **NAME** with data **Create a Lead**.



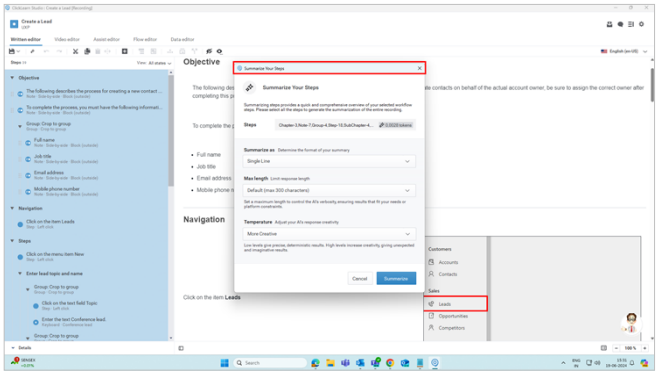
With the **Shift** key pressed, select every step starting from the **Objective**.



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



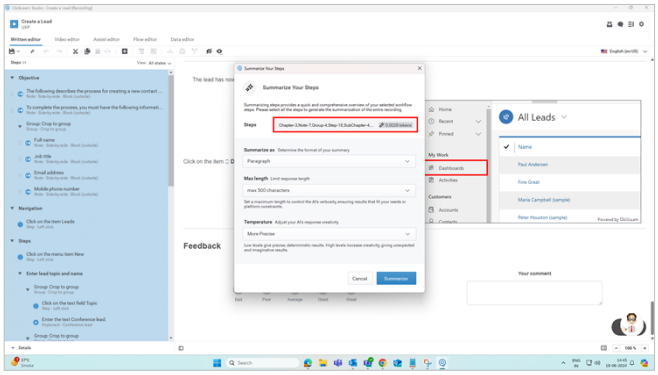
This opens up a new window: **Summarize Your Steps**.



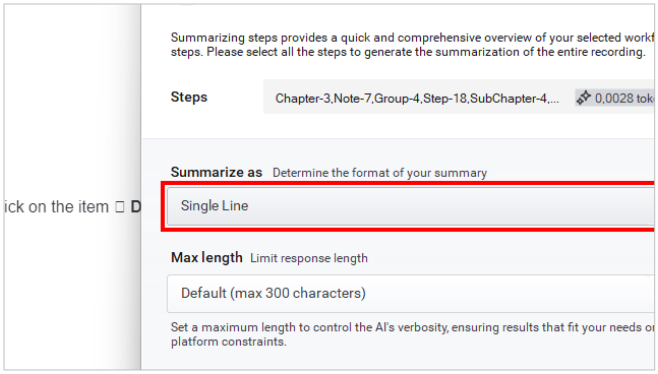
6.8.1.1. Summarization

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

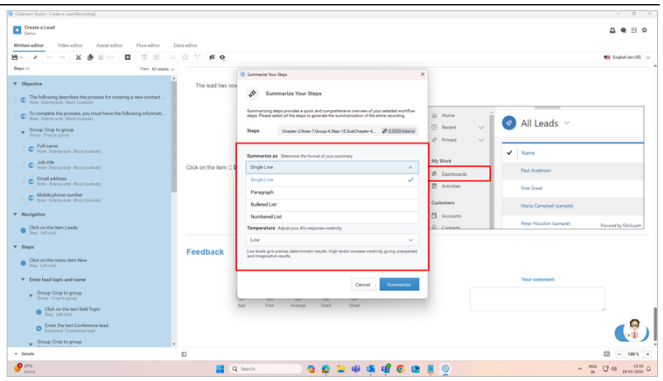
Along with this, it also displays the number of tokens for that particular account.



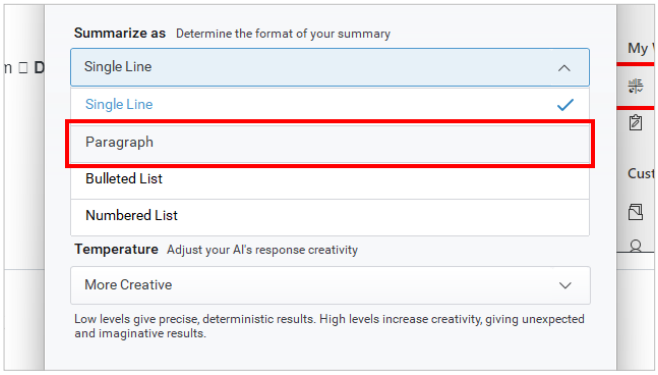
Click on the dropdown **Summarize**.



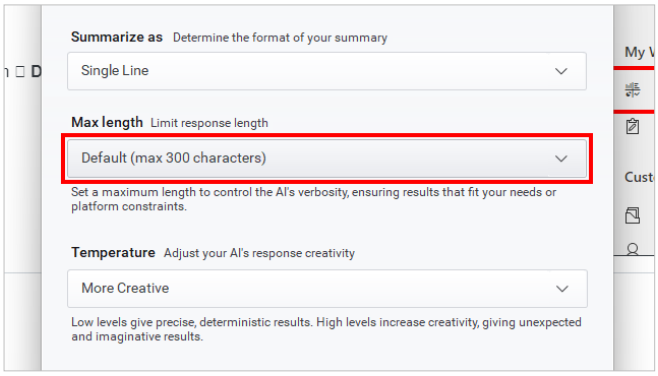
You can determine the format of the summary from the available dropdown options. That is how you would like to display the summary.



In this case, we have selected a **Paragraph** format for a summary.

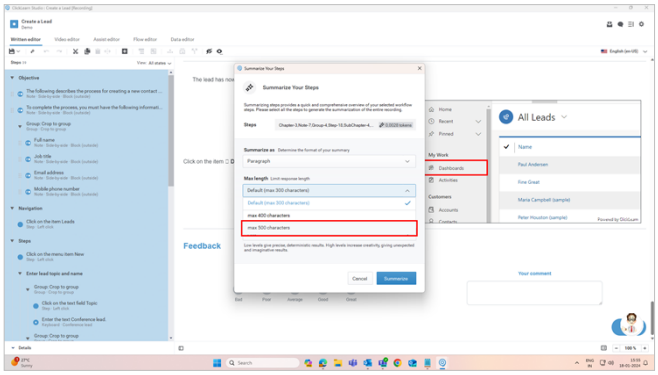


Click on the dropdown **Max Length**.

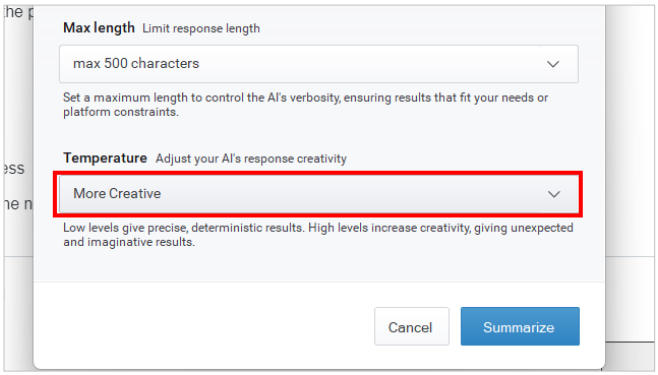


You can set a maximum length to control how the AI responds, ensuring results that fit your needs or platform constraints.

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

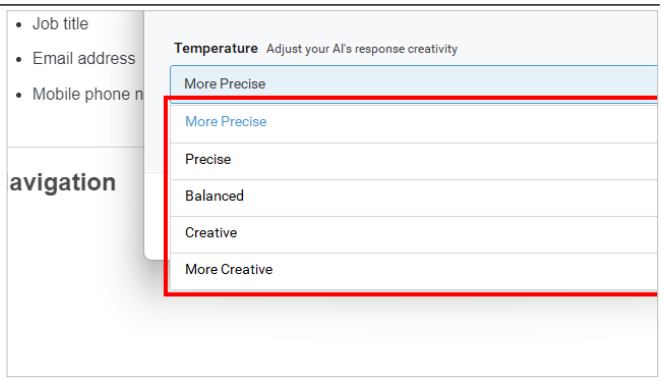


Click on the dropdown **Temperature**.



The temperature setting is a control mechanism that allows you to calibrate the level of creativity in the AI's responses. It offers various options to align with your project's unique demands.

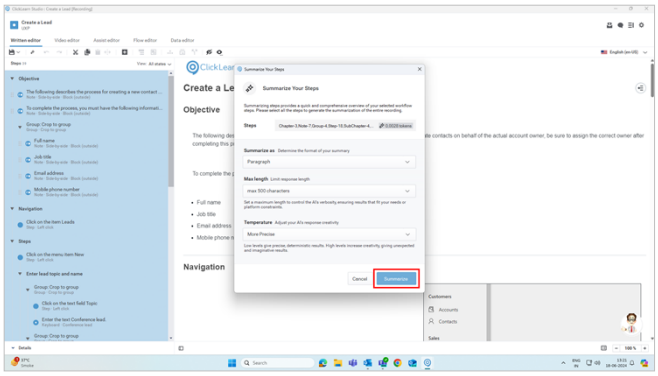
- **More Precise:** This generates responses with high accuracy and detail.
- **Precise:** Delivers responses that are both accurate and well-rounded.
- **Balanced:** Offers responses that maintain an even mix of precision and inventiveness.
- **Creative:** This increases the AI's response to creativity.



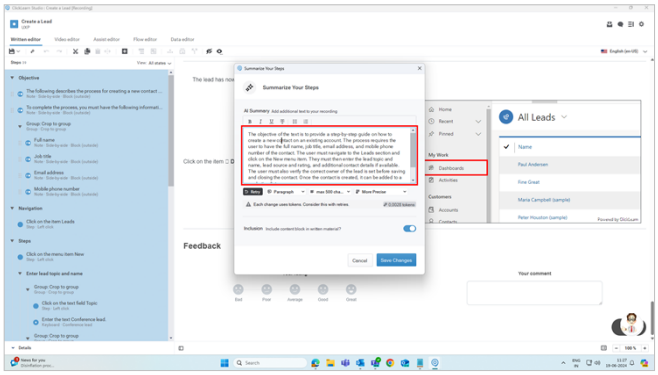
- **More Creative:** This generates more creative responses.

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

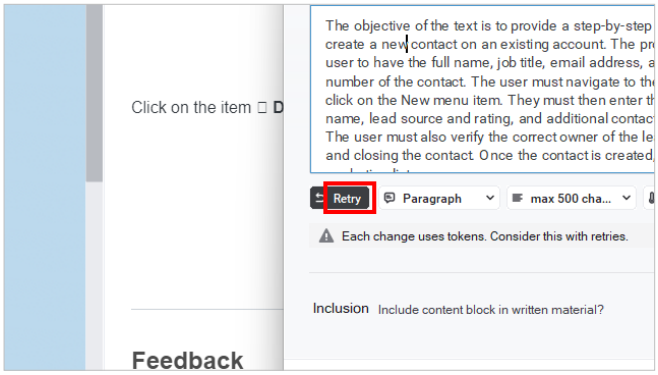
Click on the button **Summarize**.



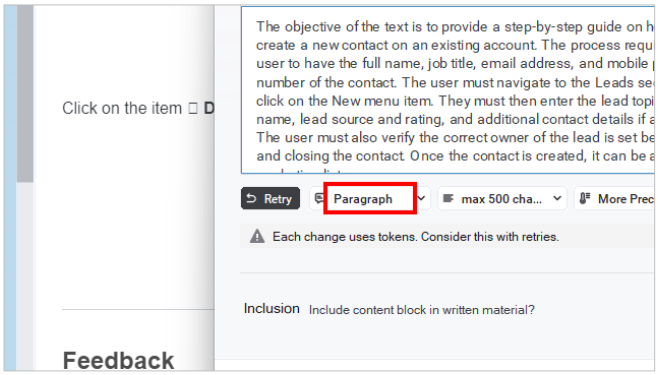
Additional Text: This creates the summary of that particular recording. You can also edit and modify the summary based on your requirements.



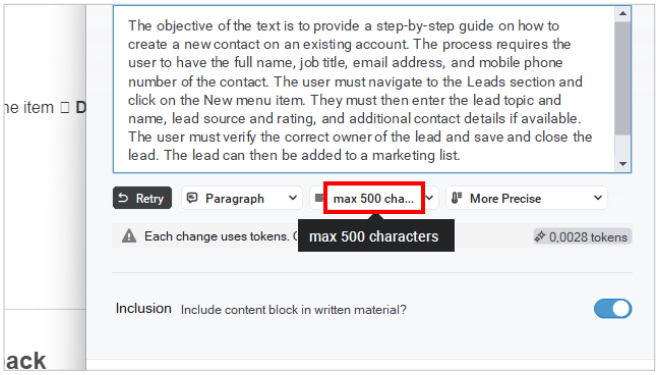
If you are unsatisfied with the current summarization, you can use the **Retry** option to create a new summarization.



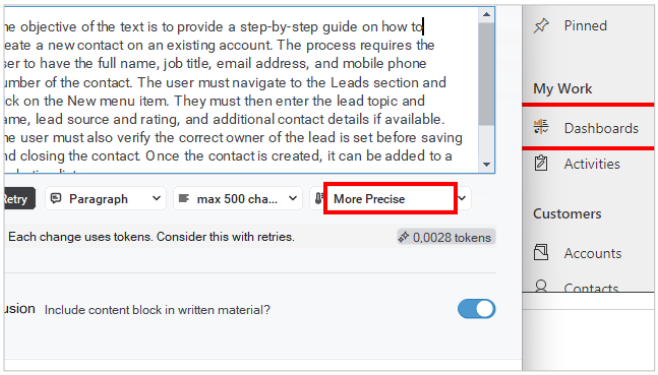
Click on the label **Paragraph**, which allows you to change the format of your summary.



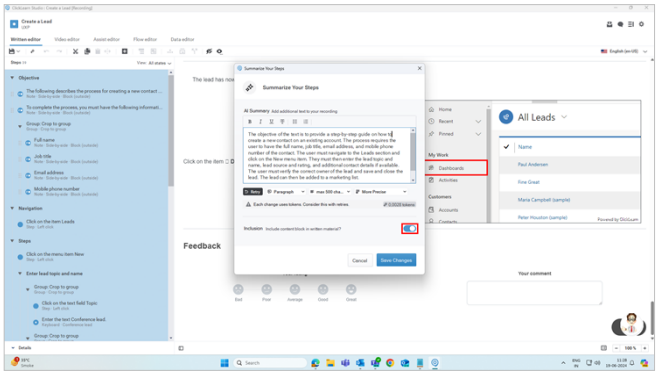
Click on the label **max 500 characters** to adjust the maximum response length.



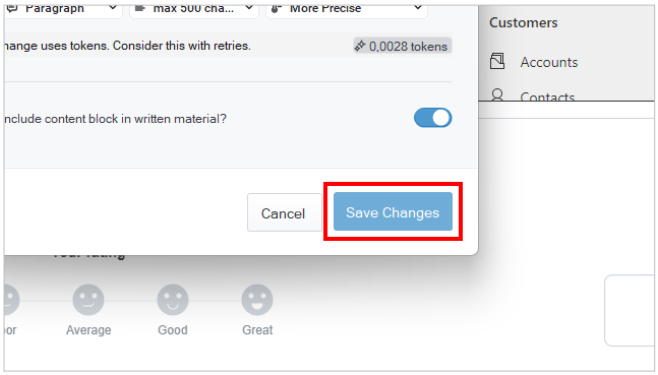
Click on the label **More Precise** to adjust the temperature of the AI's response.



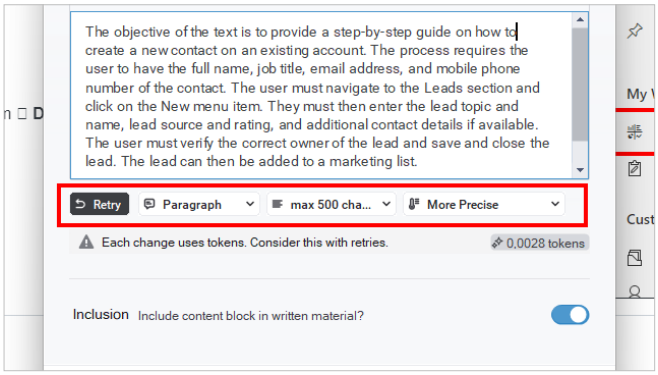
The **instruction off** switch lets you choose whether to include or exclude the summary from the recording.



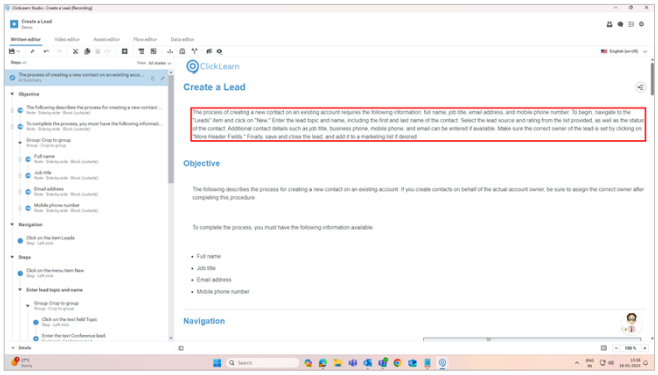
Click on the button **Save Changes**.



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

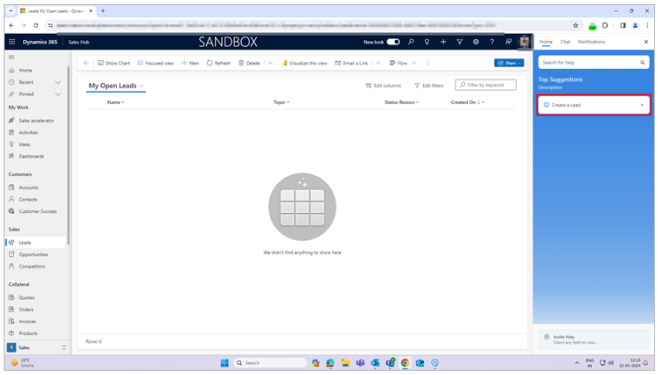


The recording starts with a summary and then displays the list of steps. This is how the summary looks in a recording.

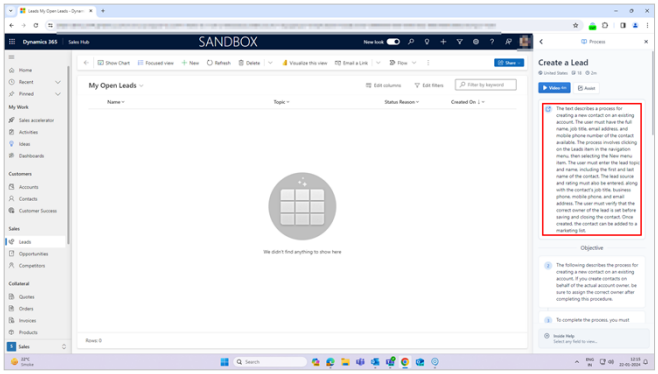


6.8.1.2. Recording in UXP Panel

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.



6.9. Generate Narration from PowerPoint

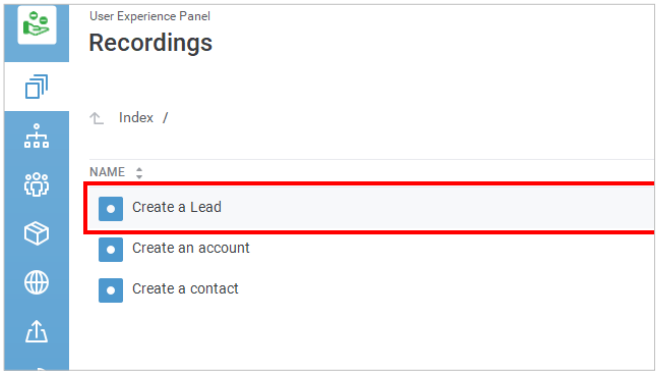
Convert narration written in PowerPoint speaker notes into ClickLearn audio, so existing presentation content contributes directly to recording narration without rewriting.

6.9.1. Introduction

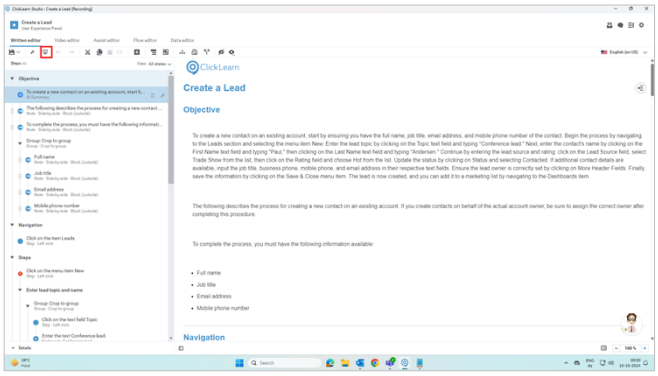
ClickLearn Attain offers a robust feature for adding narration to PowerPoint presentations. This feature lets you enhance your presentations with voice-overs, making them more engaging and informative.

Open the recording to which you wish to add the PPT narration.

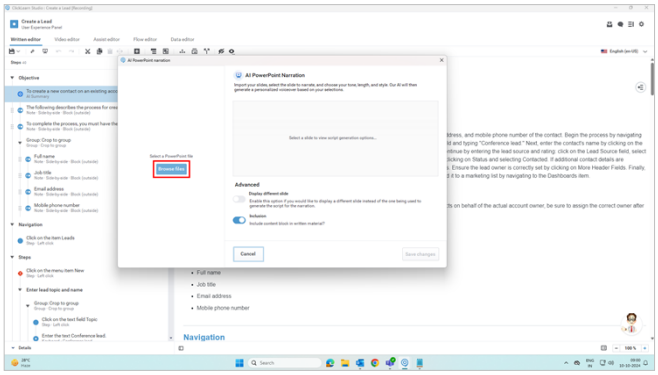
Double-click on the grid view cell **NAME** with data **Create a Lead**.



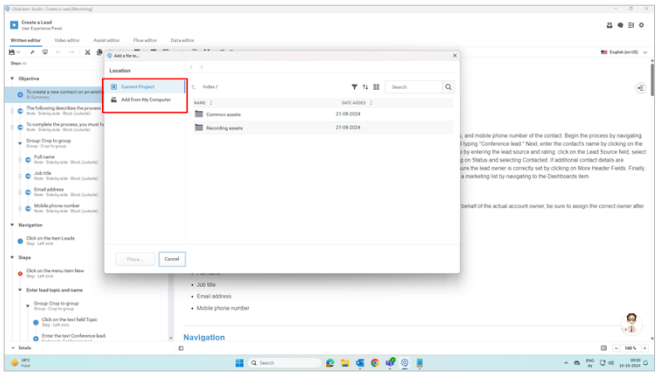
Click on the button **PPT Narration**.



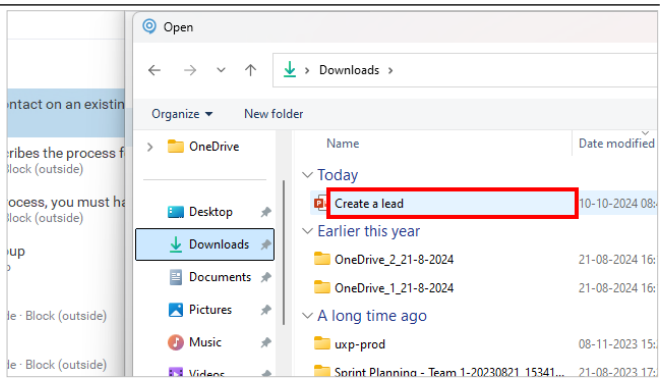
Click on the button **Browse files**.



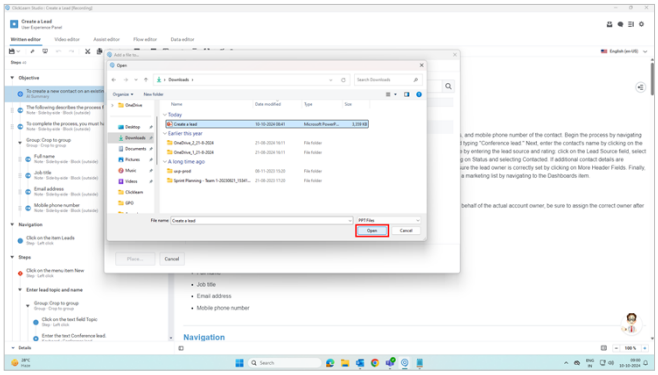
The browse option offers two options: select a file from the current project or add one from your local system.



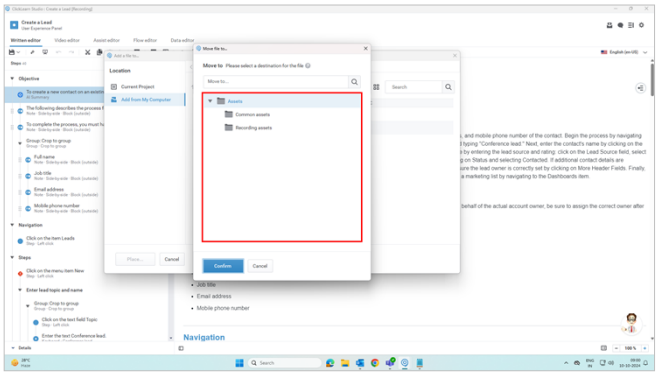
Select the file to upload.



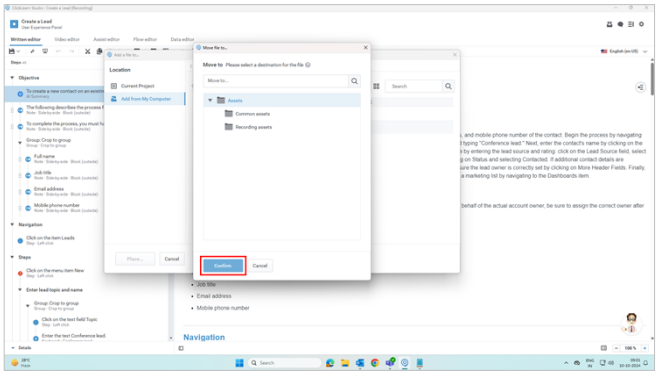
Click on the **Open** button.



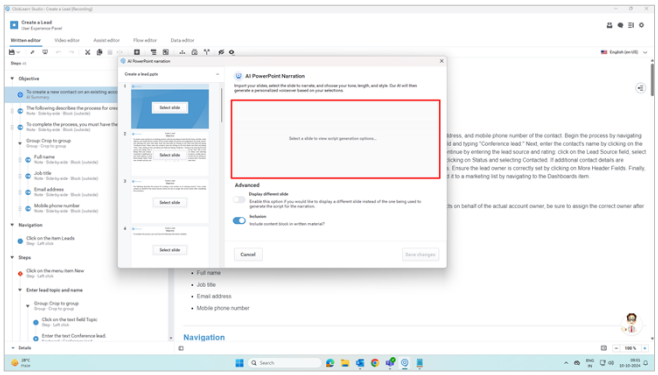
It asks you to select a location to save the file: assets, common, or recording assets.



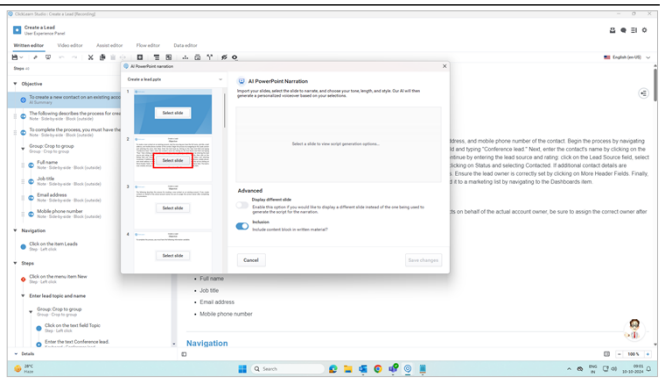
Click on the button **Confirm**.



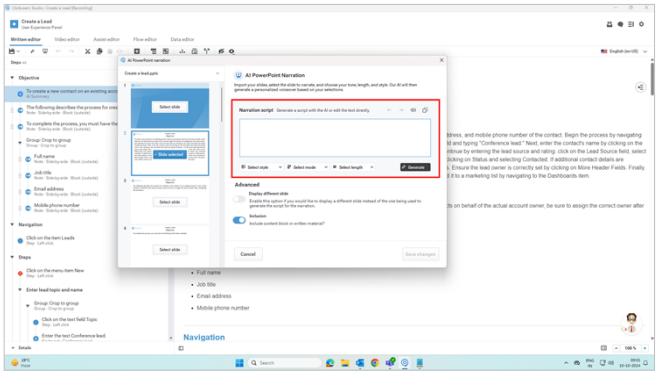
You need to click on a slide to enable the options behind this panel.



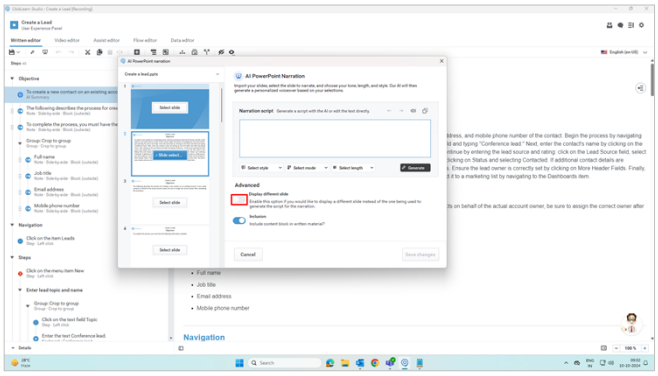
Click on the button **Select slide**.



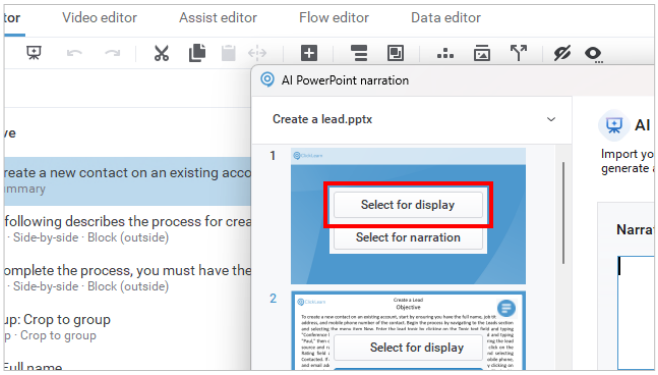
The narration script is now enabled.



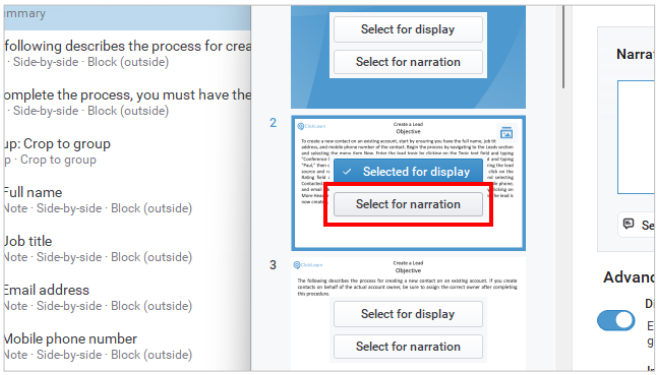
Click on the toggle switch **Different Slide**. By enabling this option, you will see buttons on each slide. This option allows you to display a different slide instead of the one used to generate the script for the narration.



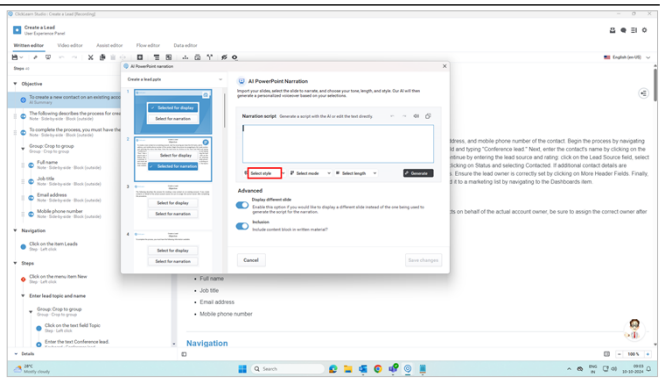
You can choose one slide for display purposes and another for narration. It's not possible to select both options for a single slide. Therefore, you need to assign each slide to a specific option. For example, let's choose the first slide for display and the second for narration.
Click on the button **Select for display**.



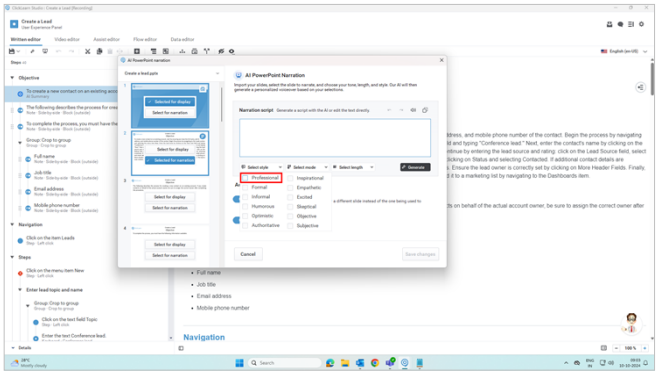
Click on the button **Select for narration**.



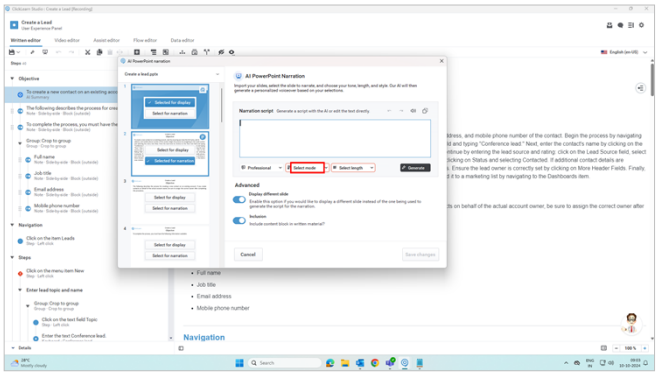
Click on the label **Select style**. You can select the style for narration based on your project requirements.



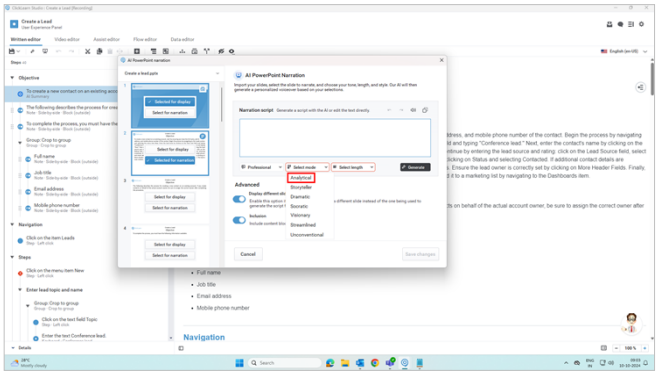
Click on the checkbox **Professional**.



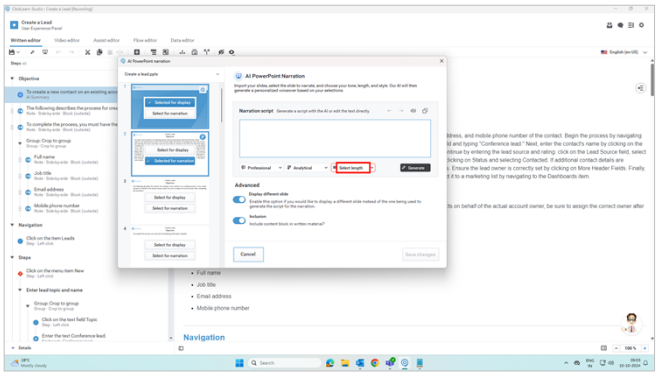
Click on the label **Select mode**.



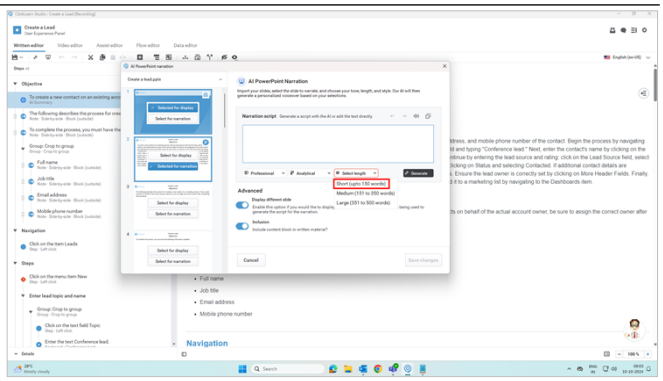
Click on the label **Analytical**.



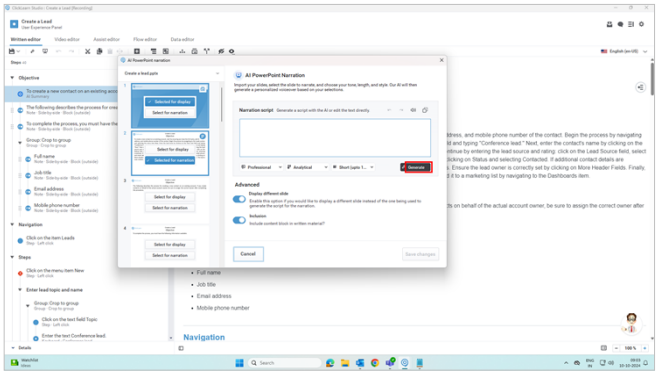
Click on the label **Select length**.



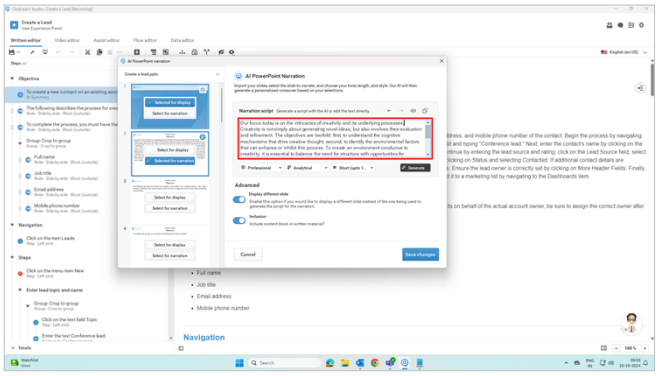
Click on the label **Short (upto 150 words)**.



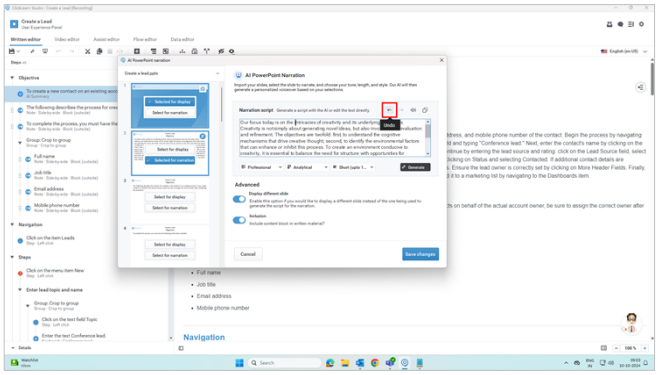
Click on the label **Generate**.



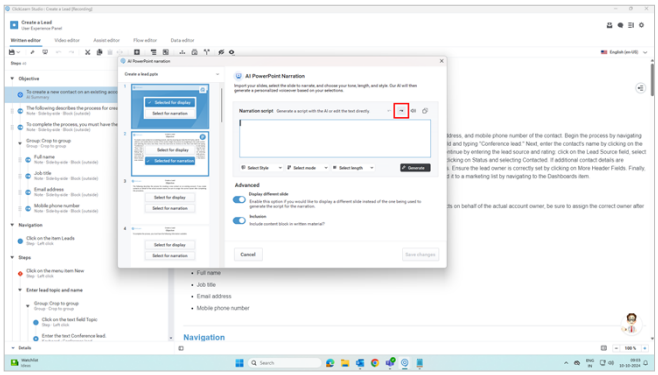
AdditionalText: This generates the narration script.



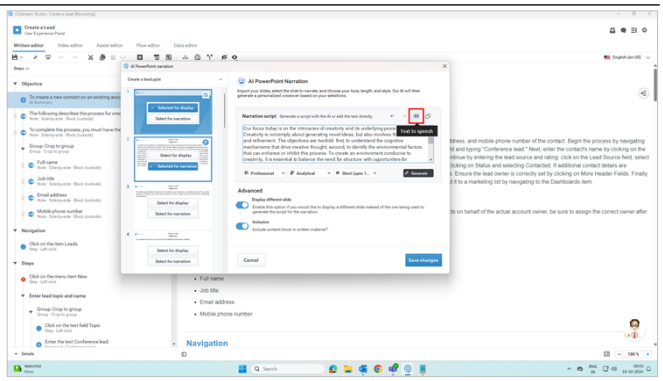
To undo the narration, click on the **Undo** icon.



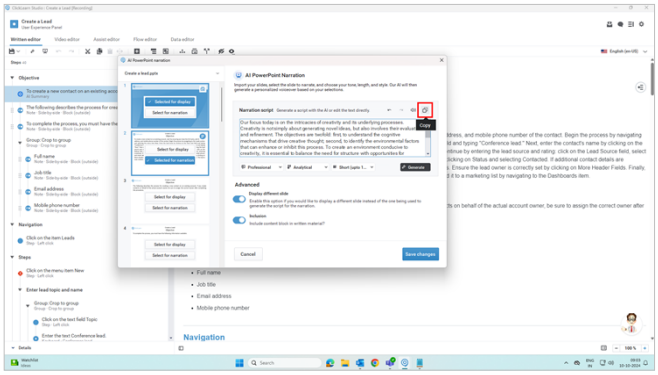
Click on the icon **Redo** to redo the narration.



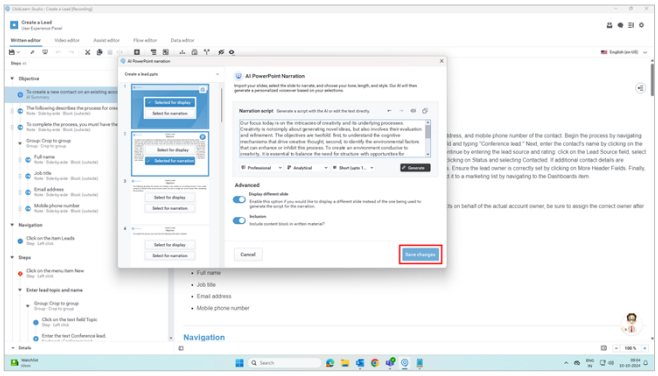
Click on the icon **Text to speech** for the narration to read.



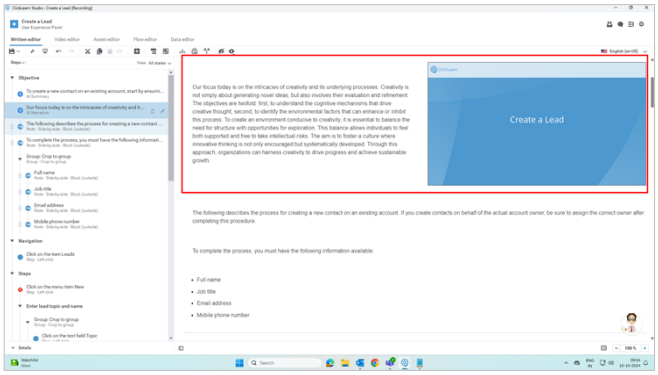
Click on the icon **Copy** to copy the narration.



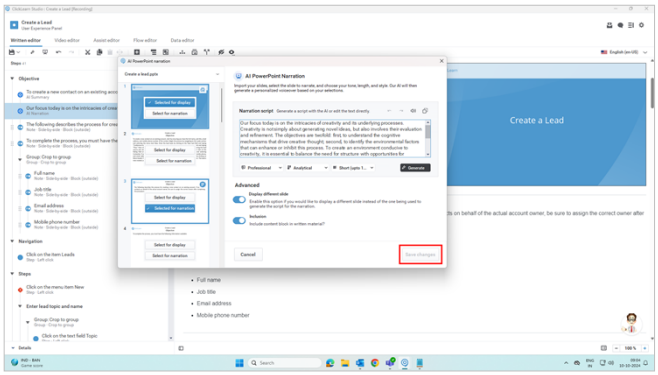
Click on the button **Save changes**.



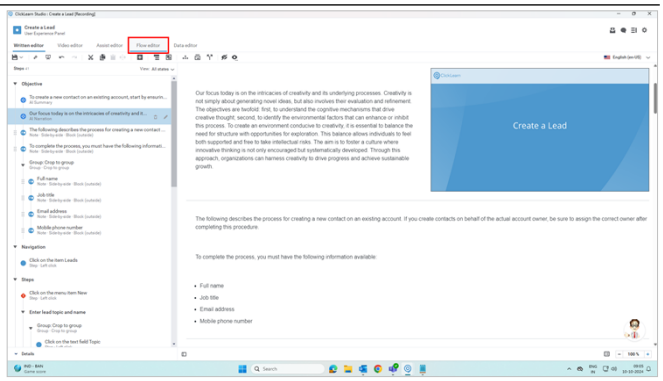
The narration is now added as a step in the recording.



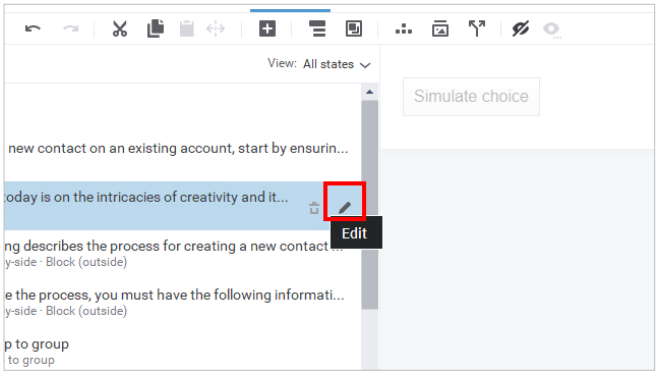
If you make any changes to the slide, you must click the generate button. The **Save changes** button will only activate after you do so.



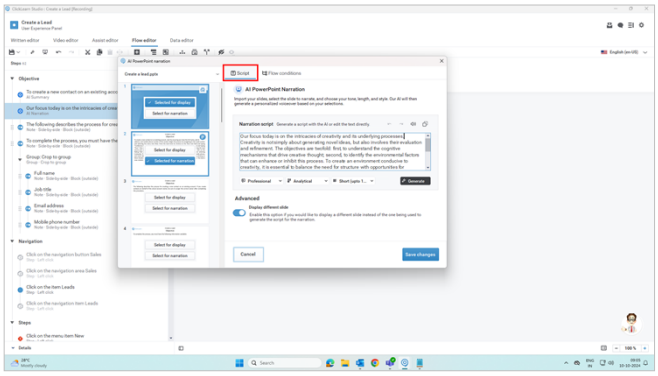
Click on the tab item **Flow editor**.



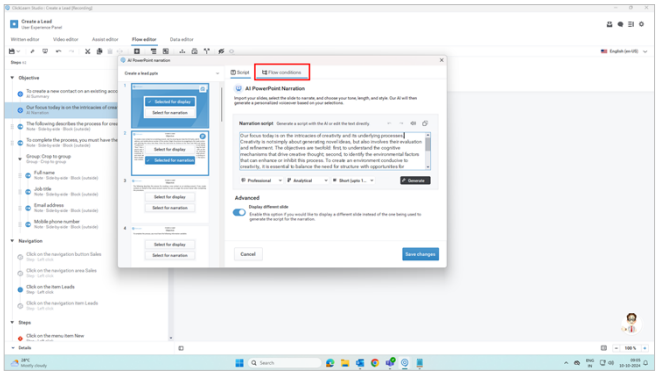
Click on the **Edit** icon of the step.



You have two options here: one is **Script**, and the second is **Flow conditions**.

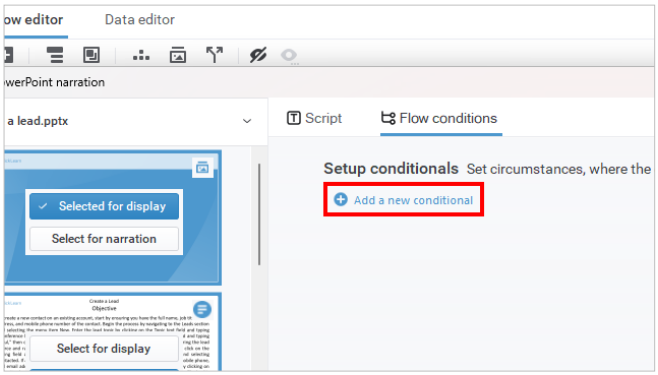


Click on the tab item **Flow conditions**.

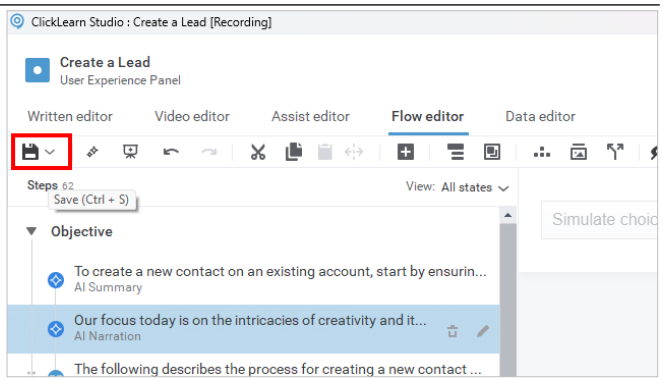


You can select the condition for a particular step from the flow conditions and regenerate the narration.

Click on the label **Add a new conditional** to add a condition for the step.



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



6.10.Copy Content From a Published Project

Pull approved content from a published project into a new one, so you build on validated content rather than starting from scratch.

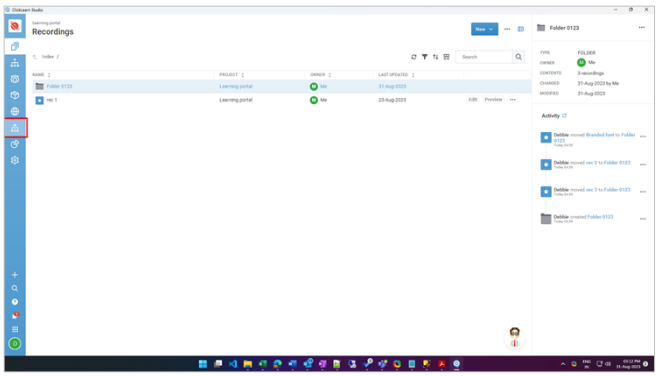
6.10.1. Introduction

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.

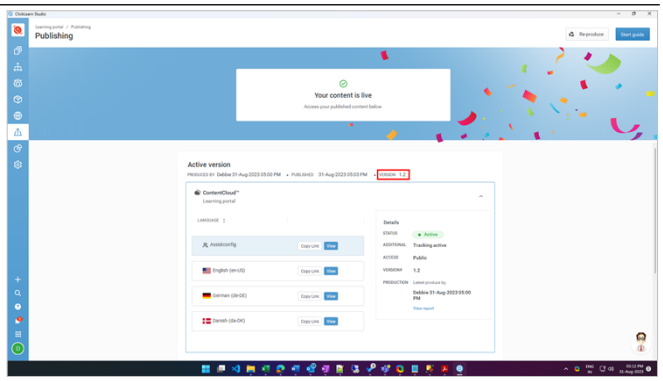
6.10.2. Procedure

6.10.2.1. Source project

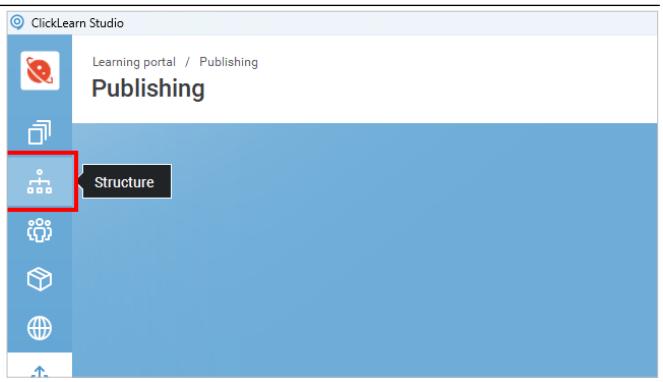
Click on the button **Publishing**.



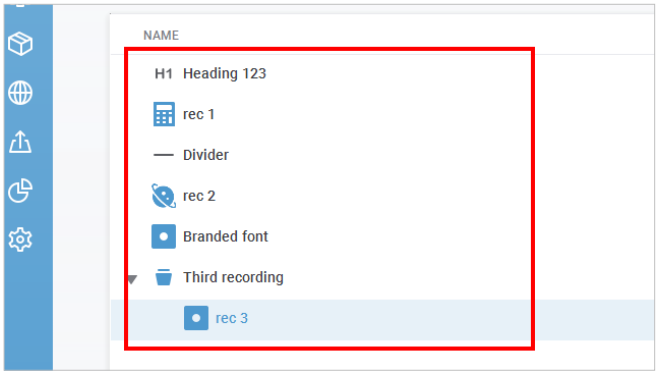
This project has been produced and published, and the active version is **1.2**.



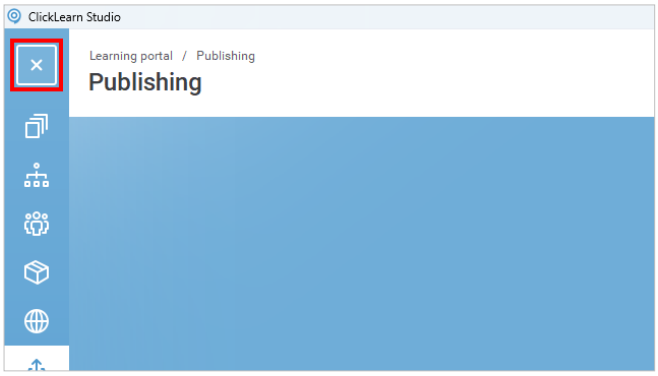
Click on the button **Structure.**



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

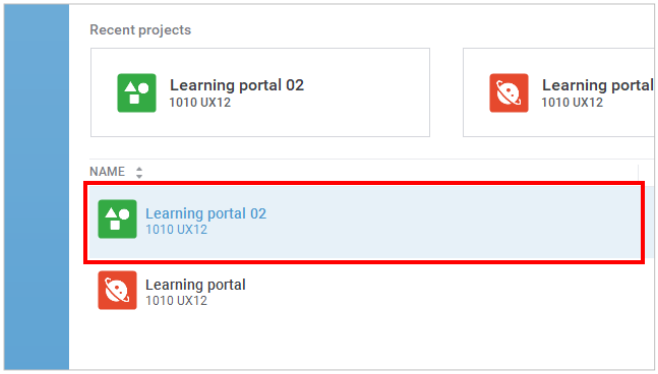


Click on the button **Close project.**

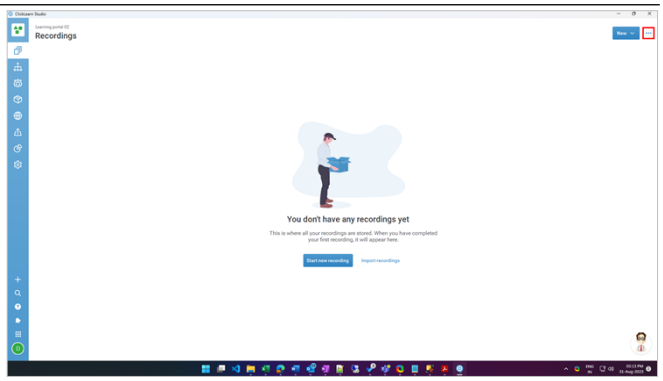


6.10.2.2. Destination project

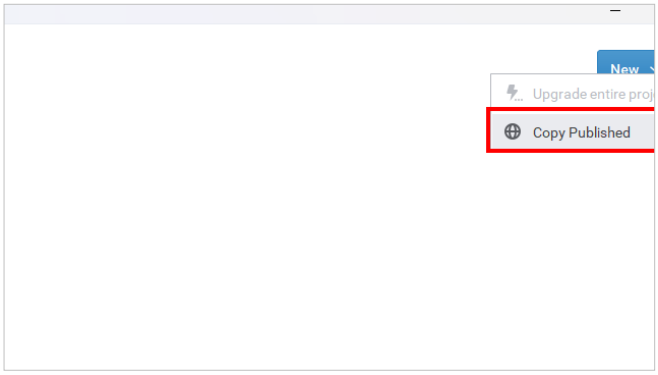
Open the project where you want to import the recordings published in the previous project's version 1.2.
Double-click on the grid cell **NAME** with the value **Learning portal 02.**



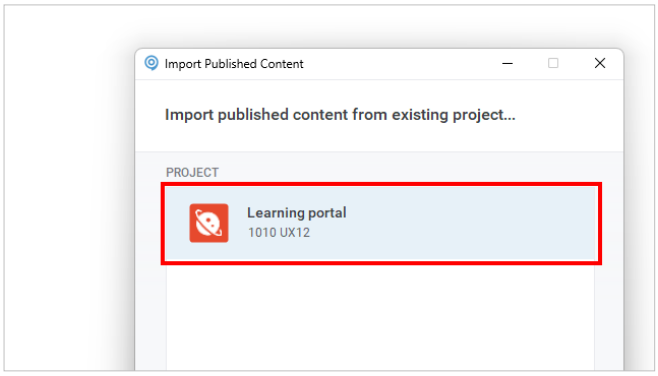
In the recordings screen, click on the button **More.**



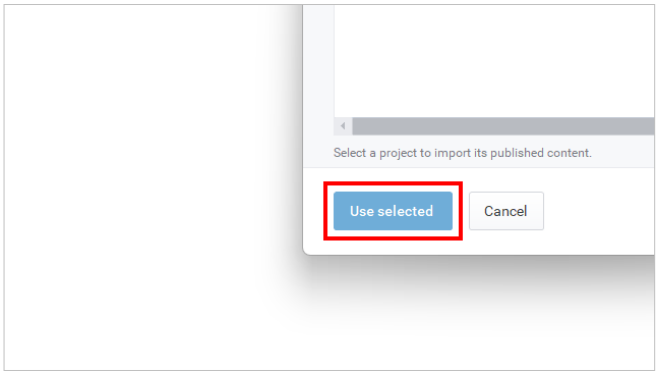
Click on the menu item **Copy Published.**



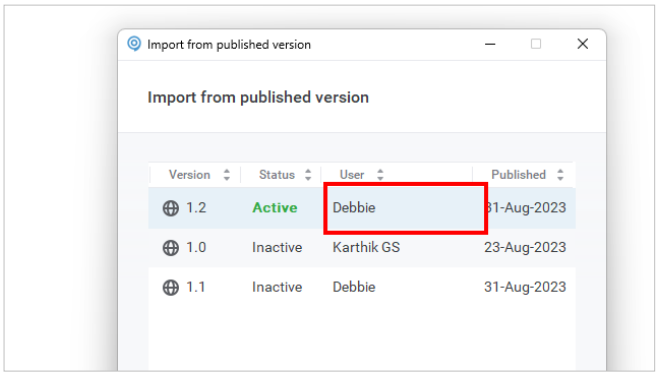
Select the source project.
Click on the item **Learning portal.**



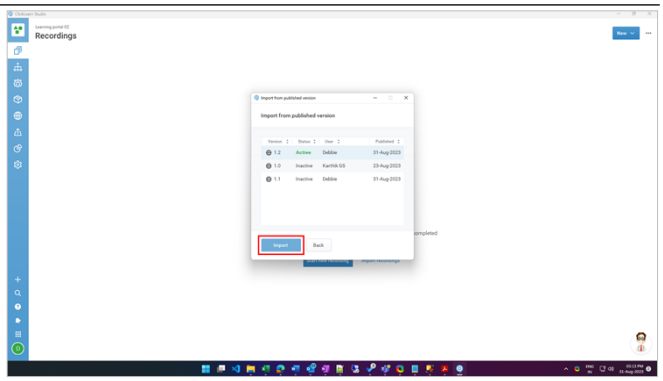
Select the version of the published version from which you wish to import.



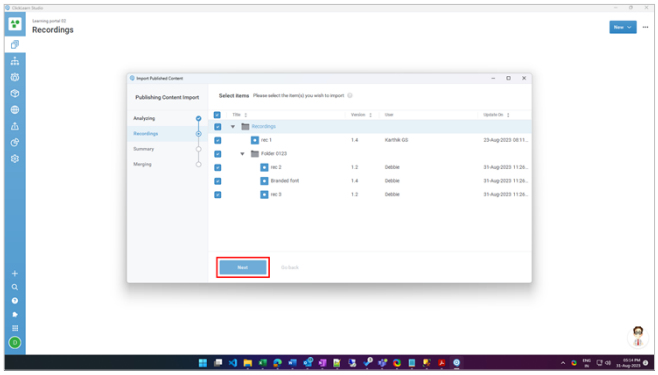
Click on the cell **User** with the value **Debbie.**



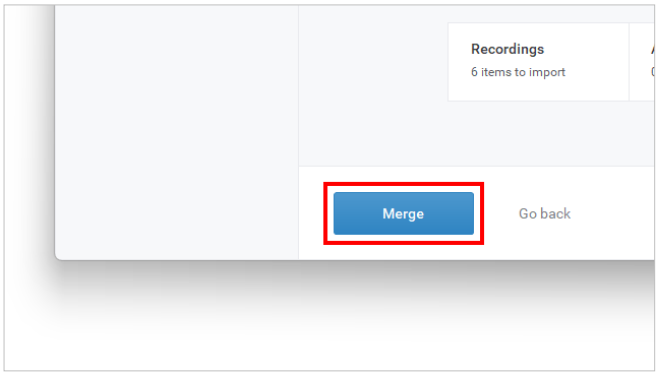
Click on the button **Import.**



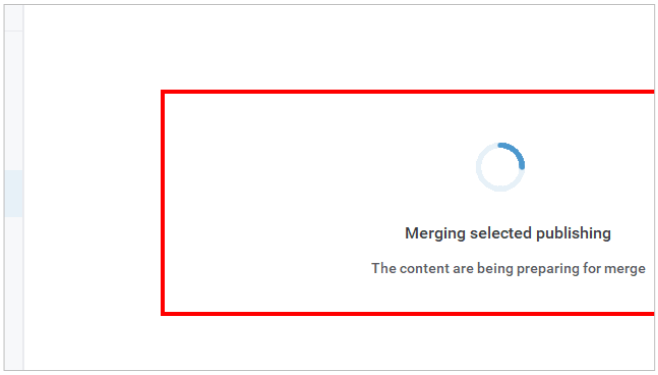
Click on the button **Next.**



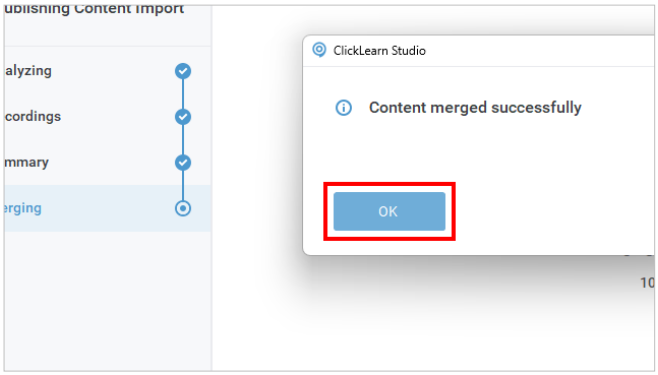
Click on the button **Merge.**



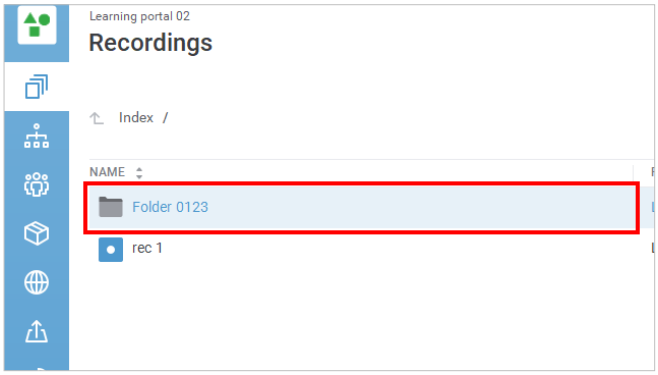
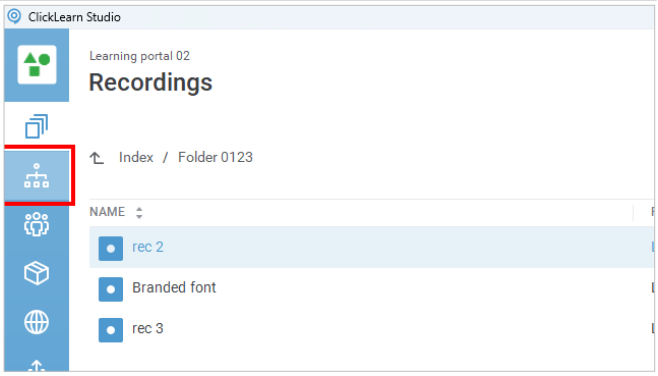
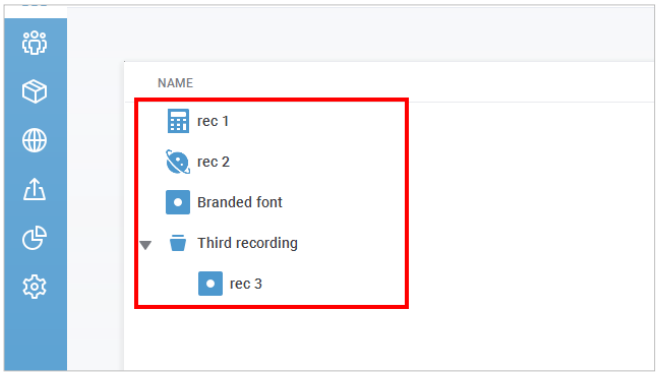
Click on the panel.



Click on the button **OK.**



6.10.2.3. 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.	

7. Replay

7.1. What is Replay and When to Use It

Keep your recordings accurate after a system update without re-recording from scratch. Replay refreshes screenshots and step data automatically in under 15 minutes.

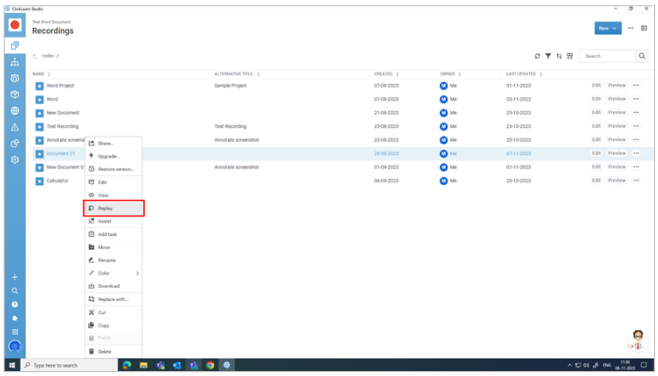
7.1.1. Introduction

When changing or upgrading your business systems, ClickLearn Attain can update your business processes automatically. Replay is a feature that re-records your business processes to keep your documentation up-to-date.

Note: An essential prerequisite for using Replay is you must start the same application you used when you made the recording.

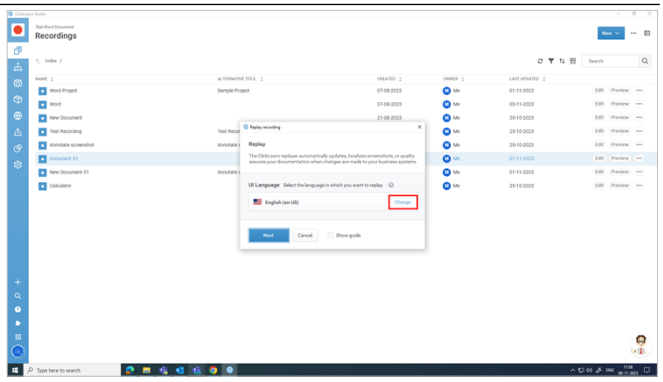
7.1.1.1. Steps to replay

Start the required application. Select the recording for which you want to start the Replay. Right-click on the selected recording and click on the button **Replay**.

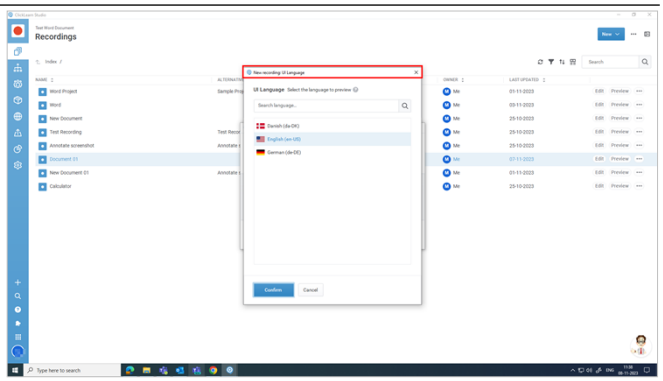


This opens up with a new dialog box: Replay recording. If your project has multiple languages, you can choose the language you want to replay for.

Click on the button **Change**.



This opens with a new dialog: **New recording: UI Language**. This shows the list of languages you have in your project. Select the language you wish to replay your recording, click Confirm, and click Next. Click on the start replaying button.



Note: The current screen content of your recording will be reset and recaptured during the Replay. Once you start the Replay, it displays a warning sign not to touch the mouse or keyboard. You must wait until the Replay is completed successfully. After a successful Replay, it shows a pop-up message as the Replay was completed successfully. In case an error occurs during the Replay, it will display the error message, which you can skip or continue the Replay.

7.2. Replay in a different language

Update translated recordings after a system change without re-translating from scratch. Replay the original language first, then apply to each language variant.

7.2.1. Introduction

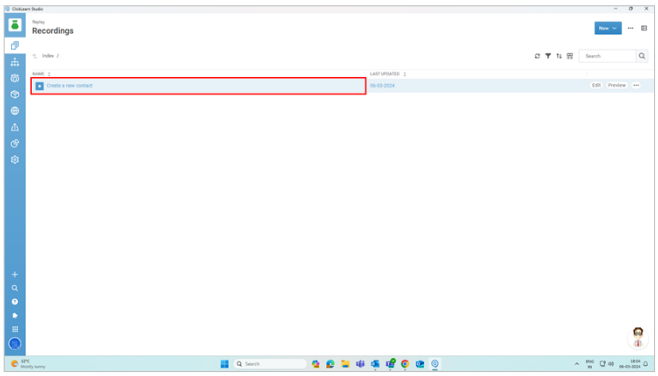
ClickLearn Attain allows you to translate your recordings into any language you choose.

For example, you can record in English and replay that recording in African.

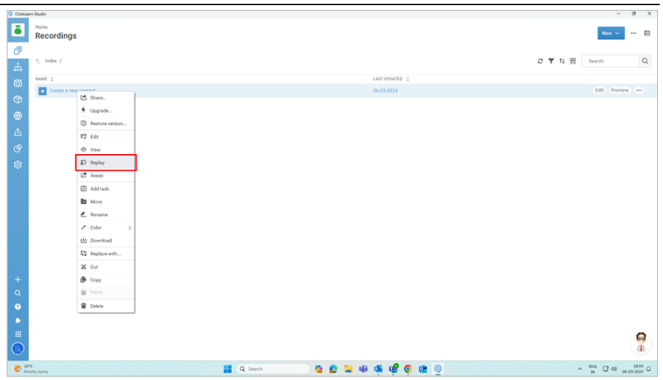
7.2.1.1. Steps to replay recording in a different language

You must select the recording you wish to replay.

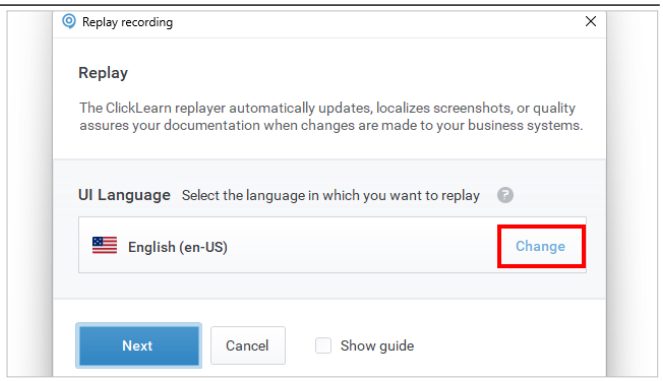
Right-click on the grid view cell **NAME** with data: **Create a new contact**.



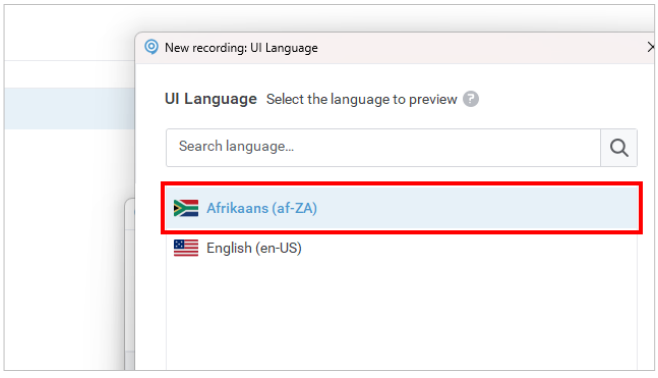
Click on the menu item **Replay**.



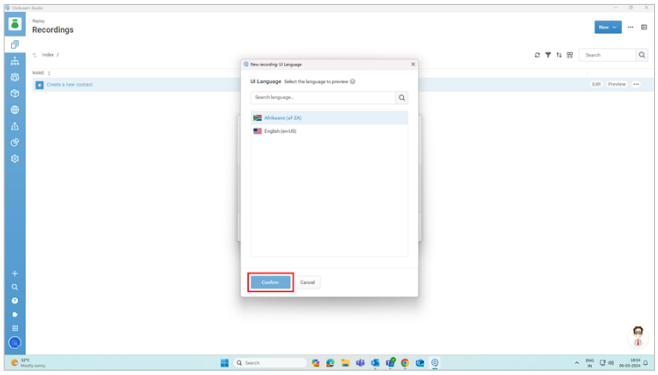
Click on the button **Change**.



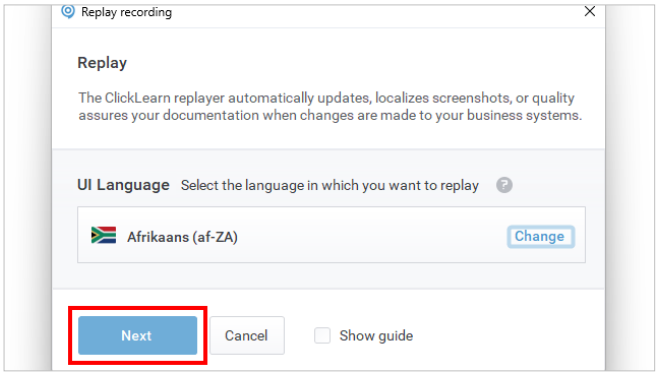
Click on the tree node **Afrikaans (af-ZA)**.



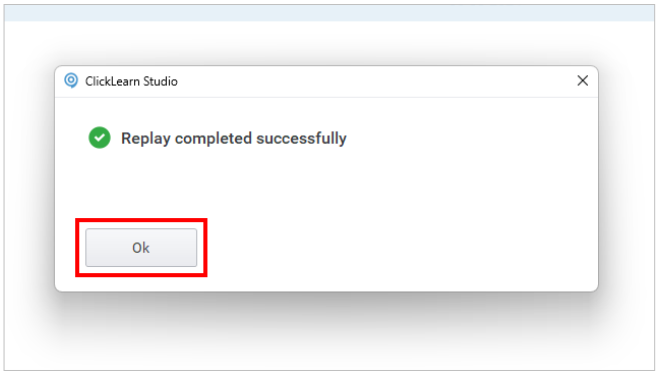
Click on the button **Confirm**.



Click on the button **Next**.



This will start the replay of the recording. Once the replay is completed, it pops up with a new dialog box indicating the replay was completed successfully. Click on the button **Ok**.



7.3. Troubleshoot: Replay Fails Immediately

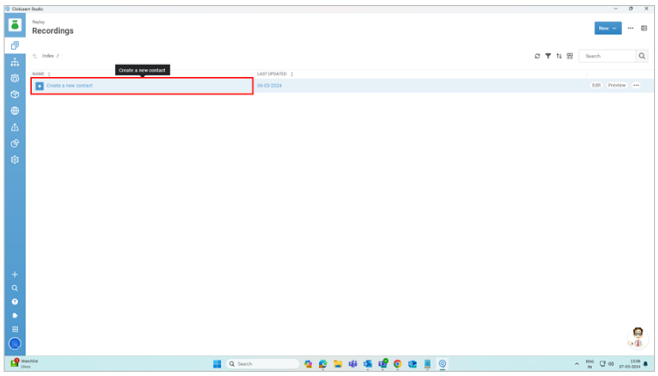
Diagnose and report a failed replay, so support can resolve the issue without you losing time hunting for the cause.

7.3.1. Introduction

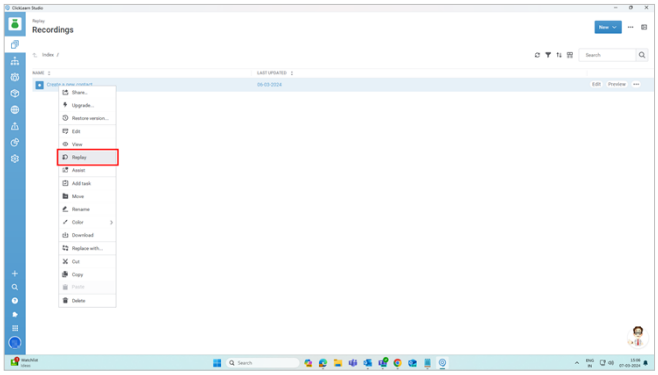
One of the most common reasons the replay fails is when the application is not started.

In this example, we have intentionally not started the application and will try to perform the replay.
You must select the recording you wish to replay.

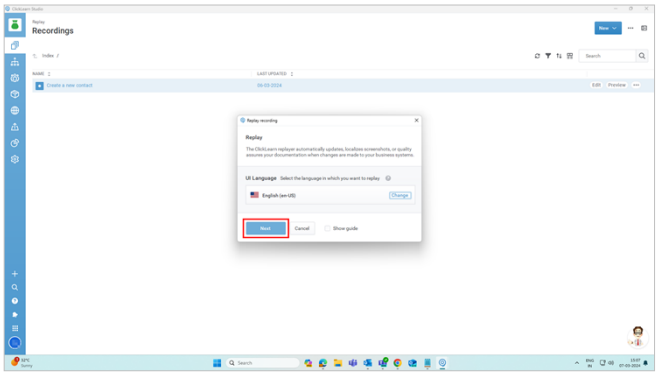
Right-click on the grid view cell **NAME** with data: **Create a new contact**.



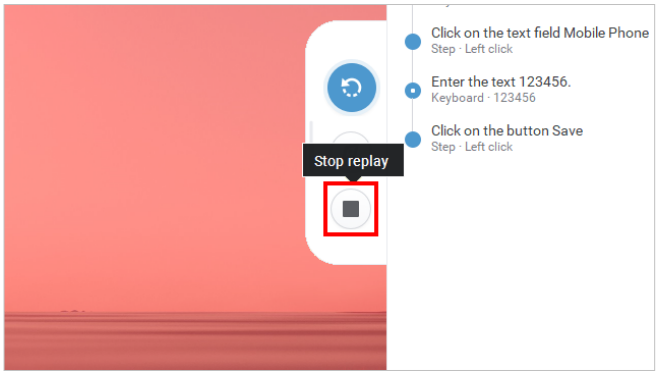
Click on the menu item **Replay**.



Click on the button **Next**.



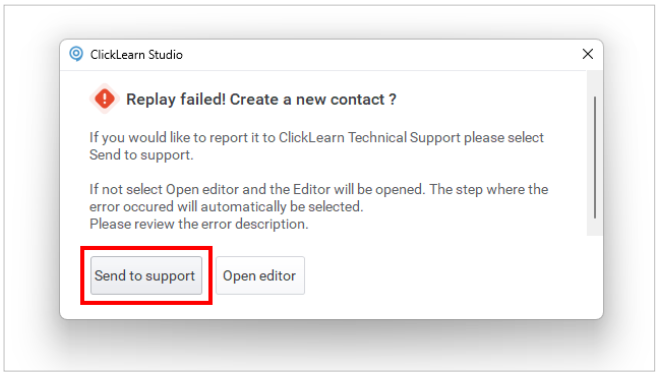
It fails if the replay cannot locate the item on the screen. It will dim the current screen and will display ClickLearn Replay Assistance window.
Click on the button **Stop replay**.



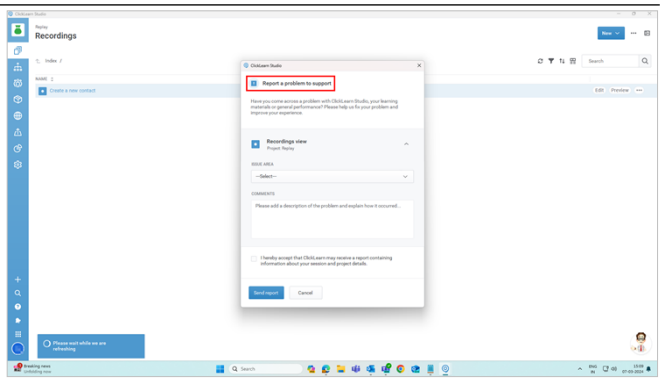
This opens with a new window: Replay failed.

Click on the button **Send to support**.

This will report the problem to the ClickLearn support team.

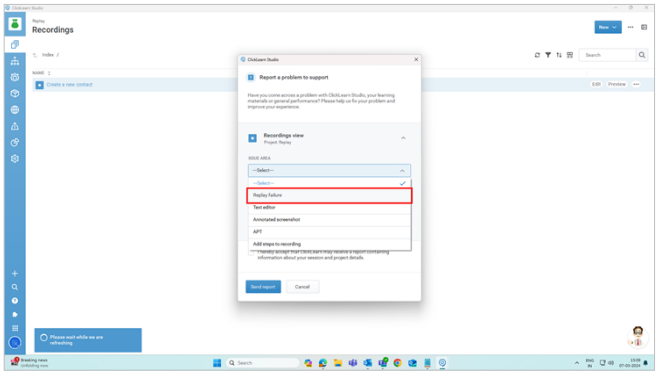


This opens up a new window: **Report a problem to support**.

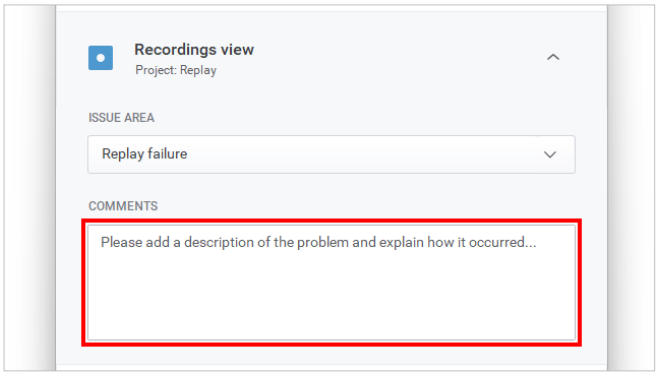


You can select the reason from the Issue Area dropdown.

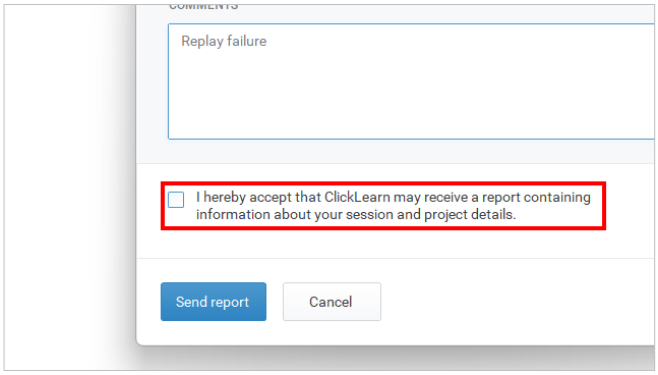
Click on the dropdown item **Replay failure**.



Click on the textbox **Comment** to add a description of the problem and how it occurred.



Click on the checkbox **Accept** and click on the button Send report.
You will receive an email once the support team has analyzed your case.



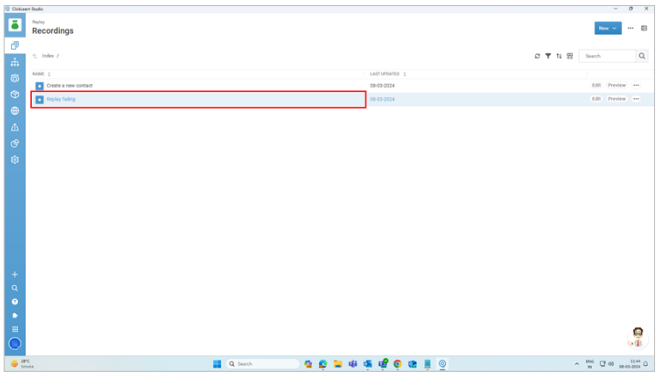
7.4. Troubleshoot: Replay Fails Due to Missing Data

Continue a replay when required data is absent, so that a single missing field doesn't require re-recording the entire process.

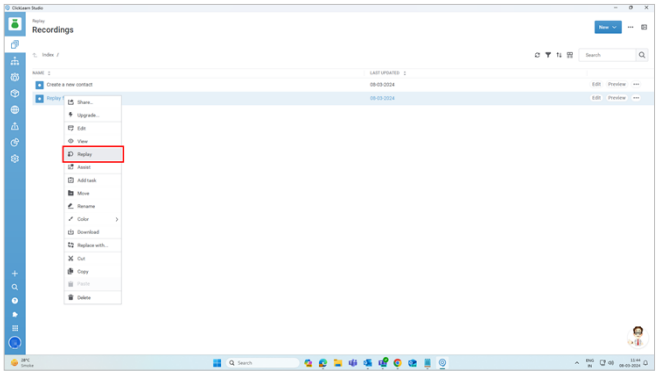
7.4.1. Introduction

The common reason for the replay to fail is when your application data changes.

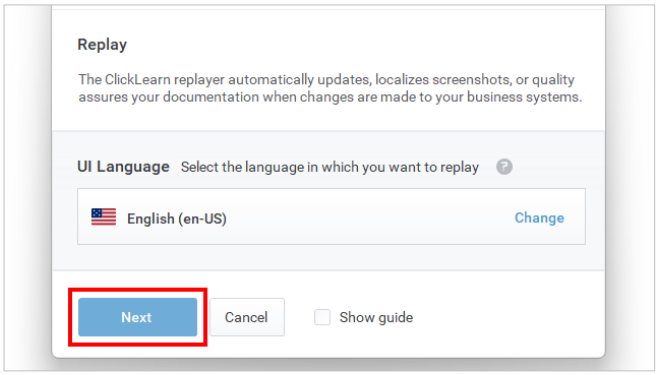
In this example, we are trying to replay the recording where it cannot find the cell. That is, we have a different screen open in the application when replaying.
Right-click on the grid view cell **NAME** with data **Replay failing**.



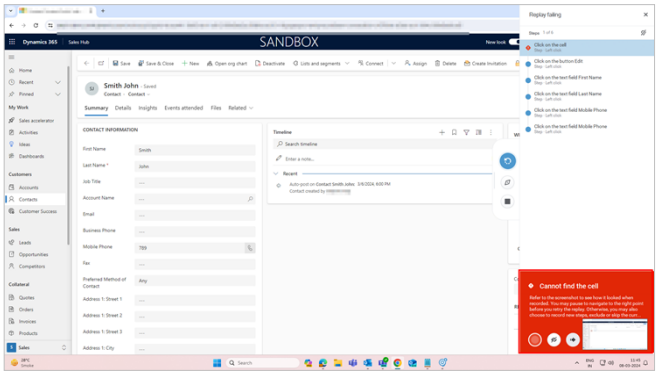
Click on the menu item **Replay**.



Click on the button **Next**.



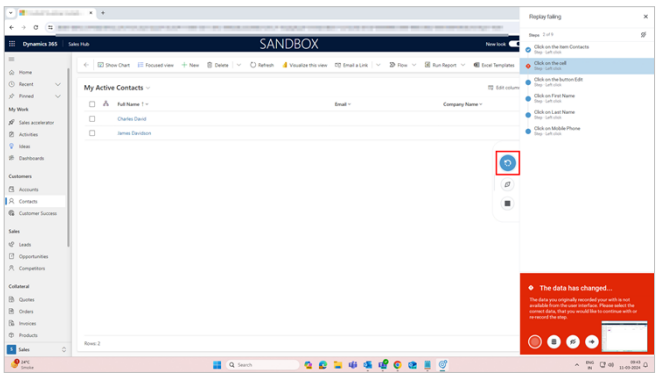
This starts the replay. But the replay failed as it could not find the cell.



7.4.1.1. Retry

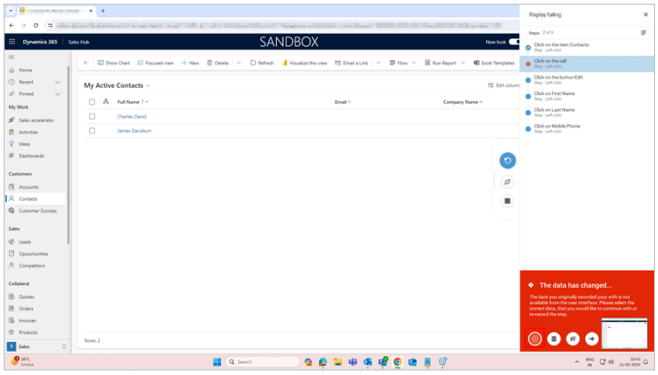
With ClickLearn Replay, you can edit your recordings in real-time as they playback on your live system. The highlighted step failed. So, we will try to replay the same step and click the **Retry** button.

The replay failed because it could not identify the selected item.

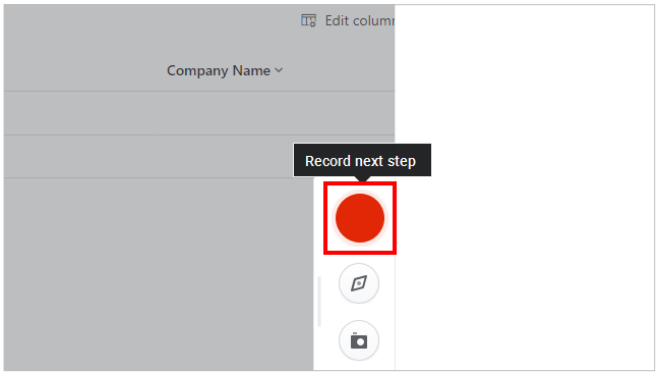


7.4.1.2. Record and Replace

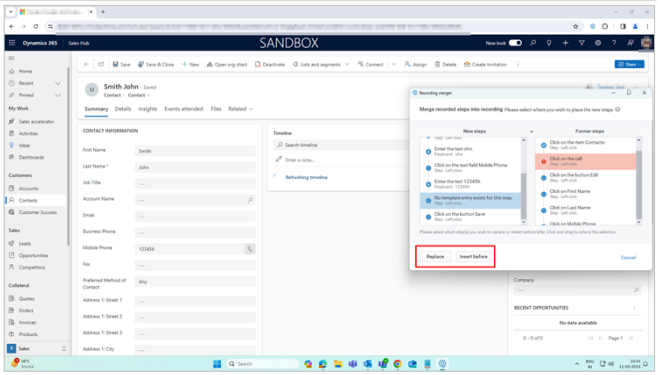
To replace the step, you need to re-record. To record a step, click on the button **Record**.



Click on the button **Record next step**.

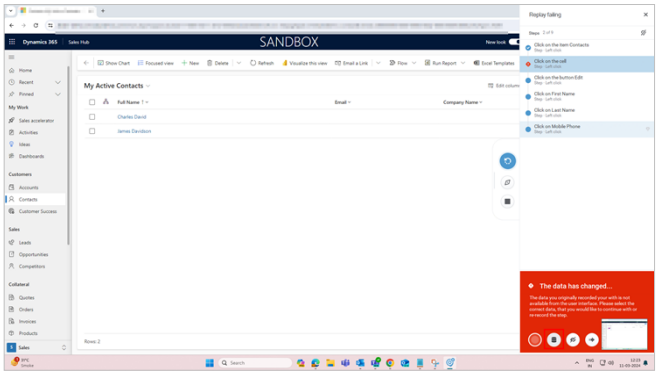


This will record a step that you may optionally use to replace the failed one or insert it before the selected step.



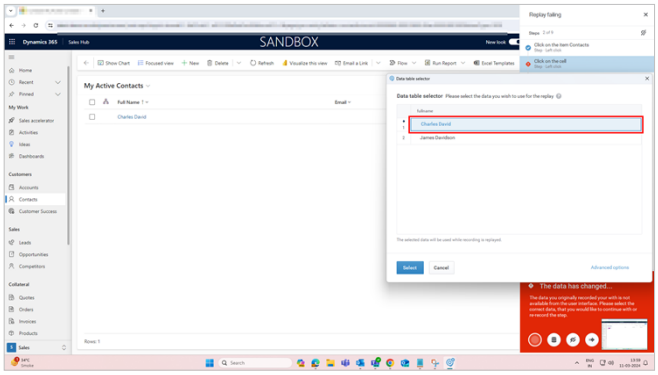
7.4.1.3. Change Data

If you wish to change the data while replaying your recording, you can do that by changing the data. To change the data, click on the button **Change data**.



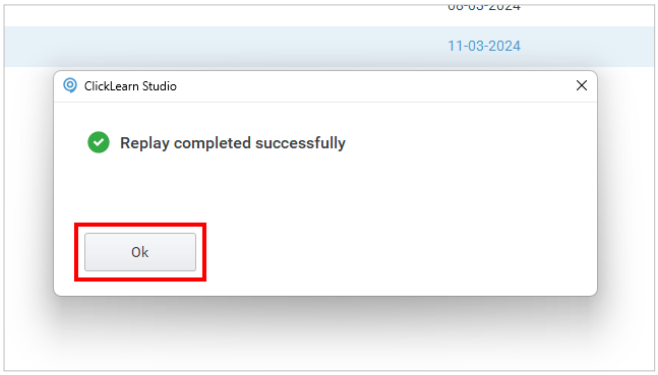
This opens up a new dialog where you can select the data you wish to use for replay.

Click on the grid view cell **fullname** with data, **Charles David**. And click on the button Select. Clicking on **Advanced Options** will let you manually edit data in data editor using which the replay will be continued.



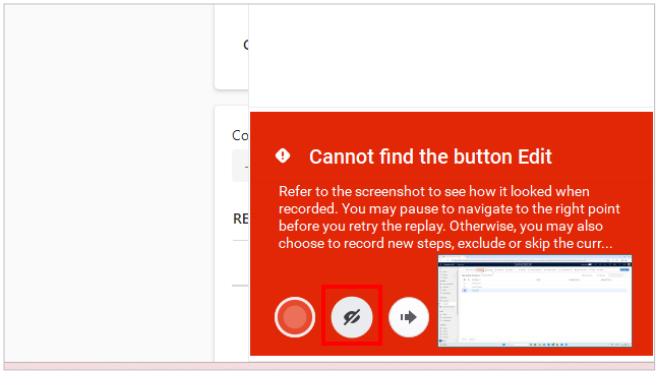
Once the replay is complete, it displays a pop-up indicating it has been completed successfully.

Click on the button **Ok**.

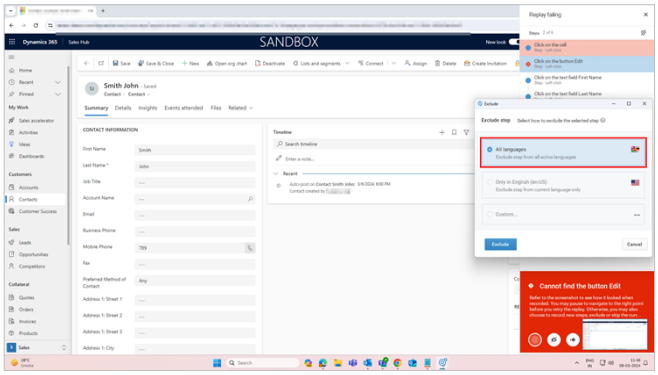


7.4.1.4. Exclude

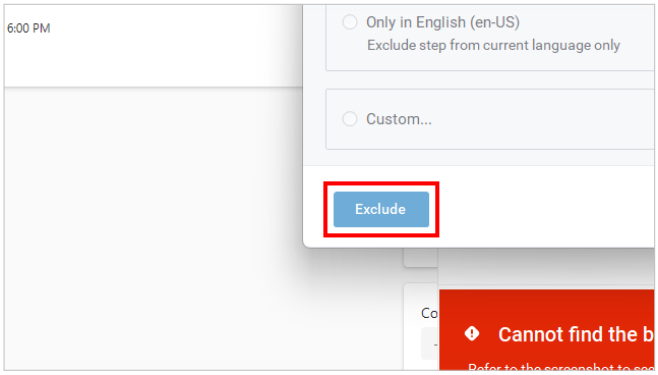
If you are sure you want to avoid this step being replayed, you can consider excluding the step.



When you click the Exclude button, it asks if you want to exclude content from all languages or the selected language. Choose the option that best aligns with your project needs.

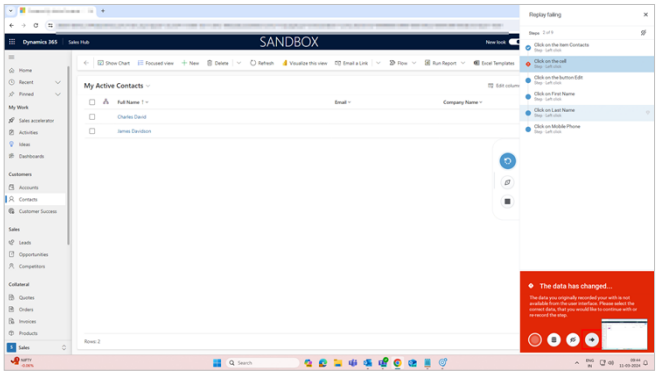


Click on the button **Exclude**.



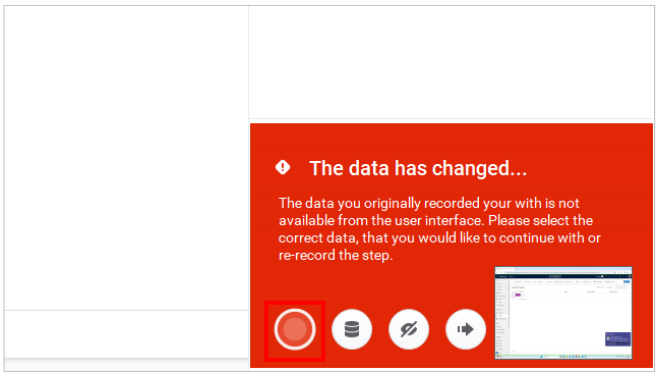
7.4.1.5. Skip

If you are sure you want to avoid this step being replayed, you can consider skipping the step. **Skip** means that the replay will continue with the next step.



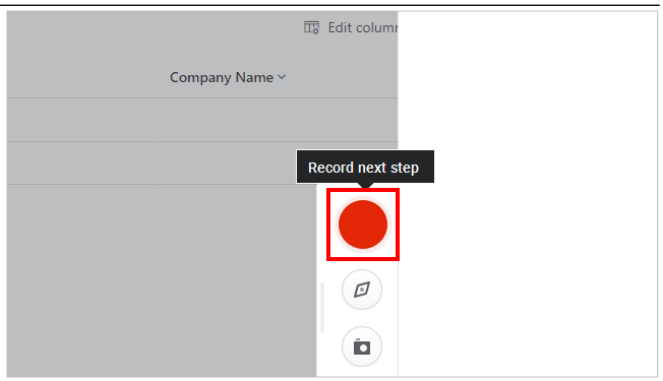
7.4.1.6. Recording due to changes

Assuming that you know why the step is not being replayed, it may be that the data just got deleted. So, to re-record the action, click on the **Record steps** button.



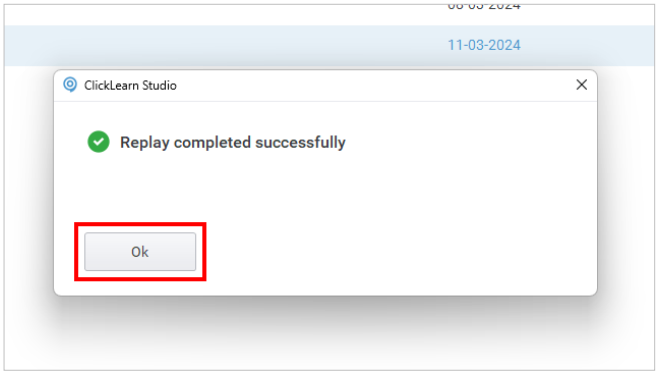
Click on the button **Record next step**.

This starts with a normal recorder, which allows you to record the step. Once you have completed recording the step, click the **Stop** button to stop recording; the replay will proceed automatically.



Once the replay is complete, it displays a pop-up indicating it has been completed successfully.

Click on the button **Ok**.



7.5. Troubleshoot: Replay Fails Due to UI Changes

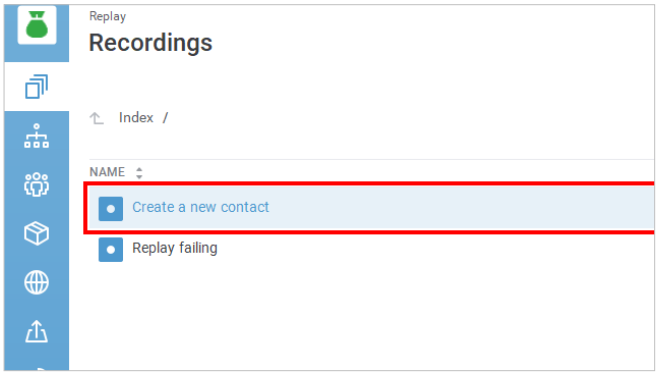
Fix a replay failure caused by interface changes in the business system without re-recording steps that still work correctly.

7.5.1. Introduction

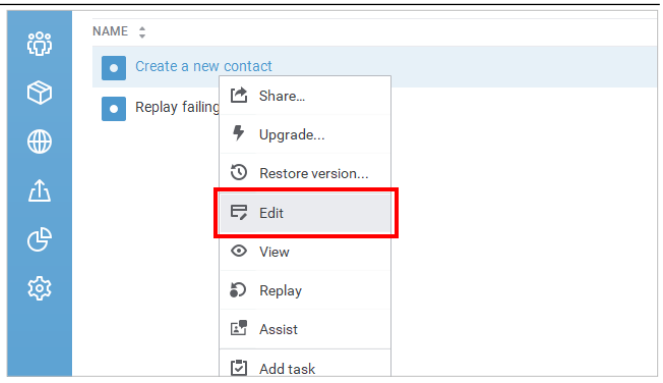
Specific steps may not be necessary for the text editor within the recorded steps. Therefore, the author can exclude these non-essential steps from the text editor. They can also perform the same course of action to exclude the steps from the other editors.

7.5.1.1. Exclude Steps

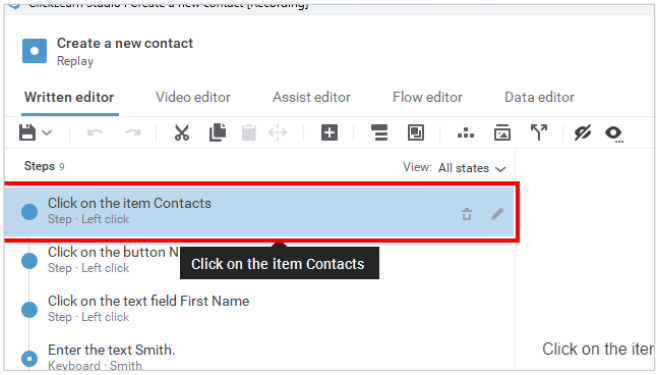
Right-click on the grid view cell **NAME** with data: **Create a new contact**.



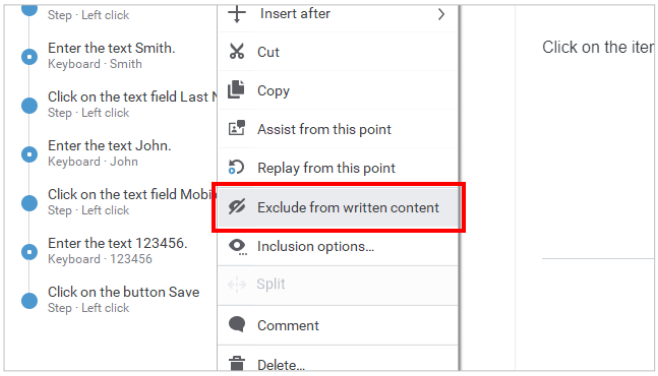
Click on the menu item **Edit**.



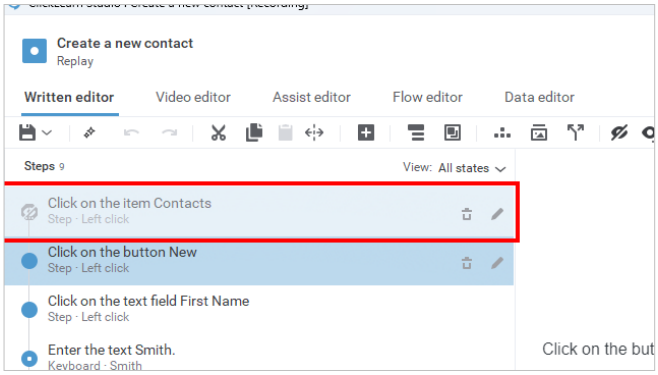
Right-click on the steps: **Click on the item Contacts**.



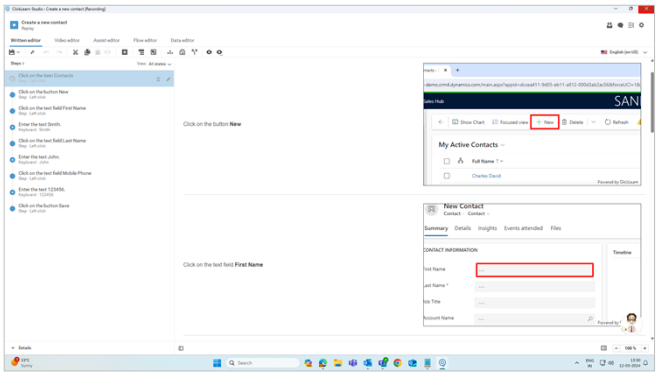
Click on the menu item **Exclude from written content**.



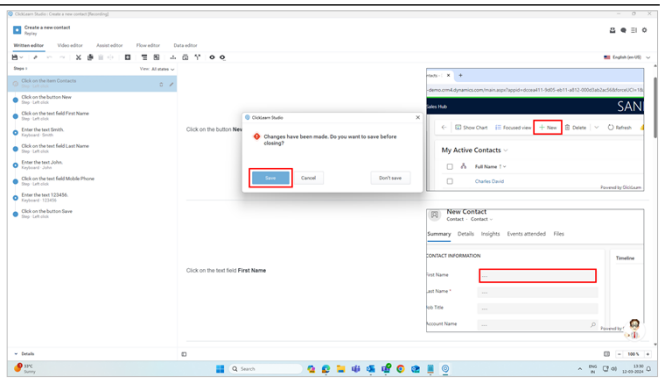
The step: **Click on the item Contacts** is now excluded from the written editor.
NOTE: You can exclude the steps from all the different types of learning materials based on your project needs but it will still be considered while replaying a recording.



Click on the close button of **ClickLearn Studio: Create a new contact [Recording]**.

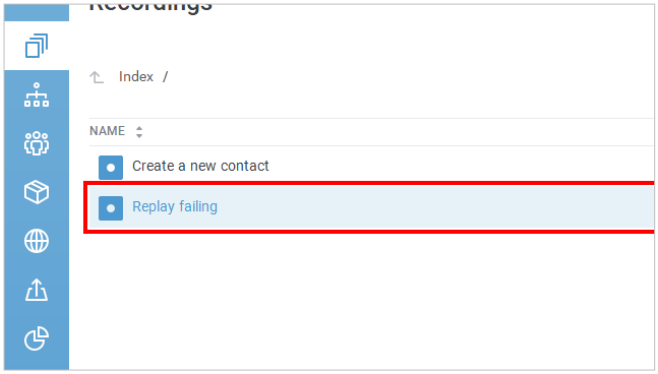


Click on the **Save** button.

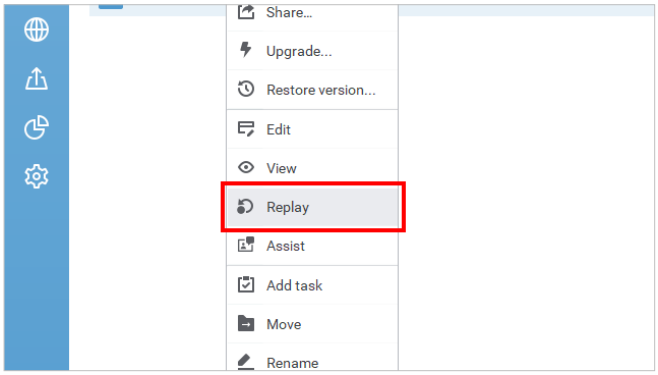


7.5.1.2. Replay Failure

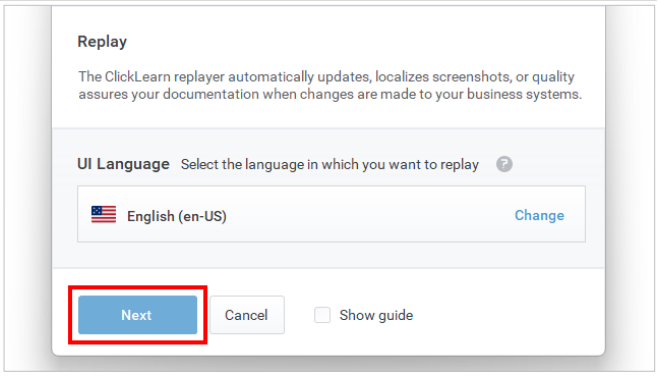
Right-click on the grid view cell **NAME** with data **Replay failing**.



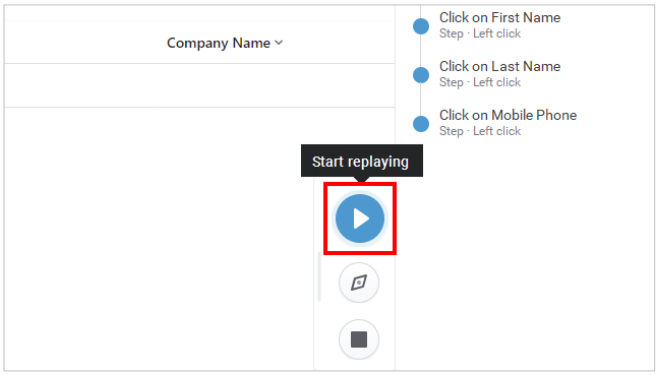
Click on the menu item **Replay**.



Click on the button **Next**.

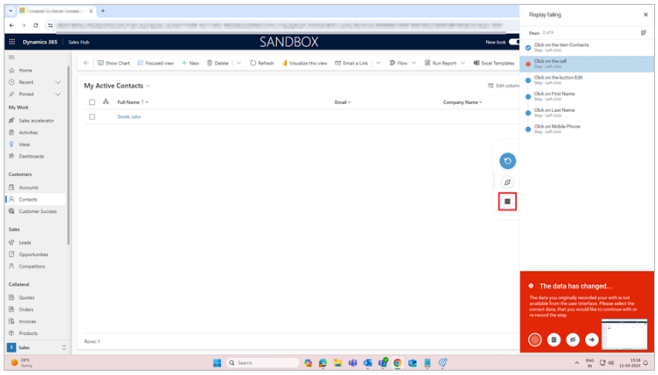


Click on the button: **Start replaying**.

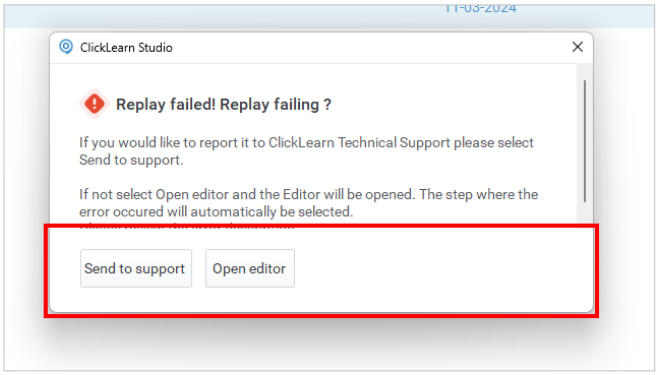


The replay failed because it could not identify the selected item.

Click on the button **Stop replay**.

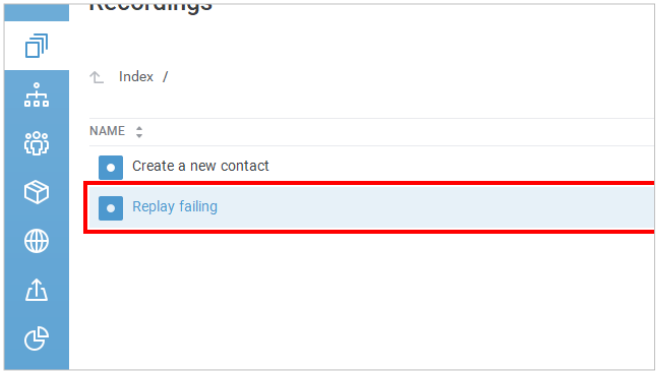


It opens a new window asking you what action you would like to take for the failed replay. You can send it to the ClickLearn Support team. Or open the editor, make the necessary changes, and then replay again.

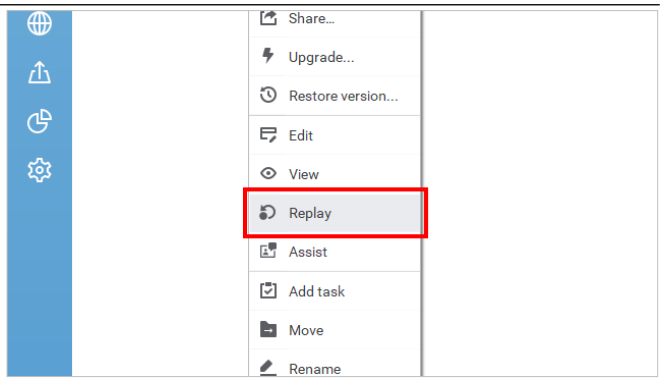


7.5.1.3. Replay Success

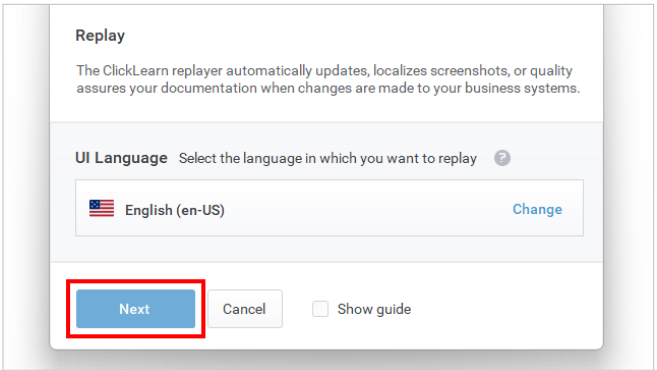
Right-click on the grid view cell **NAME** with data **Replay failing**.



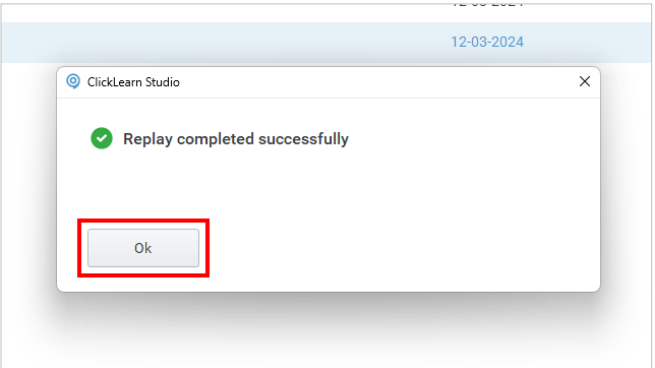
Click on the menu item **Replay**.



Click on the button **Next**.



Click on the button **Ok**.



7.6. Best Practices for Reliable Replay

A recording built for replay pays for itself the first time your interface changes, instead of rebuilding the process from scratch, you fix one element and rerun it.

7.6.1. Introduction

Replay lets you re-run a recorded process automatically instead of walking through it by hand every time your system changes or a new colleague needs training. That value only holds up if the replay actually succeeds - a recording that fails partway through creates more rework than it saves.

7.6.1.1. 1. Structure Your Recording For Replay

The prerequisites for using the Replay function effectively are listed below.

- Ensure your initial recordings are clear and well-structured. This makes the Replay process more accurate.
- Make use of the mouse to navigate between tabs. Avoid using the tab keys.
- You must start the same application you used when you made the recording.
- If you plan to Replay in multiple languages, run the Replay in the original language first to ensure everything works correctly before moving on to other languages.
- Ensure the environment where the Replay will run is consistent with the one where the original recording was made. Any changes in the system or interface can affect the Replay.

While replaying the recording, a Replay pane appears on your screen. To stop the Replay, click the Stop button.

Listed below are the common reasons why a Replay fails.

- If the application interface has changed since the original recording, Replay may be unable to find the correct elements associated with it.
- Another reason a Replay fails is that the environment differs from the original recording.
- The Replay fails due to incorrect changes in the recording.
- Replay fails when the data is not present.

Right-click on the recording you want to Replay and select Replay. A dialog box displaying the UI language will appear. Click the Change button to choose the language to replay the recording.

Listed below are the best practices for recording when replaying in ClickLearn Attain.

7.6.2. Prepare your environment for replay.

Ensure that the application you are recording is open and in the same state as the one you previously recorded. This will ensure that you complete the replay successfully.

7.6.3. Plan your recording

If you are using a multilingual project, plan to replay your recording in the original language first, which will help you identify errors. Now, you can replay your recordings in multiple languages. In addition, you can address language-specific issues, which helps maintain the consistency of the replay process.

7.6.4. Validate your data

Validating your data for the replay to work successfully is a core replay factor.

For the replay to work successfully, ensure you have valid data in the system when creating the recording.

7.6.5. The structure of your recordings

This includes structuring your recordings so that each process seamlessly transitions to the next.

7.7. Tips and tricks for Replay

Get reliable, accurate Replays in ClickLearn Attain by following proven tips on prerequisites, avoiding common failures, and replaying recordings in multiple languages with confidence.

7.7.1. Introduction

Listed below are the tips and tricks for Replay while using ClickLearn Attain.

7.7.1.1. What are the prerequisites for using the replay function?

The prerequisites for using the Replay function effectively are listed below.

- Ensure your initial recordings are clear and well-structured. This makes the Replay process more accurate.
- Make use of the mouse to navigate between tabs. Avoid using the tab keys.
- You must start the same application you used when you made the recording.
- If you plan to Replay in multiple languages, run the Replay in the original language first to ensure everything works correctly before moving on to other languages.
- Ensure the environment where the Replay will run is consistent with the one where the original recording was made. Any changes in the system or interface can affect the Replay.

7.7.1.2. How to stop the Replay?

While replaying the recording, a Replay pane appears on your screen. To stop the Replay, click the Stop button.

7.7.1.3. What are the common reasons a Replay fails?

Listed below are the common reasons why a Replay fails.

- If the application interface has changed since the original recording, Replay may be unable to find the correct elements associated with it.
- Another reason a Replay fails is that the environment differs from the original recording.

- The Replay fails due to incorrect changes in the recording.
- Replay fails when the data is not present.

7.7.1.4. How do you Replay a recording in a different language?

Right-click on the recording you want to Replay and select Replay. A dialog box displaying the UI language will appear. Click the Change button to choose the language to replay the recording.

8. Team

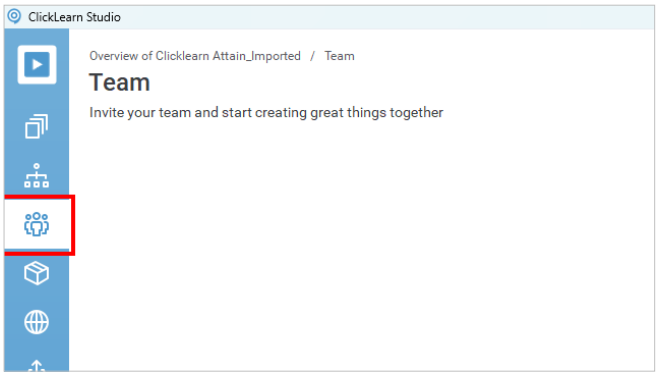
8.1. Understand Roles and Permissions

Manage your project team in one place, inviting members, assigning roles, and monitoring activity without leaving the project.

8.1.1. Introduction

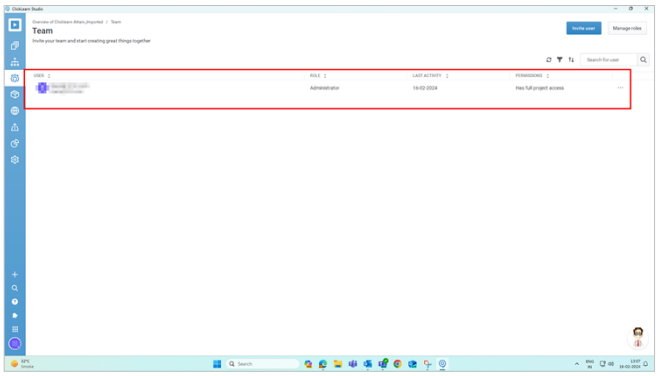
This section in ClickLearn Studio shows you the details of your project team, such as the user name, role, status, and tasks of each team member.

You can also invite and assign tasks to new team members. To access the Team, open your project and click on **Team**.



8.1.2. Basic Elements

The basic elements are listed as follows.



User: It displays the list of user names associated with that project.

Role: The role you have assigned to a user, whether an administration or an author role.

Last Activity: This feature shows the date of the last activity.

Permissions: It will display the permission assigned to the user.

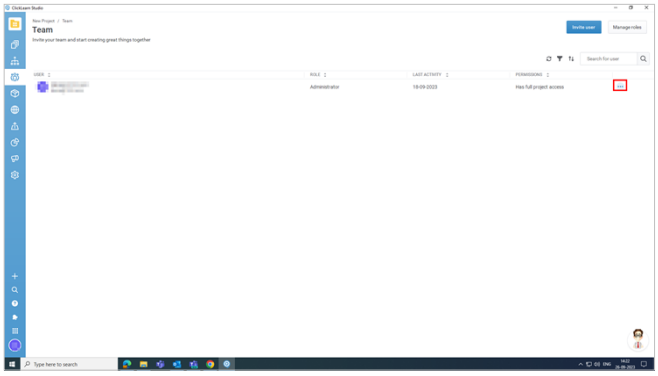
- **Administrator:** Has full project access.
- **Author:** Can create and edit recordings in the entire project, but cannot delete the project.

8.2. Add and Manage Team Members

Manage every team member from one menu, to view details, share contacts, reassign roles, or revoke access without leaving your project.

8.2.1. Access to more menu

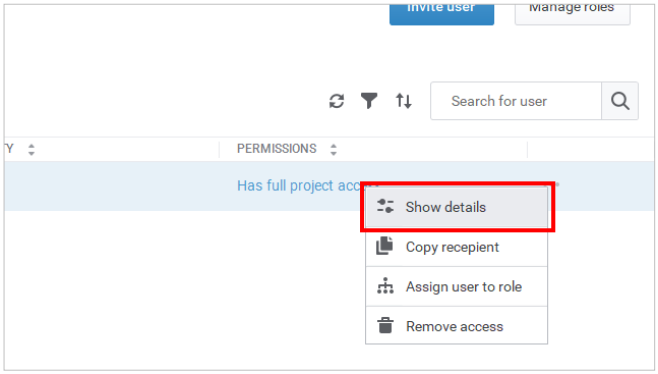
To access more menu options, click **More Options** of grid cell **Action**.



8.2.2. Options in more menu

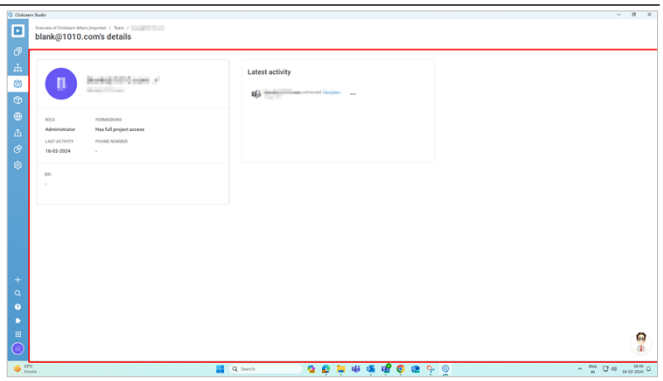
8.2.2.1. Show Details

Click on the menu item **Show details**.



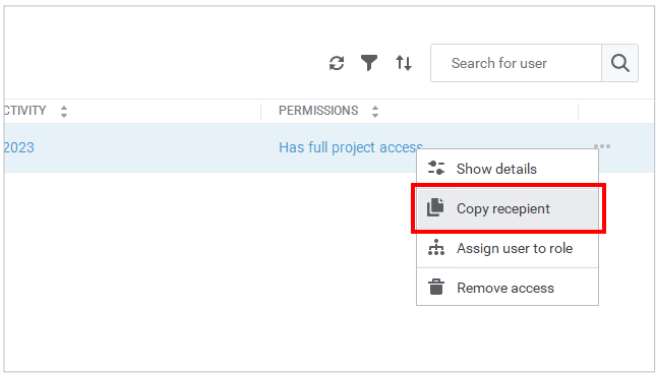
Show Details: This will display the user details and the latest activity.

- **User Details:** User details will show the user's role, permissions, last activity, phone number, bio, etc.
- **Latest Activity:** It also displays another label for the latest activity. The latest activity shows the user's latest activity.

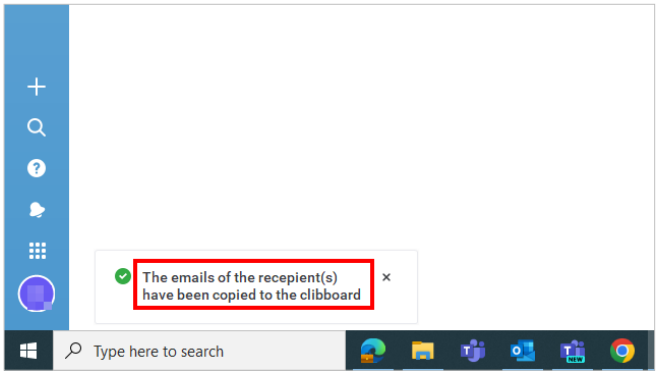


8.2.2.2. Copy recipient

Copy Recipient: This will save the recipient's email address to your clipboard.

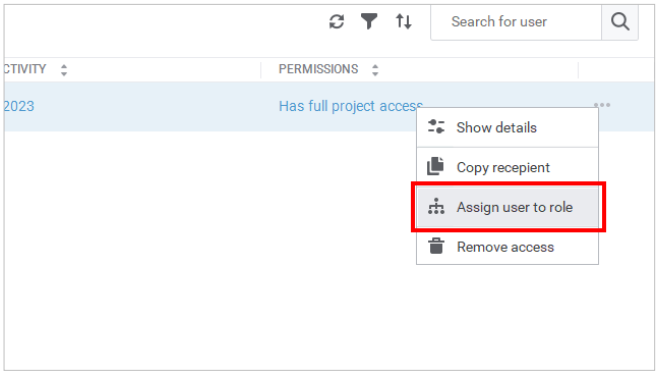


Once you have clicked on the copy recipient, a small message at the bottom left corner appears: "**The emails of the recipient(s) have been copied to the clipboard**." that is, the email is copied.



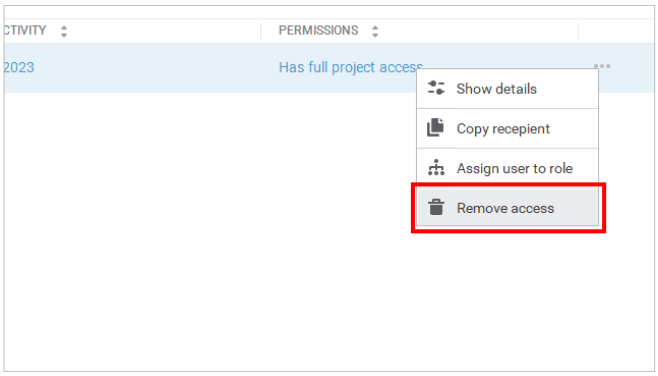
8.2.2.3. Assign user to role

Assign user to role: When you click on this option, a new window pops up where you can assign the role to the selected user as an administrator or author.



8.2.2.4. Remove Access

Remove Access: This option enables the administrator to remove a user's access from a particular project.



8.3. Other elements of the team

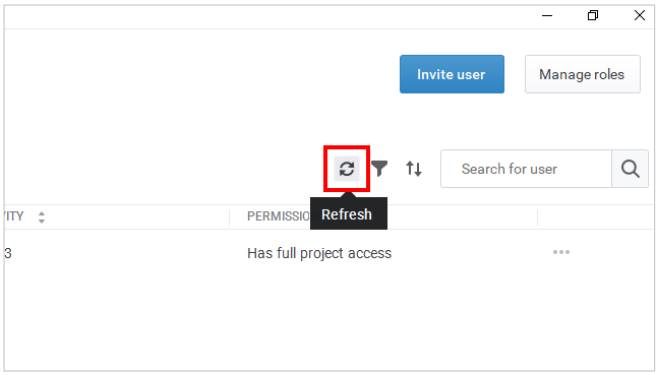
Quick access to the team management tools, to refresh, filter, sort, and search your way to the right member without extra scrolling.

8.3.1. Other Elements

8.3.1.1. Refresh

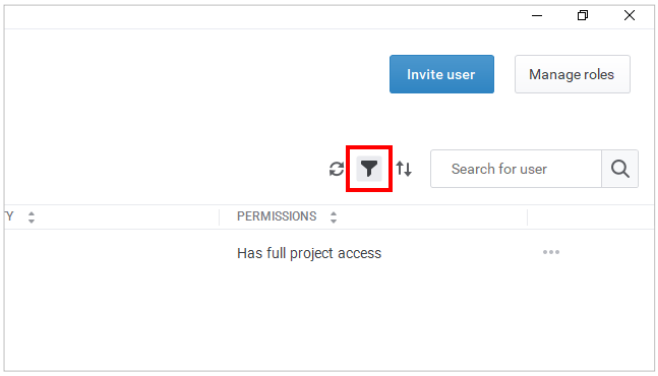
The other elements associated with the team are:

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



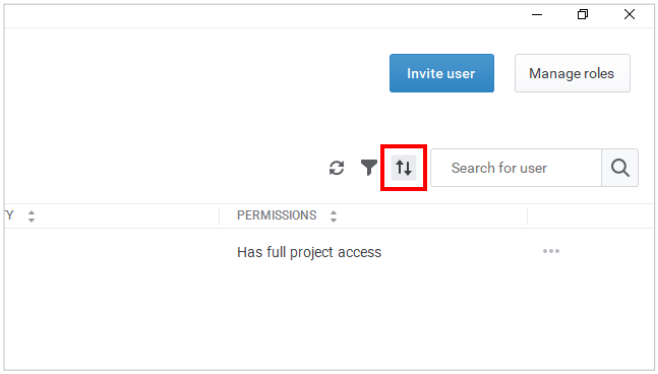
8.3.1.2. Filter

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.



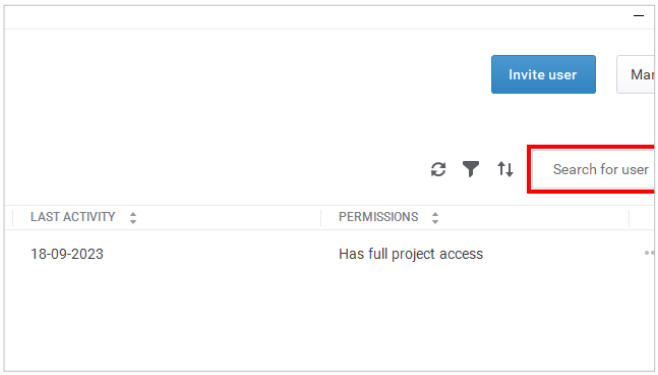
8.3.1.3. Sort

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.



8.3.1.4. Search

Search: This feature lets you search for a user from the available lists of users.



9. Assets

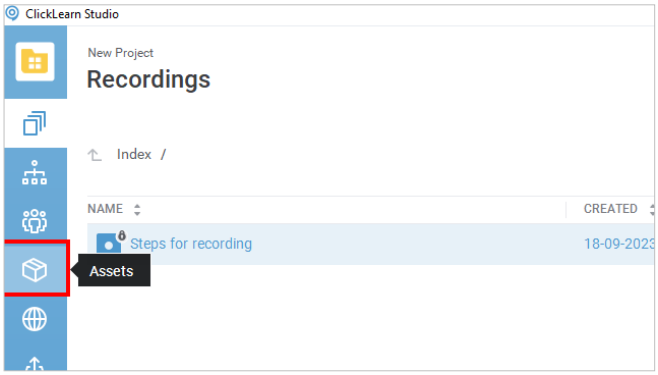
9.1. What Are Assets and How Are They Used

Everything about your project's assets at a glance, to view names, owners, versions, formats, and dimensions without opening a single file.

9.1.1. Introduction

Assets are the external files you can use in your recordings, such as images, documents, videos, etc.

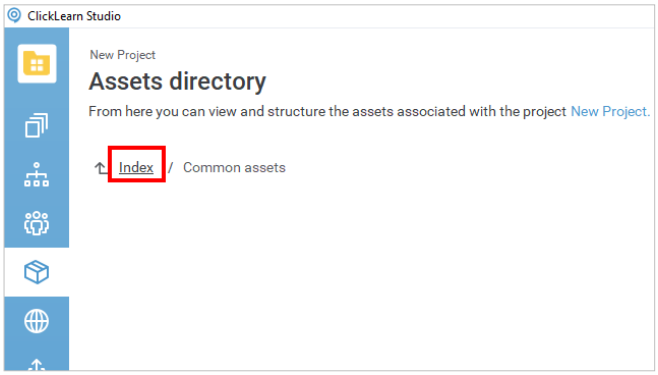
You can upload and organize assets in folders in the Assets directory of each project. They can help enrich your learning materials and make them more engaging and interactive.



9.1.2. Overview of assets directory

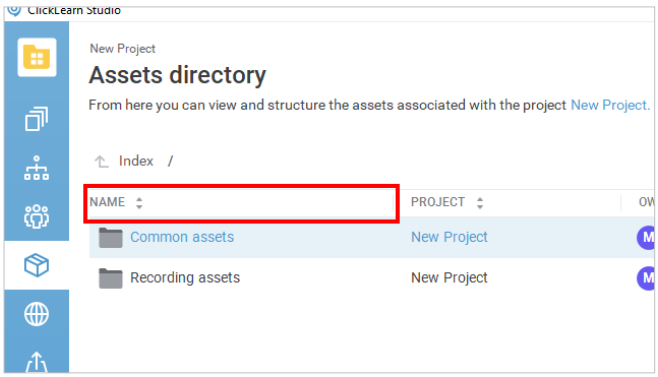
9.1.2.1. Index

Index: This option allows you to return to the previous tab when browsing a folder. You can view the list of folders for the current project under the index.



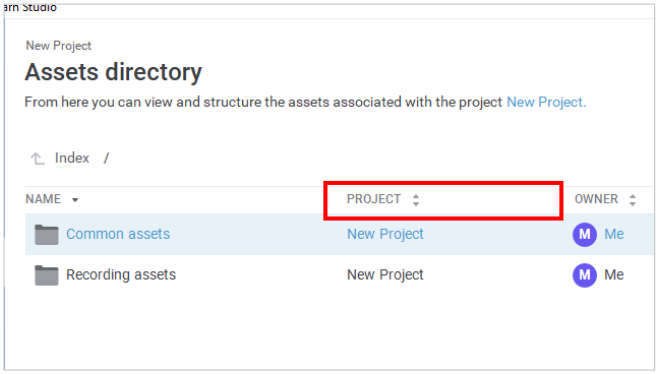
9.1.2.2. Name

Name: This displays the name of the folder.



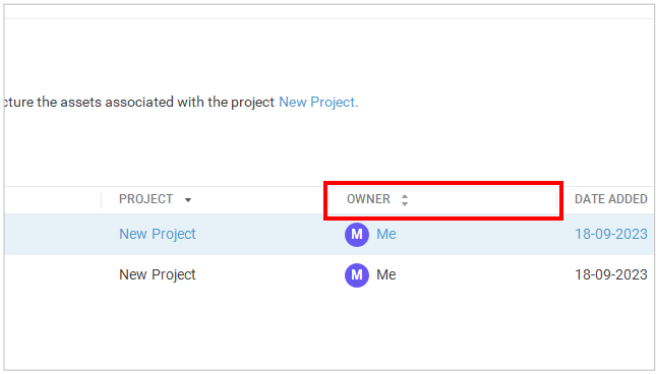
9.1.2.3. Project

Project: The name of the project you are working on.



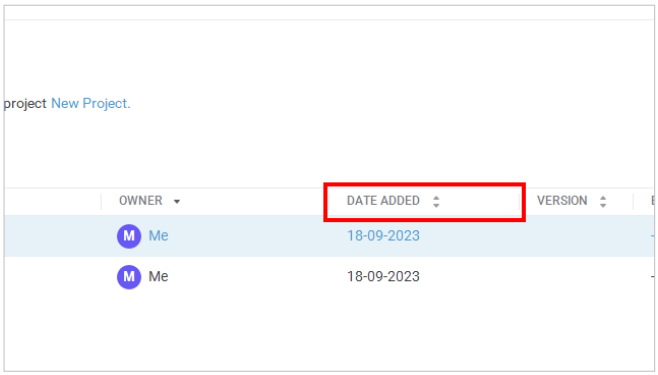
9.1.2.4. Owner

Owner: The user who created the project.



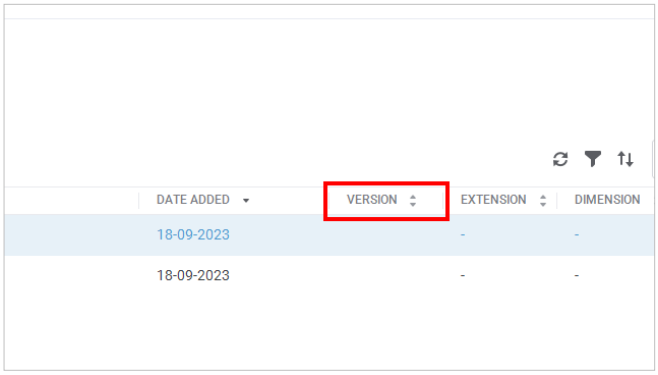
9.1.2.5. Date Added

Date Added: This displays the asset's date when the user adds the asset to the directory.



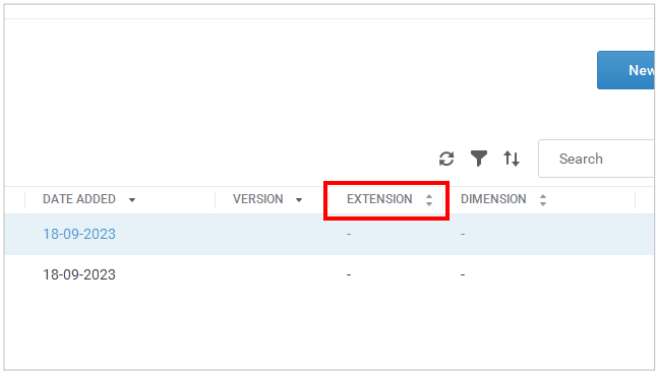
9.1.2.6. Version

Version: This displays the version of the folder.



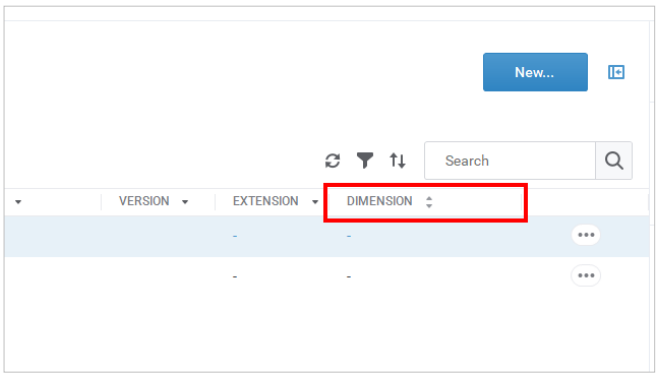
9.1.2.7. Extension

Extension: Extension shows what kind of assets they are, that is, jpg, png, etc.



9.1.2.8. Dimension

Dimension: This shows the asset's dimensions if the asset is an image or a video.



9.2. Upload and Organise Assets

9.2.1. Top right corner elements

Bring files, folders, and assets into your project easily, reuse content across projects with linked references, and keep everything organized in dedicated folders.

9.2.1.1. Other elements at the top right corner

9.2.1.1.1. New Button

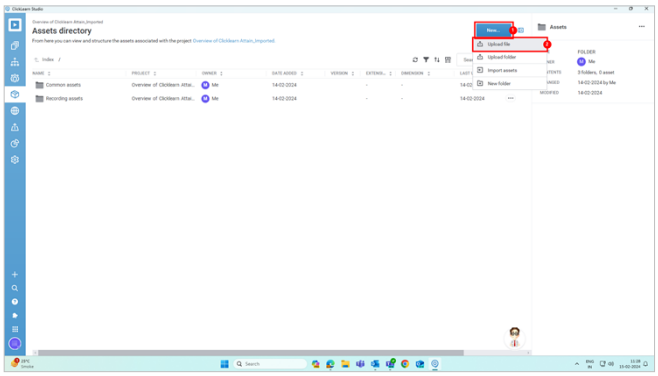
The New button has the following four options associated with it.

- Upload file
- Upload folder
- Import assets
- New folder

The following section explains each option in detail.

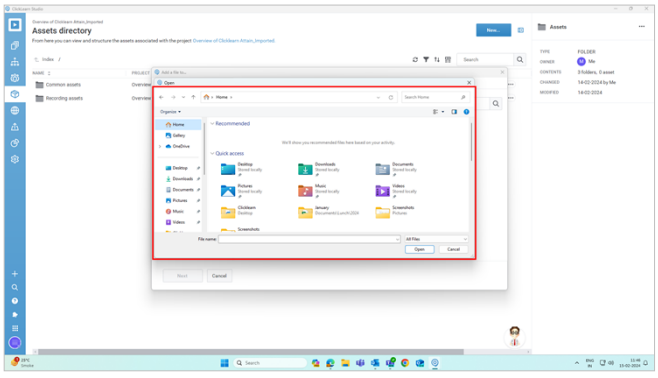
New

1. Click on the button **New**.
2. Click on the menu item **Upload file**.



9.2.1.1.1.1. Upload file

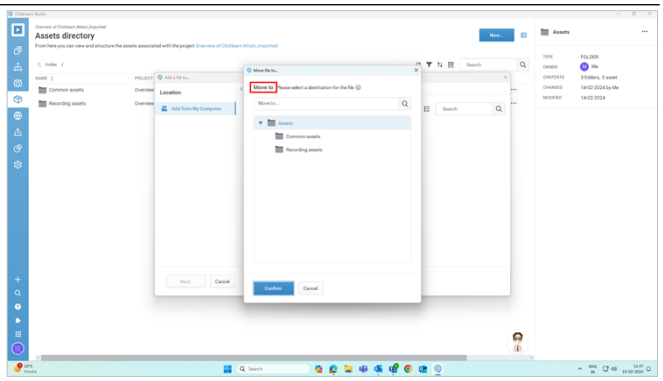
This option helps you to upload a file from the local system. When you click on the upload file option, a new screen, "**Add a file to**," pops up wherein you must select the file you wish to upload.



Once you select the file, it asks you for its location; that is where you want it to be. It pops up with a new window: **Move to**.

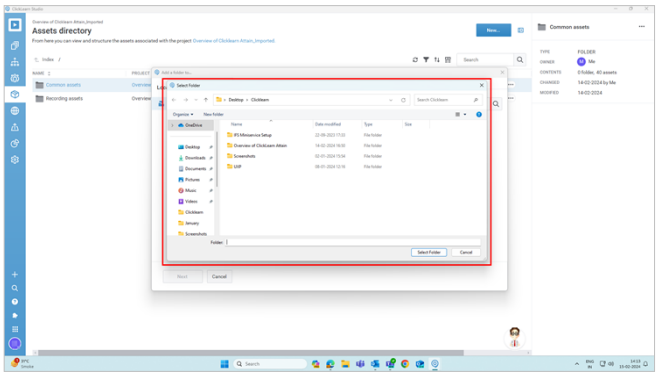
Generally, there are two options wherein you can save the file: the **common assets** and the **recording assets**.

Select the location and click the confirm button, depending on your project requirements. You can see the file at the selected location.

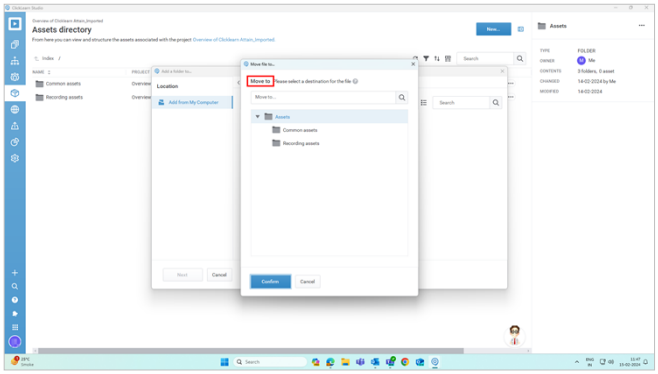


9.2.1.1.1.2. Upload folder

This option lets you upload a folder from the local system. When you click on the upload folder option, it opens up with a new screen that allows you to **Select the Folder** you wish to upload.



Once you select the folder, it asks you for its location; that is where you want it to be. It opens up with a new dialog box, **Move to**. Select the location and click on the confirm button. You can see the folder at the selected location.

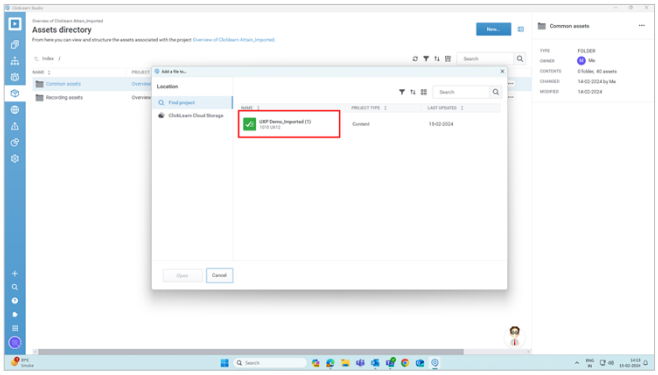


9.2.1.1.1.3. Import assets

This option allows you to import assets from other projects and those on the ClickLearn Cloud Storage.

Select the file you need to add from the projects in a new window that pops up.

Click on the cell **NAME** with the value **UXP Demo_Imported (1)**.

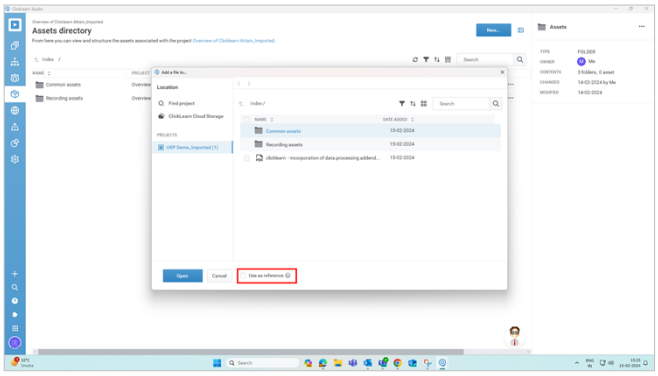


It asks you for its location; that is where you want it to be. Select the location and click on the open button. You can see the assets at the selected location.

You also have an option to use that file as a reference.

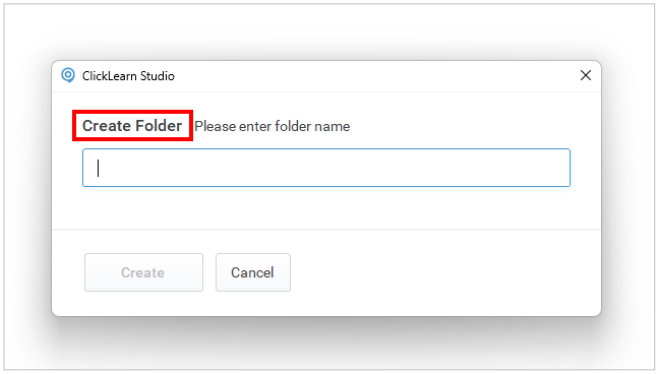
Use as reference: Maintain a link to the source file. Any updates to the source file will also affect this project.

Select the file and click on Open. This will import your assets.



9.2.1.1.1.4. New folder

Create Folder: This creates a new folder. Specify the folder name and click on Create.



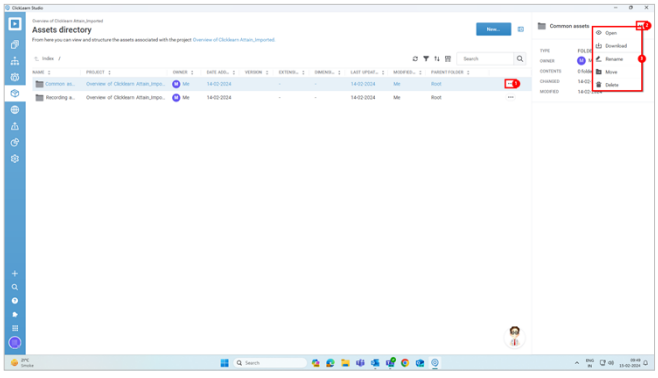
9.2.2. More options in assets

Full control over your asset folders, to open, download, rename, move, or delete without leaving the directory.

9.2.2.1. Options in the more function

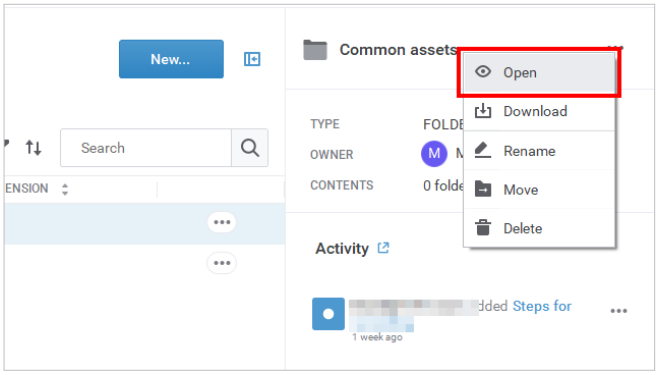
More Menu Options

1. Click the **More** button of the grid cell **Action** to access more menu options.
2. You can also click on the button **More**.
3. This displays more menu options.



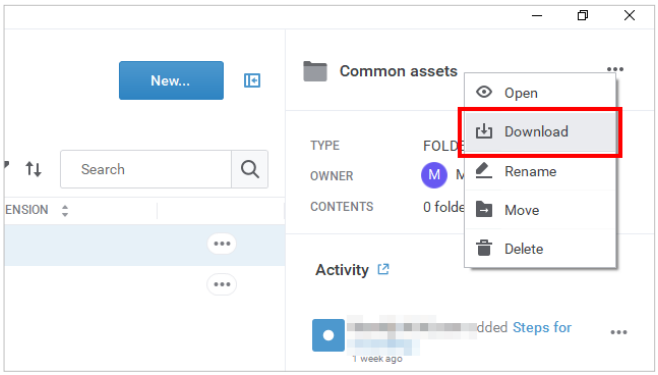
9.2.2.1.1. Open

Open: This option helps you access the asset folder's content.



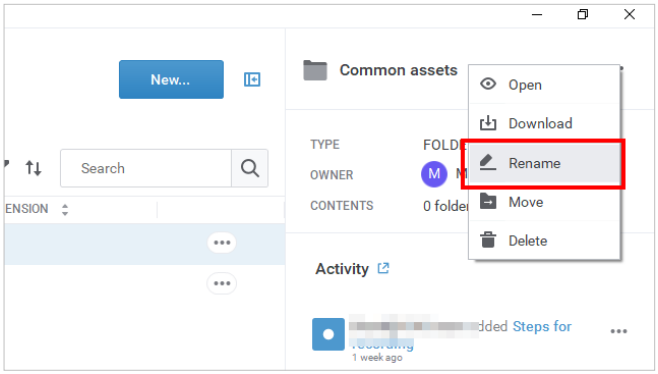
9.2.2.1.2. Download

Download: This option allows you to download and save the folder on your device.



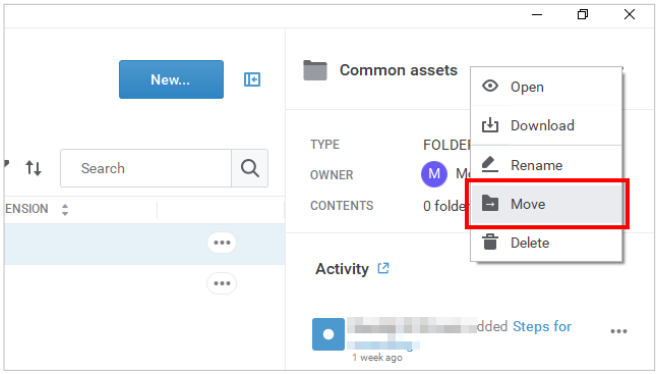
9.2.2.1.3. Rename

Rename: You can change the folder name by using this option.



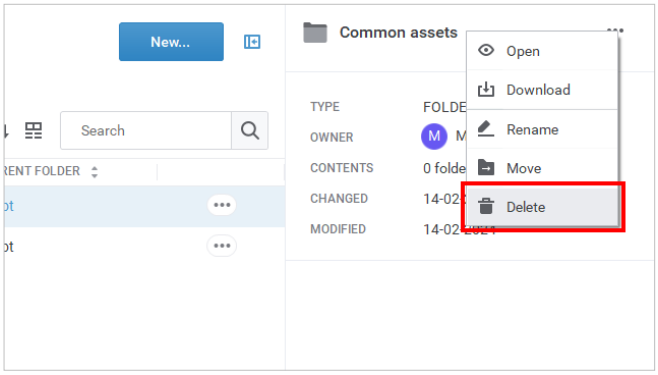
9.2.2.1.4. Move

Move: This option lets you relocate the folder to another location. You can choose from the existing folders, if any.



9.2.2.1.5. Delete

Delete: This option deletes the folder and all its content permanently.



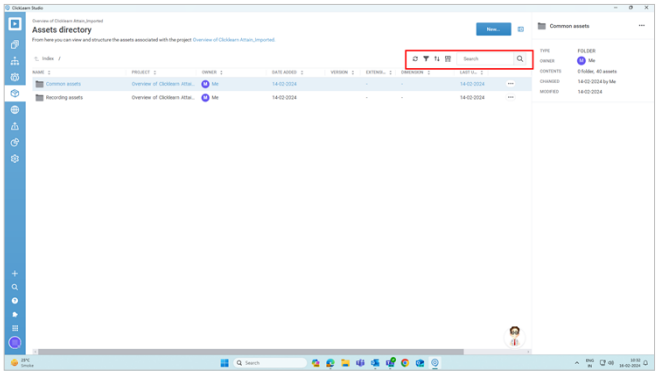
9.2.3. Other elements in asset

Quick access to the asset directory controls, to refresh, filter, sort, choose columns, and search your assets without extra scrolling.

9.2.3.1. Other Elements

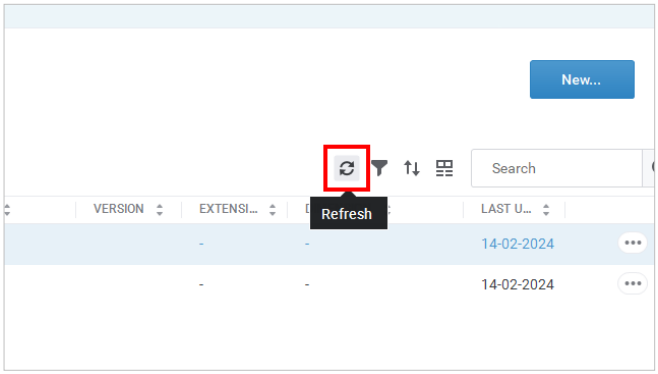
The other elements in the asset are:

- Refresh
- Filter
- Sort
- Column chooser
- Search



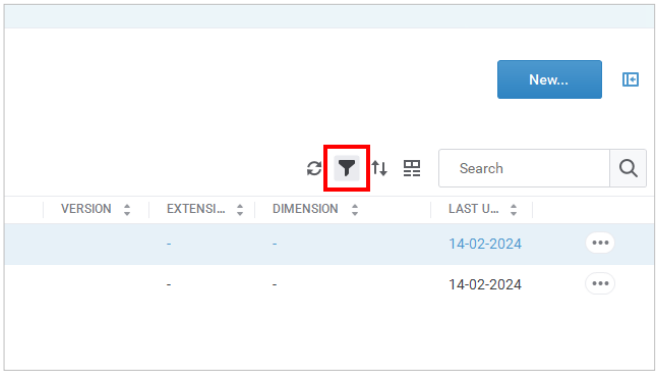
9.2.3.1.1. Refresh

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



9.2.3.1.2. Filter

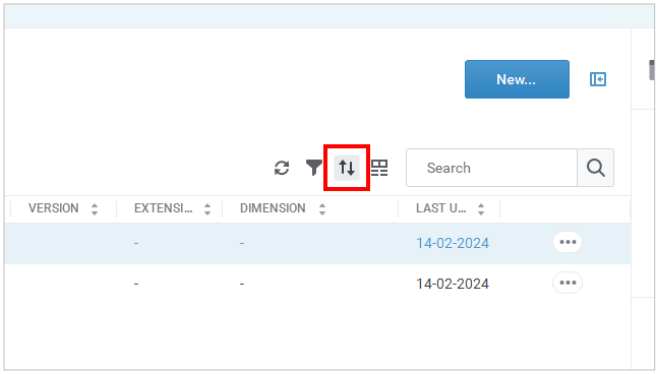
Filter: By selecting the column and type from the list, you can use this feature to navigate complex lists easily. You can also specify your search criteria to suit your needs.



9.2.3.1.3. Sort

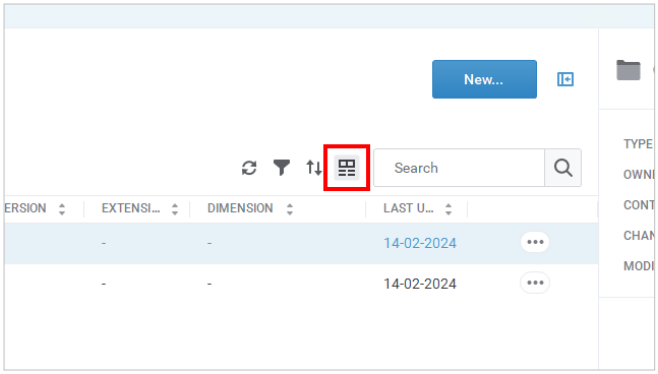
Sort: This feature can arrange the recordings to best suit your project needs.

You can also choose your criteria to sort the recordings according to your preferences.



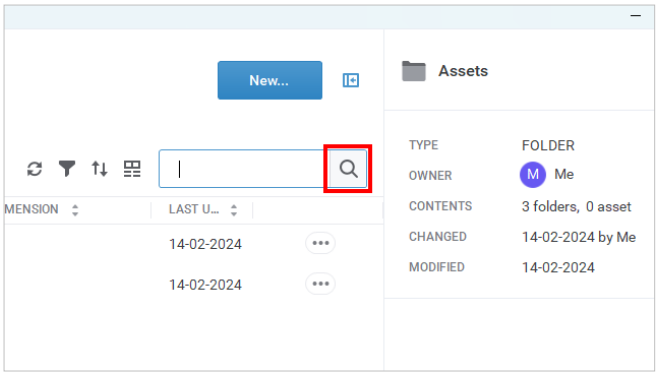
9.2.3.1.4. Column chooser

Column chooser: This feature allows you to select the columns you want to display in the Assets directory.



9.2.3.1.5. Search

Search: This feature lets you search the folders and files in the assets directory.

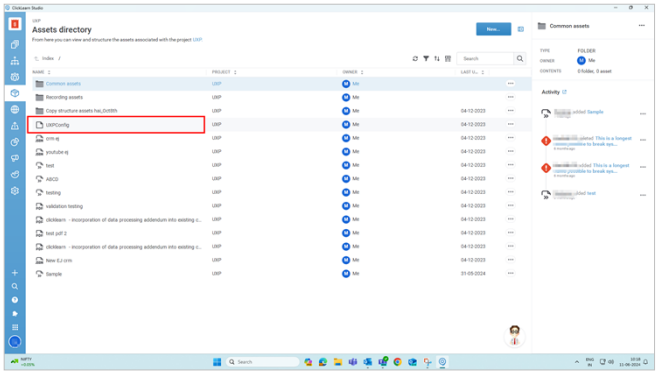


9.2.4. More in Assets

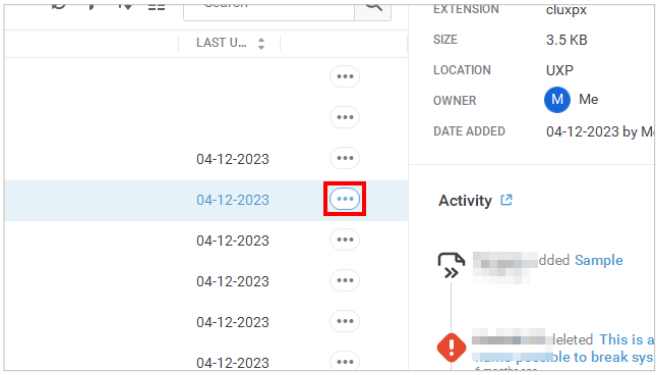
Quick access to asset actions, to download a copy or permanently delete a file without leaving the directory.

9.2.4.1. Options in the more function

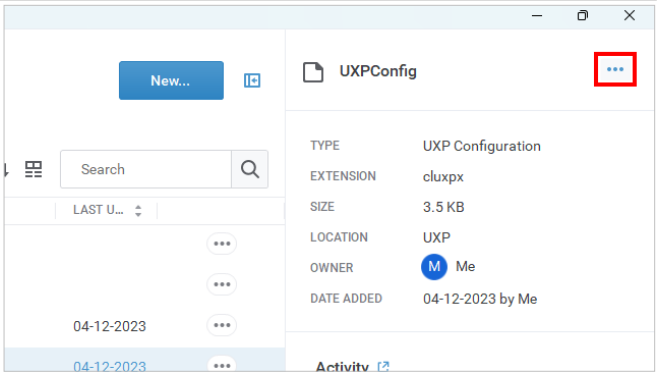
Click on the grid view cell **NAME** with data **UXPConfig**.



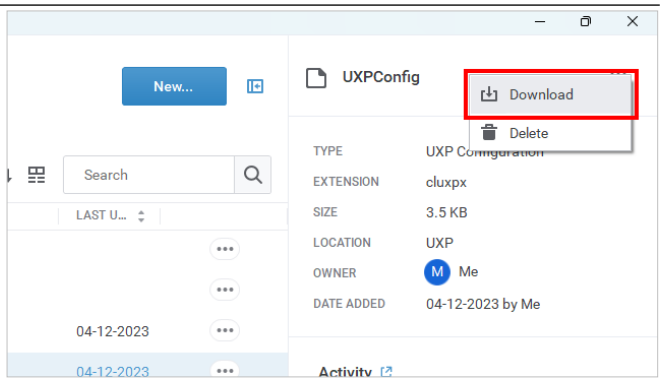
Click the **More** button of the grid cell **Action** to access more menu options.



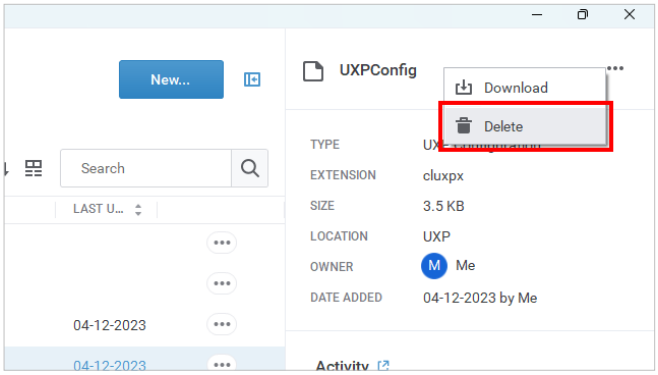
You can also click on the button **More**. This displays more menu options.



Download: This option lets you download and save the asset on your device.



Delete: This option deletes the asset permanently.



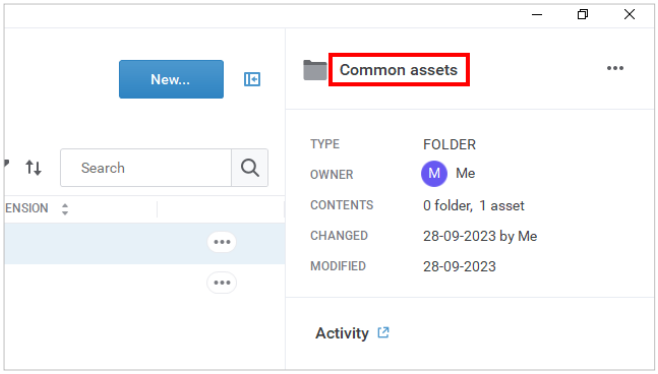
9.2.5. Info panel of assets

See every asset's essential details at a glance, including type, size, owner, location, contents, and change history, with a quick preview for faster asset management.

9.2.5.1. Info panel

9.2.5.1.1. Folder Name

Folder Name: The name of the folder you have selected is displayed here. In our case, it is **Common assets**.



9.2.5.1.2. General Details

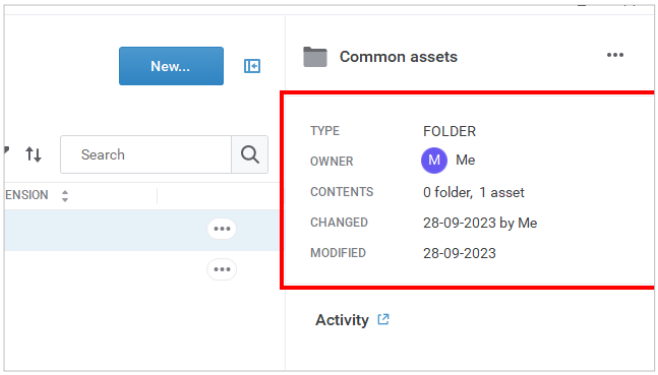
Type: Type represents whether the selected object is a folder or a file.

Owner: This shows the user name of the person who created the project.

Contents: Contents will display the number of folders and the number of assets associated with that particular folder.

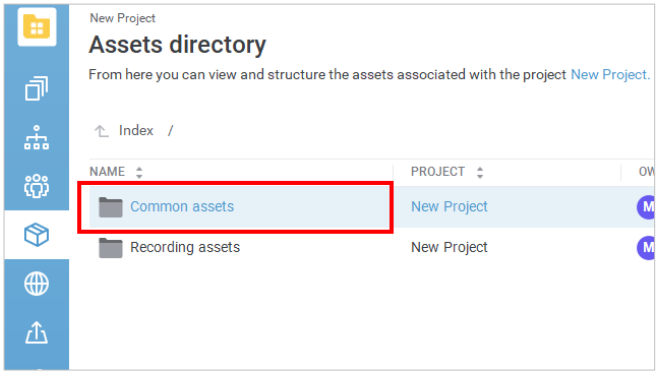
Changed: It displays the date and the user name who made the changes.

Modified: This reflects the date when the recording is modified.

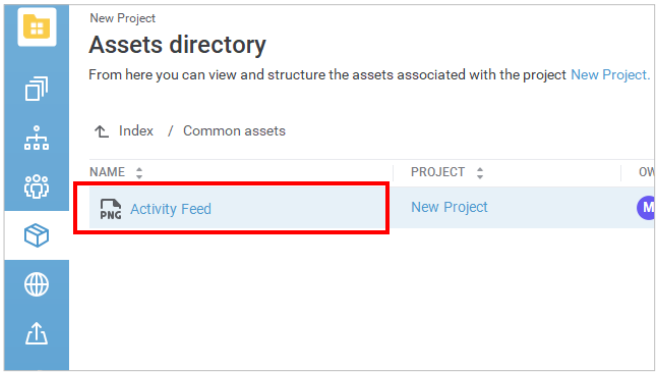


9.2.5.2. General info: When you click on a folder or an asset.

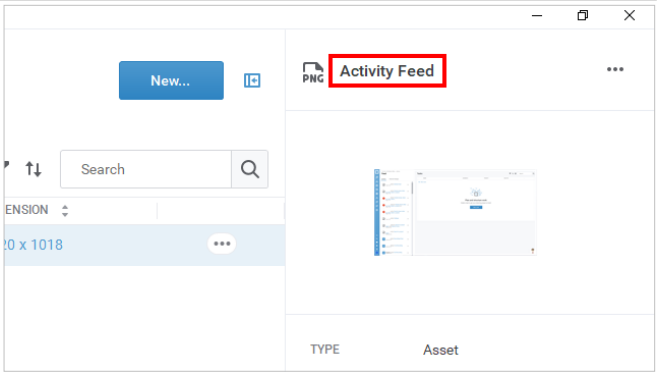
Double-click on the grid view cell **NAME** with data **Common assets**.



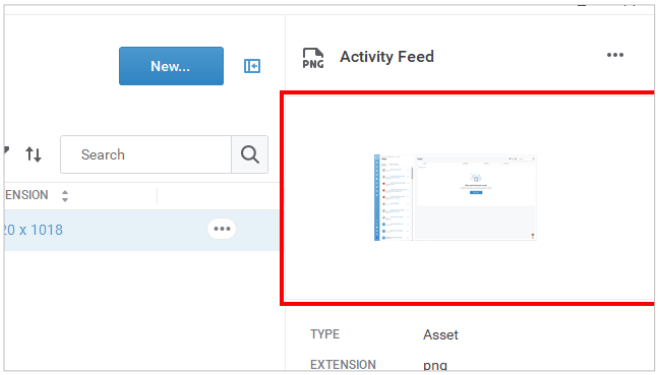
Click on the grid view cell **NAME** with data **Activity Feed**.



This represents the name of the asset. In our case, the name of the asset is **Activity Feed**.



Preview: This displays the preview of the asset you have selected.



9.2.5.2.1. General Details

Type: This represents whether it is a file or a folder.

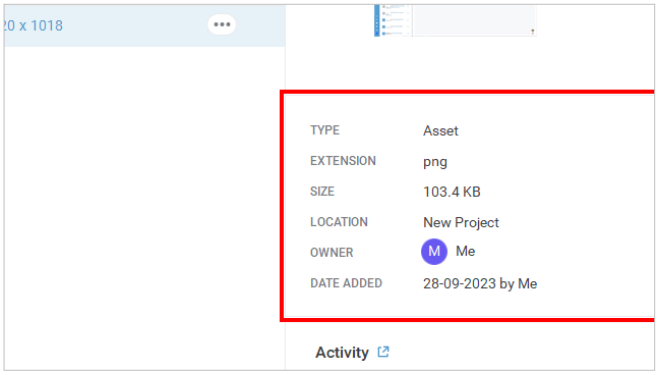
Extension: This represents the extension of the file jpg, png, etc.

Size: The size of the file.

Location: This displays the project name where the asset is.

Owner: The user name who has added the file.

Date Added: This reflects the date when the asset was added and the user's name.



10. Structure and Segments

10.1.What is Structure and Why It Matters

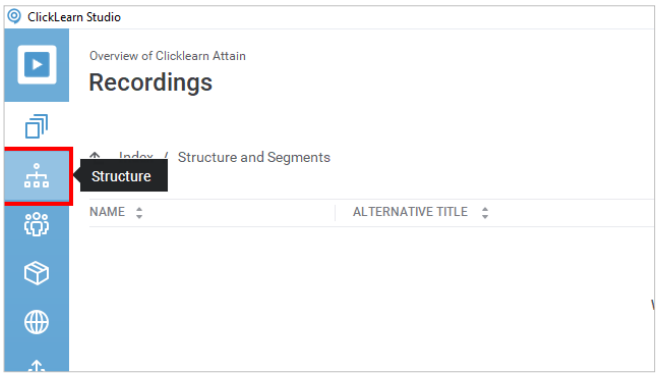
A clear framework for your content, to organize recordings and assets around how your users actually learn without overwhelming them.

10.1.1. Introduction

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

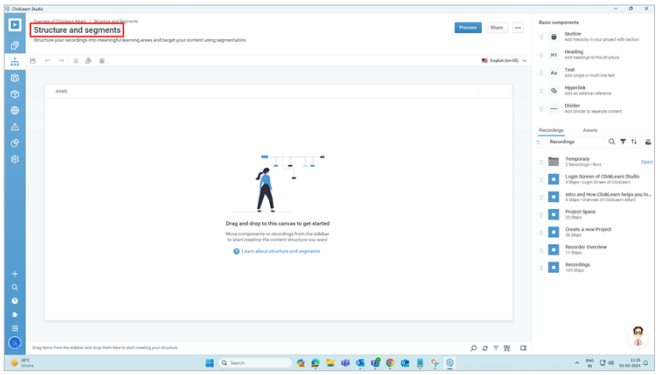
A **structure** is a way of sorting and naming your content based on user needs. You can also personalize the look of your portal by changing the icons and colors of the elements in the structure.

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



10.1.1.1. Overview of Structure

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

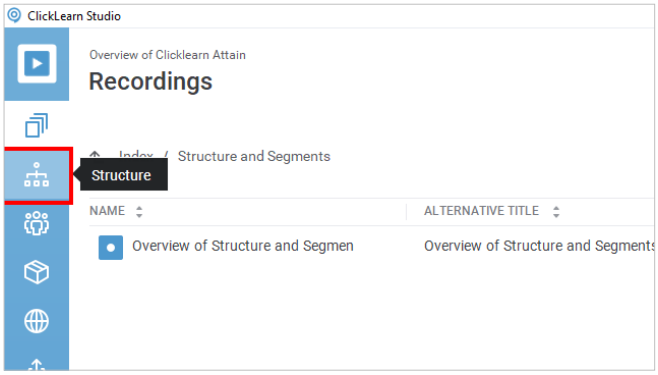


10.2.Basic components

Structure clear, engaging learning portals in ClickLearn Attain using drag-and-drop sections, headings, text, hyperlinks, and dividers that organize content and guide learners effortlessly.

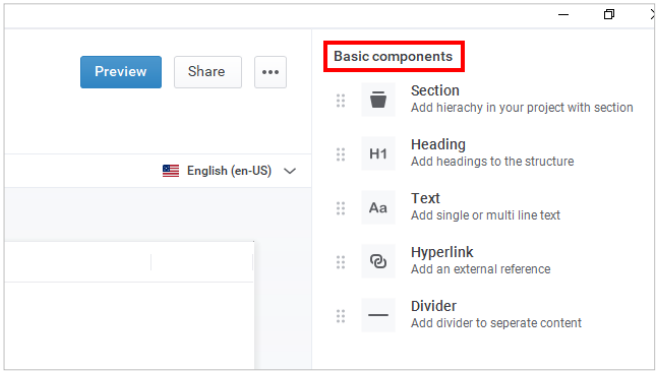
10.2.1. Basic components

Click on the button **Structure**.



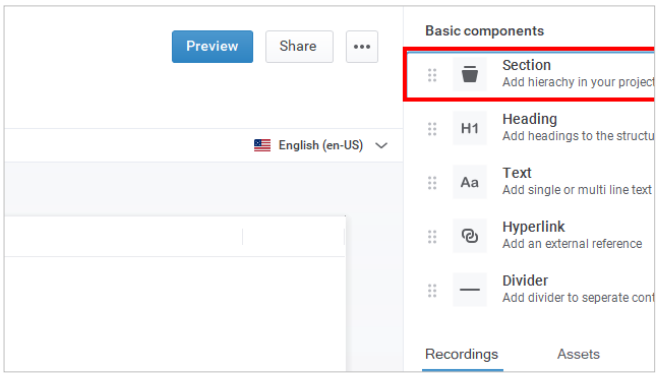
Let's get to know the essential components associated with structure. Following are the basic components as described below.

Click on the label **Basic components**.



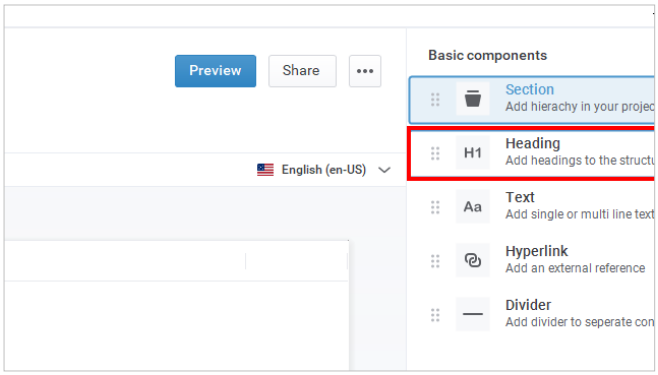
10.2.1.1. Section

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.



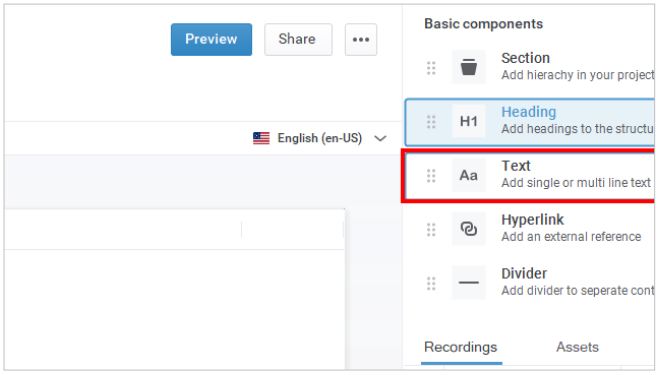
10.2.1.2. Heading

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.



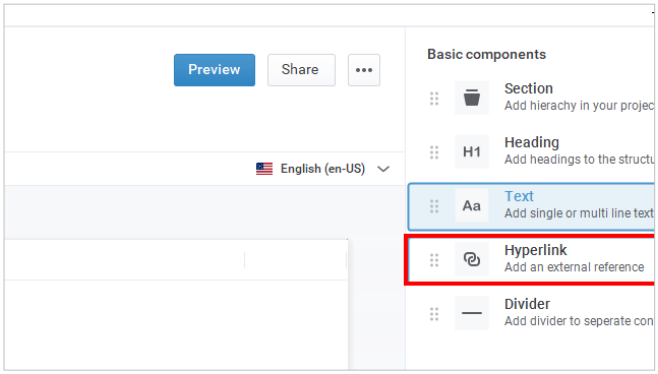
10.2.1.3. Text

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.



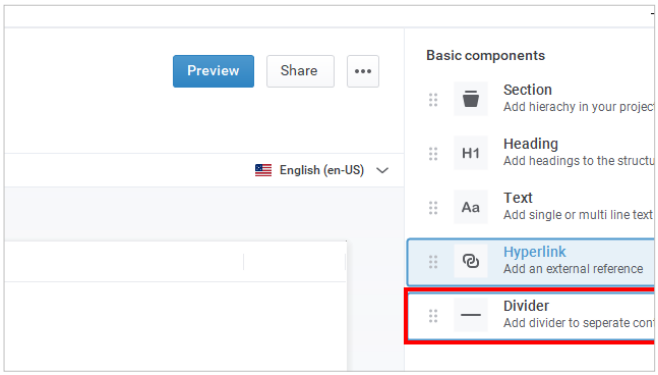
10.2.1.4. Hyperlink

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.



10.2.1.5. 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.

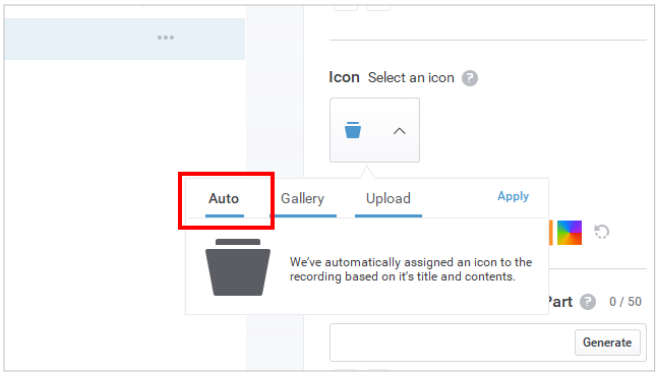


10.3. Configure Structure Components

Full control over every structure component, to title, style, segment, and enrich your content so your portal fits your brand and your audience without extra tools.

10.3.1. Common properties of basic components

10.3.1.1. Basic settings



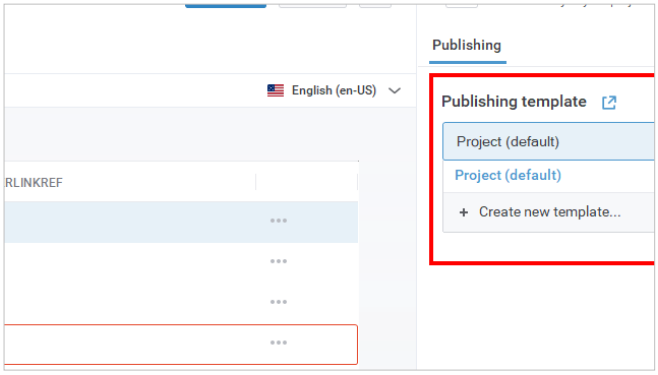
Listed below are the common properties of the basic components associated with the structure.
Title: You can rename the component in your structure based on your requirements.

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

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.

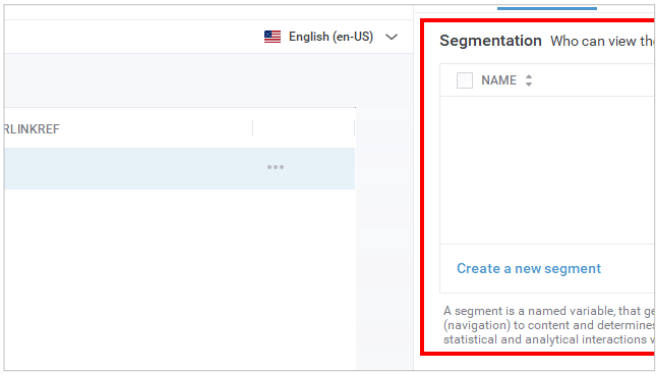
10.3.1.2. Advanced settings



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

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

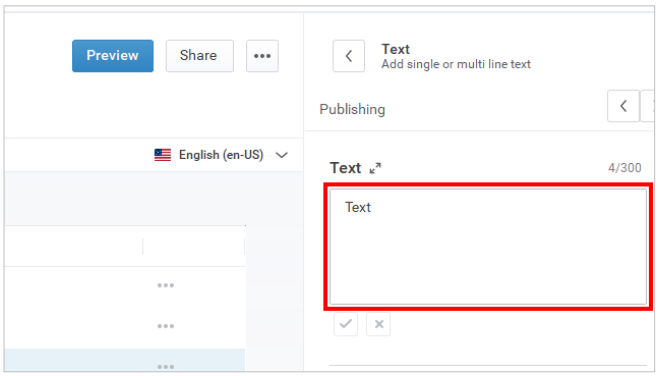
Create a new template: You can use the create a new template function to create your template based on your project needs.



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

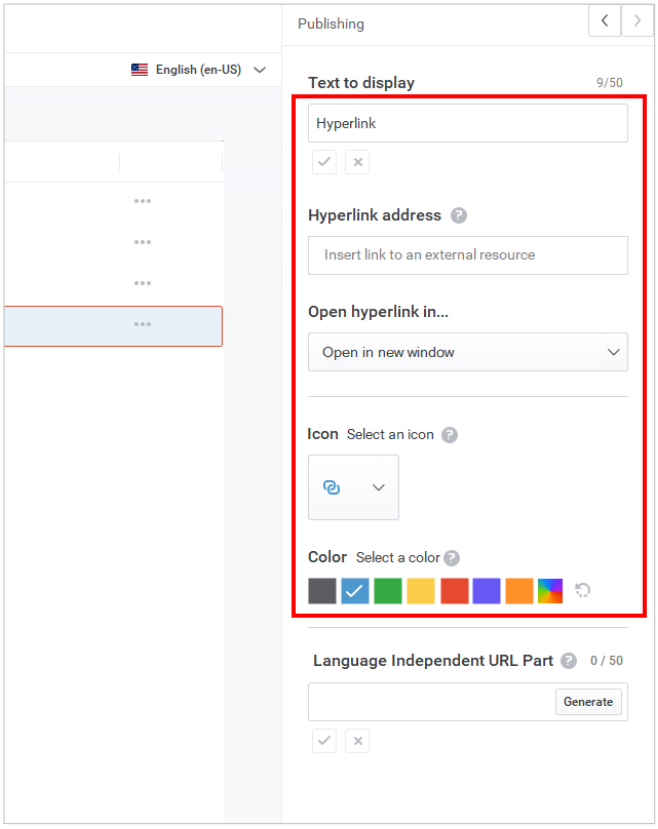
Create a new segment: You can also create a new segment. Enter the segment's name and save changes.

10.3.1.3. 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**.

10.3.1.4. Hyperlink



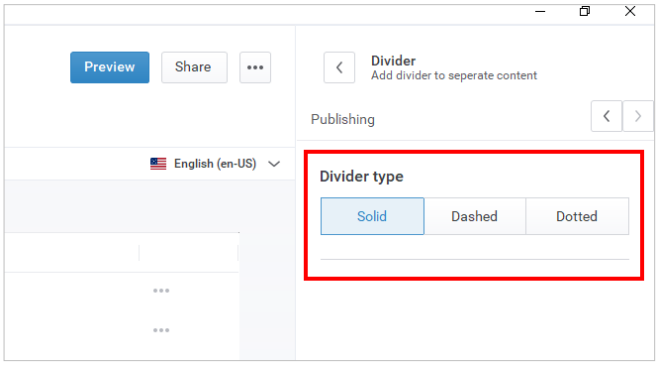
Text to display: You need to enter the Text for the link you want to show on your portal. The Text should be at least 50 characters.

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

10.3.1.5. Divider

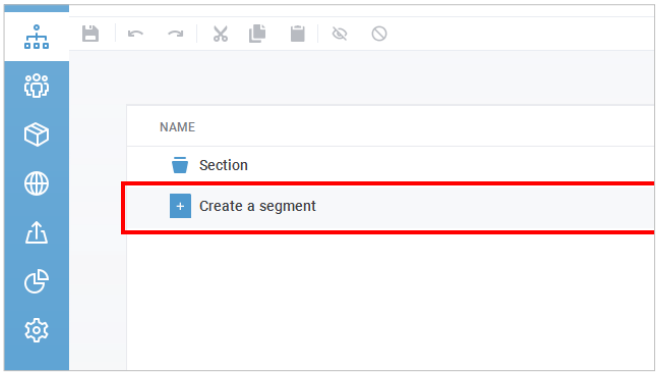


Divider: A divider is a horizontal line you can add to your learning portal structure. Separating different sections or elements can make your portal look more organized and visually appealing.

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.

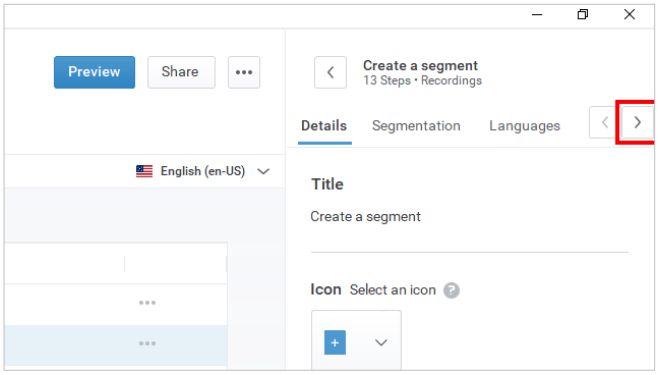
10.3.1.6. Properties



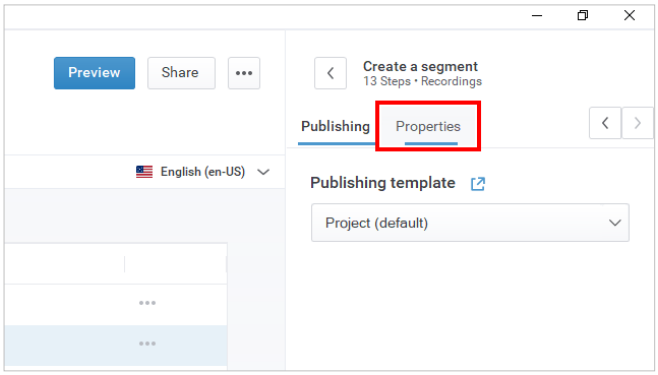
Choose the recording for which you want to see the properties.

Click on the grid cell **NAME** with value **Create a segment**

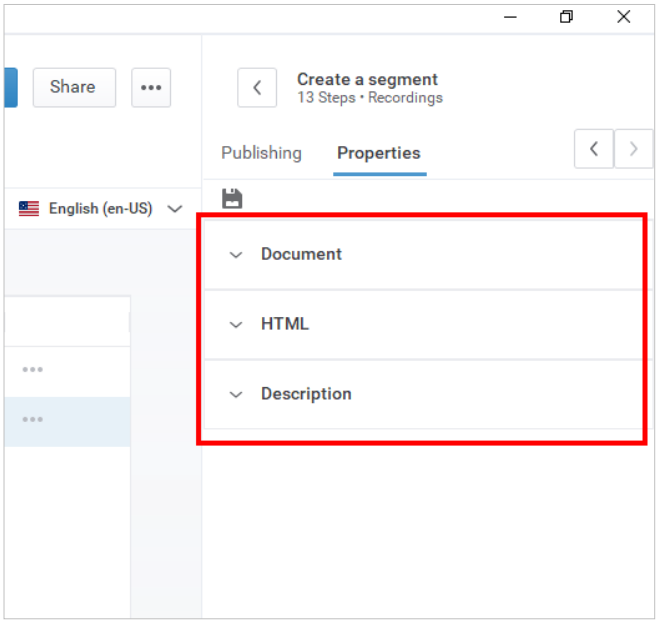
Click on the button **Right Arrow**



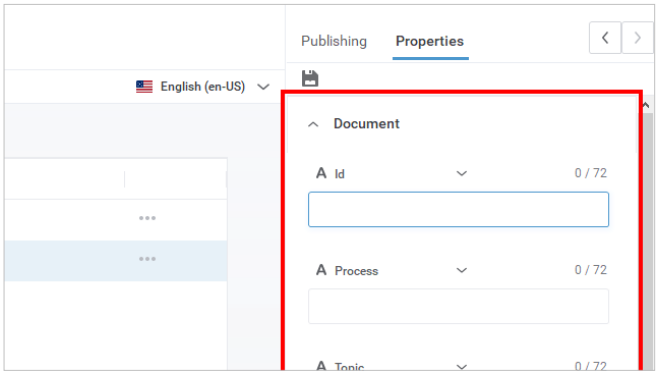
Click on the tab item **Properties**



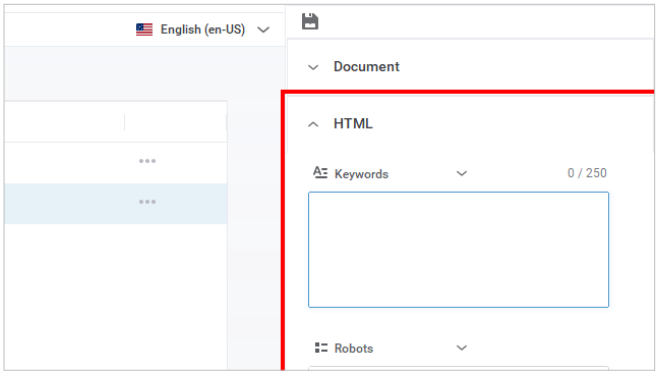
It shows the three properties linked to the recording: **Document, HTML,** and **Description.**



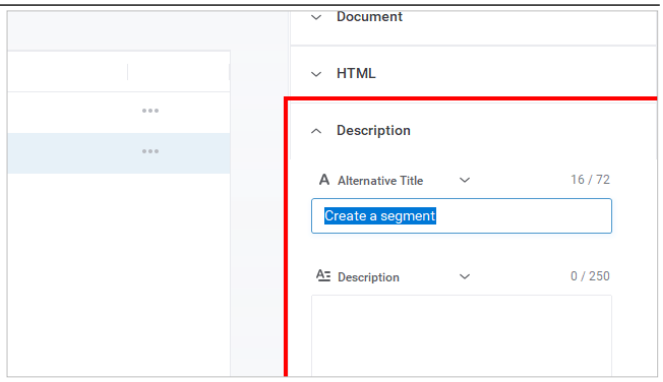
Click on the collapsible panel **Document** to see its associated properties.



Click on the collapsible panel **HTML** to display the keywords and robots for that specific recording.



Click on the collapsible panel **Description** to view the Alternative Title and Description for that specific recording.



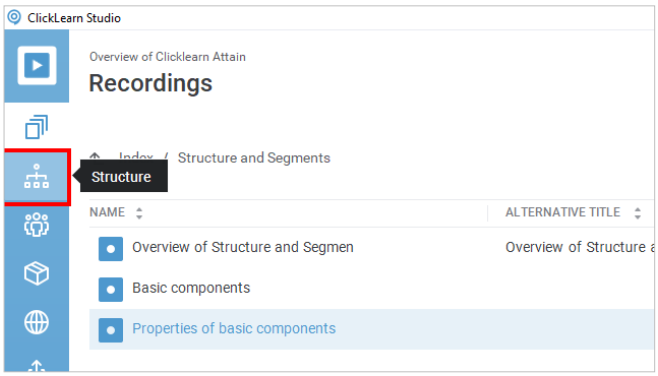
10.4.Add Recordings and Assets to Structure

One place to build out your structure, to pull in recordings and assets, then search, filter, sort, and explore your way to the right content without leaving the tab.

10.4.1. Recordings and Assets

To access the essential components (recordings and assets) in the structure.

Click on the button **Structure**.

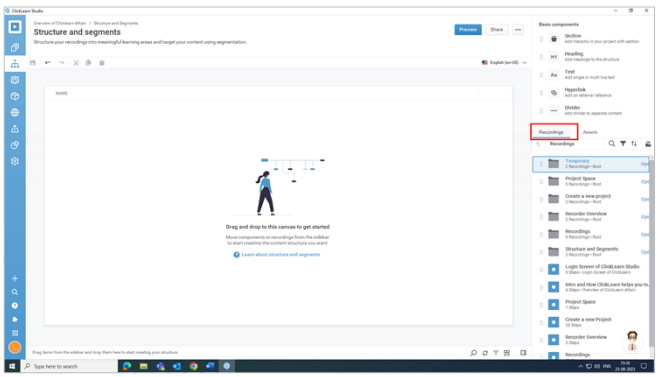


10.4.1.1. Recordings

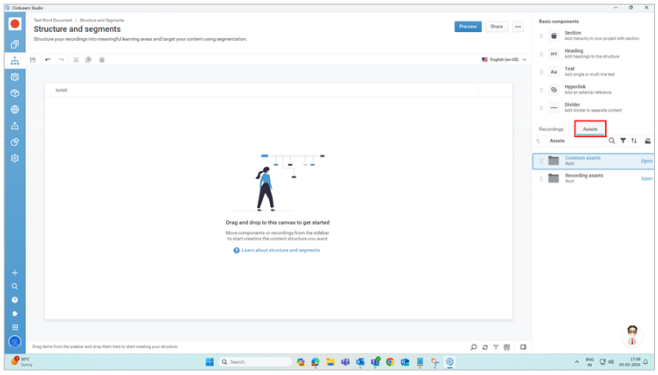
Click on the tab item **Recordings.**

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.



10.4.1.2. Assets



Click on the tab item **Assets**.

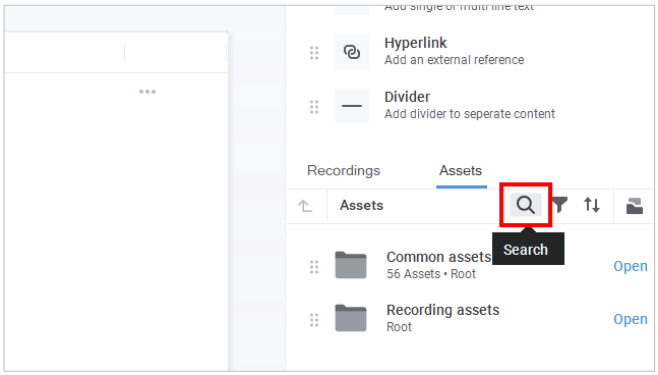
Assets are the files or folders you can upload to your project directory and use in your recordings.

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.

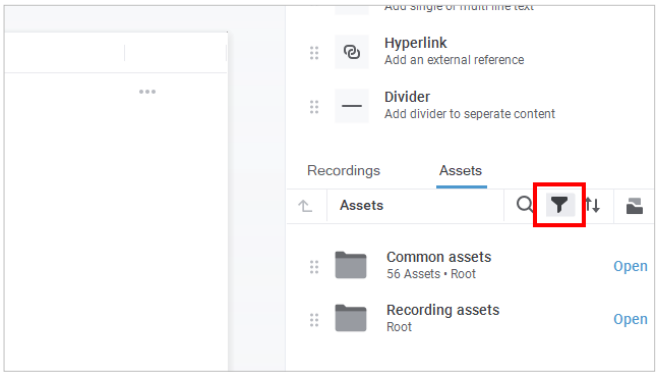
10.4.1.3. Other basic elements associated with recordings and assets

10.4.1.3.1. Search



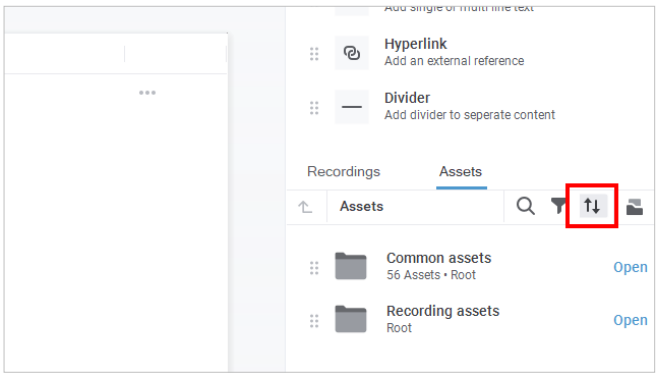
Search: This feature lets you search for the recordings and assets from the respective tabs.

10.4.1.3.2. 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.

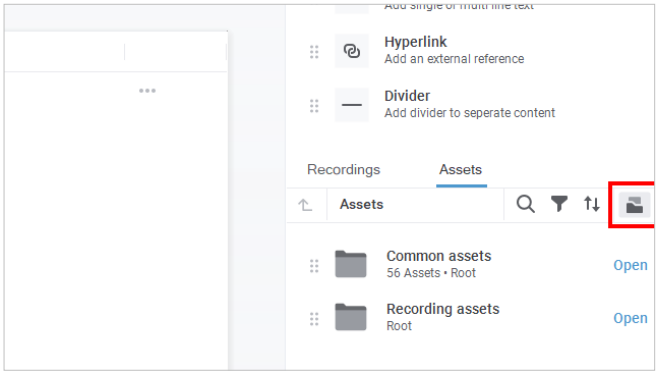
10.4.1.3.3. Sort



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.

10.4.1.3.4. 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.



10.5.Save, Navigate, and Edit Structure

10.5.1. Tool Strip Buttons

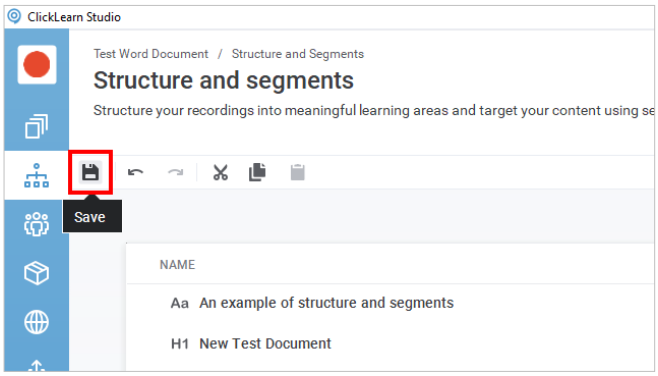
Everyday editing at your fingertips, to save, undo, redo, cut, copy, and paste your structure without breaking your flow.

10.5.1.1. Tool strip buttons

10.5.1.1.1. Save

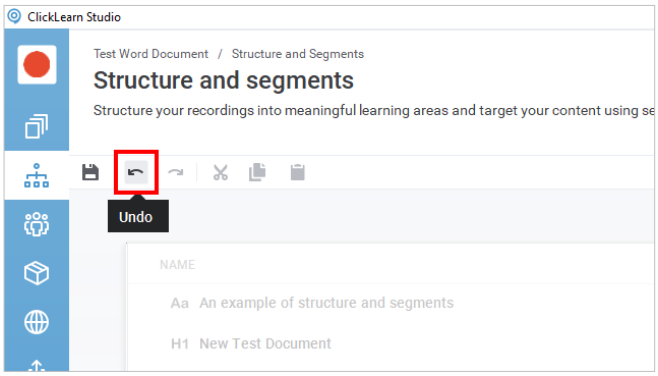
Let's get to know the essential elements associated with structure and segments.

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



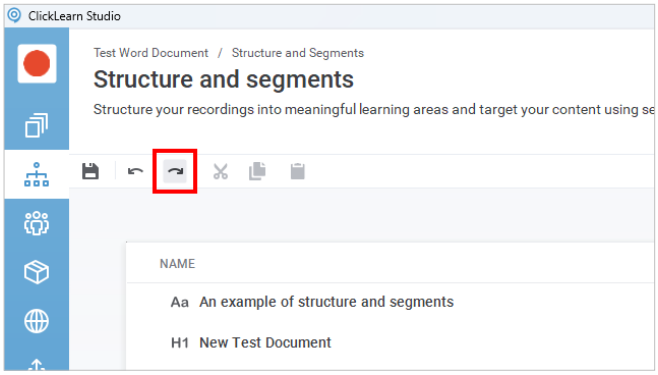
10.5.1.1.2. Undo

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



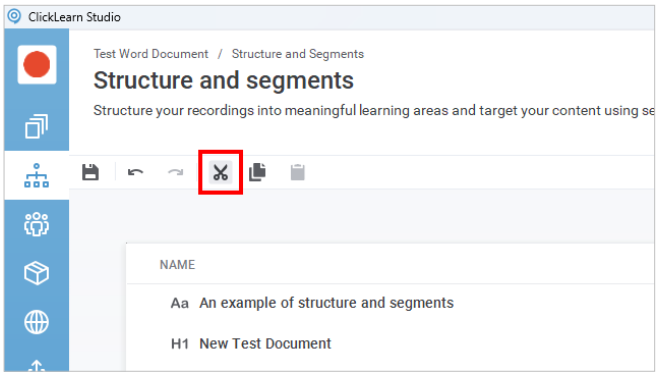
10.5.1.1.3. Redo

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



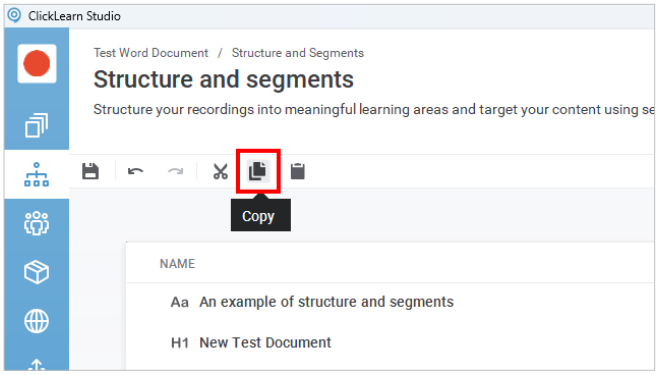
10.5.1.1.4. Cut

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



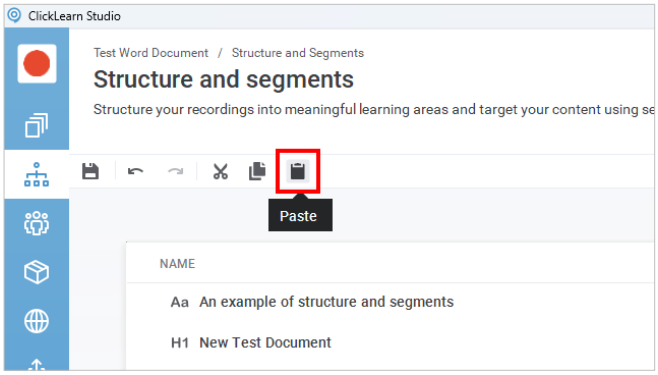
10.5.1.1.5. Copy

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



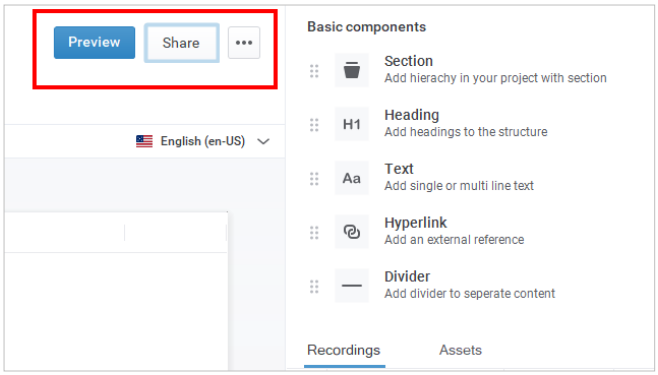
10.5.1.1.6. Paste

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



10.5.2. Preview, Share, and More

10.5.2.1. Top right corner elements of structure



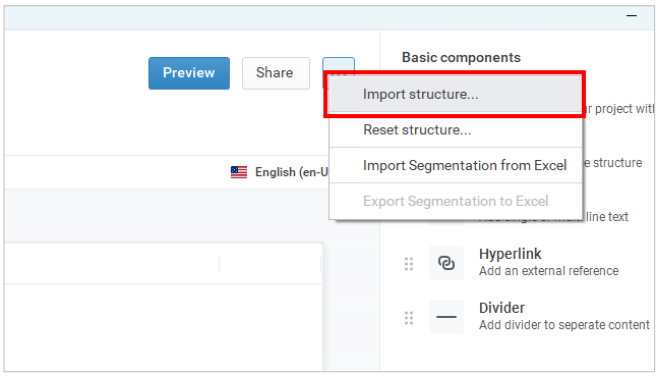
Preview: With the preview feature in ClickLearn Attain, you can preview your learning content as a web page before you publish it.

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

Share: This function allows you to share a recording with colleagues inside or outside your organization. For a detailed walkthrough, refer to the recording under **Recordings >> Recording Menu Options >> More Options in the Recording Menu.**

More: More function offers four different options.

10.5.2.2. 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.

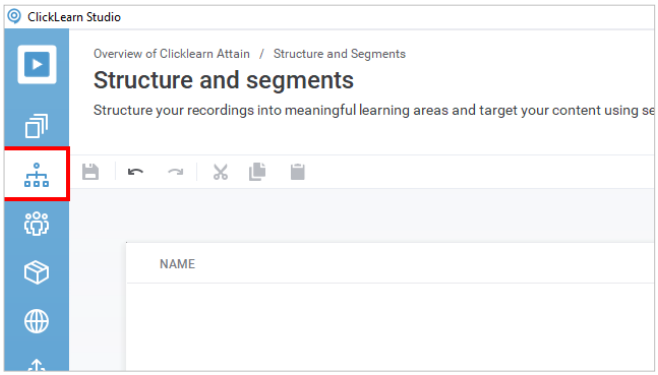
Export Segmentation to Excel: This function allows you to export your segmentation to an Excel file.

10.5.3. Functions at the bottom right corner

Fine-tune your structure view, to search, refresh, filter, choose columns, and collapse panels so you see exactly what you need without the clutter.

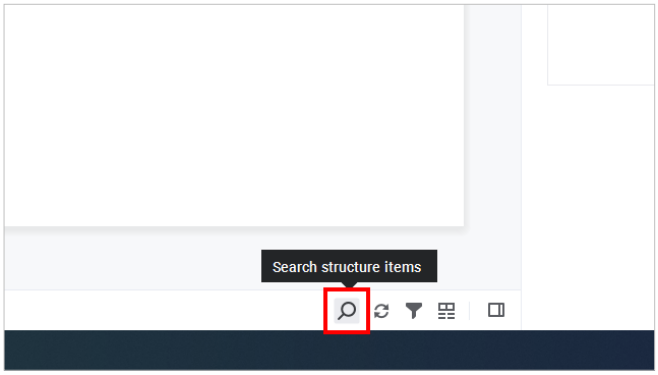
10.5.3.1. Other functions of structure and segments

Click on the button **Structure**.



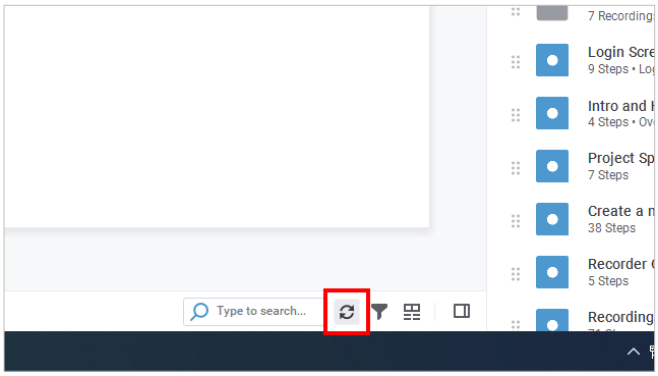
10.5.3.1.1. Search

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



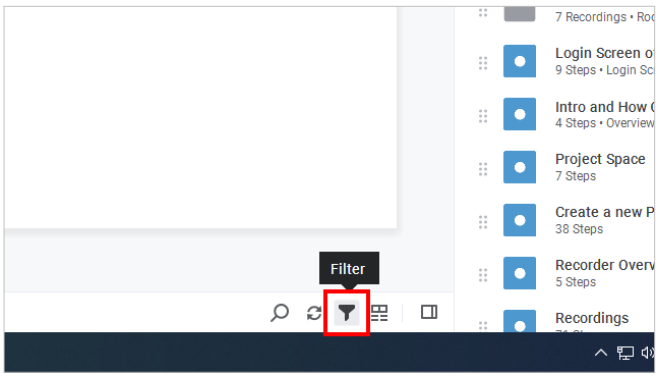
10.5.3.1.2. Refresh

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



10.5.3.1.3. Filter

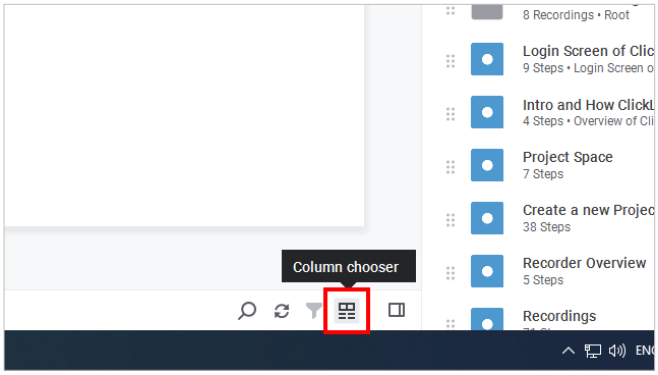
Filter: By selecting the column and type from the list, you can use this feature to find the structures you want and navigate through complex lists easily. You can also specify your search criteria to suit your needs.



10.5.3.1.4. Column Chooser

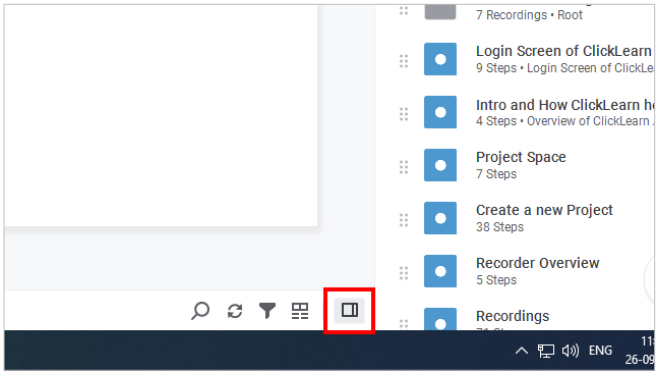
Column chooser: This feature lets you customize the main screen of the structure by selecting the columns you want to see. Below are the columns you can add to your structure based on your needs.

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



10.5.3.1.5. Collapse

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

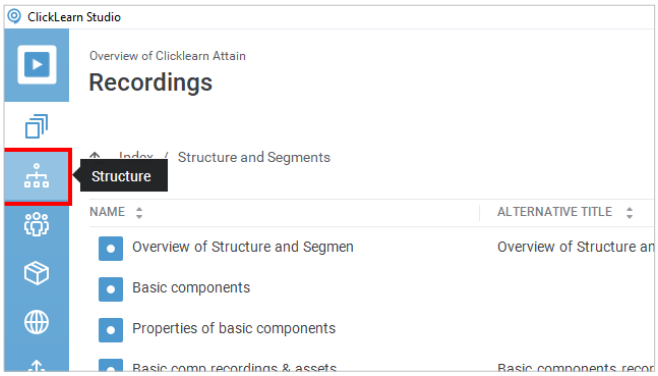


10.6.Import Structure from Another Project

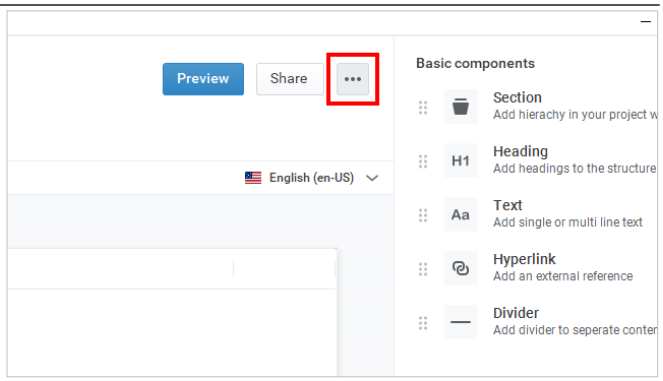
A head start on new projects, to import a ready-made structure from another project instead of building it from scratch.

10.6.1. Import structure from another project

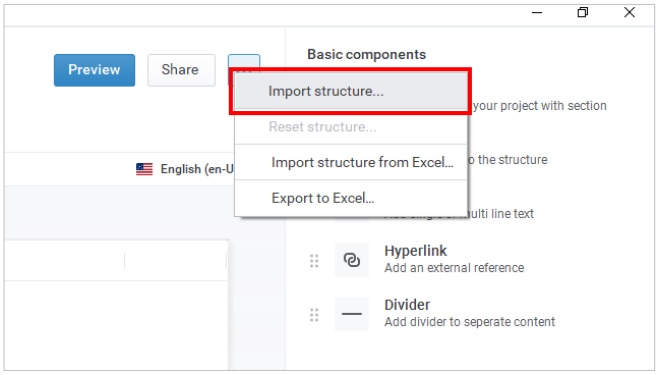
Click on the button **Structure**.



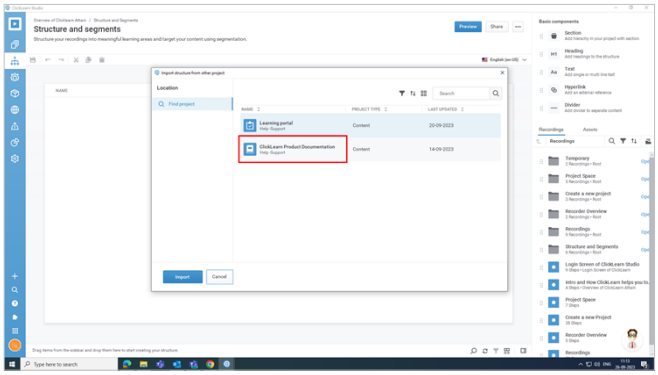
Click on the icon **Structure More**.



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.



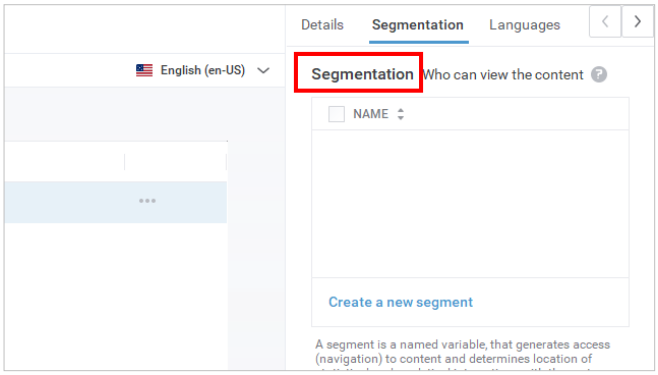
10.7.Create and Manage Segments

10.7.1. Create a segment

Deliver the right content to the right teams by creating segments that publish tailored variations from a single project, each with its own shareable link.

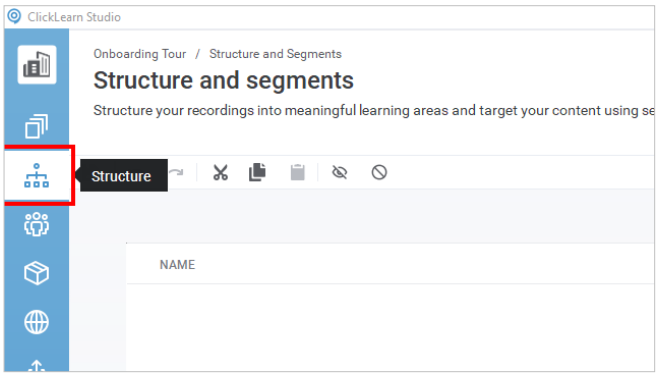
10.7.1.1. Introduction

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.



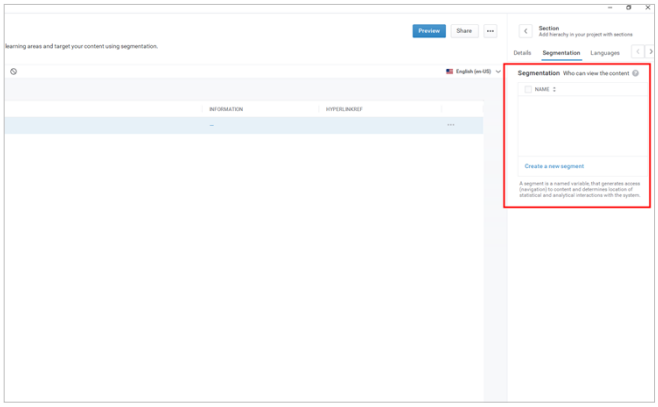
10.7.1.1.1. Create a segment

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

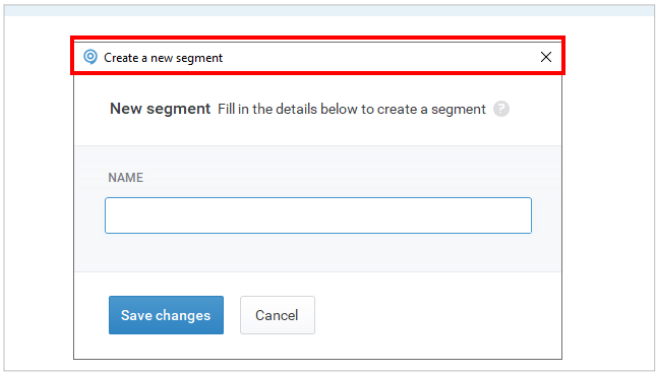


Create a Segment

4. You can select any grid cell from your structure screen.
5. Under **Segmentation**, you can find a button to create a new segment.
6. 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.



10.7.1.1.2. 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.

10.7.2. Adding components to segments

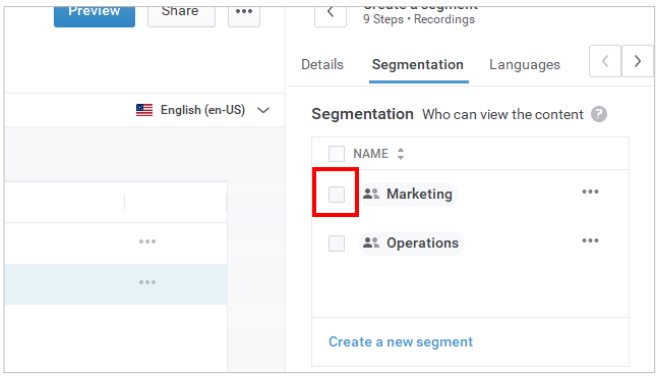
Assign headings, sections, and recordings to one or more segments, then preview each segment to confirm every audience sees exactly the content intended for them.

10.7.2.1. Add a heading/section/recording to the segment.

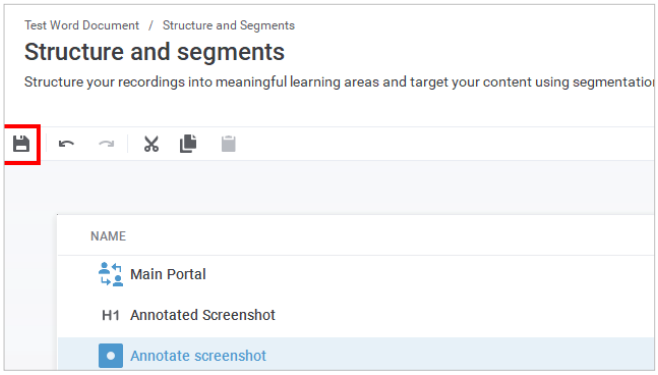
Adding components to segments

To add any element from the structure to a specific segment, select the element.

Click on the desired element; in this case we have selected the list view item **Marketing**

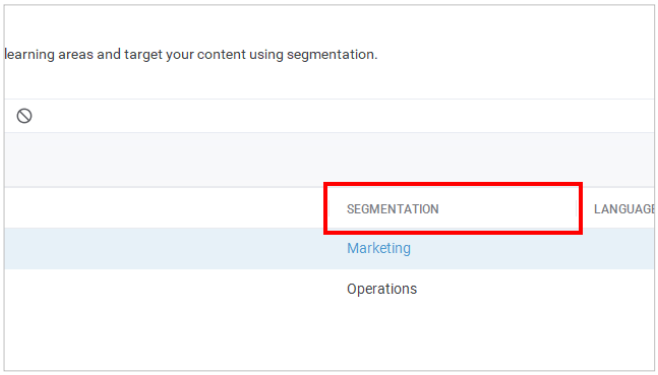


7. Click on the grid cell **NAME** with the value Annotate Screenshot.
8. Select the segment you wish to include. Click on the checkbox.
9. Click on the icon **Save.**

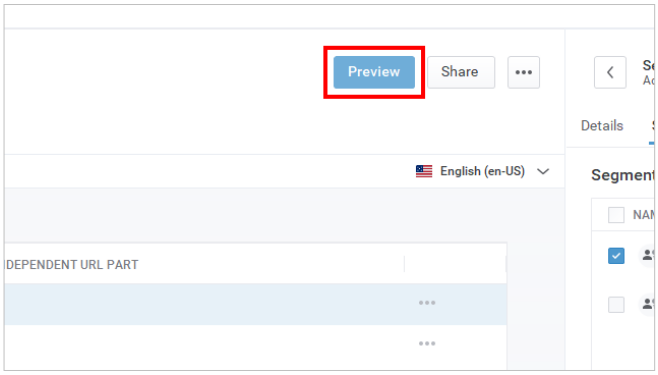


SEGMENTATION: As shown in the segmentation column, we have assigned each recording to one or more segments.

NOTE: Segmentation will also display the elements that are not a part of any segments.



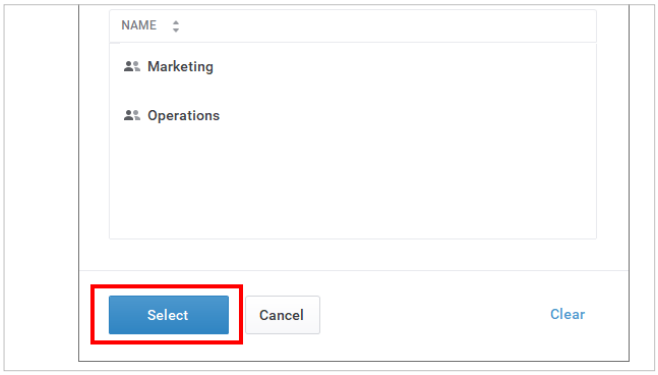
Preview: This option helps to preview your structure and segments.



Segmentation: This option allows you to preview the content based on the segments you have created.

This pops up a new dialog box with your created list of segments.

Select the segment you wish to preview and click on **Select.** It displays a preview of the selected segment.



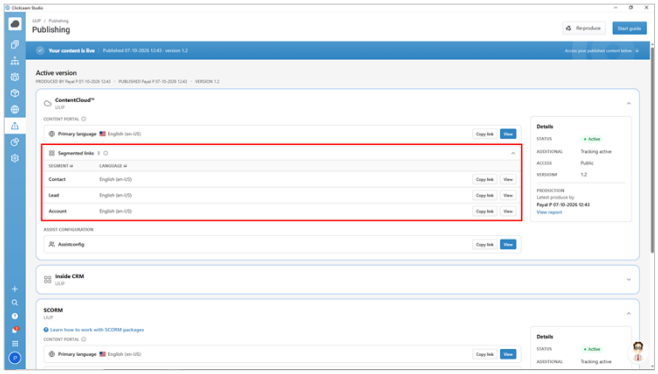
10.7.3. View the segmented content links

Share the right content with each audience using dedicated segment links, available on the publishing screen to copy and distribute once your project is published.

10.7.3.1. Introduction

On the publishing screen, separate links for the segments will be visible after you produce and publish your project.

You can copy and share the content links of the segments according to who your end users are.

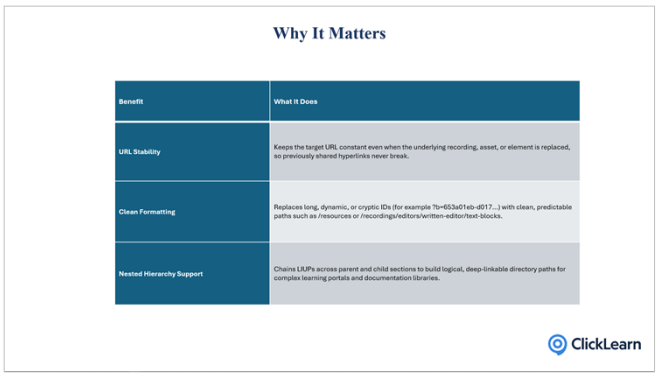


10.7.4. Language Independent URL Part

Keep shared links working permanently with LIUP, which assigns readable, stable URLs to sections and recordings so content stays easy to identify, even after updates.

10.7.4.1. Introduction

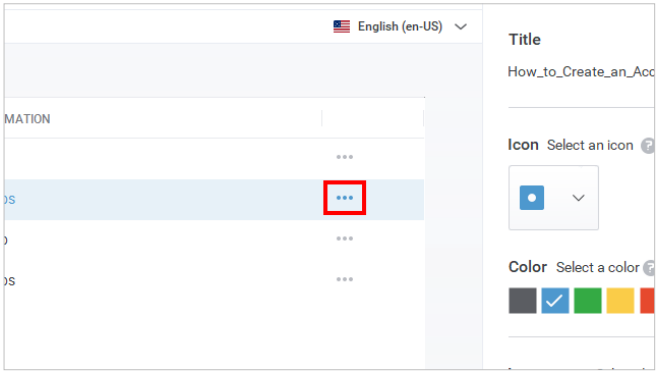
LIUP (Language Independent URL Part) is a structural configuration feature in **ClickLearn Studio** that assigns a consistent, human-readable slug or identifier to a section, folder, or recording within a project's hierarchy. By default, published ClickLearn content relies on system-generated IDs.



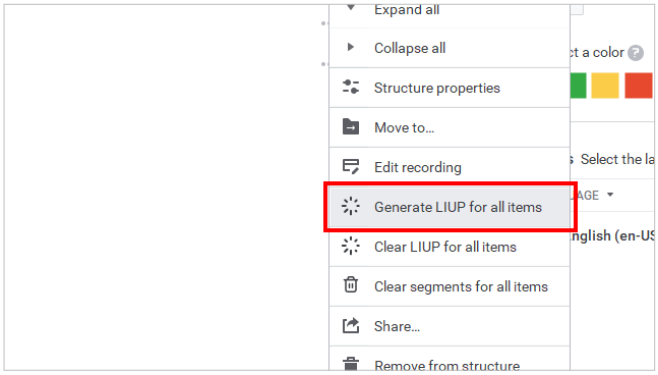
10.7.4.2. Generating, Clearing, and Customizing LIUP

If the underlying recording or element is replaced, its ID changes, and any previously shared hyperlink stops working. Assigning a LIUP prevents this by keeping the URL fixed, no matter what changes behind the scenes. Use the steps below to generate, clear, and customize a LIUP directly from the grid in **ClickLearn Studio**.

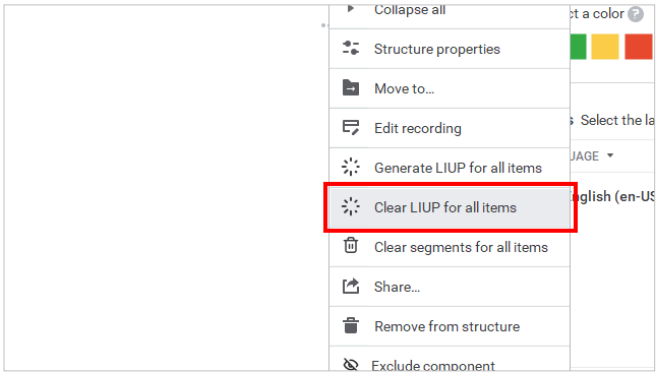
To generate the LIUP directly to all recordings, Click on the button **More Options** of grid cell **Action**



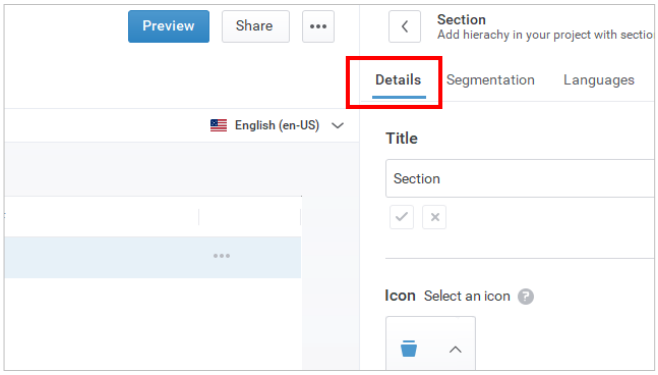
Click on the menu item **Generate LIUP for all items**



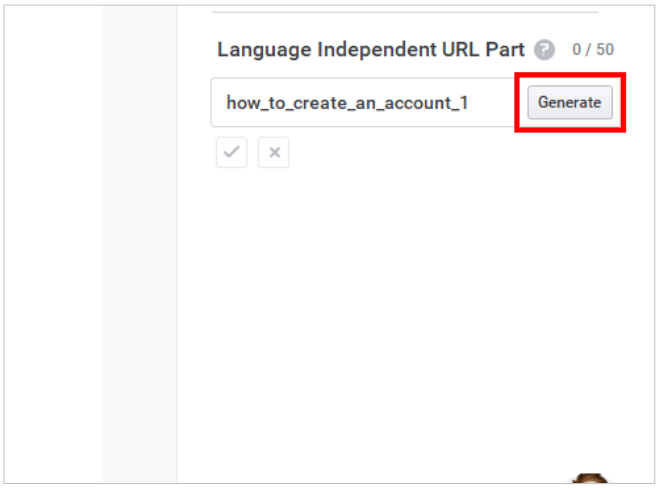
To clear the LIUP from every recording, Click on the menu item **Clear LIUP for all items**



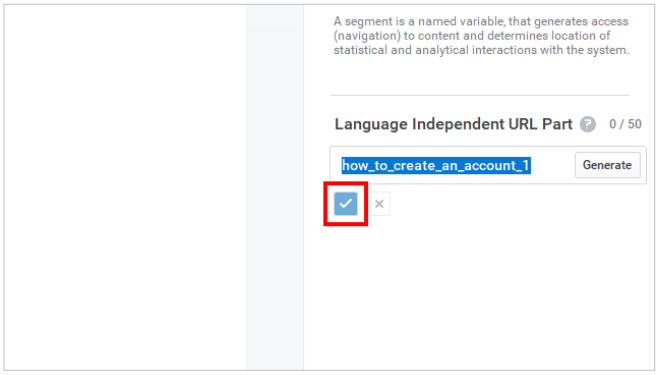
Click on the **Details**- Add the LIUP name to access the selected recording or section using this name in your content URL.



Click on the button **Generate** to auto-create it, or type your own LIUP name.

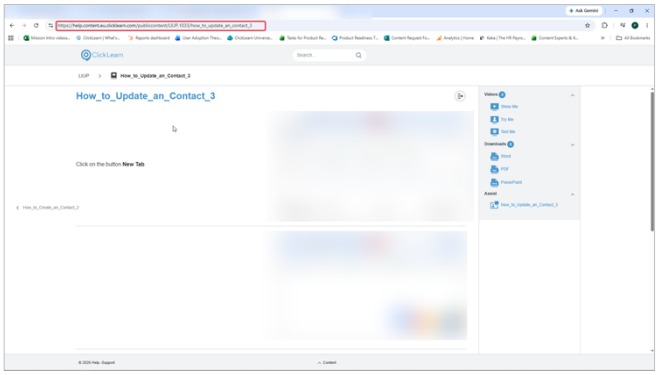


Click on the icon **YesLIUP** to confirm and apply the LIUP.



10.7.4.3. Conclusion

After **Publishing**, you'll see how the LIUP name in the link makes your work effortless.



Without LIUP:
https://help.content.eu.clicklearn.com/publiccontent/ClickLearn%20Product%20Documentation.1033/ClickLearn%20Product%20Documentation.htm?r=bf79f179-a05c-4d4d-9af4-6ee0d0639287

With LIUP:
https://help.content.eu.clicklearn.com/publiccontent/ClickLearn%20Product%20Documentation.1033/uxp/manage-sources/additional-ai-sources

The URL without LIUP only contains the recording ID. In contrast, the URL with LIUP includes the configured LIUP path, making it easier to identify both the content and the section it belongs to.

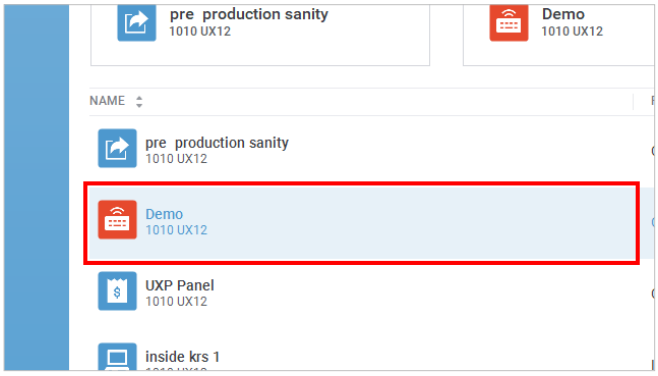
10.7.5. Export Segmentation to Excel

Export project segmentation to Excel to review, add, edit, or reassign segments in bulk, making large-scale audience targeting faster and easier to manage.

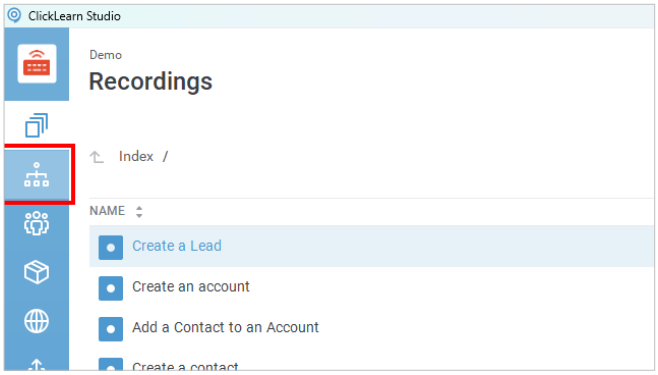
10.7.5.1. Export Segmentation to Excel

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.

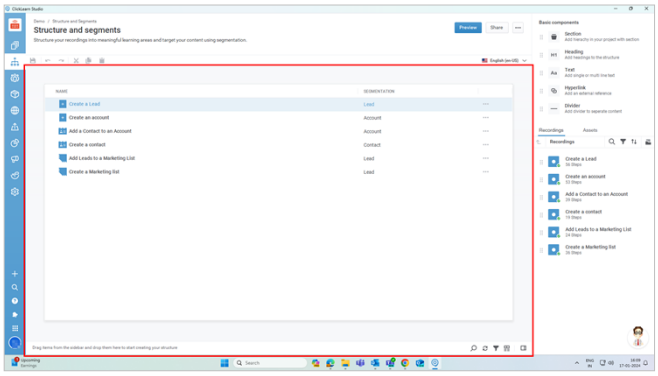
Double-click on the grid cell **NAME** with the value **Demo**.



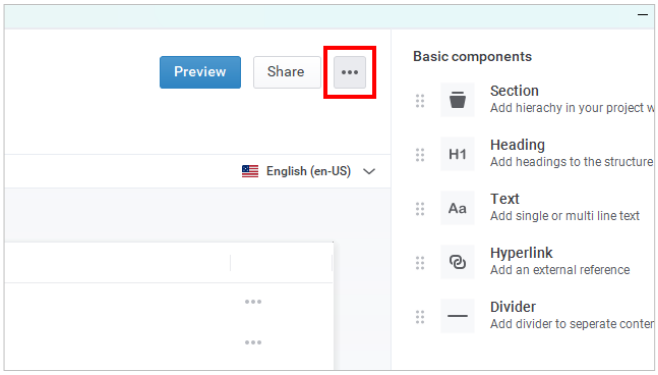
Click on the button **Structure**.



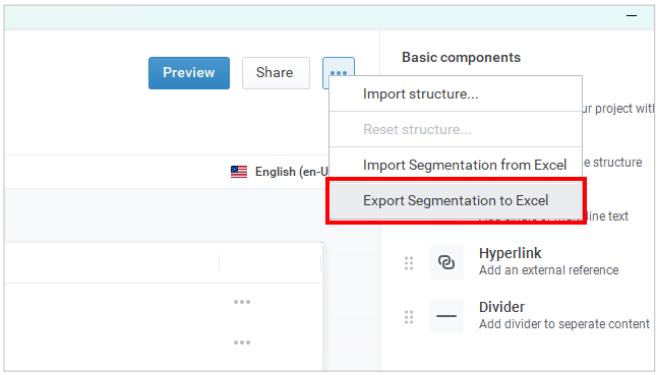
This project has split the recordings into different segments.



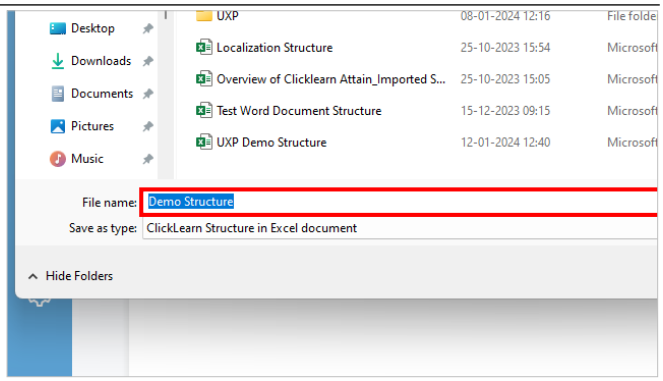
To export segmentation, click on the icon **Structure More**.



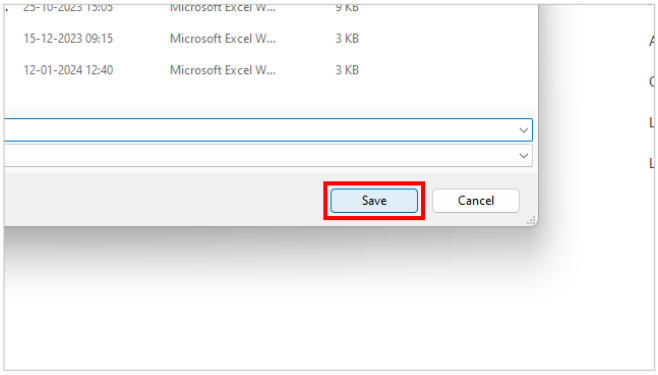
Click on the menu item **Export Segmentation to Excel**.



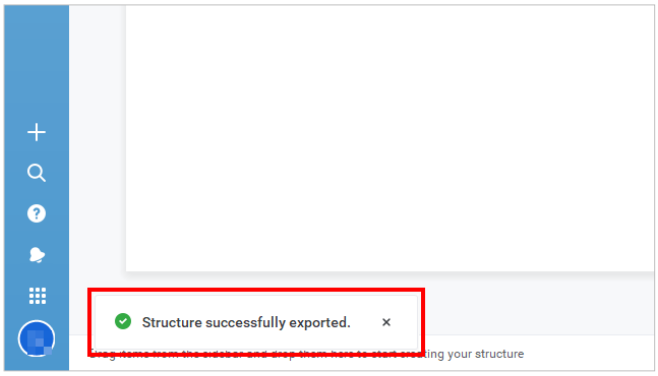
You can choose the location where you want to save the file.



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

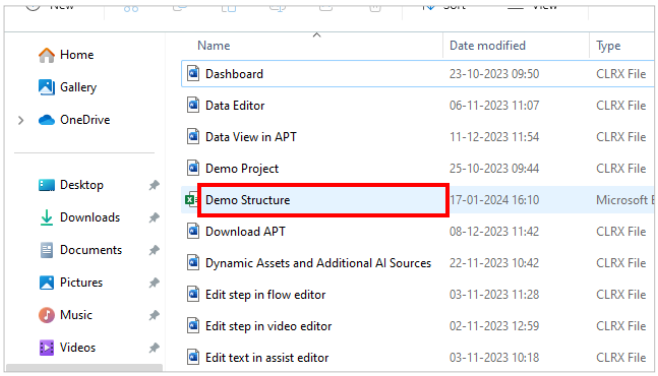


After successfully exporting the segments, a notification appears in the bottom-left corner stating, '**Structure successfully exported**.'

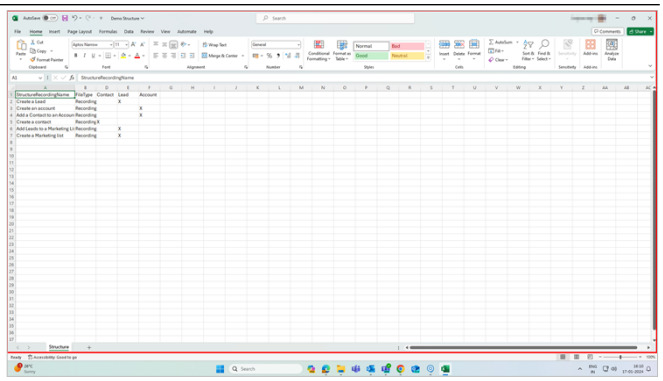


10.7.5.1.1. View the exported Excel file.

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.

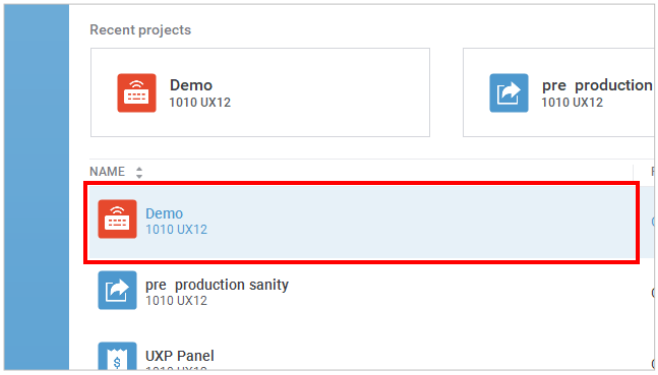


10.7.6. Import Segmentation from Excel

Bring new and updated segments into your project from an edited Excel file, streamlining bulk segmentation changes and keeping content aligned with every audience.

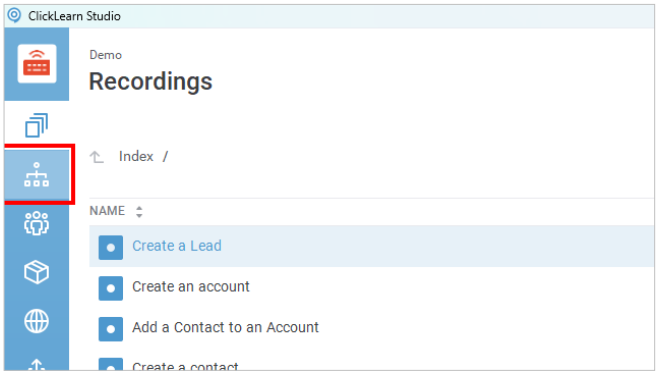
10.7.6.1. Import Segmentation from Excel

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.

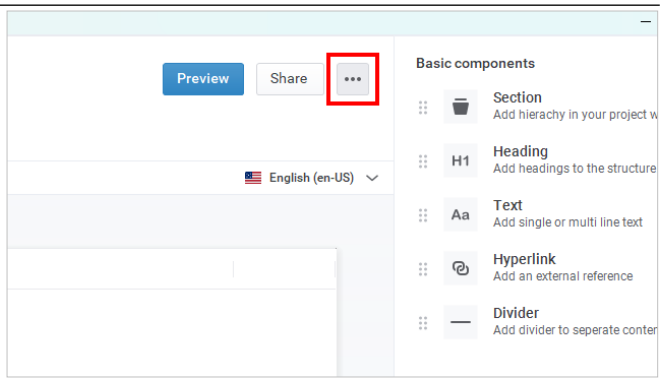


Double-click on the grid cell **NAME** with the value **Demo**.

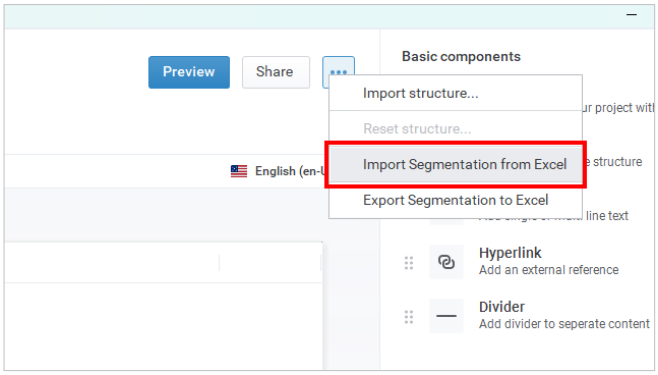
Click on the button **Structure**.



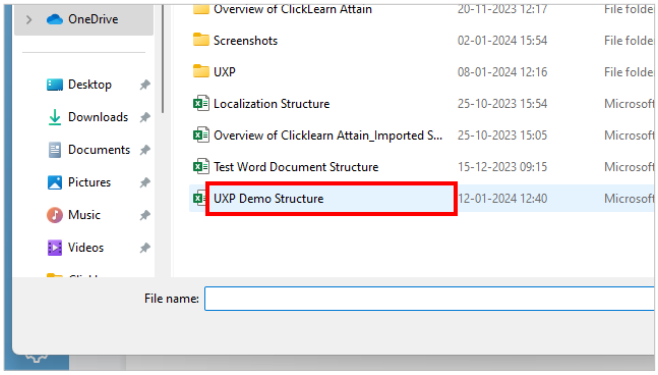
To import segmentation, click on the icon **Structure More**.



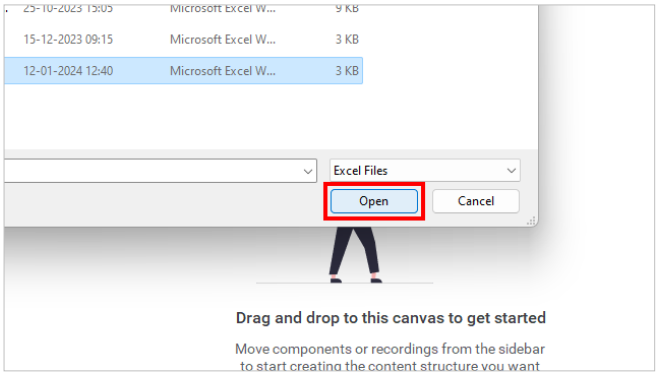
Click on the menu item **Import Segmentation from Excel**.



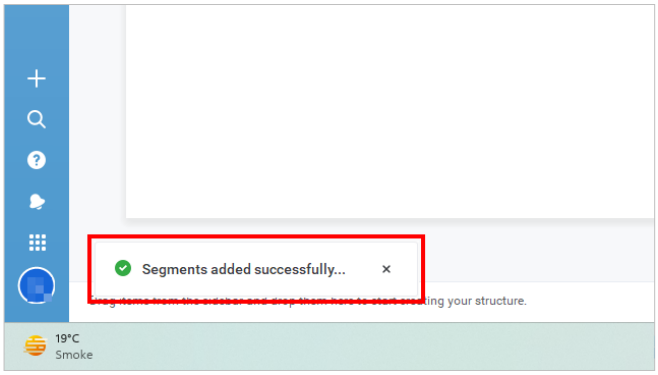
Select the Excel file to import.



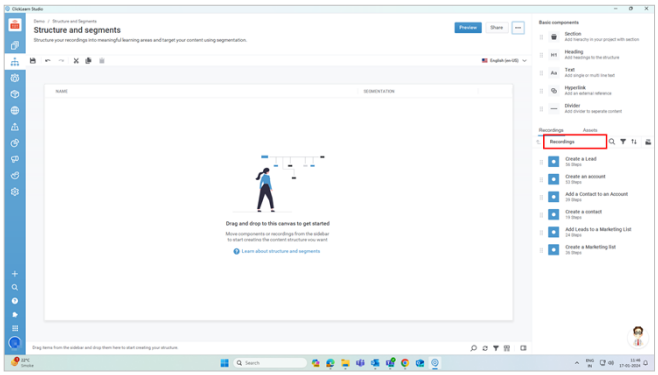
Click on the **Open** button. You may also press **Alt+O**.



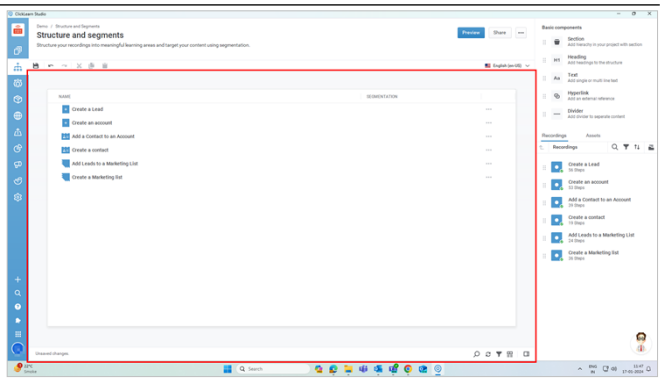
After importing the segments from the Excel file, a pop-up message at the bottom left displays, showing they were successfully added.



Select the **Recordings** for segmentation.

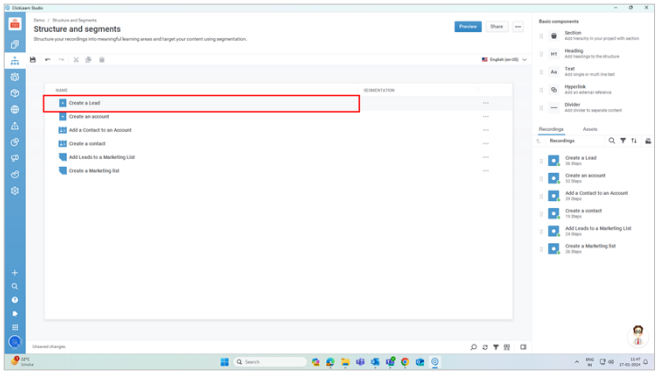


The recordings are now a part of the structure panel. We need to segment these recordings based on the segments we have imported.

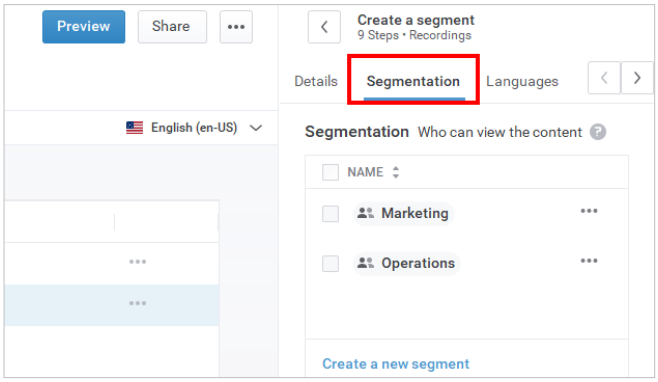


10.7.6.1.1. Assigning segments to each recording

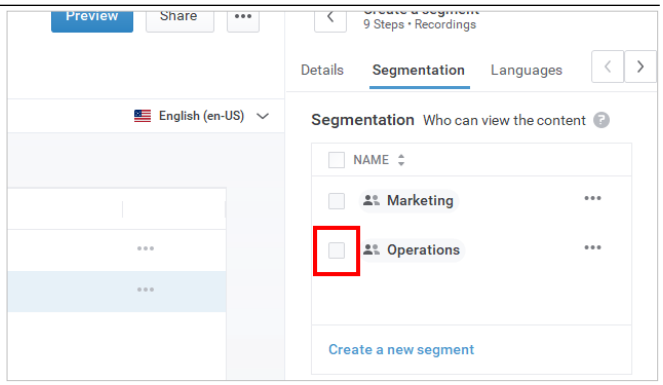
Click on the grid cell **NAME** with the value **Create a Lead**.



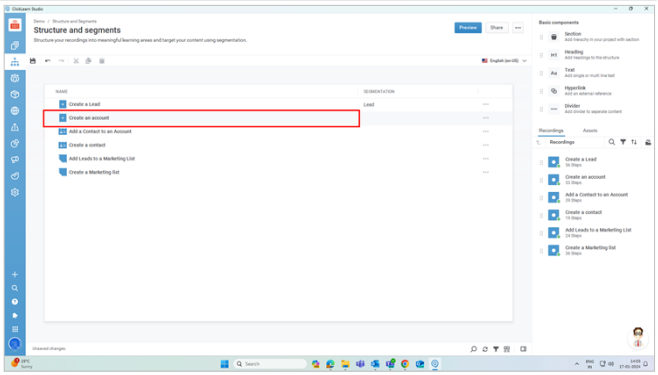
Click on the button **Segmentation.**



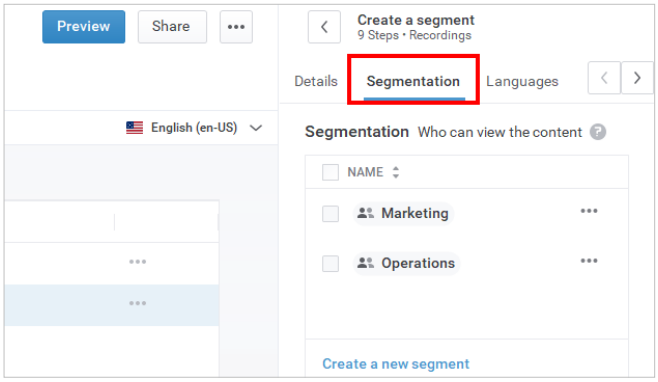
Click on the checkbox to select the desired segment. In this case, we have slected the list view option **Operations**.



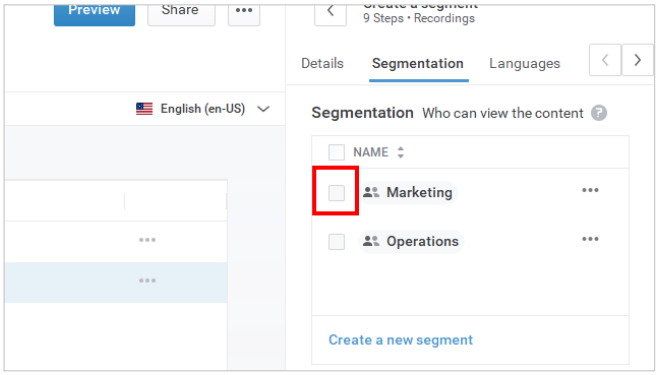
Click on the grid cell **NAME** with the value **Create an account.**



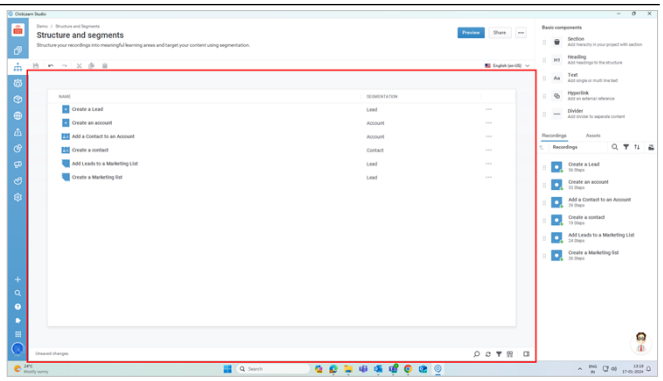
Under **Segmentation,** Click on the desired item for the account. In this case, we have selected the list view item **Marketing**



Click on the list view item **Marketing**



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



11. Localization

11.1.What is Localization and When to Use It

A wider reach for your content, to translate and adapt your projects into any language so you can grow adoption without rebuilding materials from scratch.

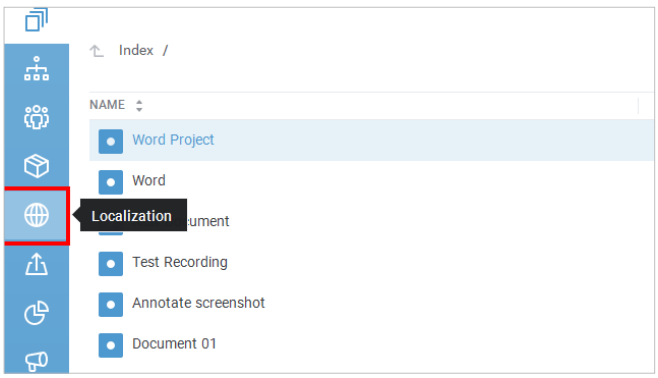
11.1.1. Introduction

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 for localizing your learning materials. Its localization feature allows you to easily translate your projects into different languages based on user requirements.

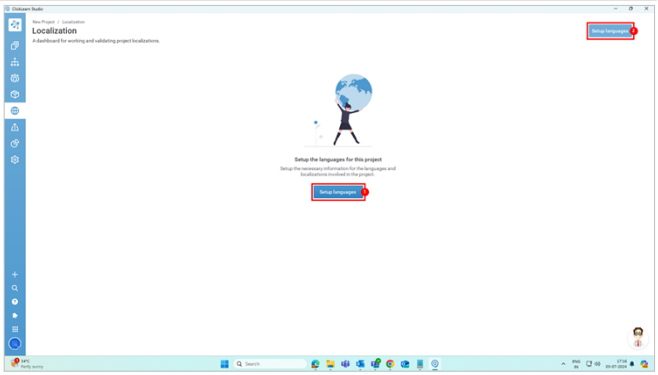
When creating a project, you need to select **at least**



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.

11.2.Manage Languages and Run the Analyzer

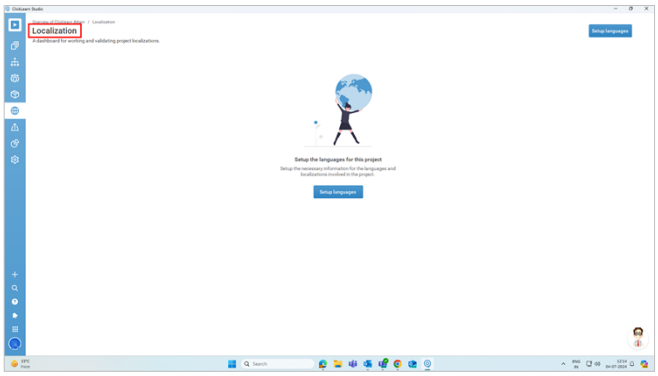
11.2.1. Localization Dashboard

A clear view of your translation progress, to spot missing translations, track status, and see assignees at a glance without digging through each project.

11.2.1.1. Localization Dashboard

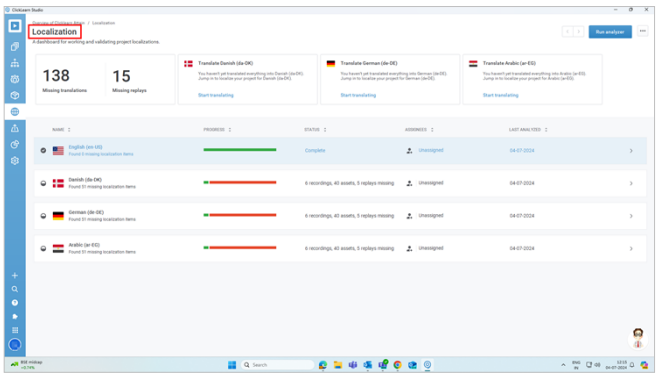
11.2.1.1.1. New User

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



11.2.1.1.2. Existing User

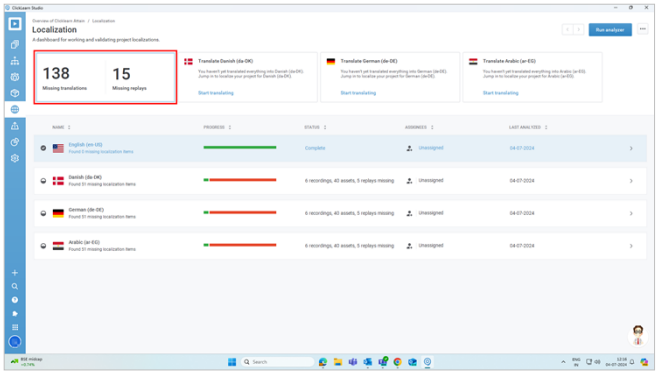
Existing User: This is how the **Localization** screen looks for an existing user.



11.2.1.2. Dashboard Details

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

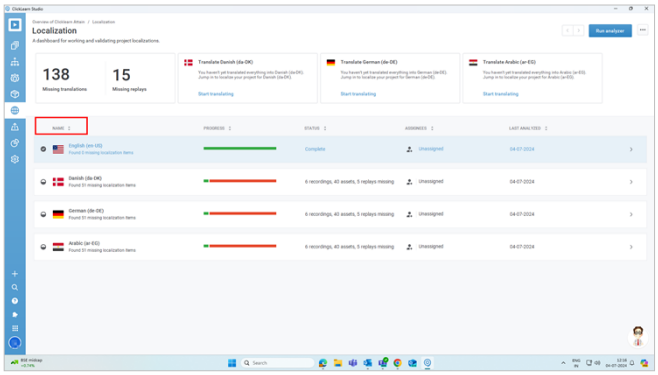
Missing replays: This shows the number of missing replays for that project.



11.2.1.3. Other Elements

11.2.1.3.1. Name

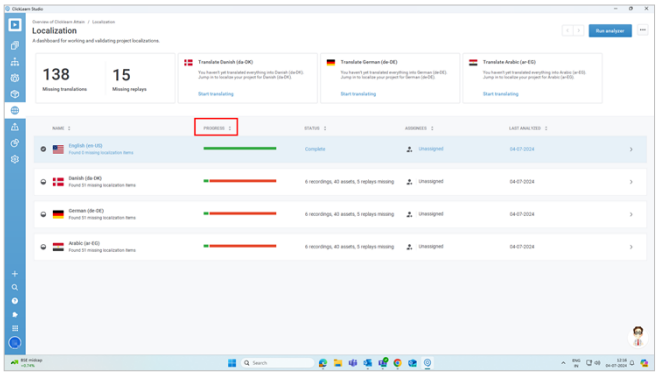
Name: The **NAME** and number of languages included in the project.



11.2.1.3.2. Progress

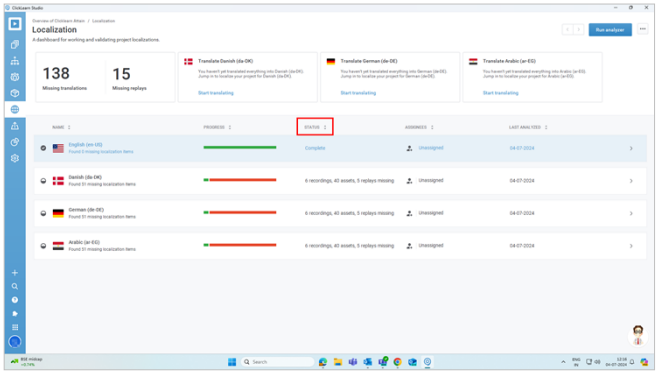
PROGRESS shows whether the localization is complete or incomplete.

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



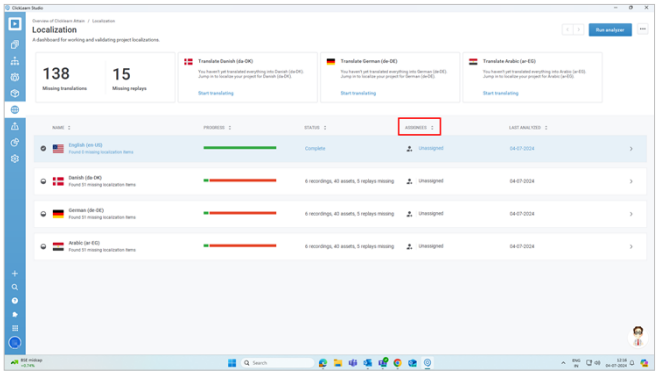
11.2.1.3.3. Status

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.



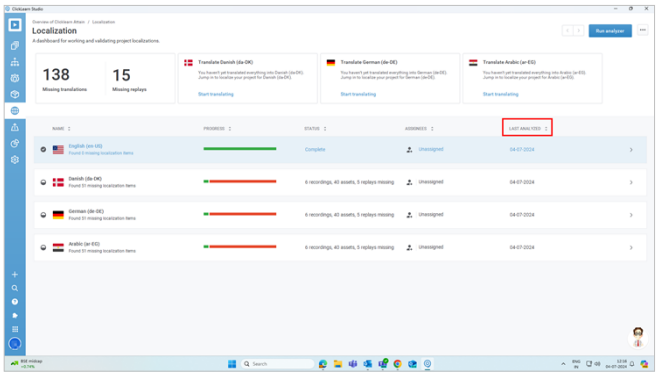
11.2.1.3.4. Assignees

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



11.2.1.3.5. Last Analyzed

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



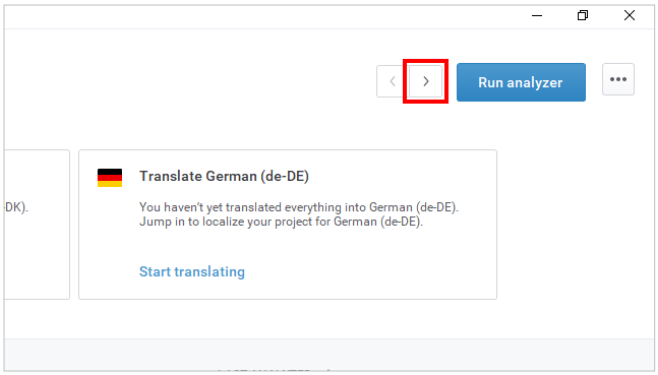
11.2.2. Top right corner of localization

Everything you need to manage languages in one corner, to scroll between languages, run the analyzer, import or export translations, and set up new languages without leaving the localization screen.

11.2.2.1. Other Elements

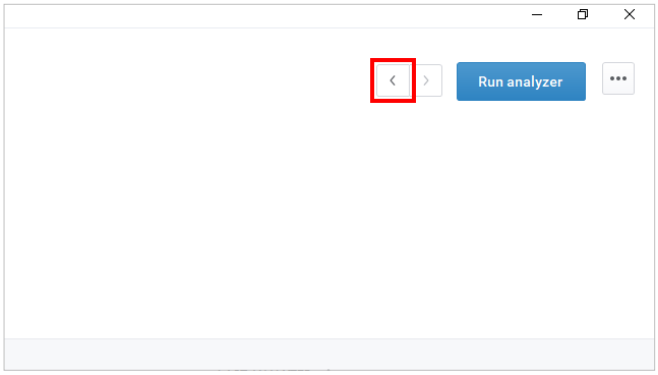
11.2.2.1.1. Right Arrow

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.



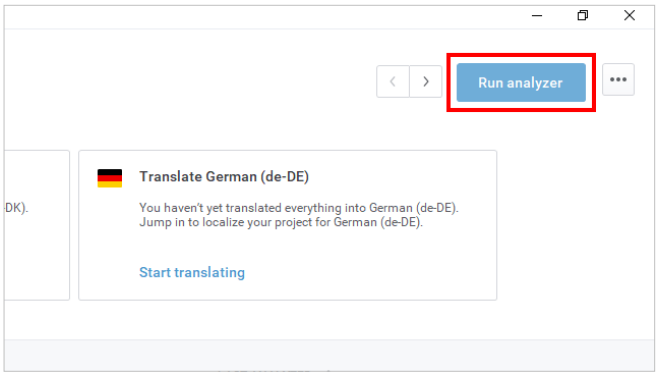
11.2.2.1.2. Left Arrow

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



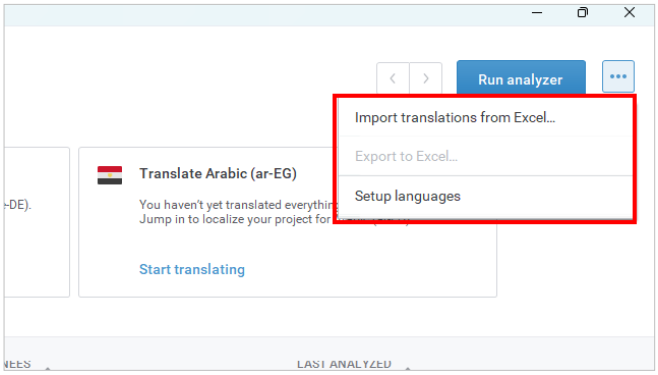
11.2.2.1.3. Run Analyzer

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



11.2.2.2. 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.

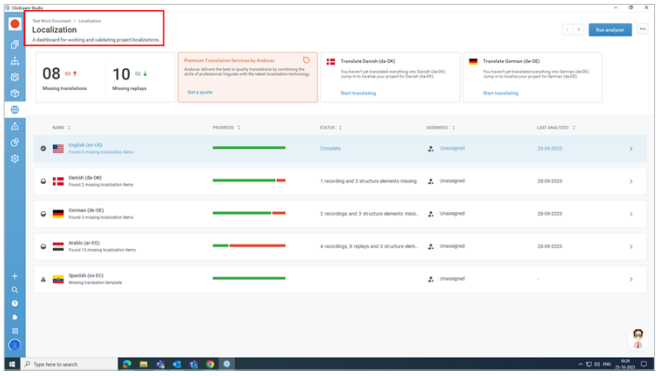
Setup languages: This option will redirect you to **Settings >> Language Settings**, where you can add languages to your project.

11.3.Translate Your Project

Everything you need to translate a project in one flow, to auto-translate recordings, localize assets, fix structure, and run replays until every language reads complete without manual rework.

11.3.1. Introduction

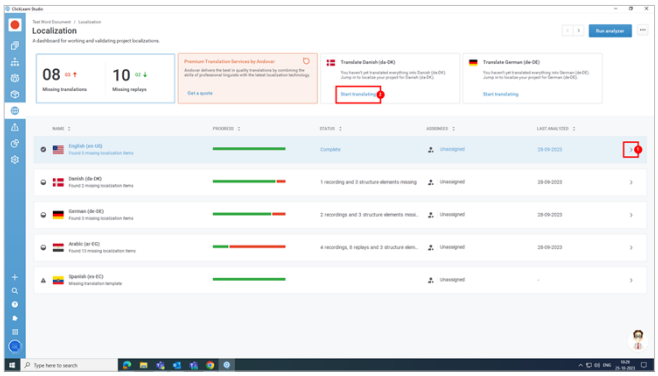
Localization: This is what a localization screen looks like. From here, you can localize your project in different languages.



11.3.1.1. Translating your project

Ways in which you can translate your project

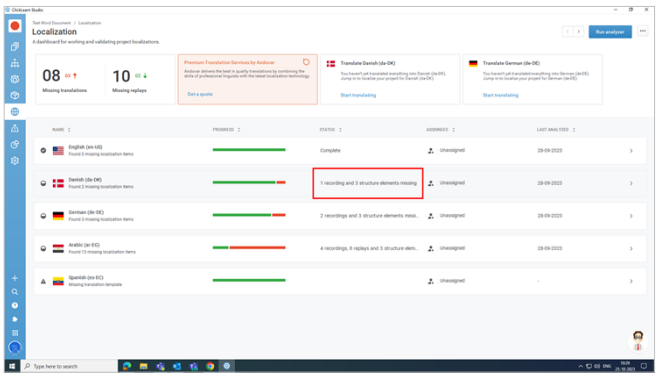
1. Click on the button **More Options** of grid cell **Action**.
2. Click on the button **Start translating**.



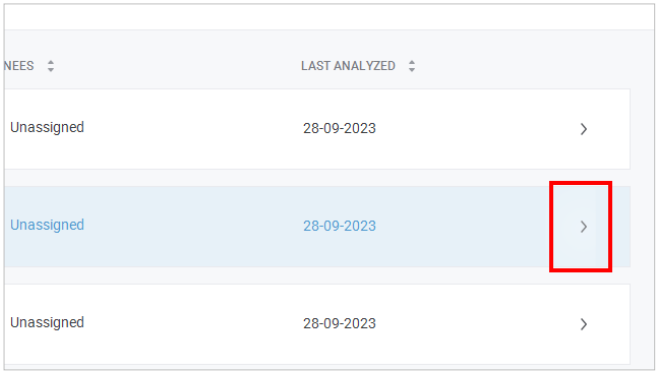
11.3.1.1.1. Steps to translate

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

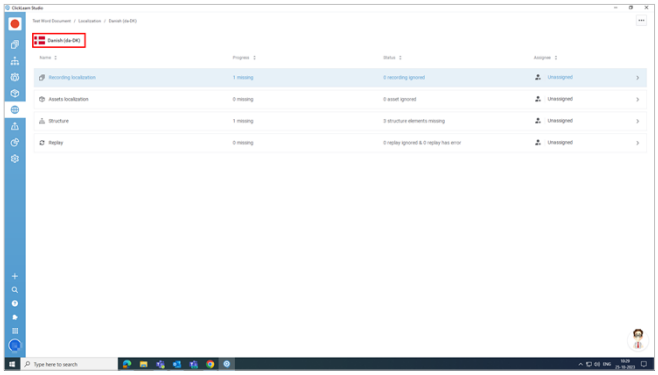
Click on the grid view cell **STATUS** with data **1 recording and 3 structure elements missing.**



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



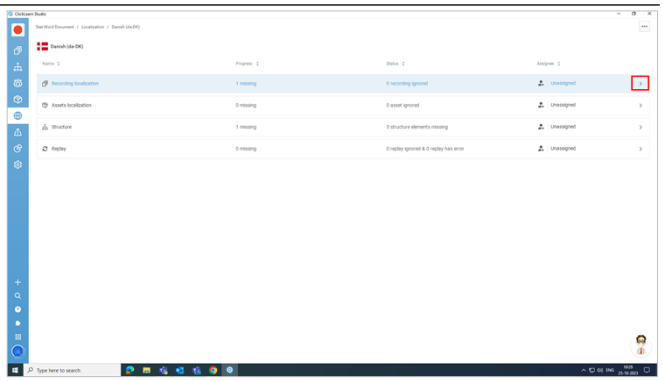
Here, we have selected the language **Danish (da-DK)**.



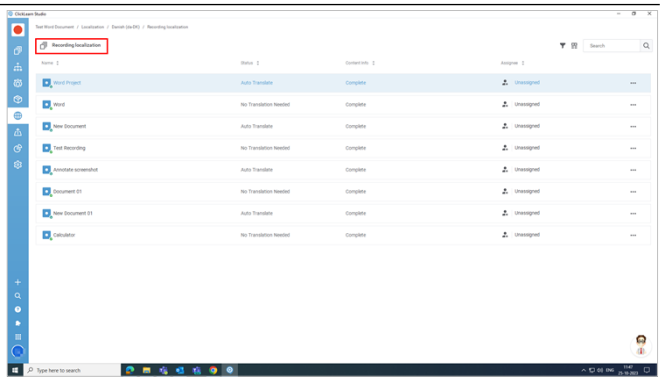
This screen displays the details about the missing elements. There are four elements associated with each language.

- **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.

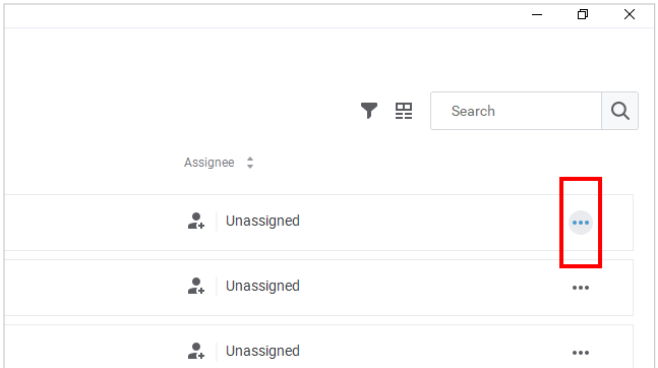
Click on the button **More Options** of the grid cell **Action**.



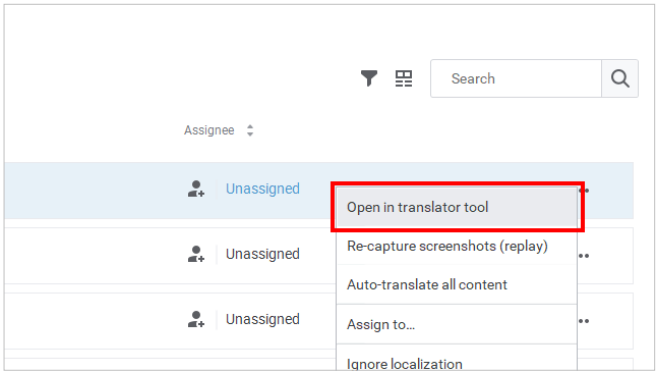
Recording localization: This displays the list of recordings. The content info shows **complete**, which implies no further translation is required for this element.



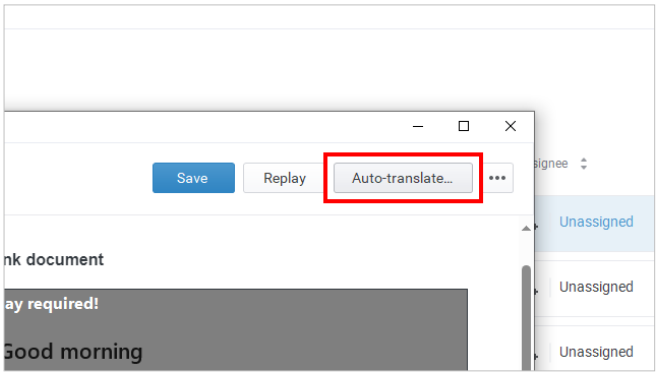
To translate your recordings, click **More Options** of grid cell **Action**.



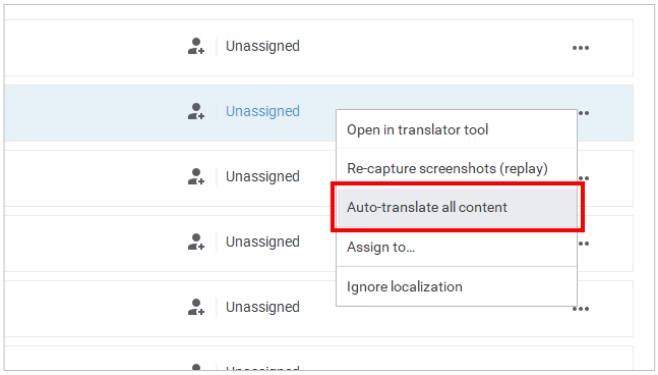
Click on the menu item **Open in translator tool**.



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

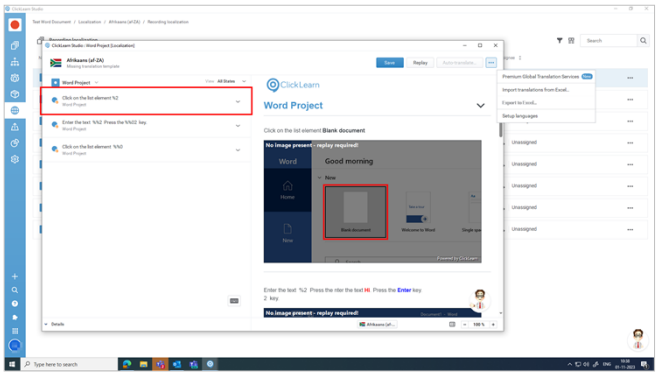


Another way in which you can auto-translate is to click on **Auto-translate all content**. This opens up a new dialog box that asks you to select the steps that must be translated. Select the steps you wish to translate and click on the Translate button. Your recordings will be auto-translated.



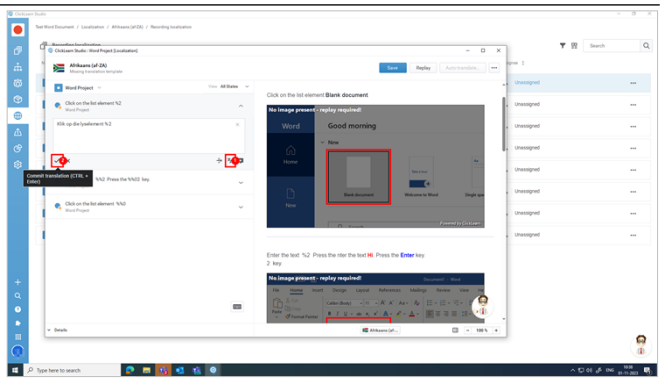
You can also translate single steps in your recording. Open the recording you wish to translate. Select the step.

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

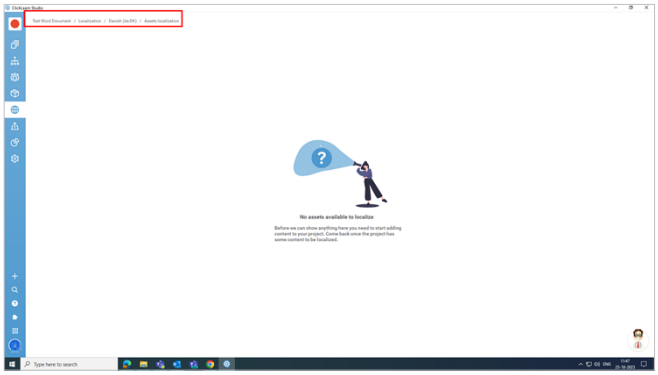


Auto-translate single step

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

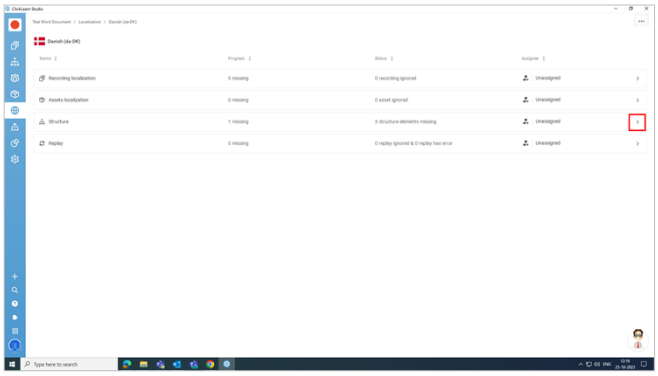


Assets Localization: You can localize the missing assets. If there are no missing assets, it displays a message no assets are available to localize.

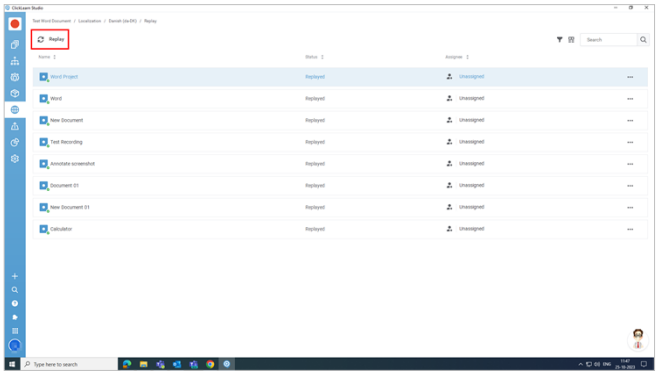


Structure: This opens up the recording, which has missing structure elements.

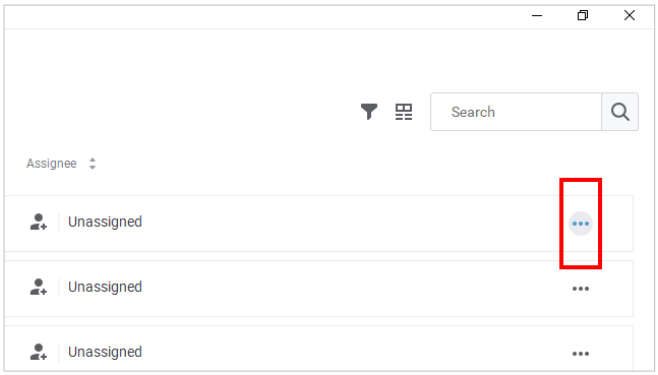
Click on the button **More Options** of grid cell **Action**.



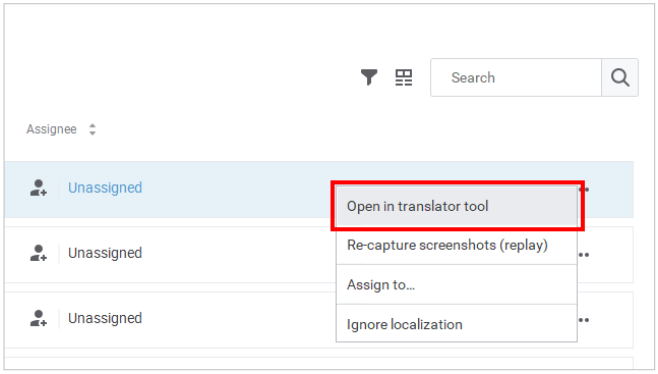
Replay: This displays the list of recordings that need to be replayed.



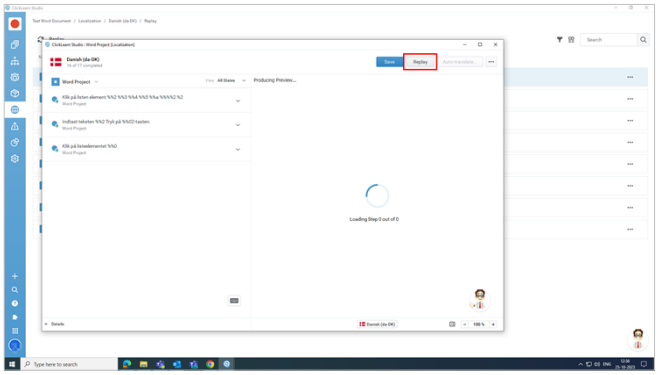
To replay a recording, click **More Options** of grid cell **Action**.



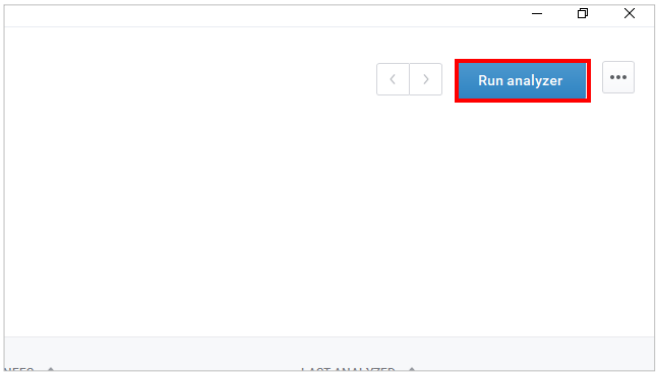
Click on the menu item **Open in translator tool**.



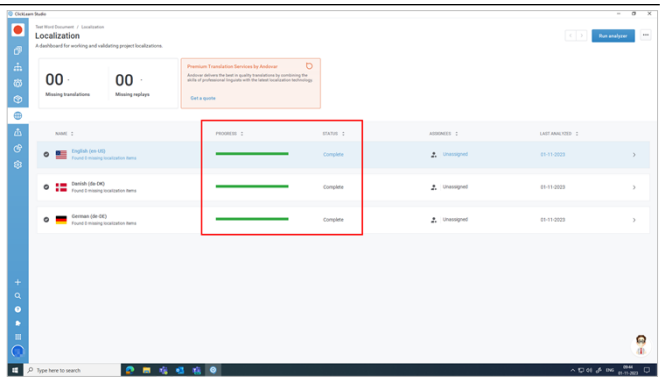
Click on the button **Replay**. It will start the replay for that particular recording.



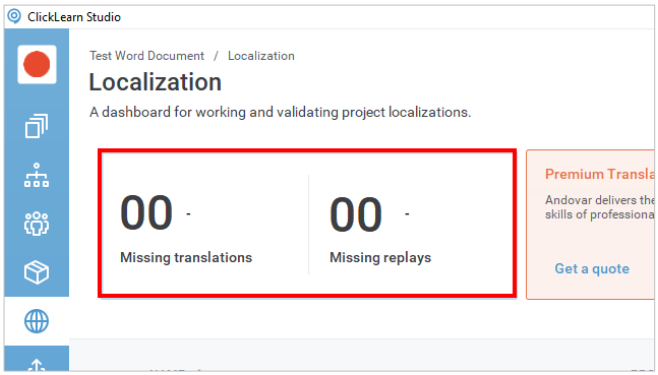
Once you localize every element, you need to run the analyzer. The **Run analyzer** button allows you to check the completeness of your localization. It works like a refresh button that updates your localization. Click on the run analyzer button.



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.



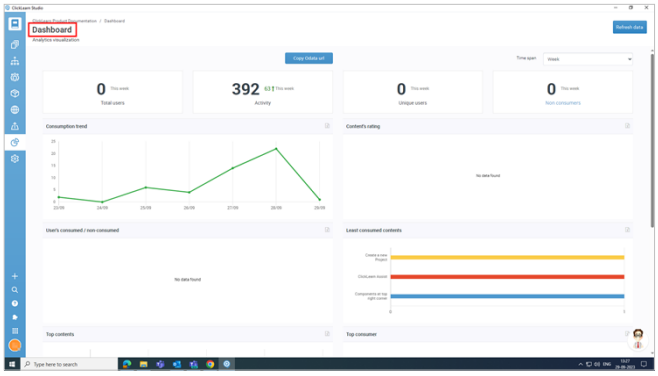
12. Dashboard

12.1. Understand the Studio Dashboard

Turn published-content data into insight, to refresh, filter by time span, copy data for Excel, and export your reports without leaving the dashboard.

12.1.1. Introduction

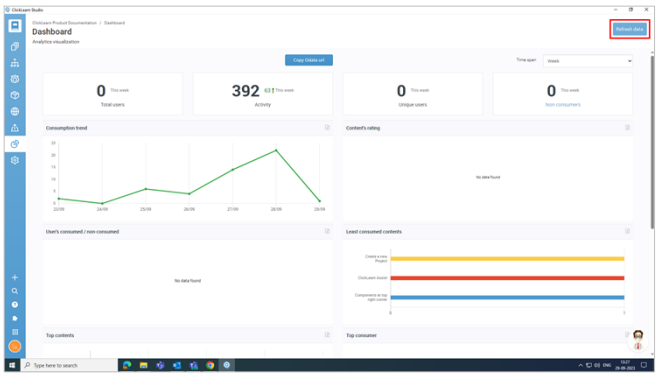
Dashboard is a feature that allows you to track and analyze the data collected from your published content. The dashboard helps you understand how users consume your content across time zones and locations and what works and doesn't.



12.1.1.1. Other Elements

12.1.1.1.1. Refresh Data

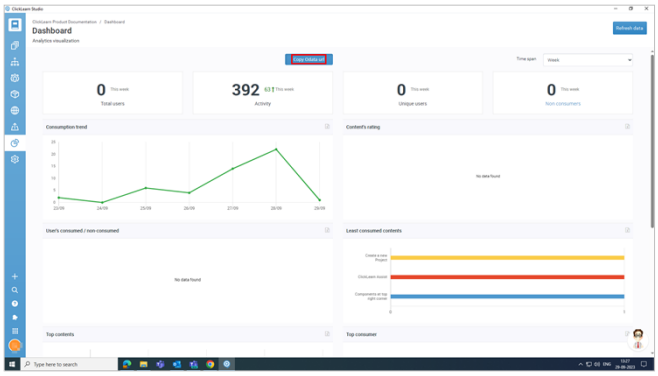
Refresh data: This will reload or update what is displayed or stored on a device.



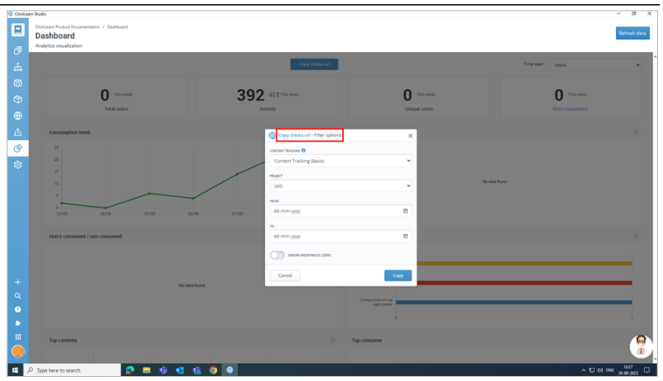
12.1.1.1.2. Copy Odata URL

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.



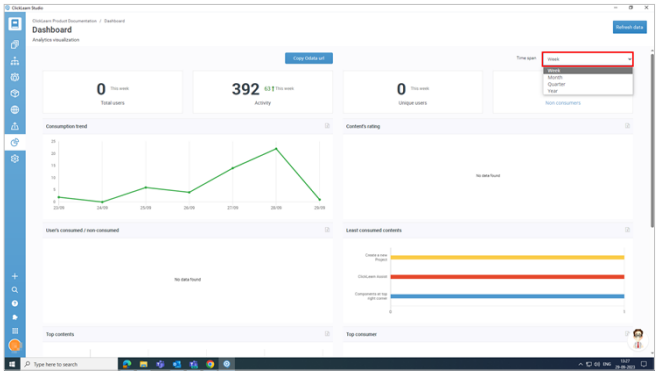
A new window, "**Copy Odata url - filter options**." You can use these filters depending on your project needs and click "**Copy**."



12.1.1.1.3. Time Span

This function offers you with four different options.

- Week
- Month
- Quarter
- Year

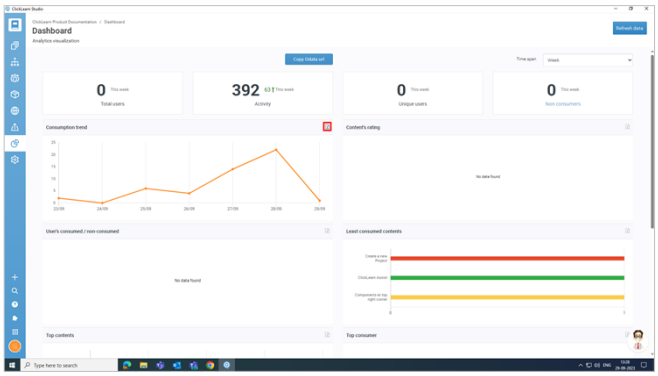


You can choose from these filters to get a weekly, monthly, quarterly, or yearly summary of total users, activity, unique users, and non-consumers.

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.

12.1.1.1.4. Export Data

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



12.2. Export Dashboard Data via OData

Full visibility into your portal's tracking data, to track, export, and report on every user action without manual data entry.

12.2.1. Introduction

12.2.1.1. Company Tracking Data

- **Tracking ID:** A unique identifier is assigned to each user action or process within the portal. It helps track activities, monitor progress, and troubleshoot issues.
- **Project Name:** The designated name for a specific project represents the training content, documentation, or materials being created or managed.
- **Username**: The unique identifier linked to the individual accessing ClickLearn. It ensures accountability and associates specific actions or changes with the respective user.
- **Login Access Method:** The method used to authenticate and access the portal, such as single sign-on (SSO), email/password login, or integration-based access.
- **Authentication Method:** The API authentication method is **oauth**. Also, we support data egress.

12.2.1.2. Actions

Users perform various key actions on the portal, each with different implications. Let's explore what these **actions** mean.

Click: When a user performs the action click, it indicates that the user has interacted with the portal in some way.

Event: When an action event is performed, it generally means a search event has occurred. After executing a search, events are typically displayed in chronological order based on the time they occurred.

Pageview: This event is recorded whenever a user accesses an HTML page within portal. It tracks the user's navigation across different pages, providing valuable data on which content users engage with the most. Pageview can help identify sections with high traffic and areas that need more visibility.

Feedback: Feedback is when a user submits feedback about a webpage or a piece of content. It is crucial to evaluate user satisfaction and identify areas for improvement.

Chapter: This event occurs when a video reaches a specific chapter, indicating the user's progress through segmented content. Chapters divide the video into logical sections, making it easier to monitor how users engage with the material. Understanding these chapter events can help identify which parts of the video are the most engaging.

ChapterJump: The event is logged when a user skips directly to a specific chapter in a video. This indicates the user's preferences for particular topics or sections of interest.

Continue: This allows the user to resume video playback after pausing it. It highlights re-engagement with the produced material and helps you provide insights into how users consume content over time and identify any patterns of interruptions.

CustomEnd: This section is also called a custom-defined endpoint, which is often used for tailored reporting. Custom end events generally provide insights into how users engage with particular sections and are used for the final report.

Final: This event is logged when the video reaches its final feedback page. At this stage, users can review their performance or leave comments.

Question: This section is triggered when a question is displayed to the user during a video. Questions assess user understanding and gather input effectively.

Answer: This captures user responses to questions shown during the video, measuring understanding and engagement to provide valuable metrics for assessing training material success.

End: This occurs when the video playback reaches its conclusion. This event signifies that the user has completed the training material. Tracking this event provides insights into user completion rates and overall engagement with the content.

Exit: This occurs when a user exists or closes the video before its completion. The event helps to identify points where users stop engaging and reveals patterns of user disengagement.

Init: This log entry is created when a video initializes and starts loading, indicating the beginning of a video training session. It shows that the user has accessed the video and is preparing to engage with the content.

Note: This occurs when a note is displayed to the user during a video session. Notes provide supplementary information or instructions, ensuring the user's understanding of the topic.

Pause: This indicates that user pauses a video during playback. This event provides insights into points where users might need breaks or find the content challangeging.

Sound: This event triggers when the user toggles sound on or off during video playback. It tracks user preferences regarding audio features.

Start: This event marks the beginning of video playback, indicating that the user has actively started engaging with the content. It helps track initial user interest in the material.

Step: This event occurs when the video reaches a specific step in a guided tutorial. It tracks the structured flow of content and user progress through designated tasks.

Scale: This happens when a user adjusts the video scale, such as zooming in or out. It provides insights into how users prefer to view the content.

Timeline: This occurs when a user skips to a different point in the video timeline. This reflects how users navigate through the content, highlighting sections of high interest.

Correct: Captures when a user successfully performs a step in a guided training session. This event validates user understanding and execution of tasks.

Wrong: Logged when a user fails to complete a step correctly during a training session. This event helps identify areas where users struggle or make mistakes.

Web Assist Start: The Web Assist event is triggered when the Web Assist functionality starts. It marks the beginning point of interactive guidance within the web application.

Web Assist End: The session for Web Assist is logged when it ends, either by successfully completing the guidance or by exiting the feature. This event provides valuable insights into how users interact with and complete the assistance process.

Web Assist Close: This happens when a user manually closes the Web Assist feature before completing the session. This event highlights user disengagement and can help pinpoint areas where the guidance may be unclear or not meeting user needs.

Web Assist Back: This occurs when the user navigates backward within the Web Assist steps. This event indicates revisiting earlier instructions, often reflecting user confusion or the need for repetition.

Web Assist Next: The user has proceeded to the next step in Web Assist. This event showcases user progression through the guidance.

Web Assist Ok: Web Assist Ok indicates that the user has successfully followed the steps within Web Assist. This showcase the effectiveness of the guidance and demonstrate user success.

Web Assist Hide: The user has minimized the Web Assist feature during a session. It suggests temporary disengagement, often indicating a need for multitasking or exploration beyond conventional guidance.

Web Assist Wait: The current Web Assist step is waiting or unable to locate the expected element in the web application. This may arise due to potential application structure issues or guidance logic issues.

Web Assist Question: This means a question for Web Assist is shown. This event engages users interactively, prompting them to reflect or provide input.

Web Assist Answer: The user provides answers to the Web Assist questions. This event helps assess comprehension and engagement levels during the interactive session.

12.2.1.2.1. Windows Assist

Assist Start: This event functions similarly to the Web Assist start, but it's specific to Windows. This event signifies the introduction of guided assistance within a Windows application.

Assist End: When a Windows Assist session concludes by completion or user exit. This provides data on session completion rates, helping evaluate the overall effectiveness of the assistance provided.

Assist Close: This is triggered when a user closes the Windows Assist feature before completing the guidance. It highlights early exits and helps identify areas where users may be struggling or losing interest.

Assist Back: This occurs when the user navigates backward within the Windows Assist steps. This circumstance often reflects user confusion or the need to review prior instructions.

Assist Next: Assist Next is performed when a user moves to the next step in Windows Assist guidance.

Assist Ok: This occurs when the user successfully completes a step in Windows Assist. This action indicates that the instructions are clear and actionable.

Assist Hide: This means when the user minimizes the Windows Assist feature. This event indicates temporary

disengagement and can provide insights into how users interact with multitasking during the guidance process.

Assist Wait: Logged when the current step in Windows Assist is waiting or unable to find the target element within the application.

Assist Question: This occurs when a question is displayed during a Windows Assist session.

Assist Answer: Triggered when a user responds to a question within Windows Assist.

Video Complete: This event is logged when the user successfully completes all steps within the ShowMe, TryMe, or TestMe modes.

Video End: This occurs when the user exits or closes a video before completing it in ShowMe, TryMe, or TestMe modes.

12.2.1.3. intValue1

For all these actions, value is **produced step ID**.

The produced step ID is a unique identifier that applies to all stages and interactions within the process.

- Chapter
- Chapter Jump
- Continue
- Note
- Pause
- Step
- Correct
- Wrong
- Question
- Answer

Exit: If the exit action is triggered, this means the user exists, and the Test Me video is displayed.

Init: When the user executes the init action, the system will display one of the following options.

- 0 = **Show Me**
- 1 = **Try Me**
- 2 = **Test Me**

Sound: When the action item is sound, it will display any of the following.

- **0** = Off (sound is disabled)
- **1** = On (sound is enabled)

Timeline: This displays the current produced step ID. This means when a user jumps to a specific point on the video timeline.

Video Complete: This action is triggered when the user completes all the steps in the video. It will display one of the following options.

- **0** = Show Me
- **1** = Try Me
- **2** = Test Me

Video end: If the action is video end, this means when the video or training session ends, or the user exits prematurely. It displays any one of the following values.

- **0** = Show me
- **1** = Try me
- **2** = Test me

12.2.1.4. intValue2

Exit: When the action item is exit, it shows the incorrect count for the Test Me video. The Exit action occurs

when the user completes a test or video.

Feedback: The feedback action allows users to rate their experience on a scale of 0 to 5, where 0 indicates no rating was provided. This helps gather feedback about the content or interaction. It reflects the user's assigned rating.

Timeline : This displays the current produced step ID. The Timeline action uses the produced step ID to jump to specific stages or points in the content.

Final: This rating is provided by the end user, where 0 indicates no rating has been given, and higher values reflect varying levels of user satisfaction.

Scale: The Scale action defines the type of user interaction or feedback. A value of 0 represents a pan type of interaction, while 1 indicates a scale interaction.

- **0** = pan
- **1** = scale

12.2.1.5. TxtValue3

- **Chapter**

Chapter Jump

- The value of the above actions is the localized chapter, which refers to a version of the chapter that has been tailored or translated to match the user's preferred language or regional settings.

- **Continue**
- **Note**
- **Pause**
- **Step**
- **Web Assist Start**
- **Web Assist Close**
- **Web Assist Back**
- **Web Assist Next**
- **Web Assist Ok**
- **Web Assist Hide**
- **Web Assist Wait**

The value for all the above actions is the localized HTML formatted step text, which may be null. This value is used consistently across each action to provide step-specific instructions or content. If no specific instructions are provided, the value may be null.

Exit: The Exit action is triggered when the user finishes a Test Me video. Upon completion, the system generates and displays a JSON report summarizing the user's responses, performance, or any other relevant data associated with the interaction.

Init: The Init action is responsible for initializing the video and setting various video parameters, such as resolution, playback speed, and other configurations.

12.2.1.5.1. Values triggered by Click actions for the following activities.

- **SBS**: Clicking on SBS triggers the display of instructions for the user, guiding them through the process or interaction.

- **Docx:** Clicking on **Docx** starts the download of a Word Document (typically a .docx file), providing users access to additional content or resources in Word format.

- **Pptx**: Clicking on Pptx starts the download of a Powerpoint presentation (.pptx).

- **PDF**: Clicking on PDF triggers the download of a PDF document, providing the user with the content in a universally accessible format for offline viewing or printing.

- **JSV**: Clicking on jsv allows users to view a video.

Event: Clicking on Event might capture and display the HTML formatted search word, which could be part of a search feature within the system, showing the term or phrase the user selected for searching.

Page view: When the Page view action occurs, the value is always set to sbs.

- **Feedback**
- **Final**

These actions allows the user to submit their final comment or feedback. This comment provides insights into the user's experience or thoughts after completing a task, test, or interaction.

Question: The question definition
QuestionTypeCLQuestionTextCLAnswerTextCLAnswerTags

The Question action includes a detailed breakdown of the question presented to the user, including its type (e.g., multiple choice, true/false), the text of the question itself, possible answers, and any tags associated with the answers for categorization or metadata.

Answer: The Answer action captures and displays the tag associated with the user's selected answer. This tag could represent a specific category or classification relevant to the answer provided, allowing the system to track or analyze the response.

Video Complete: If it's a try-me video, it displays a summary of the user's steps in JSON format.

Book ID: The Book ID is a unique identifier assigned to each book in the system. This value allows the system to distinctly recognize and track each book within the portal.

Book Name: This is the title or name of the book. If the value is null, it indicates that the user clicked into an area within the portal where the book name is not specifically associated or relevant.

Recording ID: This is a unique identifier for a specific recording. It helps track and reference the exact recording being interacted with.

LCID: Language code according to Microsoft's LCID specification. LCID (Locale Identifier) is a code used to represent a particular language or locale, helping to manage translations and regional settings for content. It adheres to the official Microsoft specification for identifying languages and locales.

Latitude: The Latitude value is derived from the user's geographical location using their IP address.

Longitude: Longitude is also calculated from the user's IP address.

User: The User value represents the identity of the individual interacting with the content. It is only populated when the content is private, and the user must authenticate or sign in to access it.

12.2.1.6. TxtValue1

Video End: When the Video End action is triggered, the system records and displays the steps that the user has performed throughout the video.

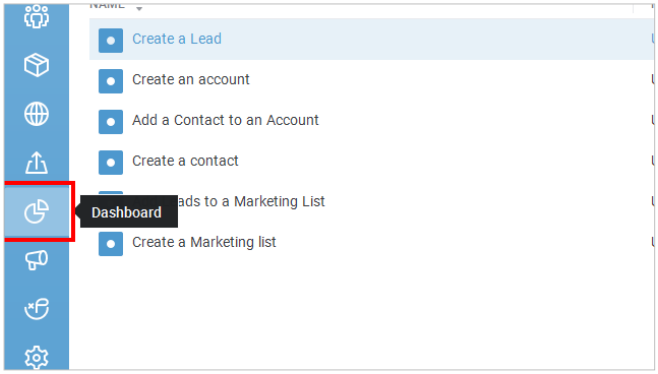
Video Complete: The Video Complete action captures the list of steps performed by the user, but it specifically refers to actions taken during the video's completion.

12.3.Understand the UXP Dashboard

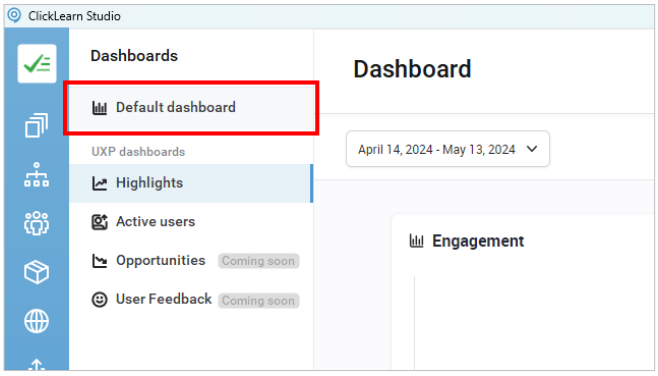
A full read on how users engage with your content, to track engagement, users, searches, AI conversations, and top content without piecing the data together yourself.

12.3.1. User Experience Panel Dashboard

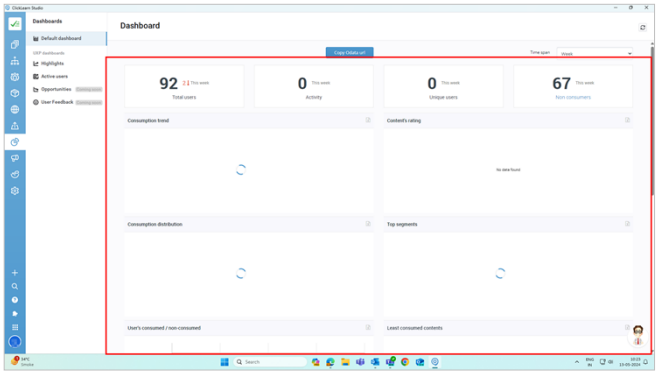
Click on the button **Dashboard**.



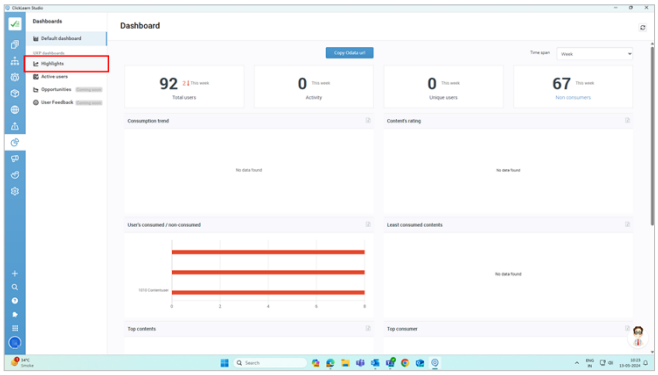
Click on the button **Default dashboard**.



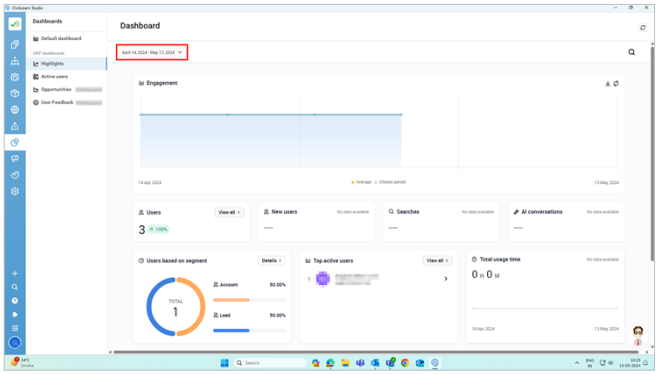
This displays the project's default dashboard.



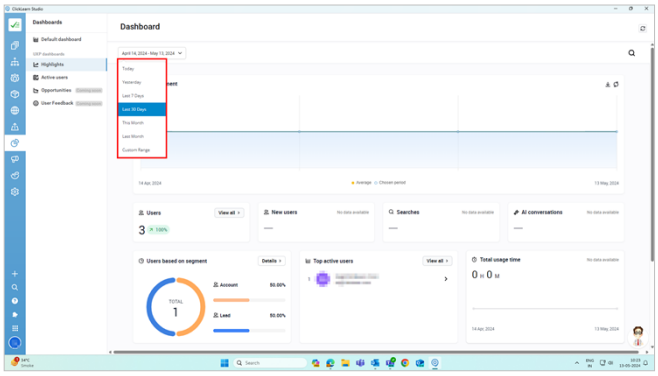
Click on the button **Highlights**.



Date Range: To view statistics, click on the group and select a specific day, month, or range of dates.
Please note: The data with the selected number of previous days will be picked for comparison.

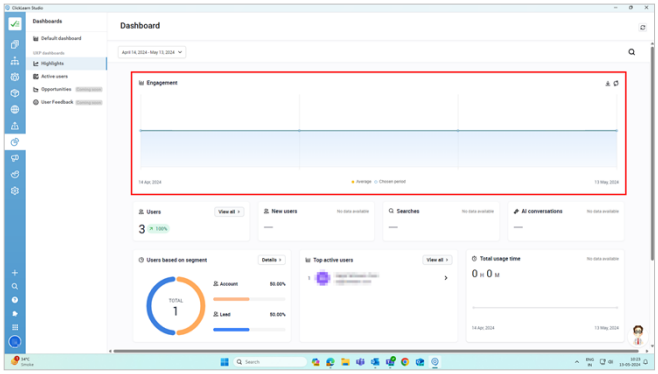


You can choose from the drop-down menu that aligns with your requirements.

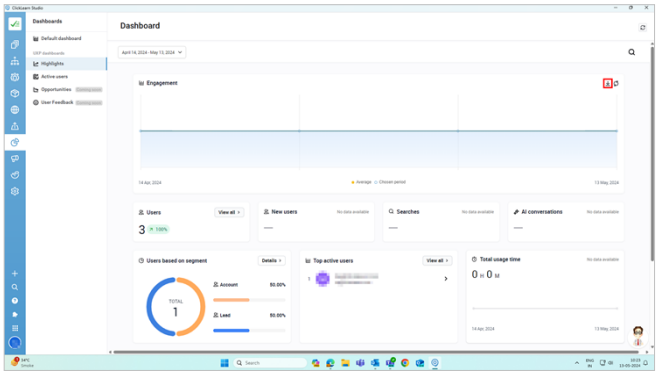


12.3.1.1. Engagement

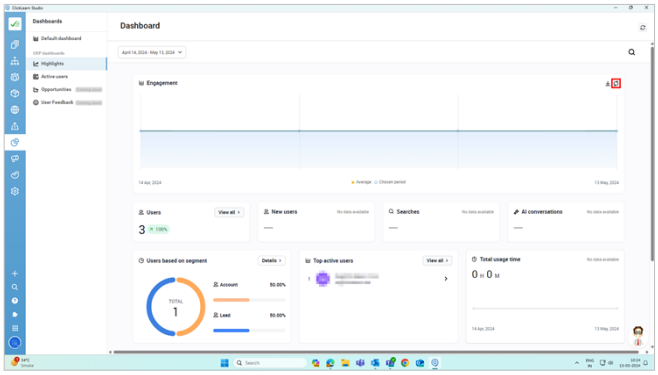
Engagement: This shows the project's engagement ratio.



Download: To download the engagement statistics, click the download button.

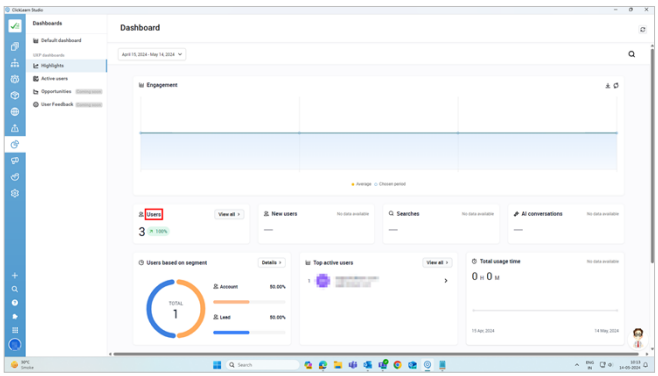


Refresh: This refreshes the engagement statistics.

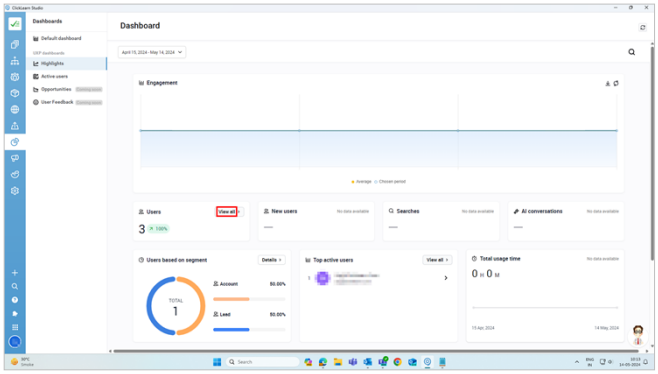


12.3.1.2. Users

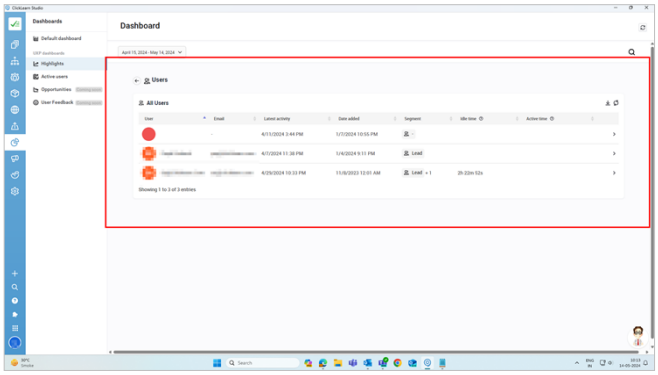
Users: This displays the list of users linked to that particular project.



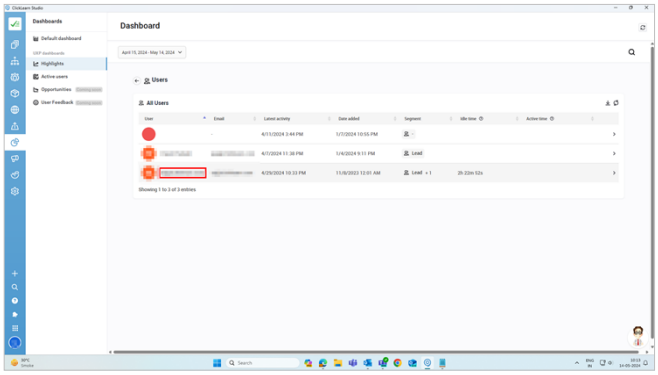
Click on the button **View all** to view all the users associated with that particular project.



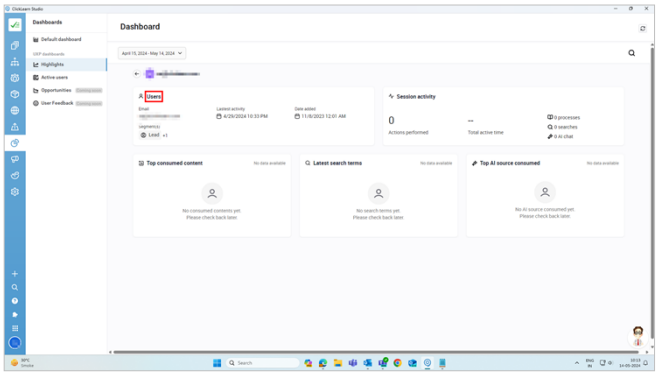
This displays the user details like the latest activity, date added, active time, etc.



Click on the username.

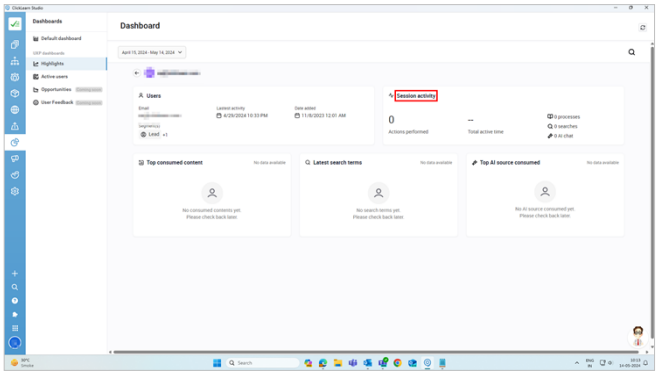


Users: This displays the details like email ID, latest activity, date added, and segments.



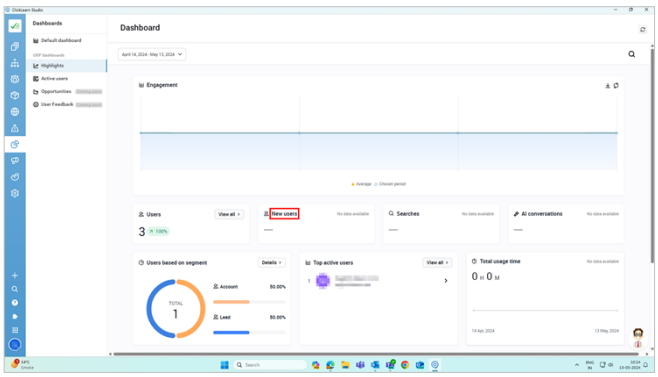
Session activity: This displays the details like actions performed, total active time, processes, searches, and AI Chat.

It also displays the top consumed content, the latest search terms, and the top AI source consumed.



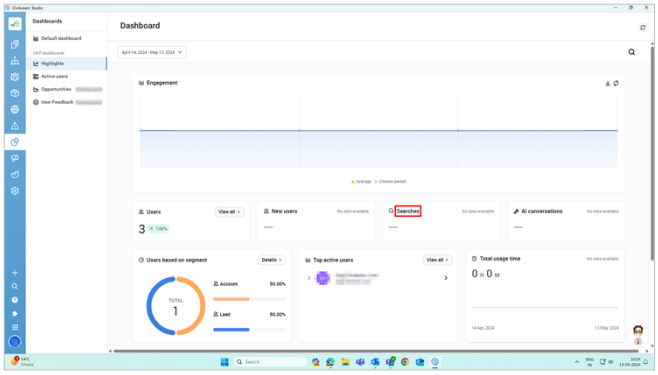
12.3.1.3. New Users

New users: This displays new users for that particular project.



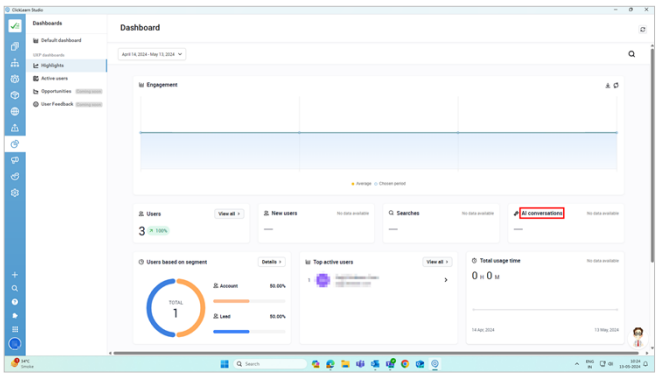
12.3.1.4. Searches

Searches: You can search for a particular user using the search feature.



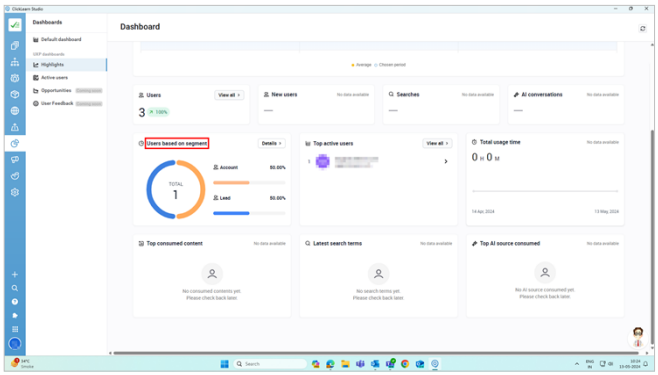
12.3.1.5. AI Conversations

AI conversations: This displays the AI conversations with that particular project.

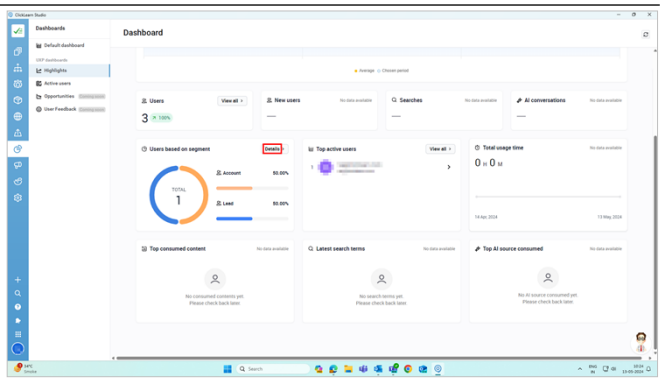


12.3.1.6. Users based on segment

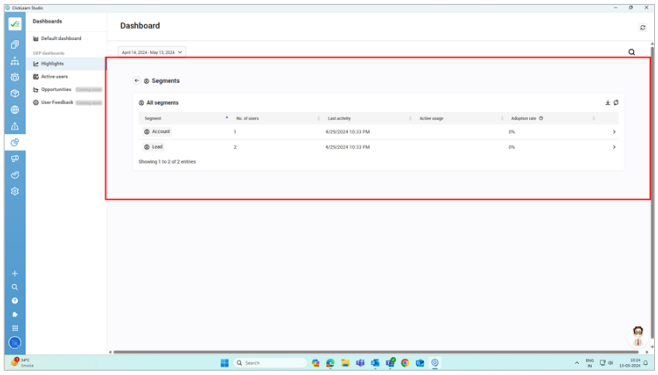
Users based on segment: This displays the virtual representation of the users based on segments.



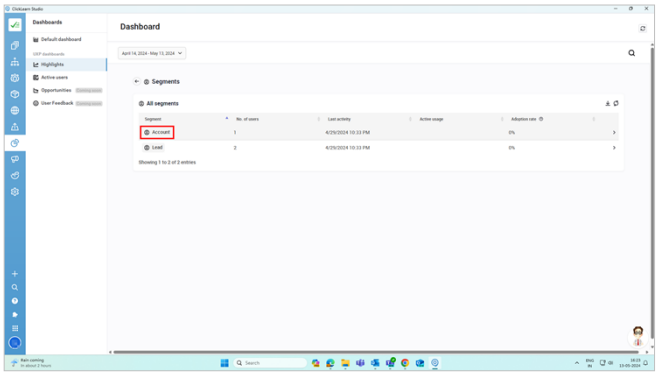
Click on **Details**.



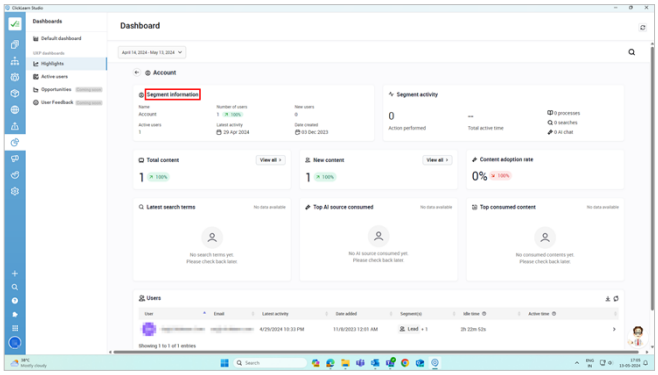
The interface presents the compilation of segments linked to the specified project.



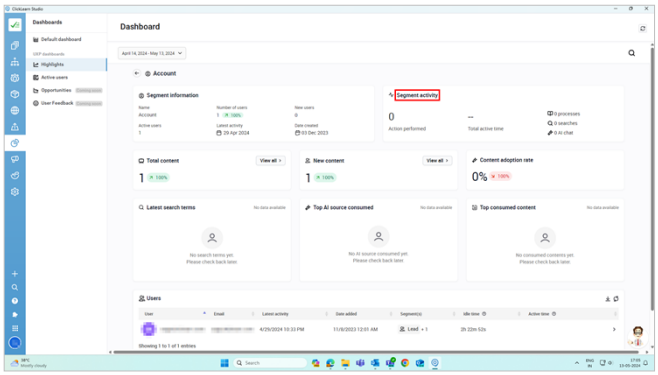
Click on the item **Account**.



Segment information: This displays the details like name, active users, number of users, latest activity, new users, and date created.

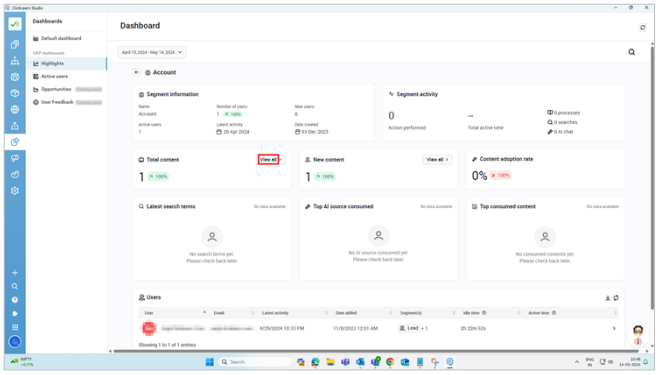


Segment activity: This displays details like Action time, total active time, processes, searches, and AI Chat.

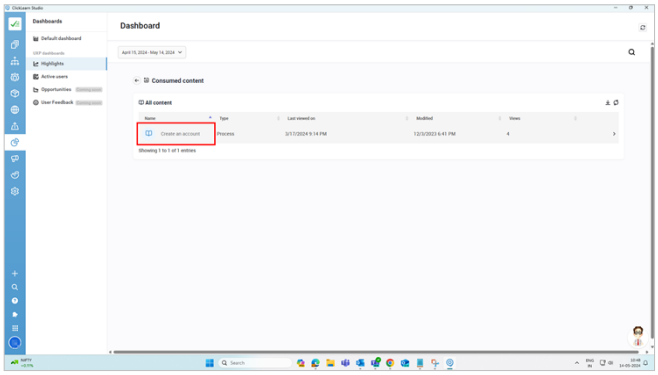


12.3.1.7. Total content

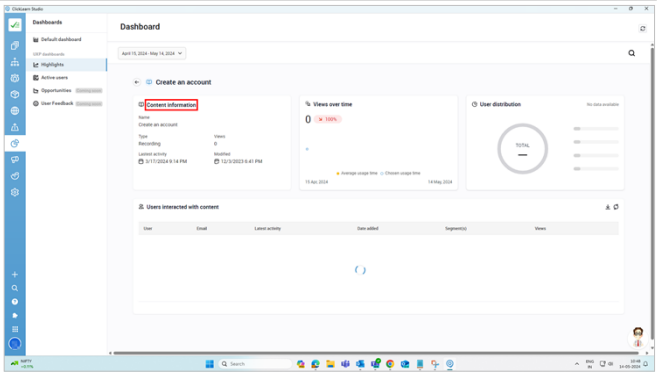
Total Content: Click on **View all**.



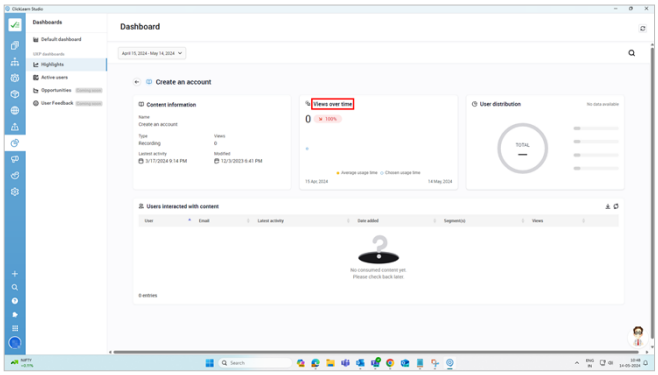
Click on **Create an account**.



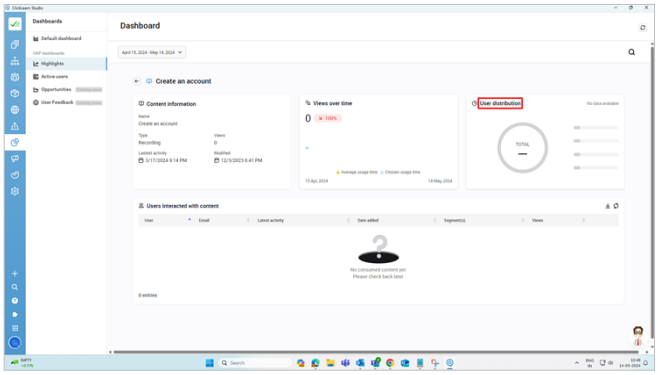
Content information: This displays the recording's name, type, views, latest activity, modified, etc.



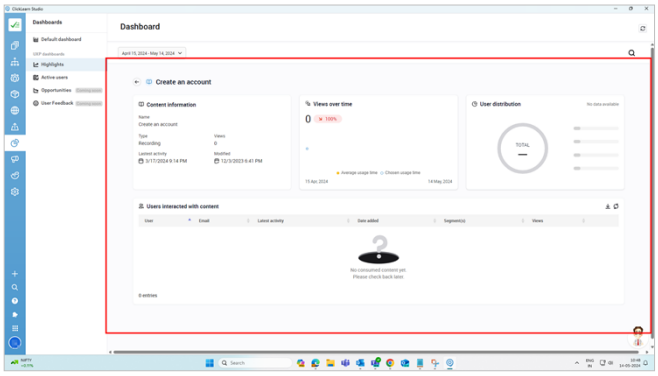
Views over time: This displays the user views.



User distribution: This displays the user distribution of the content.

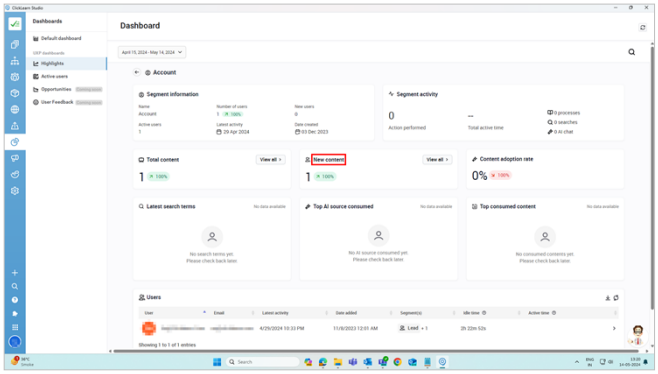


Users interacted with the content: This displays the list of users who have interacted with the content.

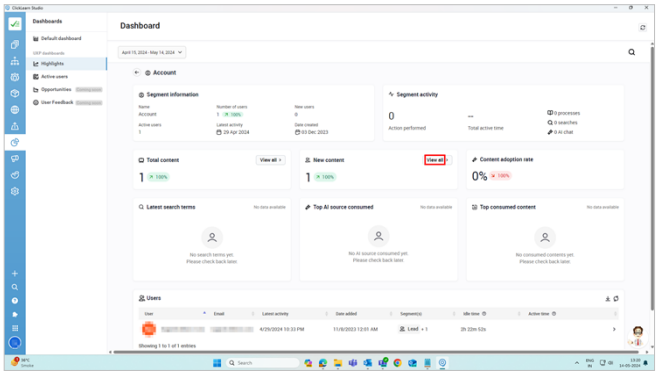


12.3.1.8. New content

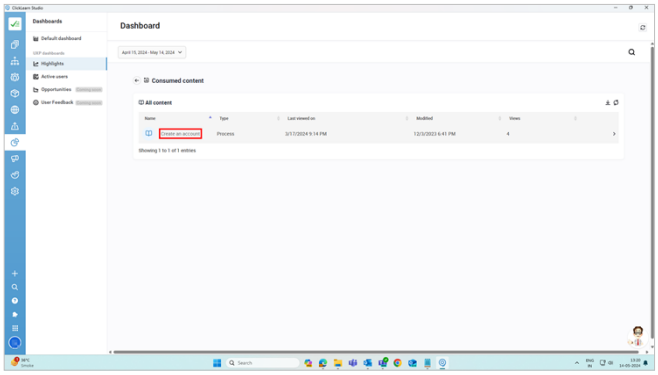
New content: This displays the latest content associated with that particular project.



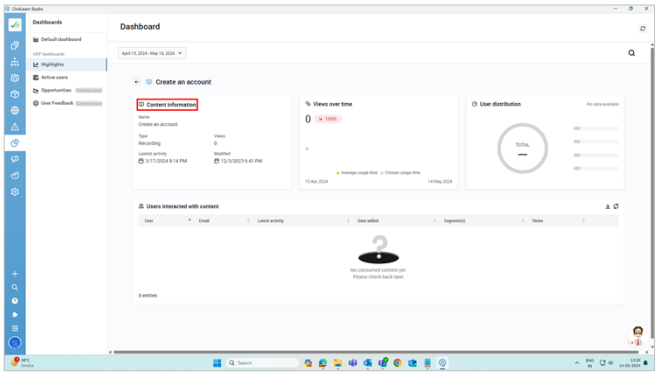
Click on **View all**.



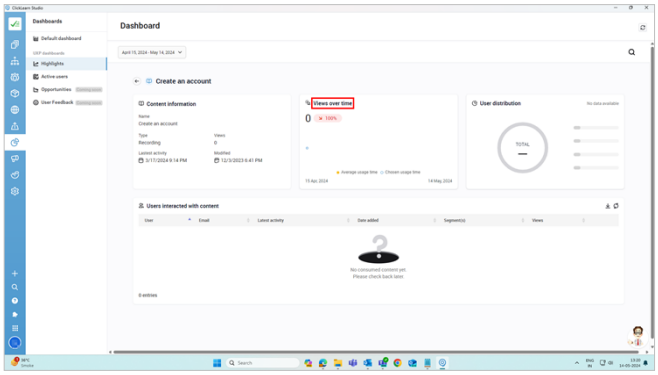
Click on **Create an account**.



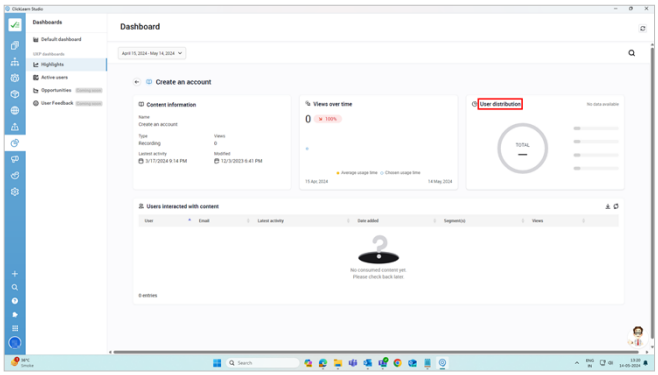
Content information: This displays the recording's name, type, views, latest activity, modified, etc.



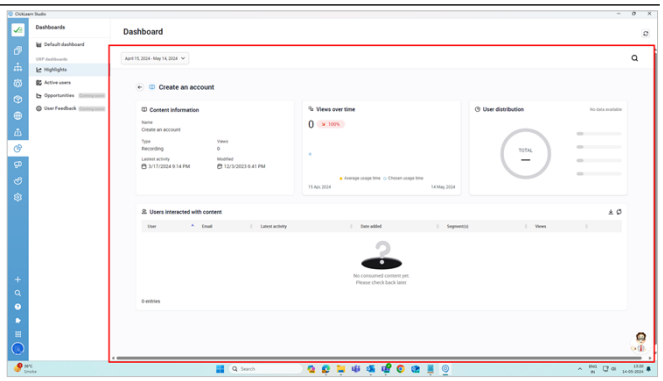
Views over time: This displays the user views.



User distribution: This displays the user distribution of the content.

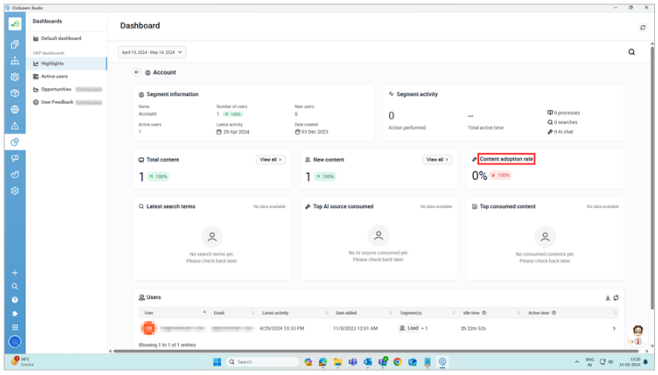


Users interacted with the content: This displays the list of users who have interacted with the content.



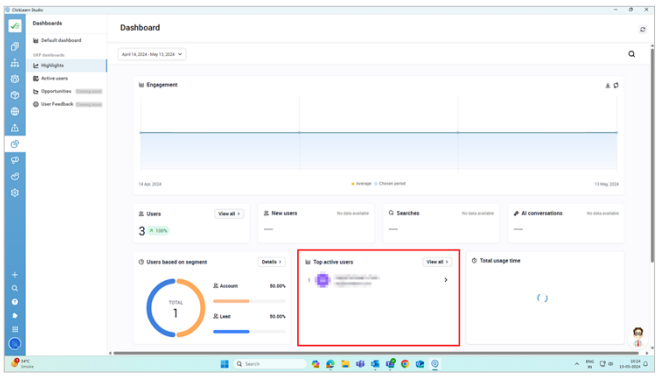
12.3.1.9. Content adoption rate

Content adoption rate: The content adoption rate refers to the percentage of users actively engaging with the content provided by the platform.

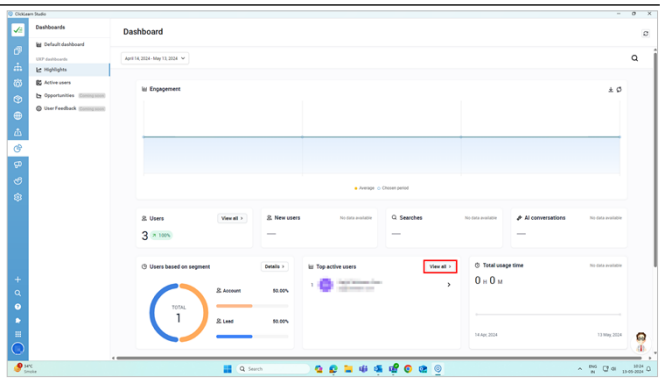


12.3.1.10. Top active users

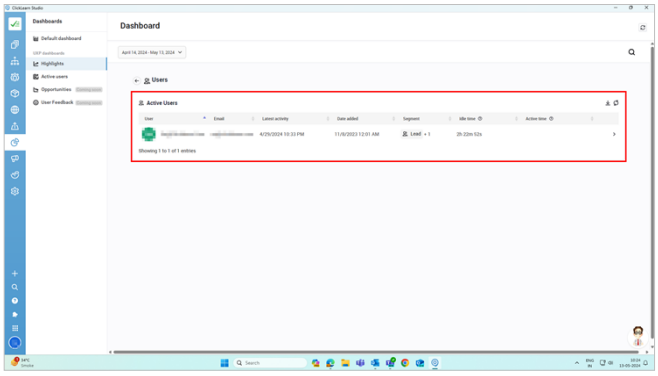
Top active users: This displays the list of top active users for that particular project.



Click on the link: **View all**.

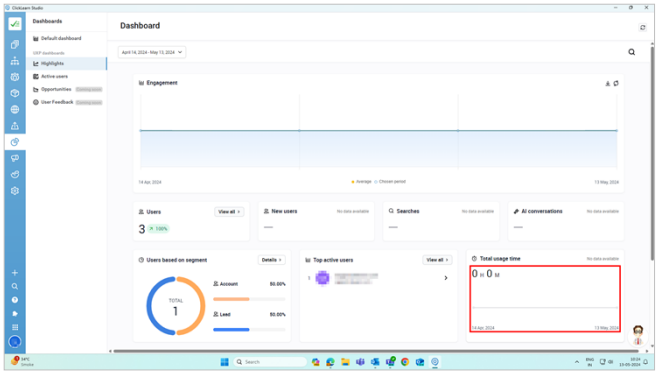


This displays the list of **Active Users**.



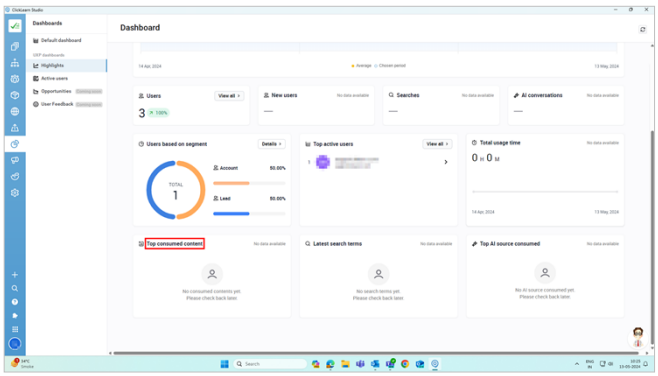
12.3.1.11. Total usage time

This displays the **Total usage time** the user spent on that particular project.



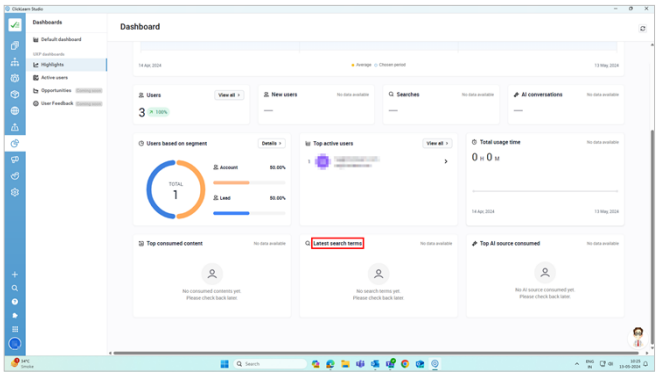
12.3.1.12. Top consumed content

Top consumed content: This displays the top consumed content.



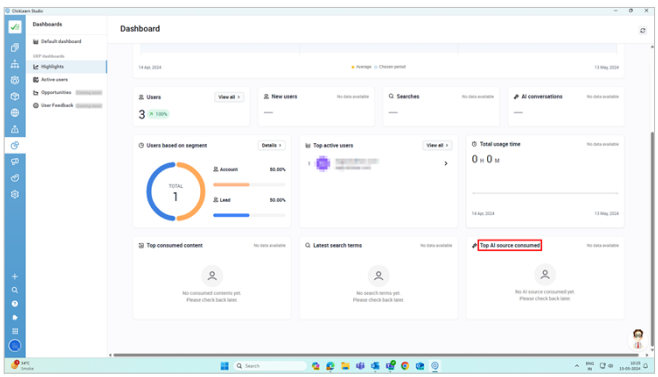
12.3.1.13. Latest search terms

Latest search terms: This shows the newest search terms the end user uses.



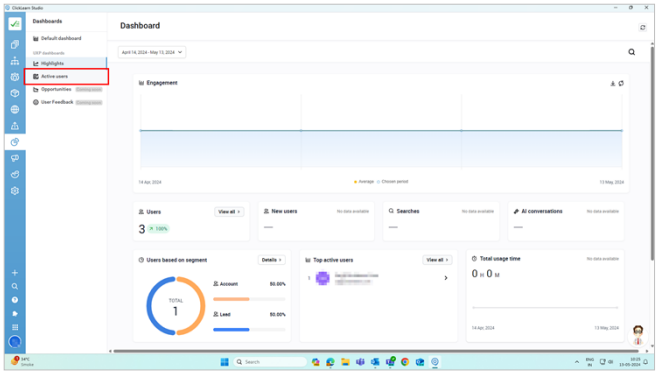
12.3.1.14. Top AI source consumed

Top AI source consumed: This displays the top AI source consumed.

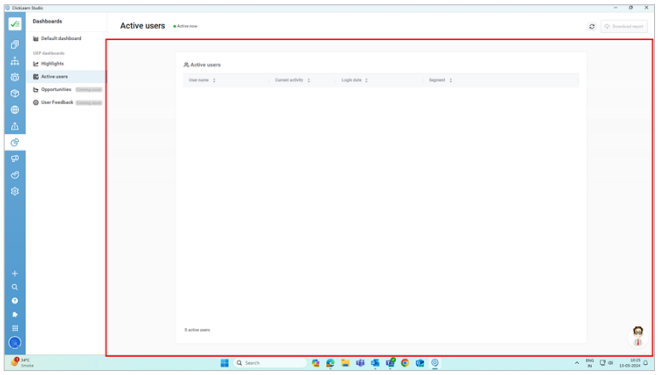


12.3.1.15. Active users

Click on the button **Active users**.



This displays the list of active users within that particular project.



13. Publishing

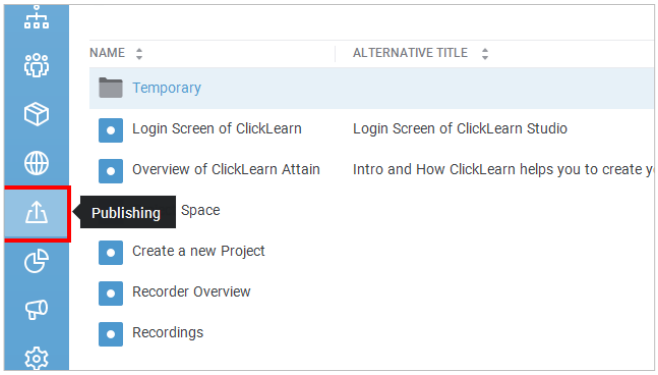
13.1.How Publishing Works

One place to publish and manage your content, to re-produce projects, copy share links, view your output, and check version details without extra steps.

13.1.1. Introduction

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

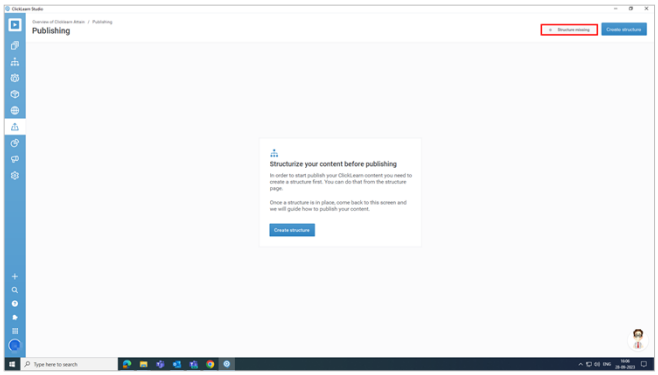
Click on the button **Publishing**.



13.1.2. For New Users

13.1.2.1. Structure missing

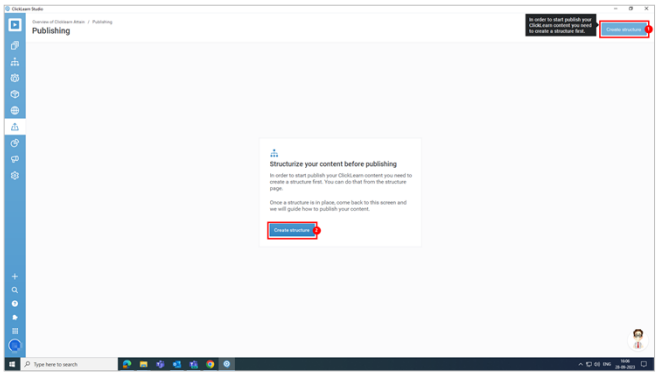
The screen of ClickLearn Attain looks something like this for **new** users.



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

13.1.2.2. Create Structure

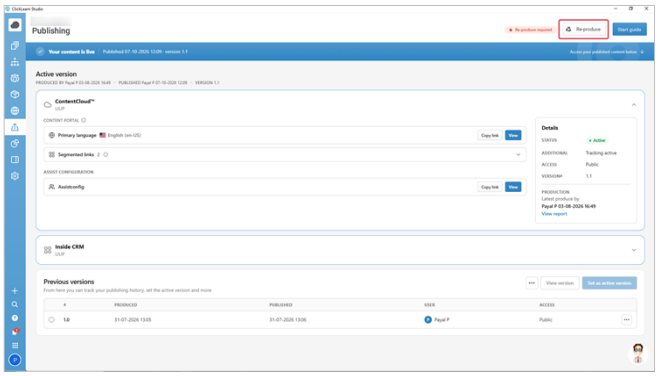
To Create Structure



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.

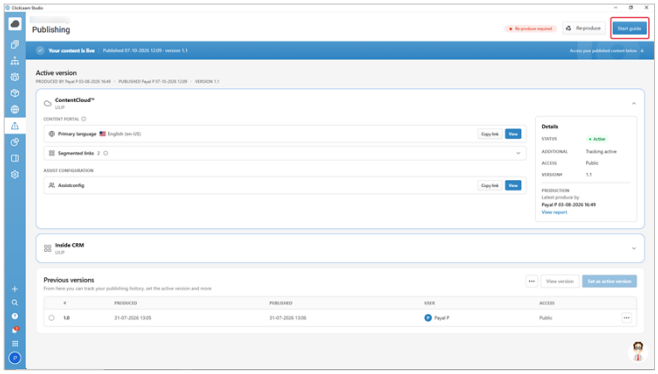
13.1.3. For Existing Users

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

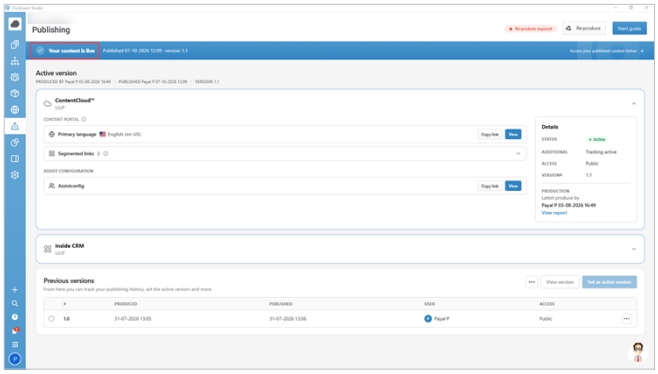


Re-produce: This will re-produce content with existing deployment options, languages, and tracking settings, or you can modify it as per your need before producing.

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



13.1.4. 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.

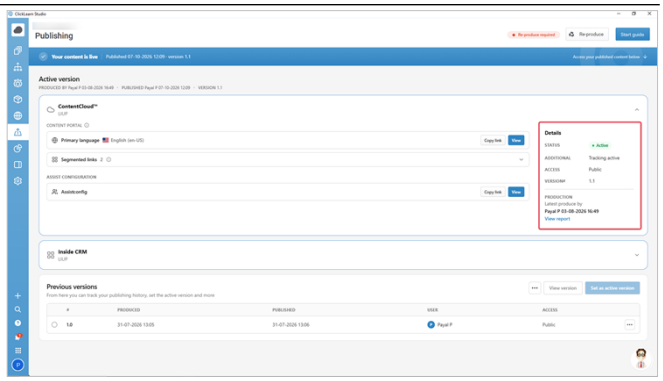
Published: This reflects the date and time of the project posted.

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.

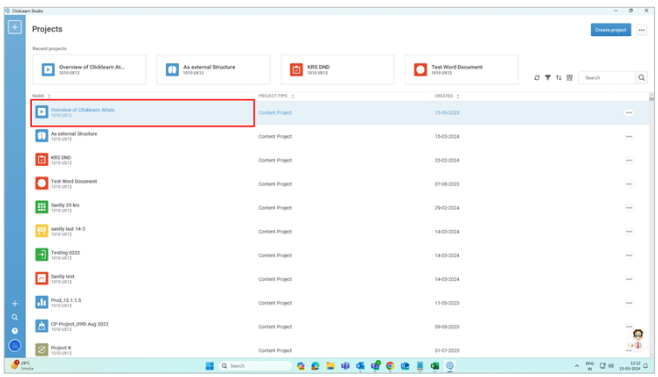
Version: The version of the project.

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.

13.2. Publish Your Project

A guided path from project to live portal, to produce, publish, and share your content with end users without a single misstep.

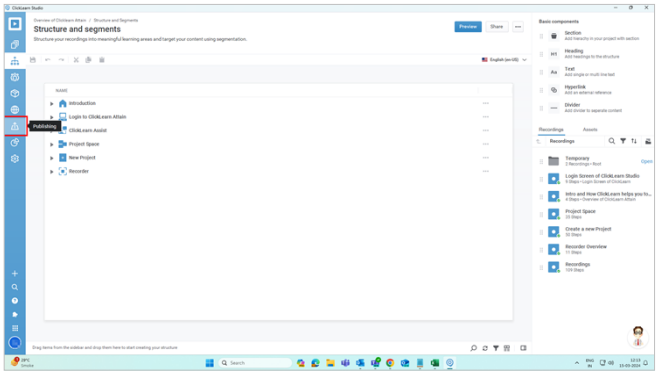


Select the project you wish to produce and publish.

Double-click on the grid cell **NAME** with the value **Overview of Clicklearn Attain**.

NOTE: Ensure you align the structure of your recordings before you start producing and publishing your content.

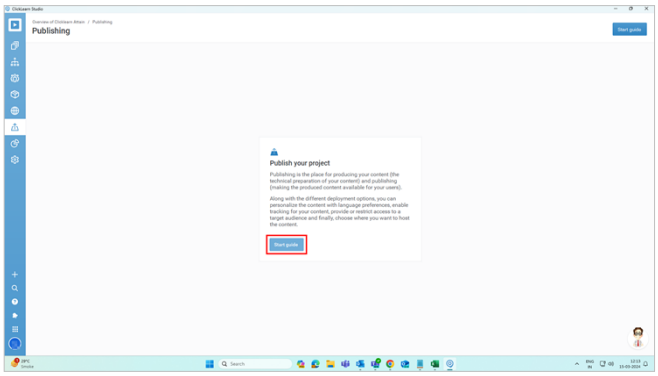
Click on the button **Publishing**.



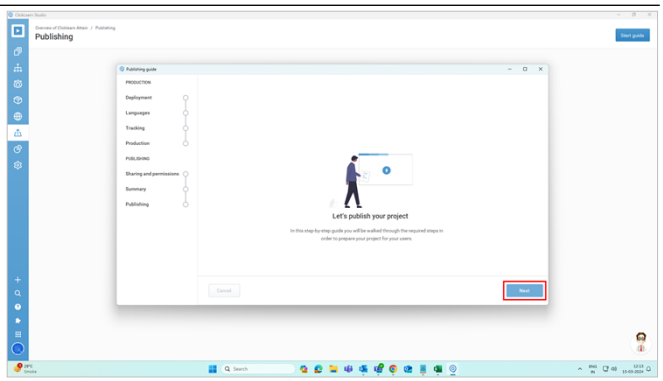
13.2.1. Publish

Publish your project: To make your content available to the end users, you need to produce and publish your project.

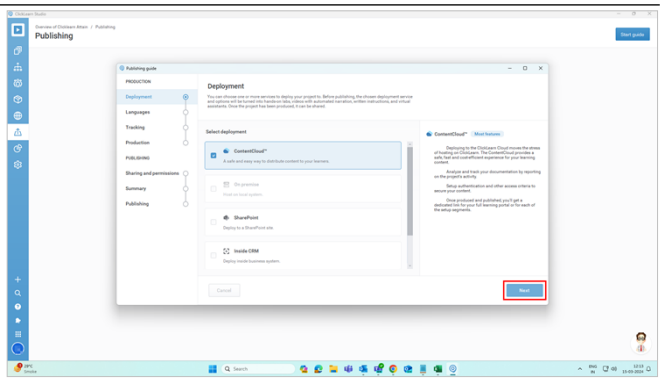
Click on the **Start guide** button.



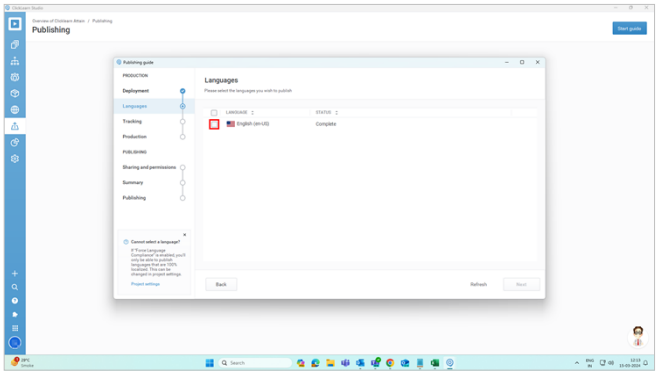
Click on the button **Next**.



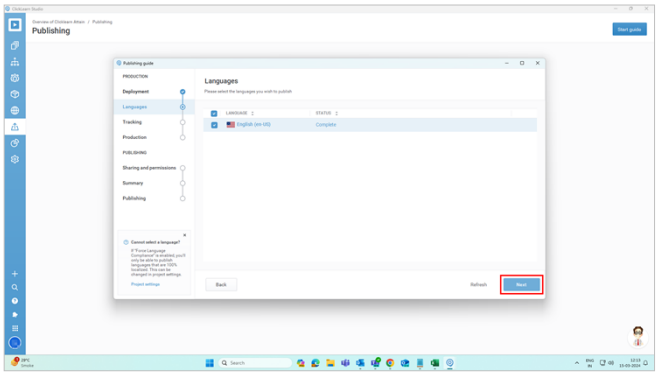
Click on the button **Next**.



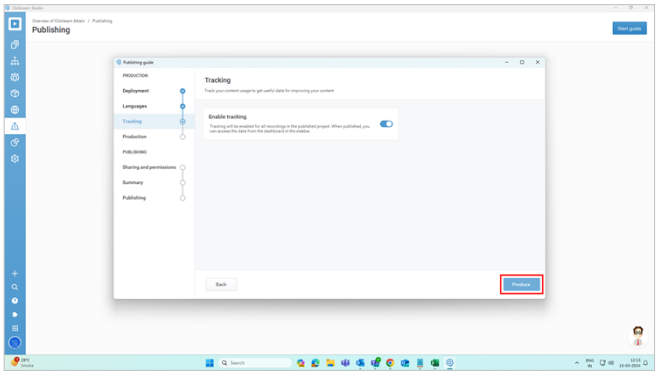
Click on the checkbox of the grid cell **For Language**.



Click on the button **Next**.

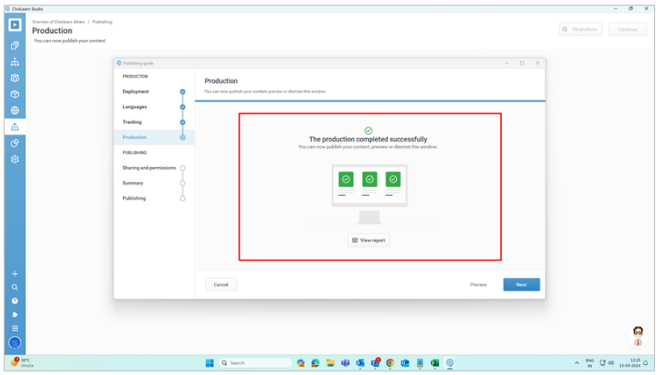


Click on the button **Produce**.

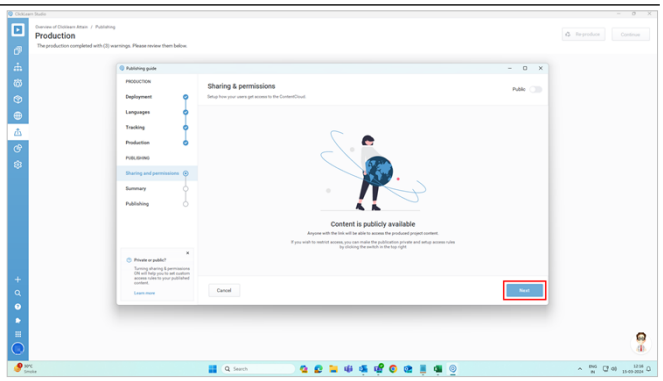


The production is completed successfully.

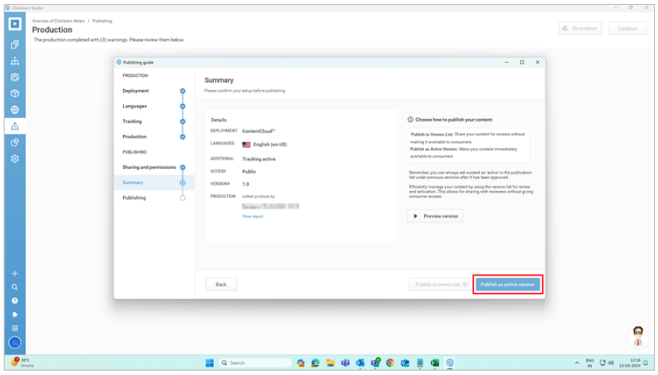
Click on the button **Next**.



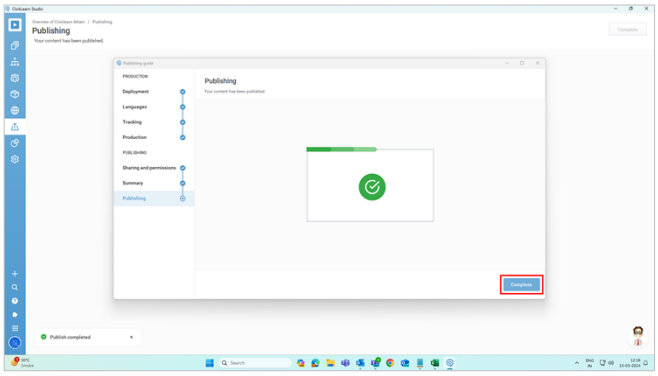
Click on the button **Next**.



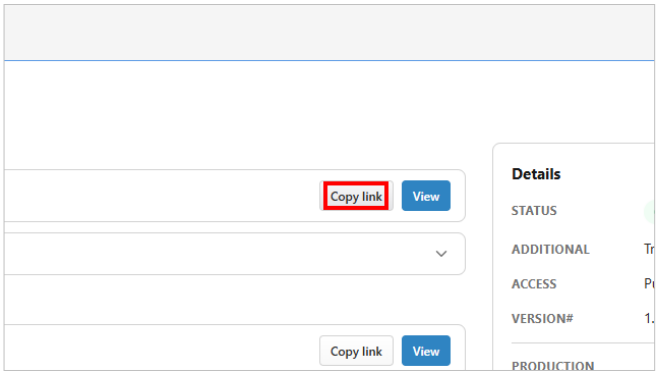
Click on the button **Publish as active version**.



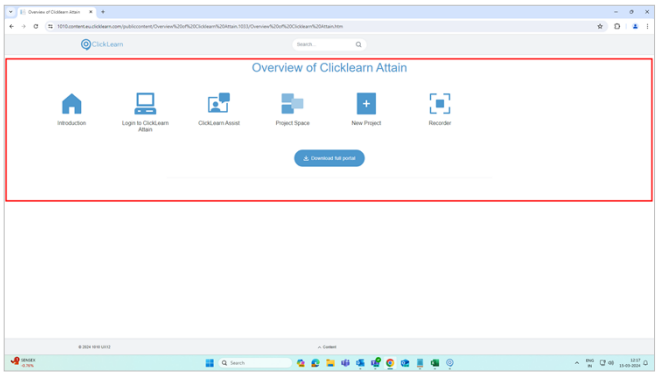
Click on the button **Complete**.



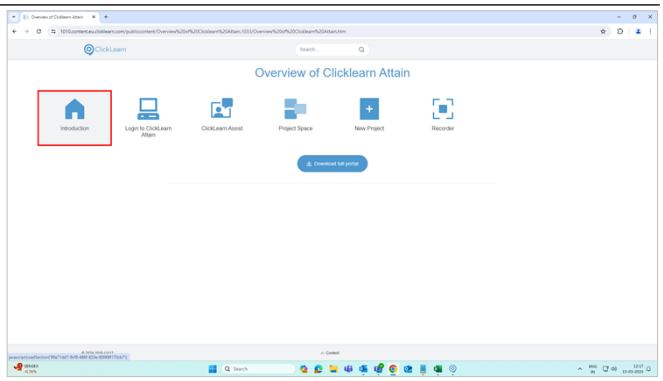
Click on **Copy link**.



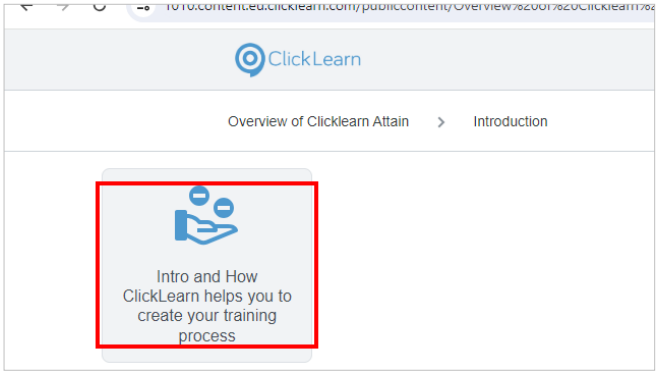
Paste the copied link in the web browser and press enter. This is what the published content looks like.



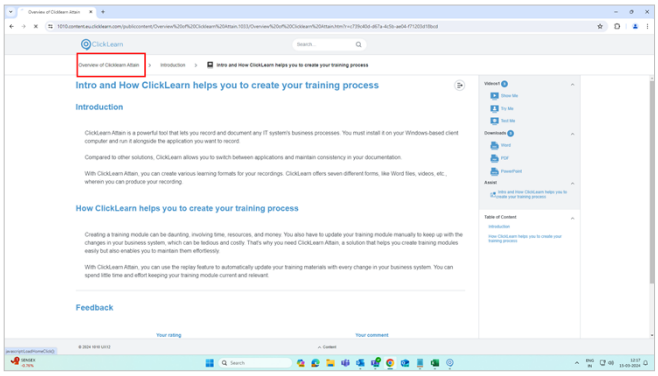
Click on the link **Introduction**.



Click on the link **Introduction**.

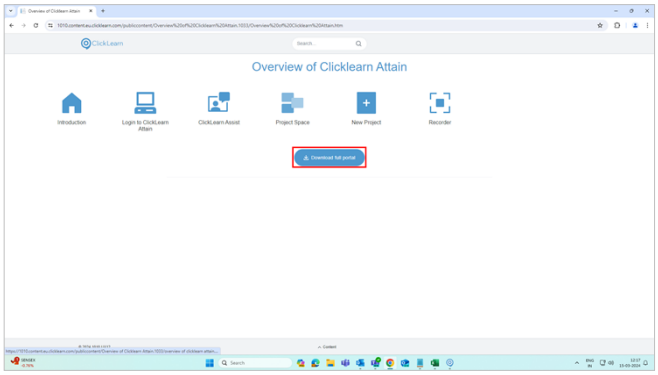


Overview of Clicklearn Attain: This is what the recording looks like.



Click on the link: **Download full portal**.

This will download the complete portal in a pdf format.

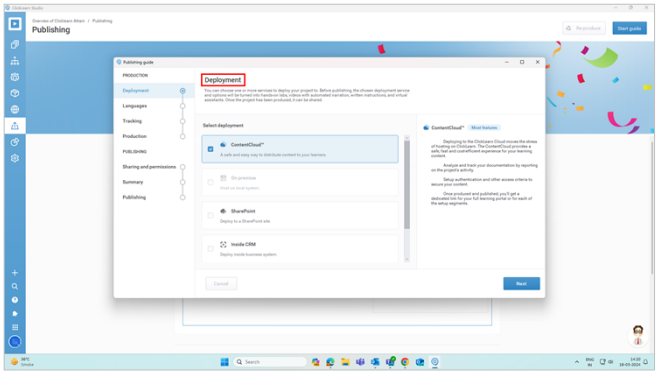


13.3.Deployment

13.3.1. Deployment Options Explained

Content delivered wherever your users work, to deploy through ContentCloud, on-premise, SharePoint, CRM, or Business Central without maintaining separate hosting setups.

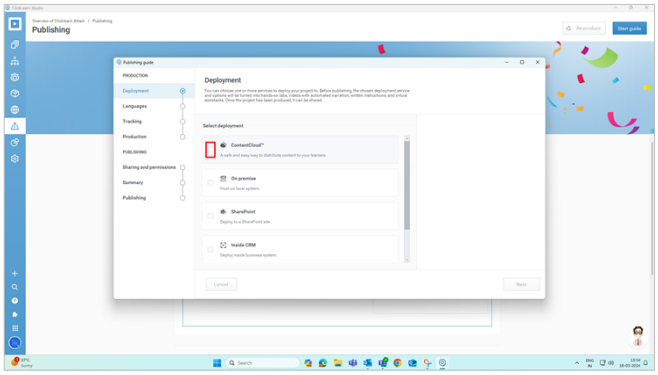
Deployment: Deployment allows you to choose one or more services to deploy your project. Before publishing, the chosen deployment service and options will be turned into the hands-on lab, videos with automated narration, written instructions, and virtual assistants.



ContentCloud: Deploying to the ClickLearn Cloud moves the stress of hosting on ClickLearn. The ContentCloud provides a safe, fast, and cost-efficient experience for your learning content.

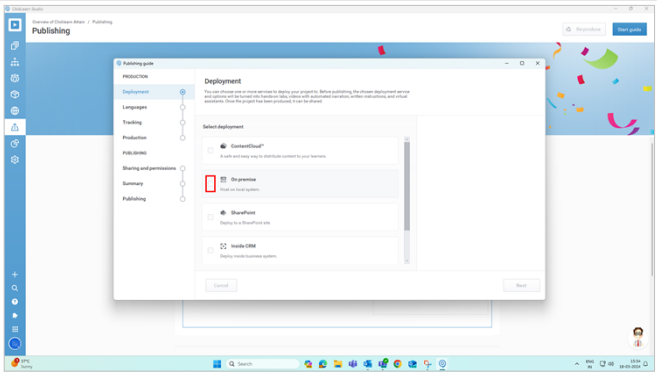
Analyze and track your documentation by reporting on your project's activity. Set up authentication and other access criteria to secure your content.

Once produced and published, you'll get a dedicated link for your full learning portal and each segment you set up.
NOTE: When opting for ContentCloud as the deployment option, it is possible to simultaneously select additional options such as SharePoint, Inside CRM, and Inside Business Central. When you choose **ContentCloud**, the **On-premise** deployment option is **disabled.**



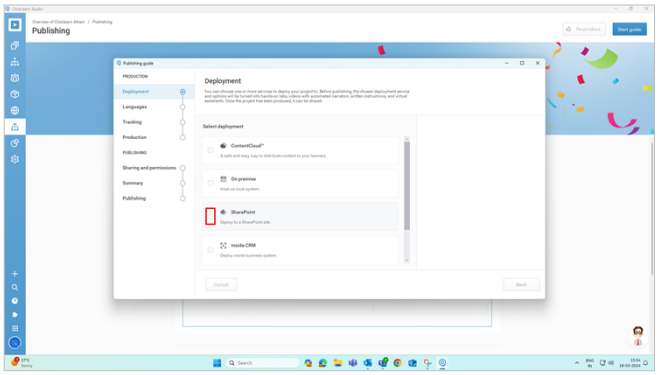
On-premise: Deploy the produced content on-premise. The system with ClickLearn Studio installed will save the deployable files.

NOTE: When you select the deployment option as On-premise, you can only choose **SharePoint**. The alternatives, including ContentCloud, Inside CRM, and Business Central, are not enabled for selection.



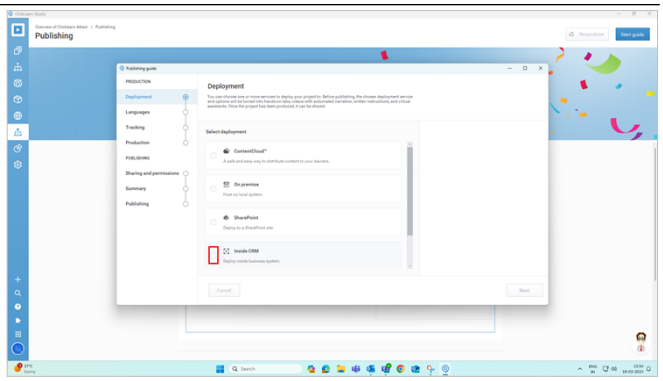
SharePoint: Host the produced content on the SharePoint site. Deployment is done by using a SharePoint app.

NOTE: When you select **SharePoint** as the deployment option, all deployment options are available for selection, including Content Cloud, On-premise, Inside CRM, and Inside Business Central.



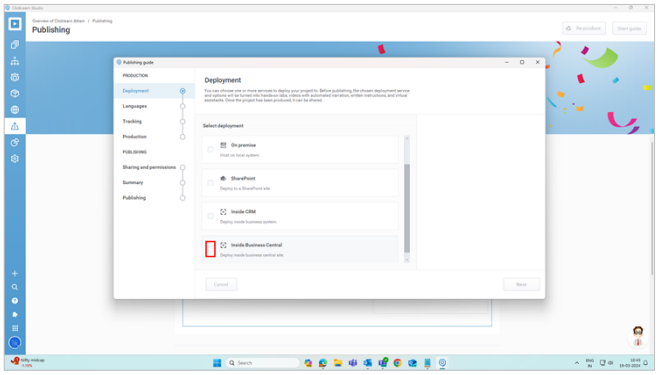
Inside CRM: Deploy the produced content in the CRM/CE system using the ClickLearn Assist for CRM, available through the same Help solution.

NOTE: When you select Inside CRM as the deployment option, the options available for selection include ContentCloud, SharePoint, Inside CRM, and Inside Business Central. The **On-premise** option is disabled.



Inside Business Central: Deploy the content produced in the Business Central application using the ClickLearn extension. ClickLearn Assist for Business Central will be available through the same extension.

NOTE: When you select Inside Business Central as the deployment option, the deployment options available for selection include ContentCloud, SharePoint, and Inside CRM. The **On-premise** option is disabled.



13.3.2. Deploy to SharePoint

Learning content hosted right inside SharePoint, to deploy through the ClickLearn app, HTML embedding, or ASPX web parts without leaving your existing environment.

13.3.2.1. Introduction

ClickLearn Attain allows you to deploy and host your learning content on SharePoint. You can easily deploy your content on SharePoint sub-sites based on the end users you want to reach out to and other requirements you might have to cater to.

This deployment guide describes the Microsoft SharePoint(c) deployment option and provides a step-by-step procedure for deploying your content to the SharePoint application.

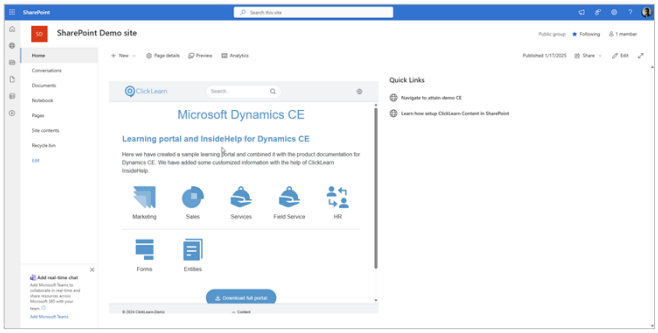
13.3.2.2. SharePoint Publishing Options

ClickLearn provides several options for publishing and hosting learning content in Microsoft SharePoint. Each option offers distinct benefits depending on how the organization intends to manage, update, and display its learning materials.

Understanding the differences between the available publishing methods SharePoint App (ClickLearn Content App), HTML embedding, and ASPX web parts is essential for administrators who want to select the right balance between ease of deployment, integration depth, and content management flexibility.

This section outlines the characteristics, advantages, and limitations of each publishing approach.

13.3.2.2.1. SharePoint App (ClickLearn Content App)



The SharePoint App offers a streamlined and integrated method for deploying ClickLearn content directly within SharePoint sites and sub-sites, allowing organizations to embed training materials seamlessly into their existing SharePoint environment.

By utilizing this dedicated app, administrators can centrally manage and update content across all sites, ensuring consistency and simplifying maintenance. The app leverages SharePoint's built-in security framework, including access control and permissions, to protect content and ensure that only authorized users can access it.

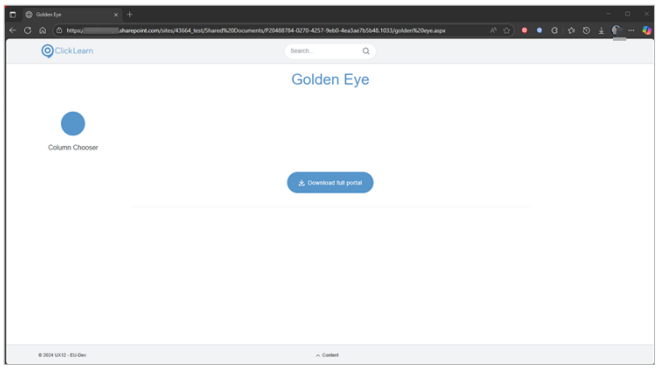
Note: *To access your content in the ClickLearn Content V2 app on SharePoint using your O365 login, you must have an active O365 subscription. If you don't have one yet, contact our Support team or your Customer Success Manager (CSM). They will send*

you the necessary signup email to help you get started with the integration.

13.3.2.2.2. HTML Embedding

HTML embedding provides a simple and effective method for displaying ClickLearn content directly within SharePoint pages by using HTML links. This approach allows administrators to easily insert content into a page without the need for additional apps or complex configurations. It offers a quick and straightforward setup process, making it ideal for environments that require minimal technical overhead.

13.3.2.2.3. ASPX Web Parts



ASPX web parts are custom components that can be embedded directly into SharePoint pages using the ASPX framework, providing a highly flexible way to integrate and display ClickLearn content. This approach enables administrators to have full control over the presentation and functionality of the content, supporting the addition of dynamic elements, custom styling, and advanced interactive features. By leveraging SharePoint's native capabilities, such as workflows, user profiles, and lists, ASPX web parts allow for a deeply integrated and seamless user experience.

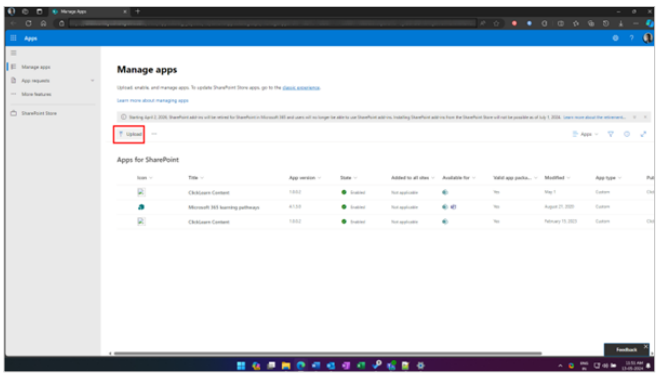
Note: To generate ASPX files for an on-premise SharePoint deployment, you must select both the On-Premise and SharePoint options simultaneously during the publishing process in ClickLearn Attain. Once published, the ASPX files will be available for deployment directly to your on-premise SharePoint environment.

13.3.2.3. Deploying ClickLearn Content on the SharePoint App

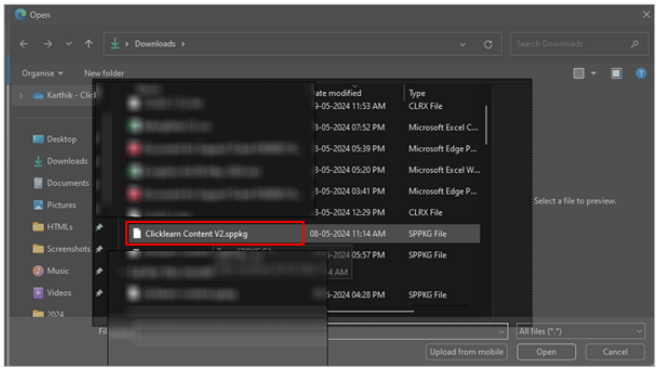
Download the ClickLearnContentV2.sppkg from the below link.

ClickLearnContentV2.sppkg

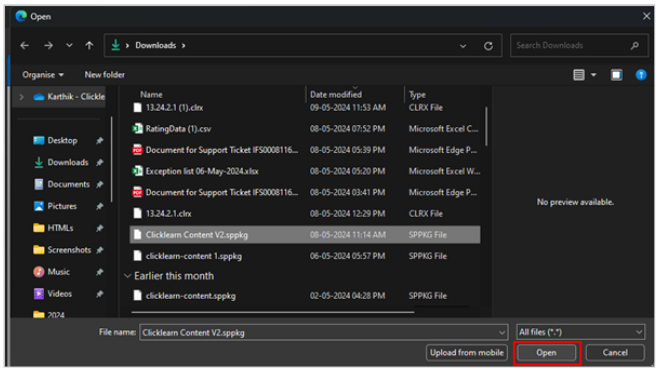
Navigate to the SharePoint App catalogue. Click on the button **Upload**.



Select the package you want to upload.



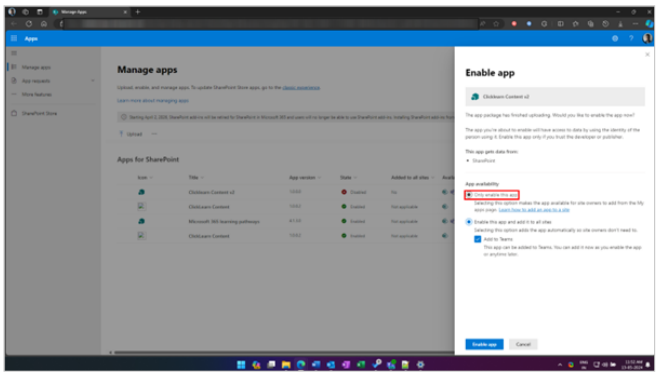
Click on the **Open** button.



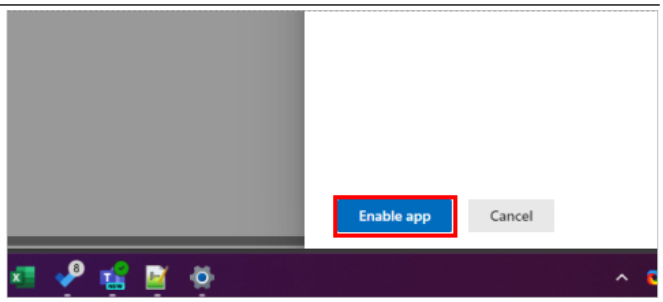
You can use the default setting to apply the application across all sites. However, it is advisable to turn off the team's features for optimal performance. Otherwise, you should follow the below steps and make sure to add the app to each site.

Note: It's recommended you use the option "Only enable this app."

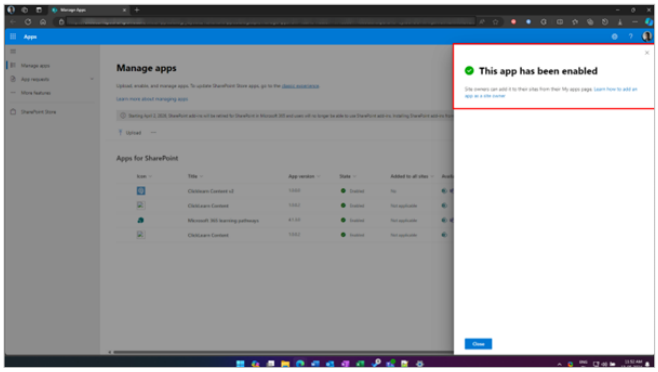
Click on the label: **Only enable this app**.



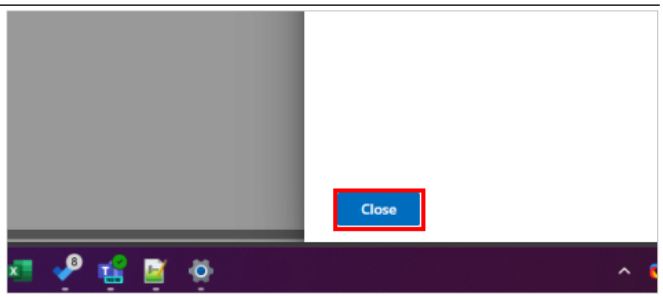
Click on the button **Enable** app.



A success message will appear, and then you can close the modal.



Click on the button **Close**.

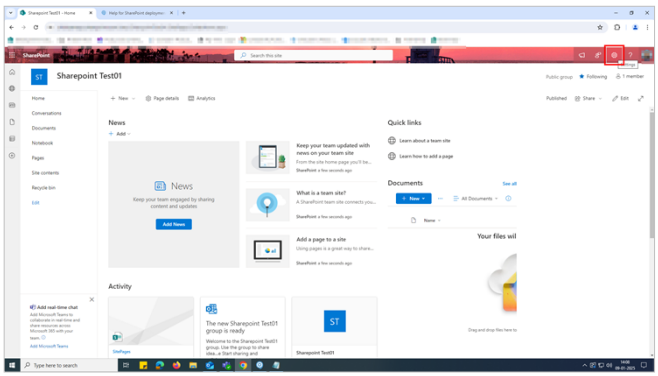


13.3.2.4. Adding the ClickLearn Content app to the SharePoint sub-sites

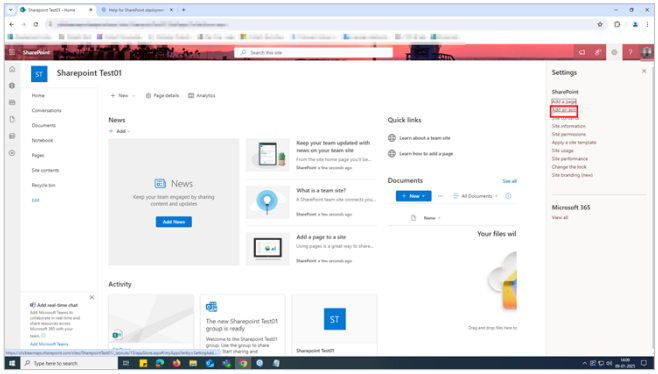
Navigate to the SharePoint site where you want to deploy your learning content.

Note: As this feature is on a site level, adding the ClickLearn Content App to the site at the top level will not make it visible in the subsites. You must perform the following steps for each sub-site where you want to use the ClickLearn Content App. For example, you might want to segment your learning content for different departments in your organization. You can follow the steps below to create a separate site for each department.

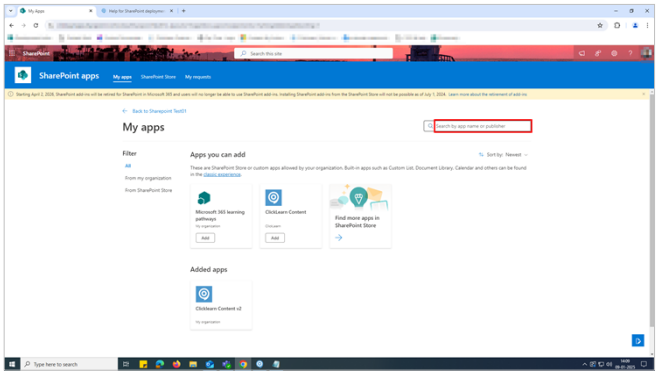
Click the **Settings** icon on the top-right corner of the screen.



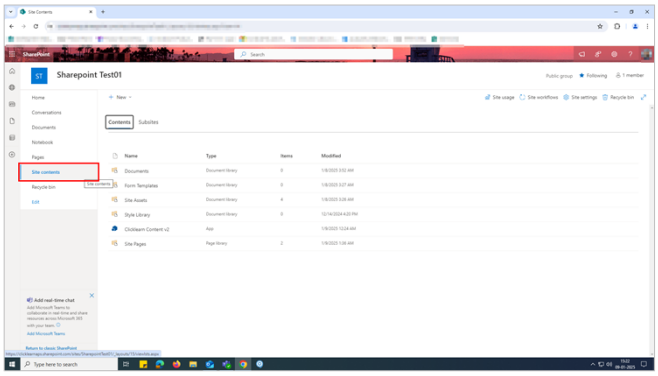
Click the **Add an App** option from the Office 365 Settings drop-down menu.



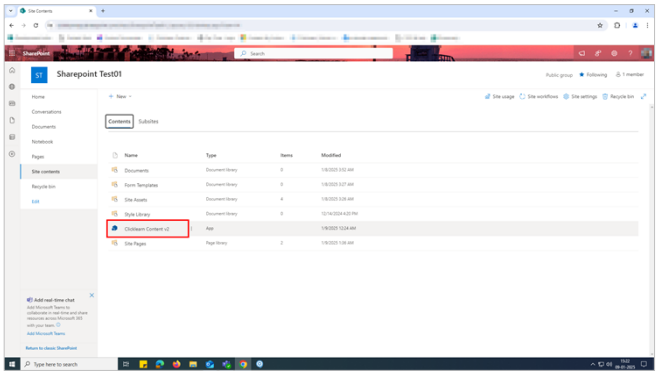
Click on the input field **Search by app name or publisher** and enter ClickLearn Content v2.



Click on the button **Site contents**.

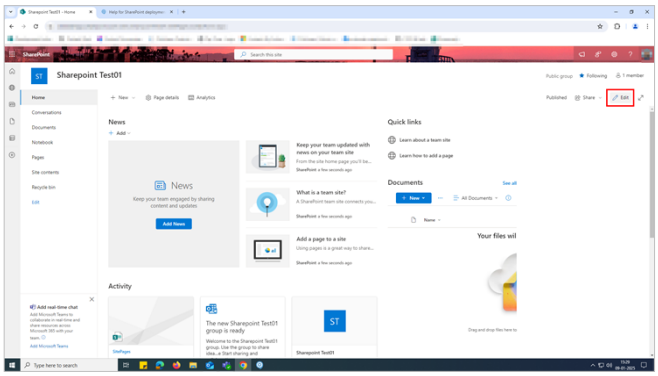


Once you click on the Site Contents page, you can see the ClickLearn Content app added.

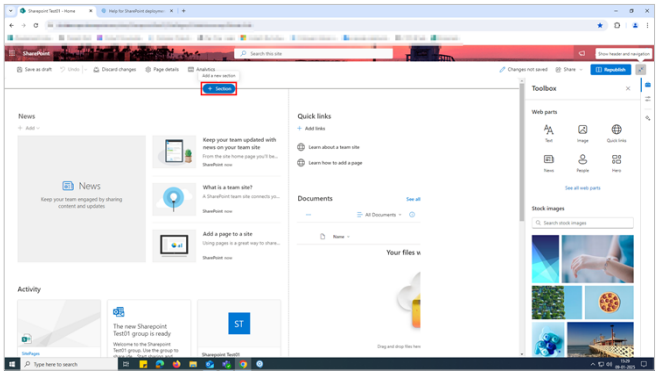


13.3.2.4.1. Adding the ClickLearn Content app to the SharePoint page

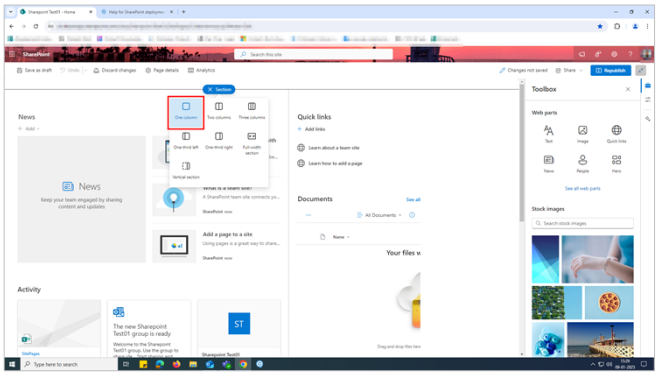
Click the **Edit** button from the top right corner of the screen.



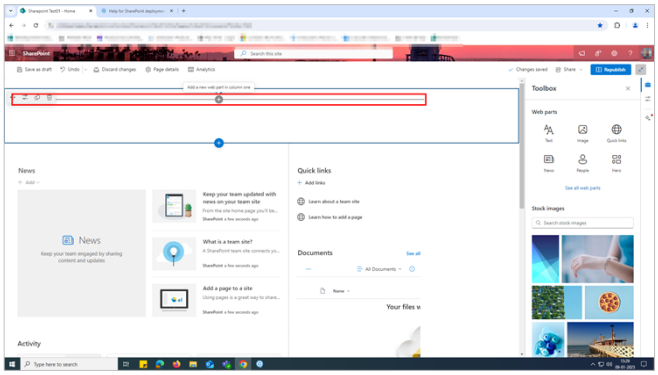
Click the **Add Section** icon.



Click on the button **One column.**

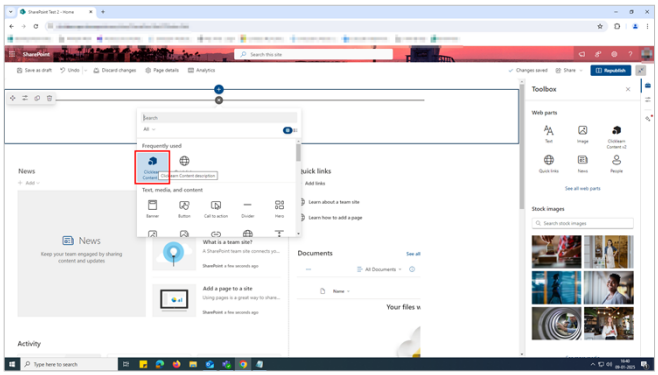


Click on the button **add a new web part in column one.**



Select the **ClickLearn Content** app from the box displayed.

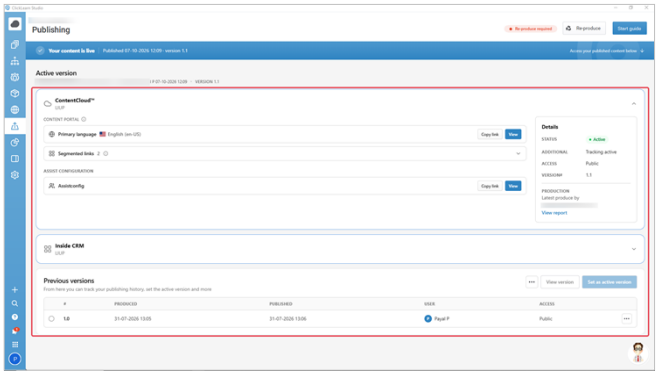
The ClickLearn Content App Part will be added to the page. However, it displays the Content URL missing because you have not configured the content URL yet. You must copy the content URL from the Publishing options in ClickLearn Attain. Follow the steps below to copy and add the content URL to the SharePoint site.



13.3.2.4.2. Copying the Content URL from ClickLearn Attain

The Publishing -> Lift-off screen in Attain lists the content URL(s) of the content published on the ContentCloud. While creating the structure for your learning portal, you might have done segmentation for your content based on languages or departments that will have access to some specific content. The content URLs are listed segment-wise on the Lift-off screen.

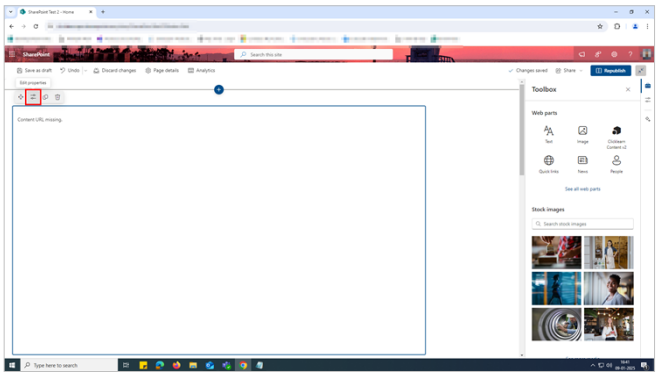
To copy the required content URL, click the Copy button next to the content URL.



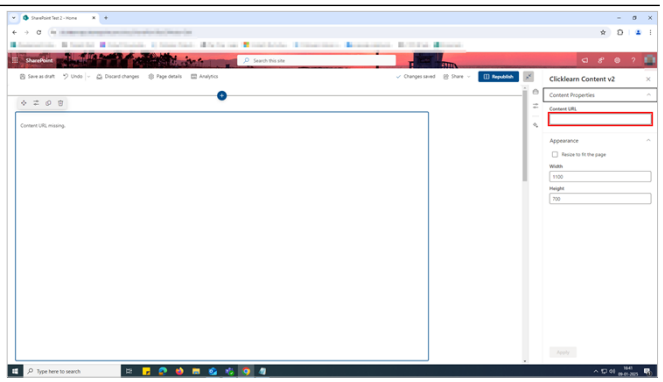
To add the copied content URL to the SharePoint site, follow the steps below.

13.3.2.4.3. Adding or Configuring the Content URL

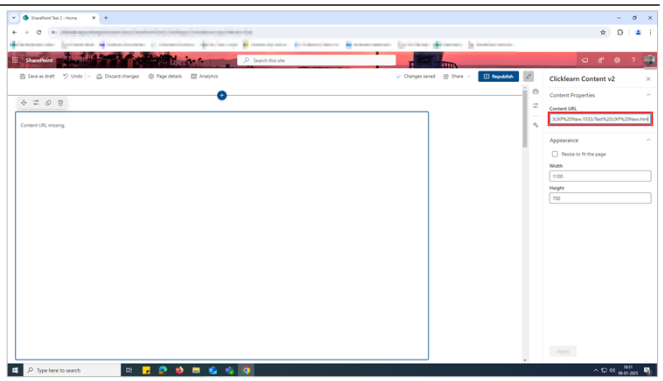
Click on the button **Edit properties.**



Click on the input field **Content URL**

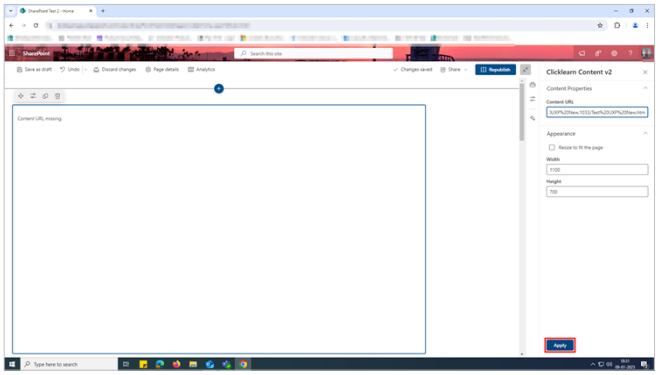


Press **CTRL+v**.

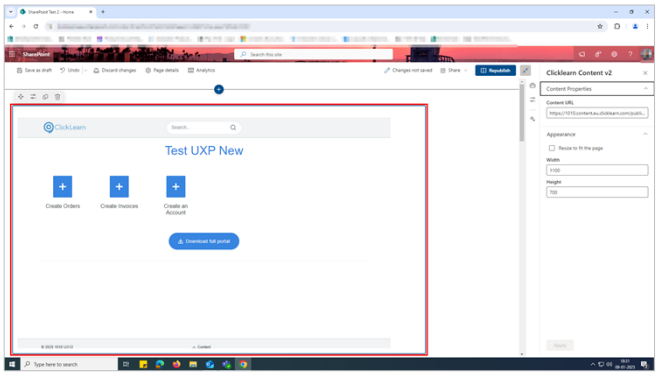


Specify the content URL you copied from Attain in the Content URL text box.

Click the **Apply** button.



Content will be loaded as shown in the screenshot. You can change the size of the content window by following the same steps as given. The changes made to the page are saved automatically.



13.3.3. Deploy to Business Central

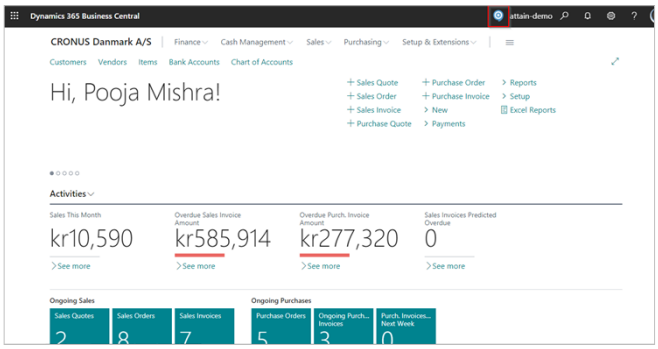
Guided learning inside Business Central, to install, configure, and import content so users learn in the flow of work without leaving the application.

13.3.3.1. Installing the ClickLearn BC Application

Download and install the ClickLearn BC application from the App Source by using the link below.

ClickLearn BC application

Once the application is installed, you can see the ClickLearn icon on the title bar of the Dynamics 365 Business Central application.



13.3.3.1.1. Setting up Permissions for ClickLearn BC Application

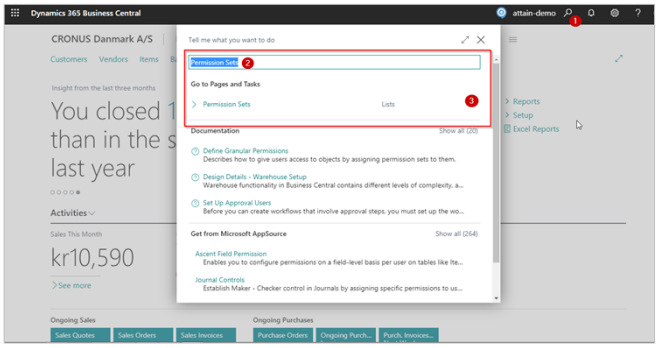
Note: You need to have administrator role to be able to perform the steps below.

After installing the ClickLearn BC Application, follow the steps below for setting up the permissions for the application.

Click the **Search icon** on the BC application title bar.

Search for “**Permission Sets**”.

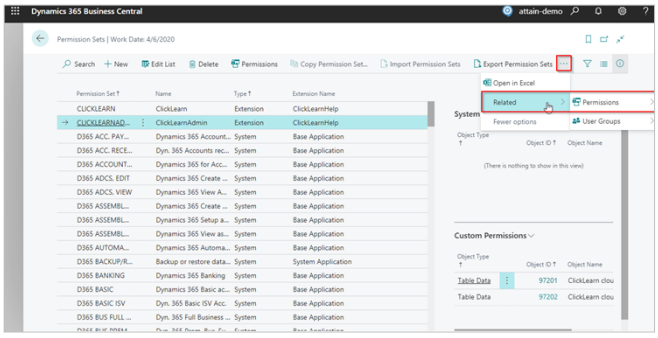
Click the **Permission Sets** option.



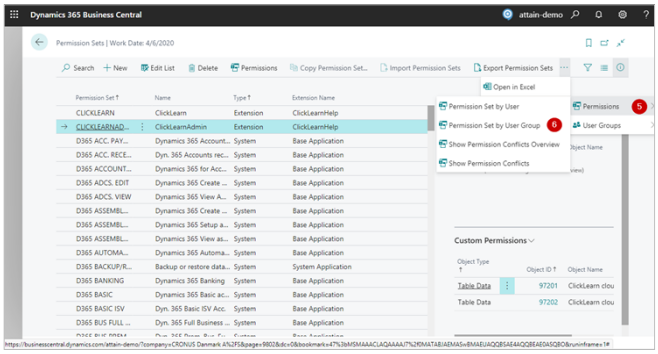
When you install the ClickLearn Help extension, you are provided with two permission sets, one is “ClickLearn” and another one is “ClickLearn Admin”. The Configuration option in the Help menu is only visible and accessible to the “ClickLearn Admin” user group.

Click the **three dots** on the menu bar and point to Related menu option from the menu.

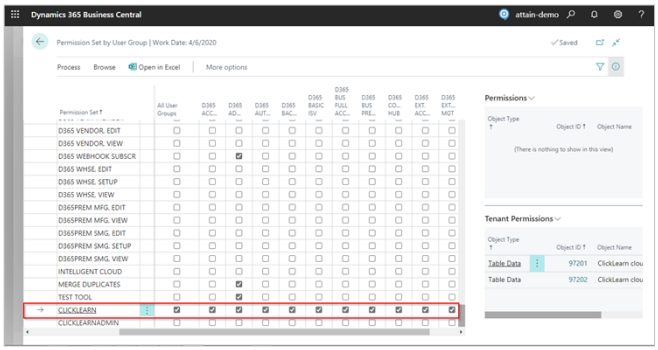
Point to Permissions from the displayed menu.



Click **Permission Set** by User Group.



Find the “ClickLearn” Permission Set and check the **All User Groups** box. Alternatively, you can select the different User Groups that should be able to see the Learning Portal(s).

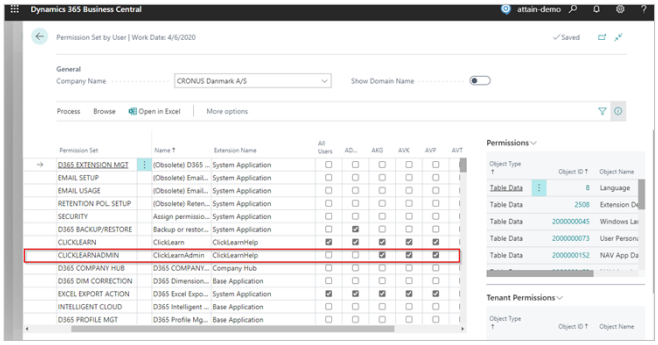


The second Permission Set called “ClickLearn Admin”, should be assigned to users who need to import new content to the ClickLearn BC application. To assign this,

Click the three dots on the menu bar and point to **Related > Permissions** from the displayed menu.

Click **Permission Sets by User**.

Select the specific user from the list and provide the ClickLearn Admin rights.



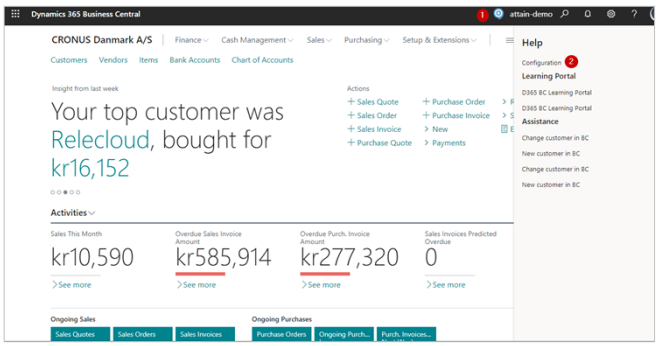
13.3.3.1.2. Configuring the ClickLearn BC Application

After setting up the user permissions for the ClickLearn BC application, follow the steps below for configuring the application.

Click the ClickLearn icon on the title bar to display the drop-down menu.

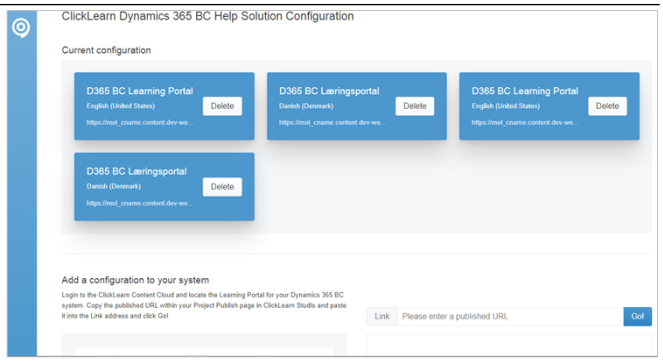
Click the **Configuration** option from the drop-down menu.

Note: You need to have administrator rights to view and access the Configuration option.

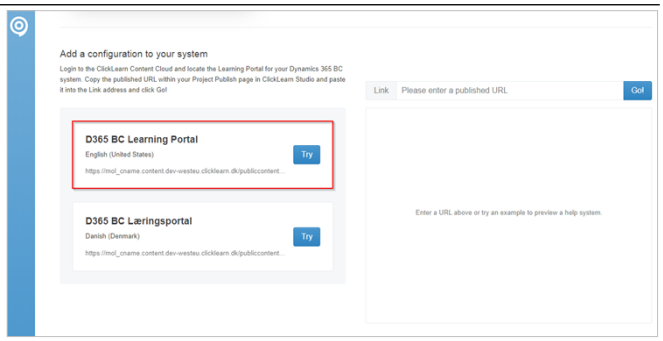


The ClickLearn Dynamics 365 BC help Solution Configuration page is displayed. The page is similar to the configuration page that you see in the Customer Engagement (CE) application.

The Current configuration section displays the learning portal(s), which have been imported to the Business Central application. You can now have multiple learning portals, one for each selected language.



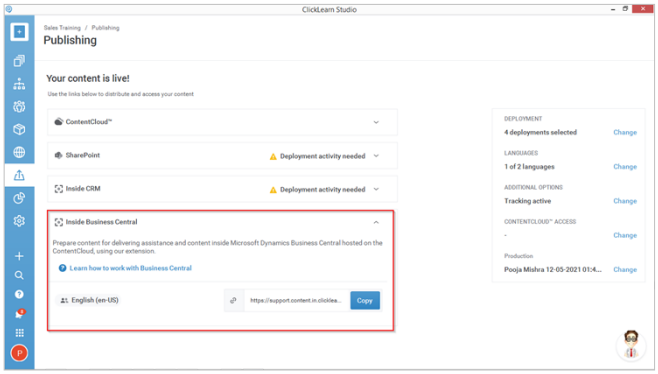
You have the option to view a learning portal by clicking the **Try** button displayed next to the learning portal.



You can import more Learning Portals to the BC application. To add content to these learning portals inside the BC application, you need to first copy the Learning Portal URL from ClickLearn Attain. To do this, follow the steps below.

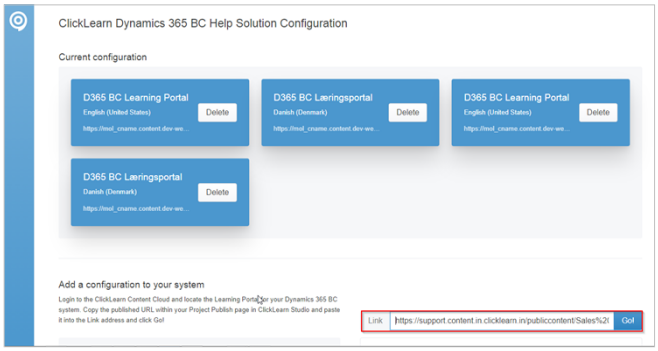
Copying the published content URL from ClickLearn Attain

- Open ClickLearn Attain.
- Open the required project from the Projects screen.
- Navigate to the Lift-off screen from Publishing options.
- In the Inside CRM section, click the Copy button displayed next to the content URL that you want to use to create your learning portal in the CRM system.



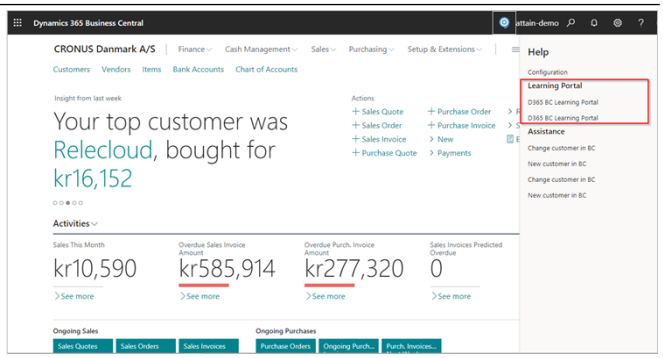
On the Current configuration page inside the BC application, paste the copied content URL from Attain in the Link address box.

Click the **Go** button.

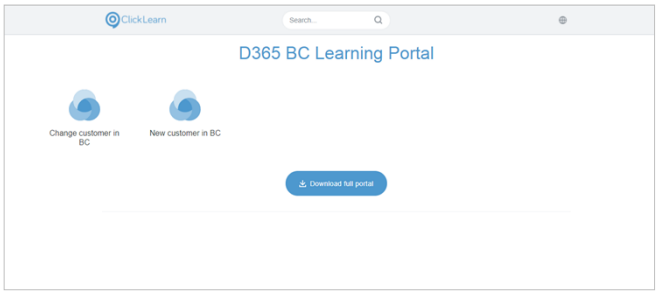


Click **Add to system** in the confirmation box.

Once a learning portal is imported in the BC application, all users will be able to see the new Learning Portal(s) in the Help menu, which is displayed when you click the ClickLearn logo.

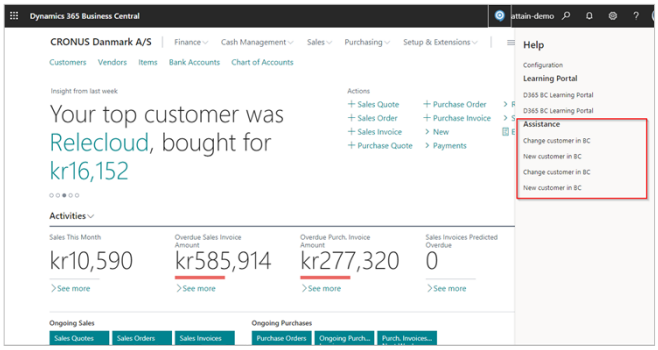


When you click the Learning Portal option, it will open a new browser tab showing the Learning Portal.

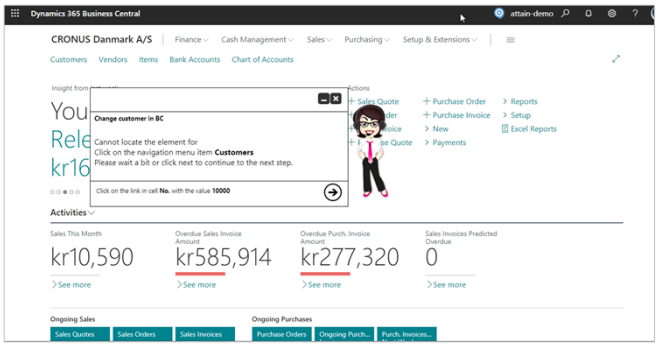


13.3.3.1.3. Interacting with the ClickLearn Assistant

Users can also interact with the new Virtual Assists associated with the various Learning Portals by using the options in the Help menu.



When you click an Assistance link, the embedded Virtual Assist will guide the user through the steps of the selected Project.



13.3.4. ClickLearnContent CRM Deployment

Install one solution file to bring ClickLearn into Dynamics 365 CRM, so users get language-specific learning portals and page-aware help from the Help menu, without any custom development.

13.3.4.1. Introduction

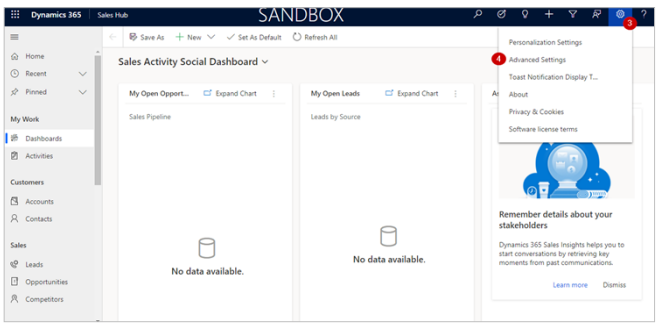
Download the d365ce solution file from the following URL.

https://apps.clicklearn.com/D365CEHelpSolution.zip

Open the Dynamics 365 application.

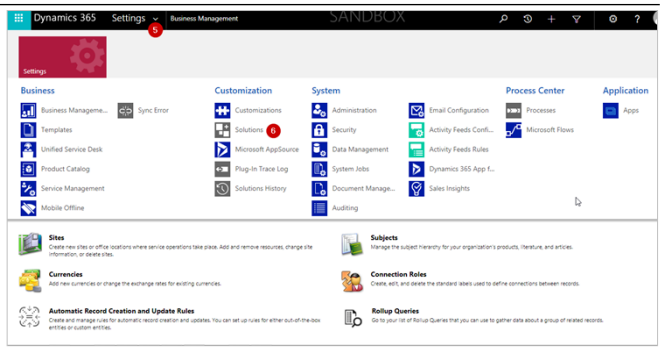
Click the **Settings** icon in the top right of the screen.

Select **Advanced Settings** option.

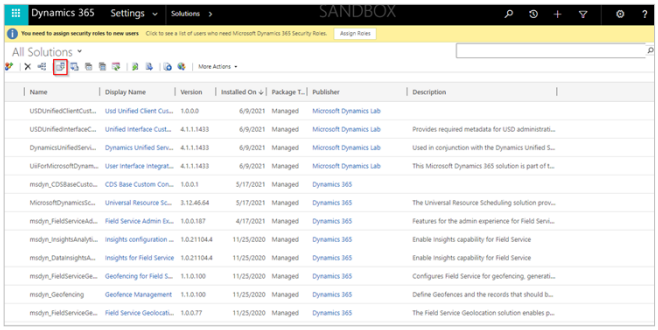


On the **Settings** screen, click the Settings drop down arrow.

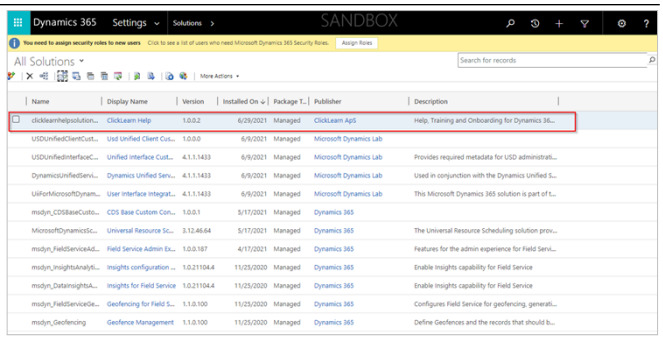
Select **Solutions** from the Customization list.



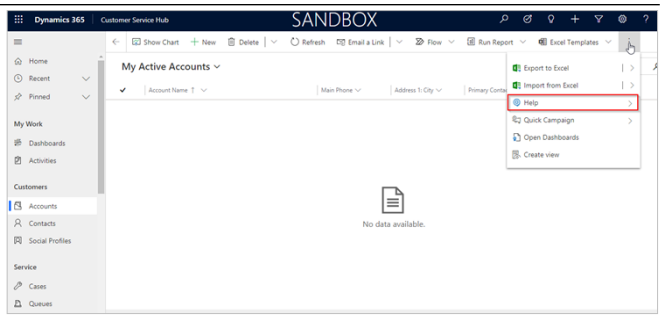
Click the **Import** option on the ribbon in the **All Solutions** screen to import the d365ce solution (downloaded and saved on your system in Step 1) in the Dynamics 365 CRM application. Once imported, the solution file will display in the solution list on the screen.



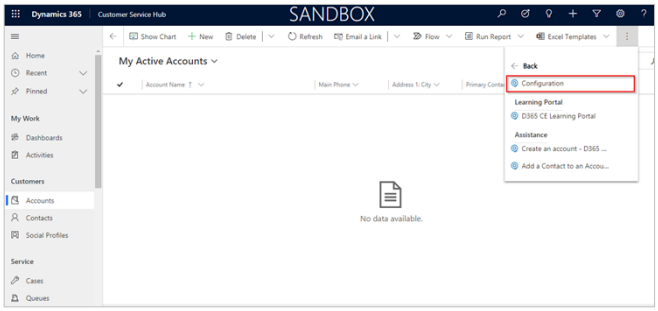
Click the **ClickLearn Help** solution file to install it. This is a single file for all solutions and is available even before you publish your ClickLearn project in Attain.



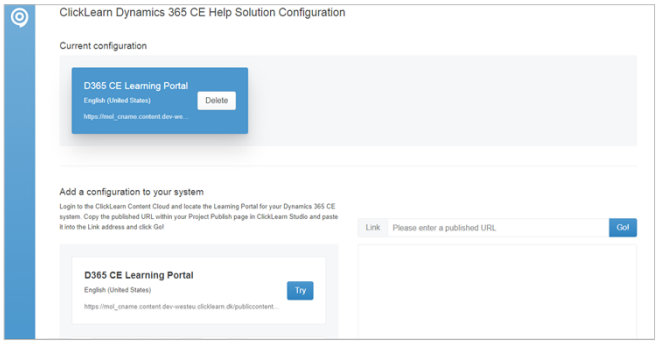
Once the solution file is installed, you see a **Help** icon displayed with other commands in the menu bar at the top of the page. If you do not see the **Help** icon, click the three dots next to the commands on the menu bar to display the icon.



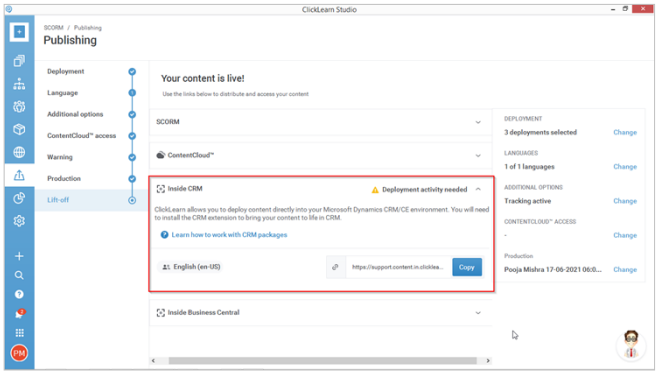
Click the **Help** option and select the **Configuration** from the menu.



The **Configuration** page displays the **Current configuration**. You can now have multiple learning portals, one for each selected language. However, these portals will be displayed according to the language that is currently selected in the Customer Engagement application.



To add content to these learning portals inside the CE system, you need to first copy the published content URL from ClickLearn Attain.

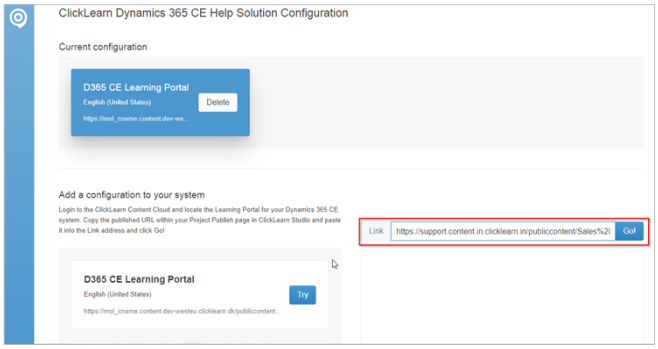


To do this, follow the steps below.

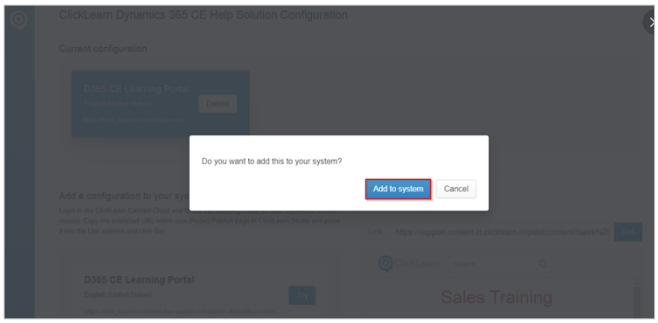
- Copying the published content URL from ClickLearn Attain
- Open ClickLearn Attain.
- Open the required project from the Projects screen.
- Navigate to the Lift-off screen from Publishing options.
- In the Inside CRM section, click the Copy button displayed next to the content URL that you want to use to create your learning portal in the CRM system.

On the **Current configuration** page inside the CE application, paste the copied content URL from Attain in the Link address box.

Click the **Go** button.

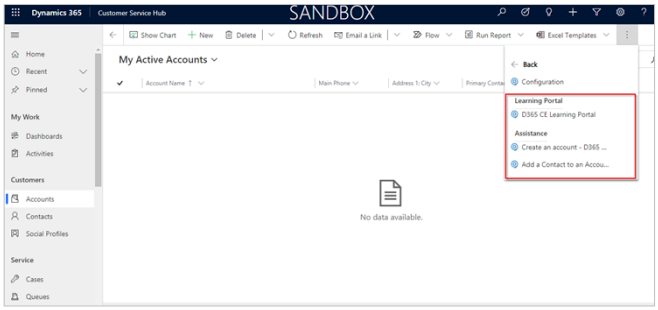


Click **Add to system** in the confirmation box.



The learning portal is created and added to the **Current configuration** page in the CE application.

You can access this learning portal from the **Help** menu on the Home page. The **Help** menu also displays the **Assistance** that is available for the current page that a user is viewing.



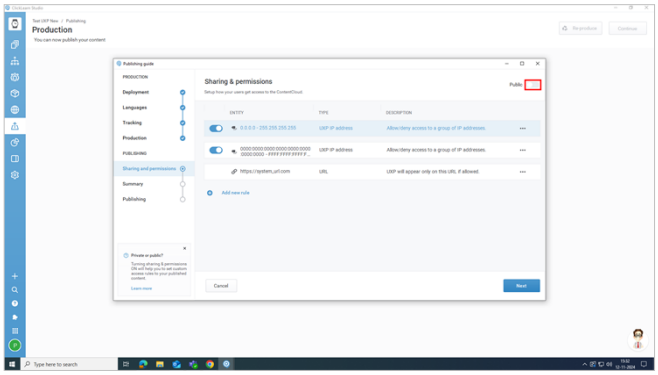
13.4.Add Bulk User Permissions

Access control for large teams in one upload, to download a template, fill in your users, and import permissions in bulk without adding rules one by one.

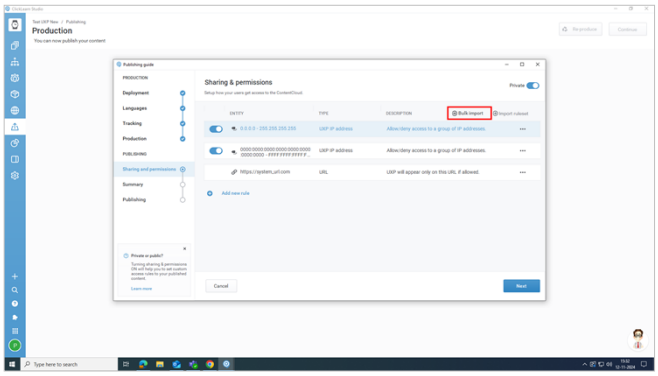
13.4.1. Introduction

Once the project is published, you can set custom access rules and add bulk permissions to published content.

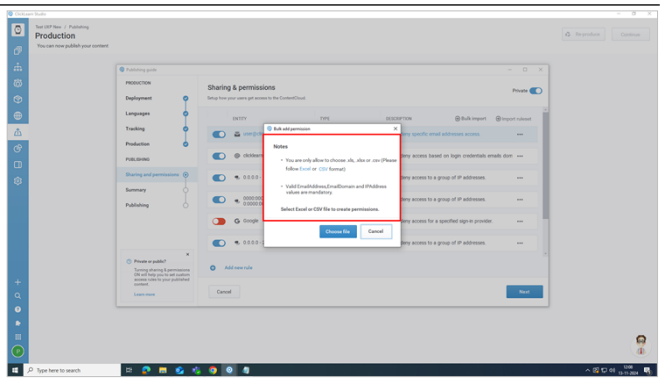
Click on the toggle switch **Permission.**



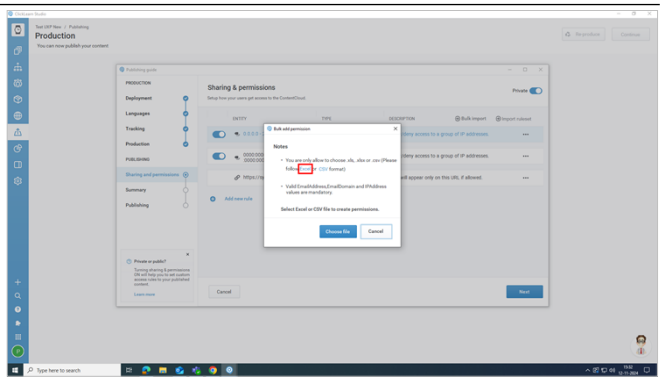
Click on the button **Bulk import.**



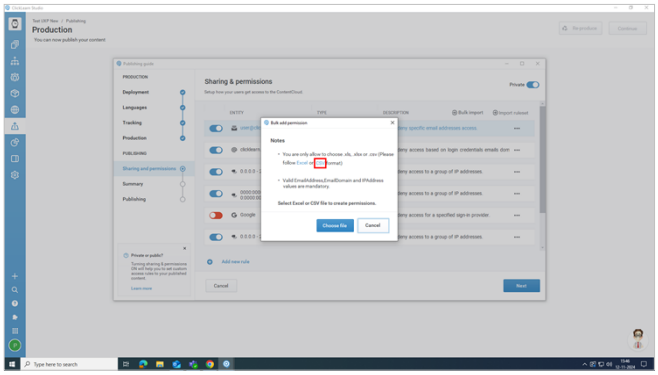
Once you hit the **Bulk import** button, a new dialogue box will open letting you choose files, either Excel or CSV.



Click on the label **Excel** to download Excel file.

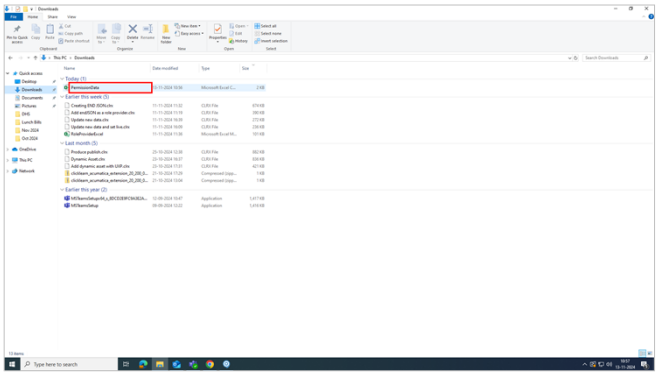


Click on the label **CSV** to download CSV file.

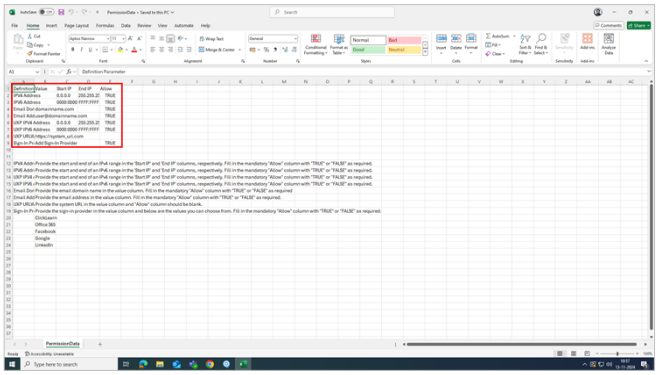


Double click on the **downloaded file** and open it.

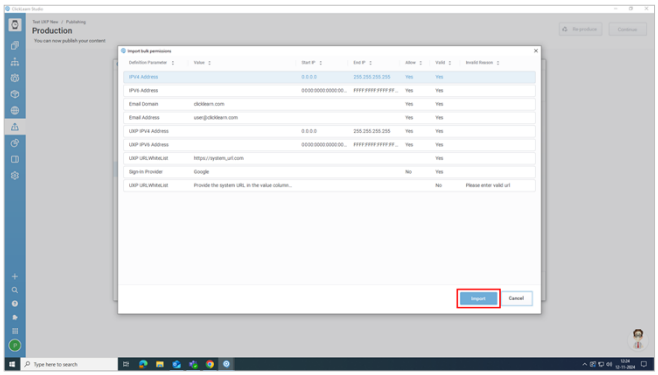
After downloading the files (**Excel** or **CSV**), fill in the information you wish to change.



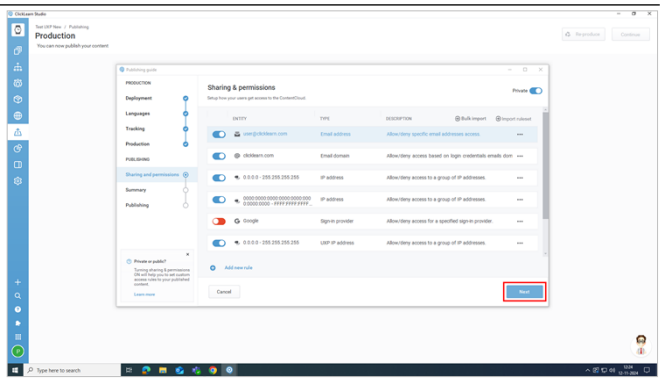
Fill in the information according to your requirements and then **save it**.



Click on the button **Import.**



Click on the button **Next.**
Make sure you produce and publish after adding it.



13.5.Make Content Private with Permissions

Full control over who sees your content, to enable permissions, set access rules, bulk-import users, and verify access without exposing anything to the wrong people.

13.5.1. Introduction

Once your content is published, you may need to control who can view it. Whether you're protecting sensitive material, limiting access to a specific audience, or setting up permission-based access, the publishing workflow makes it easy to add rules that decide who gets in and who doesn't.

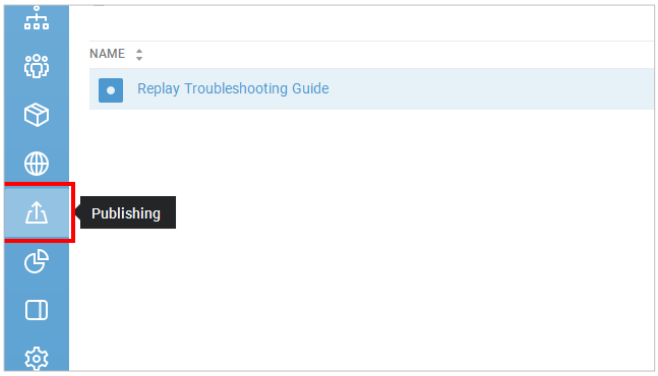
This guide walks you through the full process: from opening the publishing flow to adding permission rules, importing user lists, and verifying that your private content is accessible only to the right people.

Note:- Setting content to private does not delete it or unpublish it. It stays live but becomes visible only to users who meet the rules you define.

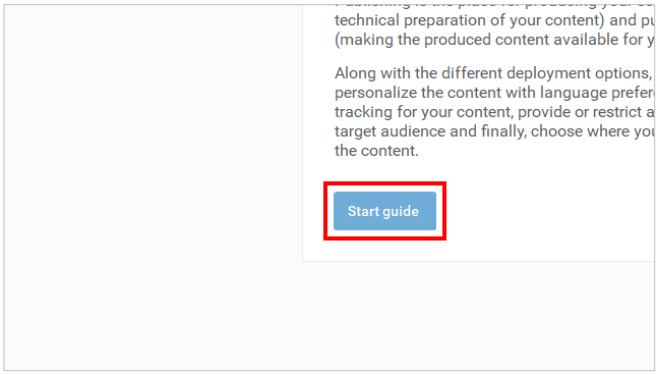
13.5.1.1. Starting the Publishing Flow

To begin, you'll launch the publishing guide, which walks you through each stage of getting your content ready for controlled access.

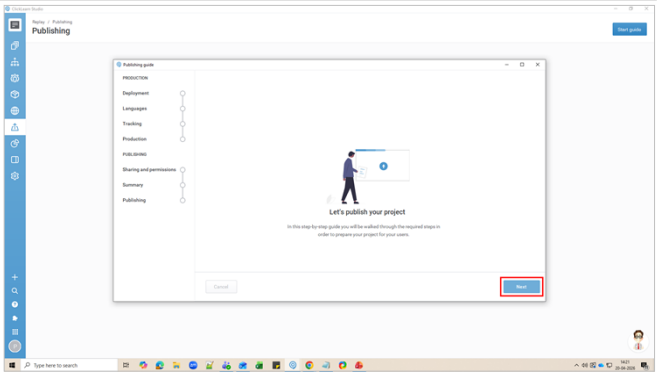
Click on the button **Publishing**



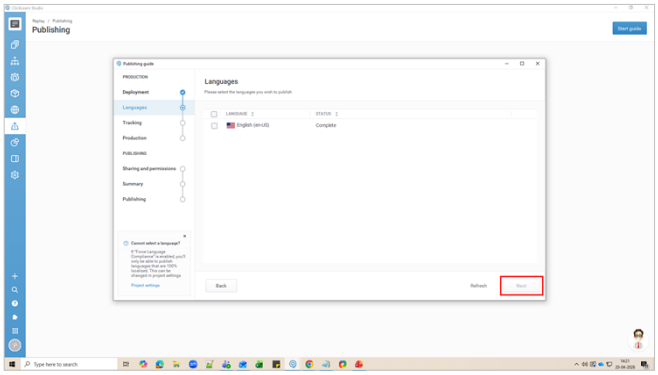
Click on the button **Start guide**



Click on the button **Next**

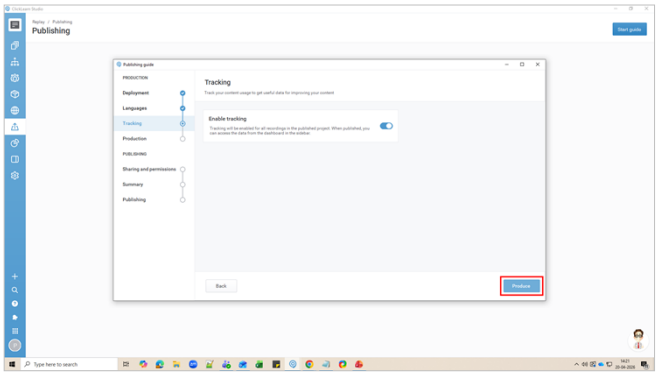


Click on the button **Next**

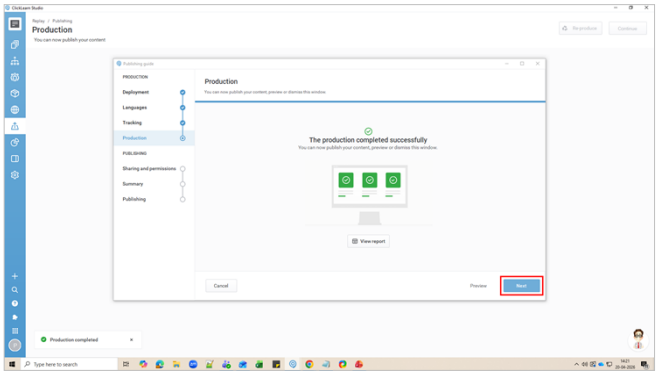


Click on the button **Produce**

Tip: Make sure your content is finalized before clicking Produce. Any edits made after this step will require you to produce a new version.



Click on the button **Next**

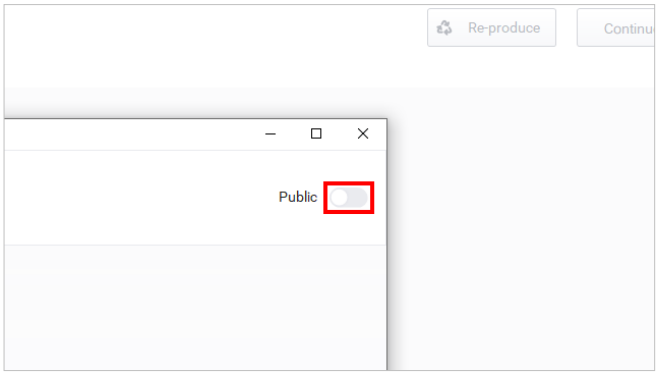


13.5.1.2. Enable Permissions

Click the toggle **Permission** toggle to turn it on.

This enables access control for your content. Once active, anyone visiting your content link will be checked against the rules you set. If they don't meet a rule, they'll be denied access.

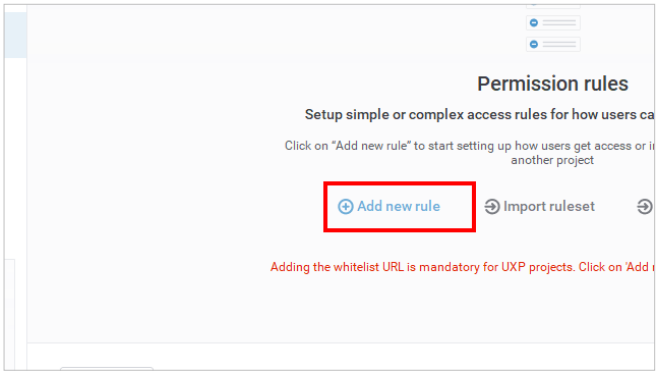
Note: If the Permission toggle is left off, your content remains publicly accessible to anyone with the link, regardless of any rules you may have configured below.



13.5.1.3. Add new rule

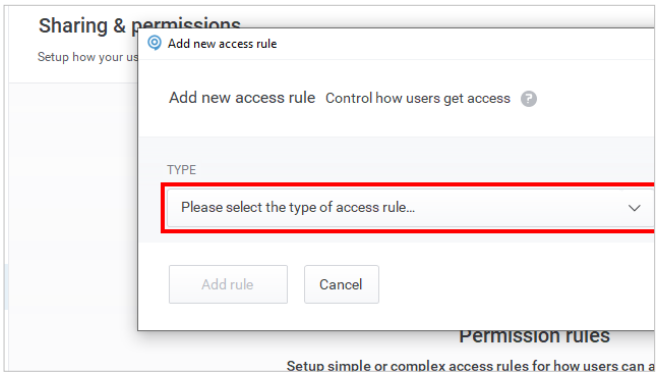
Rules are the conditions that decide whether someone can view your content. You can add one rule or combine several each rule checks something specific about the visitor, like their email address, IP address, or how they signed in.

Click on the button **Add new rule**

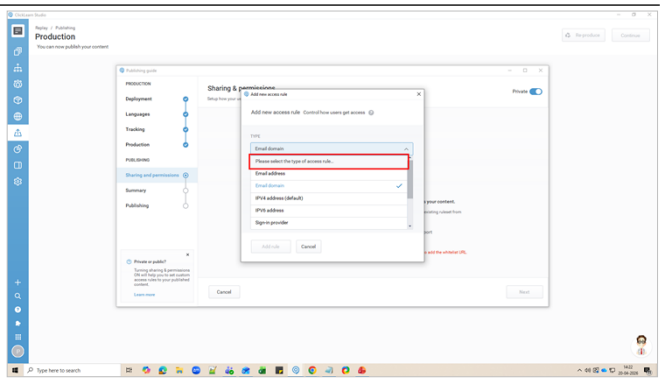


13.5.1.3.1. Available Rule Types

Click on the dropdown **Access Type**



Click on the **Access Type dropdown**



Each rule type targets a different piece of information about the visitor. Here's what each one does and when to use it.

- **Email Address** - This rule checks the visitor's exact email address. Use it when you want to grant or deny access to specific, known individuals.
- **Email Domain:-** Instead of targeting one person, this rule applies to everyone whose email belongs to a specific domain, for example, everyone at @yourcompany.com. This is useful for restricting content to an entire organization or group.
- **IPv4 Address (default)** - This rule restricts access based on the visitor's IP address — the unique number that identifies their device or network on the internet. IPv4 is the most common IP format (e.g., 192.168.1.1). You can target a single address or a range of addresses, which is useful for allowing only users on a specific office network or VPN.

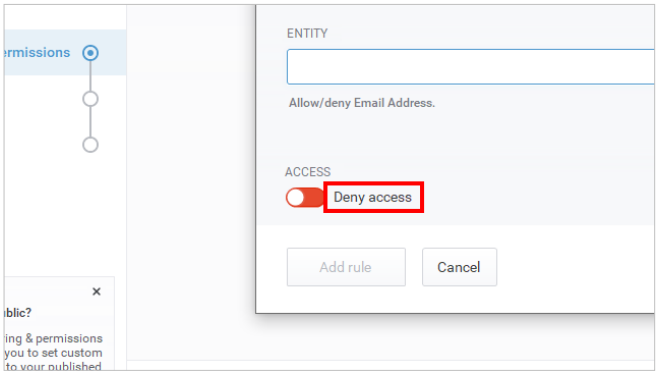
- **IPv6 Address**: - IPv6 is a newer IP address format used by many modern networks (e.g., 2001:0db8:85a3::8a2e:0370:7334). This rule works the same way as IPv4 but targets IPv6 addresses. Use it if your organization uses IPv6, or if you need to cover both formats.

- **Sign-In Provider**: -
- **ClickLearn** — Users authenticated through the ClickLearn platform directly.
- **All Sign-In Providers** — Applies the rule to any authenticated user, regardless of how they signed in.
- **O365** — Users signed in via Microsoft Office 365 (common in enterprise environments).
- **Facebook** — Users authenticated through their Facebook account.

- **Google** — Users authenticated through their Google account.

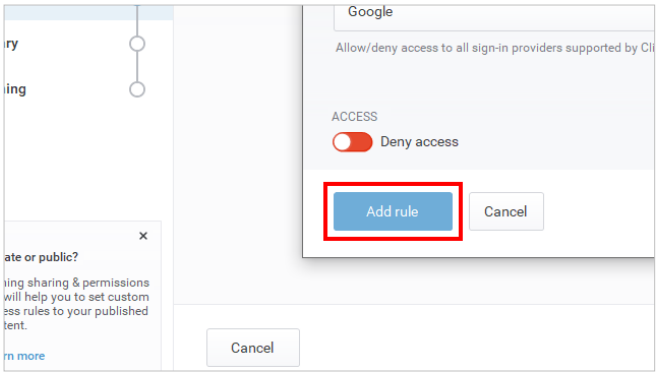
Click on the label Deny access.

Select Allow or Deny access to determine whether this address should be permitted or blocked.



Click on the button **Add rule**

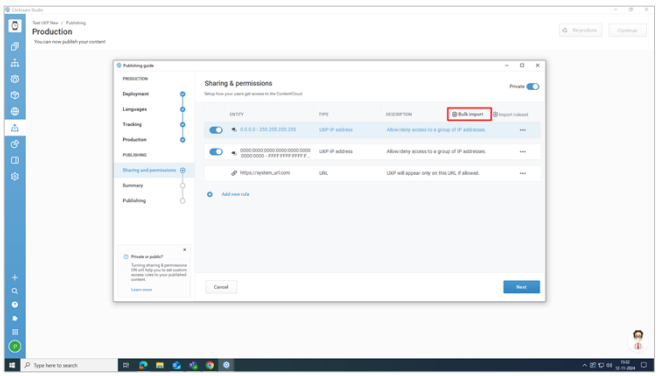
Repeat this process for each rule you want to add.



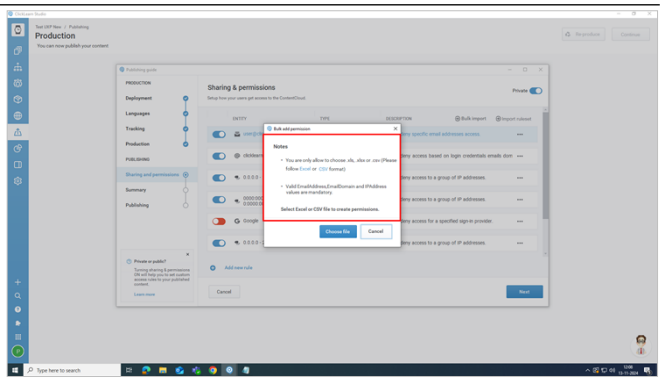
13.5.1.3.2. Bulk Import

If you need to add a large number of users or rules at once, the Bulk Import feature lets you upload a file instead of entering them one by one. This is ideal when managing access for large teams or organizations.

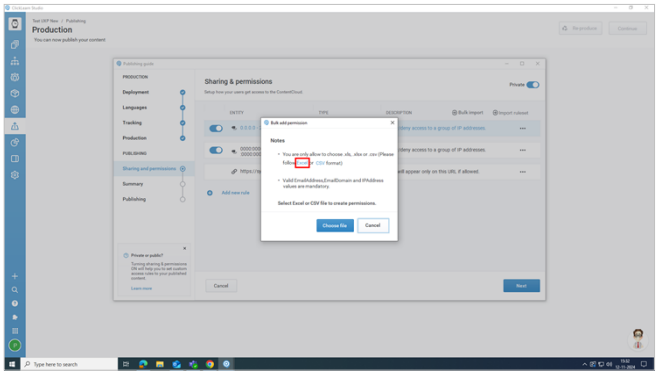
Click on the button **Bulk import.**



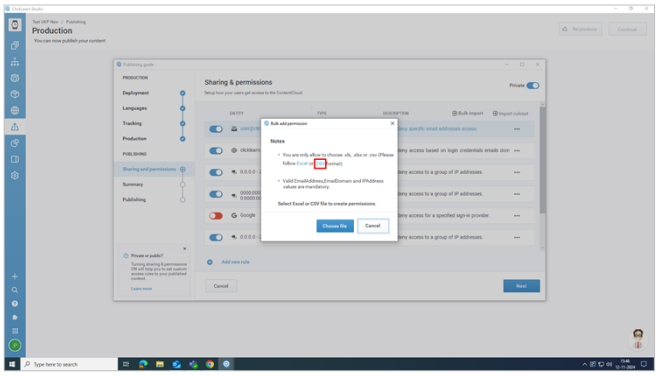
Once you hit the **Bulk import** button, a new dialogue box will open letting you choose files, either Excel or CSV.



Click on the label **Excel** to download Excel file.

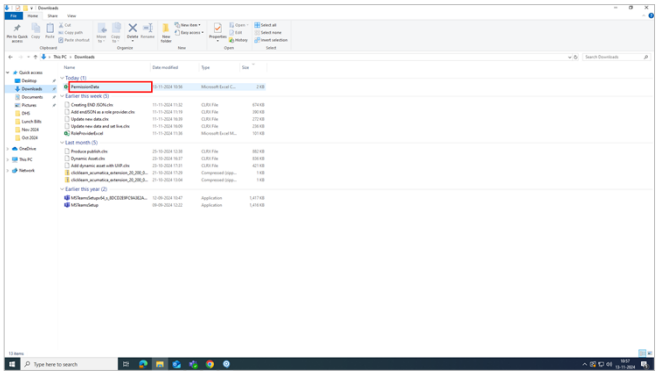


Click on the label **CSV** to download CSV file.

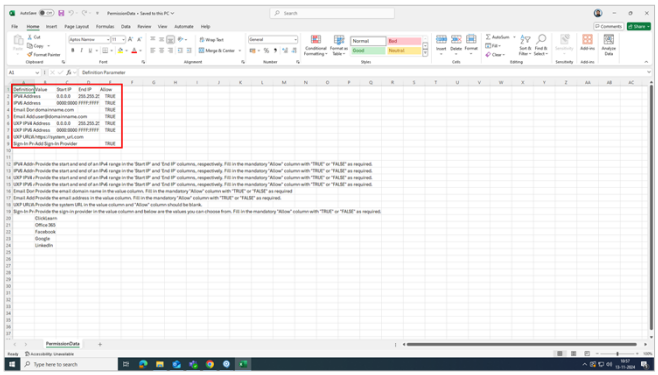


Double click on the **downloaded file** and open it.

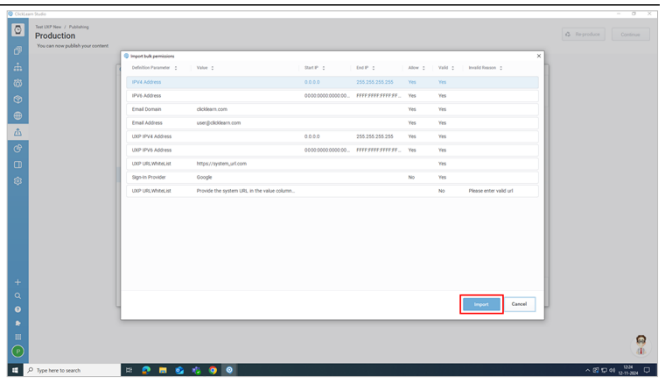
After downloading the files (**Excel** or **CSV**), fill in the information you wish to change.



Fill in the information according to your requirements and then **save it**.



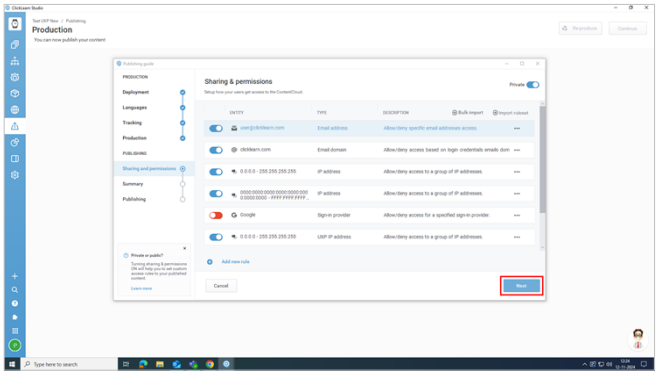
Click on the button **Import.**



Click on the button **Next.**

Make sure you produce and publish after adding it.

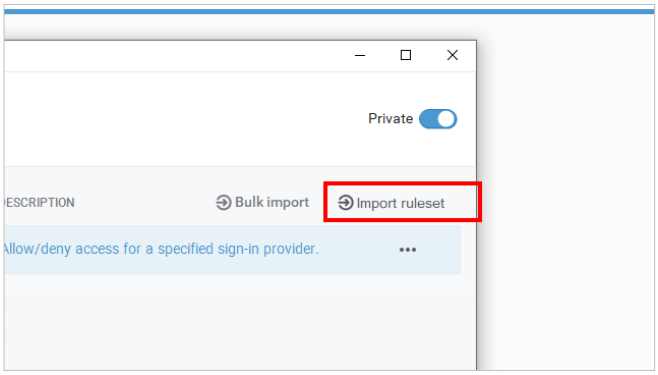
Tip: After completing a Bulk Import, make sure you Produce and Publish the updated version. Rules won't take effect until the content is re-published as an active version.



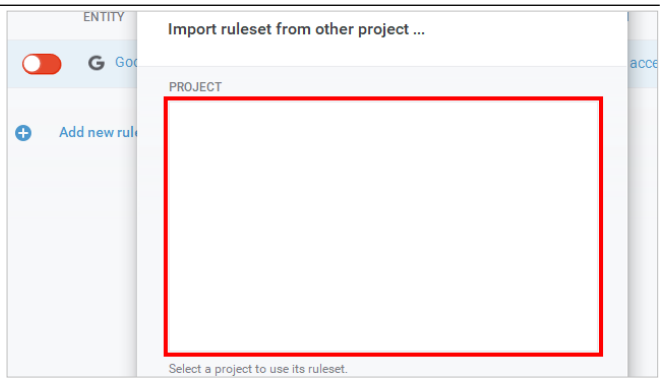
13.5.2. Import Ruleset

If you have already set up access rules in another project and want to reuse them here, you can import that ruleset instead of recreating it manually.

Click on the button **Import ruleset**

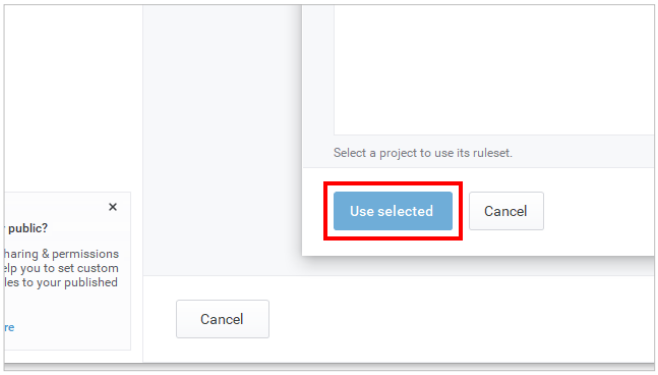


Select the **Project** to use the ruleset



Click on the button **Use selected**

The rules from that project will be applied to your current content.

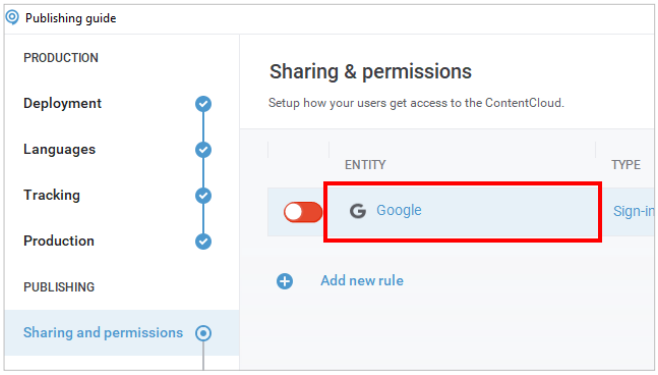


13.5.3. Publish private content

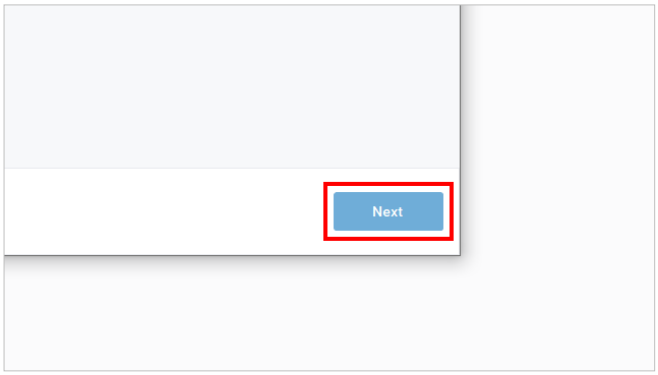
Once your rules are in place, you are ready to publish the content with access control active.

Click on the grid cell **ENTITY** with value

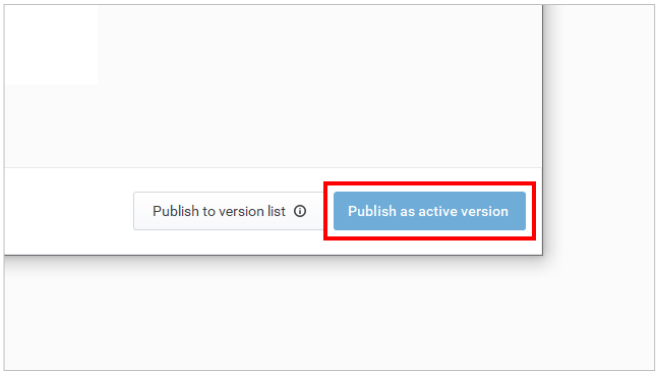
Select your content from the list



Click on the button **Next**

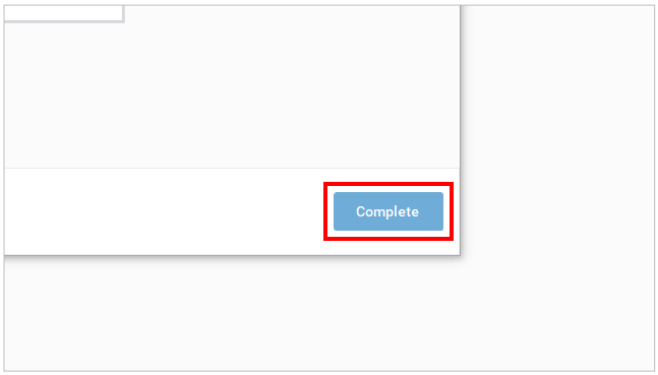


Click on the button **Publish as active version**



Click on the button **Complete**

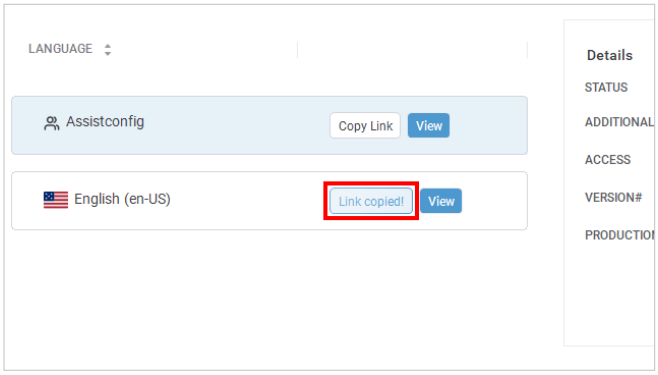
Your content is now live and access-controlled. Only users who meet the rules you defined will be able to view it.



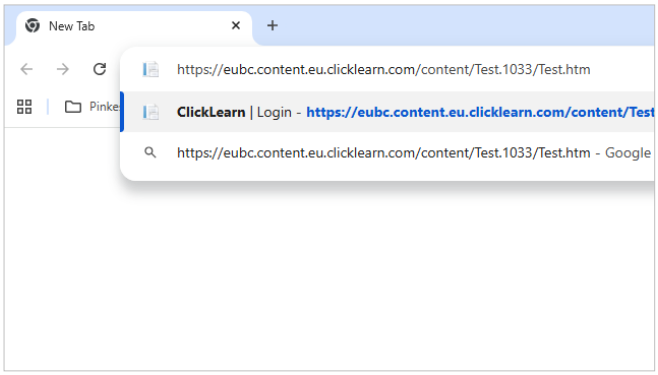
13.5.3.1. Verify Access is Working

After publishing, test that the rules are working correctly before sharing the link with your audience.

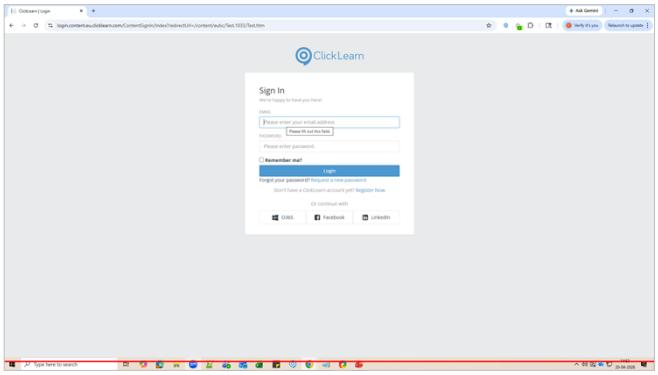
Click Copy link to **copy** your content link



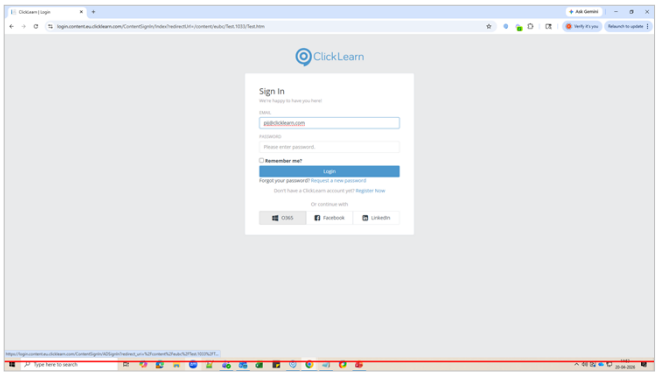
Open the link in a browser



Enter your email address and password when prompted



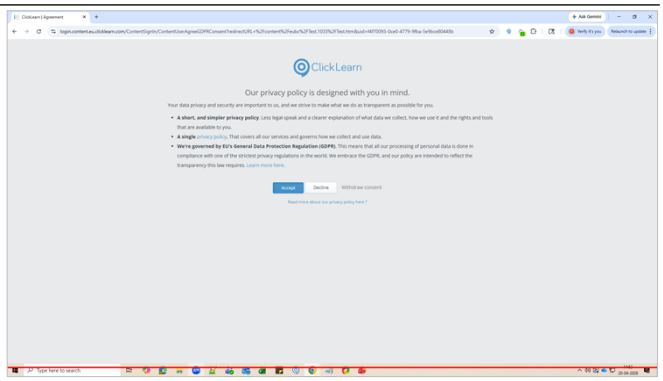
Select your **sign-in provider**, for example O365



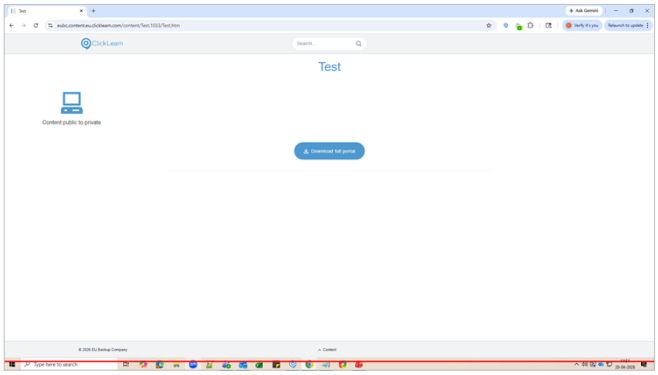
Click on the button **Accept**

Verify that access is either granted or denied based on the rule you set up.

If the result matches what you configured, your private content is set up correctly.



Click on the link **Test** to open the published content



13.6.Assist

13.6.1. Configure Assist for Windows Applications

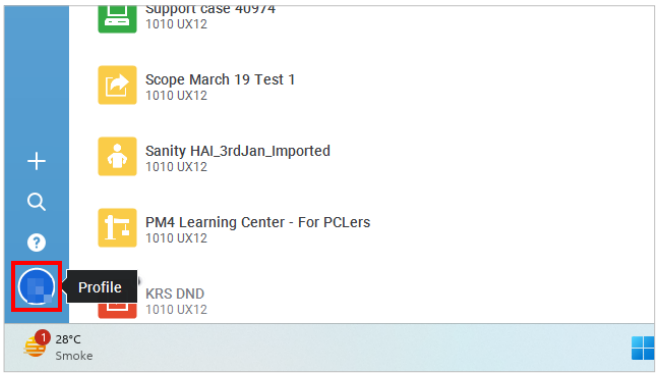
On-screen guidance for any Windows app, to install Assist, connect your content, and walk users through every step without leaving the application they're working in.

13.6.1.1. Installation

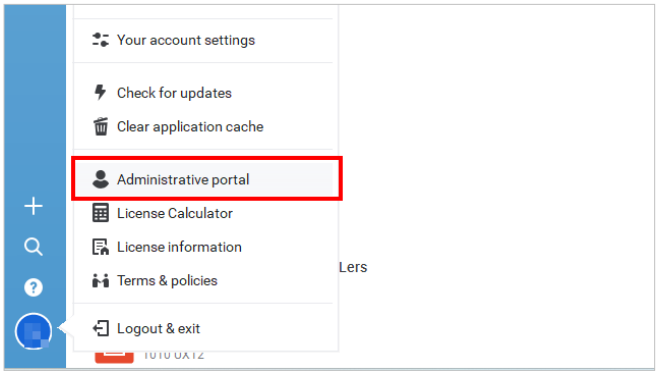
13.6.1.1.1. Assist MSI

To install the Assist MSI, follow the steps listed below.

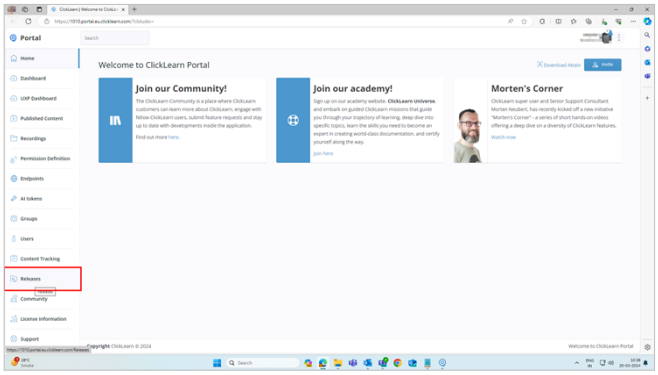
Click on the label **Profile**.



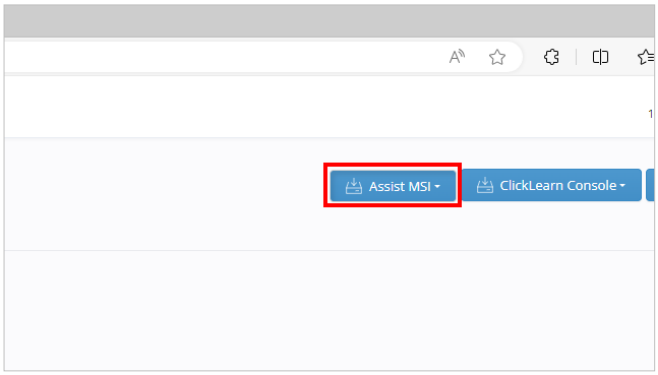
Click on the label **Administrative portal**.



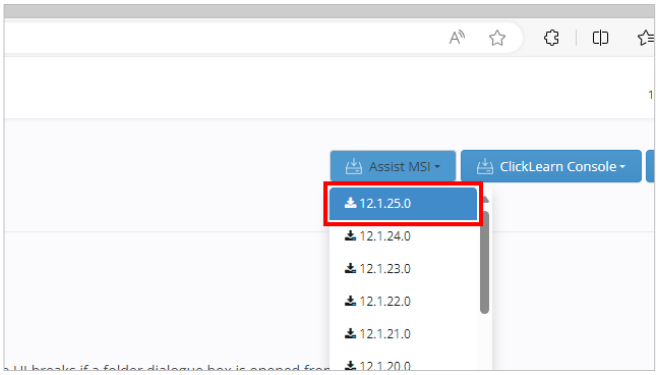
Click on the link **Releases**.



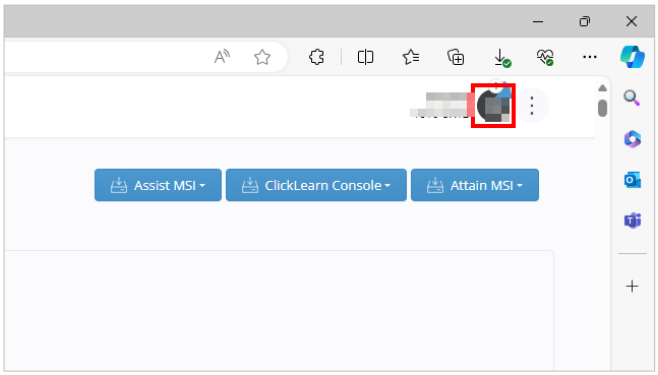
Click on the button **Assist MSI**.



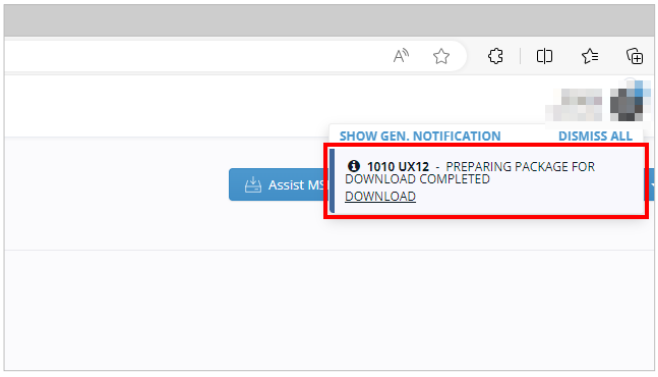
Click on the button for the latest version (**e.g., 12.1.25.0**).



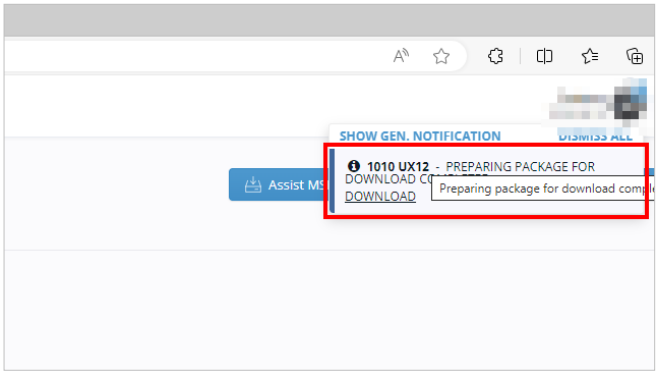
Click on the link.



It displays a message as **Preparing package for download**.

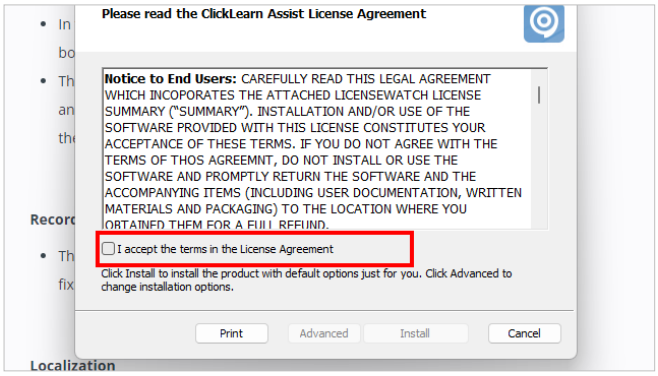


Once the package is ready, you can click on the **Download** button.

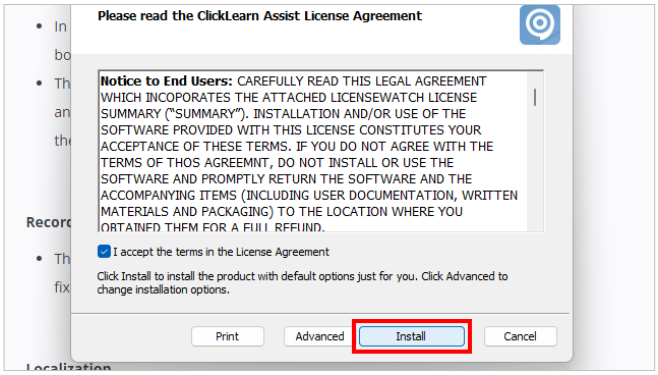


Open the downloaded folder and click on the instructions as prompted.

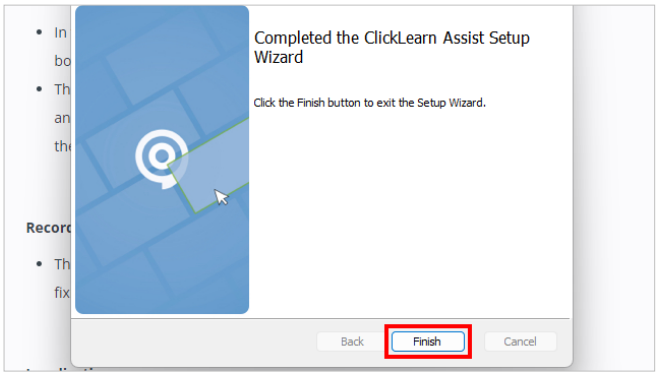
Click on the checkbox: **I accept the terms in the License Agreement**.



Click on the button **Install**.
You may also press **Alt+I**.



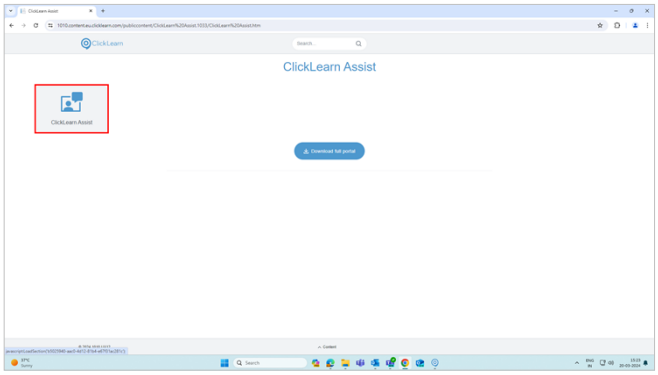
Click on the button **Finish**.
You may also press **Alt+F**.



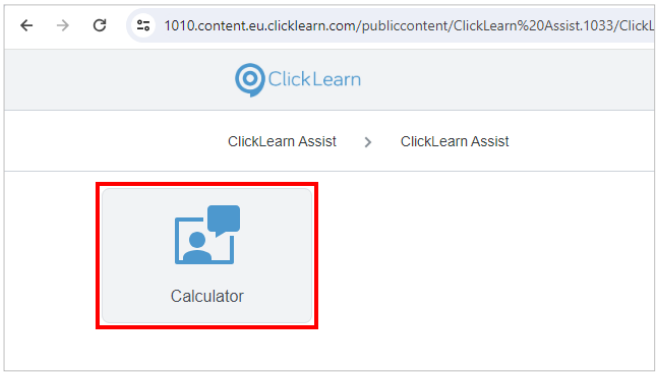
13.6.1.1.2. ClickLearn Assist

Copy and paste the produced content URL into the web browser and press enter.

Click on the link **ClickLearn Assist**.

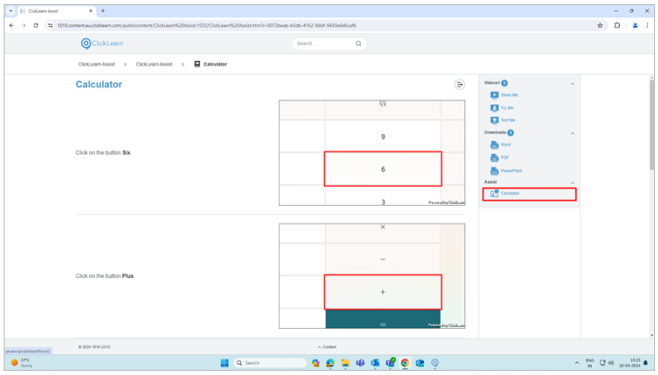


Click on the link **Calculator**.

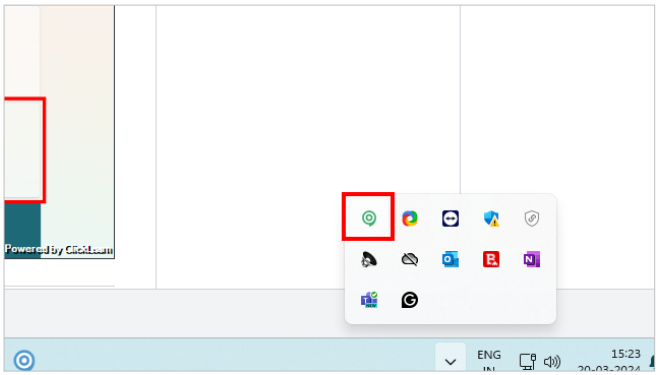


Click on the link **Calculator.**

This downloads the ClickLearn Assist application.

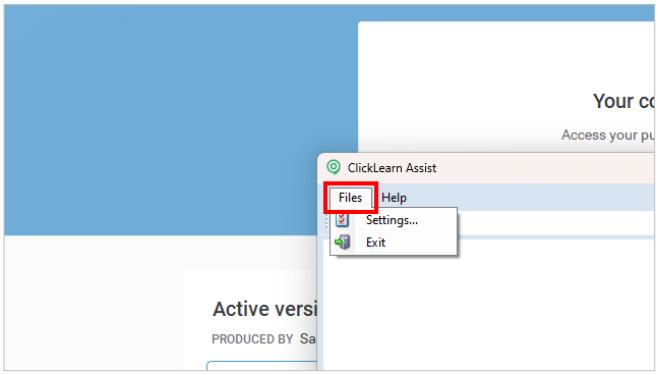


Click on the **ClickLearn Assist** icon that has now been added to the System Tray.

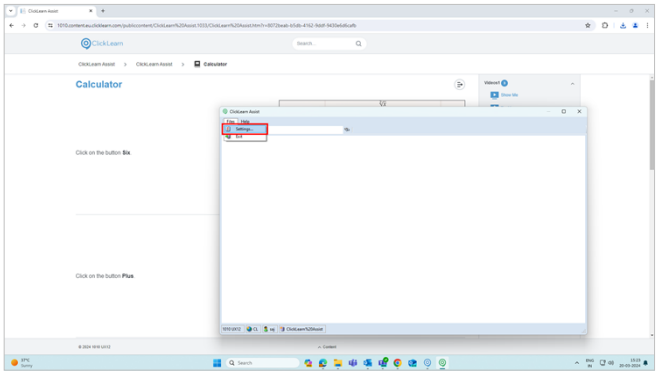


This opens up the ClickLearn Assist.

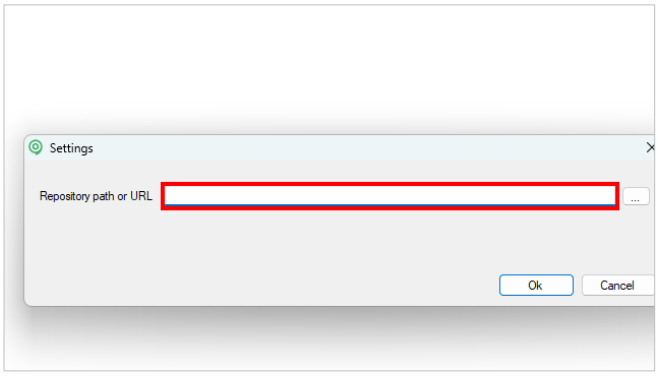
Double-click on the menu **File**.



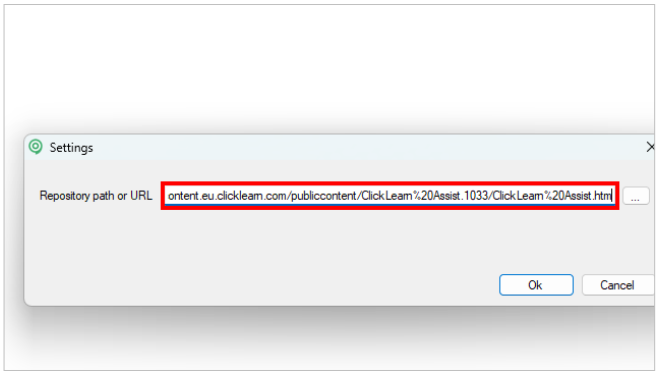
Click on the menu **Settings**.



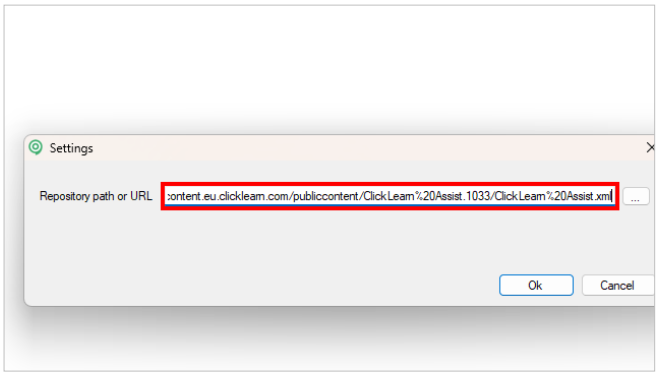
Click on the **Repository path or URL**.



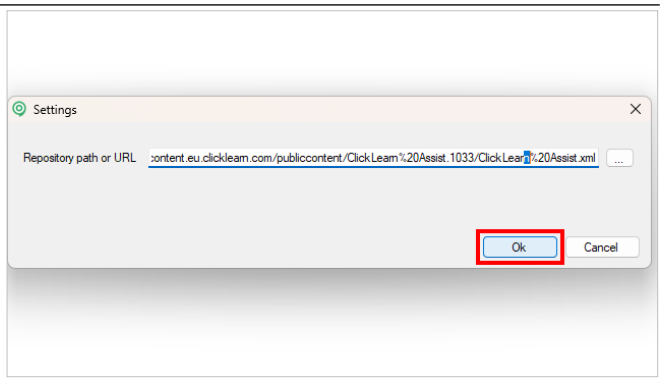
Copy and paste the published content URL. You can also press **CTRL+v**.



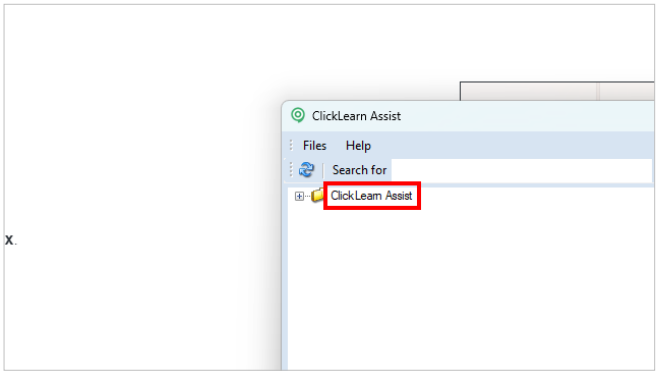
Repository path or URL: Change the content URL from **.htm to .xml.**



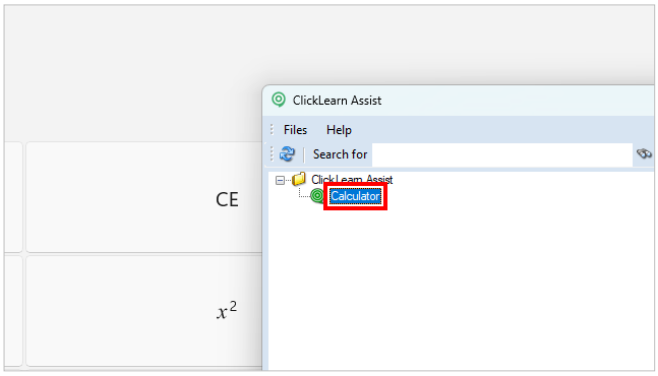
Click on the button **Ok**.
You may also press **Alt+O**.



Click on the folder **ClickLearn Assist**.

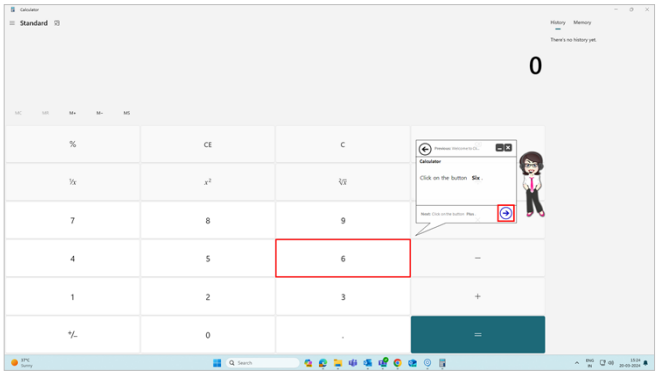


Double-click on the folder **Calculator**.



ClickLearn Assist now starts with each step included in the recording.

Click on the button **Next**.



13.6.2. Assist in ClickLearn Studio

Launch step-by-step guidance right inside the live application, so users are walked through a process as they work, from the start or any point you choose, without leaving the screen they're on.

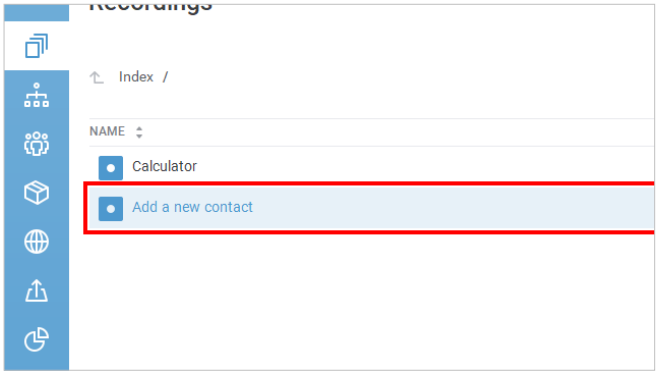
13.6.2.1. Introduction

ClickLearn Assist offers an interactive on-screen guidance system to facilitate users through their processes directly within the live environment.

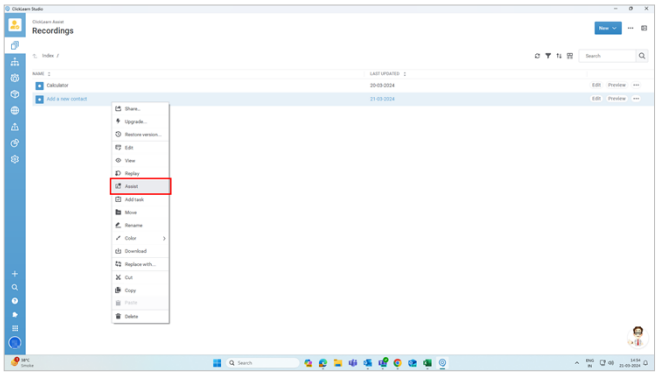
After recording your business processes in the system, you can initiate the Assist feature within the ClickLearn Studio for a seamless learning experience.

13.6.2.1.1. ClickLearn Assist

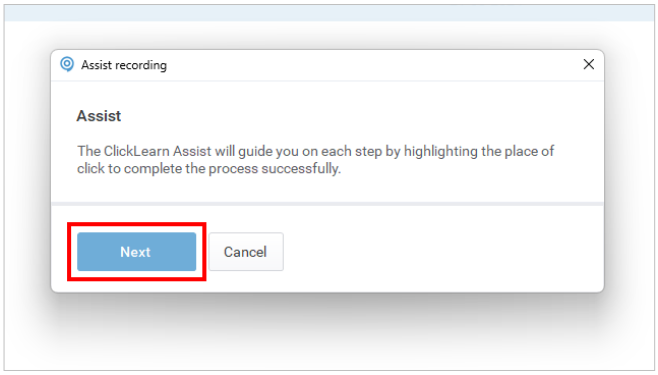
There are two ways in which you can start the ClickLearn Assist.
Right-click on the grid view cell **NAME** with data: **Add a new contact**.



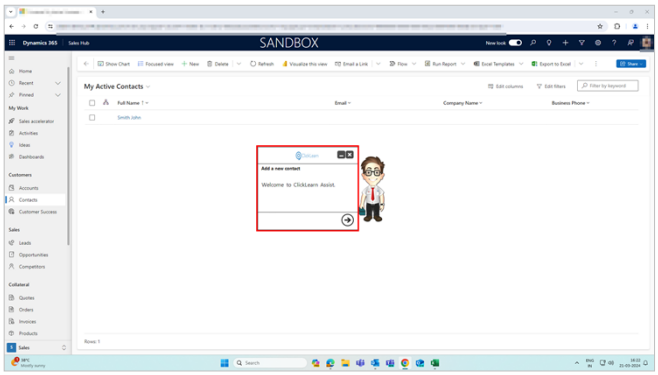
Click on the menu item **Assist**.



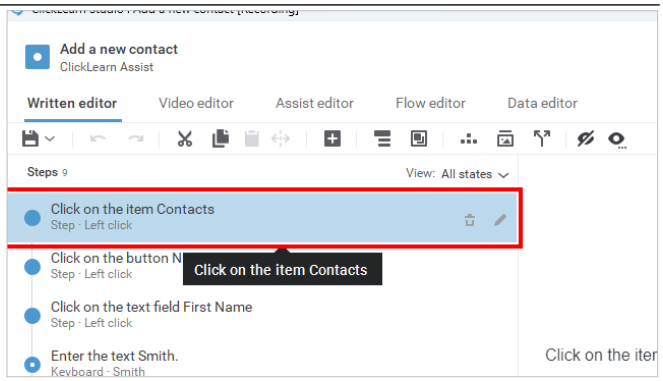
Click on the button **Next**.



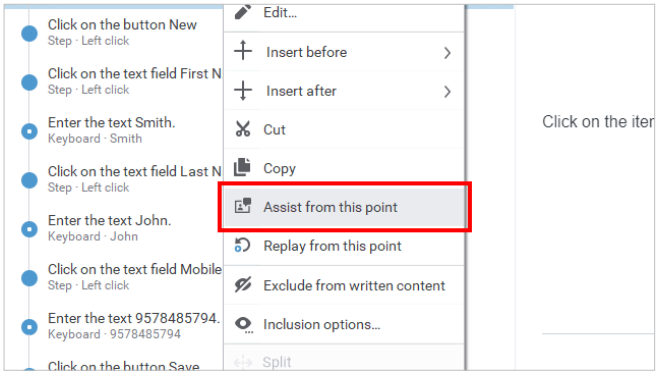
This starts the **ClickLearn Assist** in your application, guiding you through the complete steps.



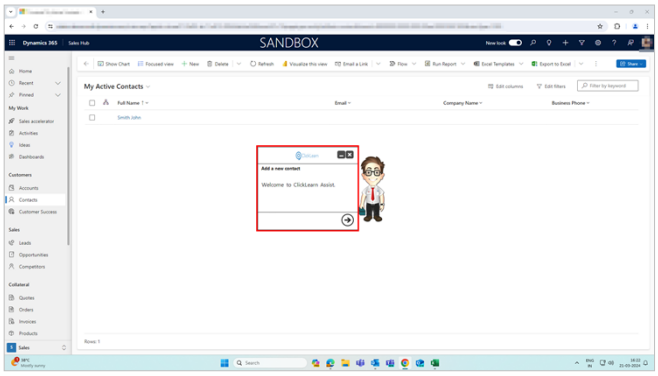
Another way to start the ClickLearn Assist is to open the recording you wish to begin the Assist for.
Right-click on the step: **Click on the item Contacts**.



Click on the menu item: **Assist from this point**.



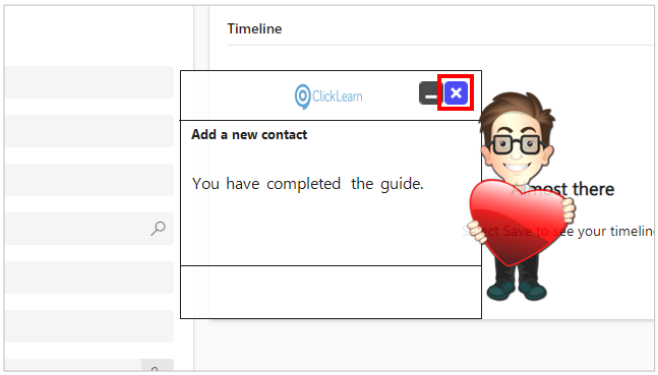
This starts the **ClickLearn Assist** in your application, guiding you through the complete steps.



Click on the button **Next**.
NOTE: You can proceed directly to the subsequent step based on your project's requirements.

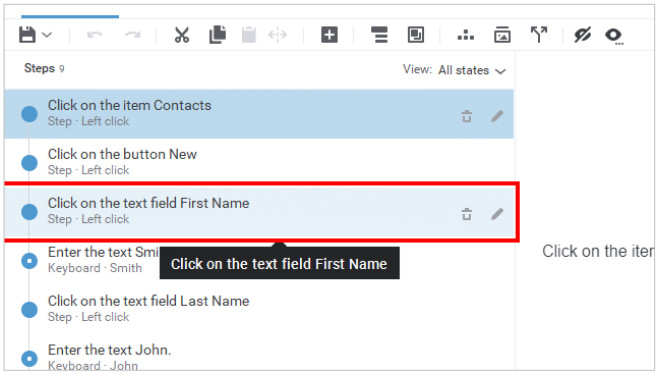
Once you complete all the recording steps, a message will appear indicating that you have finished the guide.

Click on the button **Close**.



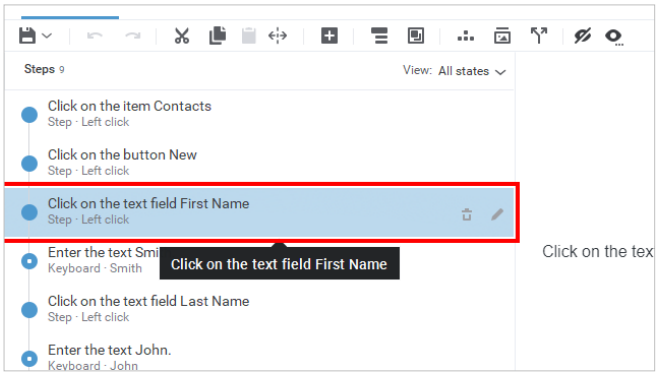
13.6.2.1.2. Assist from a specific point

You have the option to initiate the Assist from a chosen point.
Click on the step: **Click on the text field First Name**.

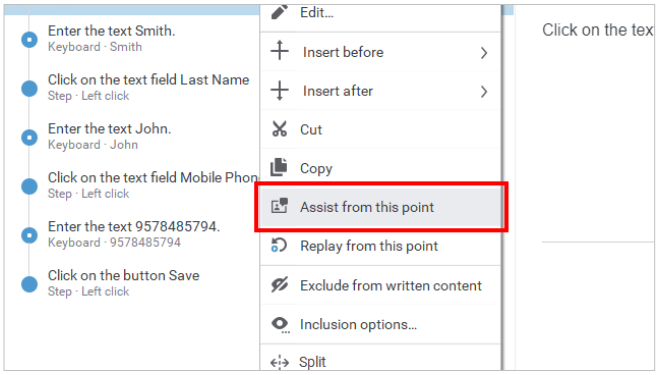


Right-click on the step from where you wish to start the Assist.

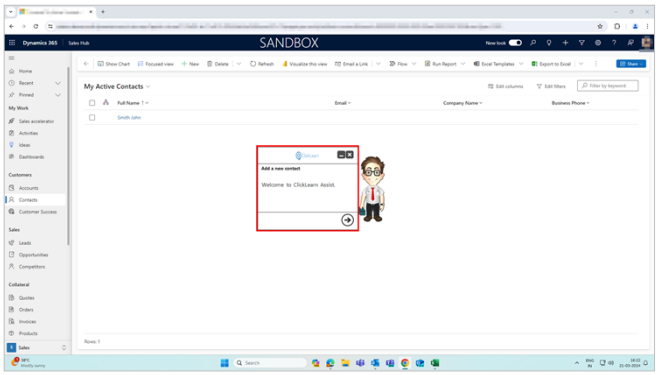
Right-click on the step: **Click on the text field First Name**.



Click on the menu item: **Assist from this point**.



This starts the **ClickLearn Assist** in your application, guiding you through the complete steps.



NOTE: Please note that users are required to choose between ClickLearn Assist and UXP for their operational needs. It is essential to understand that users cannot use these two functionalities simultaneously. Therefore, users can employ either ClickLearn Assist or UXP, but not both concurrently.

13.6.3. Configure Assist for Websites

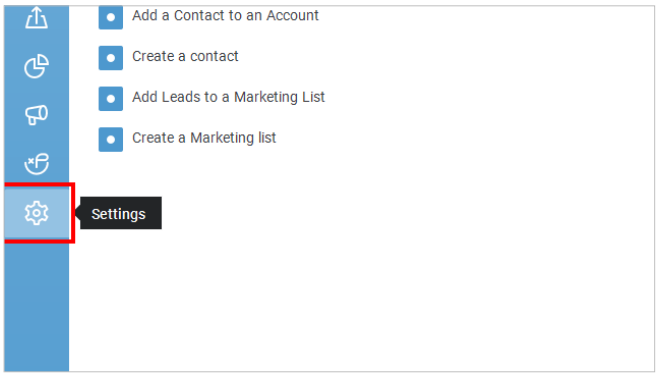
In-context guidance layered onto your website, to publish your project, configure Assist, and link your content so users get help right where they work without extra tools.

13.6.3.1. ClickLearn Assist for websites

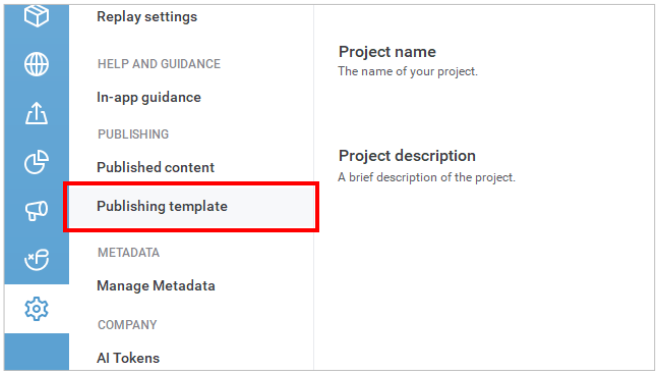
ClickLearn Assist for a website will help you guide directly within your website. This guide will help you publish your project, configure Assist, and make sure your published content is correctly linked and accessible.

13.6.3.1.1. Publishing Settings

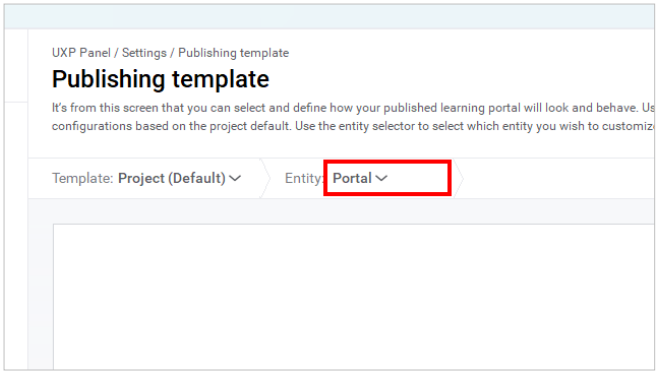
Click on the **Settings** button.



Click on the button **Publishing template**.

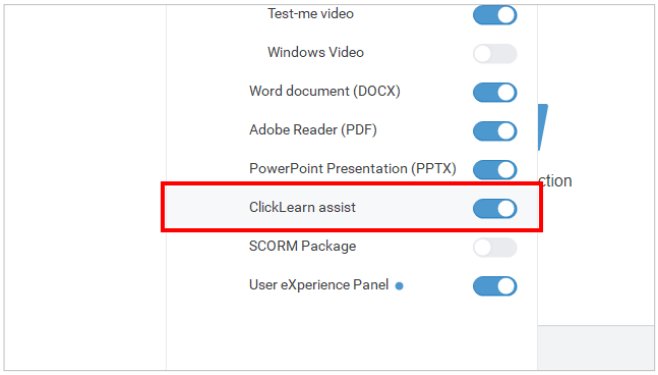


Click on the **Portal** button.

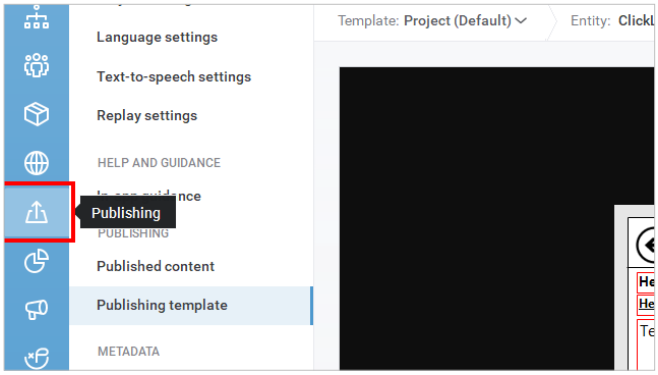


Click on the tree node: **ClickLearn assist**.

NOTE: Ensure the ClickLearn assist is enabled in the publishing template when using the Assist feature.

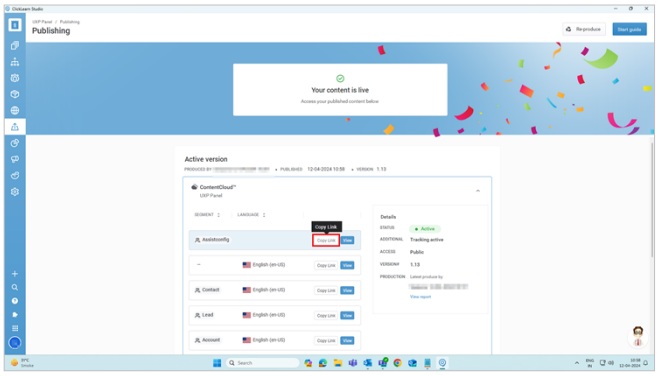


Click on the button **Publishing**.



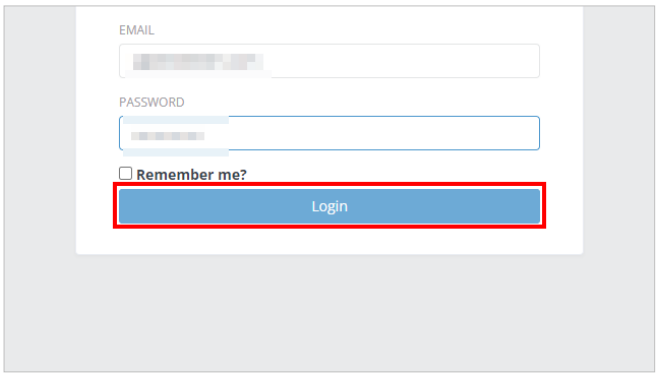
Once the project is published, you must configure published content URL using the Assist configuration link.

Click on the button **Copy Link** of grid cell **Action,** and paste the URL in the web browser, and press enter.



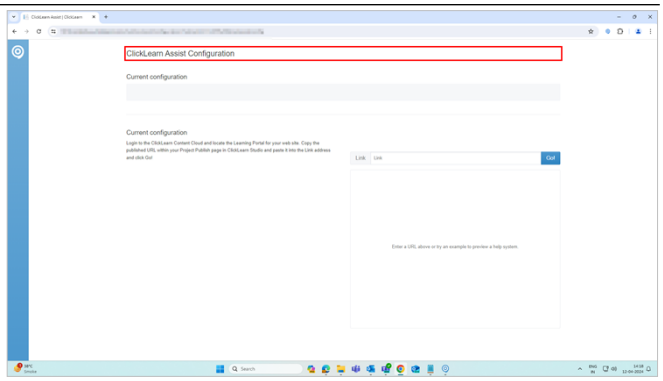
13.6.3.1.2. Assist Configuration

You will be prompted to Assist log in. Enter your credentials and click on the **Login** button.

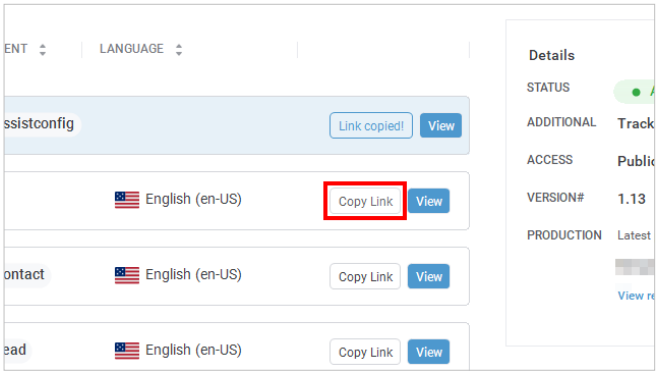


We need to configure the assist to ensure the published content URL works appropriately.

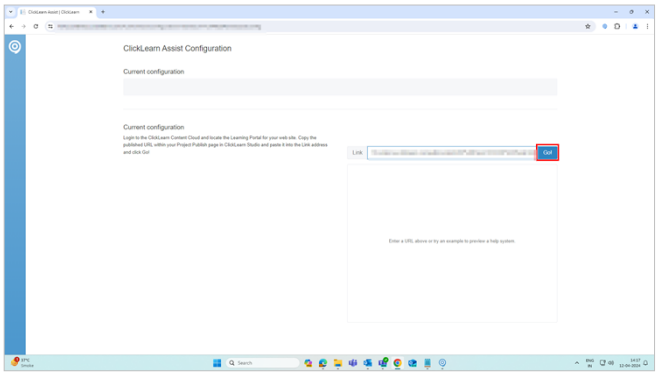
This screen indicates the **ClickLearn Assist Configuration** is missing.



Click on the button **Copy Link** of grid cell **Action in** publishing and go back to the assist configuration.

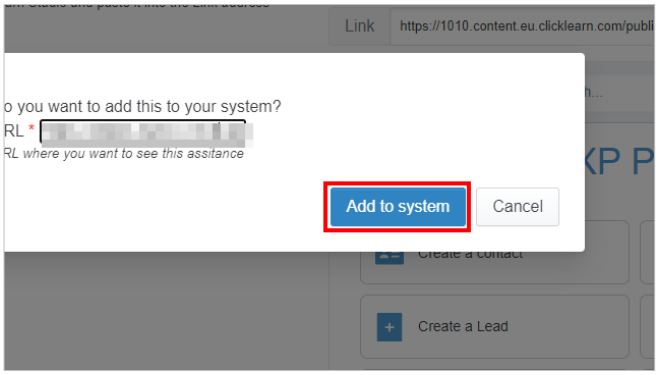


Click on the input field **Link**, paste the copied URL, and click on the button **Go!**



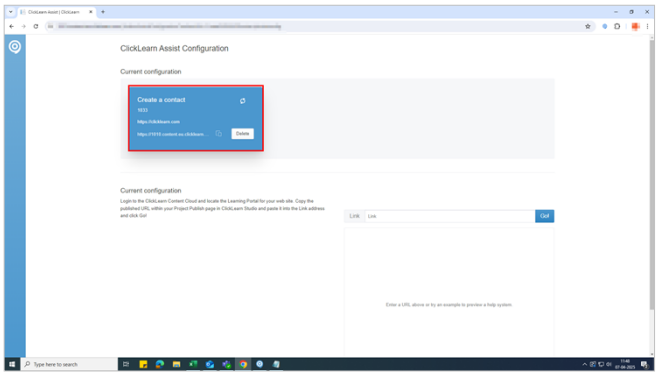
Enter the **URL** where you want to see the Assist.

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



This indicates that the Assist configuration is now complete.

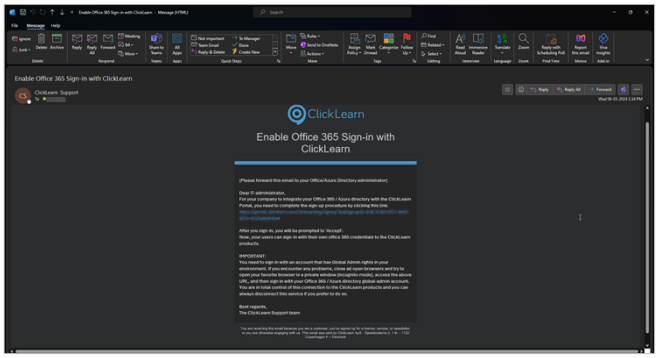
Note: - If you wish to change or update the Assist configuration in the future, you can repeat the steps above to reconfigure the Assist.



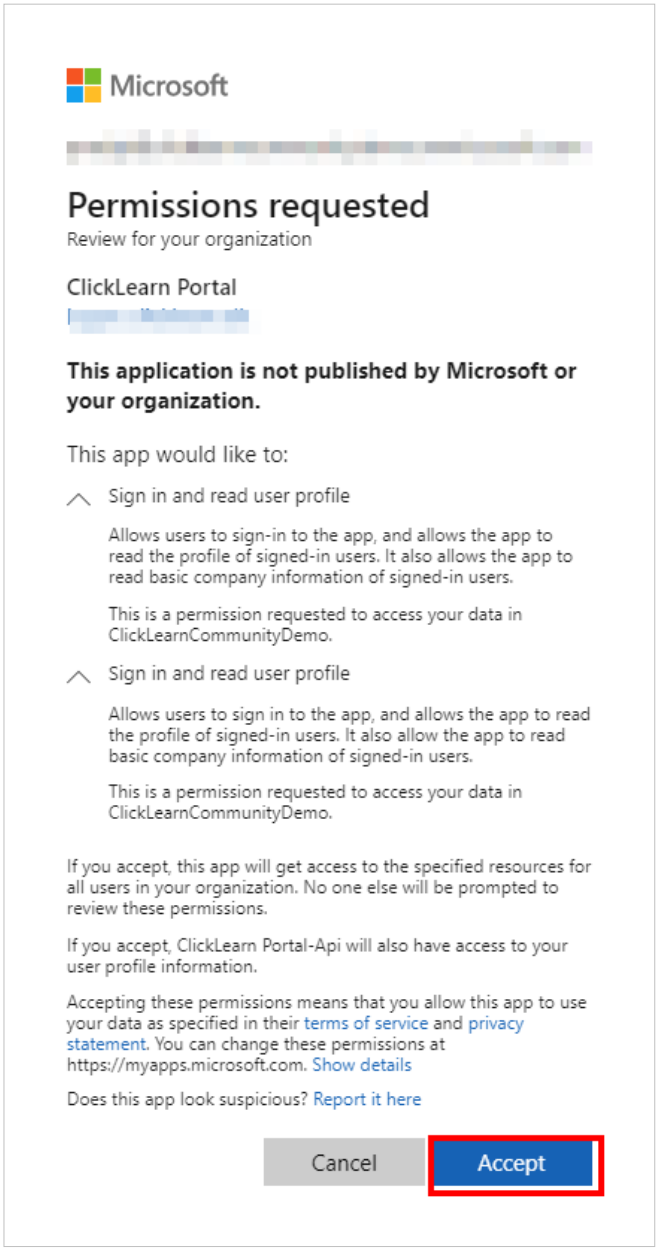
13.7.Enable Office 365 SSO for Content Users

One-click sign-in for your content users, to authorize access through Azure AD, publish with O365 SSO, and let users log in with their existing credentials without managing separate passwords.

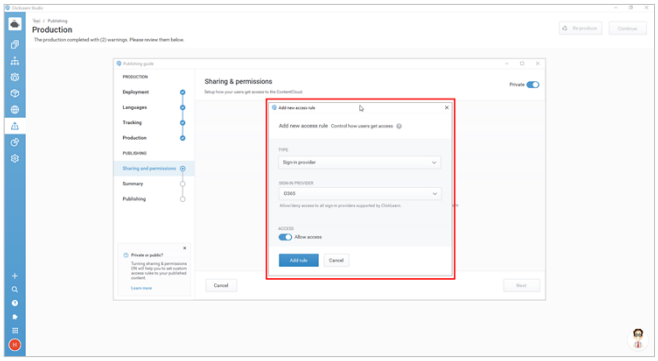
To enable O365 SSO, you should contact ClickLearn Support to receive a mail with the link. Forward the mail to your Azure AD administrator to grant access.



Upon clicking the URL, Azure AD will receive the below screen where they should "Accept" to proceed.



After receiving confirmation from the Azure AD administrator, please ensure the content is produced and published with SSO for 0365 added to it.



NOTE: The administrator requires authorization from the client to access user profiles, which include details like full name, email address, and organization name. Without this permission, users cannot log in via Single Sign-On (SSO). The MS graph provides the user profile data. The administrator grants consent for each user, making this a process that relies solely on administrative-level approval. Therefore, individual users cannot grant permission to log in from their AD without the AD Administrator first reviewing and approving the policy.

By approving, ClickLearn will create enterprise apps as below:

- ClickLearn Portal - For portal and studio access.
- Clicklearn Portal-Api - For content access.

13.8.Create an LMS Package

Your training packaged for any LMS, to generate SCORM or cmi5 files, set completion and scoring rules, and export courses for upload without rebuilding content for each platform.

13.8.1. Introduction

LMS means a **Learning Management System**, a centralized digital platform designed to host, deliver, and track your professional training and educational programs. As an end user, you can benefit from having a single point of access for all your learning materials, including interactive courses, videos, and assessments.

This system is built to manage your educational journey by automatically recording your progress, quiz scores, and certifications in real-time. It is important to know that the LMS serves as your official record of training, allowing you to pause your lessons and resume exactly where you left off.

By providing a structured environment for skill development, the LMS helps you stay compliant with industry standards while supporting your long-term career growth.

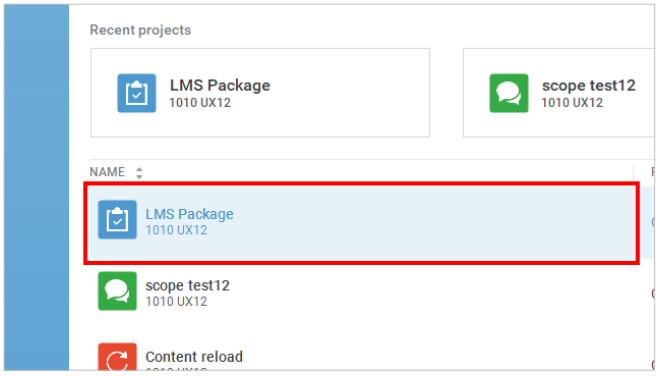
We support the following industry-standard formats:

- **SCORM 1.2**: The most widely used legacy standard. It is excellent for basic tracking of "Complete/Incomplete" status and single score results.
- **SCORM 2004 (3rd Edition)**: A more advanced version of SCORM that allows for sequencing (the ability to lock or unlock lessons based on your performance) and provides more detailed data interaction.
- **cmi5**: Often called "xAPI with rules," this is the most modern standard. It is designed for the mobile age, allowing for more flexible, secure, and robust tracking of learning experiences both inside and outside the browser.

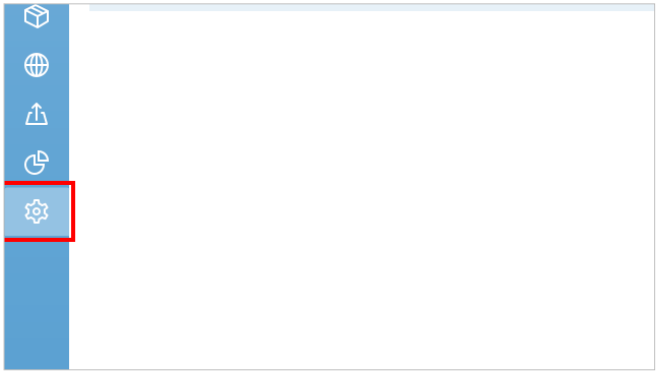
13.8.2. Steps to Enable the LMS Package

Choose the project you want to generate the LMS package for.

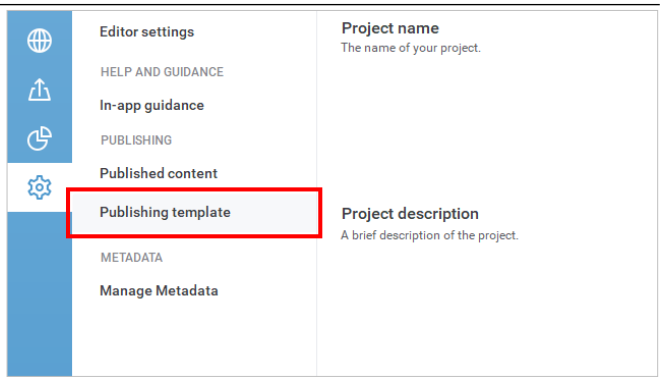
Double click on the grid cell **NAME** with value **LMS Package**



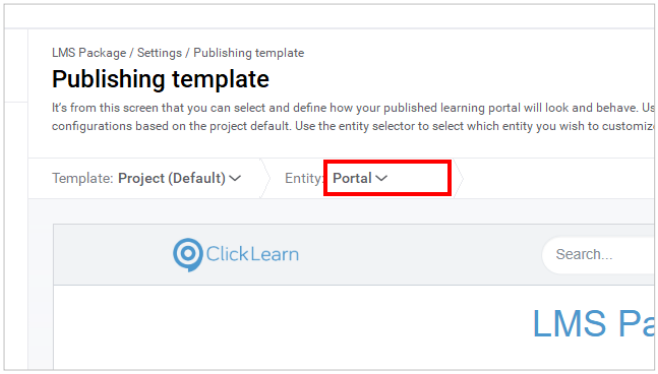
To enable the SCORM package option, click on the **Settings** button.



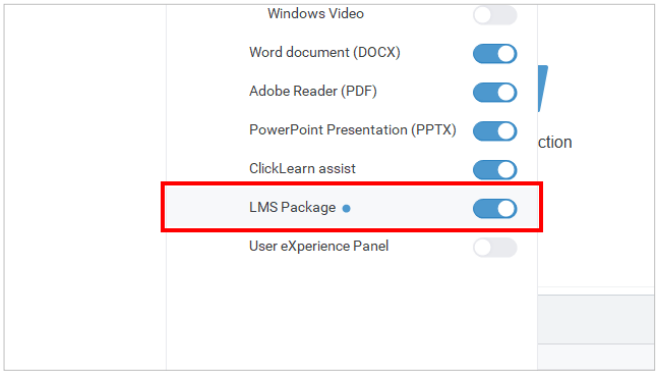
Click on the button **Publishing template**



Click on the button **Portal**

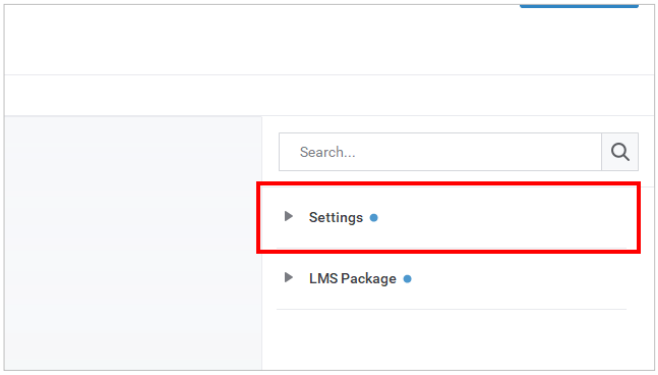


Click on the toggle switch of the tree node **LMS Package**.

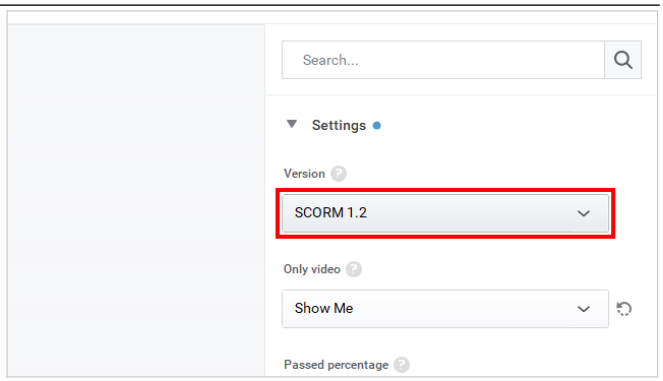


13.8.2.1. Settings

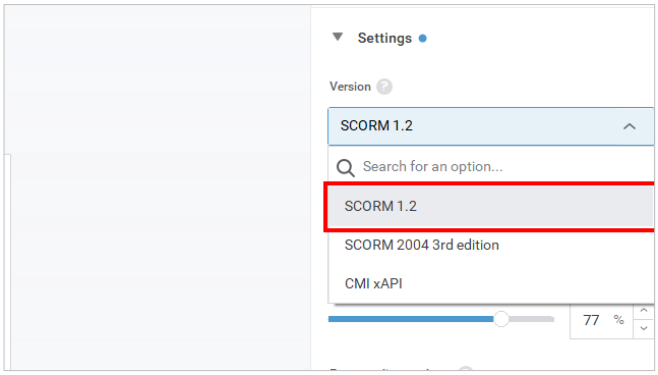
Click on the collapsible panel **Settings** toggle button.



Click on the dropdown **scorm-version**

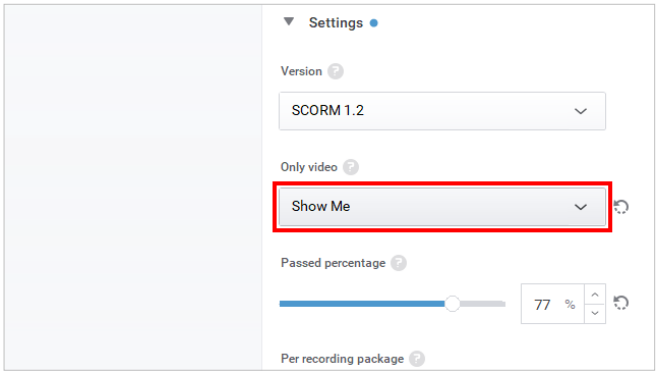


From the version dropdown list, you can select the LMS version compatible with your LMS.

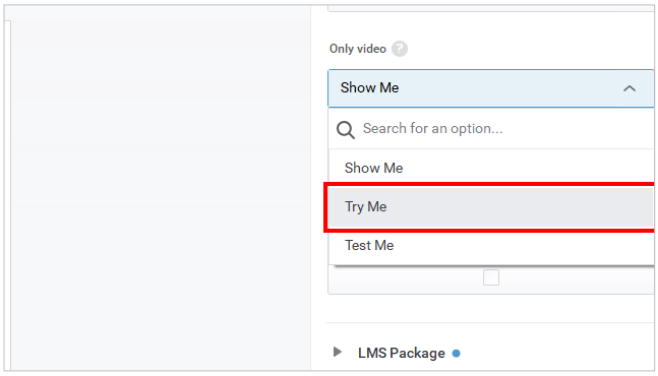


Click on the panel **Only video**.

Note: If this is not selected, the standard content page will appear, providing a full interactive layout including text and navigation.

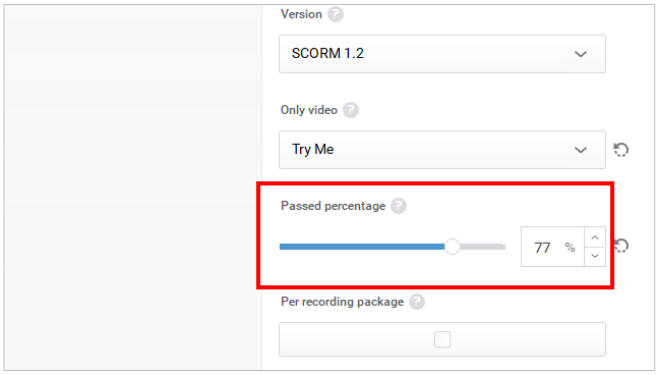


Select the options that best suit your project's needs from the dropdown menu.



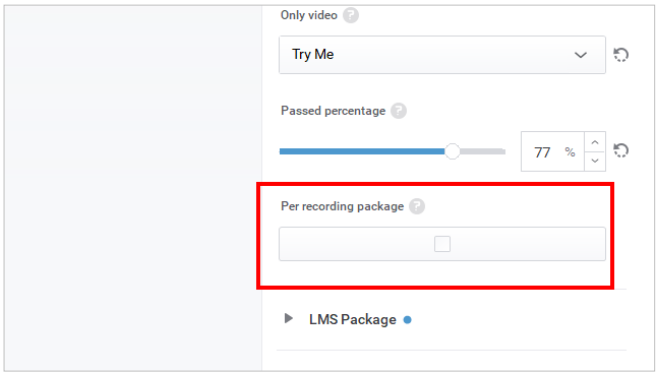
Click on the panel **passed percentage**.

The minimum score required for a learner to pass. This is calculated based on the percentage of correct clicks throughout the lesson. For feedback sections, the user's rating will generate this percentage.



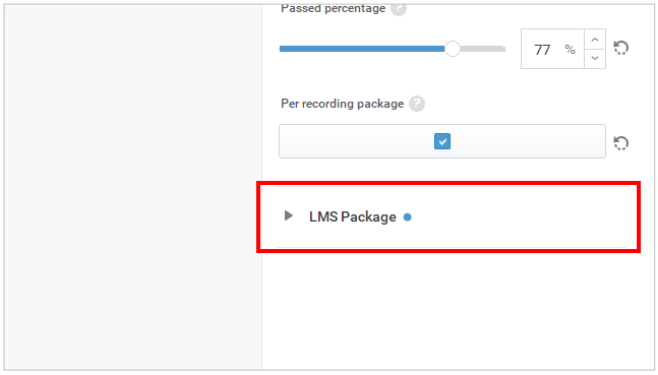
Click on the panel **Per recording package**

This generates a separate, individual package for each recording in your structure instead of a single file for the entire portal.



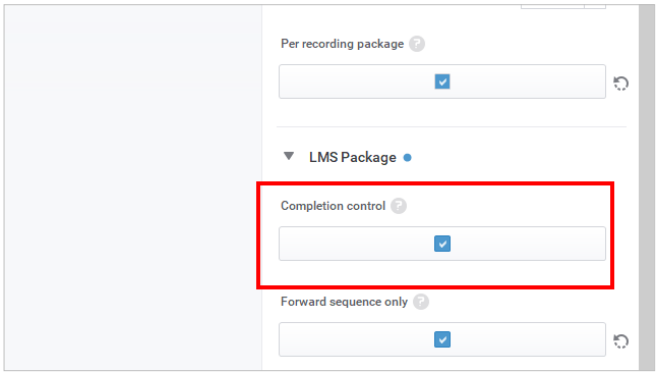
13.8.2.2. LMS Package

Click on the collapsible panel **LMS Package**



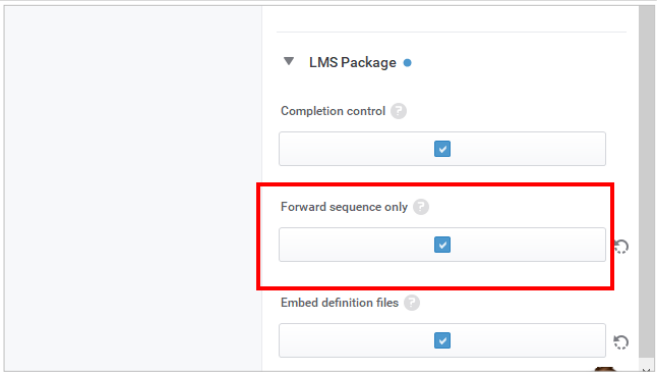
Click on the panel **Completion control**

A tracking feature that automatically notifies the LMS the moment an end-user successfully completes a specific section.



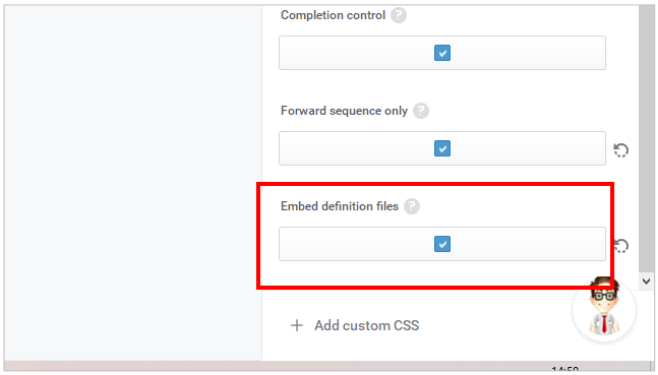
Click on the panel **Forward sequence only**

A navigation restriction that requires users to move through the table of contents in order, preventing them from skipping ahead.

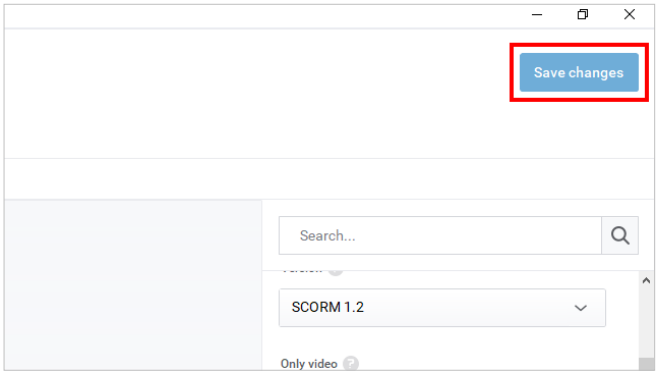


Click on the panel **Embed definition files**

A compatibility setting that includes XSD definition files directly within the package. This is used for LMS platforms that block external file requests.

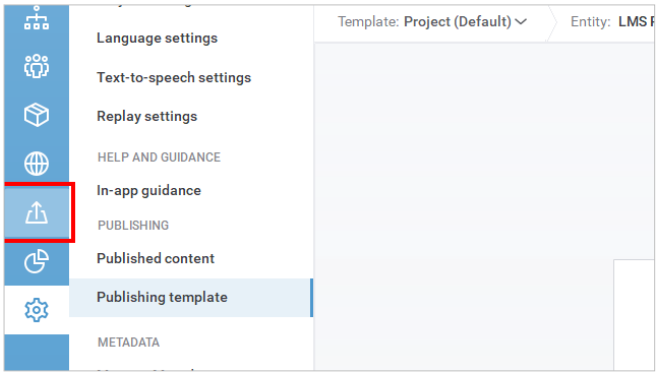


Click on the button **Save changes**

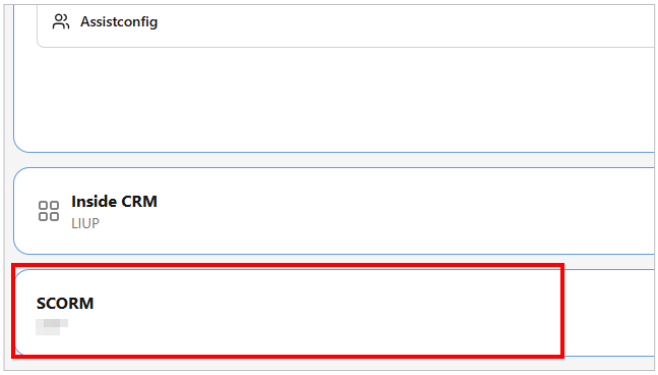


To successfully deploy your content on the LMS Cloud platform, producing and publishing your project is essential.

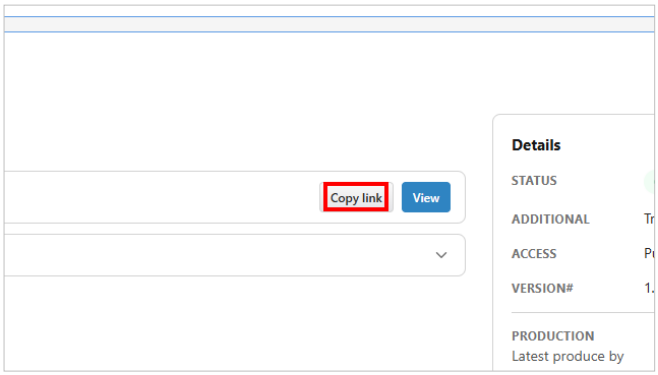
To accomplish this, navigate to the **Publishing section** and follow the steps to produce and publish your project.



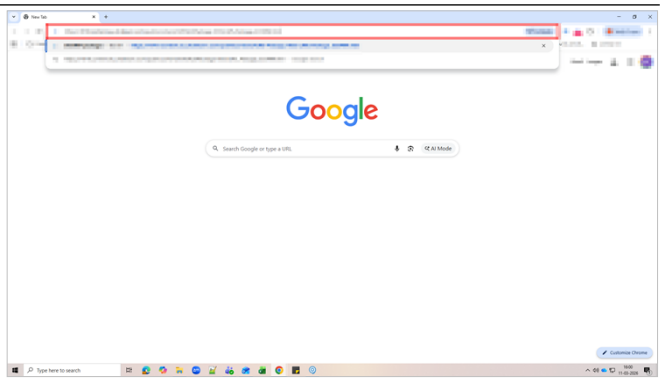
Click on the button **SCORM**.



Click on **Copy link**.

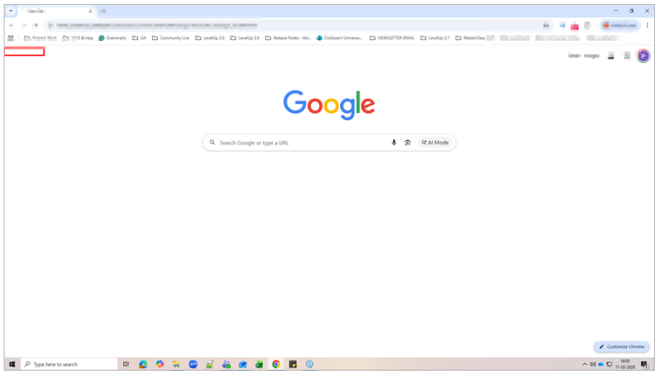


Open the browser and paste the copied URL into the browser's address bar.



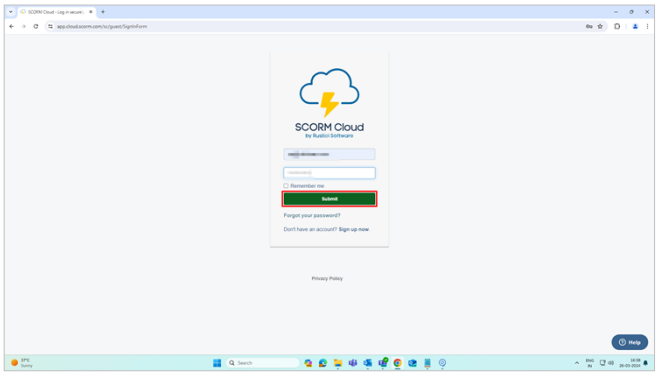
This opens up a new window with the link of the LMS package.

Click on the link **lms_package** to download the zip file.

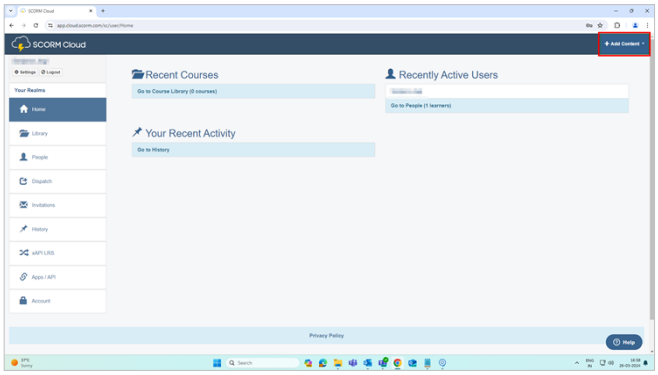


Once the zip file is downloaded, go to the SCORM cloud in the browser.

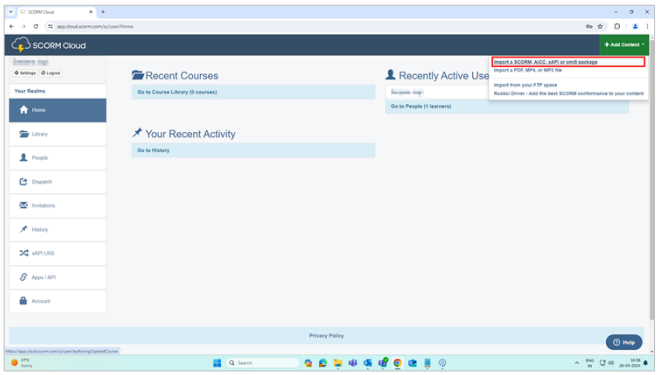
Enter the credentials and click on the button **Submit**.



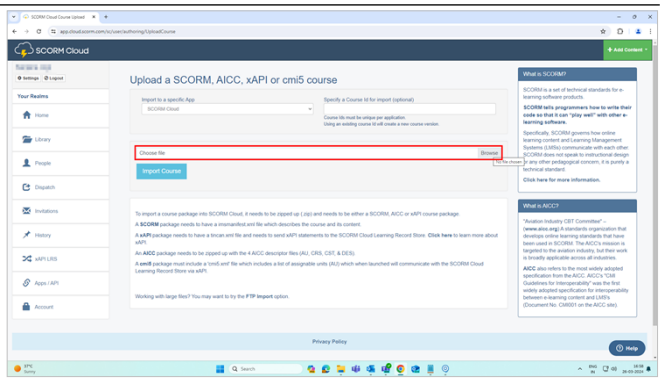
Click on the button **Add Content**.



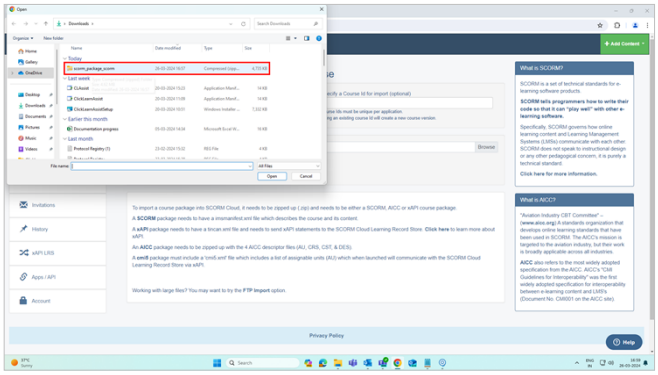
Click on the link: **Import a SCORM, AICC, xAPI, or cmi5 package** from the dropdown list.



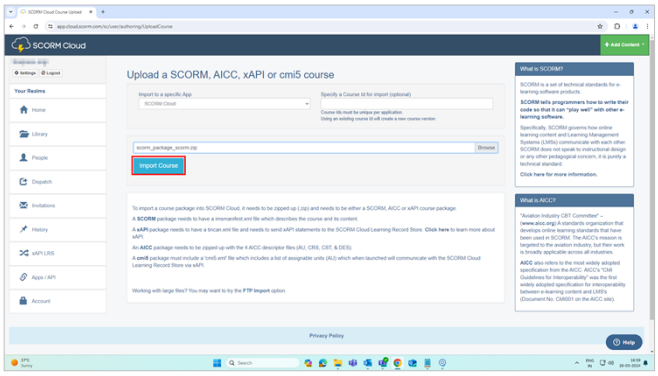
Click on the file field, **Choose file**, and navigate to the location where you saved the zip file.



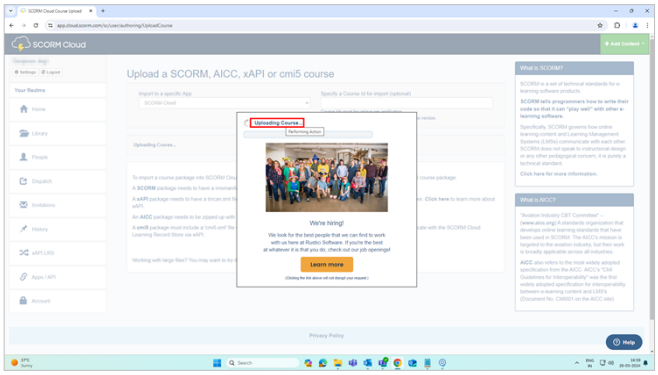
Choose file: Choose the zip file.



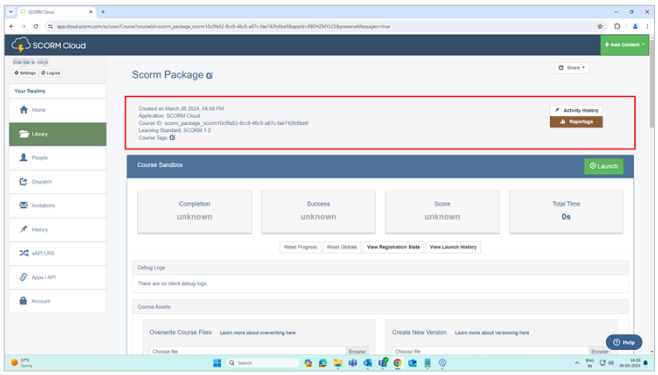
Click on the button **Import Course**.



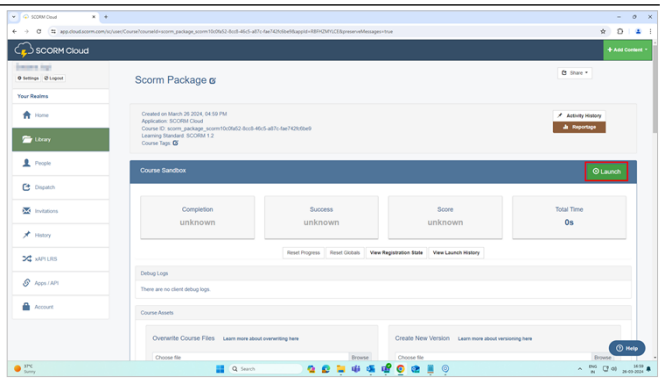
Uploading Course: The course starts uploading, and the status is displayed in a new window.



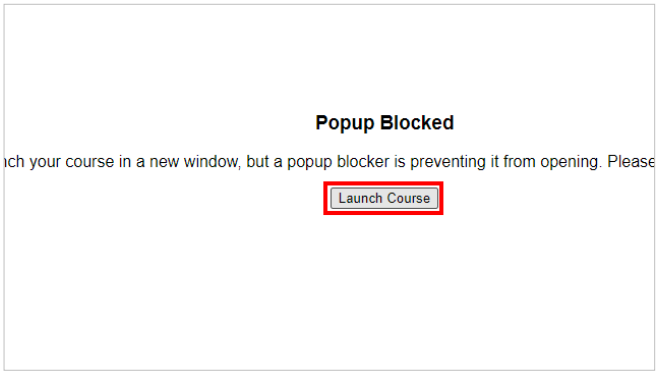
Once the course upload is complete, the following screen displays the uploaded course details.



Click the **Launch** button to open the uploaded course in a new window.



Click on the button **Launch Course**.



13.9.Use a Brand Font on the Learning Portal

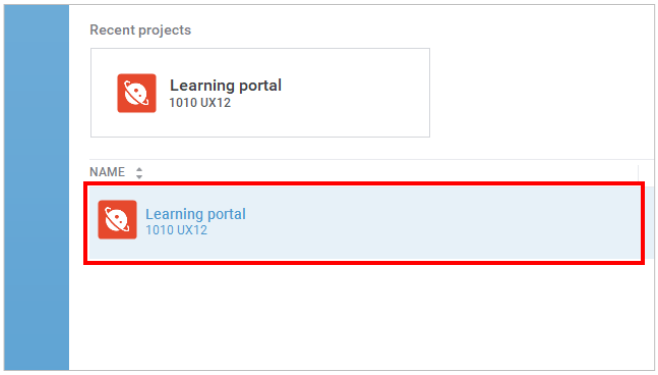
Your brand's look across the whole portal, to upload your font, add a little custom CSS, and publish so every page matches your identity without touching the core design.

13.9.1. Introduction

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

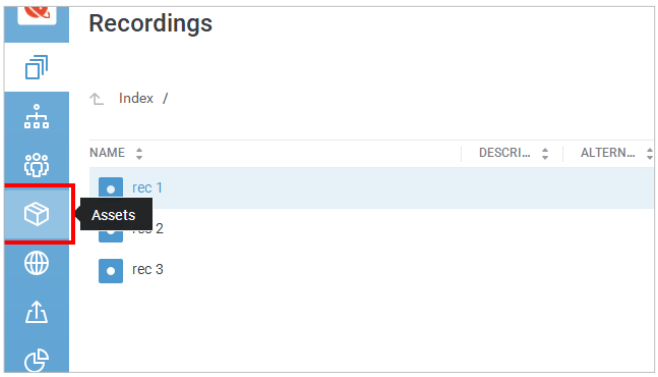
13.9.2. Procedure

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

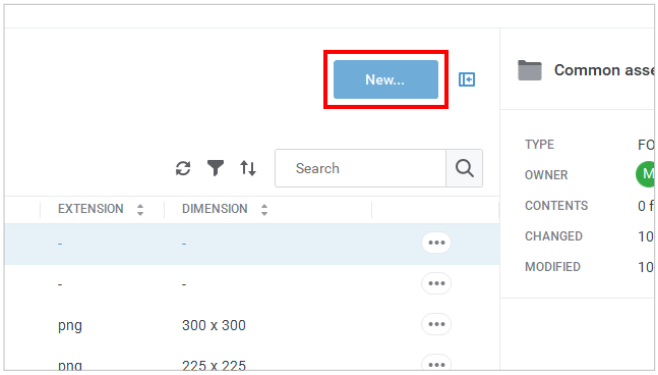


13.9.2.1. Create a folder by name 'redist' in assets to add font file there

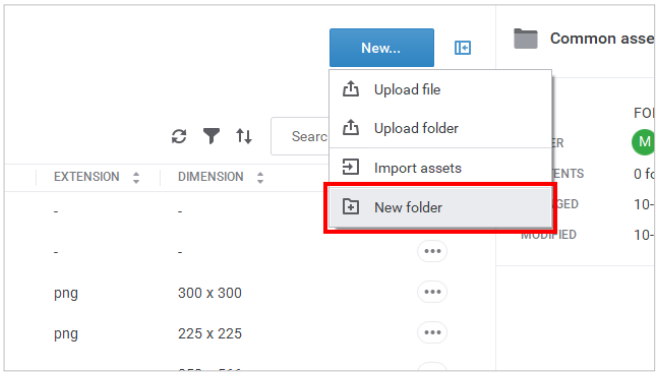
Click on the button **Assets**



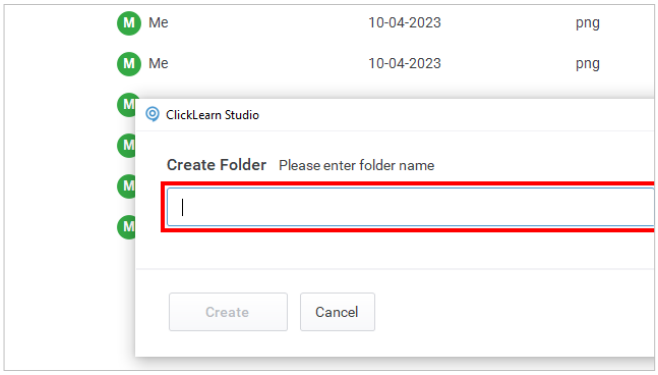
Click on the button **New...**



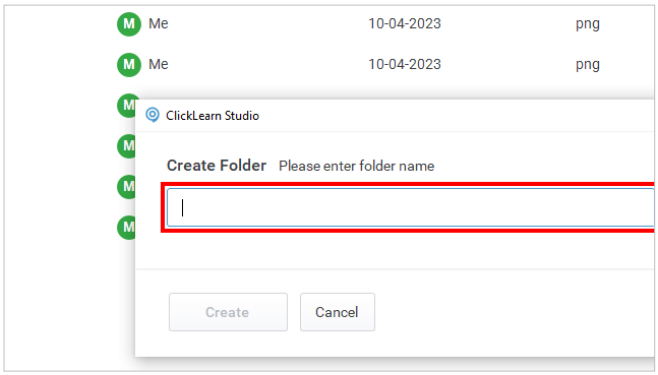
Click on the menu item **New folder**



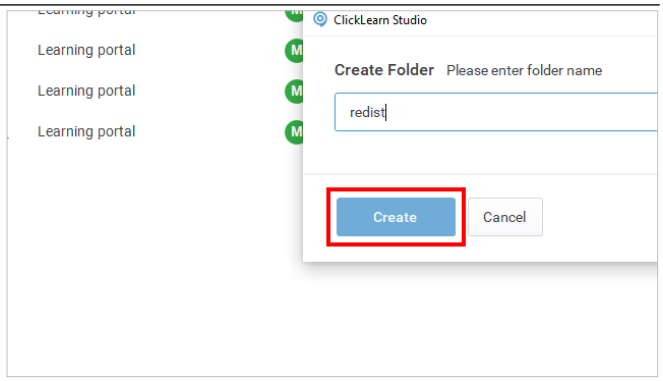
Click on the textbox **Name**



Enter **Name**.

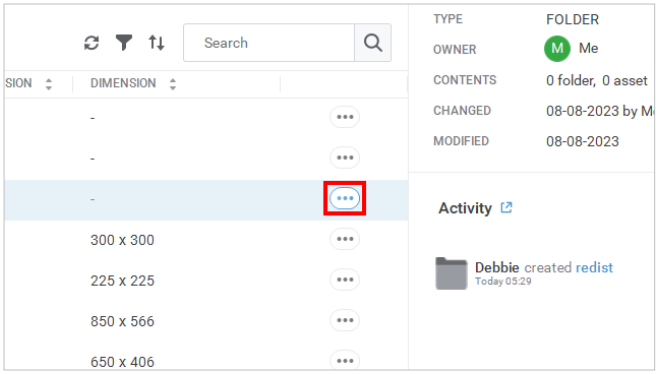


Click on the button **Create**

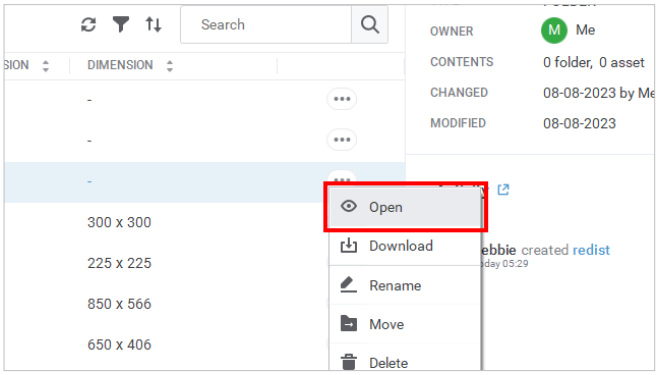


13.9.2.1.1. Add font file in redist folder

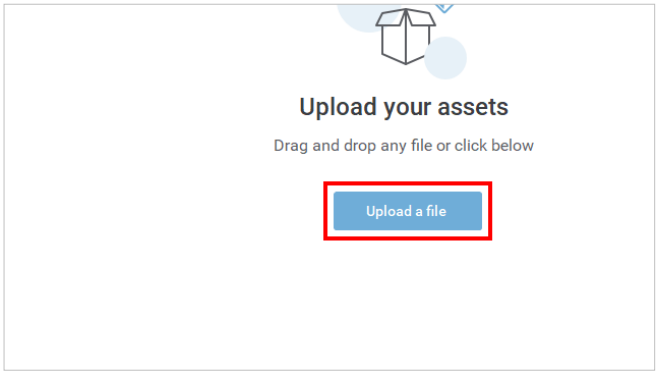
Click on the button **More** of grid cell **Action**



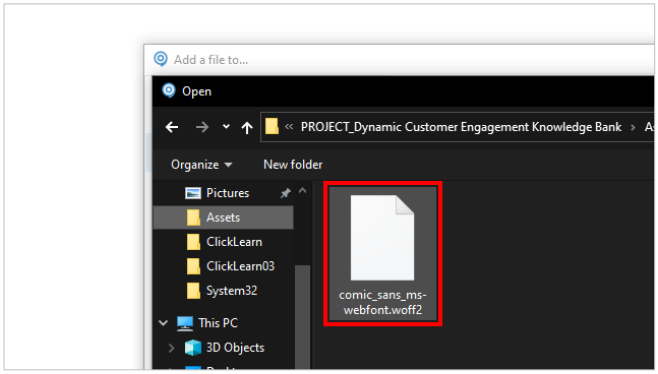
Click on the menu item **Open**



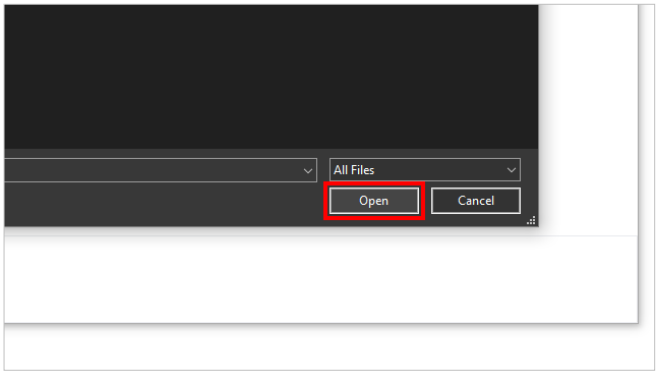
Click on the button **Upload a file**



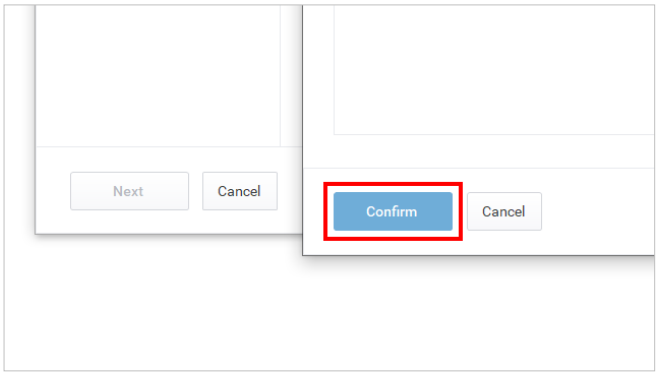
Click on the list element **comic_sans_ms-webfont.woff2**.
In your case it would be your brand font.

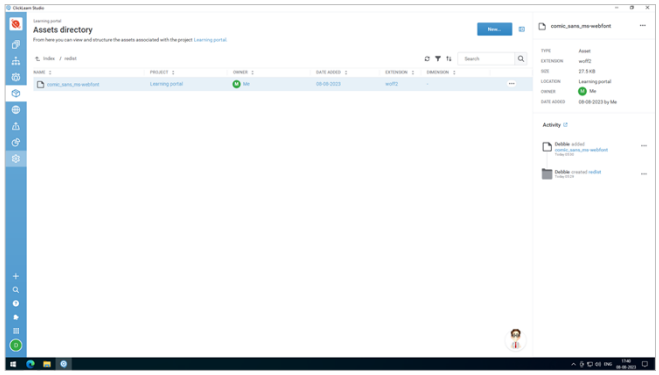


Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **Confirm**





Redist folder should look like this

13.9.2.2. Custom CSS

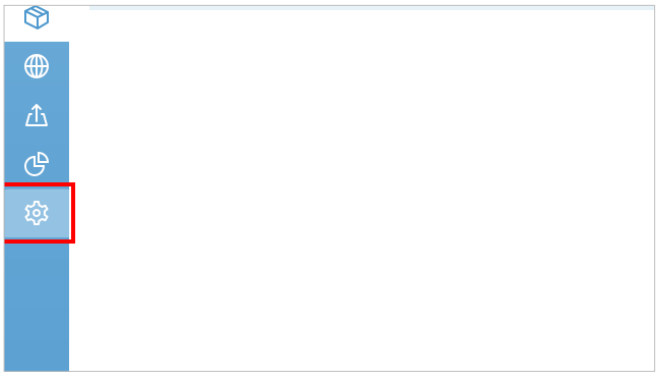
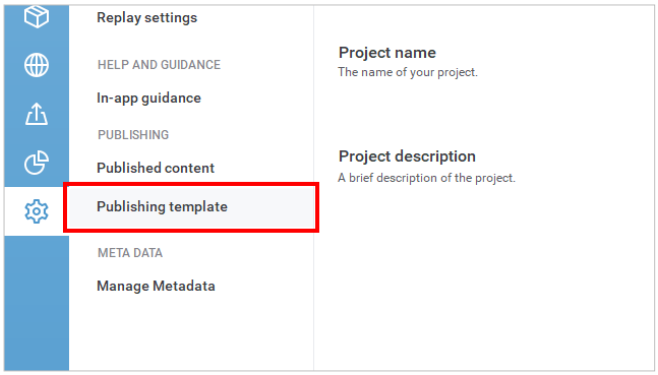
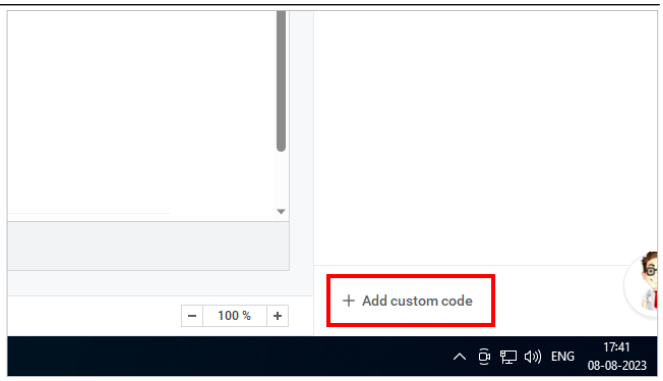
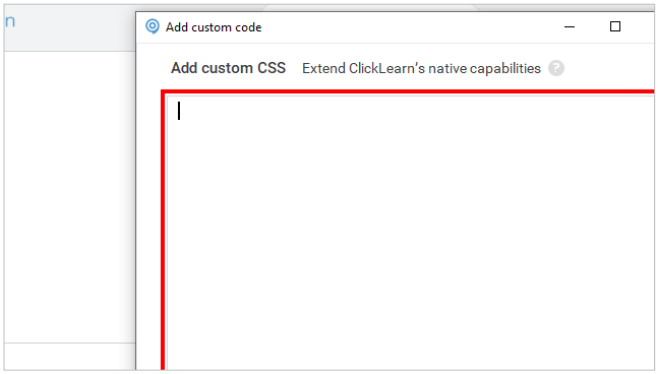
13.9.2.2.1. Format css

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.

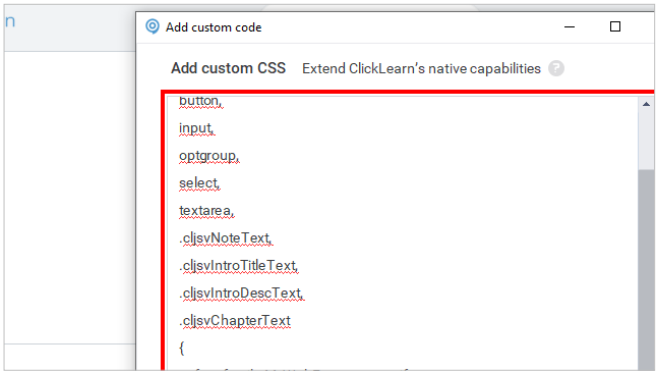
@font-face { font-family: 'MyWebFont'; src: url('**comic_sans_ms-webfont.woff2**') format('**woff2**');}
body,
button,
input,
optgroup,
select,
textarea,
.cljsvNoteText,
.cljsvIntroTitleText,
.cljsvIntroDescText,
.cljsvChapterText
{
font-family:MyWebFont,sans-serif;

}

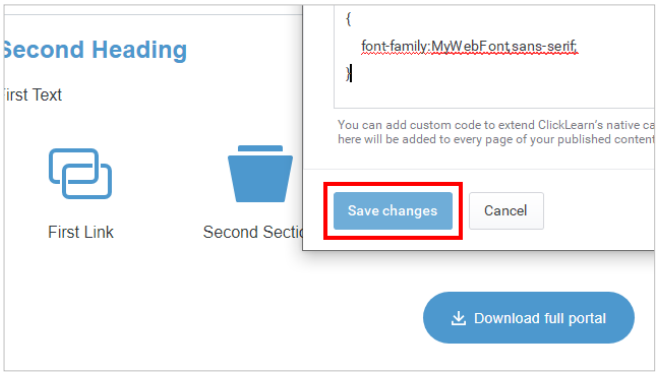
13.9.2.2.2. Add custom css

Click on the button **Settings**	
Click on the button **Publishing template**	
Click on the button **Add custom code**	
Click on the text editor	

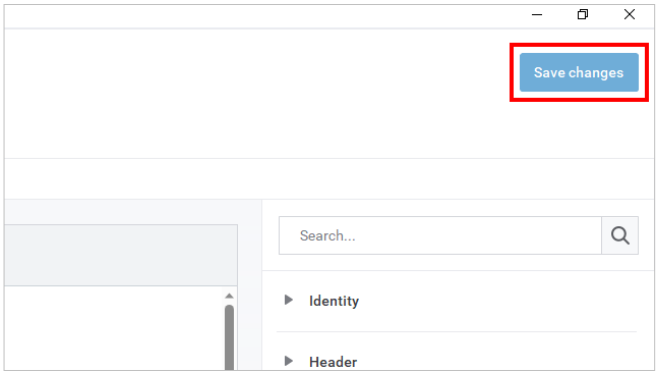
Enter the attached css code.



Click on the button **Save changes**



Click on the button **Save changes**



13.9.3. PS

Produce and publish your content to see the changes.

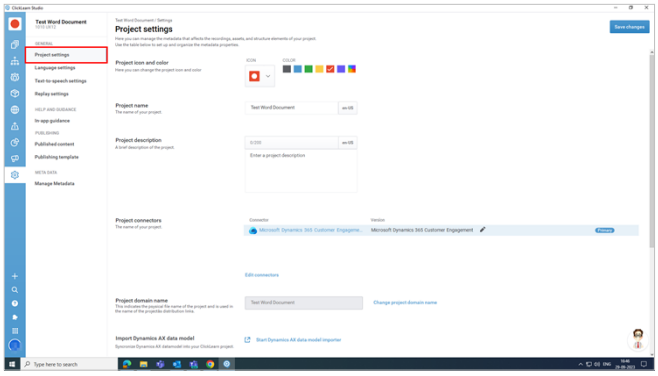
14. Settings

14.1. Project Settings Overview

One place to shape every project detail, to set your icon and name, manage connectors, import or export data, and update settings without touching the content itself.

14.1.1. Introduction

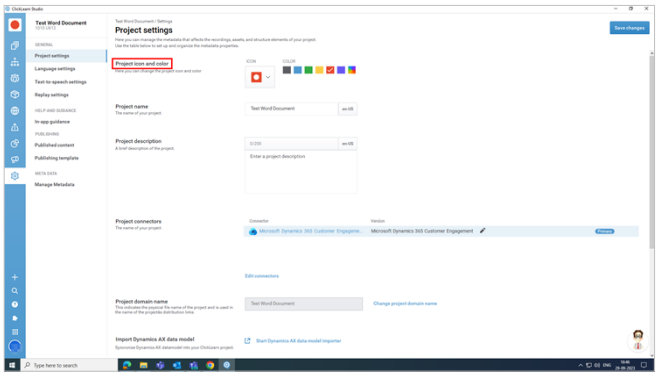
You can configure different aspects of your project through **Project settings**. Project setting will enable you to modify multiple project options and preferences.



14.1.1.1. Project icon and color

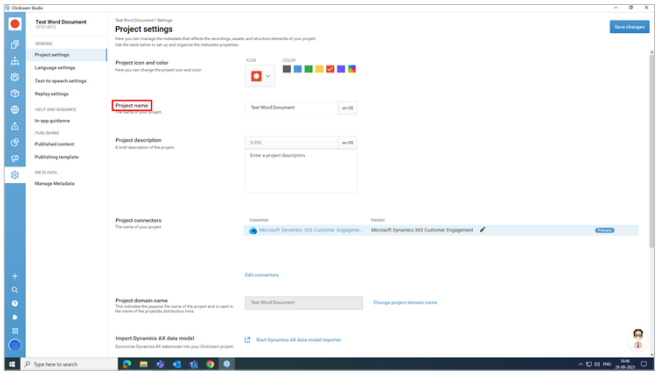
Project icon and color: You can choose the project icon from the available list of options.

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

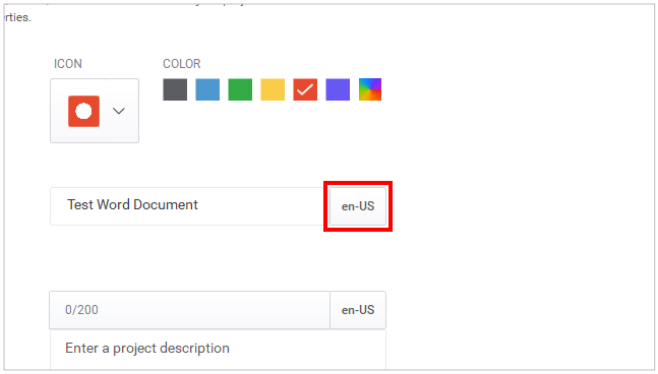


14.1.1.2. Project Name

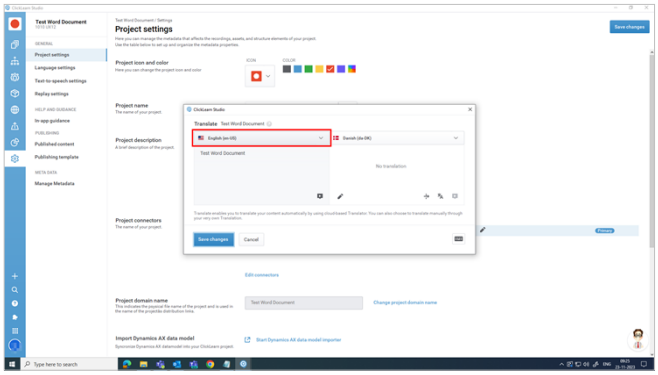
Project name: This reflects the name of your project.



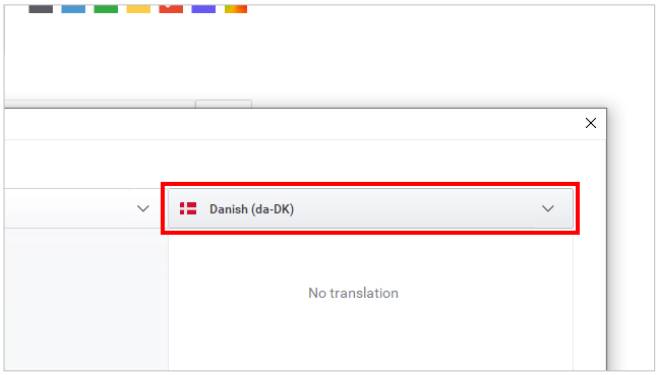
en-US: The en-US button allows you to translate the project name if you have one or more Languages included in the project. Click on the button **en-US**.



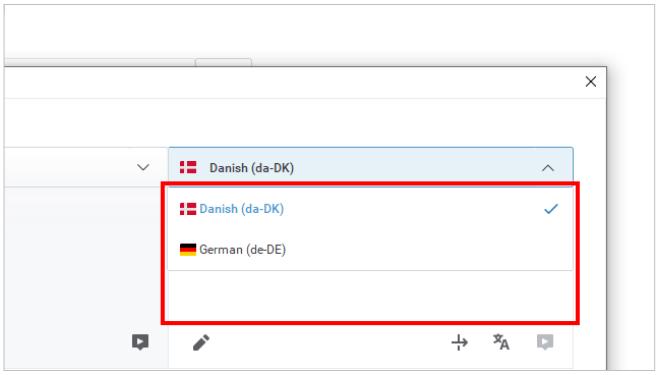
You can select the Language to change the project name in a new dialog box that pops up. Click on the dropdown **Language Left**.



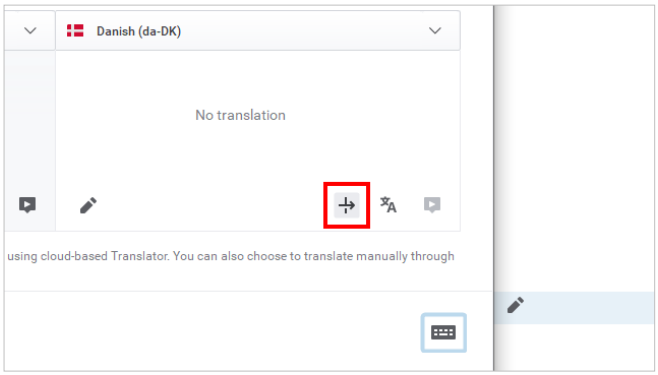
Click on the dropdown **Language Right.**



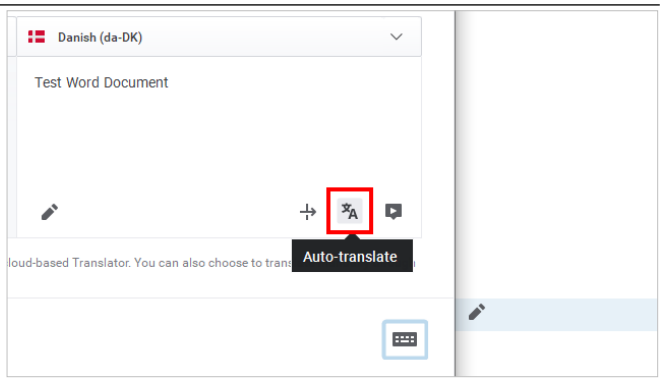
Select the **Language** from the dropdown.



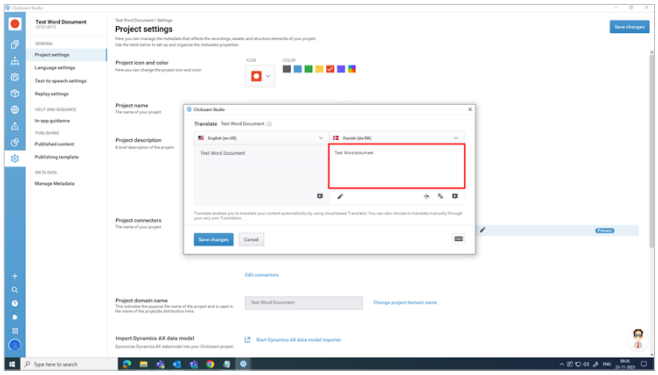
This icon uses the **same text as the source**.



Click on the icon **Autotranslate**.

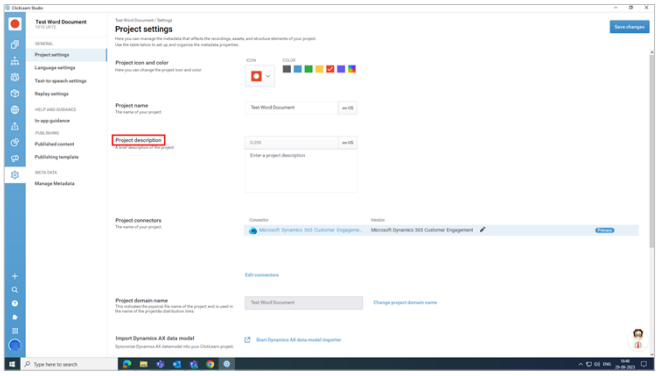


The project name is translated into Danish.

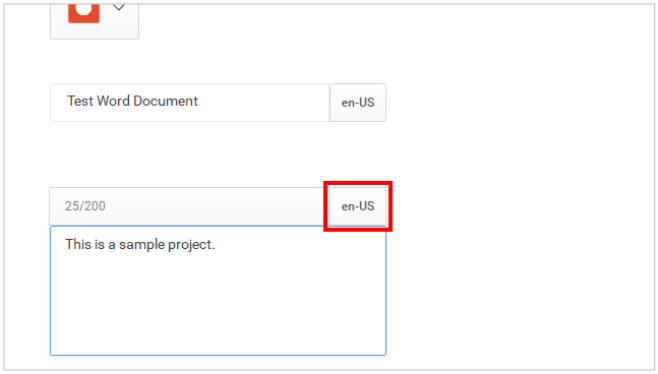


14.1.1.3. Project Description

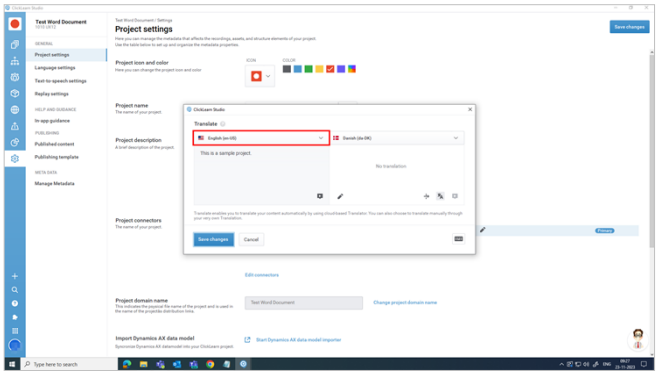
Project description: You can provide the summary for your project based on your project needs. The limitation of the project description is 200 words.



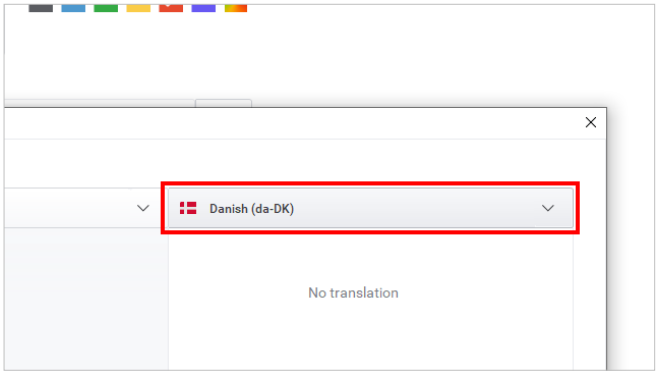
en-US: The en-US button allows you to translate the project description if you have one or more Languages included in the project. Click on the button **en-US**.



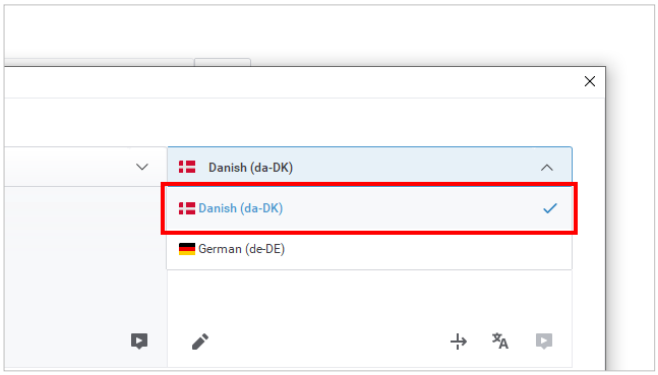
You can select the Language to change the project description in a new dialog box that pops up. Click on the dropdown **Language Left**.



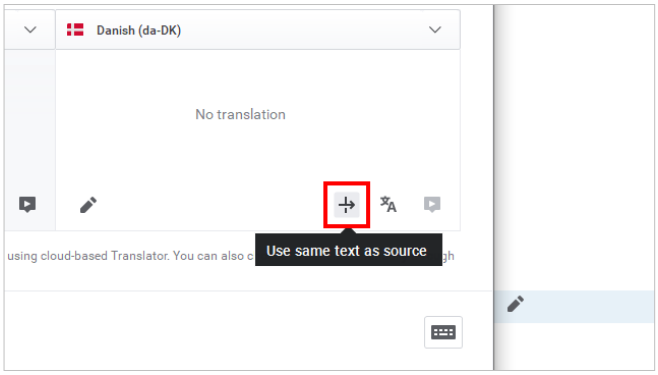
Click on the dropdown **Language Right.**



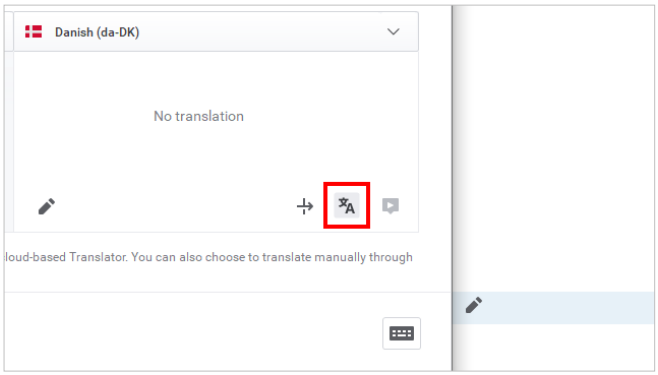
Select the Language from the dropdown. Click on the dropdown item **Danish (da-DK)**.



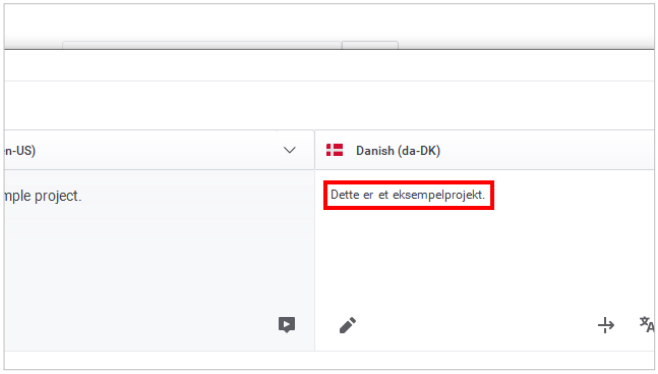
Click on the icon: **Use same text as source.**



Click on the icon **Autotranslate**.



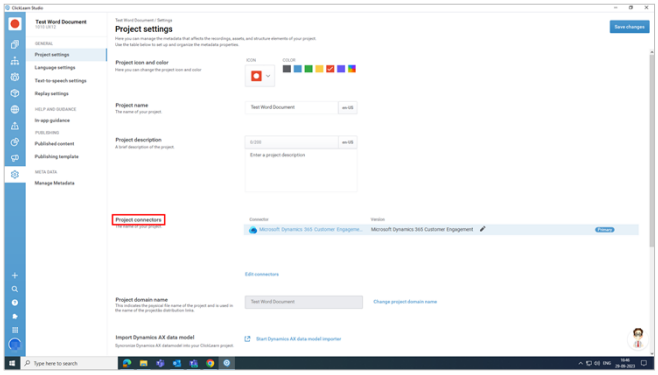
The project description is translated into Danish.



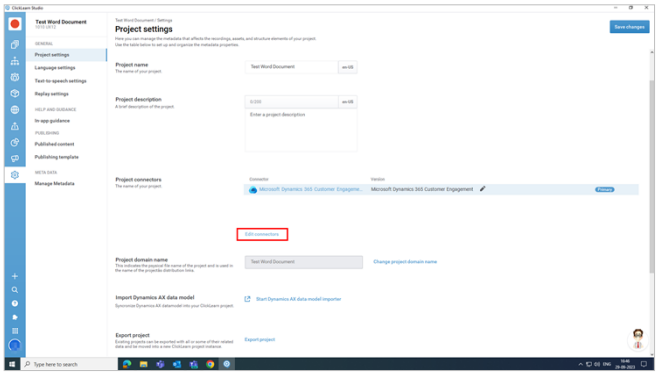
14.1.1.4. Project Connectors

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.

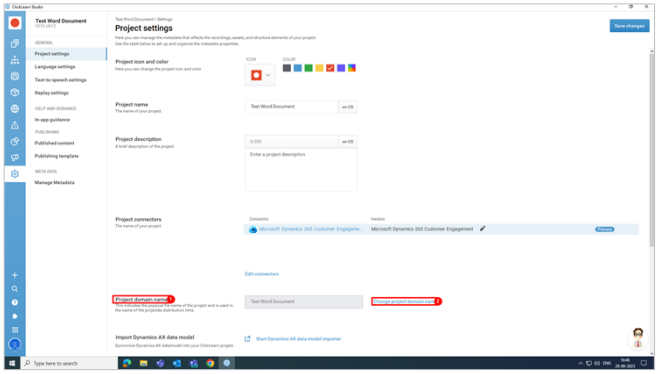


14.1.1.5. Project Domain Name

Project Domain Name

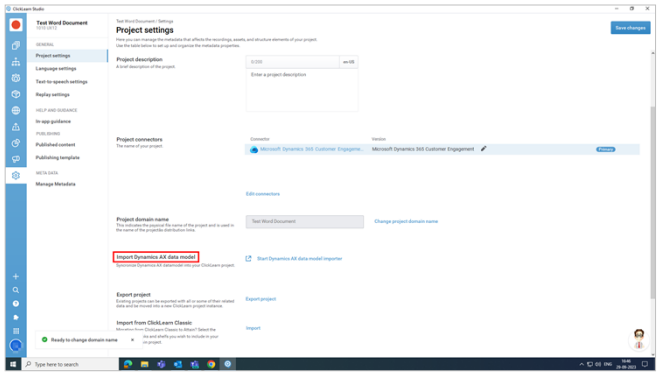
1. **Project domain name:** The project's file name and name used in its distribution link.
2. **Change project domain name:** You can change your project name.

   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.

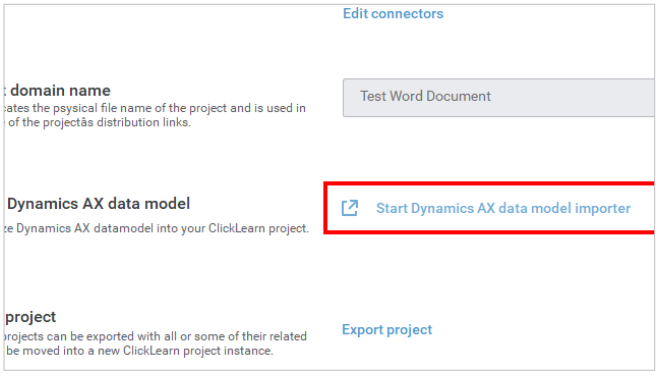


14.1.1.6. Import Dynamics AX data model

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

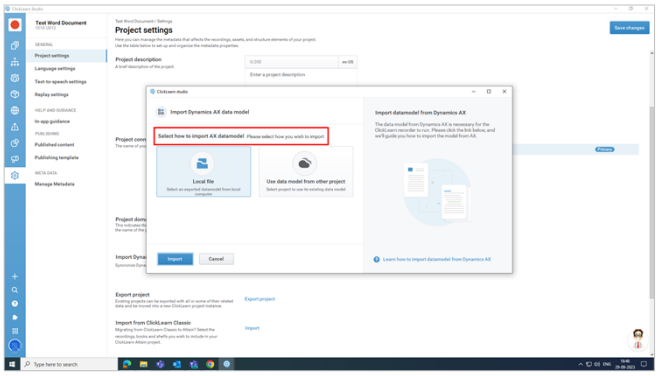


Click on the button **Start Dynamics AX data model importer**.



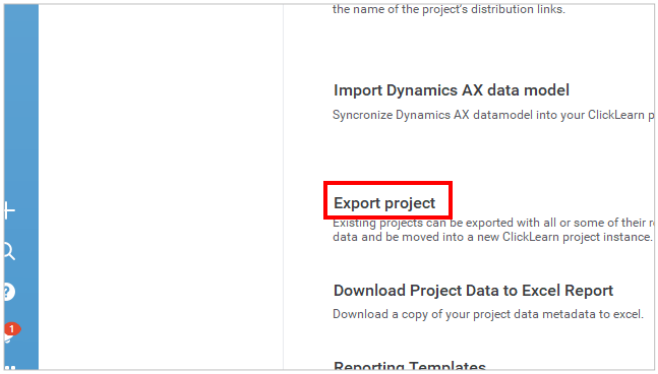
There are two ways in which you can import.

- **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.



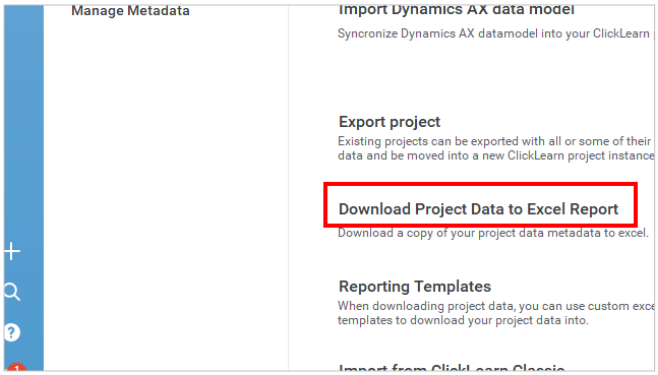
14.1.1.7. Export Project

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.



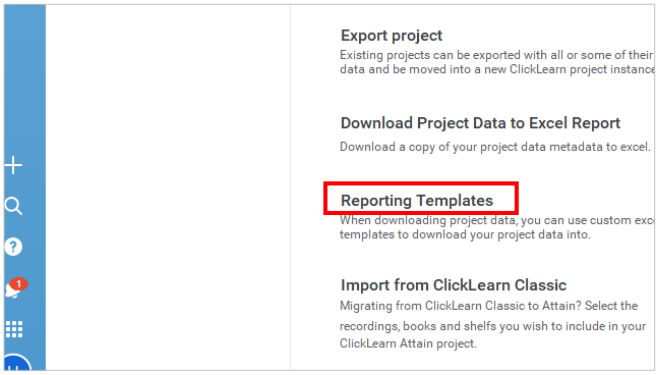
14.1.1.7.1. Export Project Data

Export project data: Export project data to an Excel file for easy access, analysis, and further use. You can export data related to recordings, structure, assets, and tasks, and customize the Excel template according to your requirements.



14.1.1.7.1.1. Manage Reporting Templates

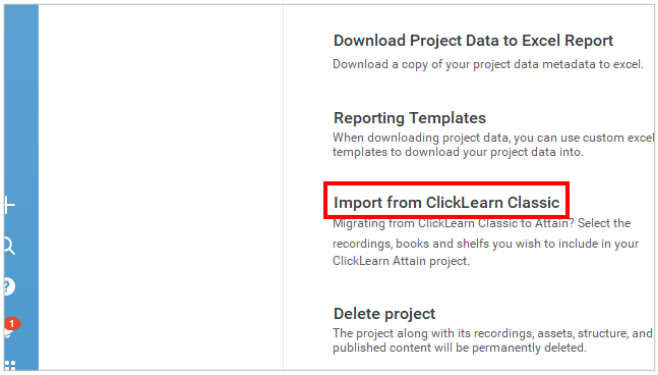
Manage reporting templates: Choose a customized Excel template to download your project data in the format you need.



14.1.1.7.1.2. Import from ClickLearn Classic

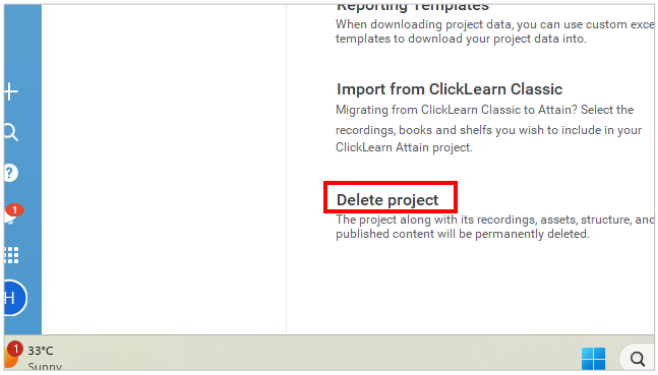
Import from ClickLearn Classic: Import your Classic project into ClickLearn Attain.

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



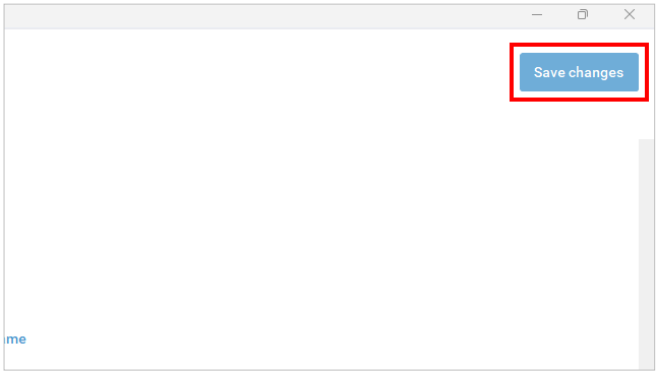
14.1.1.7.1.3. Delete Project

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



14.1.1.7.1.4. Save Changes

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

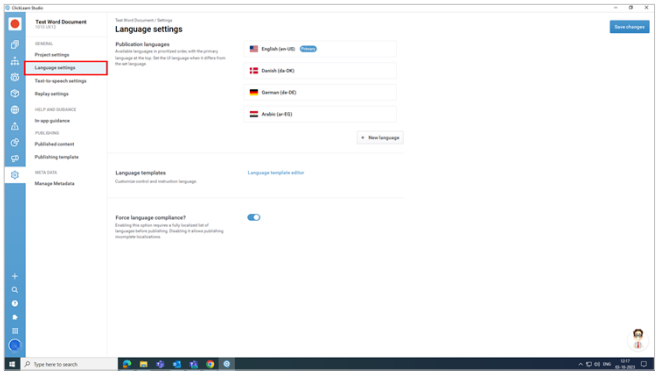


14.2.Language Settings

Full control over your project's languages, to add or remove languages, set the UI language, customize templates, and enforce localization rules without leaving the settings screen.

14.2.1. Introduction

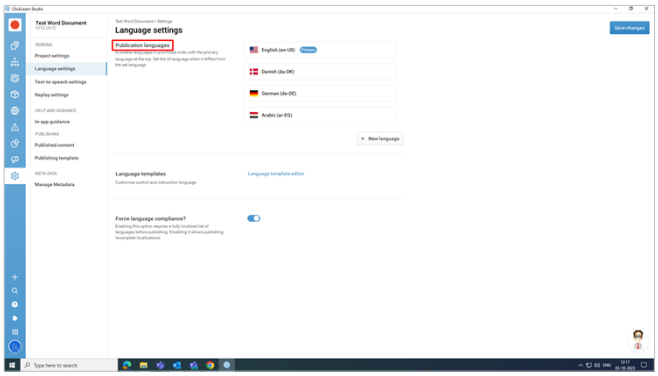
The **Language settings** allow you to incorporate and eliminate languages from your project. You can also modify various elements of the languages used for your projects.



14.2.1.1. Publication Languages

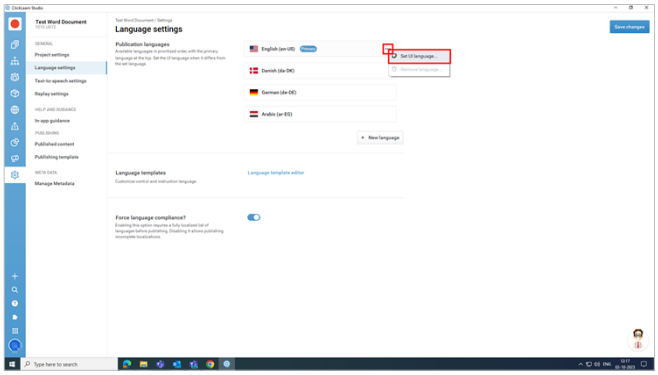
Publication languages: This displays the available languages ranked by importance, with the top one being the primary language.

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.



14.2.1.2. 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.

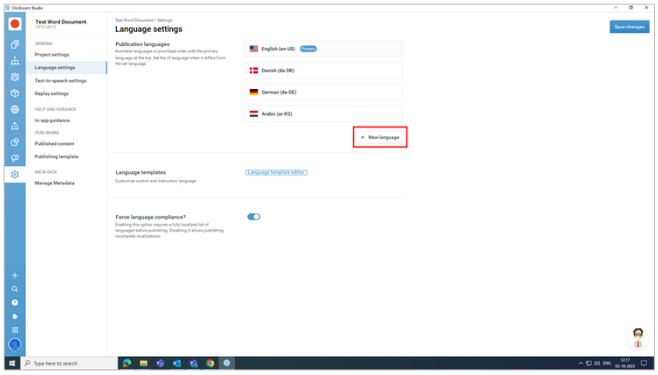
    Click on **Set UI language**.

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

    Choose the UI language that suits your project requirements.

14.2.1.3. + New Language

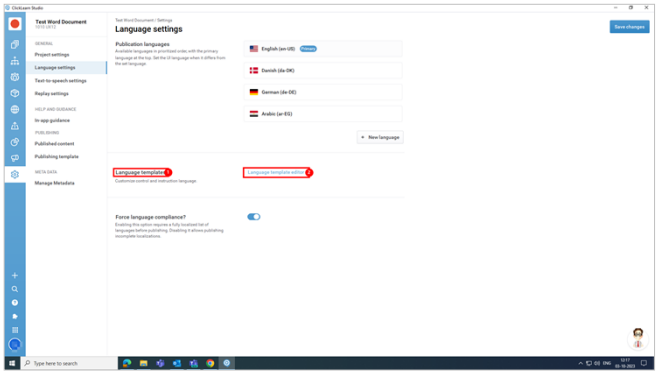
New language: You can view the list of languages you can use in your project.



14.2.1.4. Language Templates

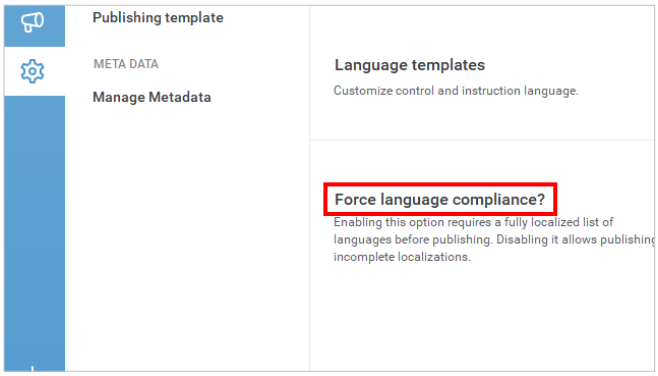
Language Template and Editor

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.



14.2.1.5. Force language compliance

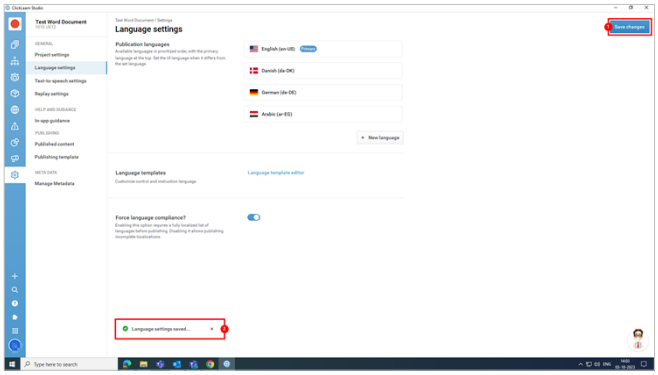
Force language compliance: Enabling this option requires a fully localized list of languages before publishing. Disabling it allows the publishing of incomplete localizations.



14.2.1.6. 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**.



14.3.Set Up Text-to-Speech

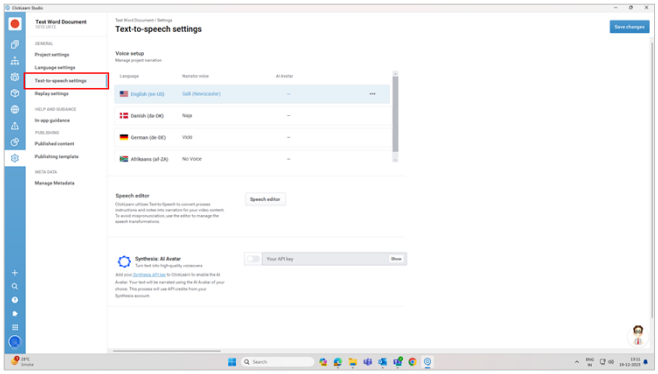
14.3.1. Overview of Text-to-speech Settings

Studio-quality narration tuned to your project, to pick voices and AI avatars, adjust speed and dialect, and fix pronunciations without recording a single line yourself.

14.3.1.1. Introduction

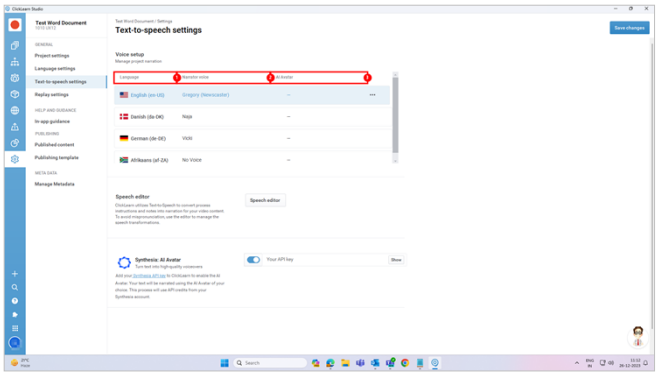
The **Text-to-speech settings** allow you to customize the voice, speed, volume, and timing of the audio narration for your videos and virtual assistants.

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



14.3.1.1.1. Voice Setup

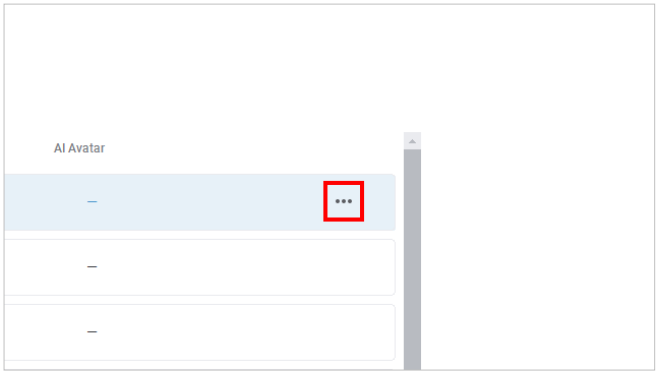
Voice setup



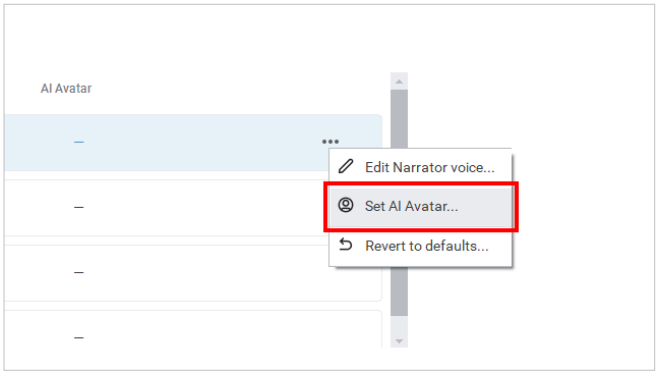
1. **Language:** This displays the list of languages you added to your project.
2. **Narrator voice:** This indicates the voice you selected for the language.
3. **AI Avatar:** This shows the AI Avatar you have chosen for the language.

14.3.1.1.2. AI Avatar

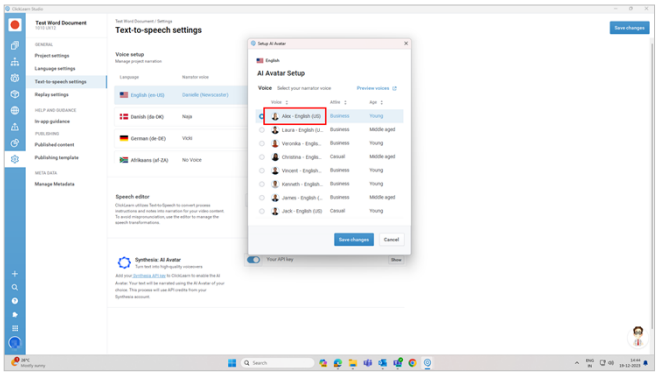
To set the AI Avatar for a particular language, click on the button **Edit** of grid cell **Action** associated with that language.



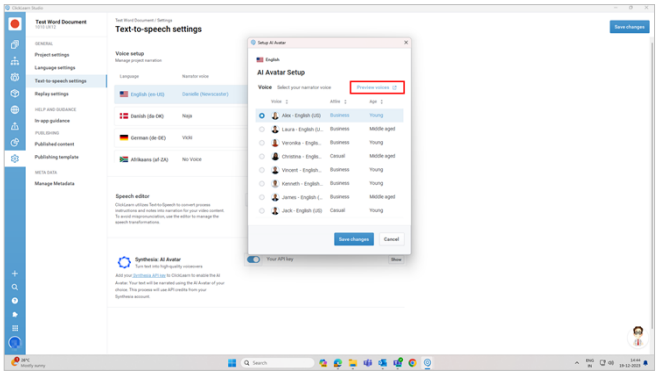
Click on the menu item **Set AI Avatar.**



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.

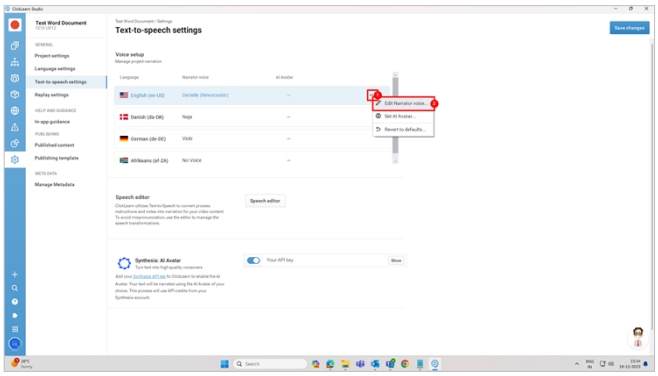


14.3.1.1.3. More Options

Edit Narrator Voice

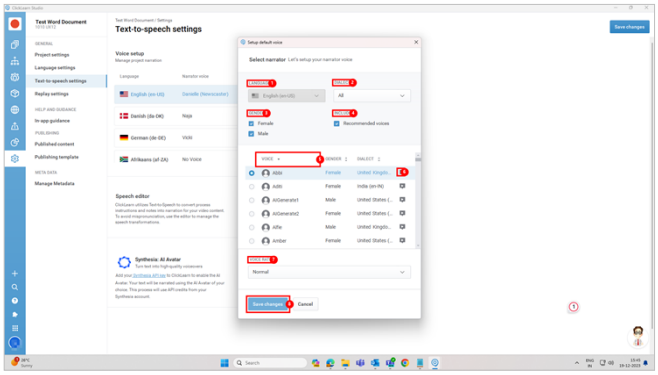
1. Click on the button **Edit** of grid cell **Action**.
2. Click on the menu item: **Edit Narrator voice.**

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



14.3.1.1.3.1. Setup Default Voice

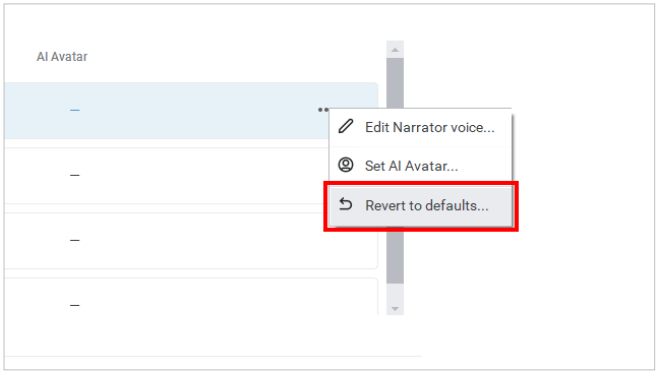
Setup default voice



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.

14.3.1.1.3.2. Revert to defaults

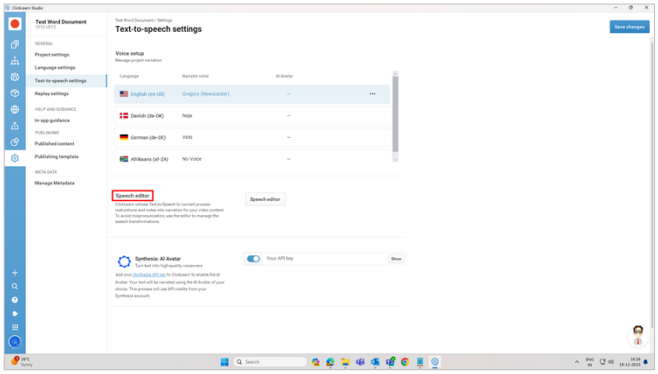
Revert to defaults: This option restores all the settings to their original values.



14.3.1.1.4. Speech Editor

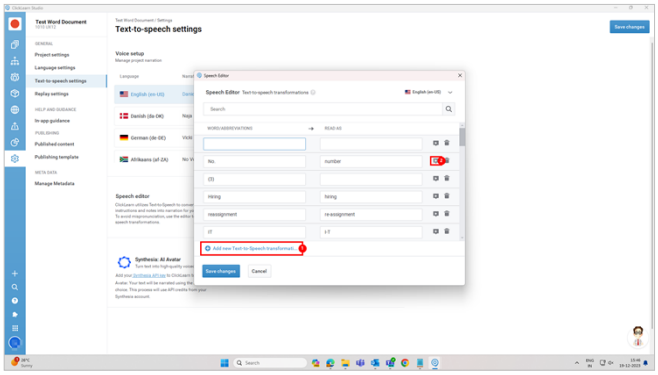
Speech editor: ClickLearn Attain utilizes Text-to-Speech to convert process instructions and notes into narration for your video content. To avoid mispronunciation, use the editor to manage the speech transformations.

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



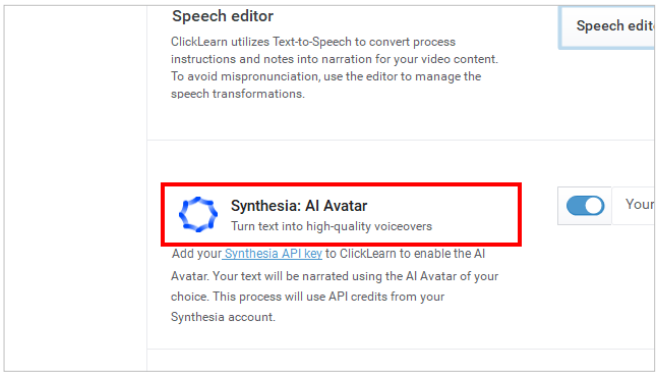
Speech Editor

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.

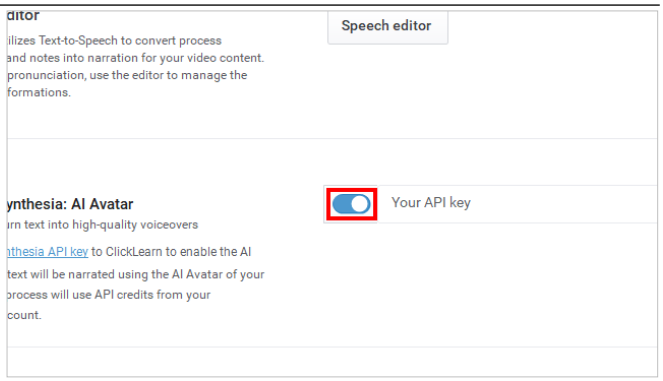


14.3.1.1.5. Synthesia: AI Avatar

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.



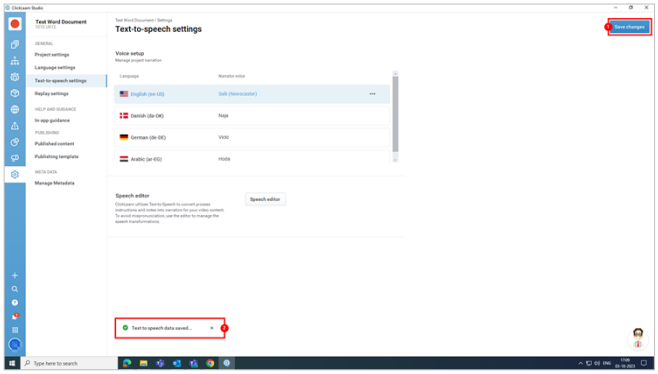
Click on the toggle switch **Toggle On Off** to enable the API key.



14.3.1.1.6. 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**.



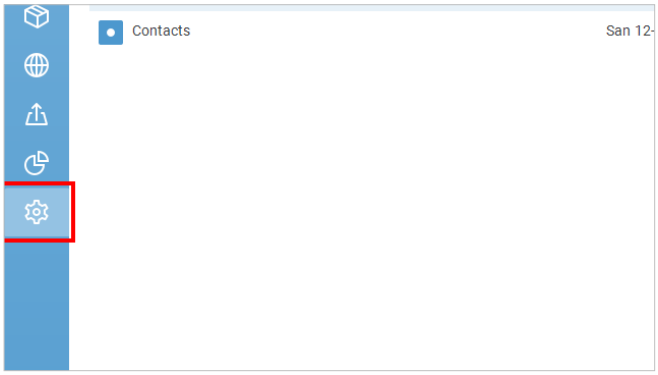
14.3.2. Copy Text-to-Speech Between Projects

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.

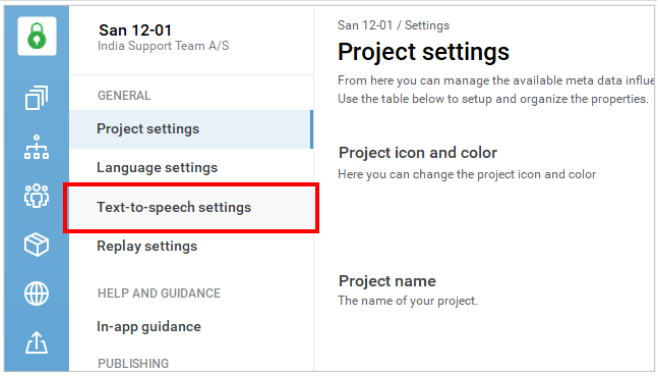
14.3.2.1. Add text-to-speech

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

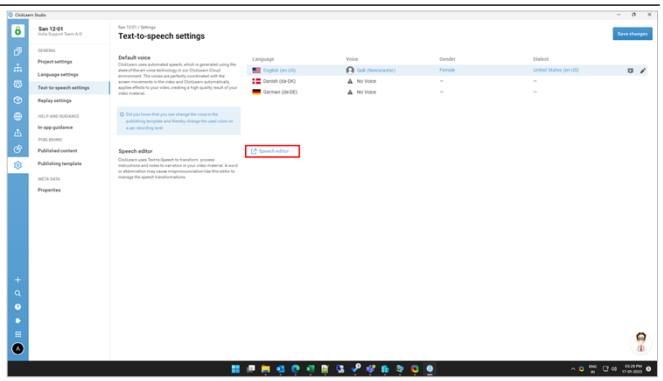
Click on the **Settings** button.



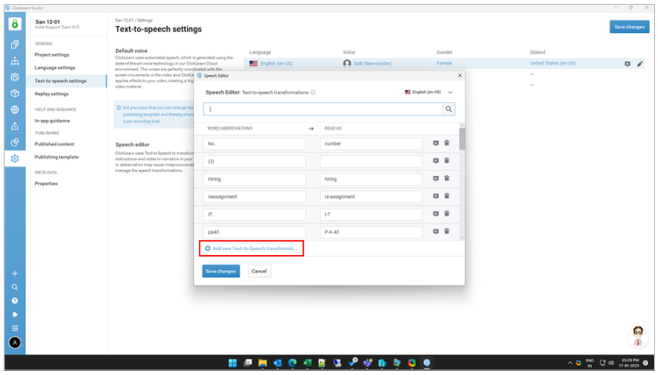
Click on the button **Text-to-speech settings**.



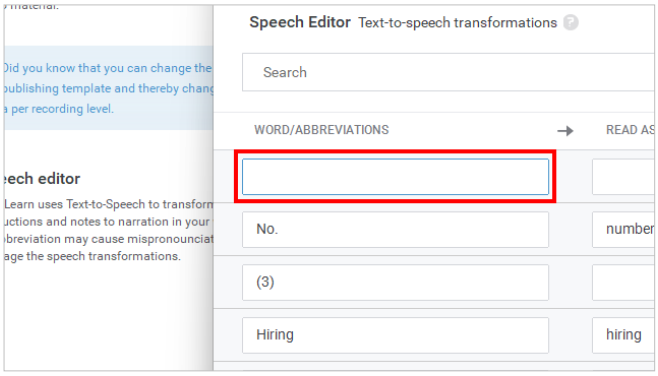
Click on the **Speech editor** button.



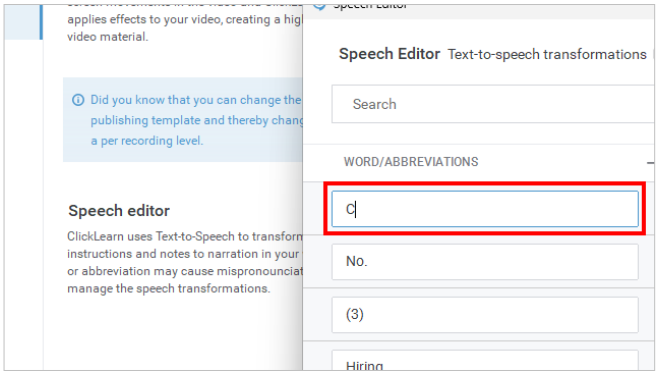
Click on the button: **Add new Text-to-Speech transformation**.



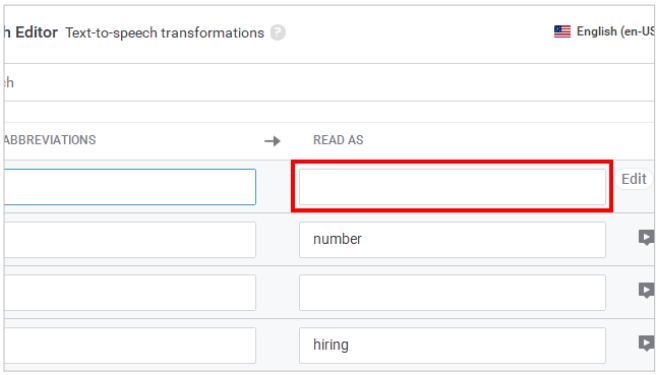
Click on the text box to enter **word/Abbreviations**.



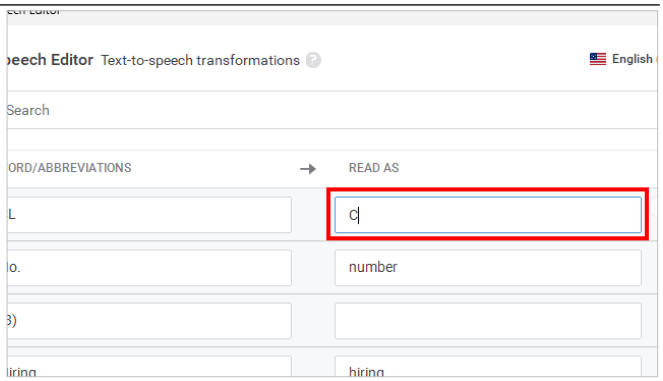
Enter the text **CL**.



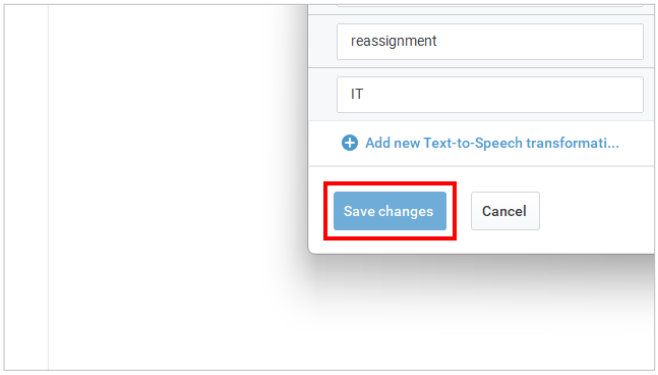
Click on the textbox to enter **Read As** text.



Enter the text **Clicklearn**.



Click on the button **Save changes**.

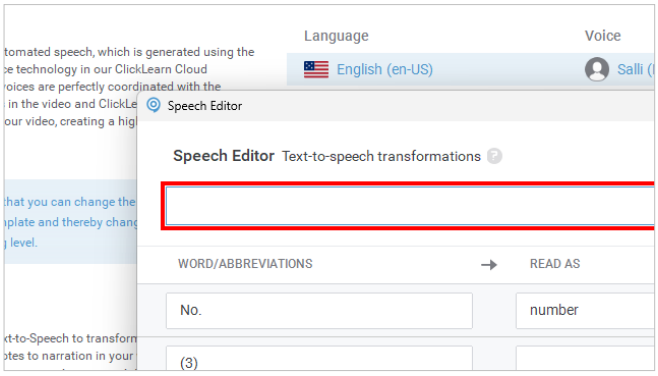


Click on the button **Save changes**.

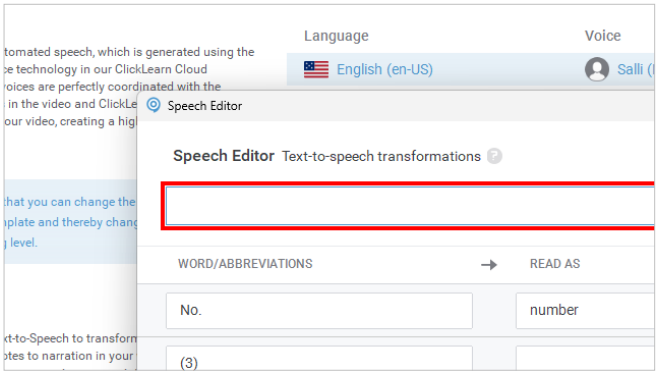
14.3.2.2. Copy text-to-speech to other project

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

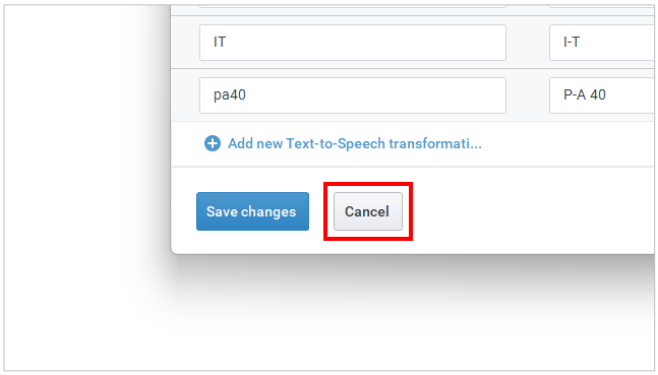
Click on the input textbox **Search** with the value **Search**.



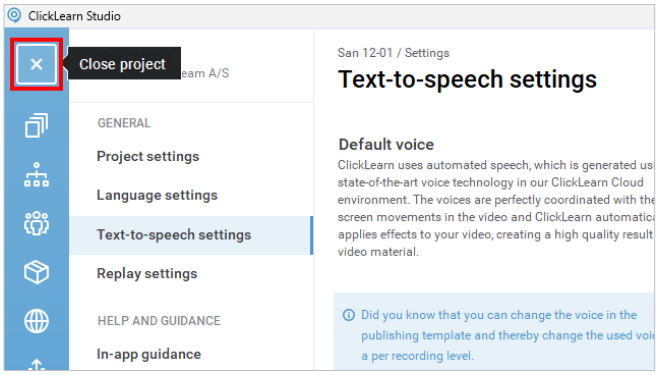
Press **CTRL+c**.



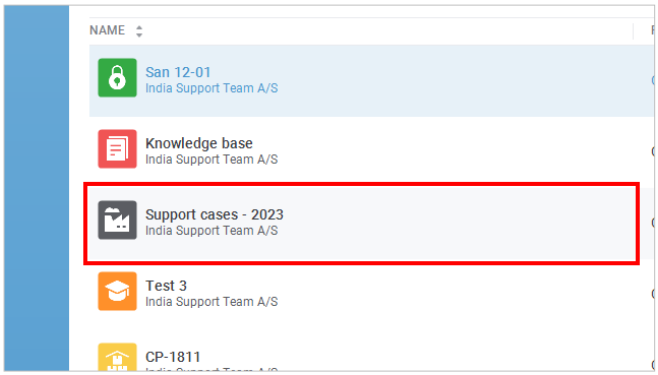
Click on the button **Cancel**.



Click on the button **Close project**.

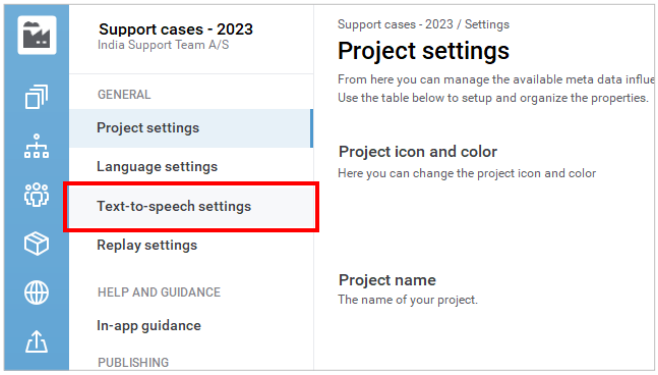


Choose a destination project on which you would like to paste the copied text-to-speech.
Double-click on the grid cell **NAME** with the value **Support cases - 2023**.

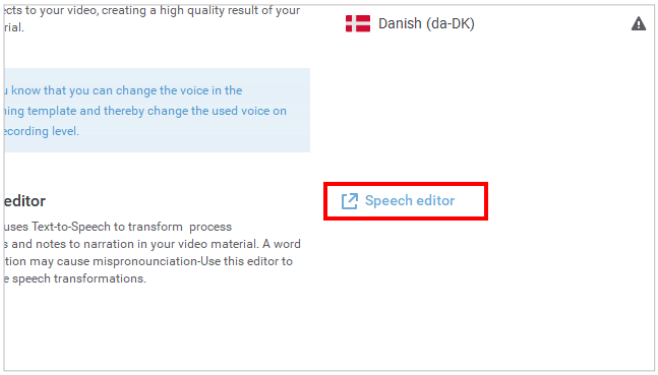


Click on the **Settings** button.

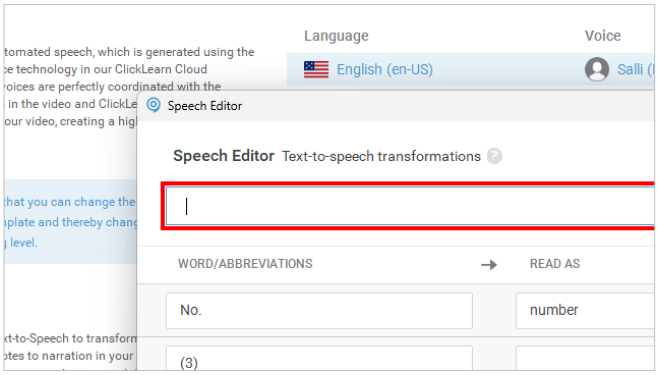
Click on the button **Text-to-speech settings**.



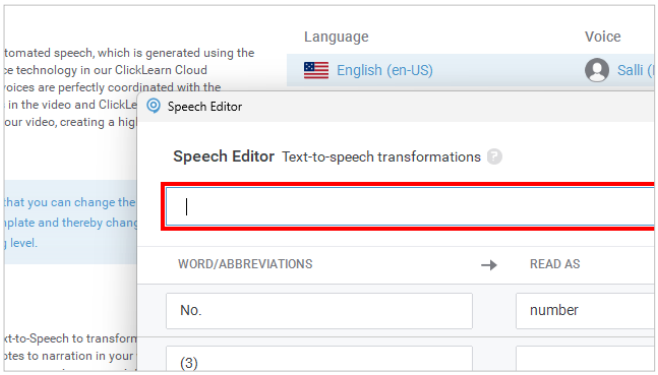
Click on the **Speech editor** button.



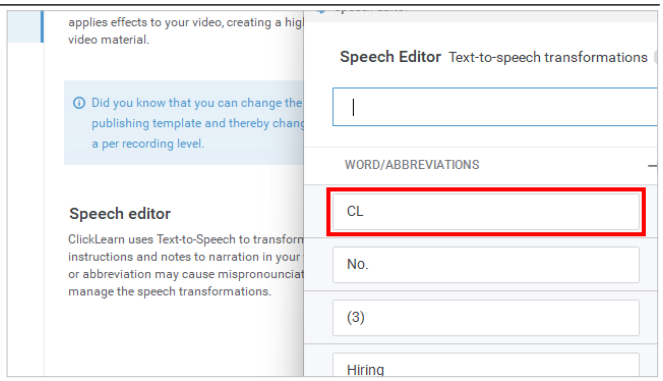
Click on the input textbox **Search** with the value **Search**.



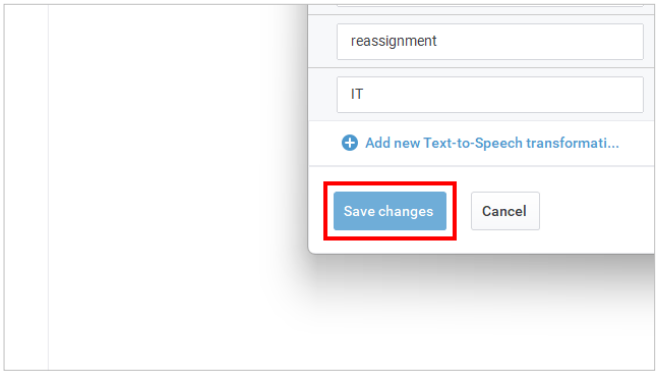
Press **CTRL+v**.



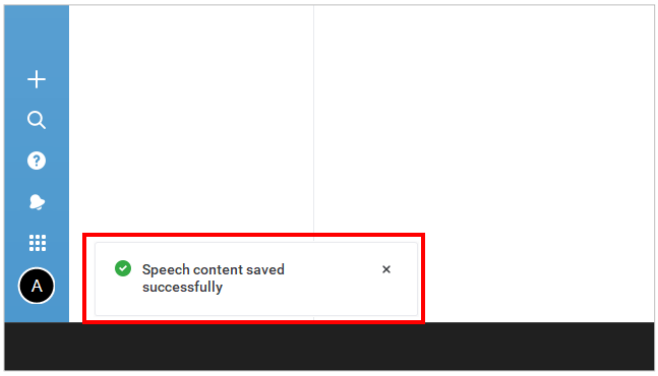
Verify that if it has pasted your content.
Click on the grid view cell **WORD/ABBREVIATIONS** with data **CL**.



Click on the button **Save changes**.



Make sure your content is saved successfully.

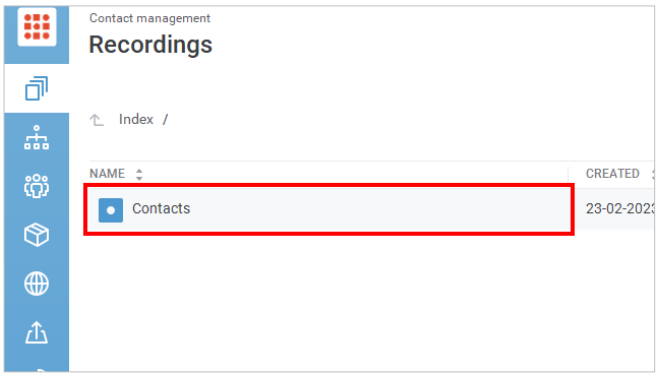


14.3.3. Customise Audio in Recordings

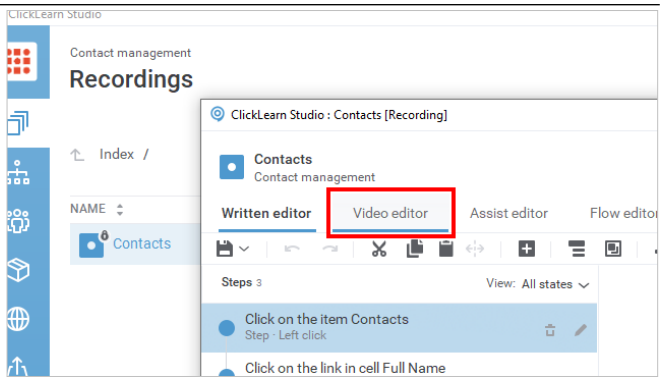
Replace auto-generated narration with your own recorded voice or an uploaded audio file. It can be used for content that requires a specific presenter or tone.

14.3.3.1. Add Custom Audio to a Recording

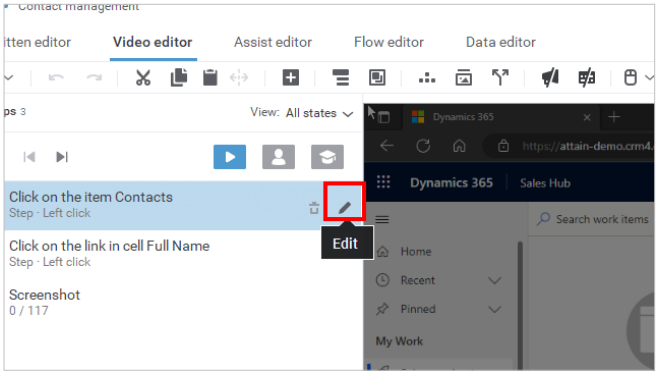
Open the recording in which you wish to add custom audio.



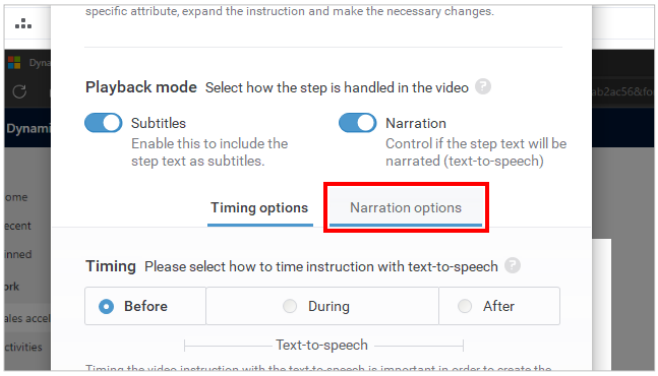
Click on the tab item **Video editor.**



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

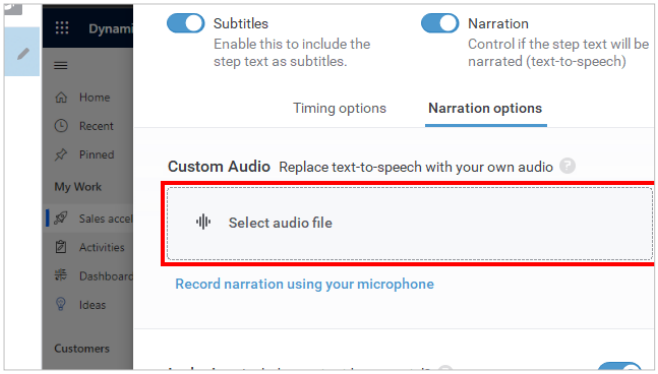


Click on the tab item **Narration options.**

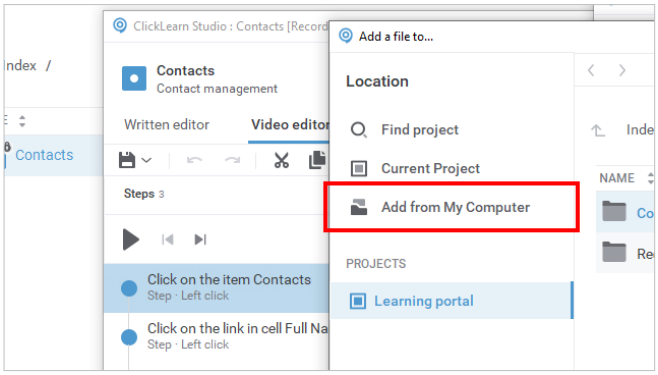


14.3.3.2. Add custom audio using an audio file

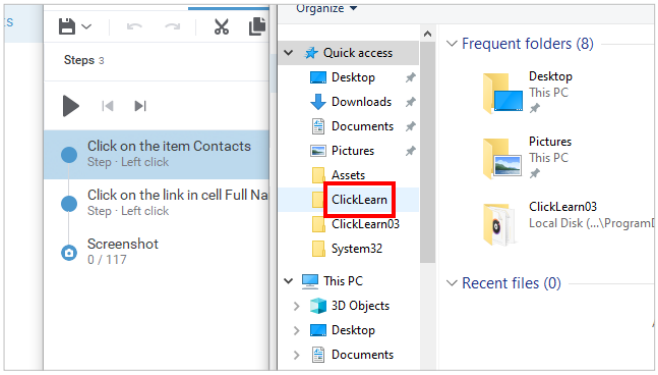
Click on the button **Select audio file.**
This option will allow users to choose an audio file from their local machine for the selected step.



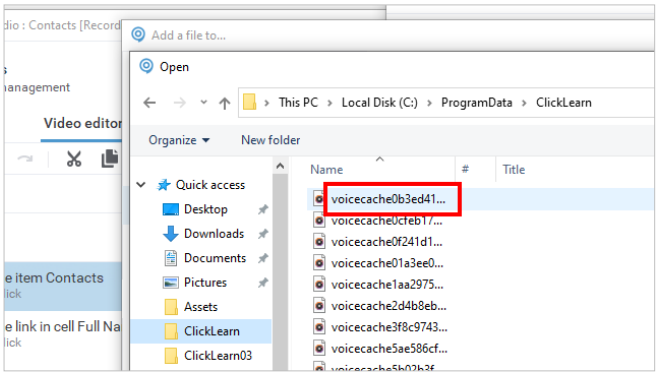
Click on the button **Add from My Computer**.



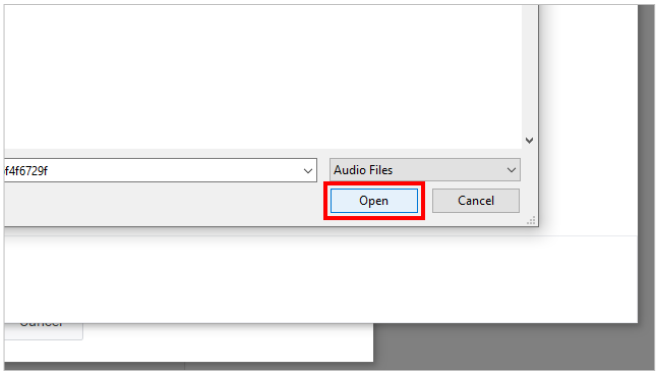
Click on the folder **ClickLearn**.



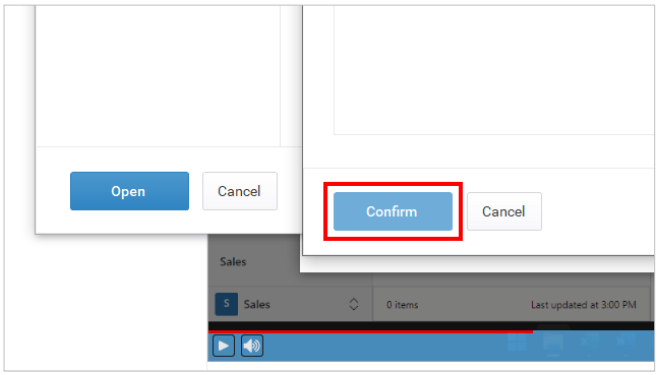
Select an audio file from your machine.



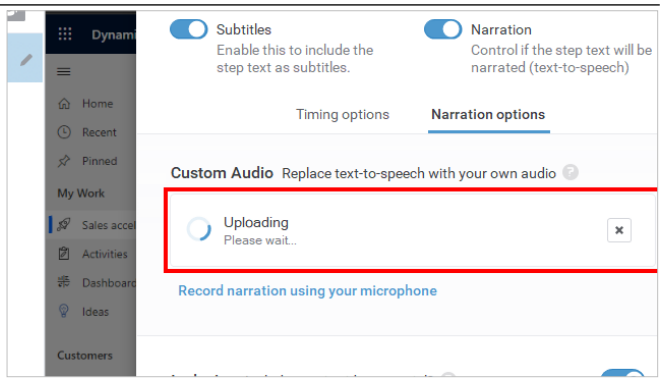
Click on the **Open** button.



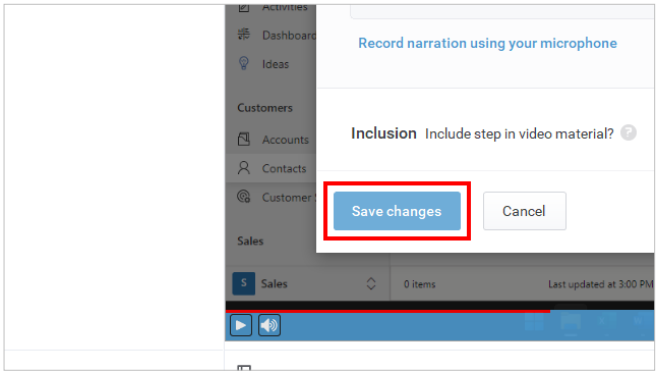
Click on the button **Confirm**.



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

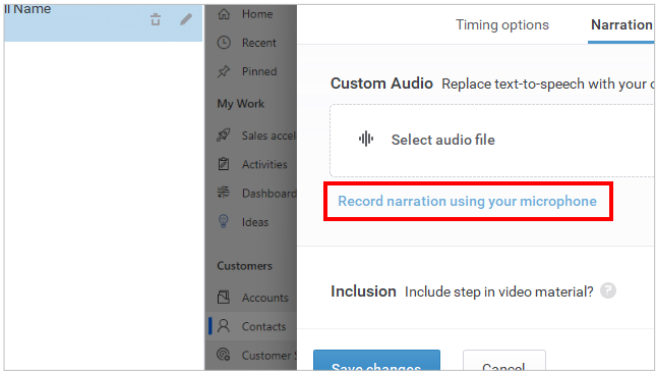


Click on the button **Save changes**.

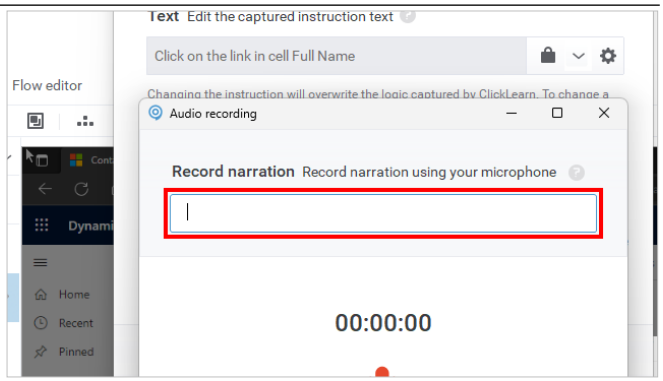


14.3.3.3. Record voice using a microphone

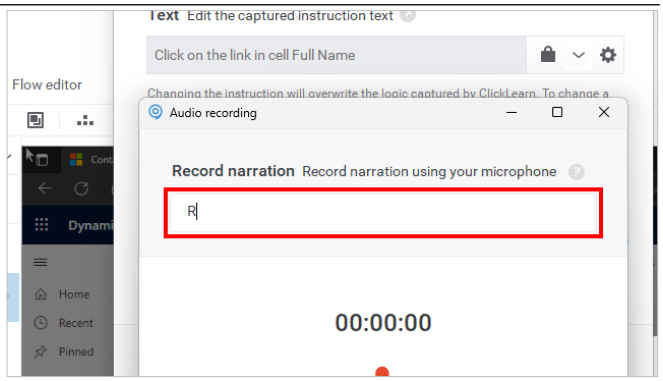
Click on the button: **Record narration using your microphone**.



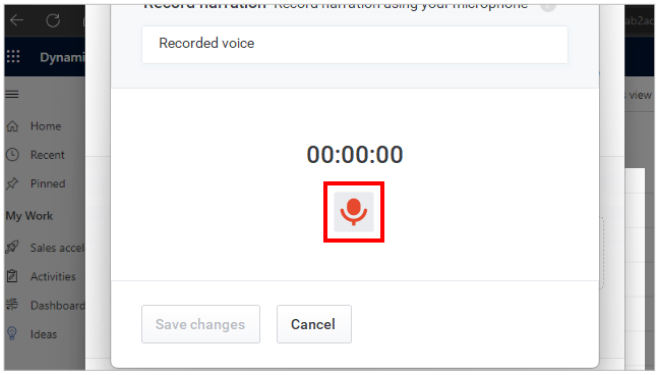
Click on the textbox **AudioName**.



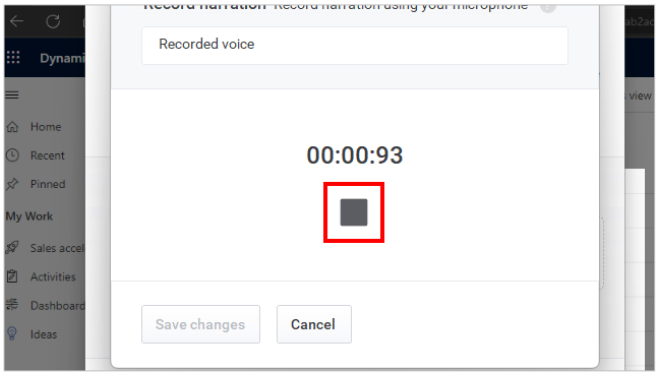
Enter **AudioName**.



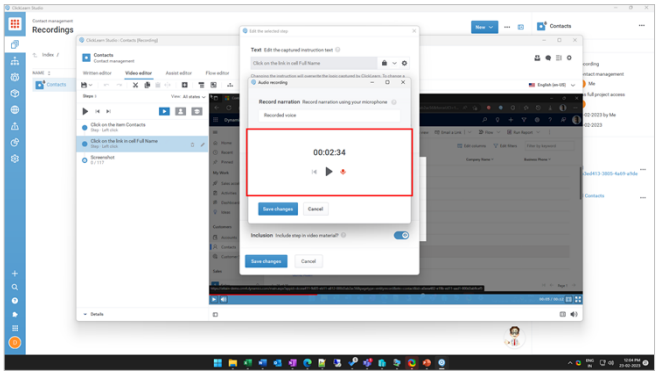
Click on the link icon, **Microphone.**
After clicking the Microphone button, sound from your PC's Microphone will be recorded until you click the stop button.



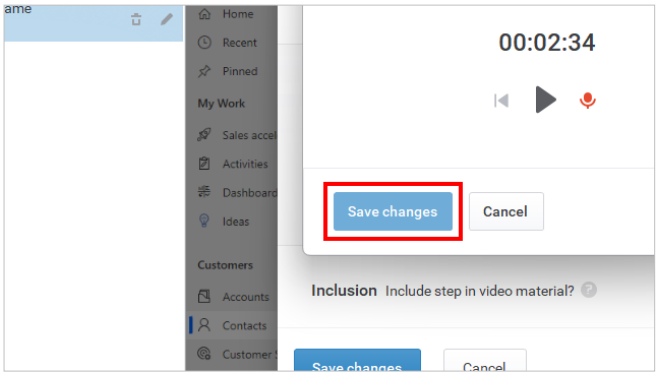
Click on the link icon: **Stop** after you have recorded your voice.



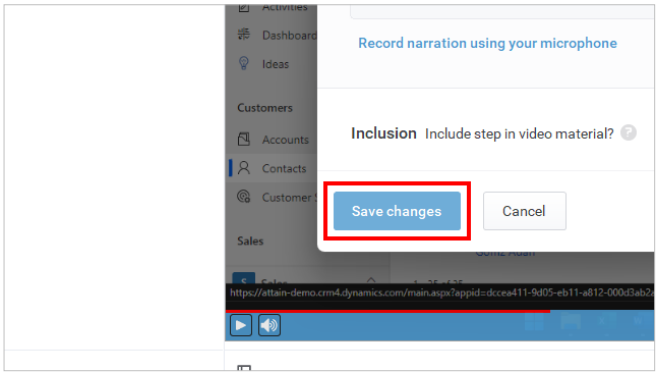
Here, you can playback your audio by clicking on the play button, and if you are not satisfied, you can re-record the audio.



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



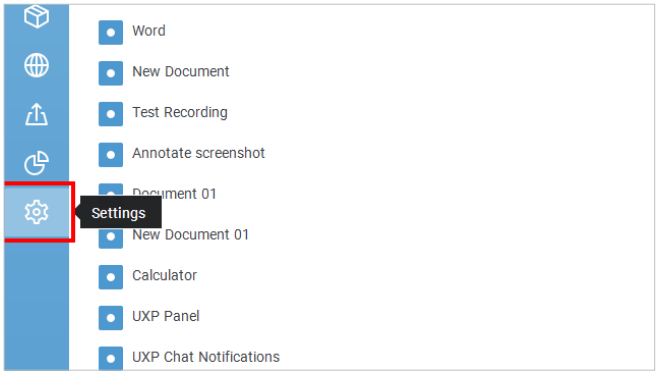
Click on the button **Save changes**.



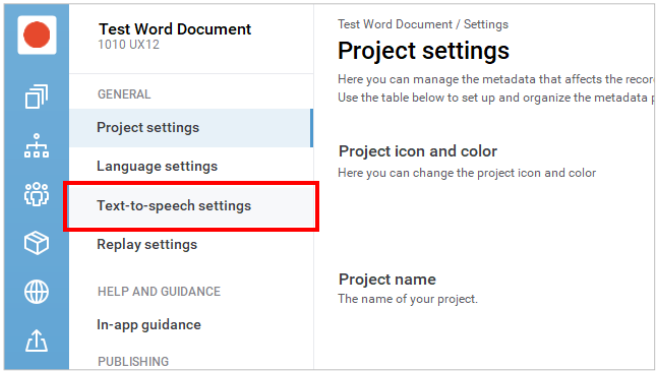
14.3.4. Change default voice

The right narrator voice in a few clicks, to filter by dialect and gender, preview your options, and set the speech rate without leaving the settings screen.

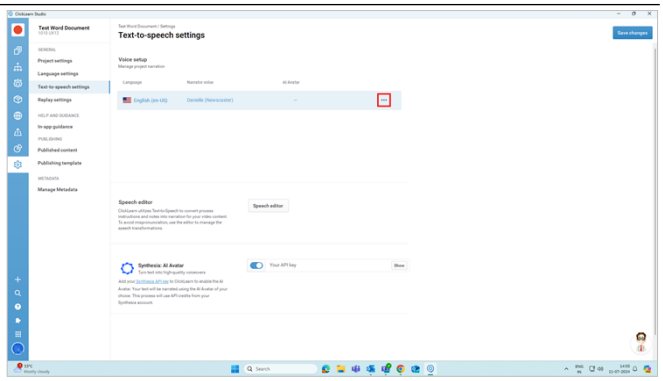
Click on the **Settings** button.



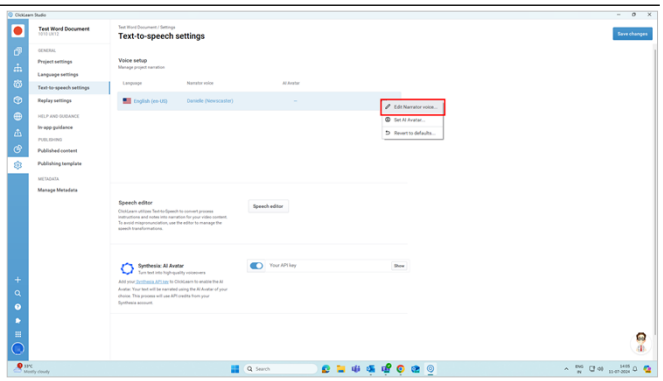
Click on the button **Text-to-speech settings**.



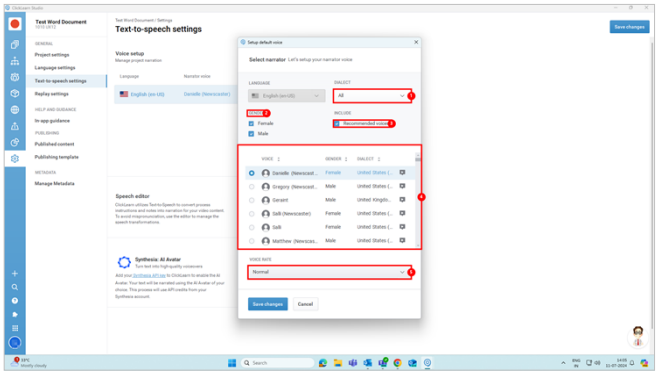
Click on the button **Edit** of grid cell **Action**.



Click on the menu item: **Edit Narrator voice**.

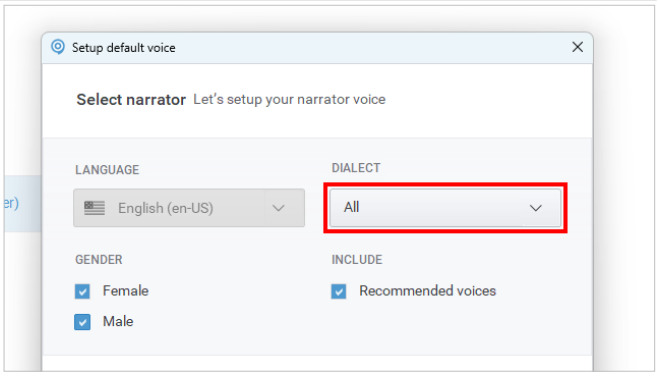


Select narrator

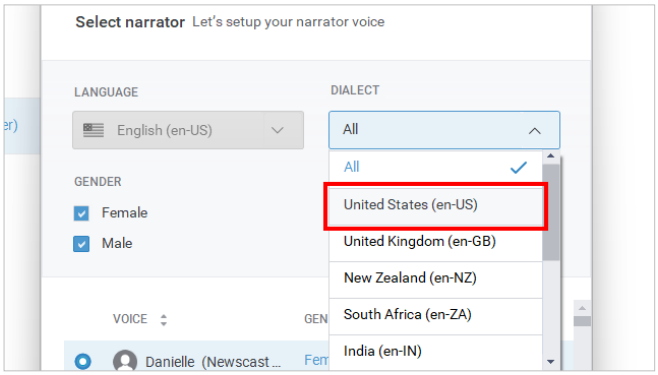


1. **Dialect:** To see languages of a particular dialect, select it from the dropdown list.
2. **GENDER:** Voice filtration is available gender-wise as well.
3. **Recommended voices:** ClickLearn Attain will recommend voices for better options if you check this.
4. **List of voices:** This is the list of voices filtered based on the selection.
5. **Voice Rate:** This option allows you to select how quickly the speech gets generated.

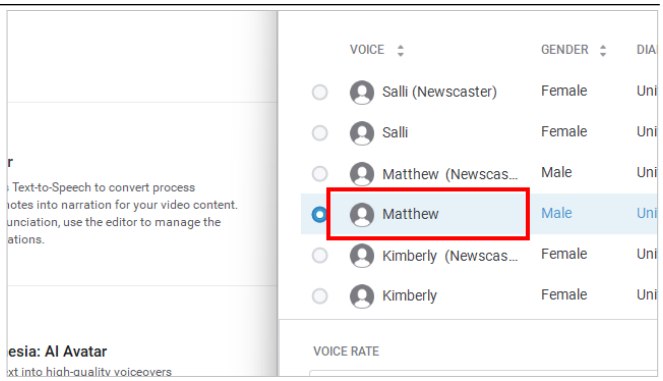
Click on the dropdown **Dialect**.



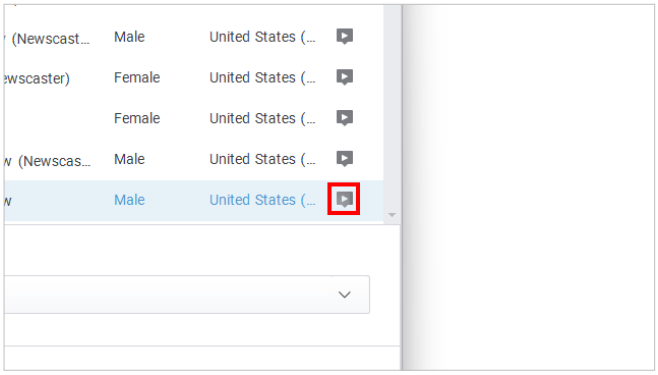
Click on the dropdown item **United States (en-US)**.



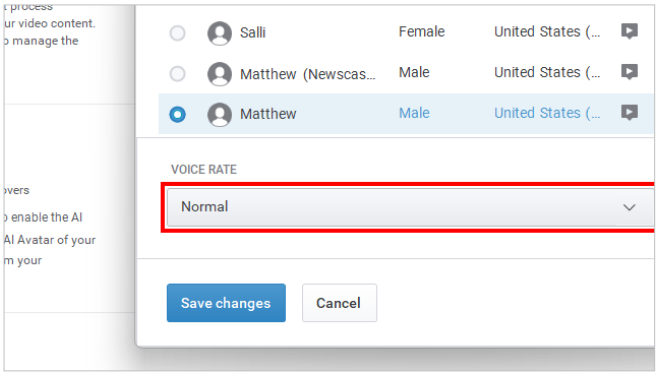
Click on the grid cell **VOICE** with the value **Matthew**.



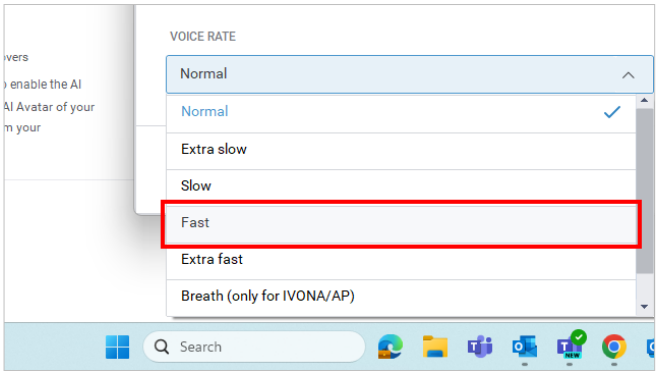
Click on the button **More** of grid cell **Action**
You can preview the narration by clicking the highlighted button.



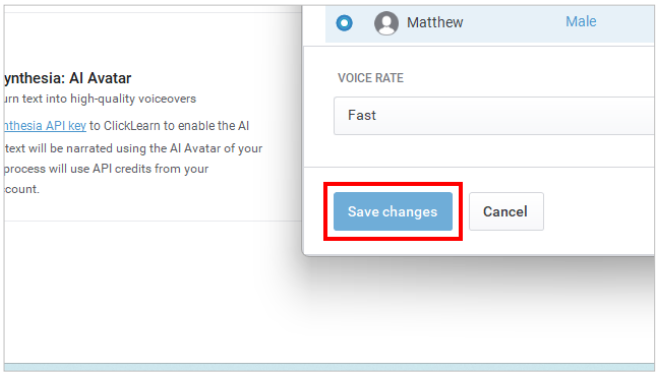
Click on the dropdown **Voice Rate**.



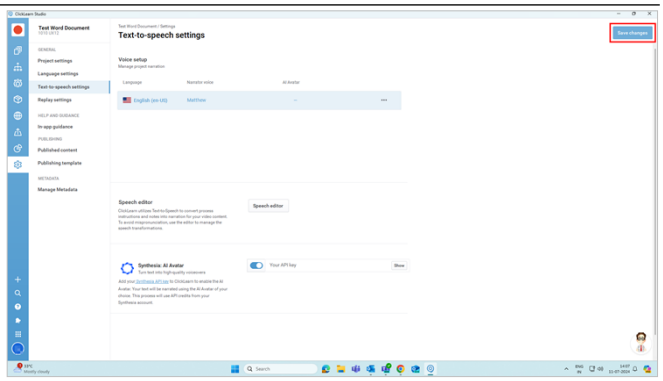
Click on the dropdown item **Fast**.



Click on the button **Save changes**.



Click on the button **Save changes**.



14.3.5. Configure an AI Avatar

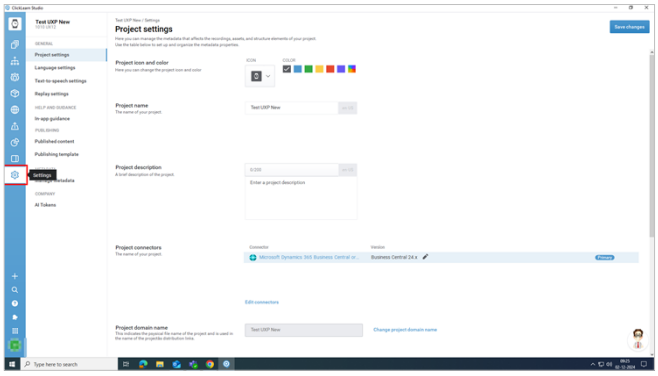
14.3.5.1. Configure an AI Avatar

Lifelike AI avatars presenting your content, to connect Synthesia or Colossyan, customize voice and appearance, and publish avatar-led videos without filming anything yourself.

14.3.5.1.1. Introduction

The AI Avatar is used to convert text into voiceovers. You can also select the language of your choice for Avatar. To create a **Synthesia** or **Colossyan AI Avatar,** you must add an API as a pre-requisite. This API key should be added in settings.

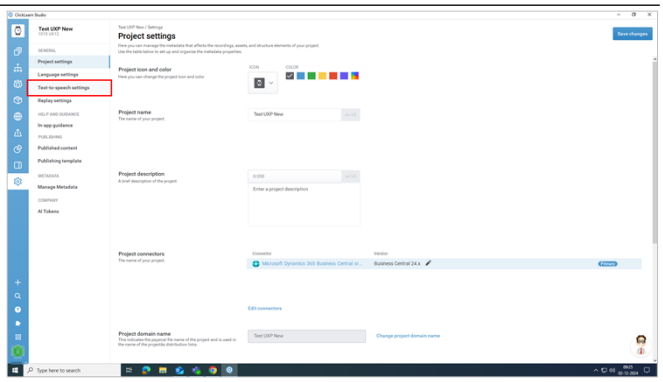
Click on the button **Settings.**



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

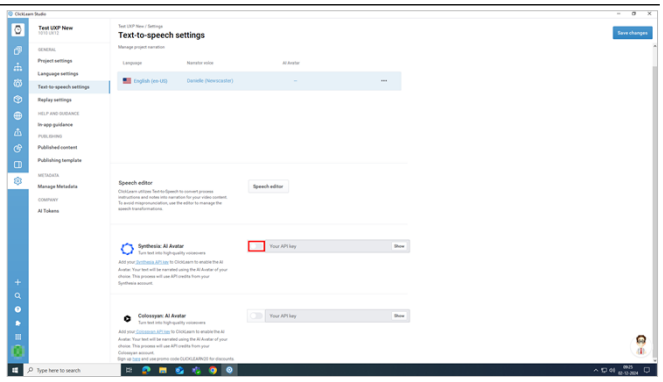
Here, you can choose from AI Avatars to turn your text into high-quality voiceovers.

Note: You can only add **one AI Avatar** at a time, either Synthesia or Colossyan.



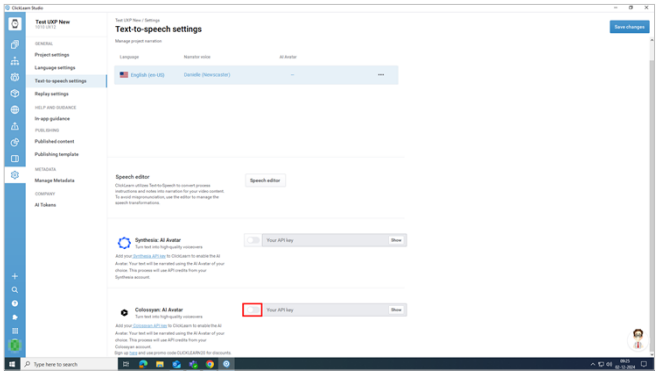
Enable **Synthesia** by toggling the key.

Sign up to Synthesiaand get an API key. Enter the API key you get in the text box.



Enable **Colossyan** by toggling the key.

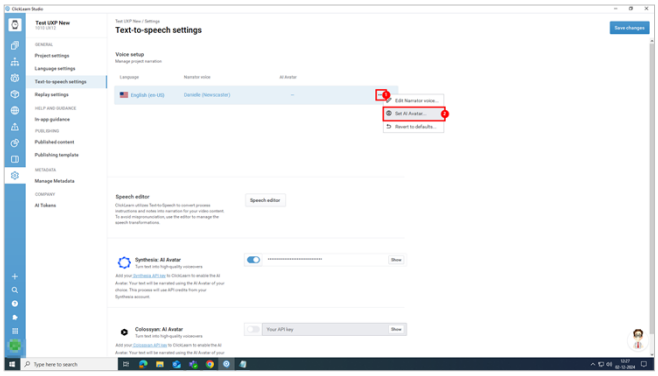
Sign up to Colossyanand get an API key. Enter the API key in the text box.



Select the Avatar

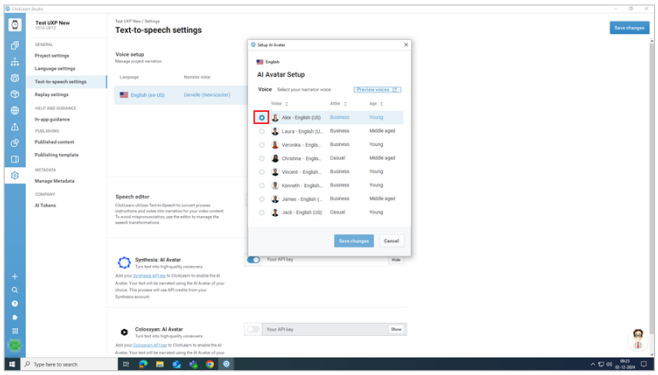
1. Click on the **three-dot menu** against the language you need to add the AI avatar.

   In this case, we are selecting the English US language. If there are multiple language options, you can select any one of your choice.
2. Click on the menu item **Set AI Avatar.**

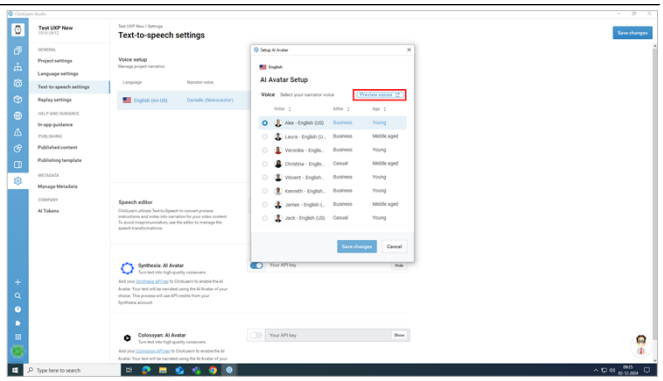


Setup AI Avatar dialogue to preview and select avatar and hit **save changes** to save your selection.

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)**.

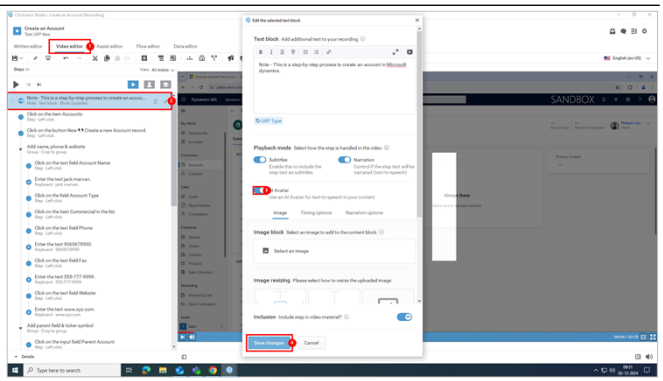


The **Preview voices** button allows you to preview the voice.



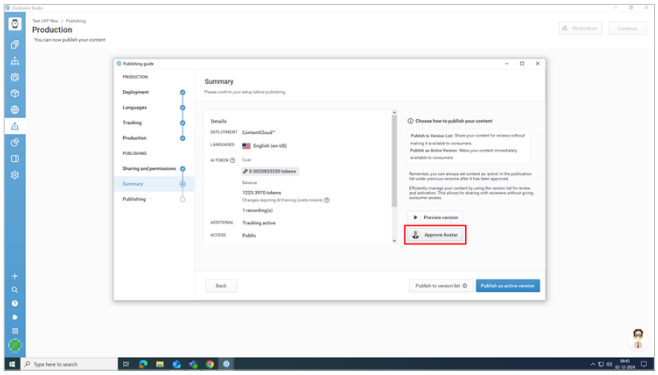
Enable AI Avatar

1. Click on the tab item **Video editor**.
2. Double click on the **note** and apply the changes you desire.
3. Enable/Disable **AI Avatar** settings.
4. Click on the button **Save changes.**

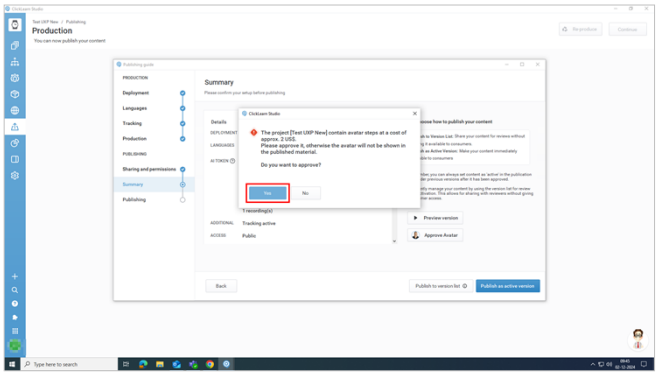


Once you enable AI Avatar, go to publishing and follow the normal publishing process until the summary. In the summary page, Approve the avatar and confirm it.

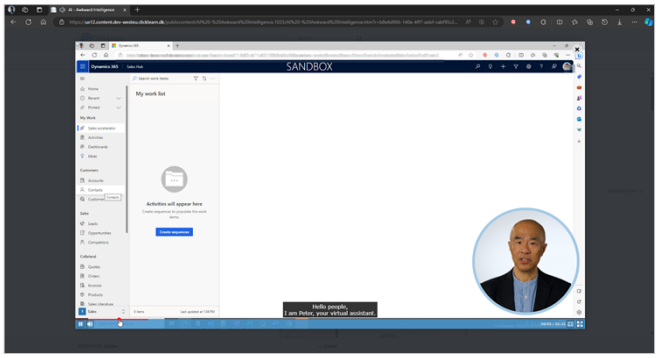
Click on the button **Approve Avatar.**



Click on the button **Yes.**



This is how the screen looks when an AI Avatar is generated. After the AI Avatar is completed, you need to publish the content. This will publish our content with the AI avatar.

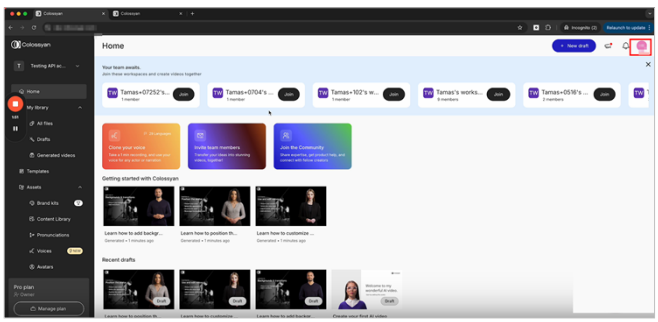


14.3.5.2. Get API key from Colossyan

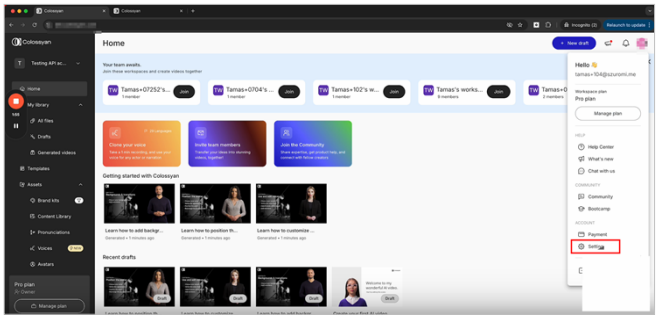
Generate your Colossyan API key in a few clicks to connect AI video creation with ClickLearn Studio, plus enjoy a subscription discount.

Sign up to Colossyan using thislink and use the coupon code **CLICKLEARN20** to get discounts on your subscription.

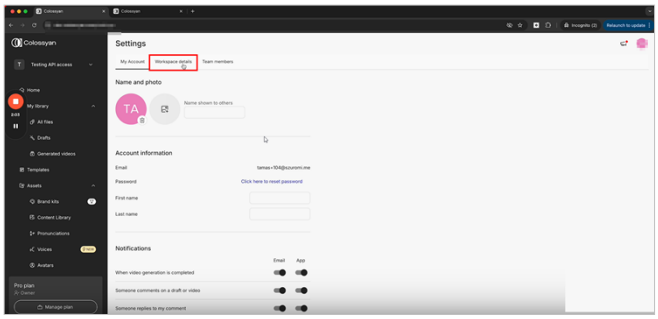
Click on **your profile.**



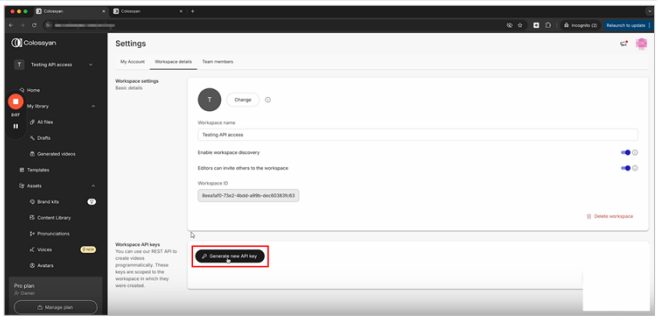
Click on the menu item **Settings.**



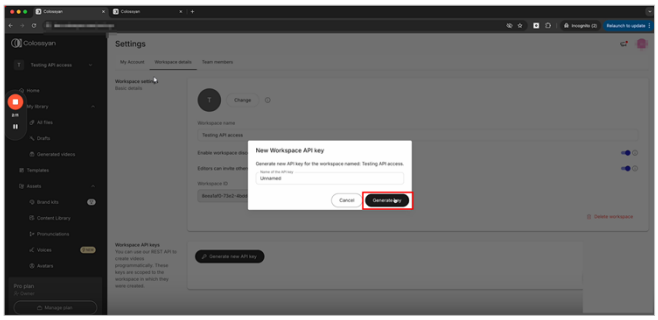
Click on the button **Workspace Details.**



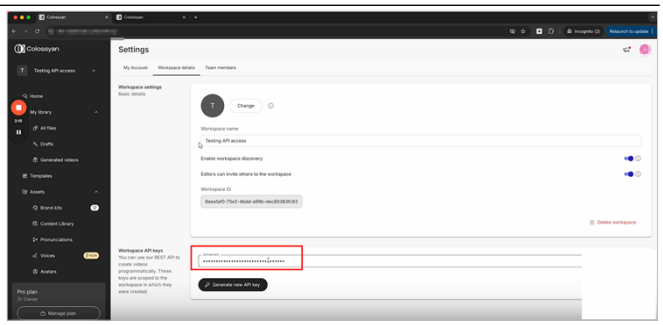
Click on the button **Generate API key.**



Click on the button **Generate.**



Copy this generated API key and use it inside the studio.



14.4.Replay Settings

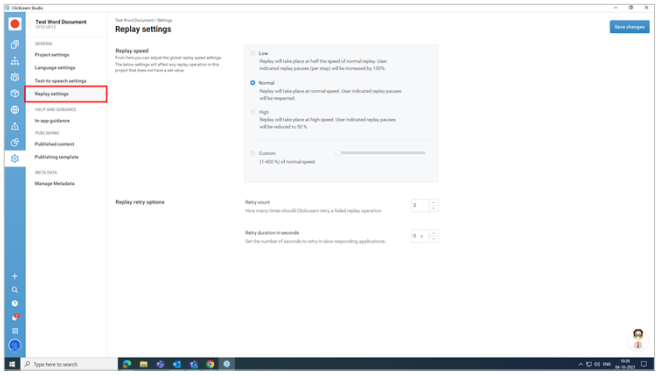
Recordings that keep themselves current, to set replay speed, control retry counts, and fine-tune timing so your content updates automatically without re-recording from scratch.

14.4.1. 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.

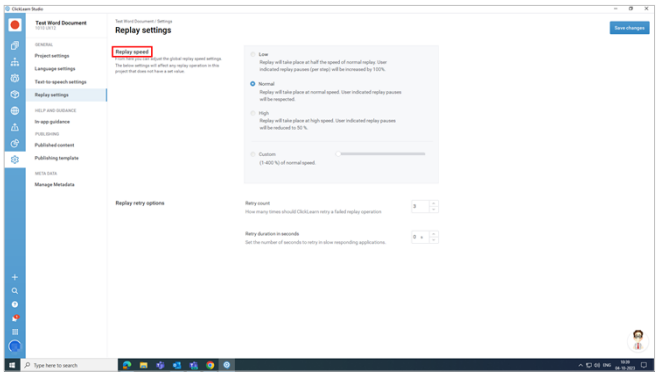
With the help of this feature in ClickLearn Attain, you do not need to re-record everything from scratch when you plan to keep your content current and consistent.

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

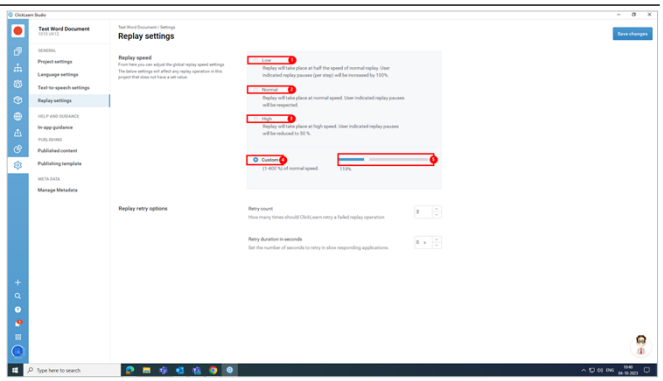


14.4.1.1. Replay Speed

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.



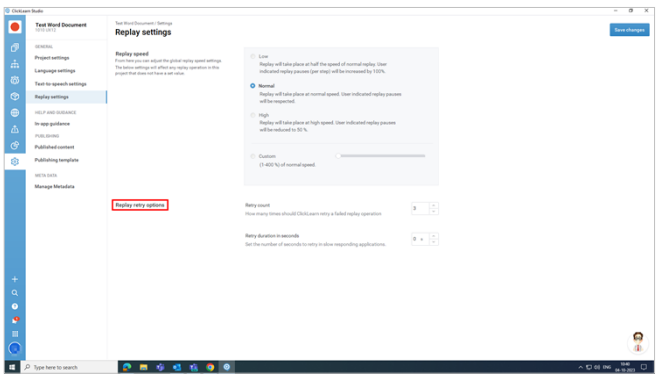
Replay Speed



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.

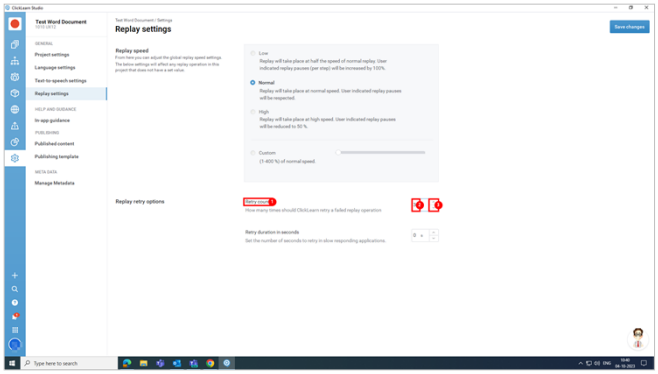
14.4.1.2. Replay Retry Options

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



14.4.1.2.1. Retry Count

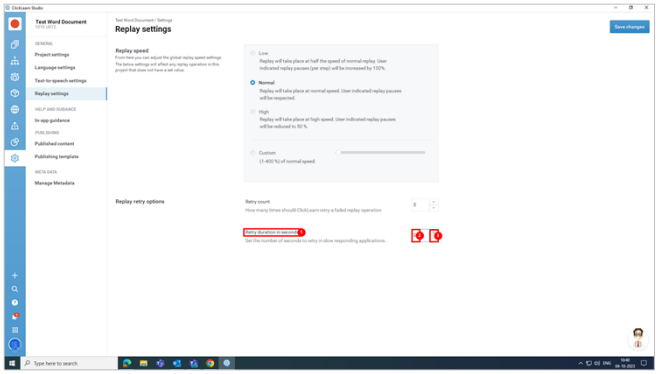
Retry Count



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.

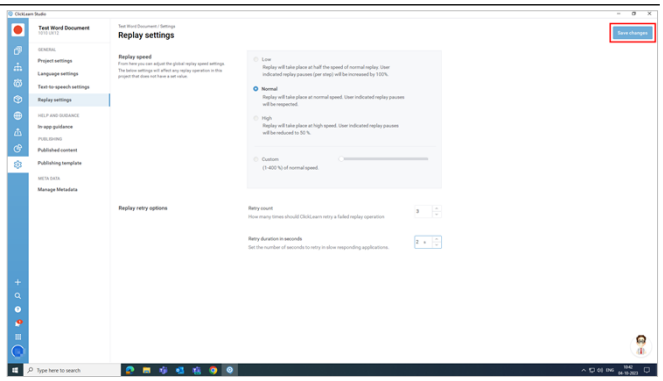
14.4.1.2.2. Retry duration in seconds

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**.



14.5.In-App Tutorials Settings

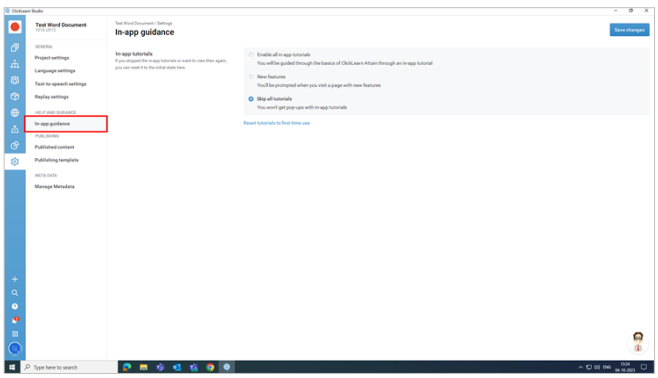
Guided help on your terms, to enable tutorials, get prompts for new features, skip walkthroughs, or reset them anytime without leaving your workflow.

14.5.1. Introduction

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

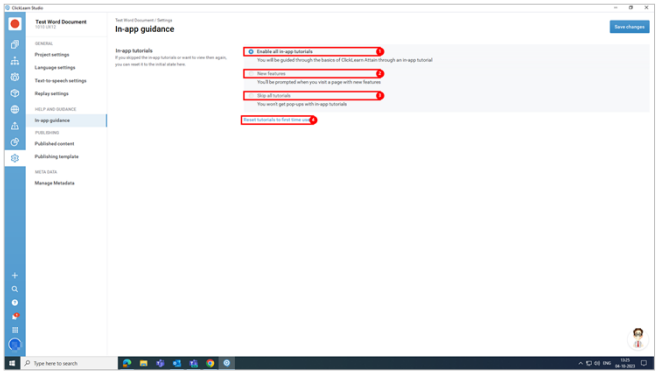
From here, you can adjust the settings of the in-app tutorials.

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



14.5.1.1. In-app tutorials

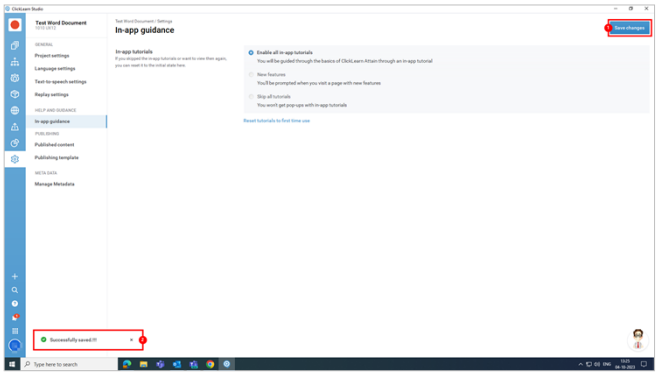
In-app tutorials



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.

14.5.1.2. 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**.

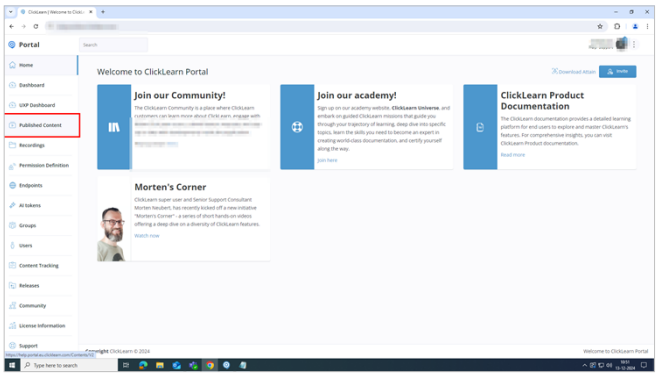
14.6. Manage Published Content

Oversee all published versions of your organisation's content from one place, so you can update permissions, remove outdated versions, and track who has access.

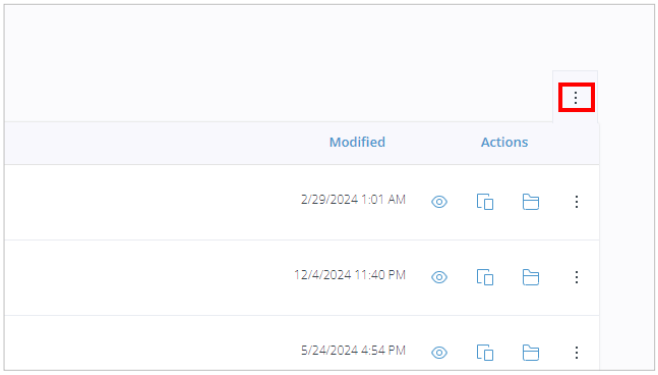
14.6.1. Introduction

Published content refers to material that has already been shared by users within your organization. You can perform various actions and view the users who modified these items.

Click on the link **Published Content.**



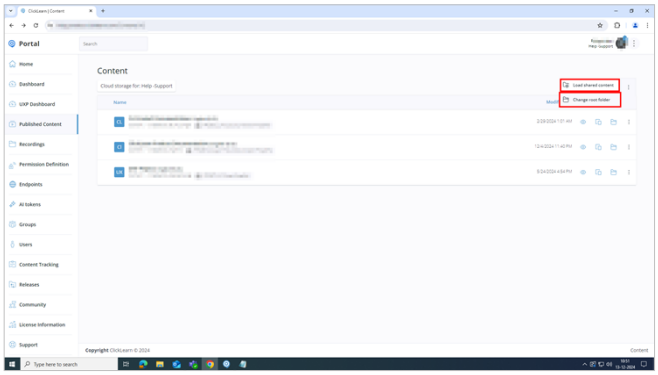
Click on the **three dot button** to open the menu.



14.6.1.1. Other Elements

Other Elements

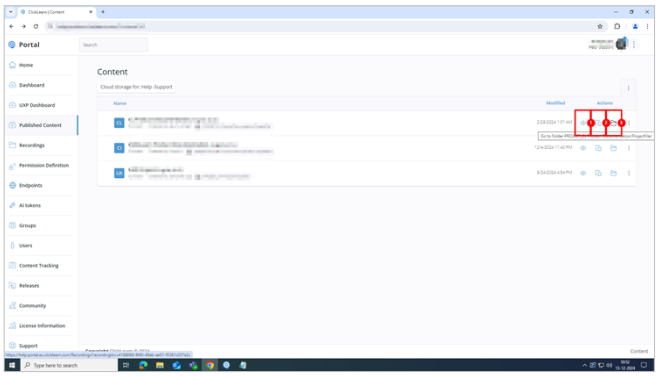
- **Load shared content**: If you share a recording/structure, it will load that particular content.
- **Change root folder**: This option allows you to change the root folder.



14.6.1.1.1. Actions

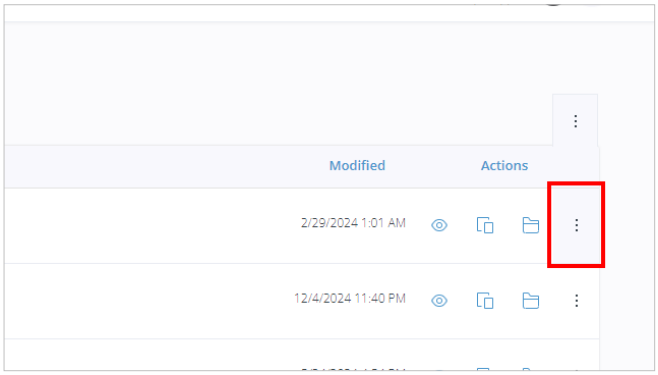
Options associated with the action menu

1. Click on the link **View content** to preview content.
2. Click the **Copy** button to copy the link of the published content for a selected project.
3. Click on the button **Go to Folder** to see all the files of the selected project.



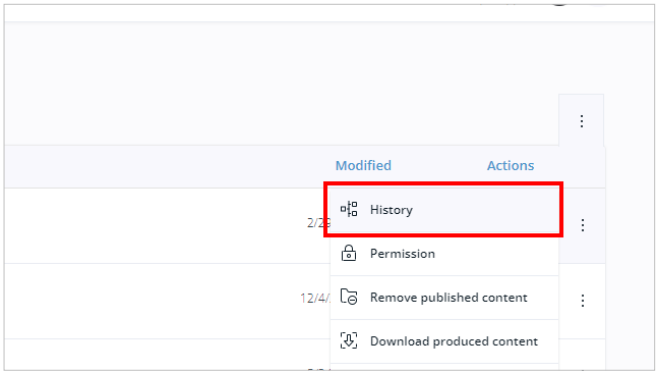
14.6.1.1.2. Open Menu

Click on the **three-dot button** to open a menu.

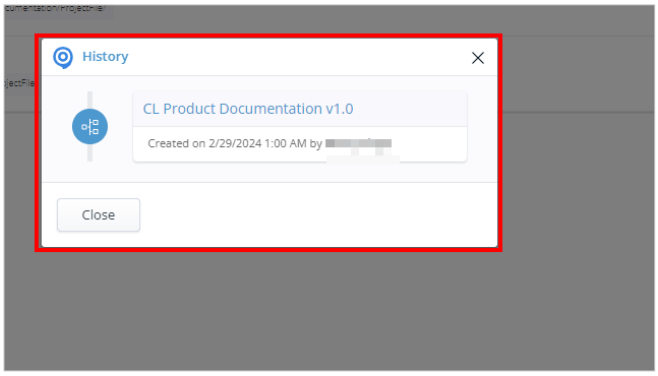


14.6.1.1.3. History

Click on the button **History.**

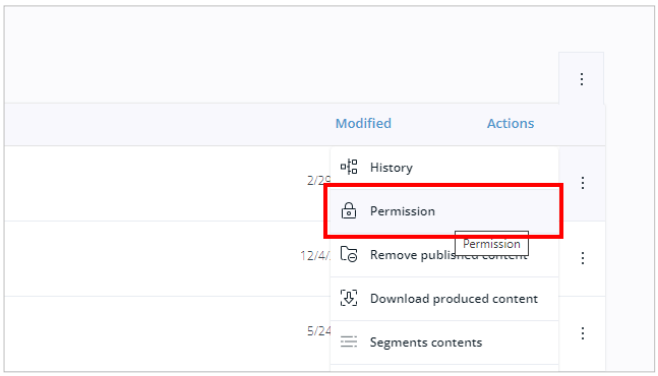


This will display a new pop-up containing details of previous recording versions, including the person who created it with the date and time.



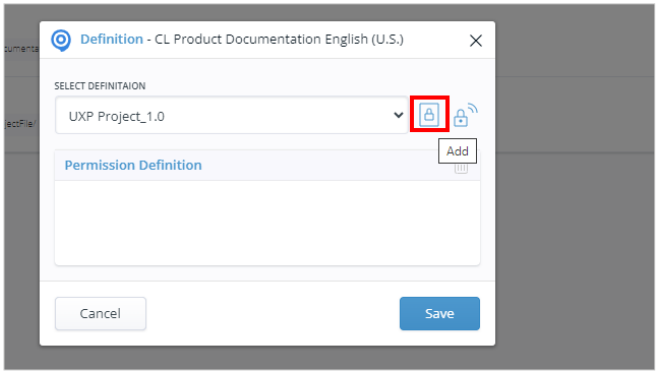
14.6.1.1.4. Permission

Click on the button **Permission.**

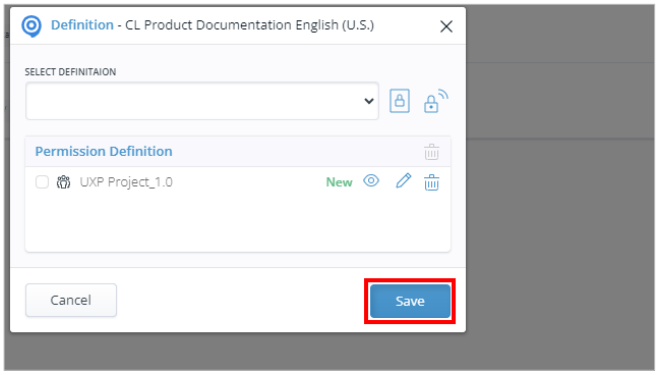


14.6.1.1.5. Add Permission

Select the definition and Click on the button **Add** to add permission.

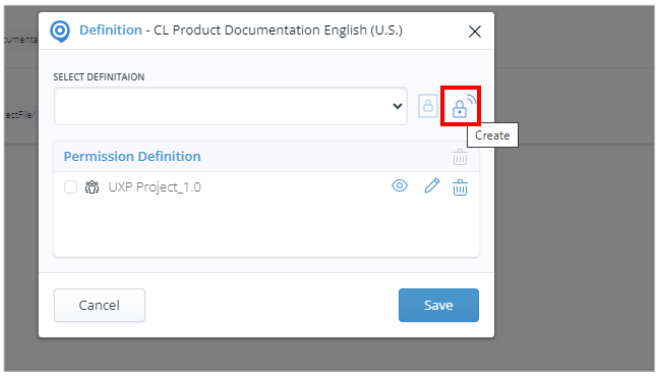


Click on the button **Save** to add permission.

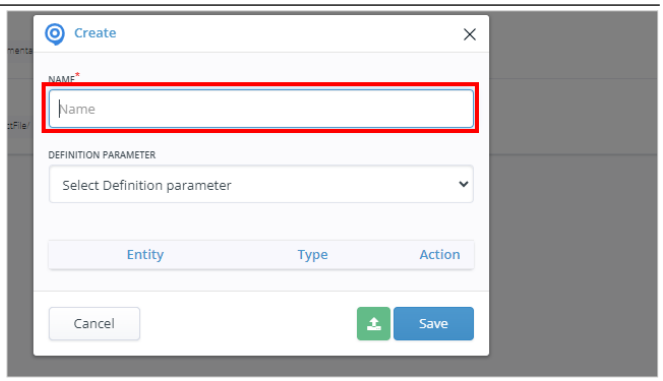


14.6.1.1.6. Create Permission

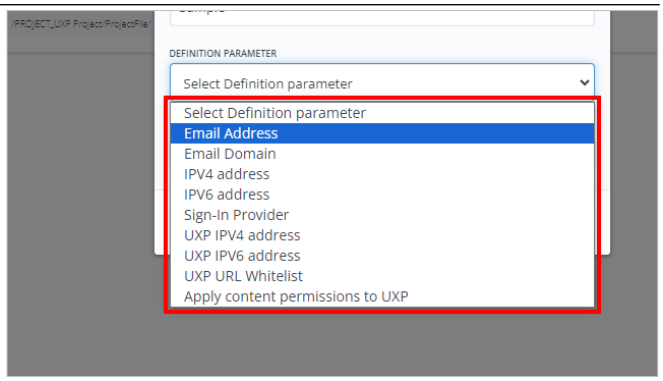
Click on the button **Create** to create permission.



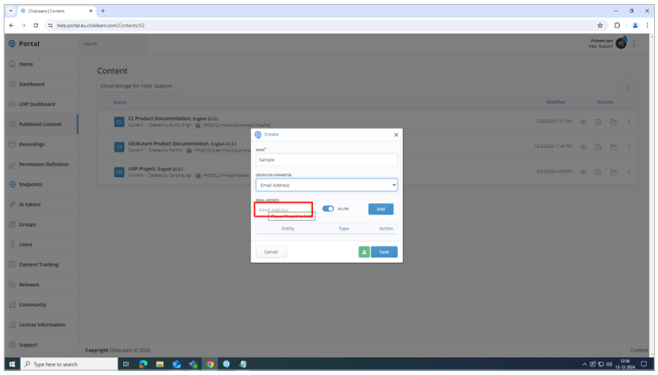
Click on the input field **Name** and enter name.



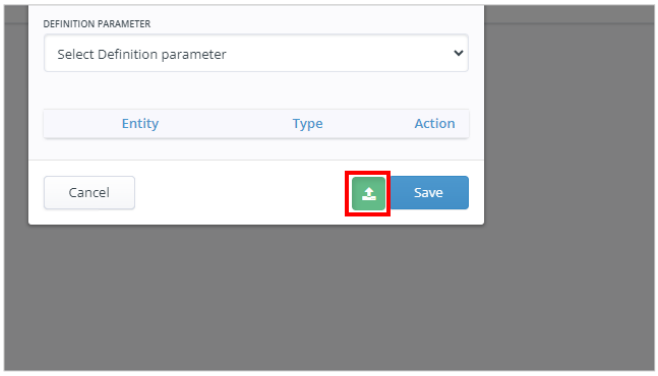
Click on the definition parameter dropdown and select **Email Address** in the list.



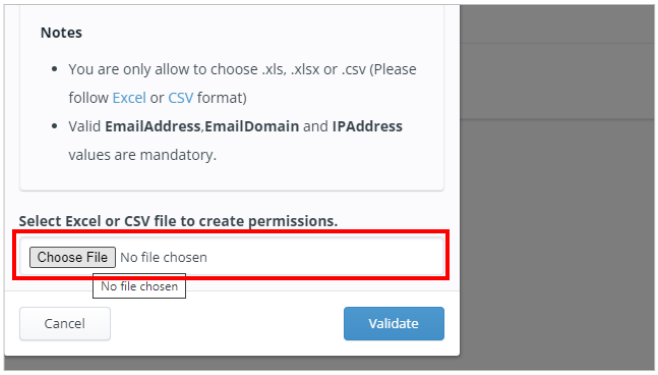
Click on the input field **Email Address** and enter email.



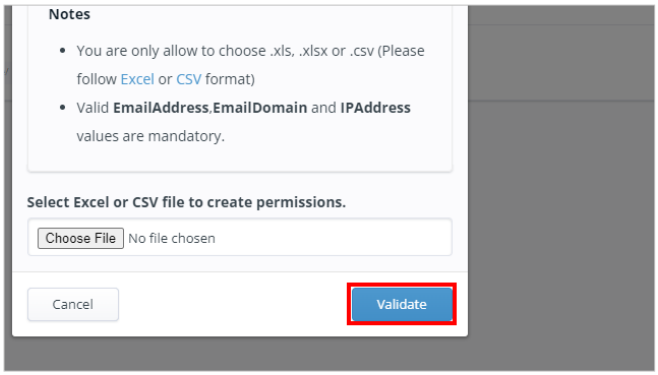
Click on the button **Upload File.**



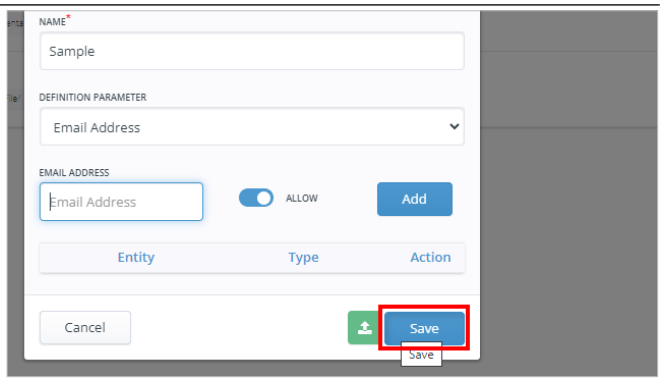
Choose **Excel or CSV** file to create permissions.



Click on **Validate** to validate file.

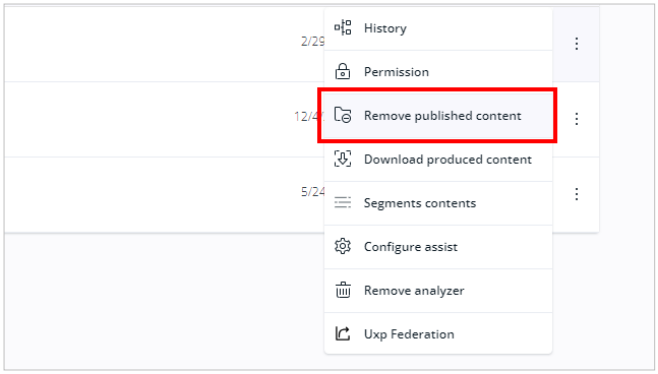


Click on the button **Save.**

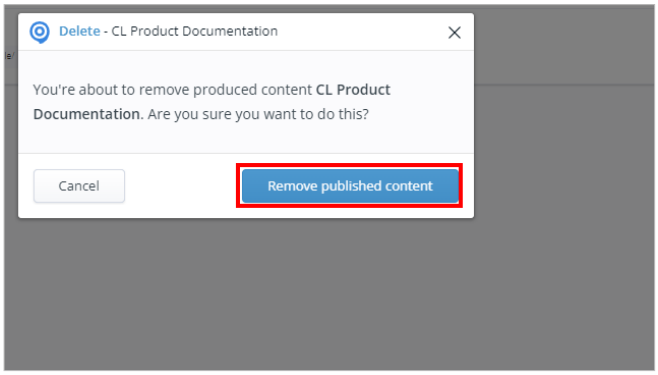


14.6.1.1.7. Remove Published Content

Click on the button **Remove published content.**

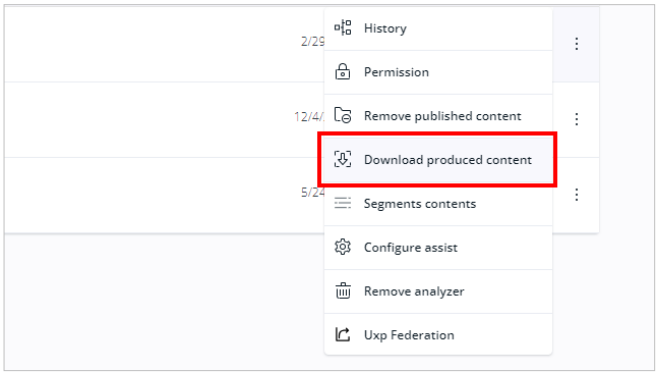


Click on **Remove published content** to delete content.



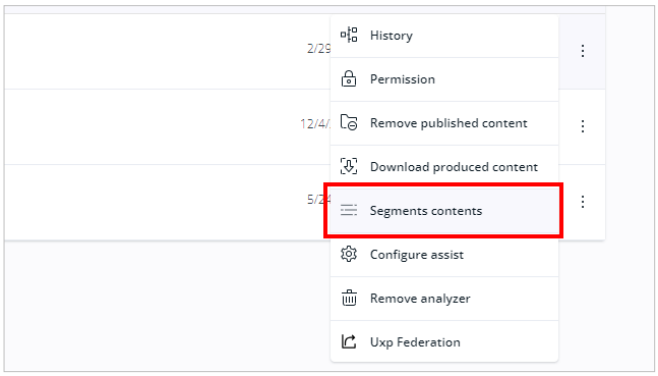
14.6.1.1.8. Download Produced Content

Click on the link **Download produced content** to download published content.



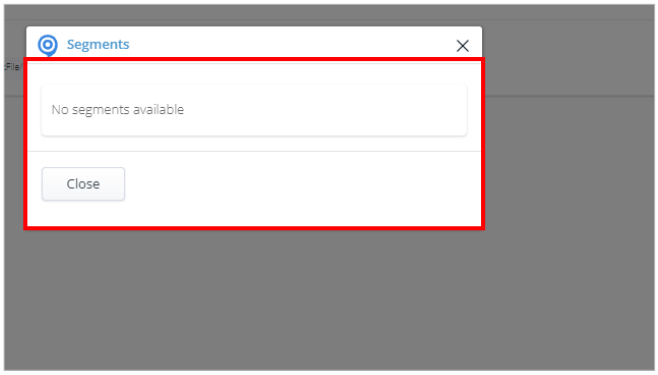
14.6.1.1.9. Segments Contents

Click on the button **Segments contents** to segment content.



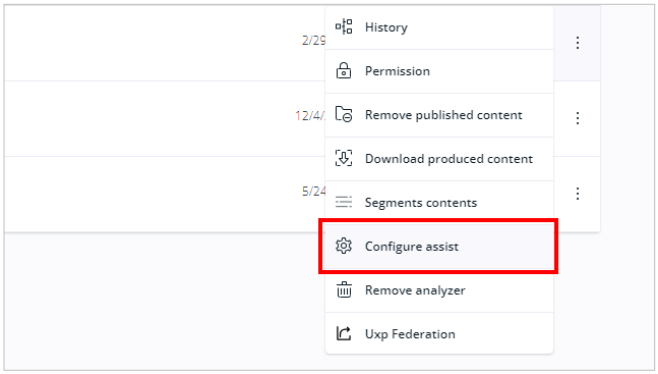
This opens a new pop-up, which shows that currently, there's **no segment available**.

If there are segments, it will show you a list of them.

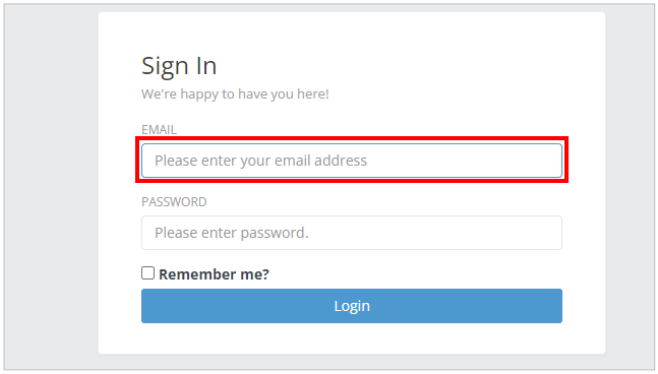


14.6.1.1.10. Configure Assist

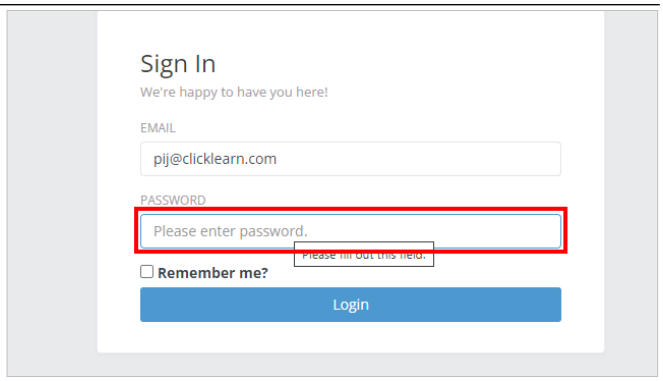
Click on the link **Configure assist.**



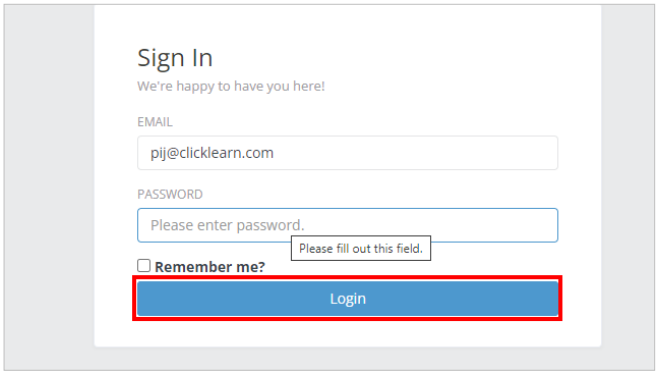
Click on the input field **Please enter your email address** and enter your email.



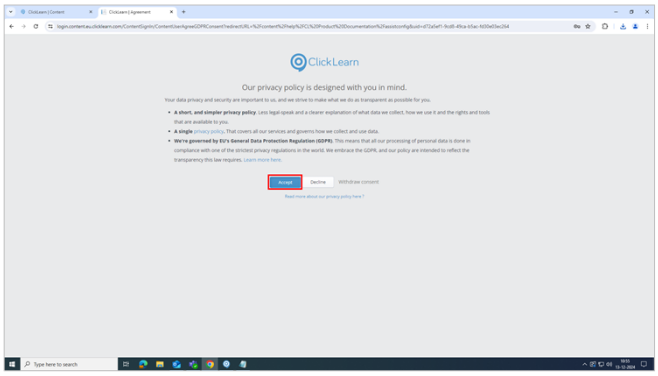
Click on the password field **Please enter password** and enter password.



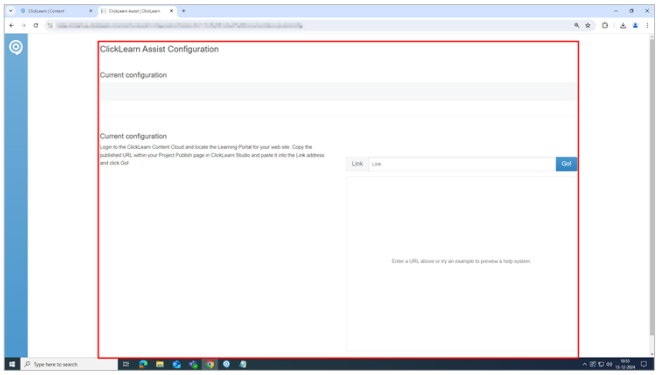
Click on the button **Login**.



Click on the button **Accept** to agree privacy policy.



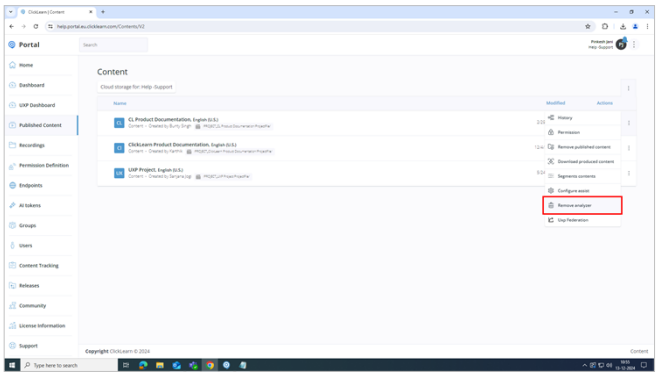
Once you hit the ClickLearn Assist Configuration button, this is how the screen will look. Copy the published URL within your Project Publish page in ClickLearn studio, paste it into the Link Address, and click Go.



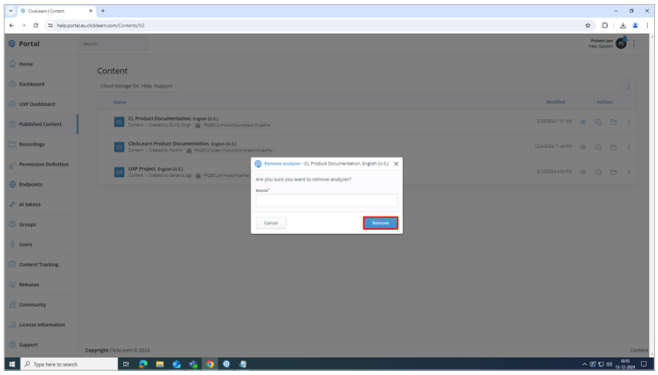
14.6.1.1.11. Remove Analyzer

Click on the link **Remove analyzer.**

The **Remove Analyzer** lets you force a full regeneration of published content when updates do not appear as expected.



When content is republished, the Analyzer reviews previously generated output to identify similarities. Matching items are excluded, and only the differences are generated, which keeps republishing efficient. If this analysis fails, you can delete the analyzer file so that it is regenerated and the system produces the complete content without any exclusions.



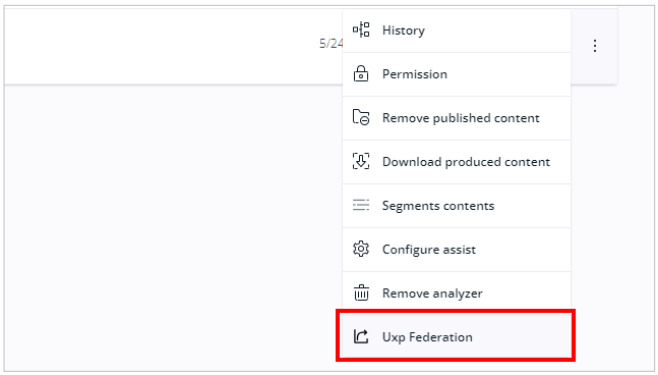
Removing the analyzer and publishing again can resolve the issue and ensure the content updates as expected.

When removing the analyzer, you must enter a Reason for the removal before confirming the action.

Write a reason in the checkbox and click on **Remove**.

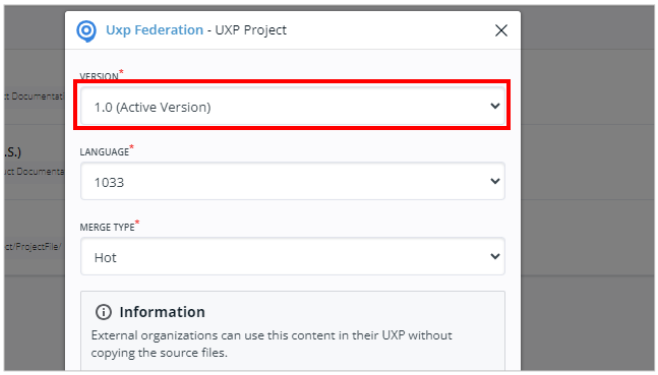
14.6.1.1.12. Uxp Federation

Click on **Uxp Federation**.

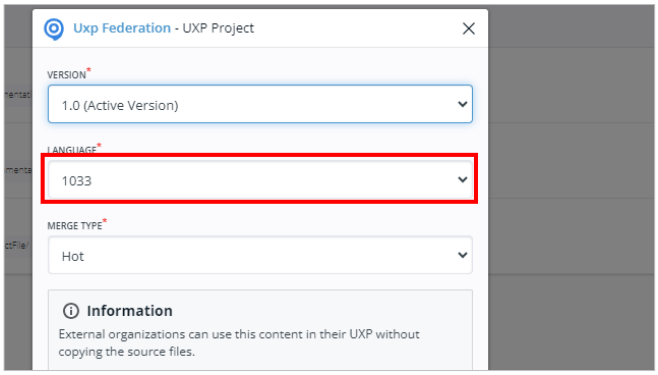


This displays the active version of the project.

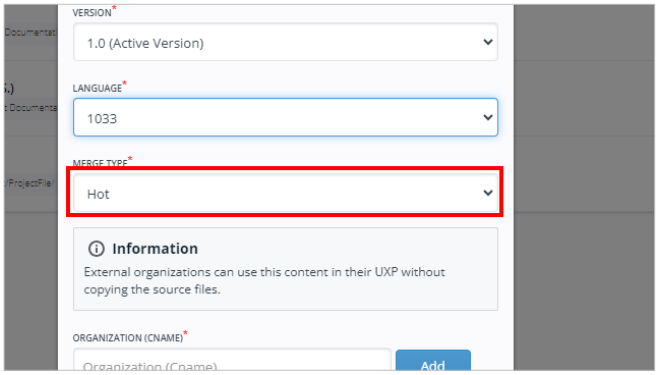
If you have multiple versions, you can choose the version you want to use.



You can select the language of the project.



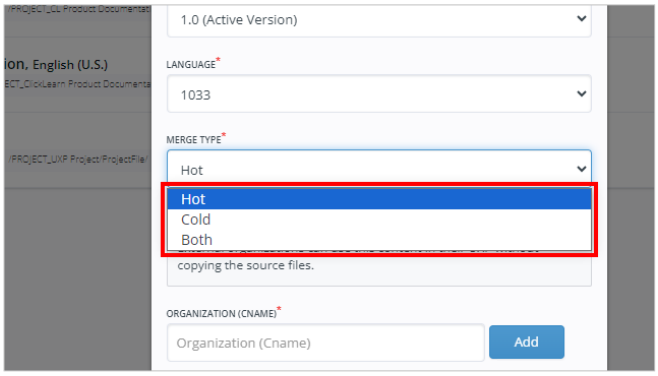
Click on the combo box.



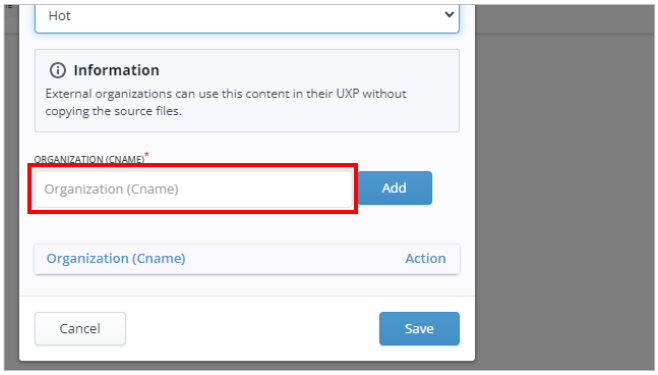
Merge Type: **Hot** merge imports the recordings based on your external structure, allowing you to view them without making any changes.

On the other hand, **cold** merge imports all recordings and files, enabling you to modify and edit them.

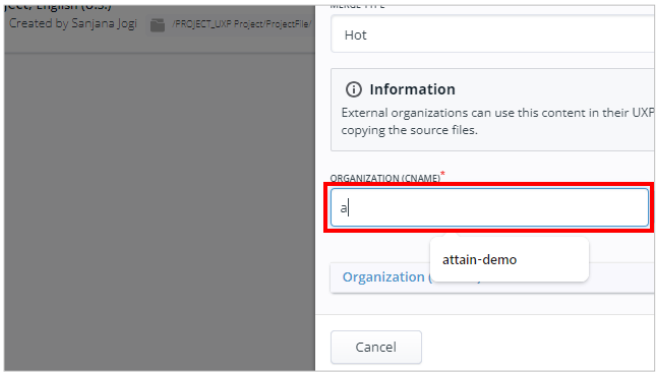
You also have an option to use **both,** which combines the hot and cold merge.



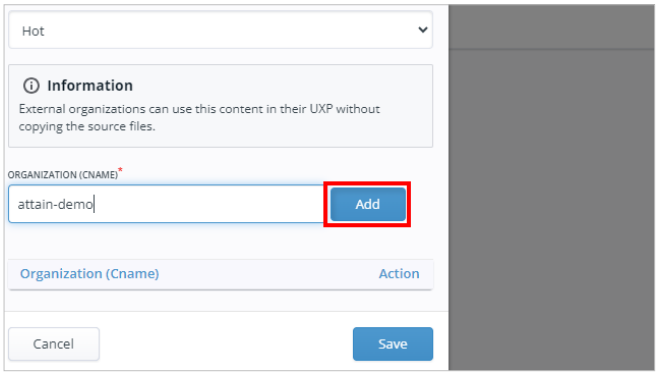
Click on **Organization (Cname).**



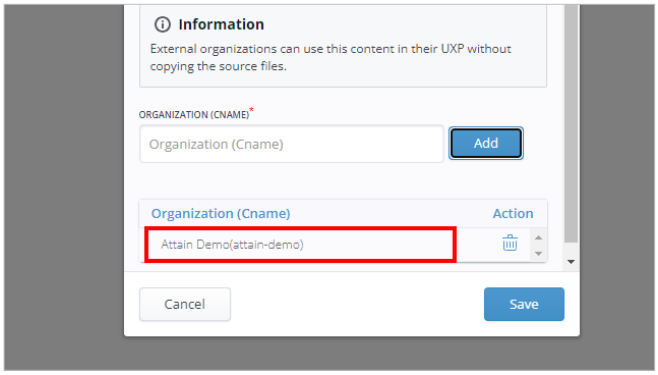
Enter **Organization (Cname)**.
This should be the organization name of the company to which you are sharing the content to be used in UXP.



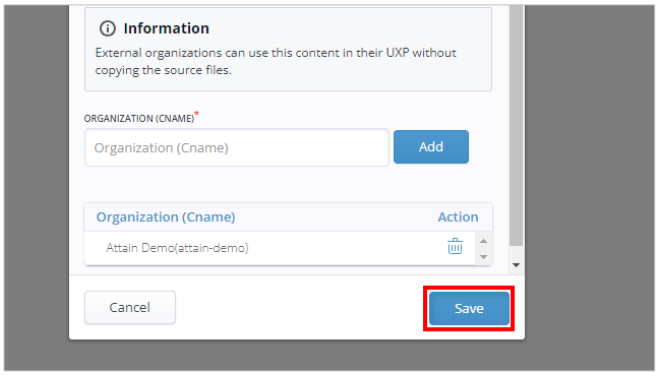
Click on **Add**.



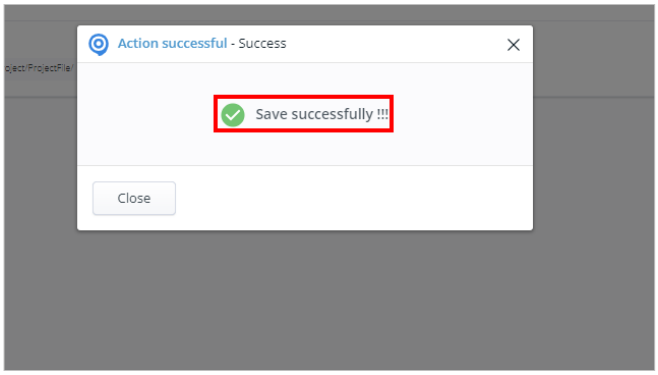
The company Cname **Attain Demo** is created.



Click on **Save.**



This displays the message: **Save successfully**.



14.7.Publishing Template

14.7.1. Overview of Publishing Template

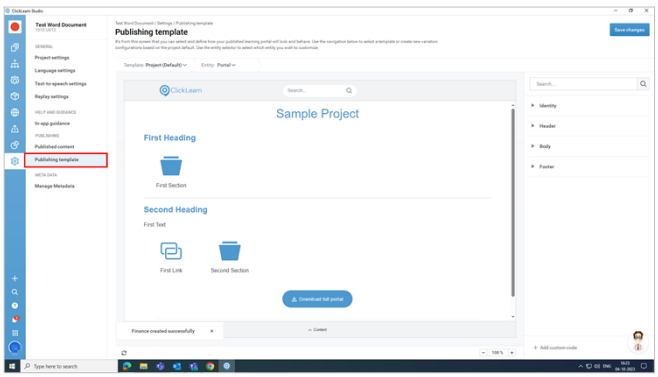
Full control over how your portal looks and works, to start from the default template, add configurations, or import from another project without building the design from scratch.

14.7.1.1. Introduction

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

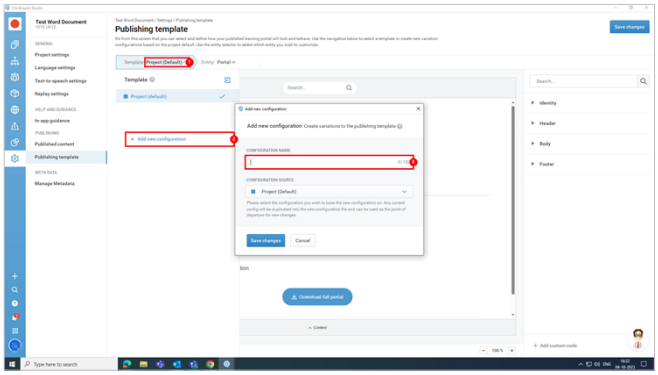
You can use the navigation to choose a template or make a new variation configuration based on the default project.

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



14.7.1.1.1. Publishing Template

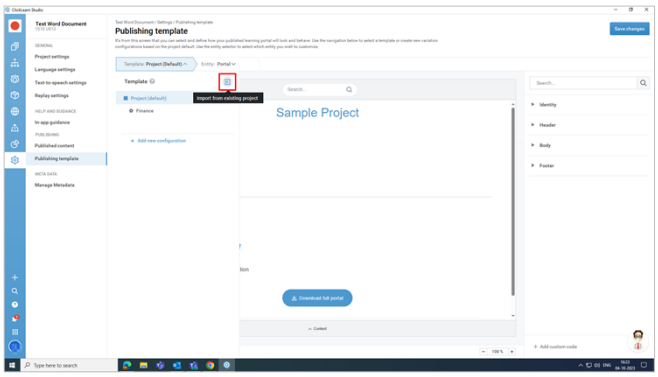
Default Project



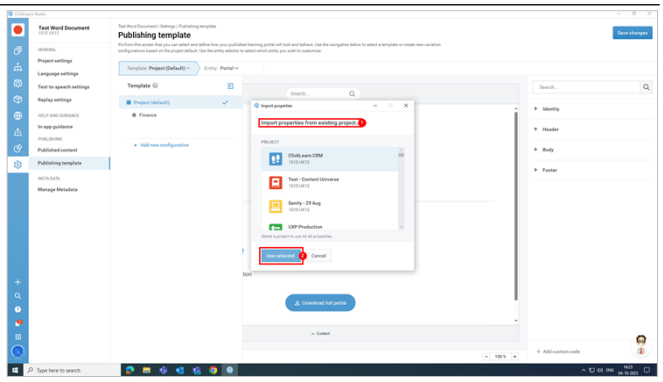
1. **Project (Default):** This is the default template of your ClickLearn Attain project.
2. **Add new configuration:** The template is Project (Default). It will create a sub-template for the project (Default). To create a sub-template, click on **Add new configuration**.
3. It opens with a new dialog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

14.7.1.1.2. Import

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

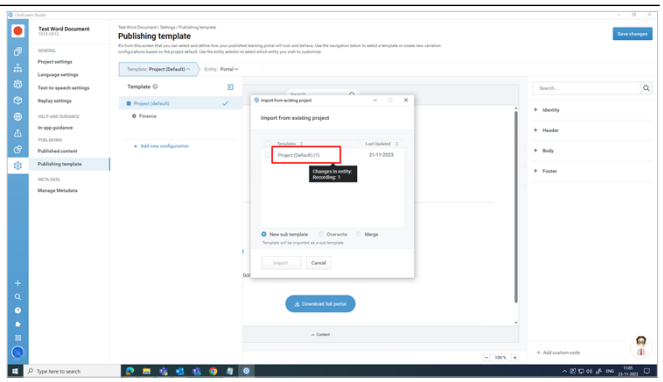


Import Properties



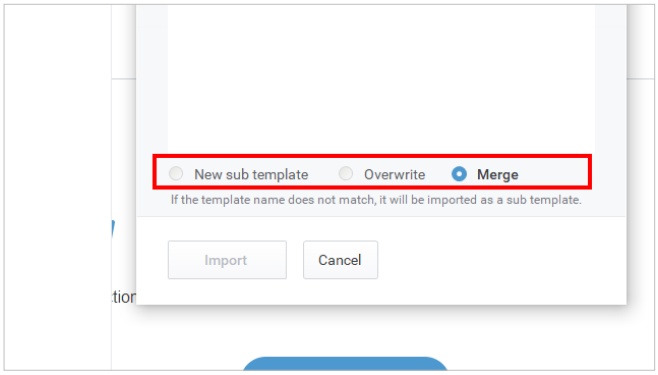
1. This pops up with a new window: **Import properties from existing project**.
2. Select the project with the template you want to import and click "**Use selected**" to open a new dialog box.

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)**.



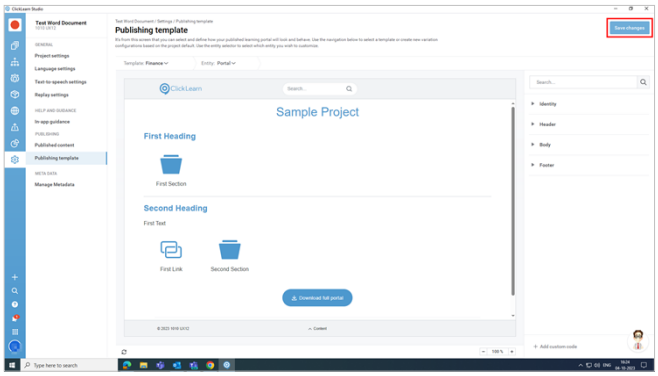
There are three options for how you can import the template.

- **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.



14.7.1.1.3. Save Changes

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



14.7.2. Elements of Publishing Template

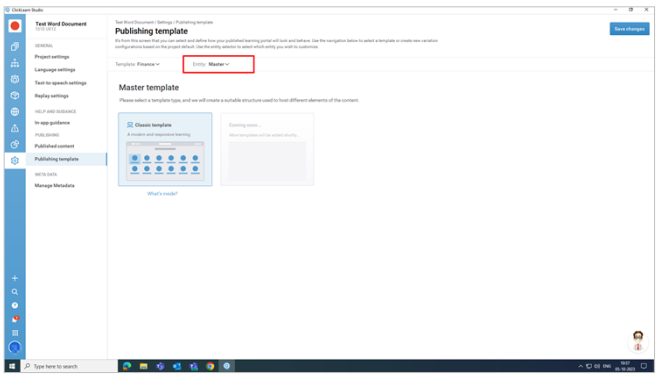
14.7.2.1. Entity Master

Choose the master template that fits your project in ClickLearn Attain, explore what's inside each option, and generate a ready structure for your content elements.

14.7.2.1.1. Entity Master

14.7.2.1.1.1. Master Template

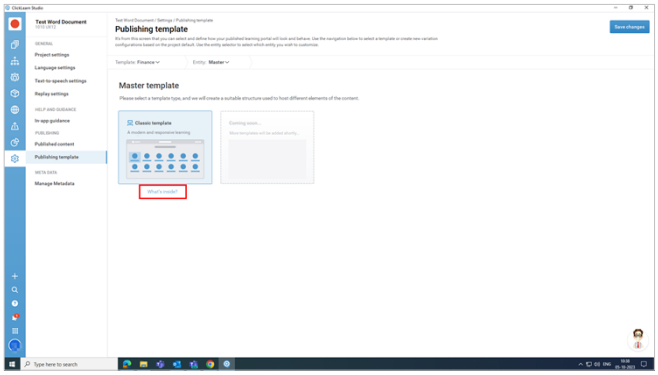
Master: The default template option in ClickLearn Attain is the classic template. You can choose the one that best suits your project needs. And ClickLearn Attain will generate a structure that can accommodate various content elements.



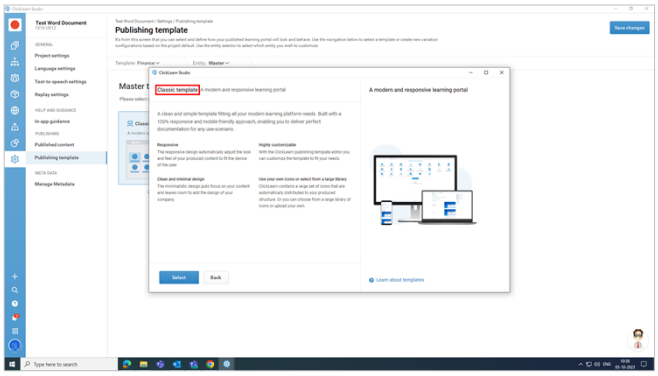
14.7.2.1.1.2. What's Inside?

Choose the master template that fits your project in ClickLearn Attain, explore what's inside each option, and generate a ready structure for your content elements.

To learn more about the Classic template, click the **What's inside?** button. A new window will appear with additional information.

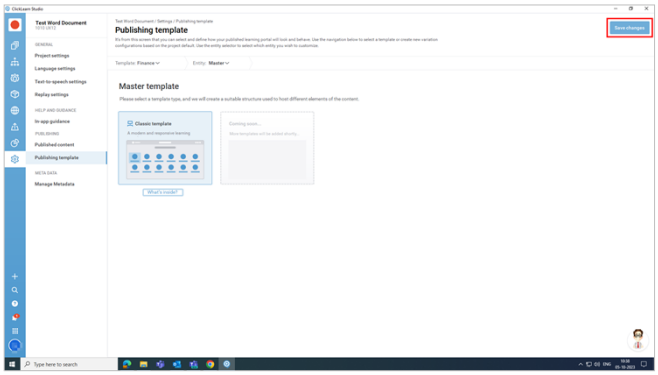


Here, you can find an in-depth overview of the **Classic template**.



14.7.2.1.1.3. Save Changes

Save changes: This will save all your changes in the entity master.



14.7.2.2. Entity Portal

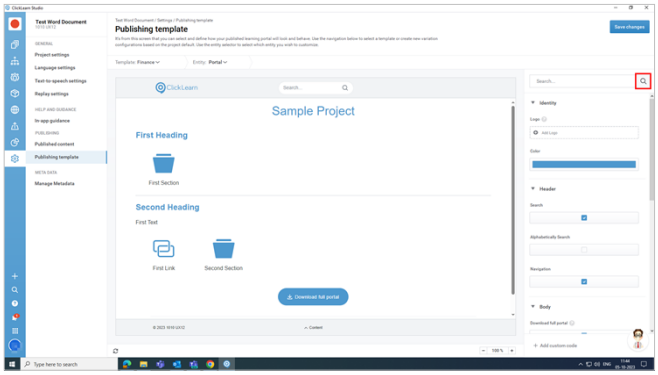
Brand and tailor your learning portal with logos, colors, header search, navigation, descriptions, help links, footer metadata, and custom CSS for a consistent, polished experience.

14.7.2.2.1. Portal

14.7.2.2.1.1. Other entities associated with the portal

14.7.2.2.1.2. Search

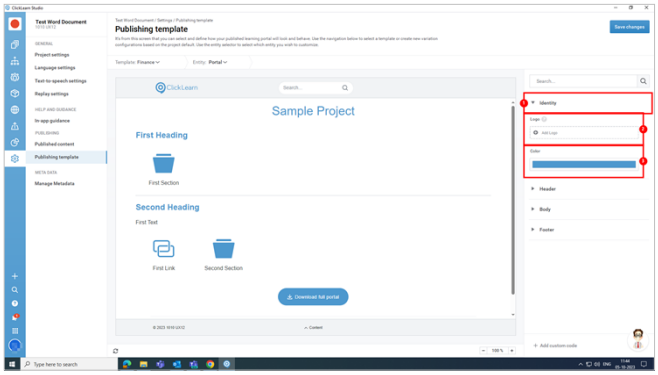
Search: This allows you to search any properties of the components associated with the portal.



14.7.2.2.1.3. Identity

Components of identity

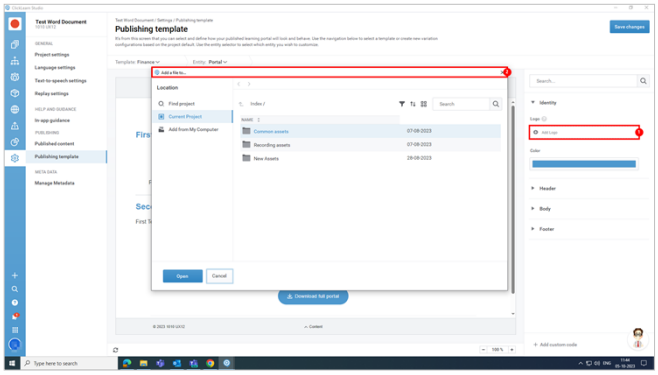
1. **Identity:** You have two choices for customizing your identity: Logo and Color.
2. **Logo:** You can upload a logo from your existing project or local device.
3. **Color:** Based on your preferences, you can adjust the color the elements in your portal.



14.7.2.2.1.4. Add Logo

Adding Logo from

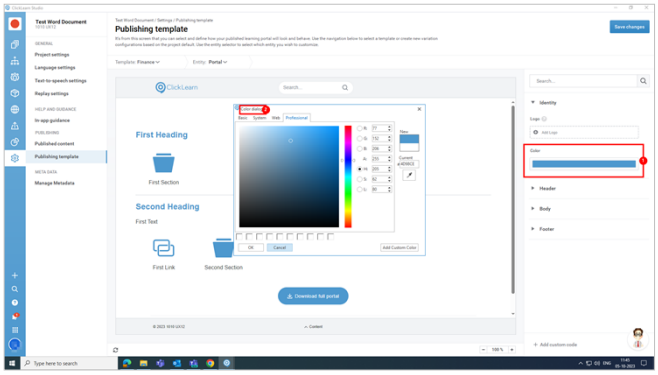
1. Click on the file upload **Add Logo**.
2. It opens with a new window: **Add a file to**, where you can select the file from the current project or the local system.



14.7.2.2.1.5. Color

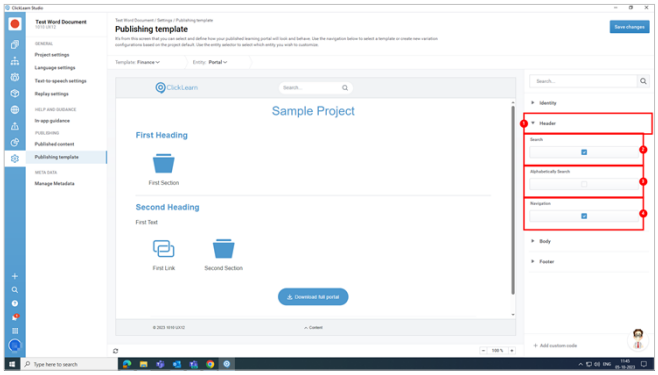
Color Dialog

1. Click on the panel **Color**.
2. It opens with a new window, **Color Dialog**, where you can select the color according to your project needs.



14.7.2.2.1.6. Header

Components of Header

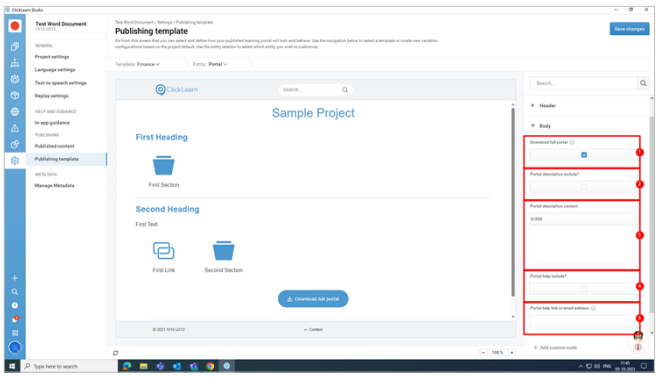


1. You have three choices for customizing your header: Search, Alphabetical Search, and Navigation. Click on the collapsible panel **Header**.

   To use any of these components, simply select the check box.
2. **Search:** This feature lets you add a search bar in your portal's header section to find the necessary recordings and assets.
3. **Alphabetically Search:** This feature lets you sort your content alphabetically.
4. **Navigation:** This feature allows you to add navigation in the header section.

14.7.2.2.1.7. Body

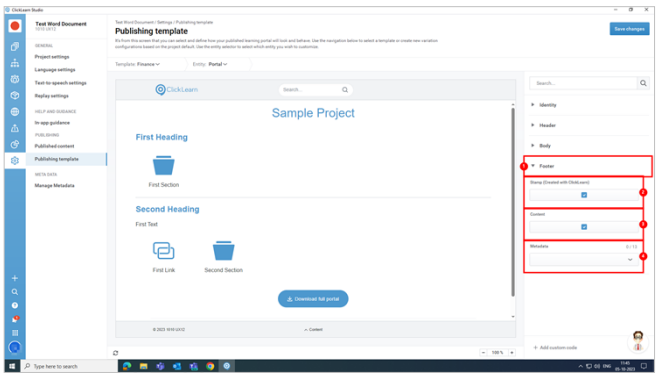
Components of Body



1. **Download full portal:** This lets end users download a PDF of the entire portal and all its contents.
2. **Portal description include:** This feature allows you to have the portal description.
3. **Portal description content:** This feature lets you write more details about your project. The portal description content can have up to 200 words.
4. **Portal help include:** This feature adds the help portal.
5. **Portal help link or email address:** The link or the email address you enter here will redirect the end users.

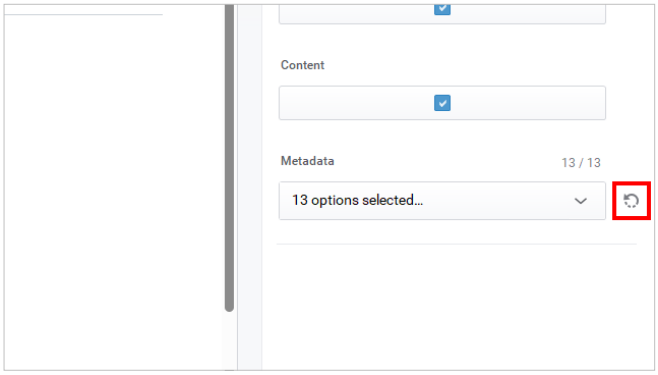
14.7.2.2.1.8. Footer

Components of Footer



1. **Footer:** You have three choices for customizing your footer: Stamp, Content, and Metadata. Click on the collapsible panel **Footer**.
2. **Stamp (Created with ClickLearn):** This will include the stamp in your recording created with ClickLearn Attain.
3. **Content:** With this option, you can easily access different segments within your recordings.
4. **Metadata:** The dropdown is based on the metadata available in the project. This feature allows you to choose the metadata that you wish to display in the published content.

Reset metadata: This button will reset the metadata selection to default.

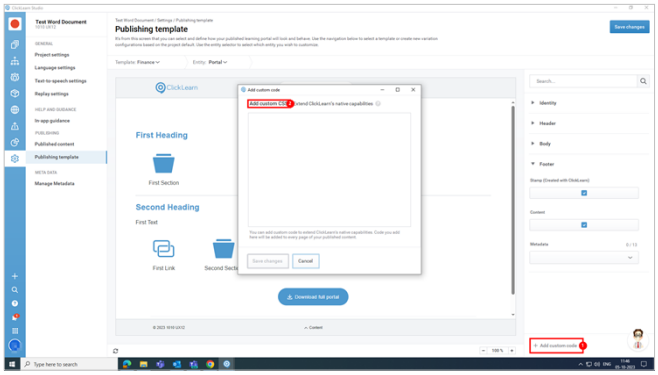


14.7.2.2.1.9. Add custom code

Custom code

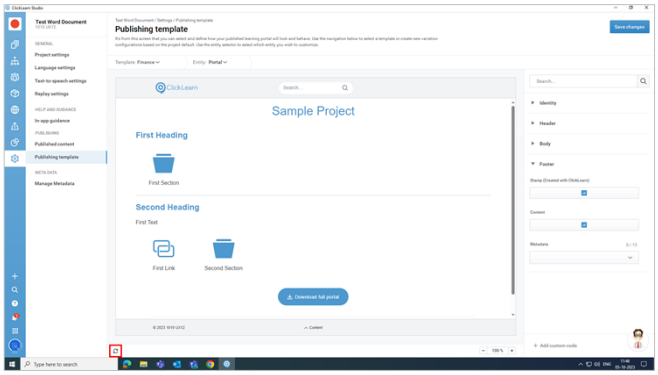
1. Click on the button **Add custom code**.
2. **Add custom code:** Add custom code (**Add custom C S S**) to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



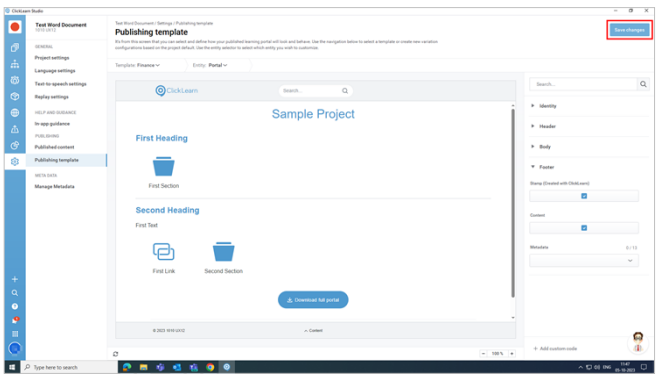
14.7.2.2.1.10. Refresh

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



14.7.2.2.1.11. Save Changes

Save changes: This will save all your changes in the entity portal.

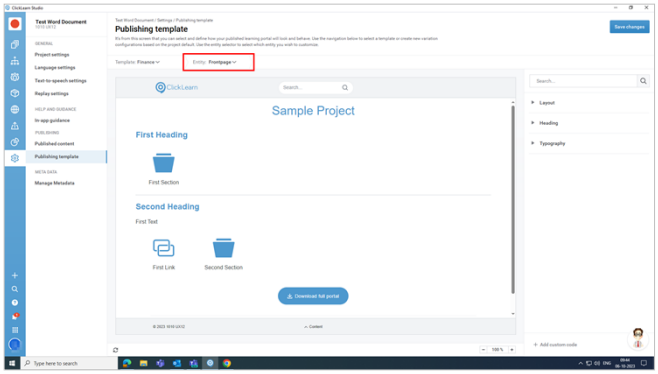


14.7.2.3. Entity Frontpage

Design an engaging learning portal frontpage with flexible grid or list layouts, numbered headings, custom typography, and CSS styling that improves usability for end users.

14.7.2.3.1. Frontpage

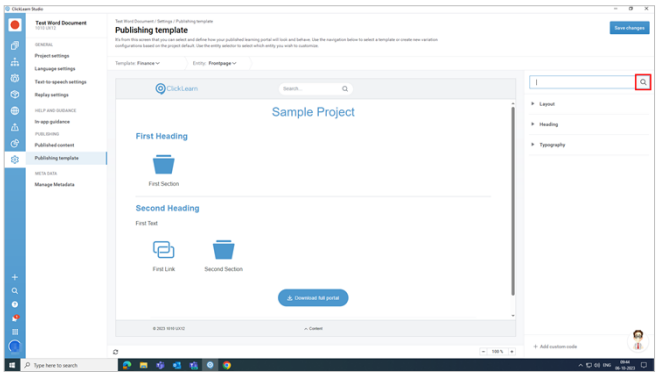
Frontpage: This is the main page of your learning portal, where you can customize the look and feel of your content. Frontpage will enhance the engagement and usability of your learning portal for your end users.



14.7.2.3.1.1. Other entities associated with the frontpage

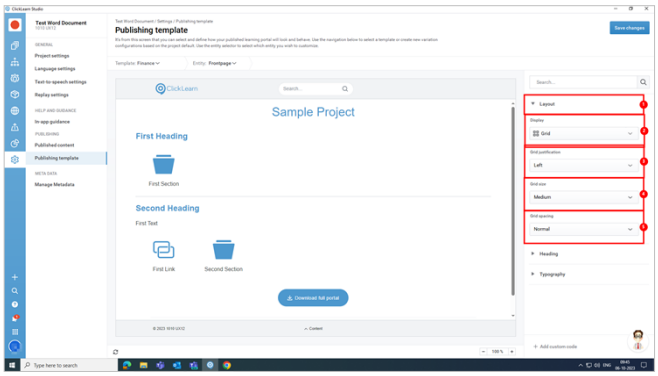
14.7.2.3.1.2. Search

Search: This allows you to search any properties of the components associated with the front page.



14.7.2.3.1.3. Layout

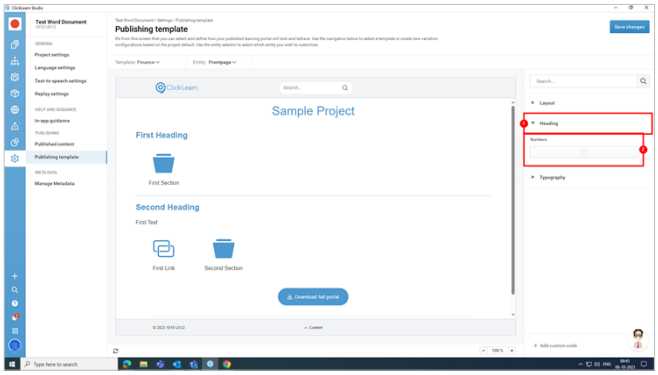
Components of Layout



1. **Layout:** Click on the collapsible panel **Layout**. You can change the appearance and style of your learning portal.
2. **Display:** You can choose between a grid display or a list display for your content.
3. **Grid justification:** You can adjust the alignment of the grid as left, center, or right.
4. **Grid size:** You can set the grid size as small, medium, or large.
5. **Grid spacing:** You can select the grid spacing as compact, normal, or spacious.

14.7.2.3.1.4. Heading

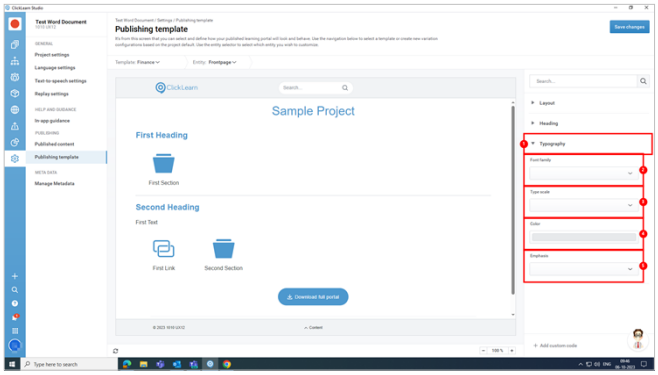
Components of Heading



1. **Heading:** Click on the collapsible panel **Heading**. You can customize the heading options from here.
2. **Numbers:** You can include **Numbers** in your headings.

14.7.2.3.1.5. Typography

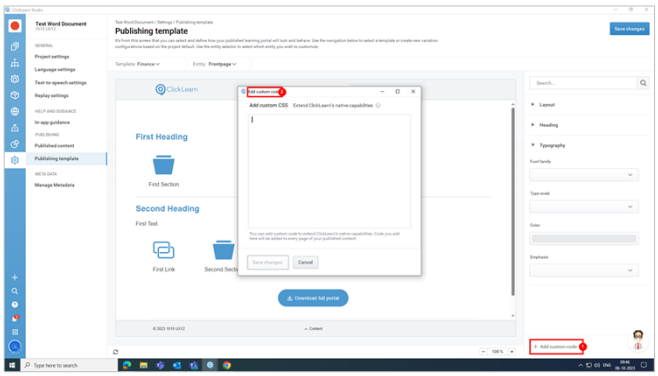
Components of Typography



1. **Typography:** This option enables you to customize the typography of your learning portal, such as font, color, etc. Click on the collapsible panel **Typography**.
2. **Font family:** You can choose the fonts from the options available in the list.
3. **Type scale:** You can adjust the font size to small, medium, or large.
4. **Color:** You can choose the font color from the color dialog box.
5. **Emphasis:** Emphasis enables you to make your text bold, italic, or underlined.

14.7.2.3.1.6. Add custom code

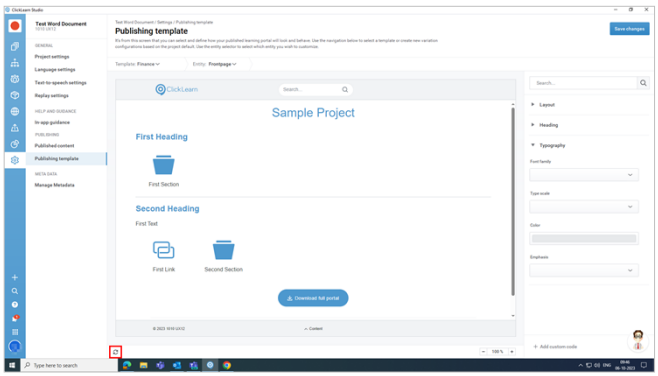
Custom code



1. Click on the button **Add custom code**.
2. **Add custom code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.

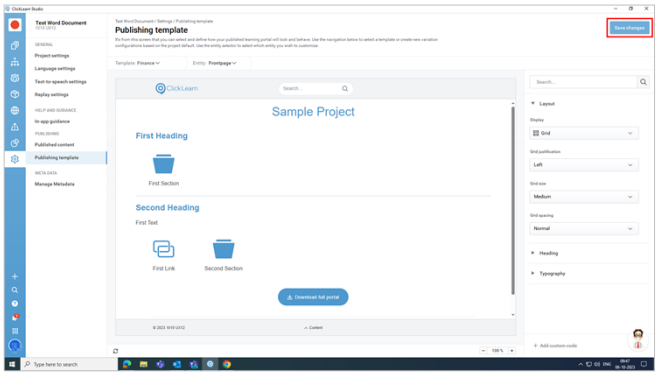
14.7.2.3.1.7. Refresh



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

14.7.2.3.1.8. Save Changes

Save changes: This will save all your changes on the entity frontpage.

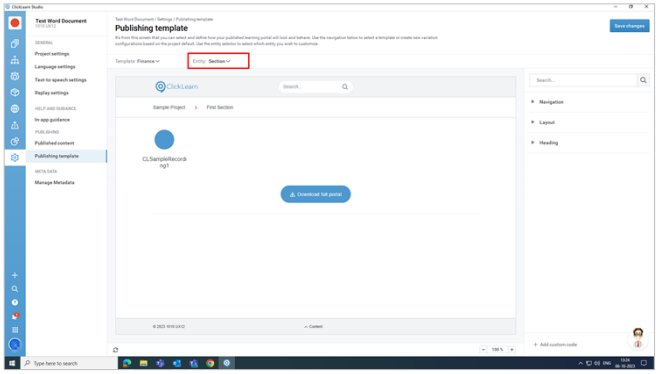


14.7.2.4. Entity Section

Organize learning content into clear topic sections with breadcrumb navigation, flexible layouts, auto-generated icons, and custom styling that help learners find what they need faster.

14.7.2.4.1. Section

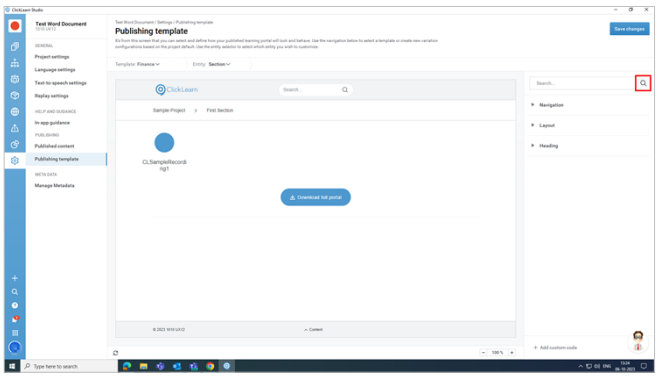
Section: A section is a way of organizing your content into different categories or topics. You can create a section by dragging and dropping it from the right-side pane into the structure editor. Each section has properties you can set in the right-side pane, such as title, icon, and color.



14.7.2.4.1.1. Other entities associated with the section

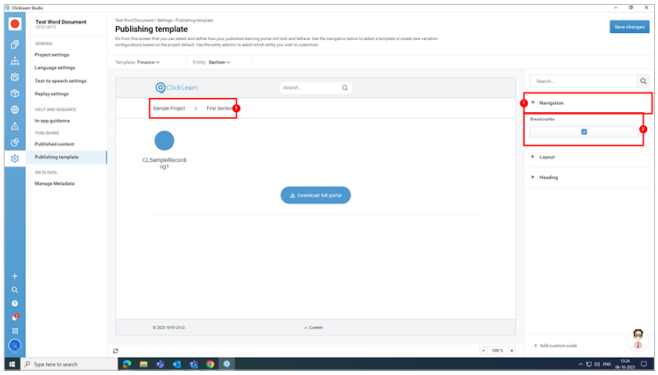
14.7.2.4.1.2. Search

Search: This allows you to search any properties of the components associated with the section.



14.7.2.4.1.3. Navigation

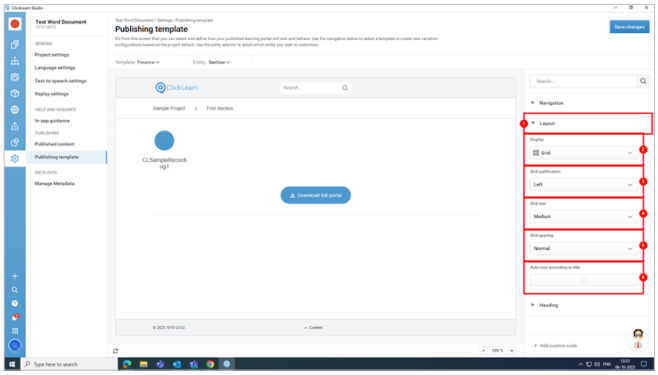
Component of Navigation



1. **Navigation:** Used when navigating to and fro within your learning portal.
2. **Breadcrumbs:** Breadcrumbs are a navigation feature that shows the user's current location in the learning portal structure.
3. A horizontal list of links is displayed at the top of the portal page, separated by a symbol, usually an arrow.

14.7.2.4.1.4. Layout

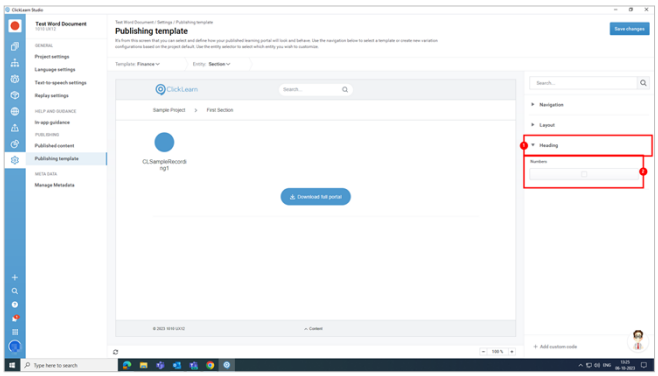
Components of Layout



1. **Layout:** Click on the collapsible panel **Layout**. You can change the appearance and style of your learning portal.
2. **Display:** You can choose between a grid display or a list display for your content.
3. **Grid justification:** You can adjust the alignment of the grid as left, center, or right.
4. **Grid size:** You can set the grid size as small, medium, or large.
5. **Grid spacing:** You can select the grid spacing as compact, normal, or spacious.
6. **Auto icon according to title:** It auto-generates an icon based on the project's title.

14.7.2.4.1.5. Heading

Component of Heading



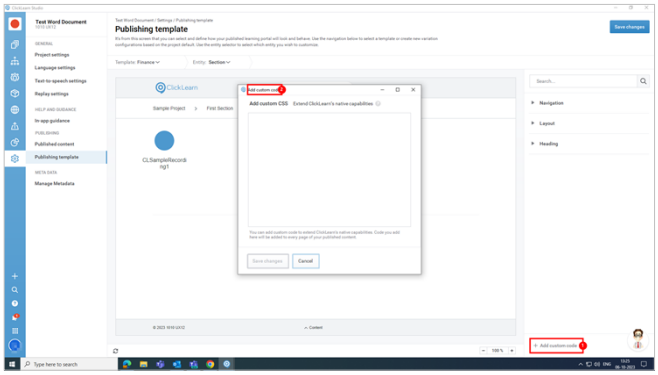
1. **Heading:** You can customize the heading options from here.
2. **Numbers:** You can include numbers in your headings.

14.7.2.4.1.6. Add custom code

Custom code

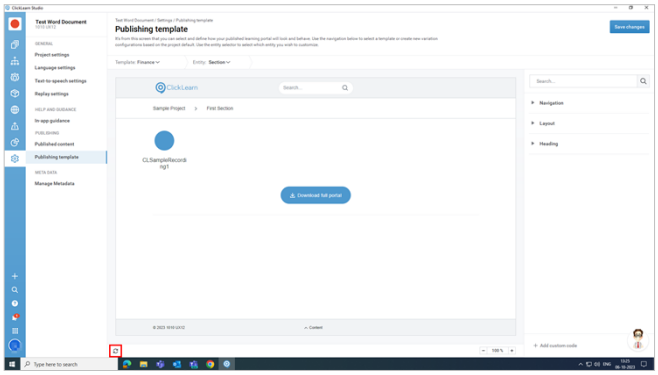
1. Click on the button **Add custom code**.
2. **Add custom code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



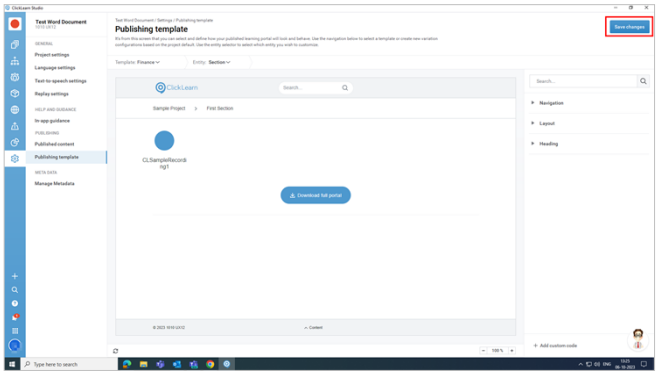
14.7.2.4.1.7. Refresh

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



14.7.2.4.1.8. Save Changes

Save changes: This will save all your changes in the entity section.

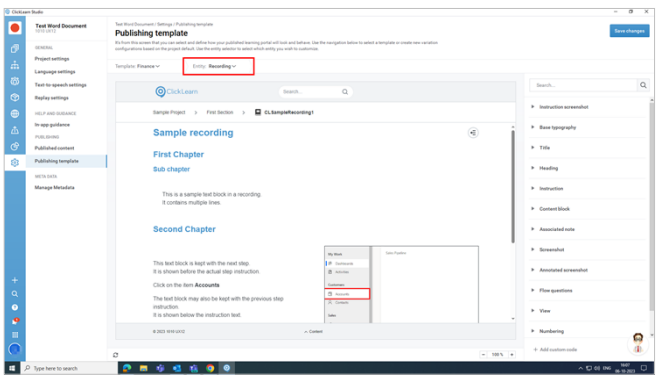


14.7.2.5. Entity Recording

Customize every detail of published recordings, from screenshots, typography, and notes to start views, step numbering, and annotation modes, for consistent, learner-friendly training content.

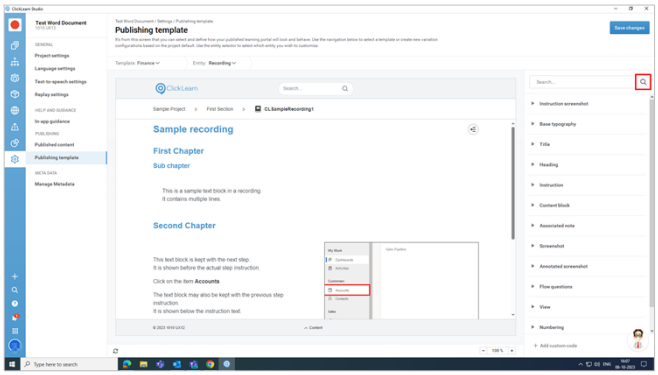
14.7.2.5.1. Recording

Recording: This screen displays what your sample recording looks like.



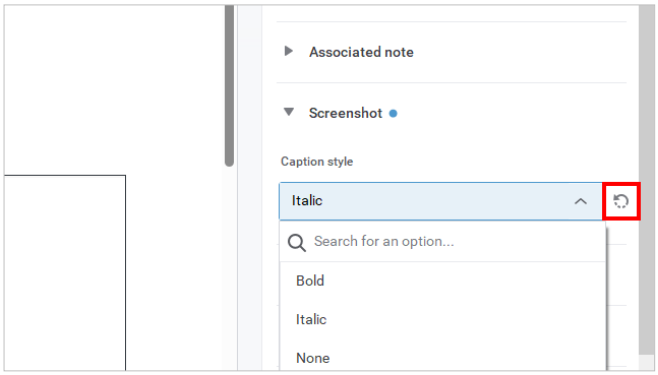
14.7.2.5.1.1. Search

Search: This allows you to search any properties of the components associated with recording.



14.7.2.5.1.2. Reset

Reset: This icon is associated with every entity that resets the value to its original position.



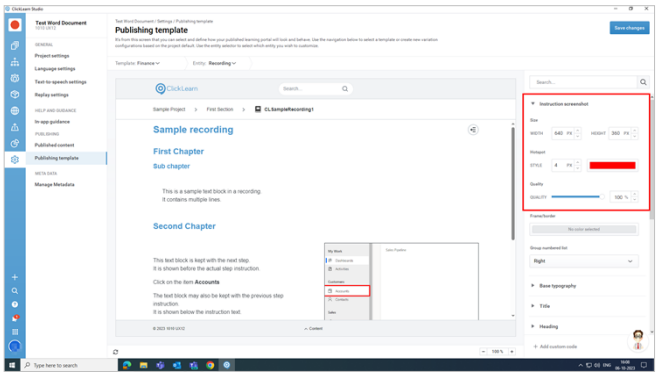
14.7.2.5.2. Other entities associated with the recording

14.7.2.5.2.1. Instruction Screenshot

Instruction screenshot: You can adjust the screenshot settings from the **Instruction screenshot** panel.

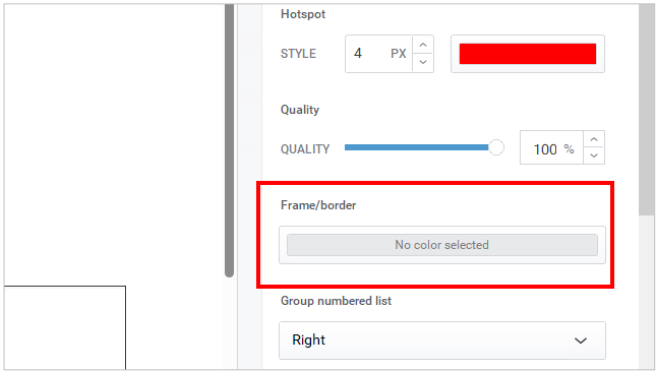
You can adjust the following settings based on your project requirements.

- Width of the screenshot.
- Height of the screenshot.
- Style: Thickness of the highlight hotspot.
- Color of the highlight hotspot.
- Quality Percentage of the screenshot.



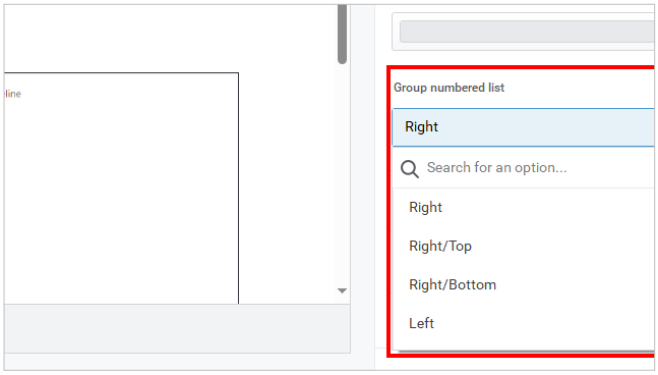
14.7.2.5.2.2. Frame Border

Frame/border: You can set the border color for your frame.



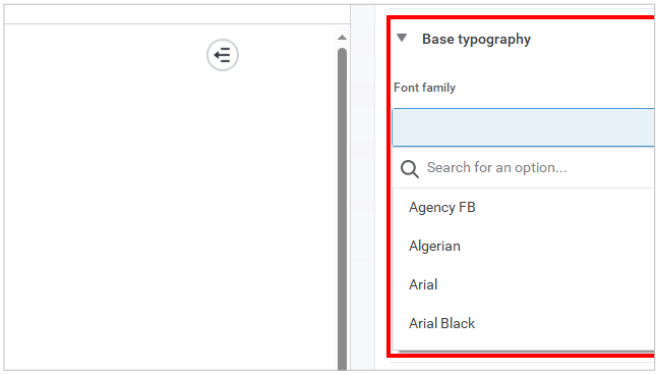
14.7.2.5.2.3. Group numbered list

Group numbered list: You can align the numbered steps according to your preference.



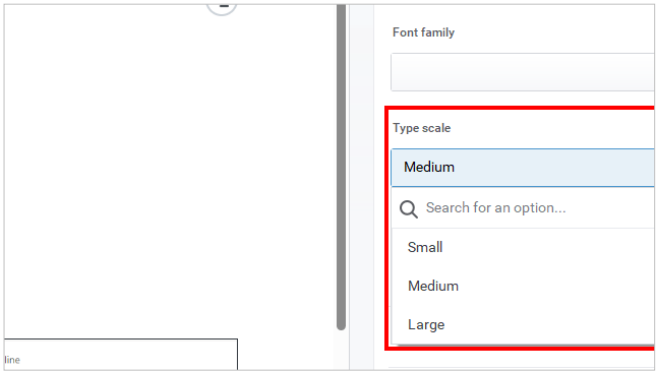
14.7.2.5.2.4. Base Typography

Font family: You can choose the fonts based on your requirements from the provided list.



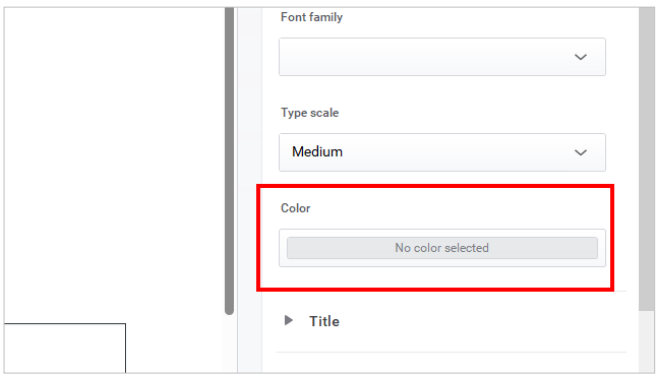
14.7.2.5.2.5. Type Scale

Type scale: You can set the font size from here as small, medium, or large.



14.7.2.5.2.6. Color

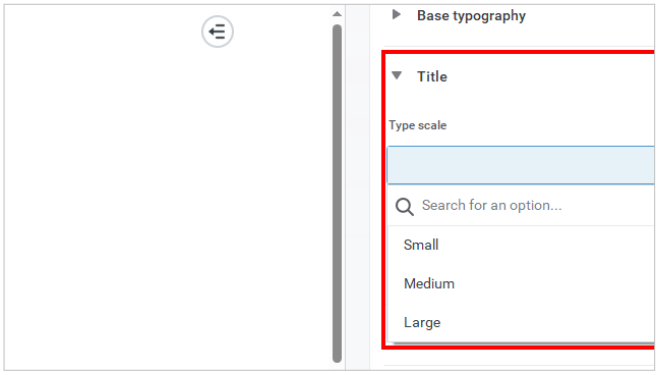
Color: You can change the title color from the available color dialog box.



14.7.2.5.2.7. Title

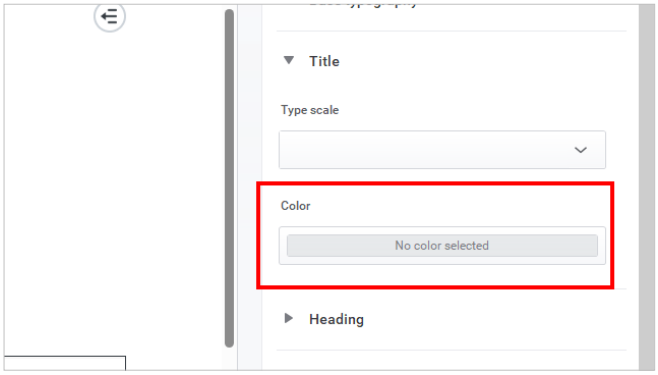
14.7.2.5.2.8. Type Scale

Type scale: You can set the font size of your title as small, medium, or large.



14.7.2.5.2.9. Color

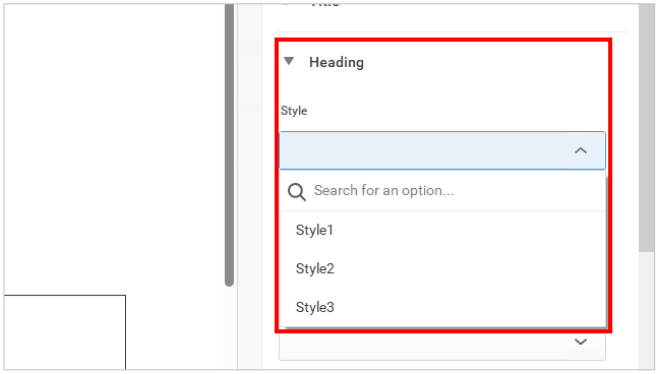
Color: You can set the title color from the available color dialog box.



14.7.2.5.2.10. Heading

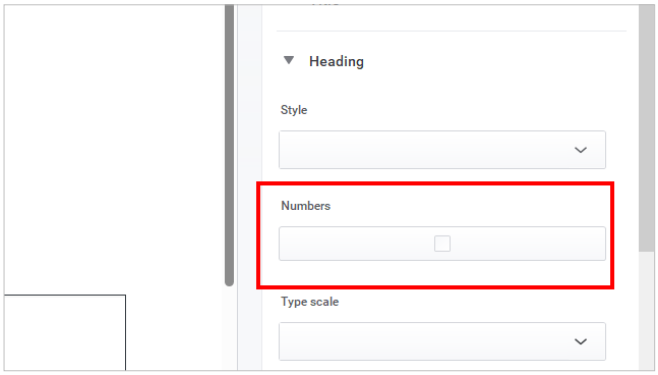
14.7.2.5.2.11. Style

Style: Based on your project requirements, you can choose the type of heading from the available options.



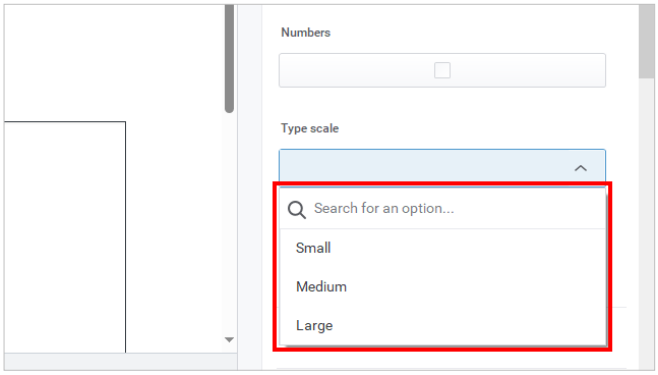
14.7.2.5.2.12. Numbers

Numbers: You can add numbers to your headings.



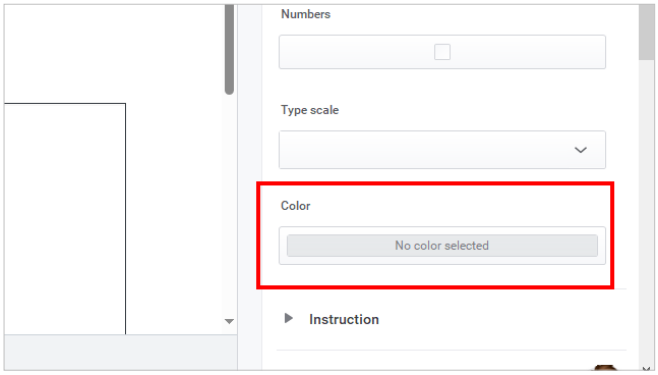
14.7.2.5.2.13. Type Scale

Type scale: You can set the font size of your heading as small, medium, or large.



14.7.2.5.2.14. Color

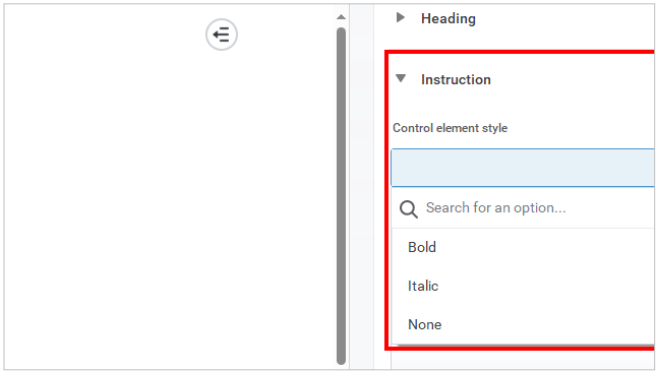
Color: You can set the heading color from the available color dialog box.



14.7.2.5.2.15. Instruction

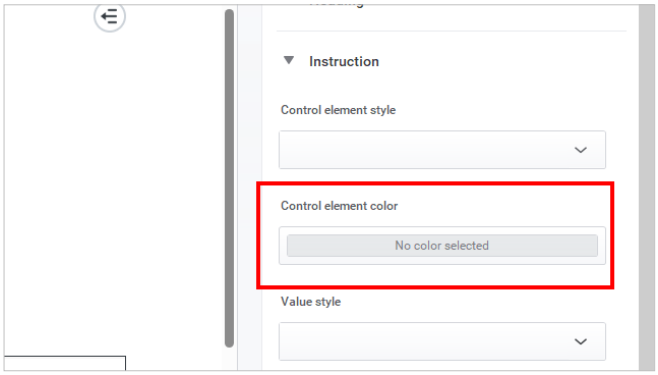
14.7.2.5.2.16. Control element style

Control element style: Based on your requirements, you can set the element style as bold, italic, or none.



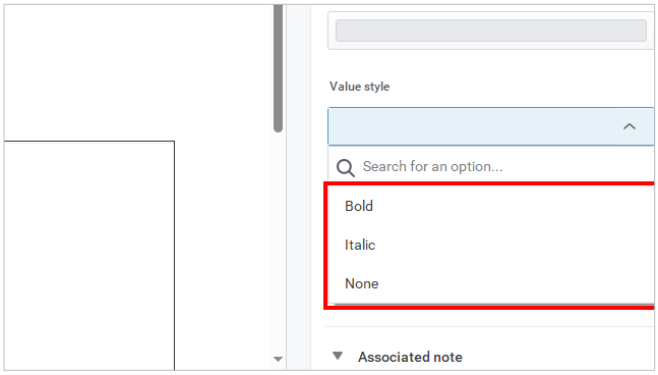
14.7.2.5.2.17. Control element color

Control element color: You can control the color from the color dialog box.



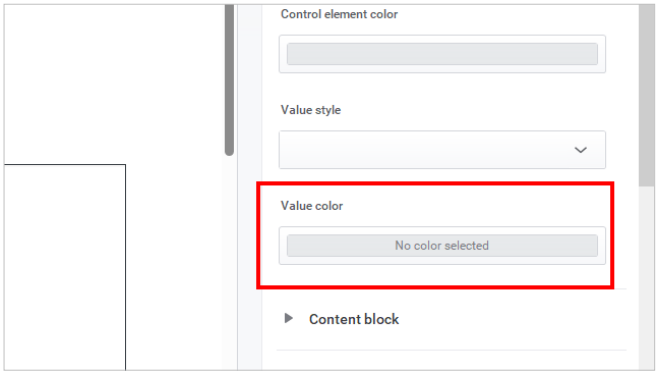
14.7.2.5.2.18. Value Style

Value style: You can set the value style as bold, italic, or none.



14.7.2.5.2.19. Value Color

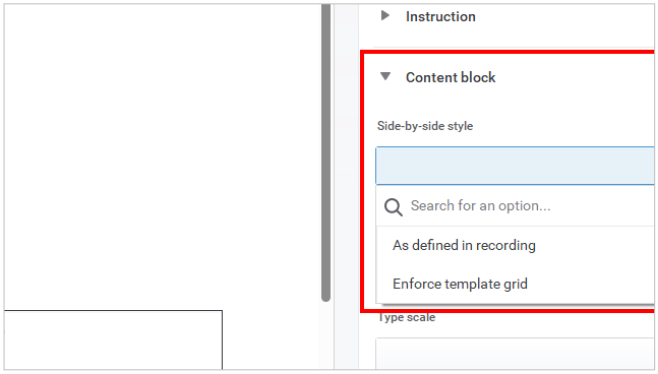
Value color: You can set the color according to your preferences.



14.7.2.5.2.20. Content Block

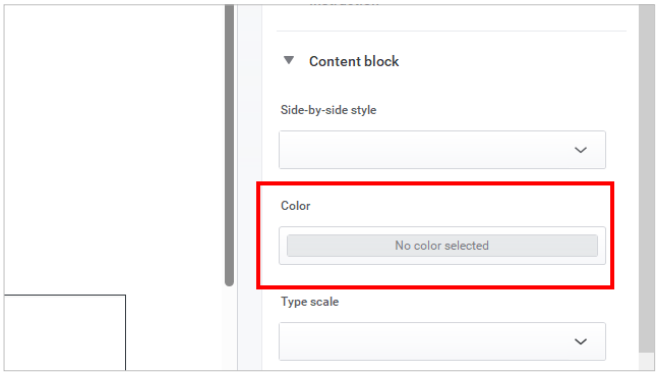
14.7.2.5.2.21. Side-by-side style

Side-by-side style: You can set the content block as defined in the recording or enforce the template grid.



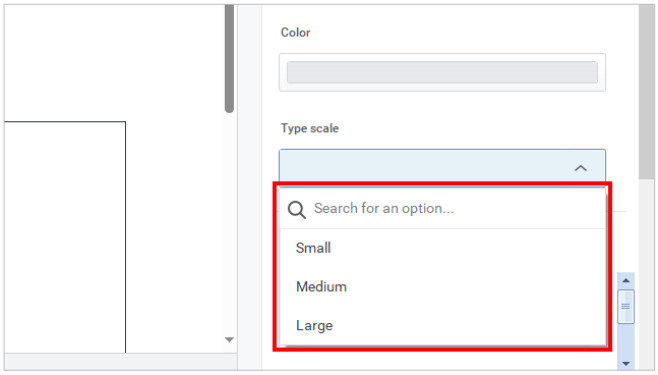
14.7.2.5.2.22. Color

Color: You can set the color from the available color dialog box.



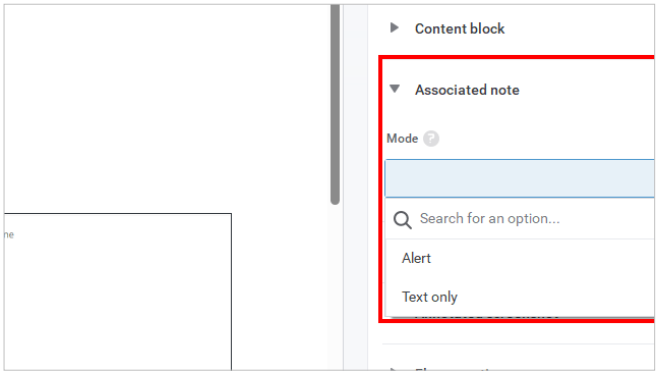
14.7.2.5.2.23. Type Scale

Type scale: You can set the size as small, medium, or large.

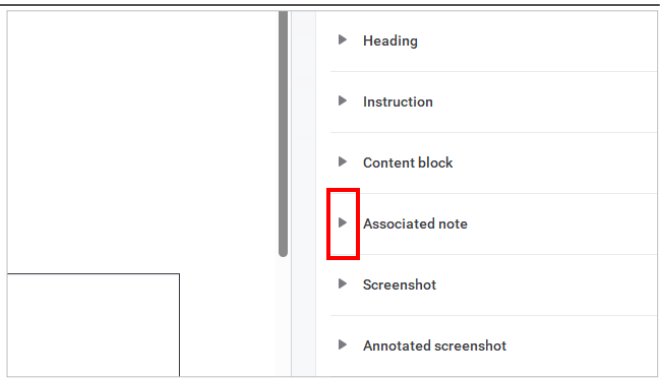


14.7.2.5.2.24. Associated Note

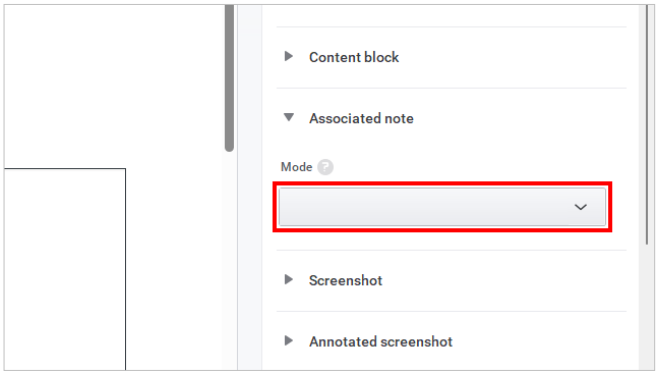
Mode: You have two options for styling associated notes: Alert or Text only.



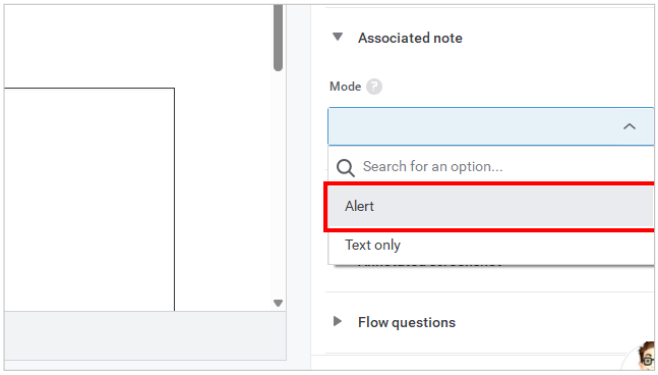
Click on the collapsible panel **Associated note** toggle button.



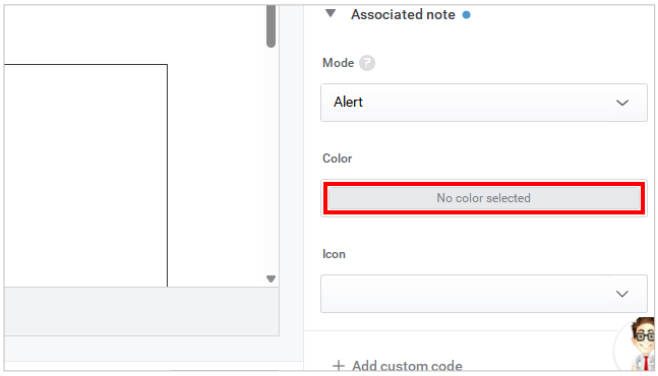
Click on the dropdown **recording-associated note mode**.



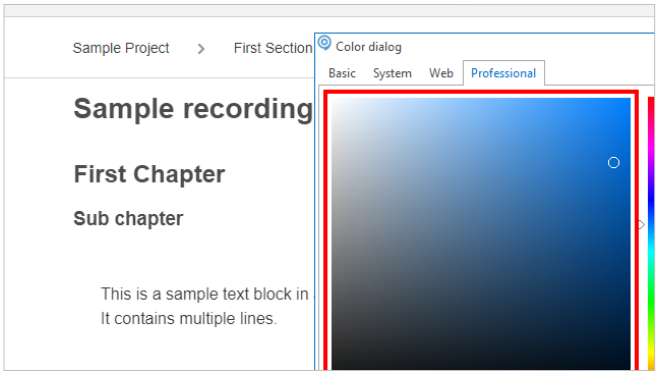
Click on the list view item **Alert**.



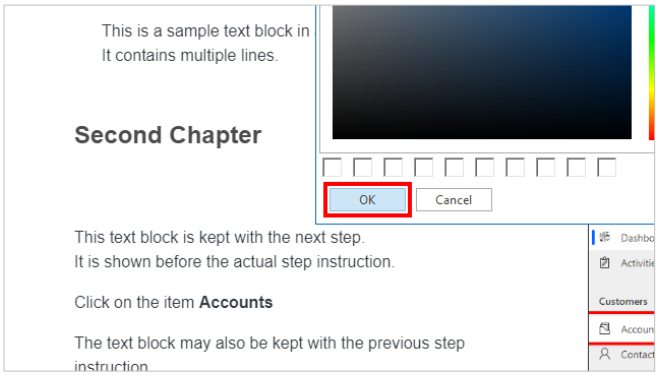
Click on the label **Color** to select the color you wish to assign to the note.



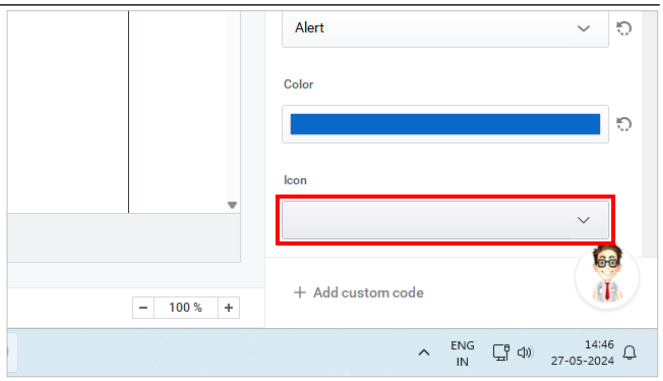
Click on the color picker.



Click on the button **OK**.

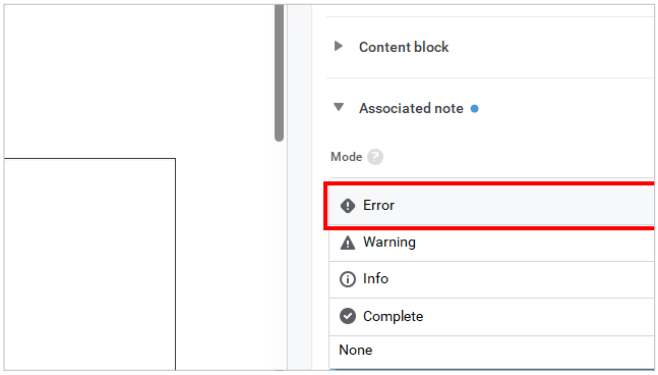


Click on the dropdown **Icon**.

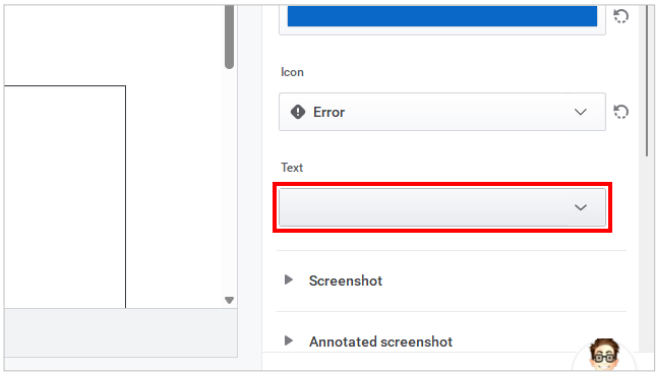


Select the icon from the dropdown options based on your project requirements.

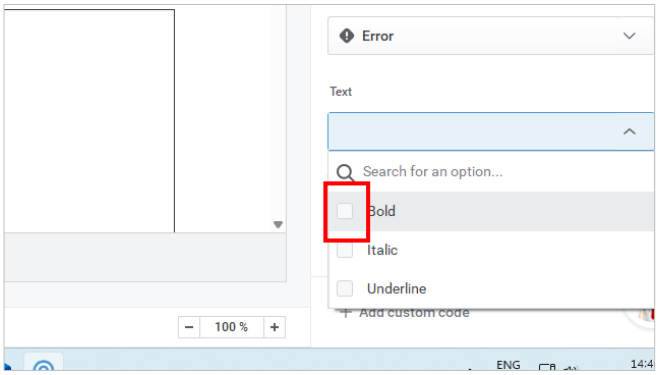
Click on the dropdown item **Error**.



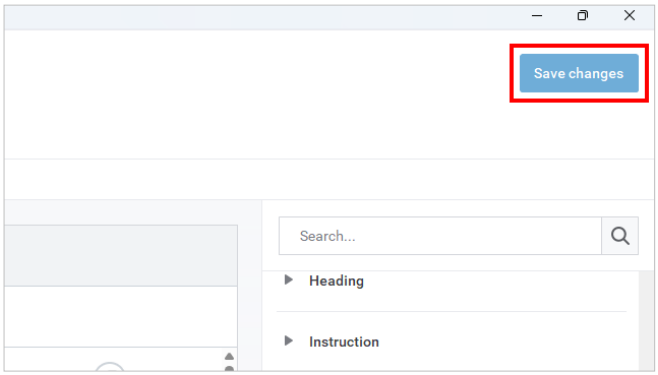
Click on the dropdown **recording text**.



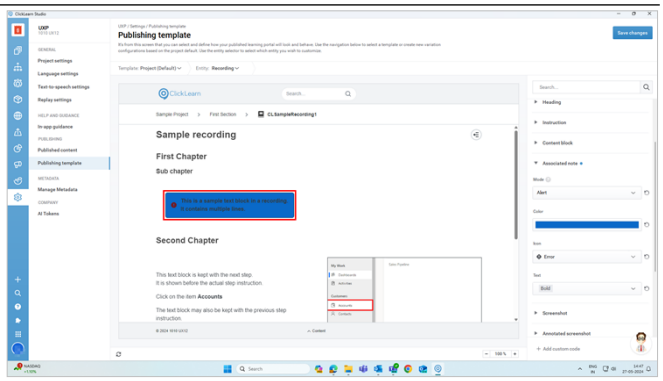
Click on the checkbox **Bold**.



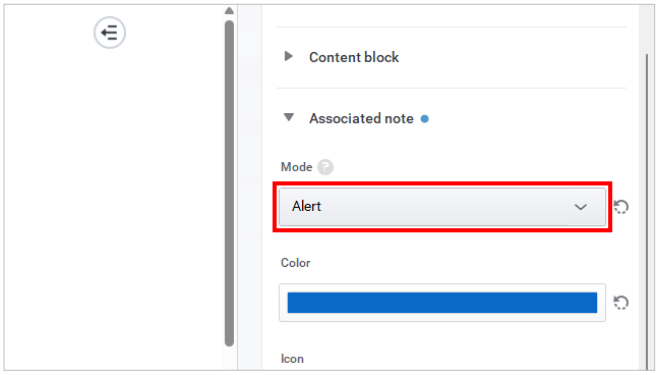
Click on the button **Save changes**.



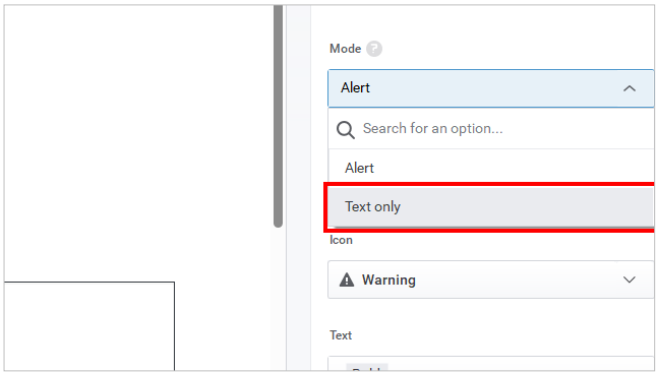
This is what the alert text looks like.



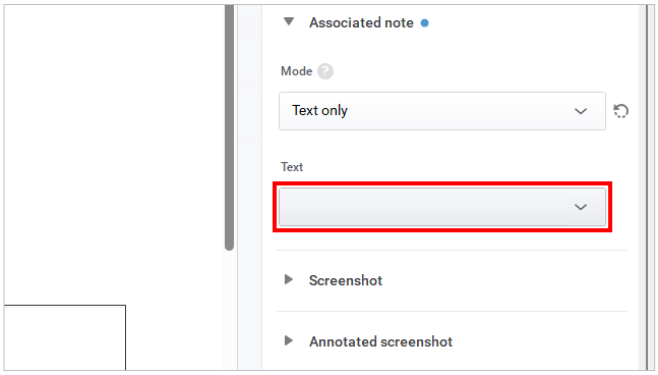
Click on the dropdown **recording-associated note mode**.



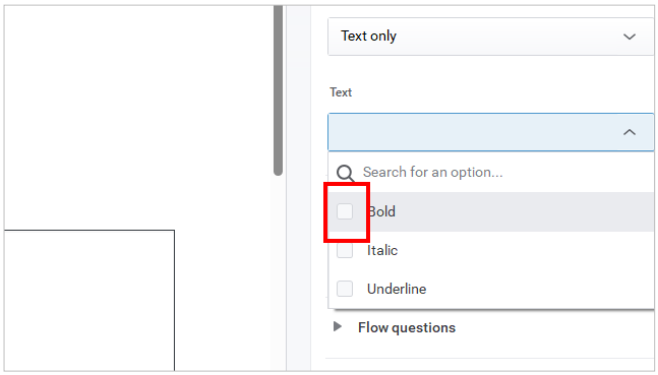
Click on the list view item **Text only**.



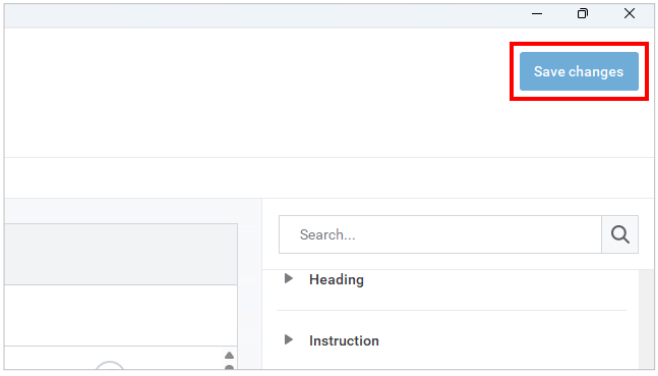
Click on the dropdown **recording text**.



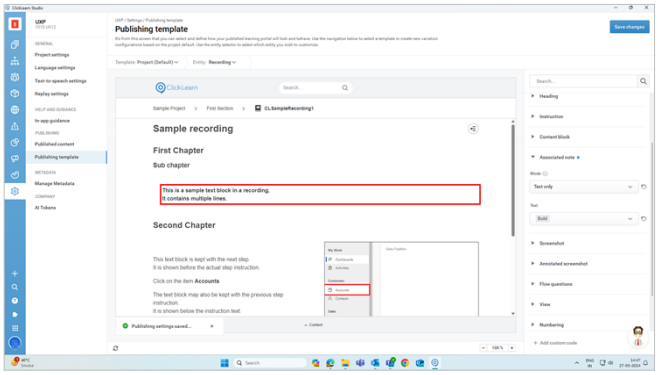
Click on the checkbox **Bold**.



Click on the button **Save changes**.



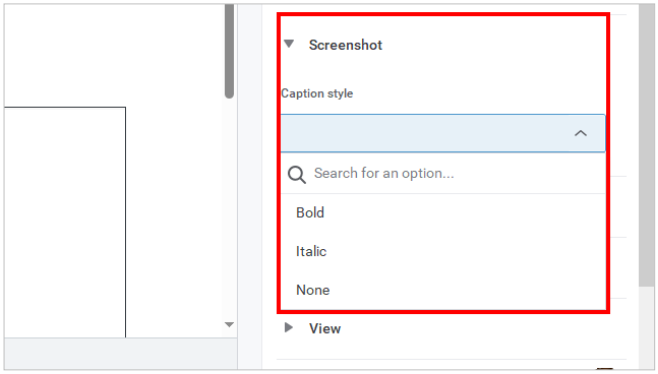
This is what the text-only mode looks like.



14.7.2.5.2.25. Screenshot

14.7.2.5.2.26. Caption Style

Caption style: You can select the caption style as bold, italic, or none.

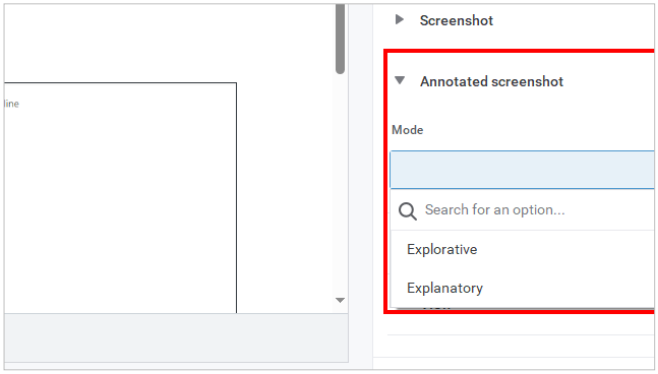


14.7.2.5.2.27. Annotated Screenshot

The **Mode** has two options.

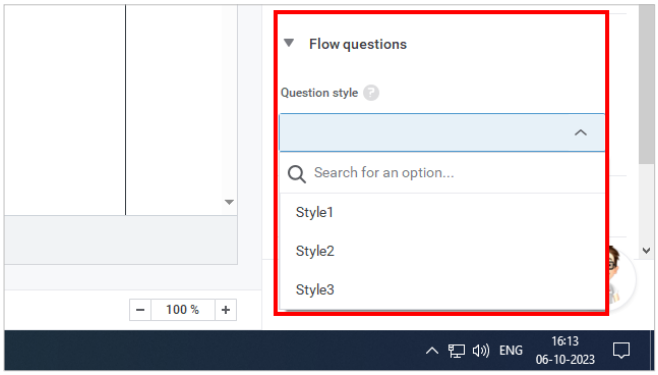
Explorative: This allows you to take a screenshot of a web page or a form and automatically generate annotations for all the fields or elements on that page.

Explanatory: They are similar to the explorative ones, but they also include a voice-over narration that explains the purpose and function of each annotation. You can customize the narration's voice, language, and speed and add text or audio.



14.7.2.5.2.28. Flow Questions

Flow questions: You can select the style of questions according to your project needs. The type you choose here will reflect in the video and virtual assistant.

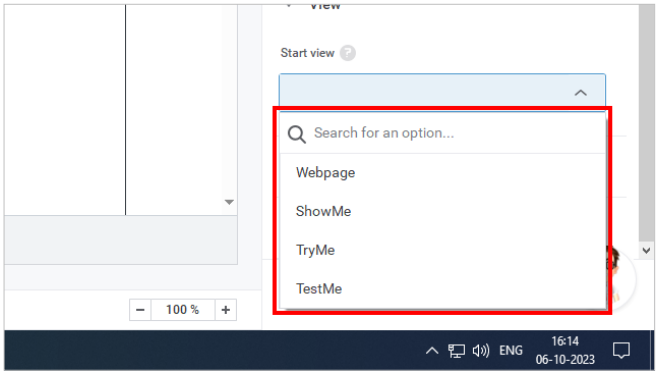


14.7.2.5.2.29. View

14.7.2.5.2.30. Start View

Start view: This allows you to choose the start view in the portal when the user reaches a recording. The options are:

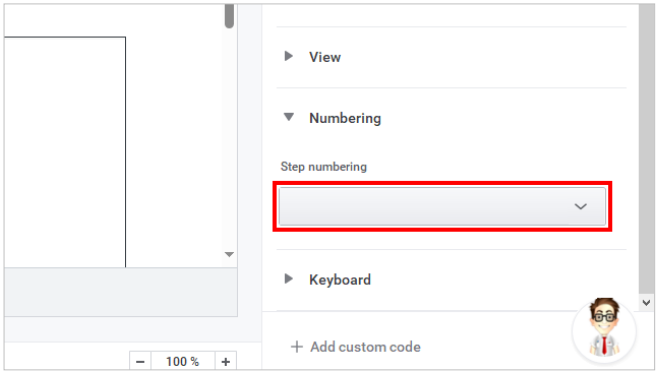
- Webpage
- ShowMe
- TryMe
- TestMe



14.7.2.5.2.31. Numbering

14.7.2.5.2.32. Step Numbering

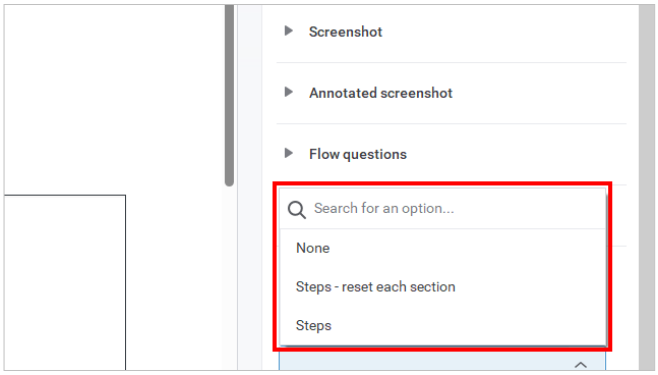
Step numbering: This allows you to number your steps in the recording. These are the following options.



None: No numbering for the steps in your recording.

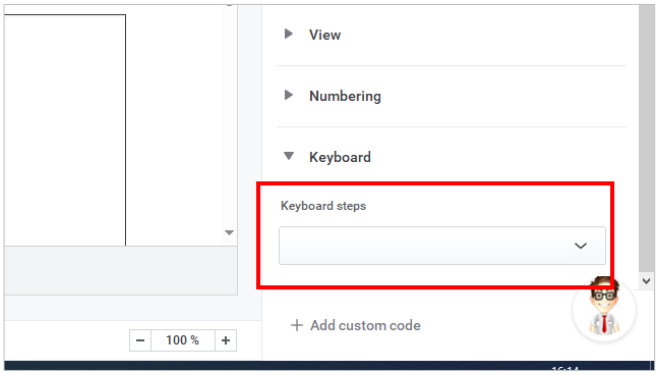
Steps - reset each section: This will number every step consecutively in every section.

Steps: This will number each step consecutively through the entire recording.



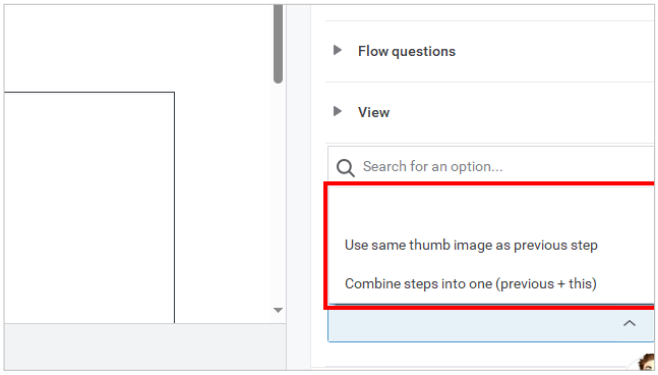
14.7.2.5.2.33. Keyboard

Click on the panel **Keyboard steps**. This provides you with two options, as listed below.



Use same thumb image as previous step: This setting uses the thumb image of the prior step.

Combine steps into one (previous + this): This setting combines steps into one keyboard step, the last step, and the current keyboard step.

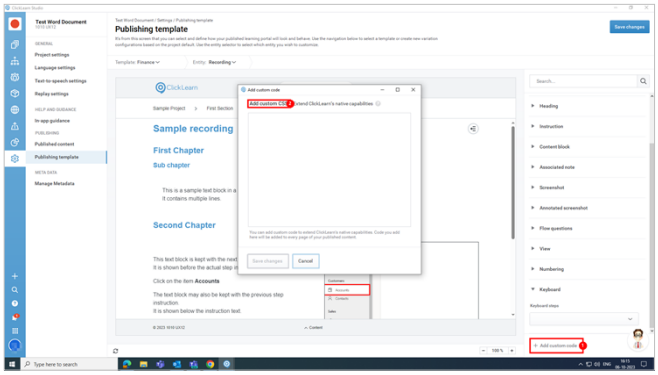


14.7.2.5.2.34. Add custom code

Custom code

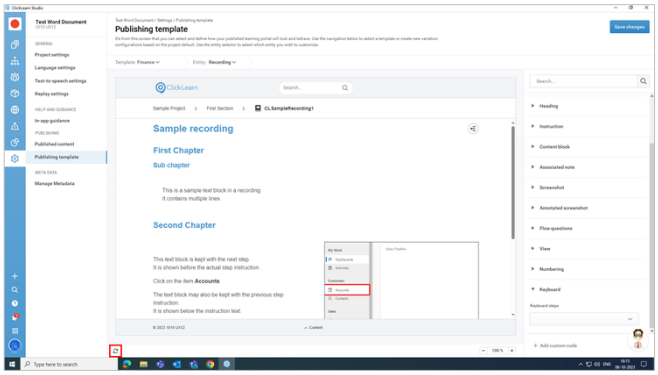
1. Click on the button **Add custom code**.
2. **Add custom code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



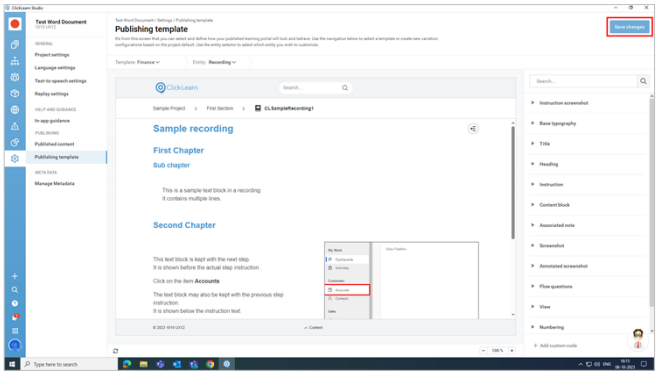
14.7.2.5.2.35. Refresh

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



14.7.2.5.2.36. Save Changes

Save changes: This will save all your changes in the entity recording.

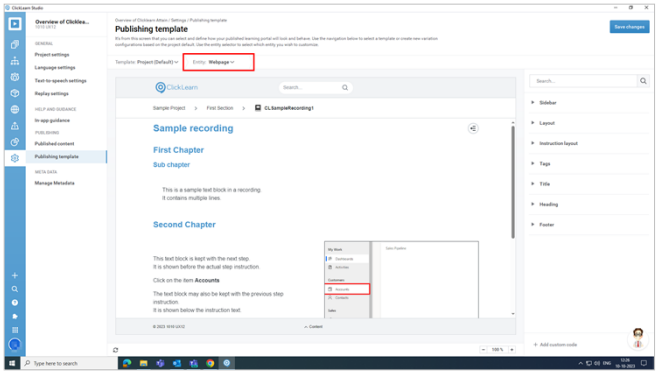


14.7.2.6. Entity Webpage

Shape how learners experience published webpages with flexible layouts, multi-format learning materials, tables of contents, metadata, keywords, and built-in feedback to improve content continuously.

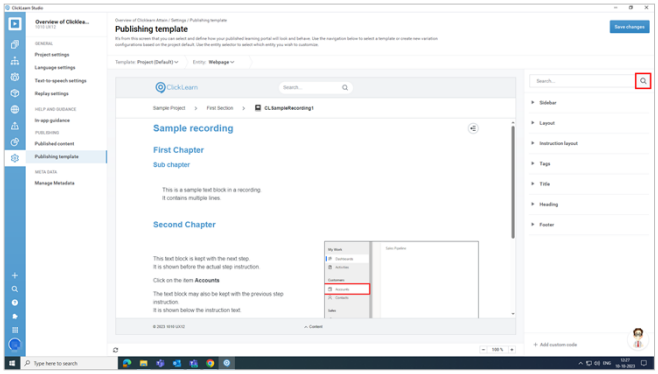
14.7.2.6.1. Webpage

Webpage: This screen displays what your webpage looks like.



14.7.2.6.1.1. Search

Search: This allows you to search any properties of the components associated with the webpage.



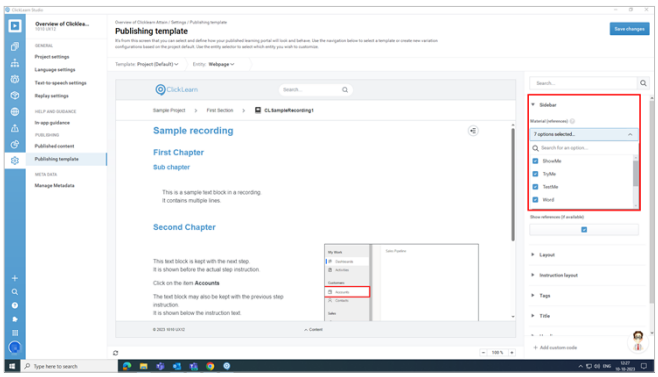
14.7.2.6.2. Other entities associated with the webpage

14.7.2.6.2.1. Sidebar

14.7.2.6.2.2. Material (references)

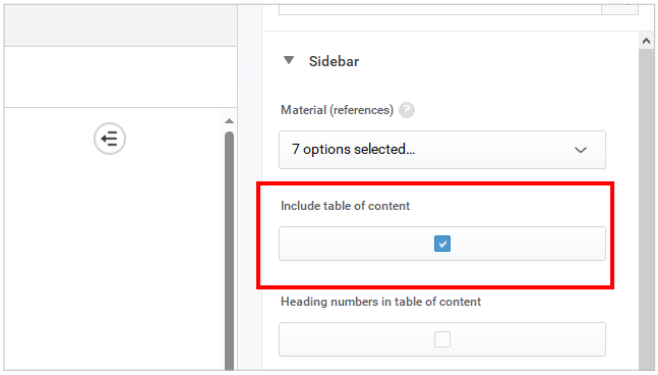
Material (references): The material you generate depends on how you choose this option. It offers you seven options, as listed below.

- Show Me
- Try Me
- Test Me
- Word
- PDF
- PowerPoint
- Assist



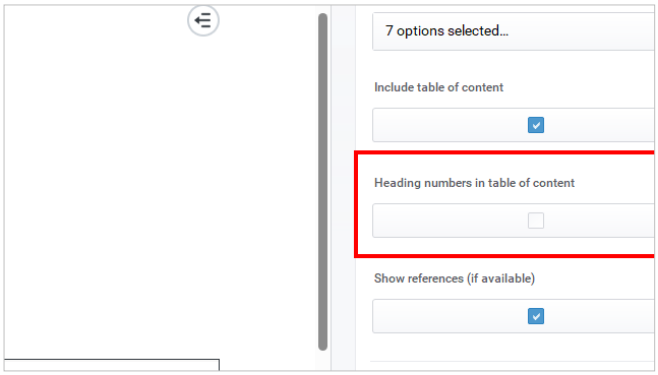
14.7.2.6.2.3. Include table of content

Include table of content: This will include the table displayed on the right side of your recording.



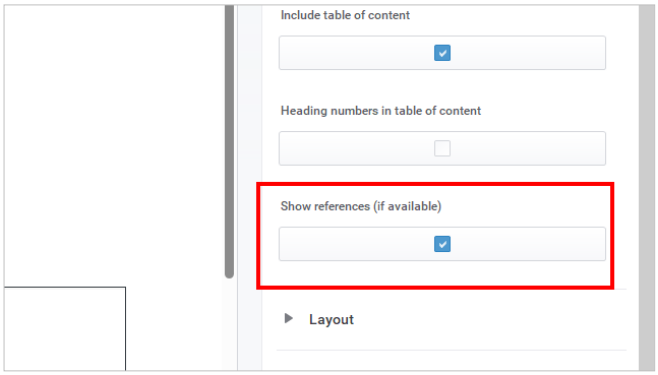
14.7.2.6.2.4. Heading numbers in table of content

Heading numbers in table of content: This option allows you to add numbers to your headings in your recordings.



14.7.2.6.2.5. Show references (if available)

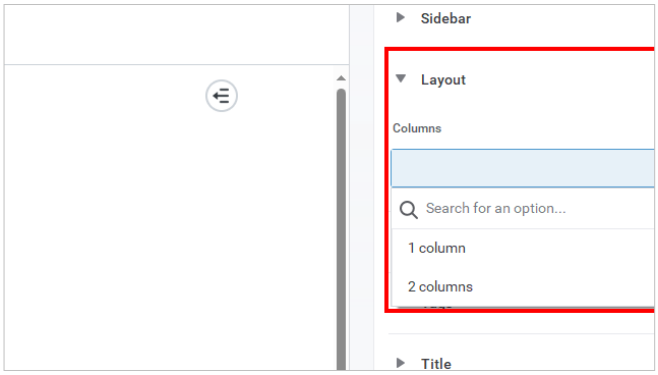
Show references (if available): Disabling this option will not display the references section on the right panel of the published content.



14.7.2.6.2.6. Layout

14.7.2.6.2.7. Columns

Columns: This will separate your recordings into 1 or 2 columns depending on your selected option.

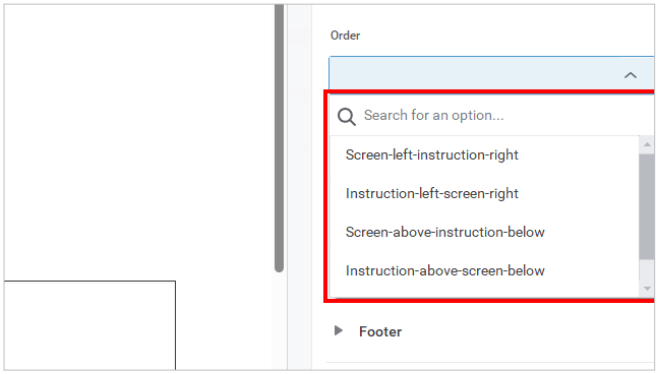


14.7.2.6.2.8. Instruction Layout

14.7.2.6.2.9. Order

Order: This option lets you customize how the recording looks. You can place the screenshot on the left and the instruction on the right, or vice-versa. You can choose the one from the following options that suit your project's needs.

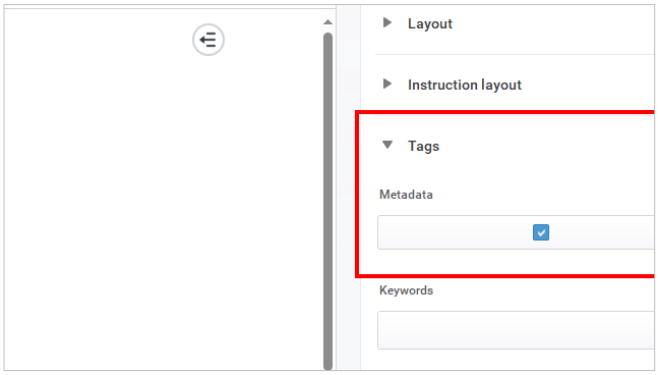
- Screen-left-instruction-right.
- Instruction-left-screen-right.
- Screen-above-instruction-below.
- Instruction-above-screen-below.
- Alternating.



14.7.2.6.2.10. **Tags**

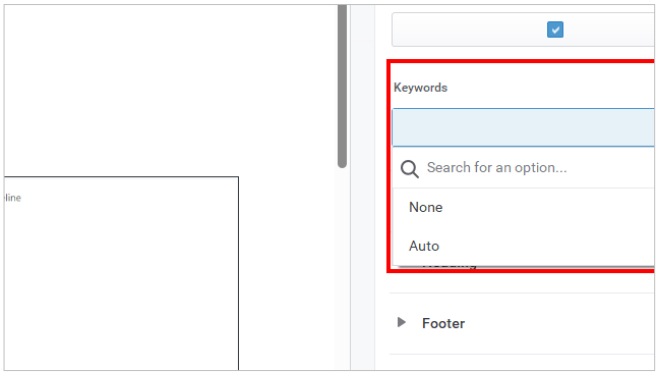
14.7.2.6.2.11. **Metadata**

Metadata: This will include metadata in your recording, which you can use to describe, identify, categorize, and manage your content.



14.7.2.6.2.12. **Keywords**

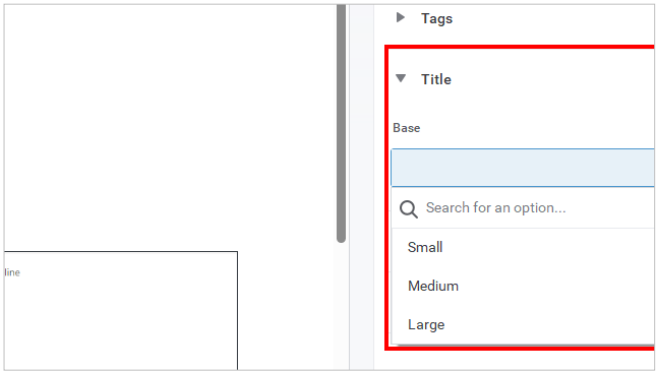
Keywords: You can customize your project by adding keywords depending on your use case. You can choose none or auto.



14.7.2.6.2.13. **Title**

14.7.2.6.2.14. **Base**

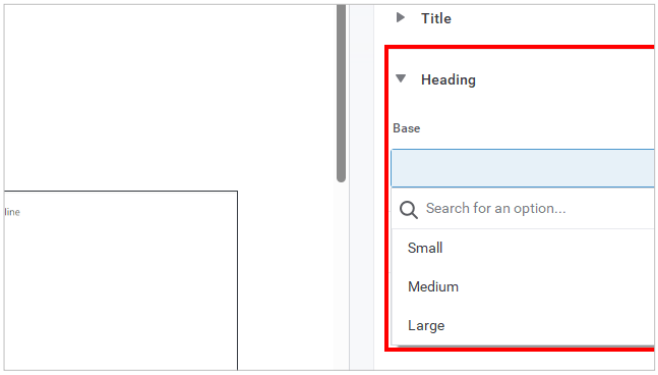
Base: You can set the title size as small, medium, or large.



14.7.2.6.2.15. **Heading**

14.7.2.6.2.16. **Base**

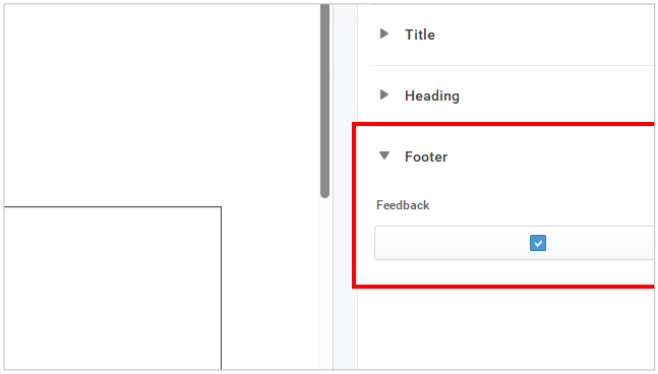
Base: You can set the heading size as small, medium, or large.



14.7.2.6.2.17. Footer

14.7.2.6.2.18. Feedback

Feedback: This option lets you add a feedback section at the bottom of the recording, where the end users can rate it.

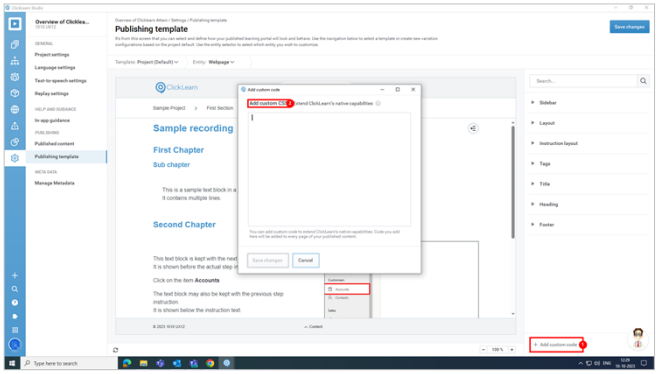


14.7.2.6.2.19. Add Custom Code

Custom code

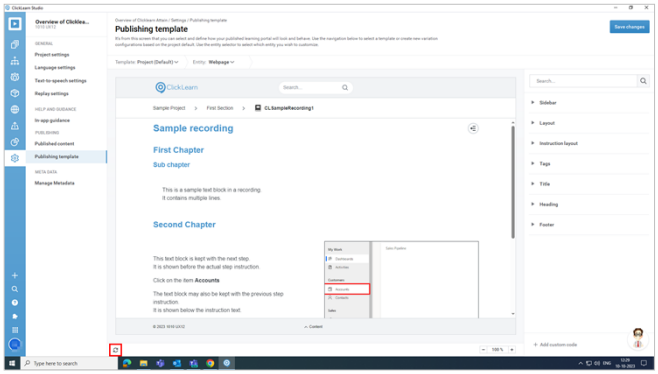
1. Click on the button **Add custom code**.
2. **Add custom code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



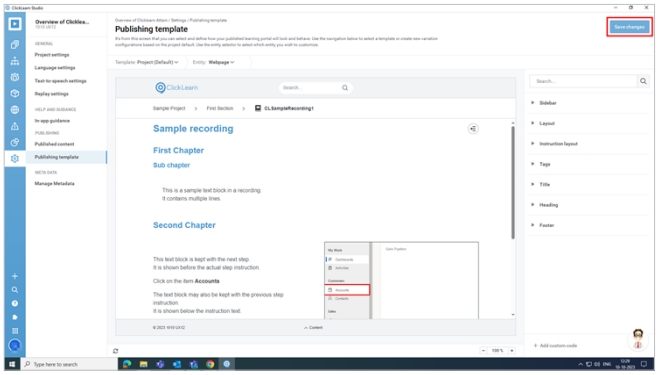
14.7.2.6.2.20. Refresh

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



14.7.2.6.2.21. Save Changes

Save changes: This will save all your changes on the entity webpage.

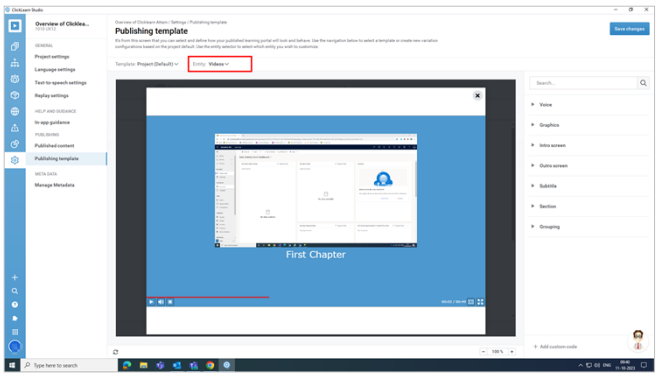


14.7.2.7. Entity Videos

Produce polished, on-brand training videos with custom skins, voices, cursors, intro and outro screens, subtitle styling, and built-in feedback that keeps learners engaged.

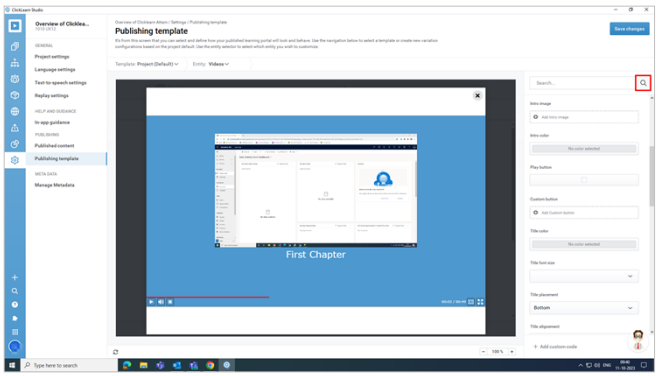
14.7.2.7.1. Videos

Videos: This screen displays what your video screen looks like.



14.7.2.7.1.1. Search

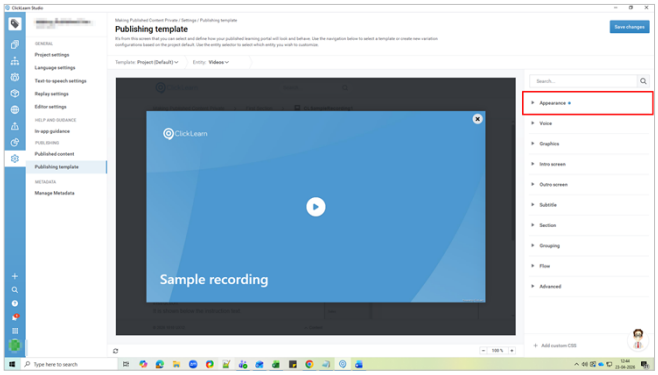
Search: This allows you to search any properties of the components associated with the video.



14.7.2.7.2. Other entities associated with the videos

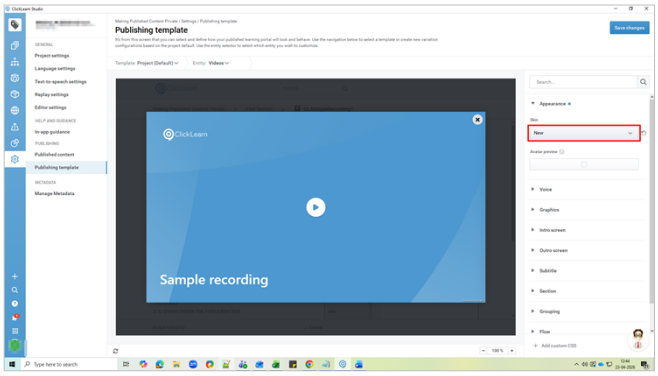
14.7.2.7.3. Appearance

Click on the collapsible panel **Appearance**

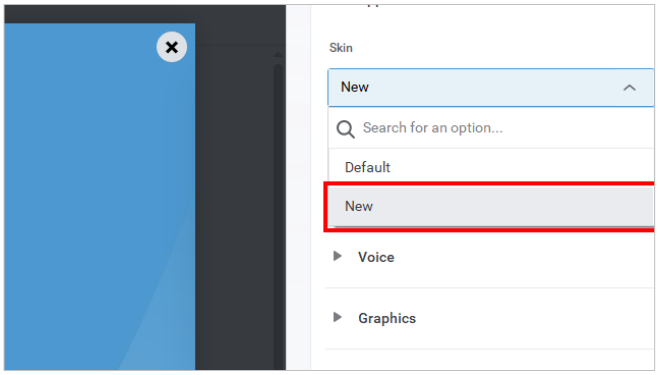


Click on the dropdown **videos-skin**

The new skin is applied by default. You can switch to the old skin anytime if you prefer.

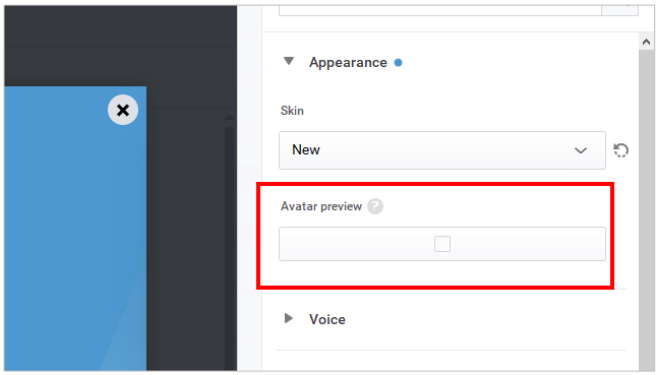


Click on the list view item **New**



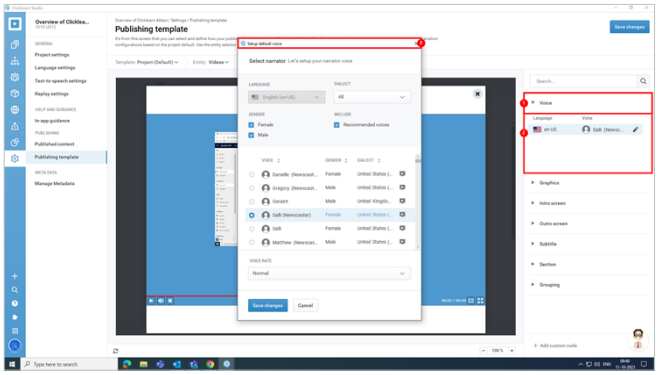
Click on the panel **Avatar preview**

Check this box to display the Avatar preview. Uncheck it to hide the preview.



14.7.2.7.3.1. Voice

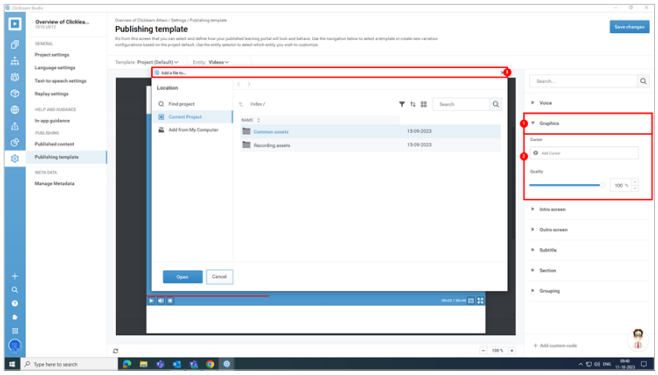
Voice



1. Click on the collapsible panel **Voice**.
2. **Voice:** You can set the voice for your video from the voice panel.
3. The pencil icon associated with the voice dialog allows you to choose and modify your voice according to your project requirements.
4. Please note that making this change will override the settings in project.

14.7.2.7.3.2. Graphics

Graphics

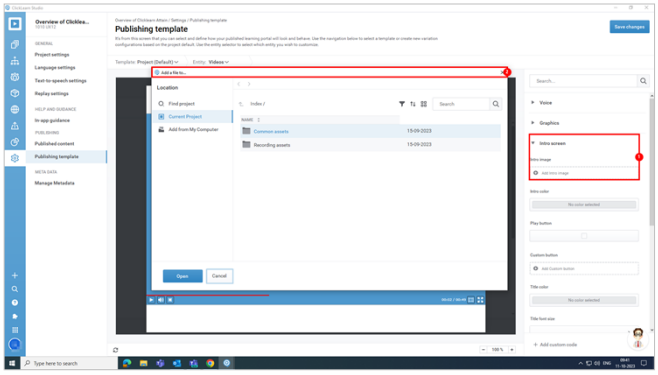


1. From here, you can assign a different cursor icon for your recordings and set the quality percentage of the cursor based on your project needs. Click on the collapsible panel **Graphics**.
2. Click on the file upload **Add cursor**.
3. This pops up with a new window; **add a file** where you can select the cursor icon from assets or your local system.

14.7.2.7.3.3. Intro screen

14.7.2.7.3.4. Intro Image

Intro image

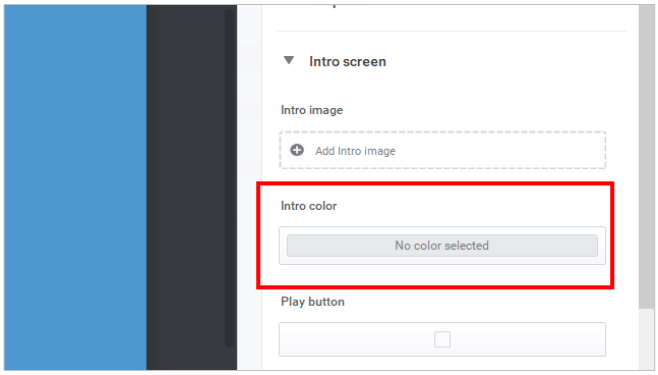


1. This is the first screen of your video that can display an image or a solid color. Click on the file upload **Add Intro image**.
2. This pops up with a new window: **Add a file** where you can select the intro image either from the assets or from your local system.

   For the intro screen and outro screens to be visible, you need to enable the Play button.

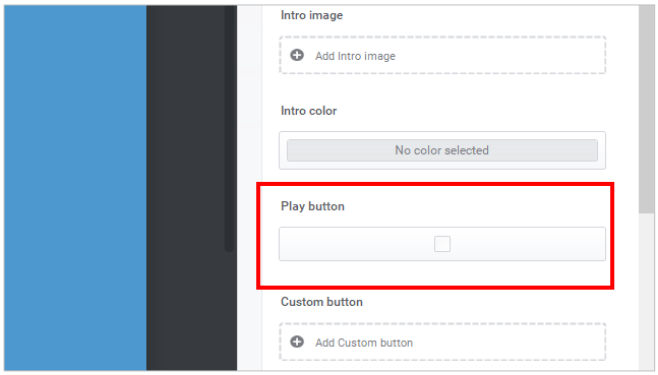
14.7.2.7.3.5. Intro Color

Intro color: This panel allows you to add or change the intro color for the intro screen. You can pick a color from the dialog box that pops up.



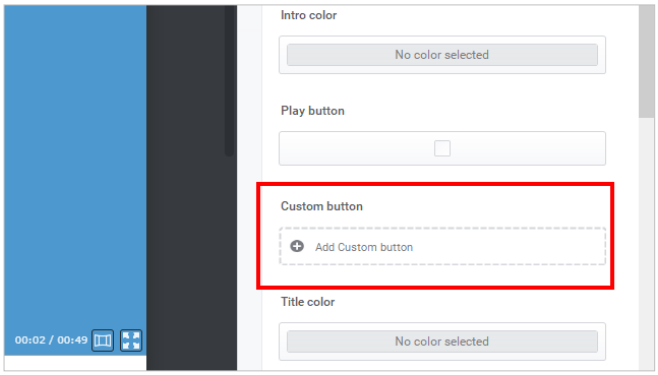
14.7.2.7.3.6. Play Button

Play button: This option allows you to add a play button to your videos.



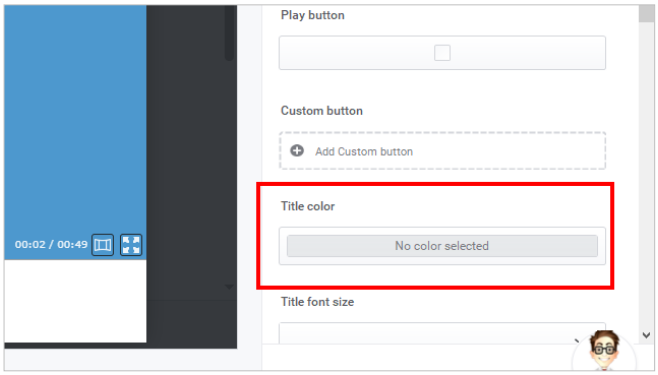
14.7.2.7.3.7. Custom Button

Custom button: Click on the add a custom button, and it pops up with a new dialog box; **add a file** where you can add a new button from the assets or the local system.



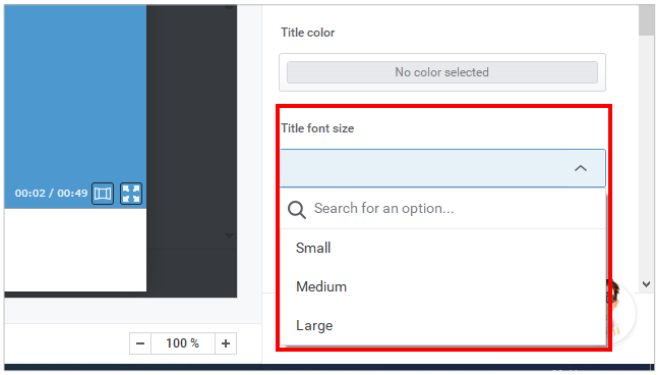
14.7.2.7.3.8. Title Color

Title color: You can customize the color based on your project requirements. It opens with a new color dialog box where you can choose the color according to your preference.



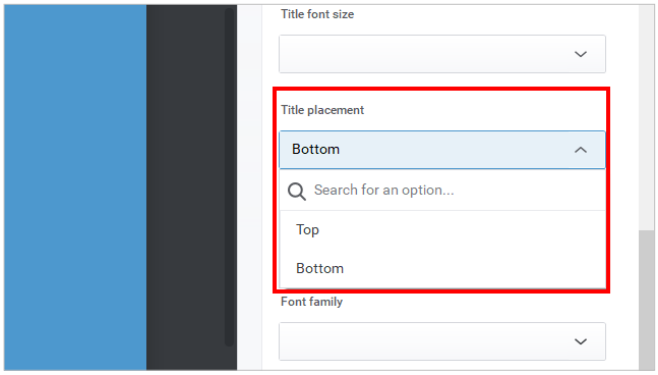
14.7.2.7.3.9. Title Font Size

Title font size: You can choose the font size as small, medium, or large.



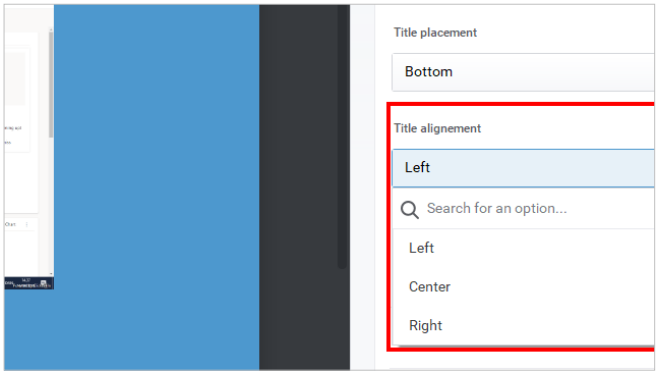
14.7.2.7.3.10. Title Placement

Title placement: This option allows you to change the order of your title. You can select the top or bottom according to your project needs.



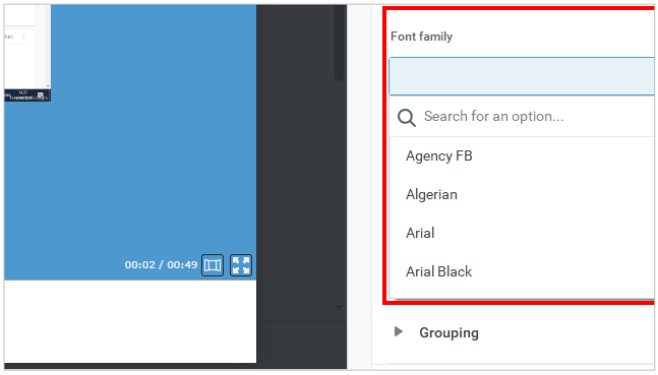
14.7.2.7.3.11. Title Alignment

Title alignment: You can choose how to position your title: left, center, or right.



14.7.2.7.3.12. Font Family

Font family: You can choose the fonts from the options available in the list.

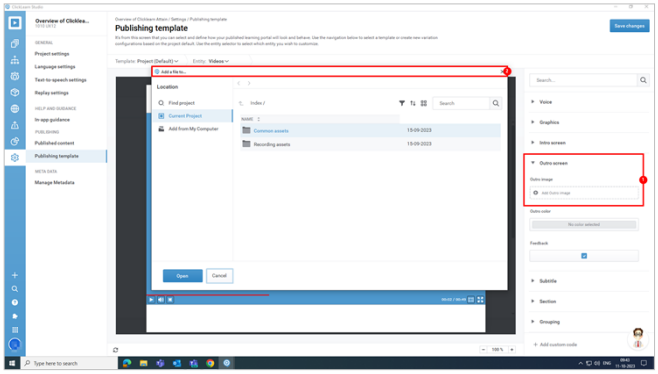


14.7.2.7.3.13. Outro Screen

14.7.2.7.3.14. Outro Image

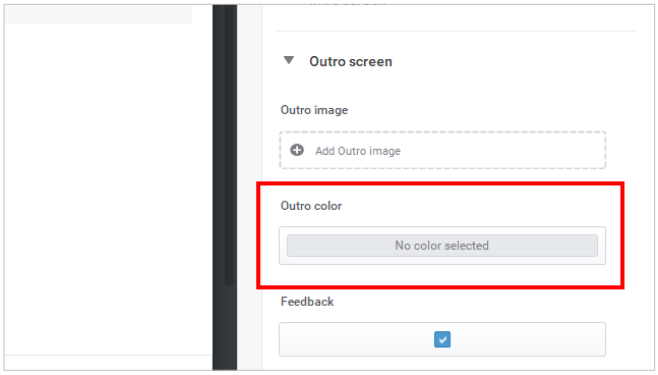
Outro image

1. This is the last screen of your video that can display an image or a solid color. Click on the file upload **Add Outro Image**.
2. This pops up with a new window: **Add a file** where you can select the outro image from the assets or your local system.



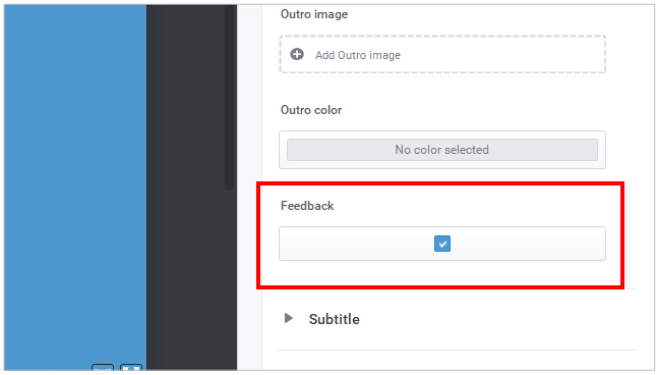
14.7.2.7.3.15. Outro Color

Outro color: This panel allows you to add or change the outro color for the screen. You can pick a color from the dialog box that pops up.



14.7.2.7.3.16. Feedback

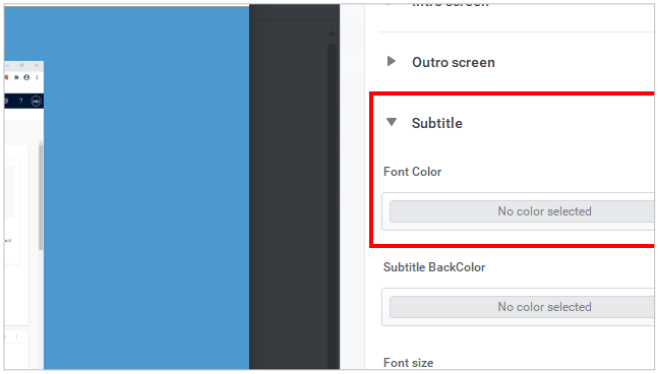
Feedback: This option lets you add a feedback section at the bottom of the recording, where the end users can rate it.



14.7.2.7.3.17. Subtitle

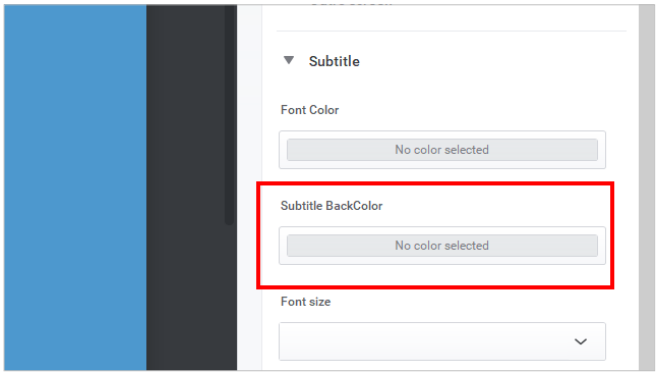
14.7.2.7.3.18. Font Color

Font Color: To change the color of the text, select a color from the dialog box.



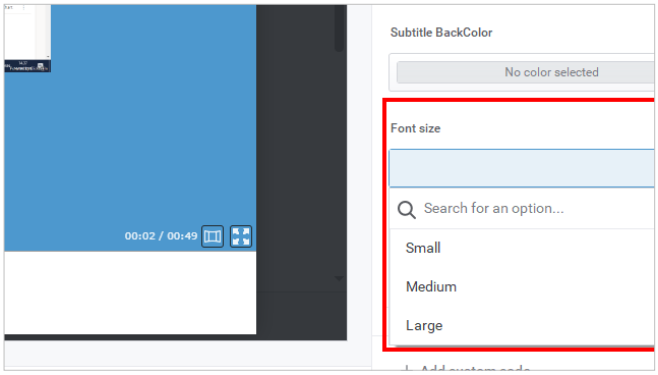
14.7.2.7.3.19. Subtitle BackColor

Subtitle BackColor: You can choose the background color of the subtitles in your videos.



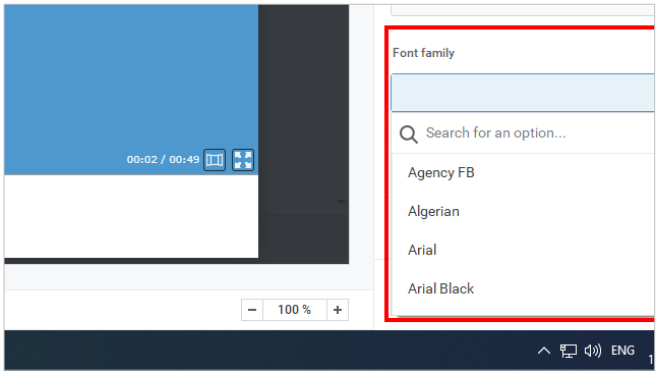
14.7.2.7.3.20. Font size

Font size: Based on project needs, you can set the font size as small, medium, or large.



14.7.2.7.3.21. Font Family

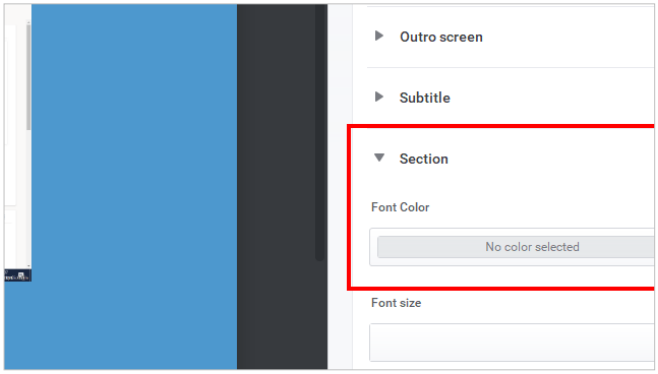
Font family: You can choose the fonts from the options available in the list.



14.7.2.7.3.22. Section

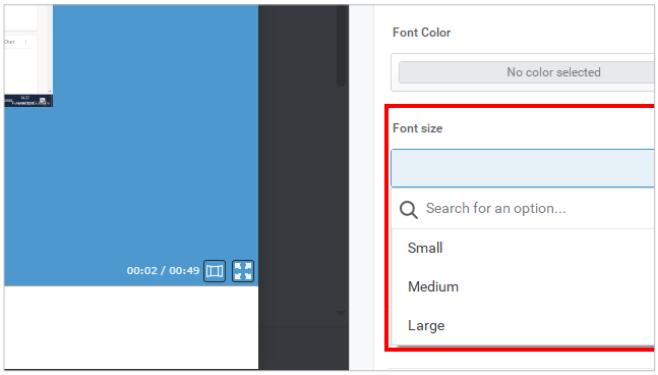
14.7.2.7.3.23. Font Color

Font Color: To change the color of the text, select a color from the dialog box.



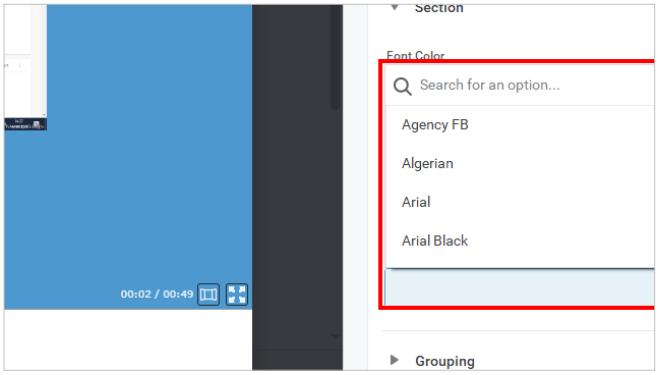
14.7.2.7.3.24. Font Size

Font size: Based on project needs, you can set the font size as small, medium, or large.



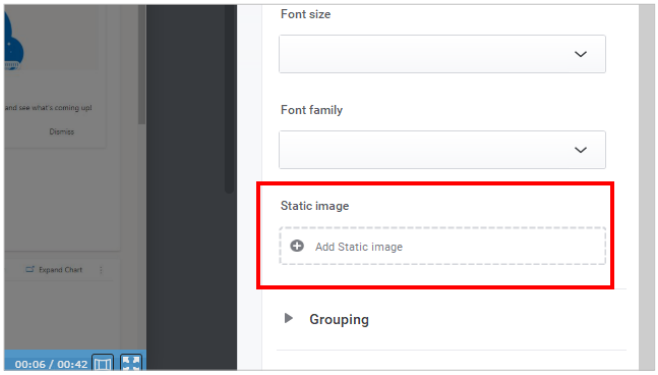
14.7.2.7.3.25. Font Family

Font family: You can choose the fonts from the options available in the list.



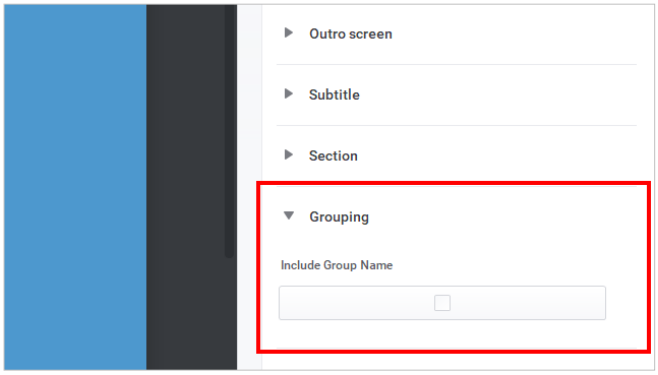
14.7.2.7.3.26. Static Image

Click on the panel **Static image**



14.7.2.7.3.27. Grouping

Include Group Name: This will display the group name in your recordings.

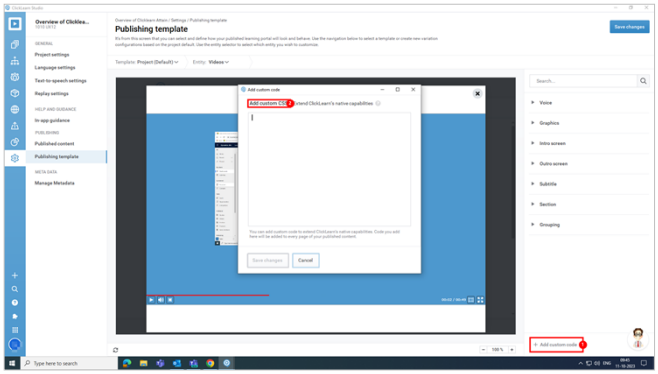


14.7.2.7.3.28. Add Custom Code

Custom code

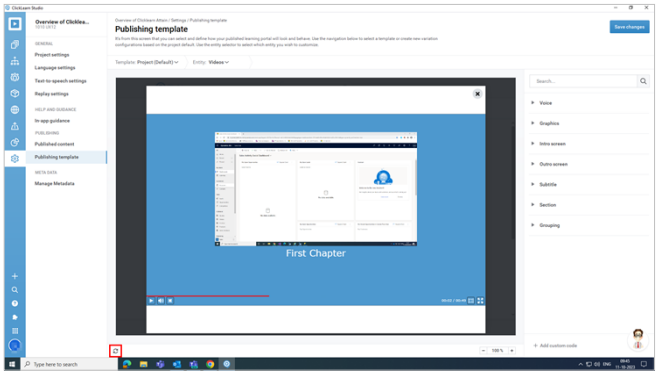
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



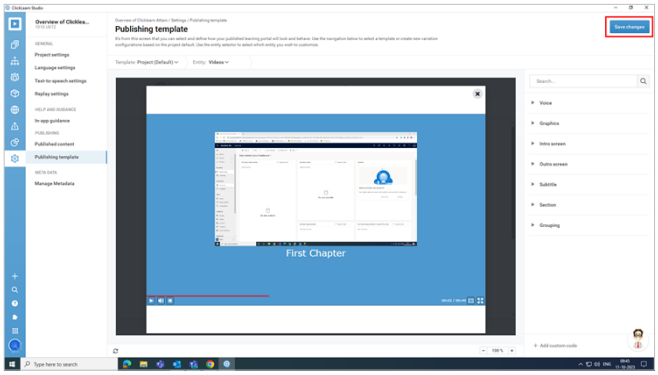
14.7.2.7.3.29. Refresh

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



14.7.2.7.3.30. Save Changes

Save changes: This will save all your changes on the entity videos.

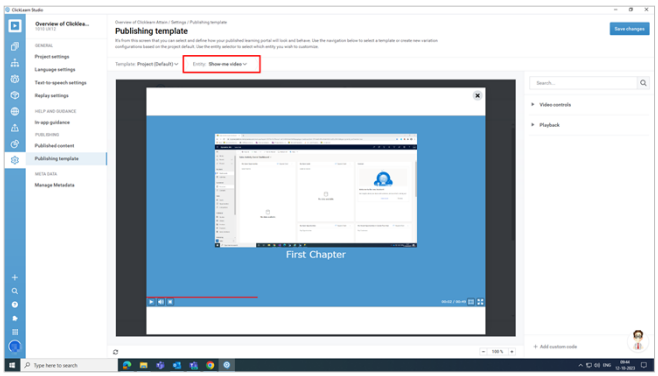


14.7.2.8. Entity Show Me Video

Deliver smooth, learner-paced Show Me videos with flexible controls, screen scaling, step transitions, timing, pauses, and highlight options that make every process easy to follow.

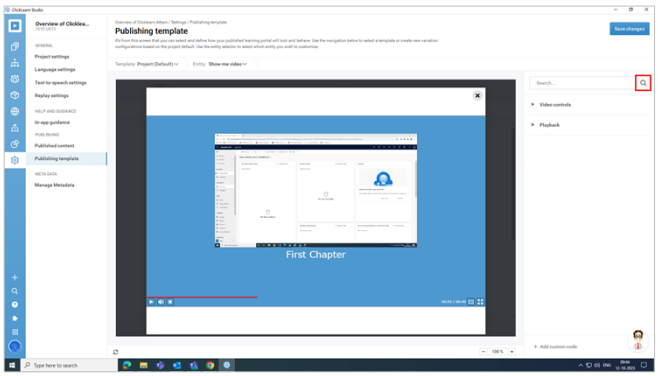
14.7.2.8.1. Show Me Video

Show-me video: This screen displays what Show Me Video looks like.



14.7.2.8.1.1. Search

Search: This allows you to search any properties of the components associated with the video.



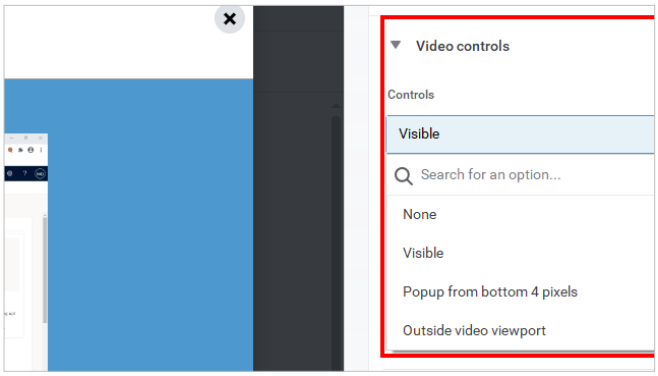
14.7.2.8.2. Other entities associated with the Show Me video

14.7.2.8.2.1. Video Controls

14.7.2.8.2.2. Controls

Controls: The video controls allow you to play, pause, adjust the volume, and forward your videos. These are the following options available under the control panel.

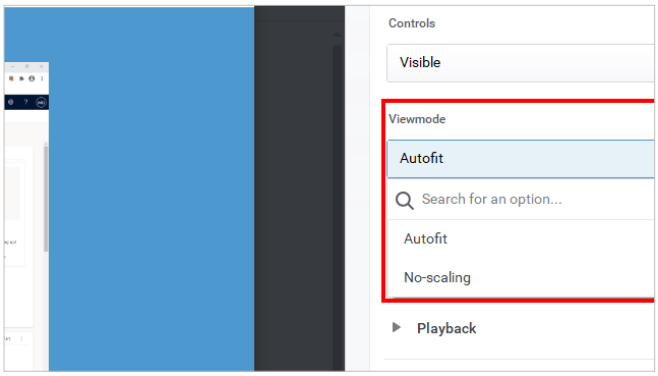
- None
- Visible
- Popup from bottom 4 pixels
- Outside video viewport



14.7.2.8.2.3. Viewmode

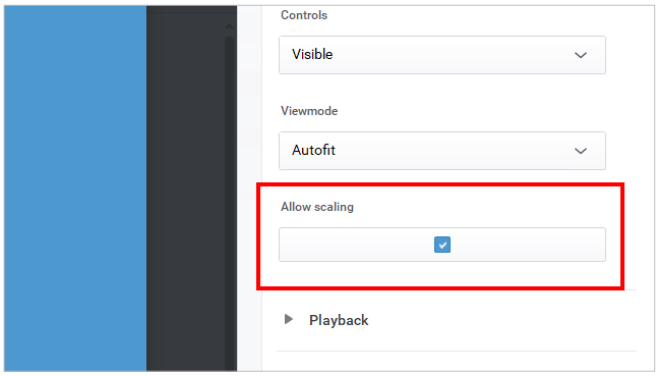
Viewmode: You can scale your recordings depending on the available screen space and keep the original recording. The viewmode offers you two options.

- Autofit
- No-scaling



14.7.2.8.2.4. Allow Scaling

Allow scaling: This property allows you to scale your recording to fit the user's screen size.

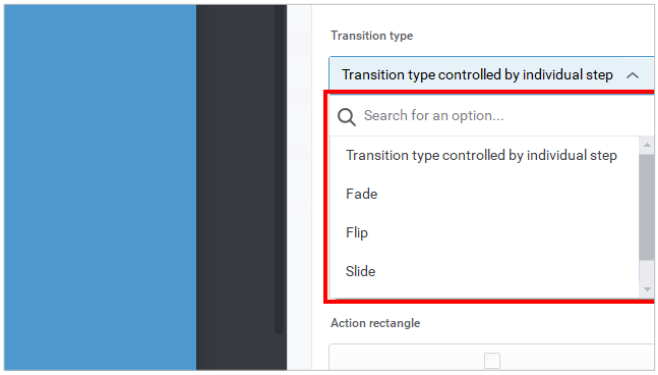


14.7.2.8.2.5. Playback

14.7.2.8.2.6. Transition Type

Transition type: This option allows you to set the transition type for the steps in your recording. This offers you with five different options.

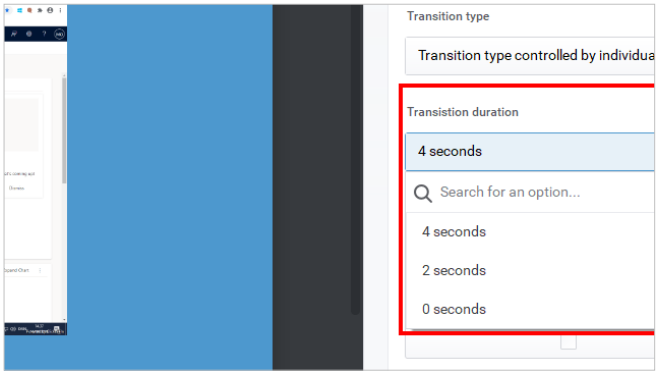
- Transition type controlled by individual step
- Fade
- Flip
- Slide
- None



14.7.2.8.2.7. Transition Duration

Transition duration: You can set the time limit for the transition. This offers three different options.

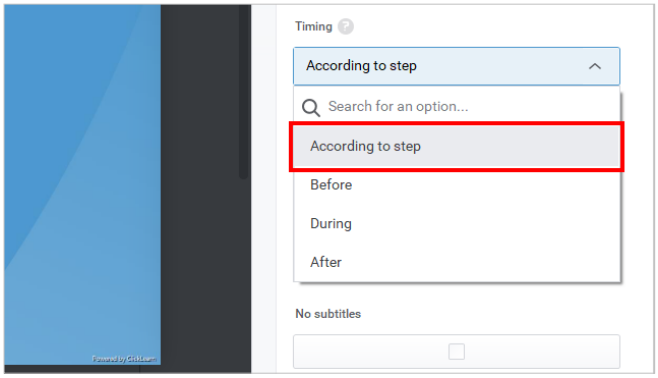
- 4 seconds
- 2 seconds
- 0 seconds
- 1 seconds



14.7.2.8.2.8. Timing

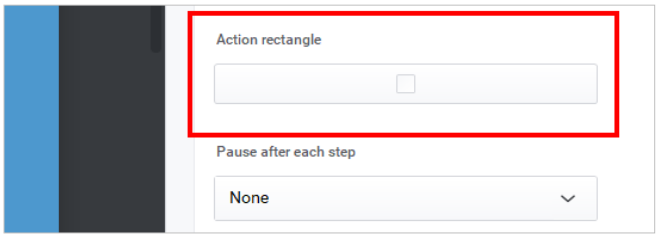
To set the timing, click on **Timing** in the list view. You'll then be prompted to choose from the following options:

- According to Step
- Before
- During
- After



14.7.2.8.2.9. Action Rectangle

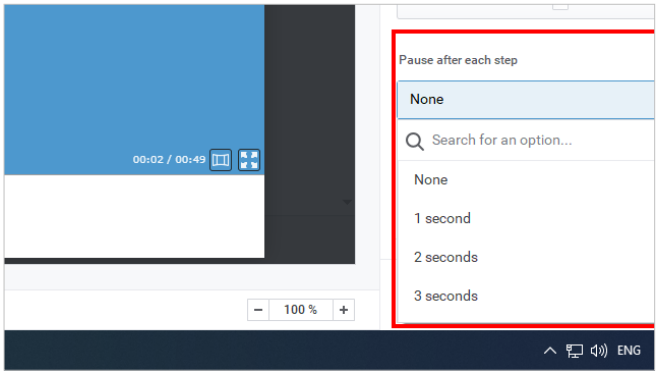
Action rectangle: Disabling this will not display the highlight hotspot on the steps.



14.7.2.8.2.10. Pause after each step

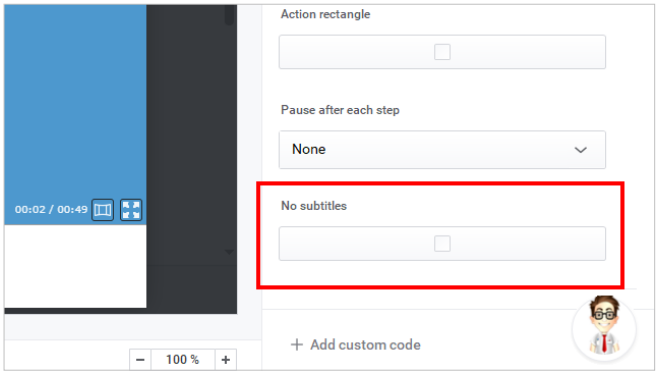
Pause after each step: You can select the pause duration after each step. This offers you with five different options.

- None
- 1 second
- 2 seconds
- 3 seconds
- 4 seconds



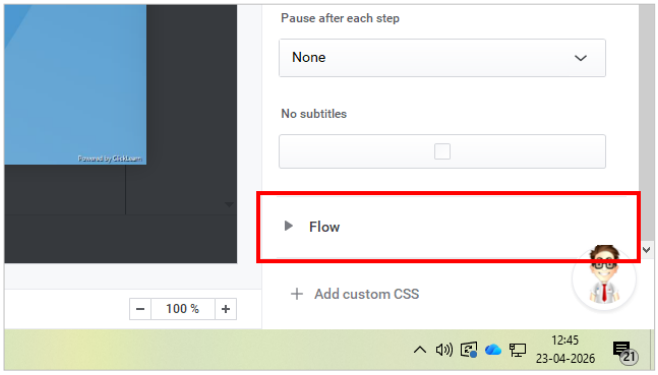
14.7.2.8.2.11. No Subtitles

No subtitles: This will not include the subtitles in your video.

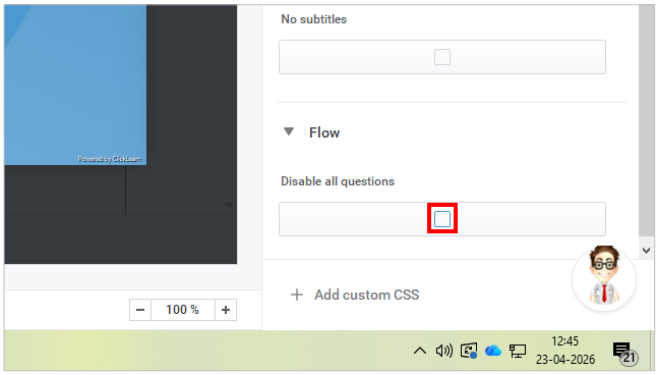


14.7.2.8.2.12. Flow

Click on the collapsible panel **Flow**



Click on the checkbox **Disable all questions**

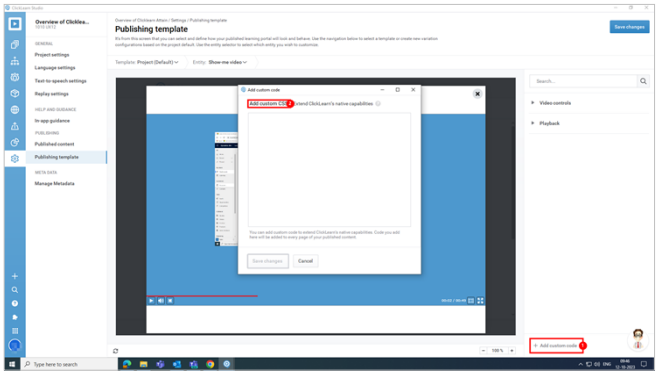


14.7.2.8.2.13. Add Custom Code

Custom code

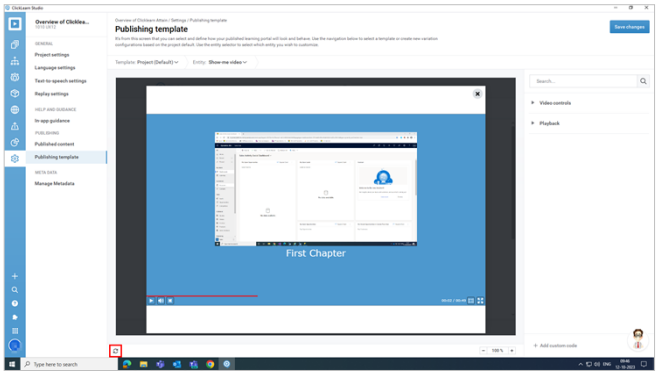
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



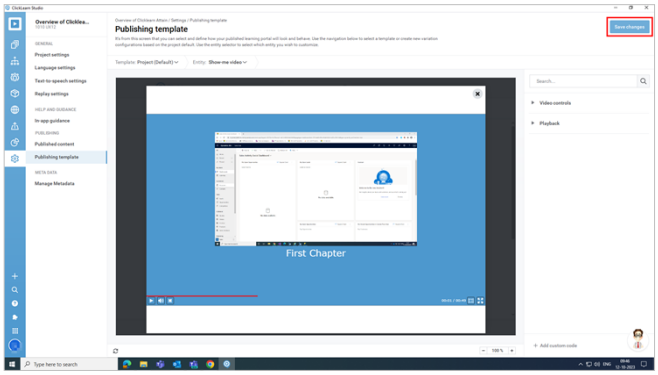
14.7.2.8.2.14. Refresh

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



14.7.2.8.2.15. Save Changes

Save changes: This will save all your changes on the entity show me video.

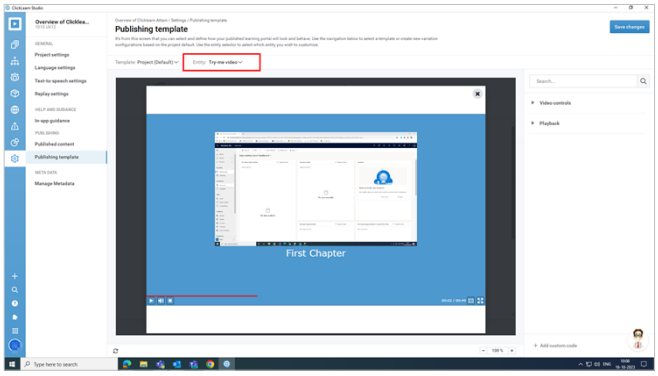


14.7.2.9. Entity Try Me Video

Build hands-on Try Me practice that adapts to every learner, with flexible controls, screen scaling, step transitions, fast mode, and subtitle options for confident skill-building.

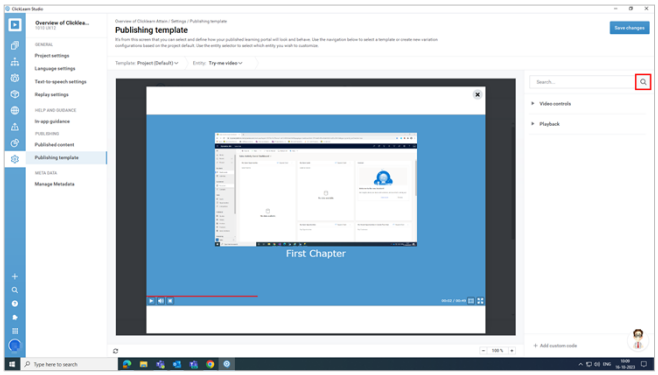
14.7.2.9.1. Try Me Video

Try-me video: This screen displays what Try Me Video looks like.



14.7.2.9.1.1. Search

Search: This allows you to search any properties of the components associated with the video.



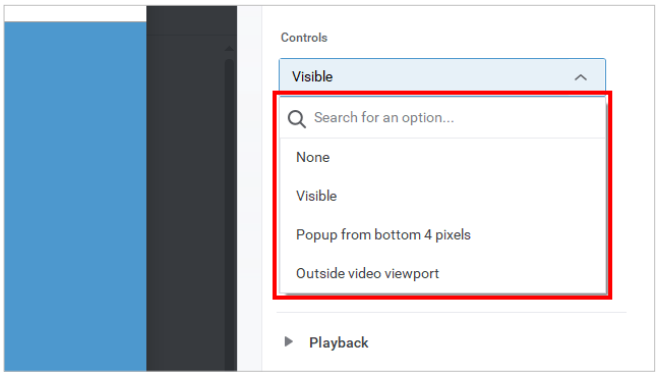
14.7.2.9.2. Other entities associated with the Try Me Video

14.7.2.9.2.1. Video Controls

14.7.2.9.2.2. Controls

Controls: The video controls allow you to play, pause, adjust the volume, and forward your videos. These are the following options available under the control panel.

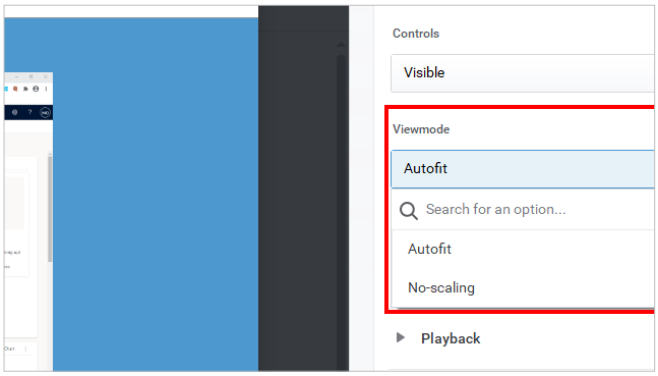
- None
- Visible
- Popup from bottom 4 pixels
- Outside video viewport



14.7.2.9.2.3. Viewmode

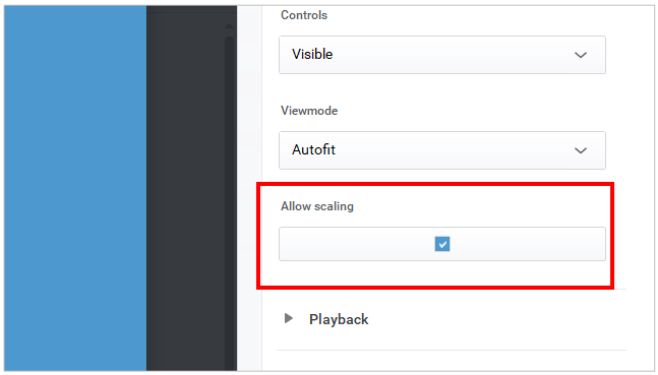
Viewmode: You can scale your recordings depending on the available screen space and keep the original recording. The viewmode offers you two options.

- Autofit
- No-scaling



14.7.2.9.2.4. Allow Scaling

Allow scaling: This property allows you to scale your recording to fit the user's screen size.

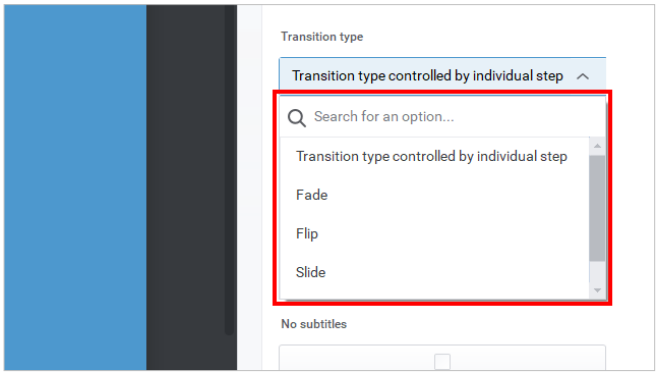


14.7.2.9.2.5. Playback

14.7.2.9.2.6. Transition Type

Transition type: This option allows you to set the transition type for the steps in your recording. This offers you with five different options.

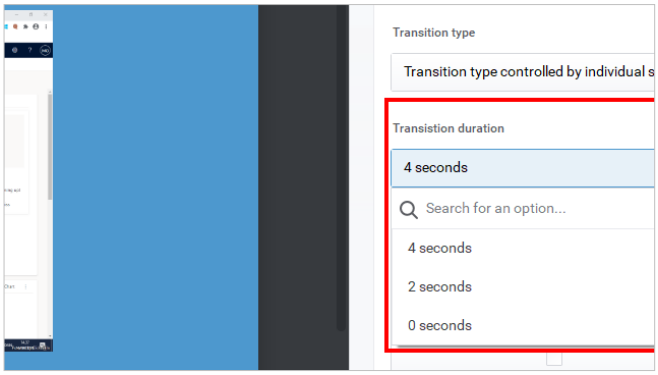
- Transition type controlled by individual step
- Fade
- Flip
- Slide
- None



14.7.2.9.2.7. Transition Duration

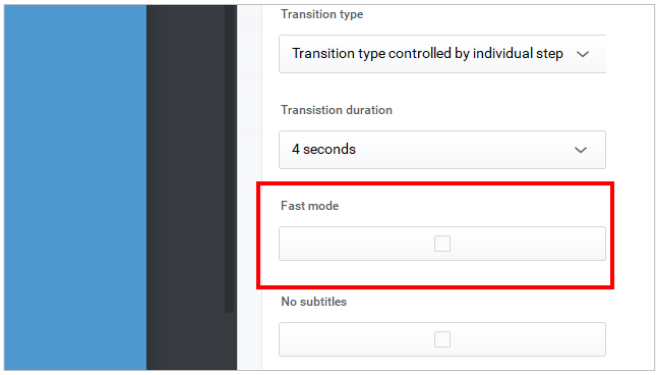
Transition duration: You can set the time limit for the transition. This offers three different options.

- 4 seconds
- 2 seconds
- 0 seconds



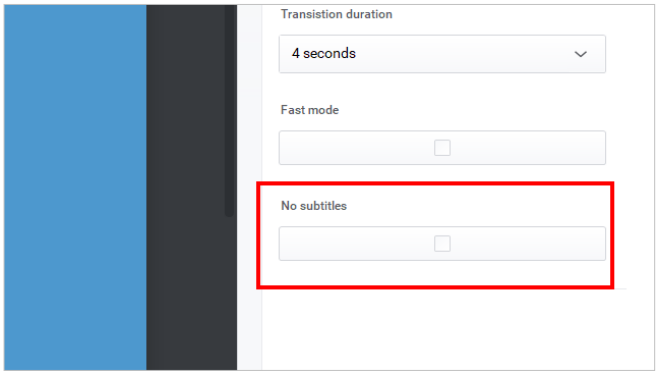
14.7.2.9.2.8. Fast Mode

Fast mode: You can make the audio and movements faster.



14.7.2.9.2.9. No Subtitles

No subtitles: This will not include subtitles in your video.

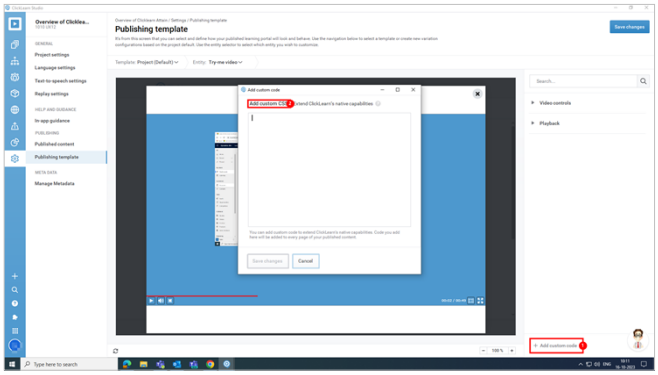


14.7.2.9.2.10. Add Custom Code

Custom code

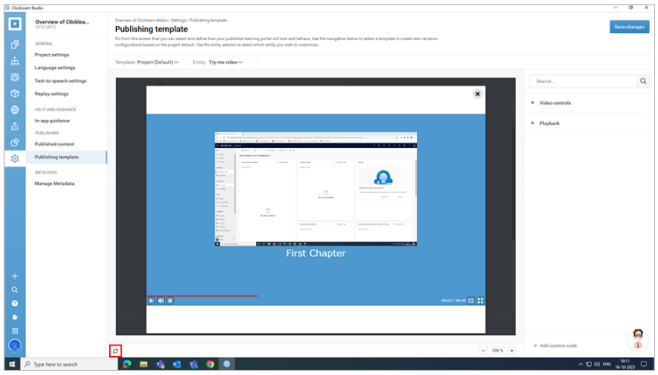
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your Custom CSS code to style the published content.



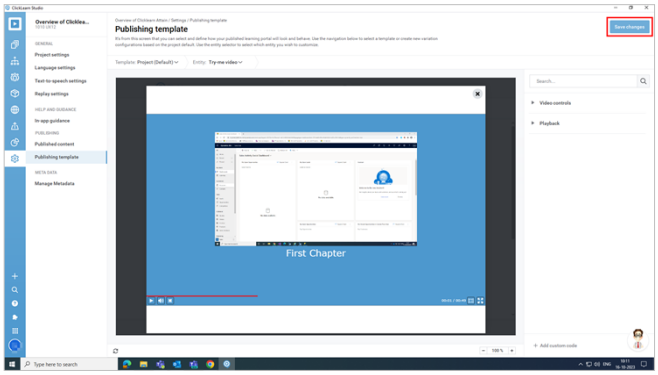
14.7.2.9.2.11. Refresh

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



14.7.2.9.2.12. Save Changes

Save changes: This will save all your changes on the entity try me video.

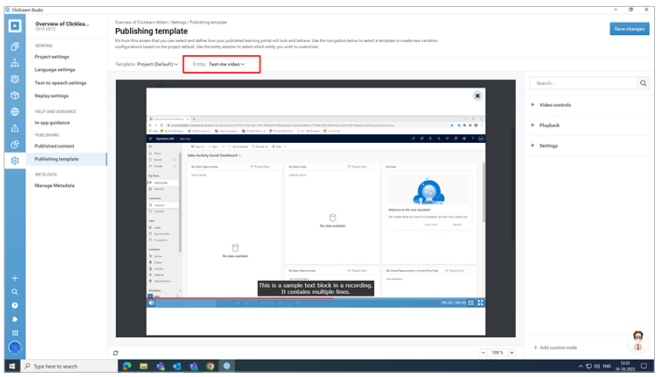


14.7.2.10. Entity Test Me Video

Measure learner proficiency with Test Me videos featuring configurable pass percentages, per-step scoring, flexible playback controls, and SCORM-ready assessments that validate real-world skills.

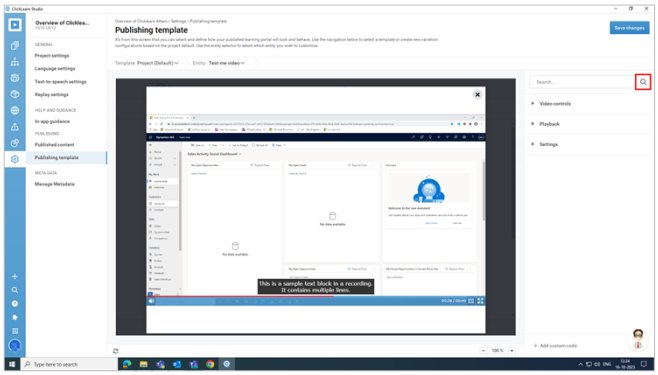
14.7.2.10.1. Test Me Video

Test-me Video: This screen displays what the Test Me video looks like.



14.7.2.10.1.1. Search

Search: This allows you to search any properties of the components associated with the video.



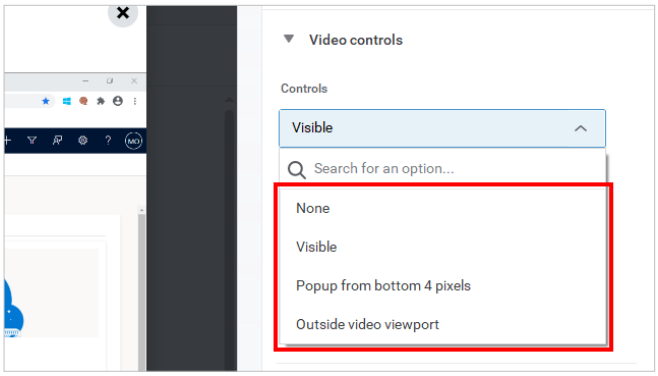
14.7.2.10.2. Other entities associated with the Test Me Video

14.7.2.10.2.1. Video Controls

14.7.2.10.2.2. Controls

Controls: The video controls allow you to play, pause, adjust the volume, and forward your videos. These are the following options available under the control panel.

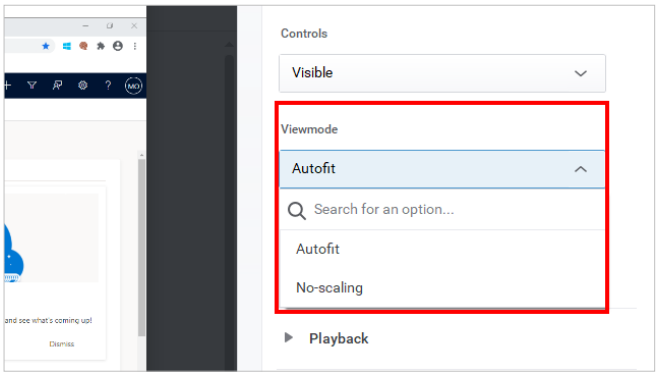
- None
- Visible
- Popup from bottom 4 pixels
- Outside video viewport



14.7.2.10.2.3. Viewmode

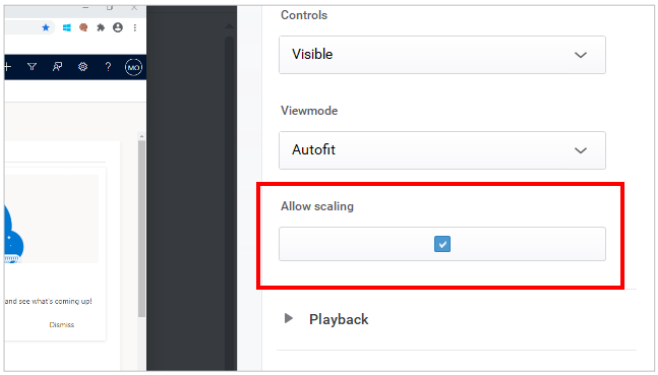
Viewmode: You can scale your recordings depending on the available screen space and keep the original recording. The viewmode offers you two options.

- Autofit
- No-scaling



14.7.2.10.2.4. Allow Scaling

Allow scaling: This property allows you to scale your recording to fit the user's screen size.

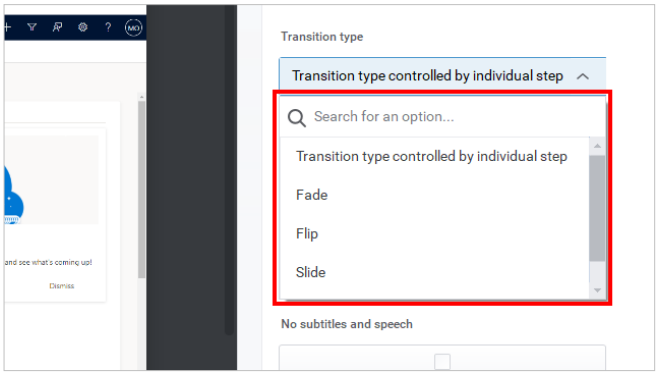


14.7.2.10.2.5. Playback

14.7.2.10.2.6. Transition Type

Transition type: This option allows you to set the transition type for the steps in your recording. This offers you with five different options.

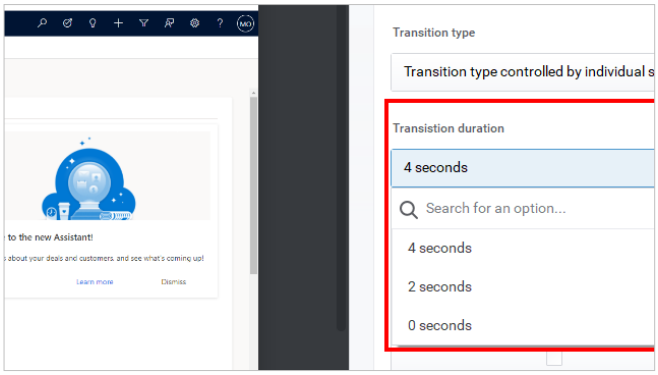
- Transition type controlled by individual step
- Fade
- Flip
- Slide
- None



14.7.2.10.2.7. Transition Duration

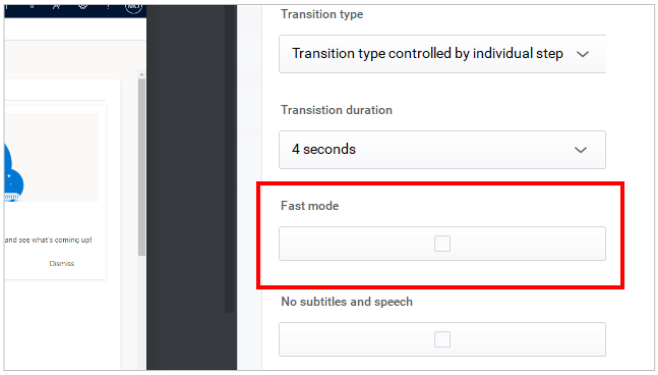
Transition duration: You can set the time limit for the transition. This offers three different options.

- 4 seconds
- 2 seconds
- 0 seconds



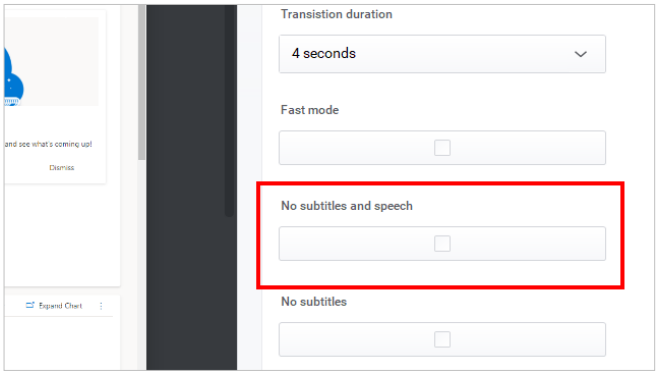
14.7.2.10.2.8. Fast Mode

Fast mode: You can make the audio and movements faster.



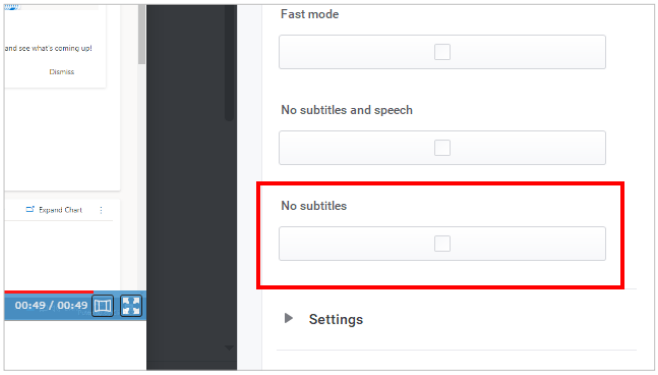
14.7.2.10.2.9. No subtitles and speech

No subtitles and speech: The video will not include subtitles and speech.



14.7.2.10.2.10. No Subtitles

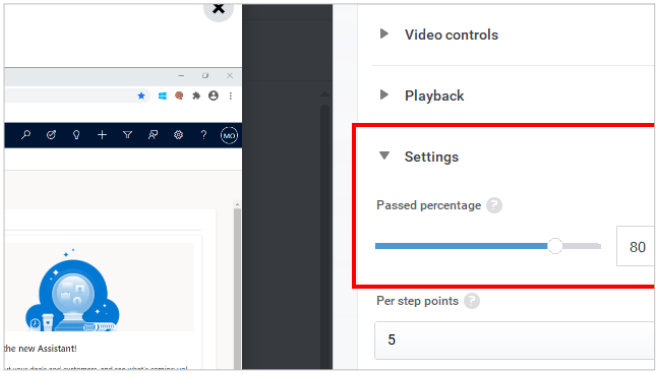
No subtitles: The video will not include subtitles.



14.7.2.10.2.11. Settings

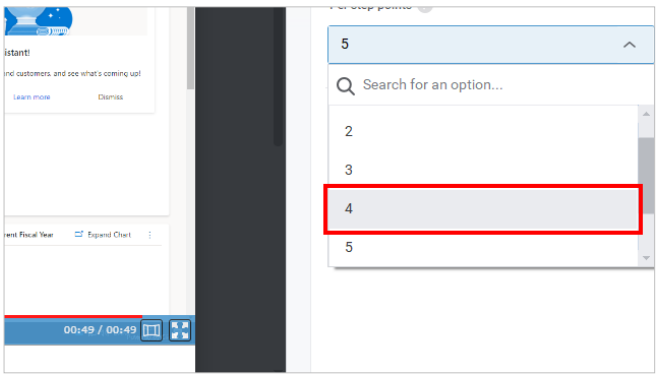
14.7.2.10.2.12. Passed Percentage

Passed percentage: You can set the percentage for correct clicks to indicate a passed score. The SCORM setting inside the LMS system will overwrite this for SCORM packages.



14.7.2.10.2.13. Per Step Points

Per step points: You can assign the number of points for each step. This offers you with seven options.

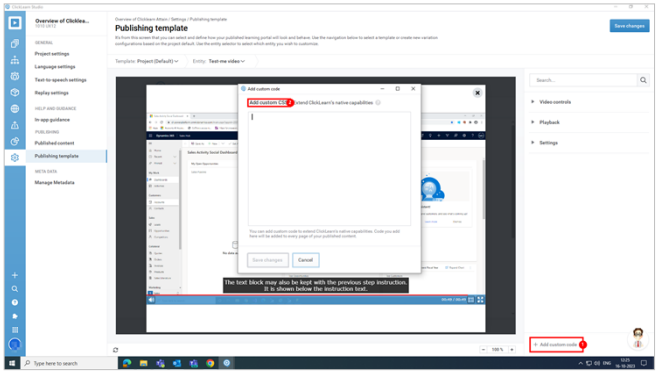


14.7.2.10.2.14. Add Custom Code

Custom code

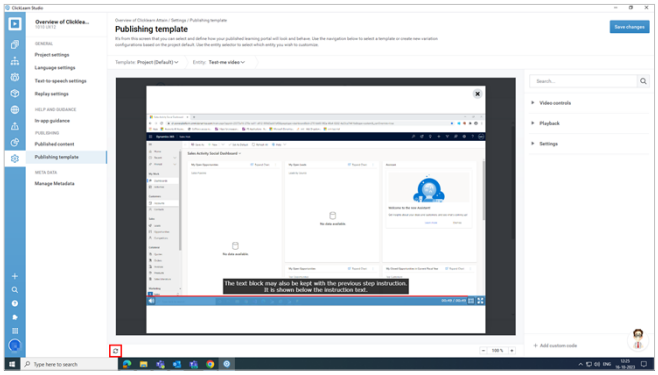
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your Custom CSS code to style the published content.



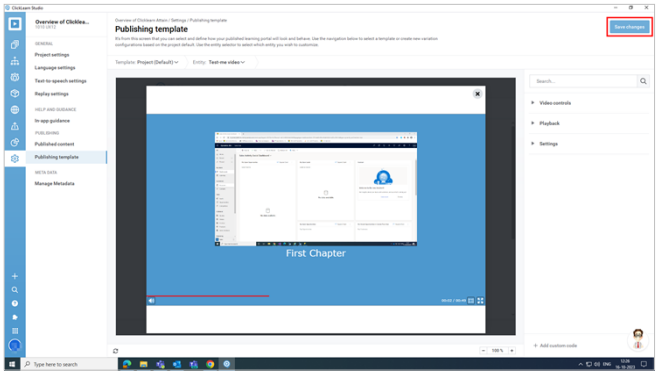
14.7.2.10.2.15. Refresh

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



14.7.2.10.2.16. Save Changes

Save changes: This will save all your changes on the entity test me video.

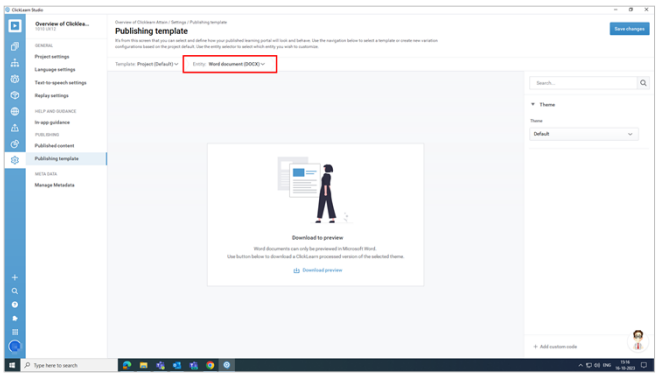


14.7.2.11. Entity Word Document

Generate professional, on-brand Word documents from your recordings using the default theme or your own custom template, keeping training materials consistent across every output.

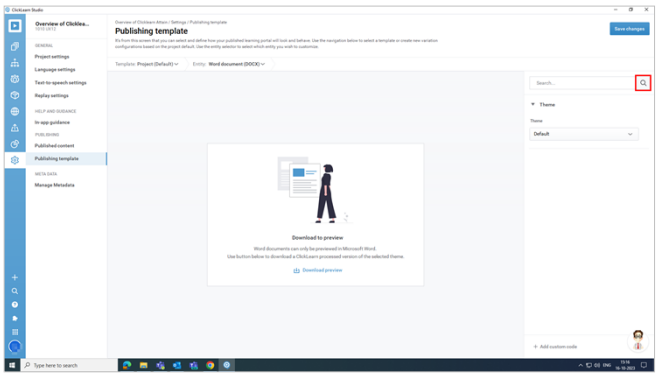
14.7.2.11.1. Word Document

Word document (DOCX): This screen displays what the Word Document looks like.



14.7.2.11.1.1. Search

Search: This allows you to search any properties associated with the Word Document.

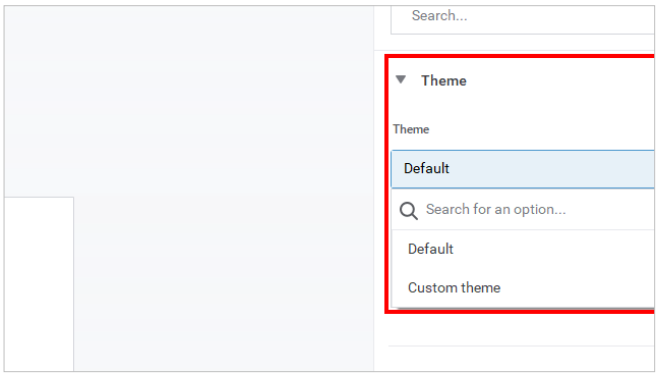


14.7.2.11.2. Other entities associated with the Word Document

14.7.2.11.2.1. Theme

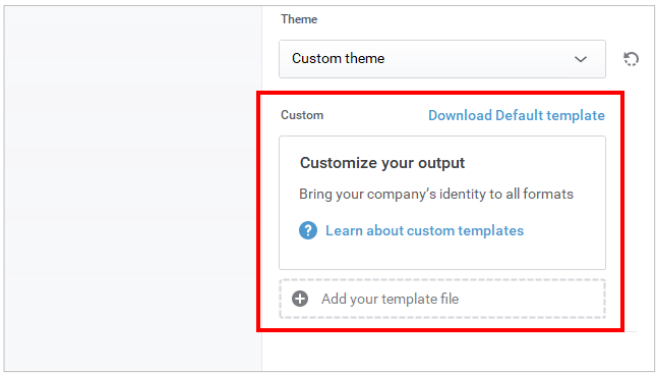
Theme: The default theme is a simple and ready-to-use option for your recordings. However, you can also create a custom theme if you want to personalize the theme according to your project needs. There are two options.

- Default
- Custom Theme



14.7.2.11.2.2. Custom

Custom: You can download and customize the template according to your project needs. You can also add your template file from the "**Add your template file**" button, which pops up with a dialog box where you can select a file from another project, the current project, or your local system.

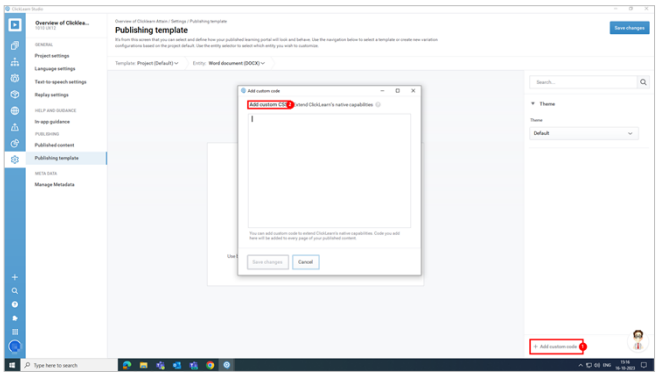


14.7.2.11.2.3. Add Custom Code

Custom code

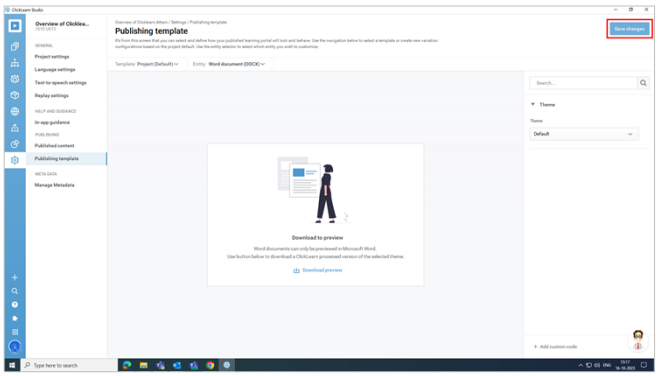
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



14.7.2.11.2.4. Save Changes

Save changes: This will save all your changes in the entity Word document.

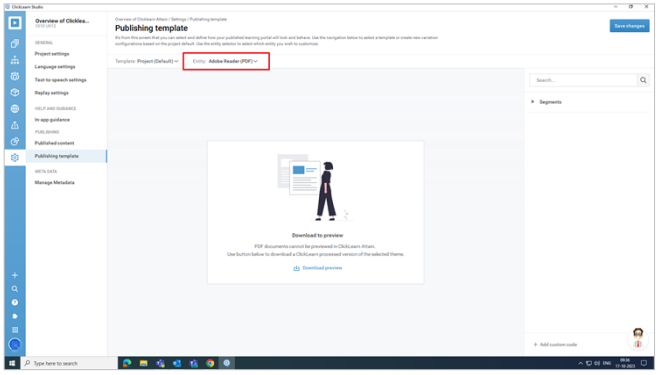


14.7.2.12. Entity Adobe Reader

Create ready-to-share PDF guides from your recordings, generate separate PDFs for each segment, and preview downloads to ensure every audience receives polished, relevant documentation.

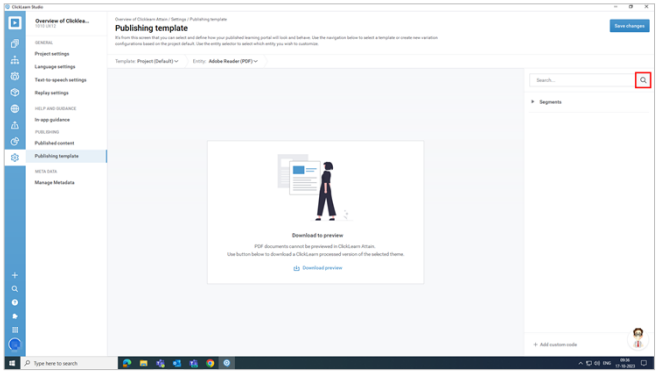
14.7.2.12.1. Adobe Reader (PDF)

Adobe Reader (PDF): This screen displays what an Adobe Reader looks like.



14.7.2.12.1.1. Search

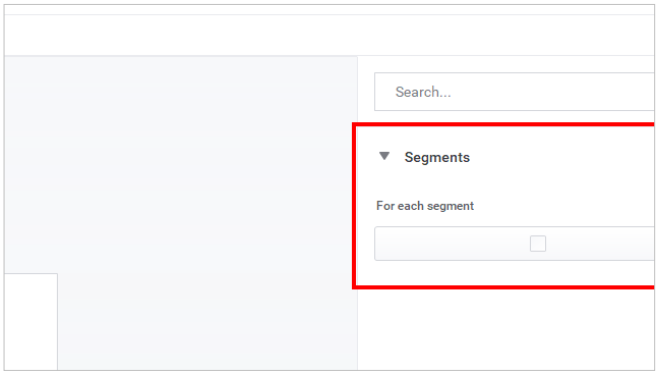
Search: This allows you to search any properties associated with the Adobe Reader.



14.7.2.12.2. Other entities associated with the entity Adobe Reader

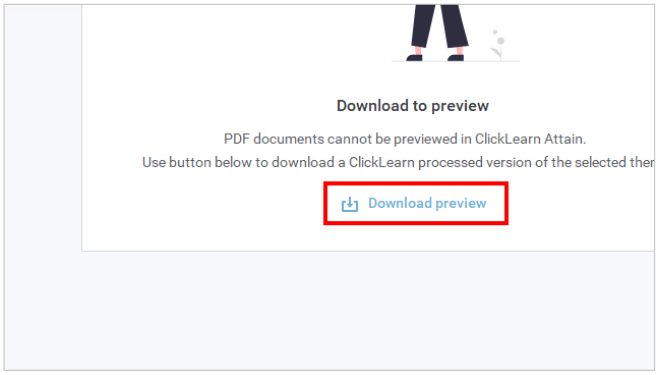
14.7.2.12.2.1. Segments

Segments: You can generate a pdf file for each segment seperatly as configured in the structure.



14.7.2.12.2.2. Download Preview

Download preview: The **Download preview** button lets you download the preview file.

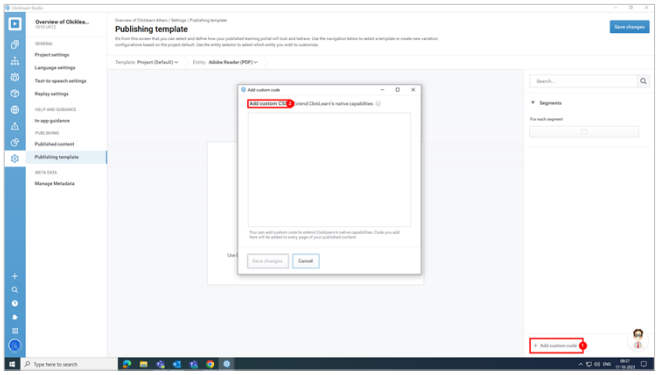


14.7.2.12.2.3. Add Custom Code

Custom code

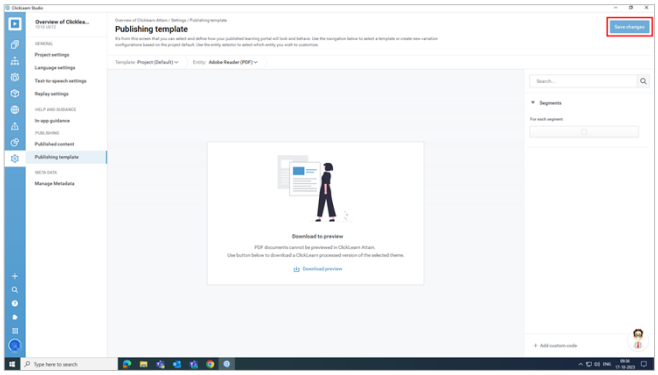
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



14.7.2.12.2.4. Save Changes

Save changes: This will save all your changes in the Adobe Reader.

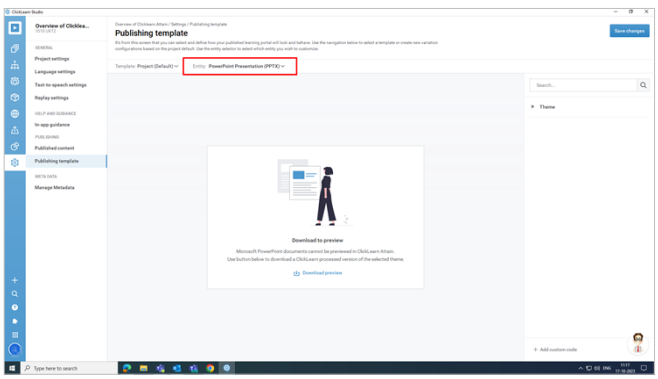


14.7.2.13. Entity PowerPoint Presentation

Turn recordings into professional, on-brand PowerPoint presentations using the default theme or your own custom template, ready for classroom training, onboarding, and stakeholder sessions.

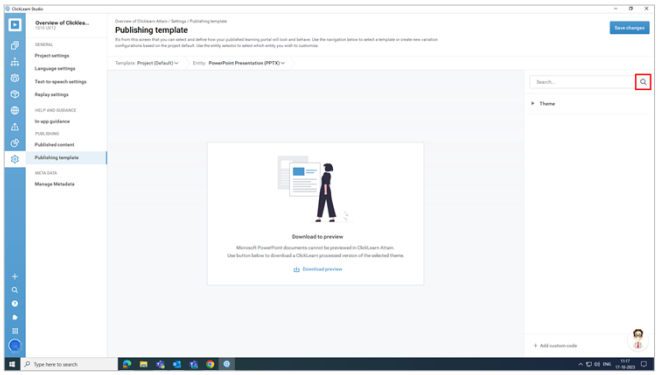
14.7.2.13.1. PowerPoint Presentation (PPTX)

PowerPoint Presentation (PPTX): This screen displays what a PowerPoint Presentation looks like.



14.7.2.13.1.1. Search

Search: This allows you to search any properties associated with the PowerPoint Presentation.

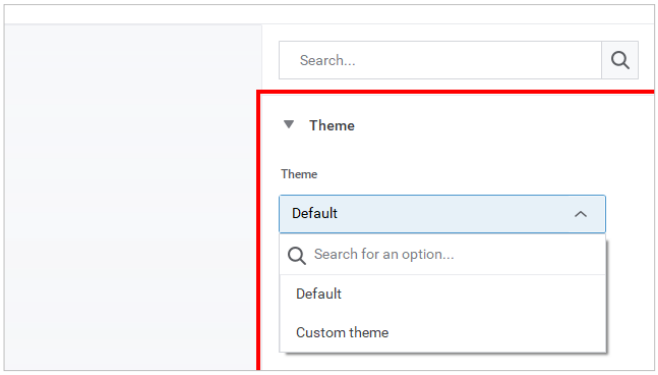


14.7.2.13.2. Other entities associated with the PowerPoint Presentation

14.7.2.13.2.1. Theme

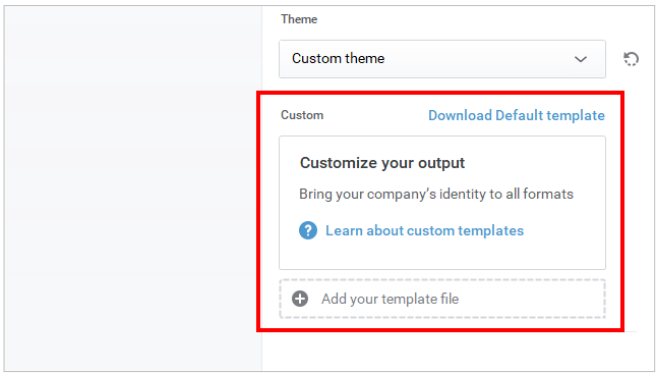
Theme: The default theme is a simple and ready-to-use option for your recordings. However, you can also create a custom theme if you want to personalize the theme according to your project needs. There are two options.

- Default
- Custom Theme



14.7.2.13.2.2. Custom

Custom: You can download and customize the template according to your project needs. You can also add your template file from the "**Add your template file**" button, which pops up with a dialog box where you can select a file from another project, the current project, or your local system.

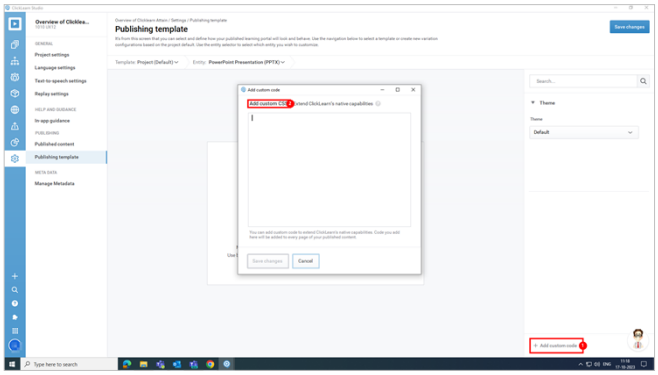


14.7.2.13.2.3. Add Custom Code

Custom code

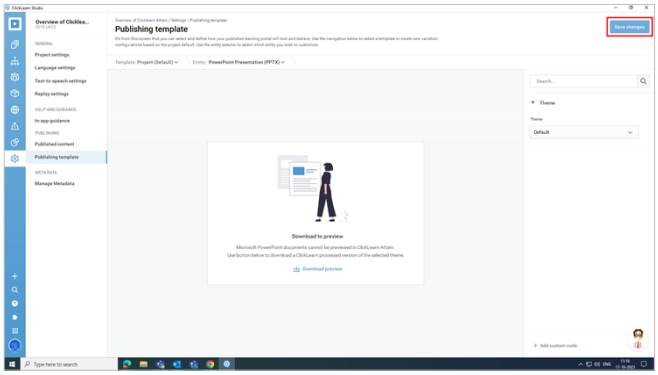
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



14.7.2.13.2.4. Save Changes

Save changes: This will save all your changes in the entity PowerPoint Presentation.

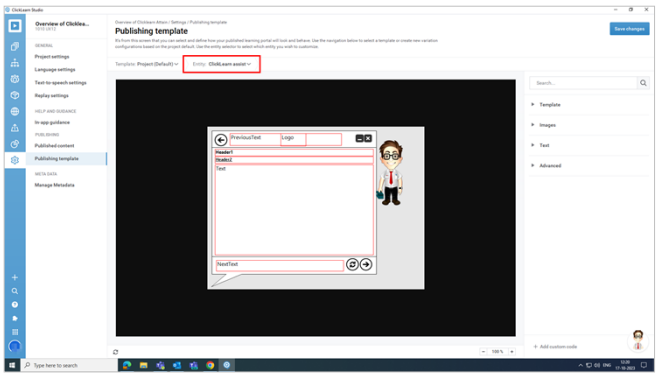


14.7.2.14. Entity ClickLearn Assist

Guide users step by step inside live applications with ClickLearn Assist, customizing templates, mascots, buttons, fonts, and display modes for a branded, in-context support experience.

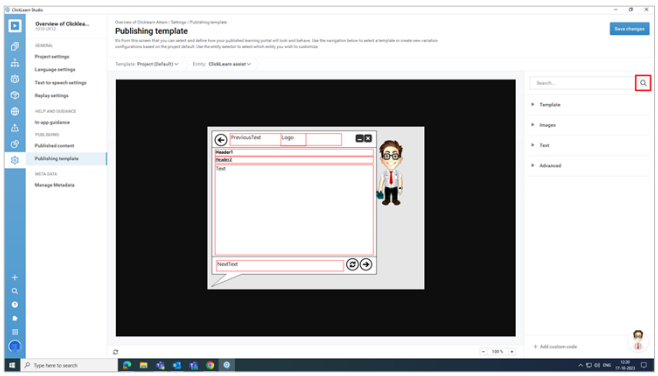
14.7.2.14.1. ClickLearn Assist

ClickLearn assist: This screen displays what a ClickLearn Assist looks like.



14.7.2.14.1.1. Search

Search: This allows you to search any properties associated with the ClickLearn Assist.



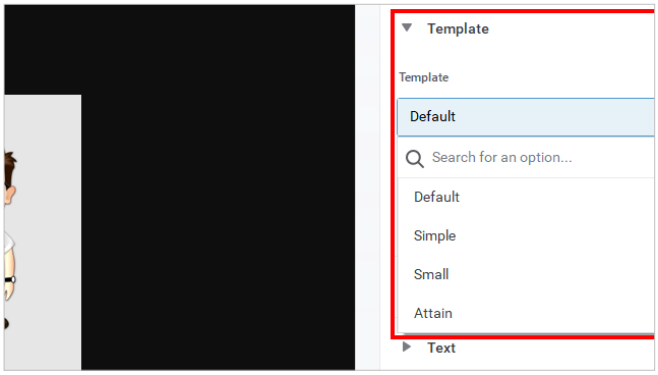
14.7.2.14.2. Other entities associated with ClickLearn Assist

14.7.2.14.2.1. Template

14.7.2.14.2.2. Template Details

Template: You can set the template according to your requirements. This offers you with four different options.

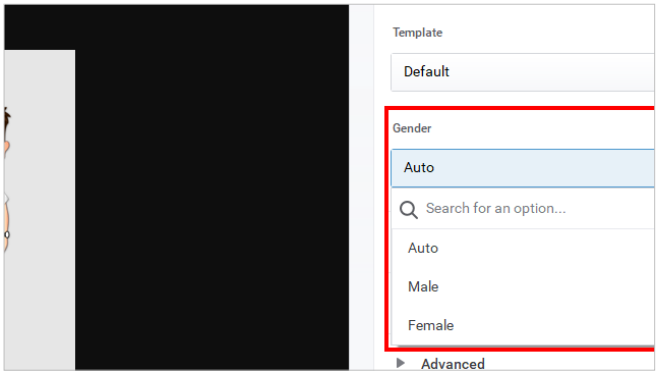
- Default
- Simple
- Small
- Attain



14.7.2.14.2.3. Gender

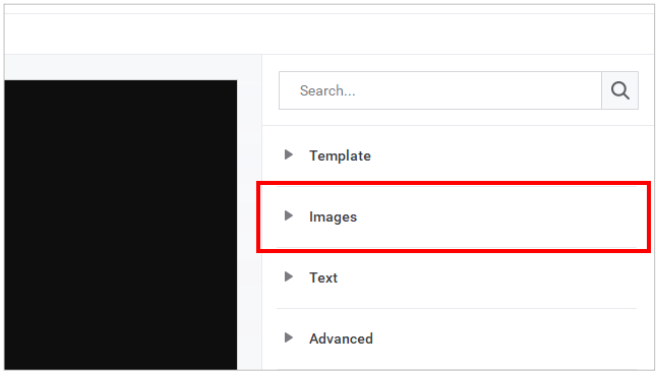
Gender: You can set the gender for your ClickLearn Assist. This offers you with three different options.

- Auto
- Male
- Female

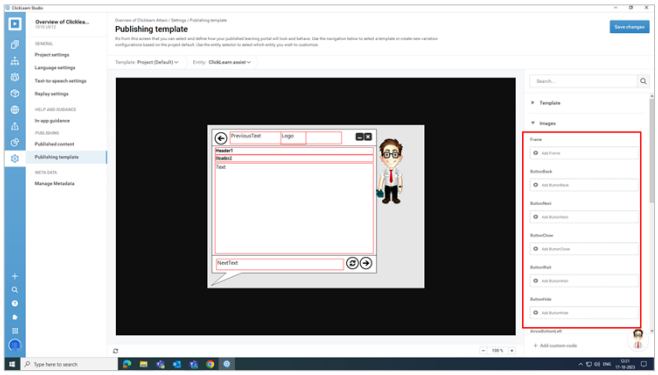


14.7.2.14.2.4. Images

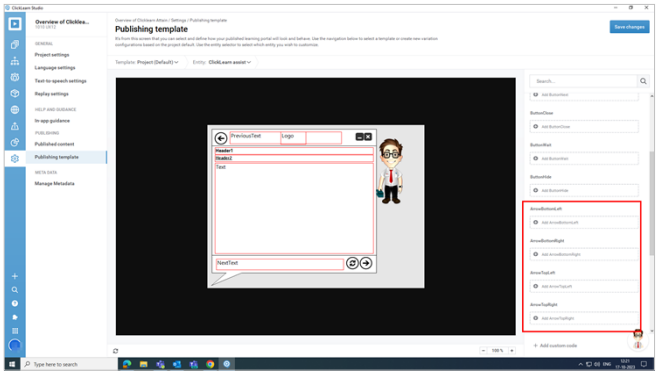
Images: You can add the following images from your current project, another project, or local system.



Images you can add to your project.



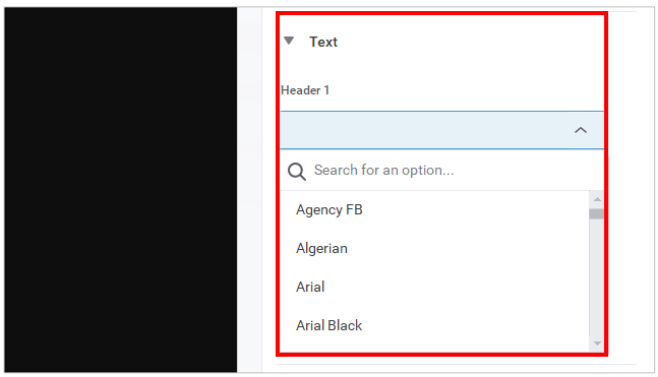
- Frame
- Button Back
- Button Next
- Button Close
- Button Wait
- Button Hide
- Arrow BottomLeft
- Arrow BottomRight
- Arrow TopLeft
- Arrow TopRight
- Mascot
- Mascot Goodbye
- Mascot Info
- Mascot Step



14.7.2.14.2.5. **Text**

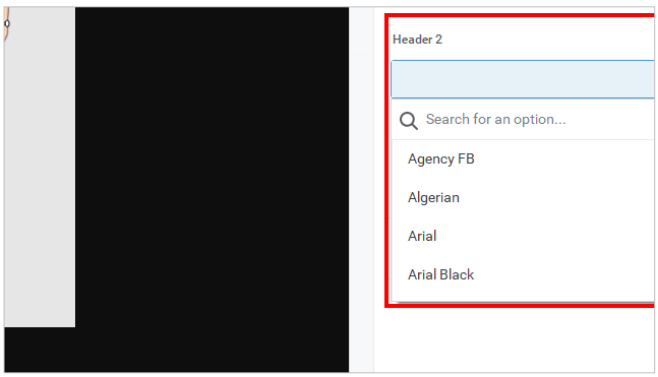
14.7.2.14.2.6. **Header 1**

Header 1: You can set the fonts for **header 1** according to project requirements.



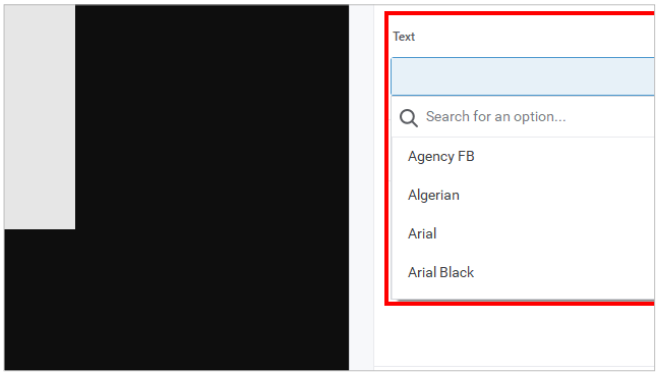
14.7.2.14.2.7. **Header 2**

Header 2: You can set the fonts for **header 2** according to project requirements.



14.7.2.14.2.8. **Text**

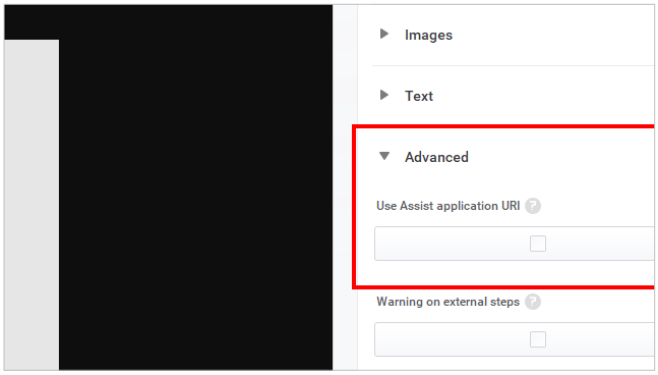
Text: You can set the fonts for your text according to your project requirements.



14.7.2.14.2.9. **Advanced**

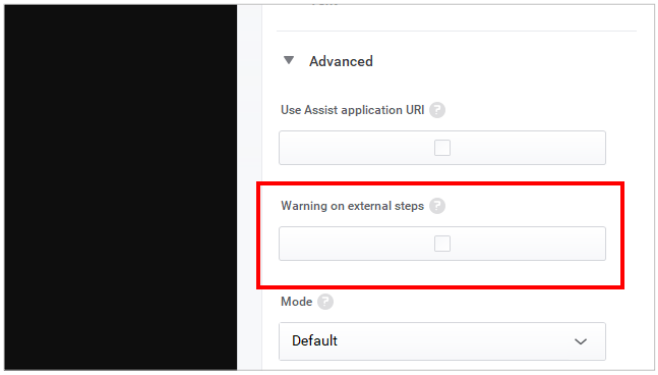
14.7.2.14.2.10. **Use Assist Application URL**

Use Assist application URL: To use the assist application URL, you must use the installed Assist MSI package. The application must be registered on each PC with https://apps.clicklearn.com/CLAssistURL.reg.



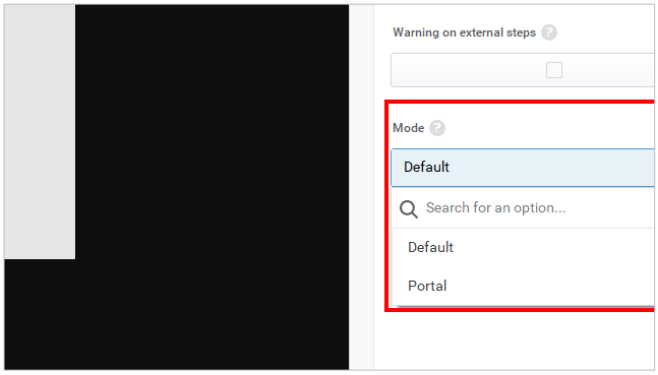
14.7.2.14.2.11. Warning on external steps

Warning on external steps: It displays a warning when recordings contain steps that are not web-related, causing inside assistance in CE/BC or custom websites to stop.



14.7.2.14.2.12. Mode

Mode: You can control how the assistant is displayed within the application. This setting is **ONLY** intended for web applications using the ClickLearn Assist browser extension. You can use the default or the portal option based on your project requirements.

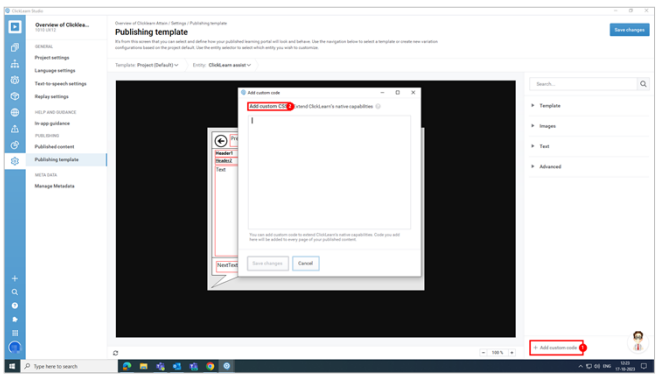


14.7.2.14.2.13. Add Custom Code

Custom code

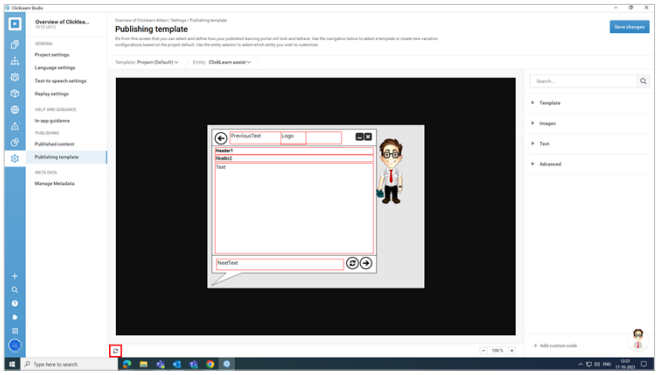
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



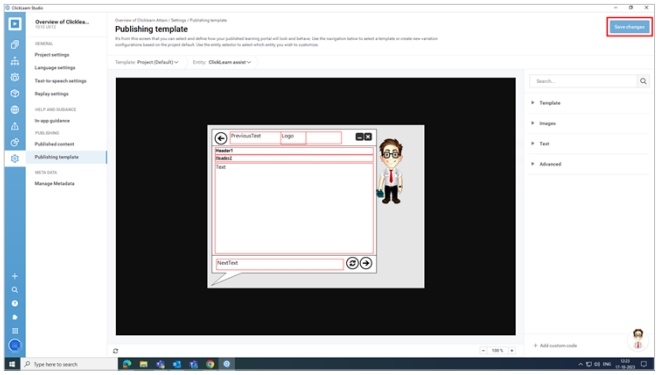
14.7.2.14.2.14. Refresh

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



14.7.2.14.2.15. Save Changes

Save changes: This will save all your changes on the entity ClickLearn Assist.

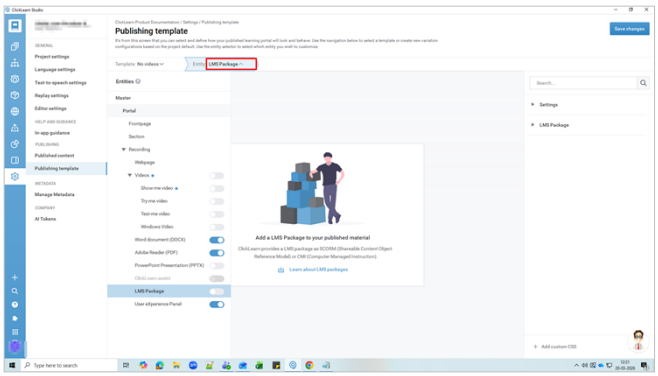


14.7.2.15. Entity LMS Package

Deliver trackable training through your LMS with packages that report completion, enforce learning sequences, set passing scores, and can be generated per recording.

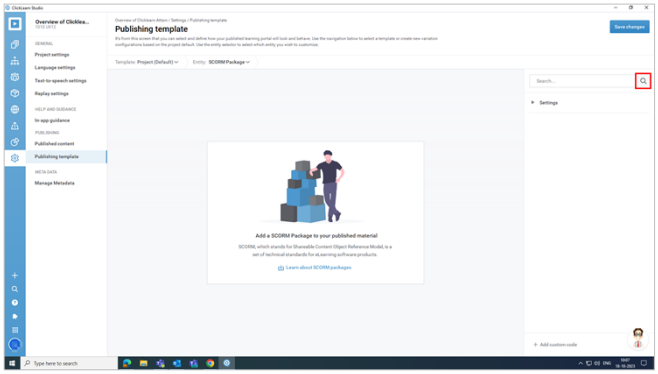
14.7.2.15.1. LMS Package

LMS Package: This screen displays what a LMS package screen looks like.



14.7.2.15.1.1. Search

Search: This allows you to search any properties associated with the LMS package.

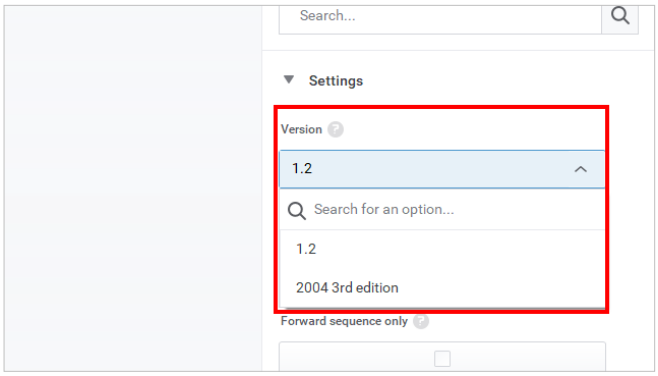


14.7.2.15.2. Other entities associated with the LMS Package

14.7.2.15.2.1. Settings

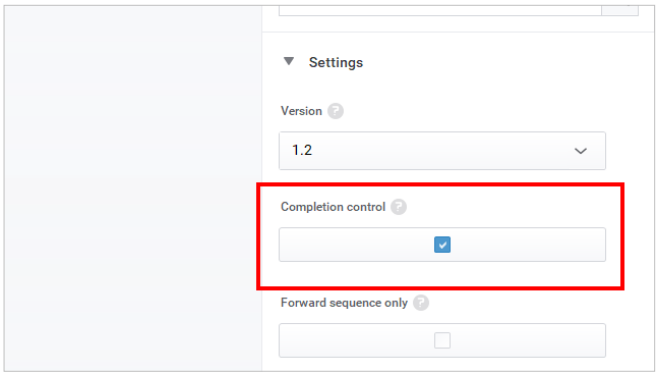
14.7.2.15.2.2. Version

Version: You can export the LMS version. Please make sure to check with your LMS documentation for compatibility.



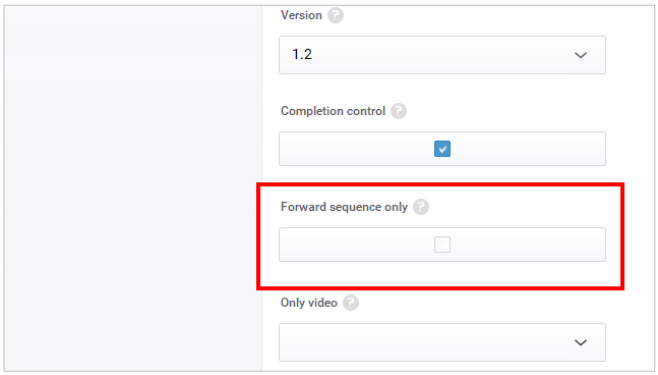
14.7.2.15.2.3. Completion Control

Completion control: This will notify LMS when the end user has completed a section.



14.7.2.15.2.4. Forward sequence only

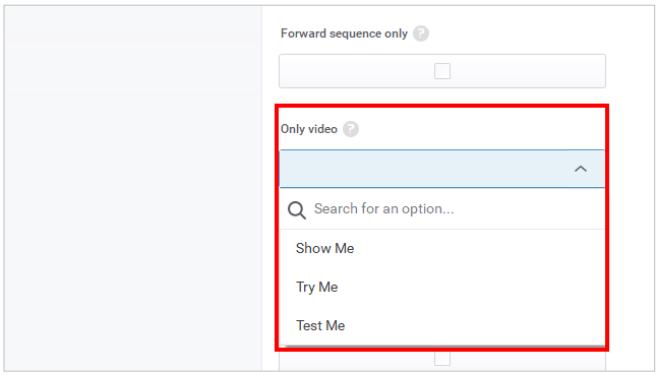
Forward sequence only: This restricts the user to moving forward only through the table of contents.



14.7.2.15.2.5. Only Video

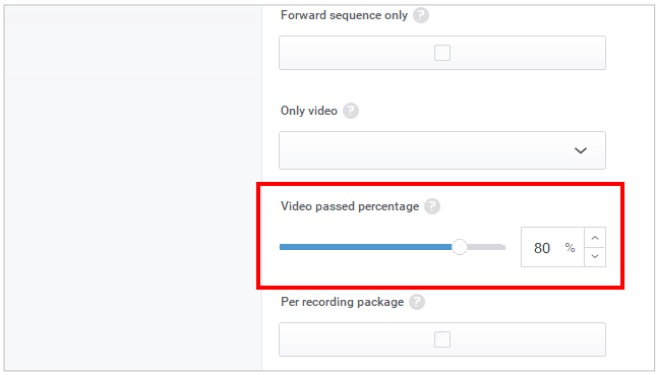
Only video: You can generate a video of selected items from the available options for testing to end users. This offers you with three options.

- Show Me
- Try Me
- Test Me



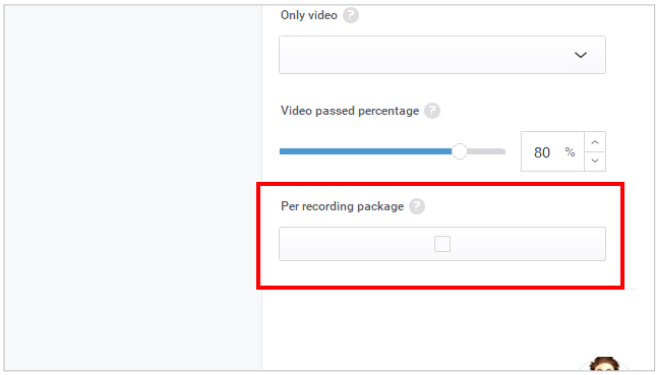
14.7.2.15.2.6. Video passed percentage

Video passed percentage: You can set the percentage for correct clicks to indicate a passing score to the LMS. You can set the percentage according to your project requirements.



14.7.2.15.2.7. Per Recording Package

Per recording package: You can also generate a separate LMS package for each recording in the structure.

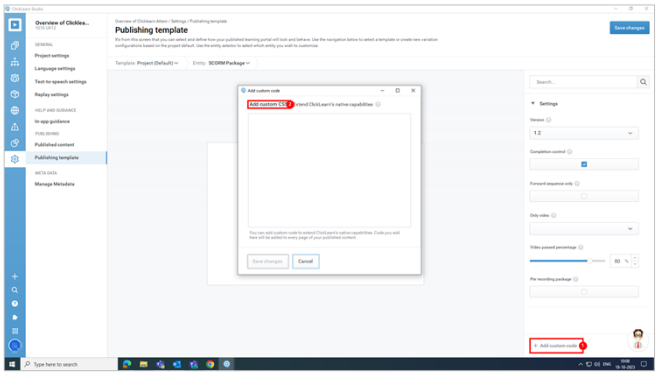


14.7.2.15.2.8. Add Custom Code

Custom code

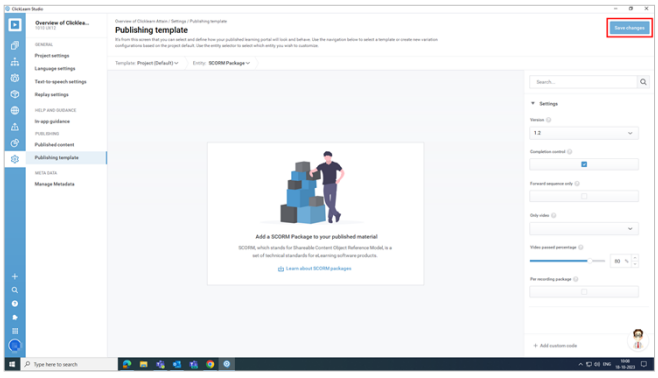
1. Click on the button **Add custom code**.
2. **Add Custom Code:** Add custom code to extend ClickLearn's native capabilities. The code you add here will appear on every page of your published content.

   Paste or write your custom CSS code to style the published content.



14.7.2.15.2.9. Save Changes

Save changes: This will save all your changes on the entity LMS Package.



14.7.3. Use a Brand Font on the Learning Portal

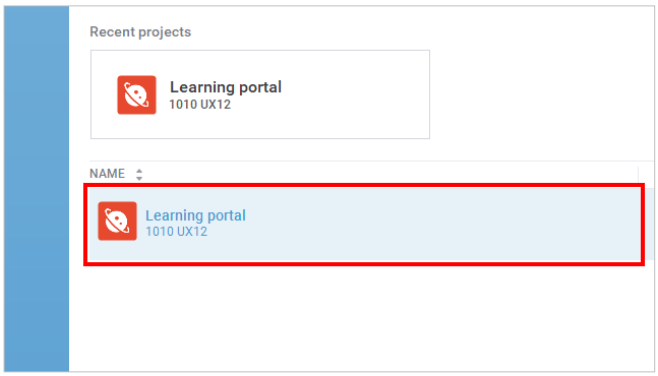
Your brand's look across the whole portal, to upload your font, add a little custom CSS, and publish so every page matches your identity without touching the core design.

14.7.3.1. Introduction

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

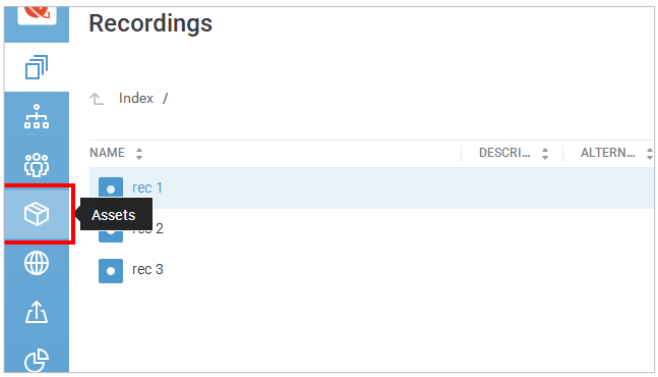
14.7.3.2. Procedure

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

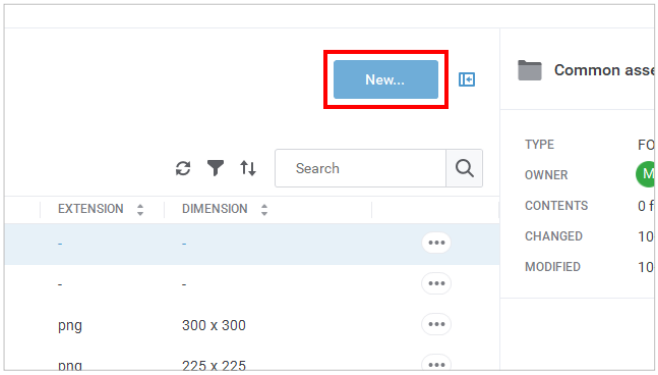


14.7.3.2.1. Create a folder by name 'redist' in assets to add font file there

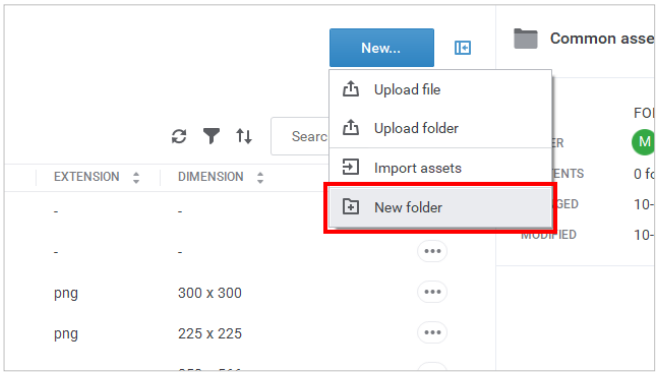
Click on the button **Assets**



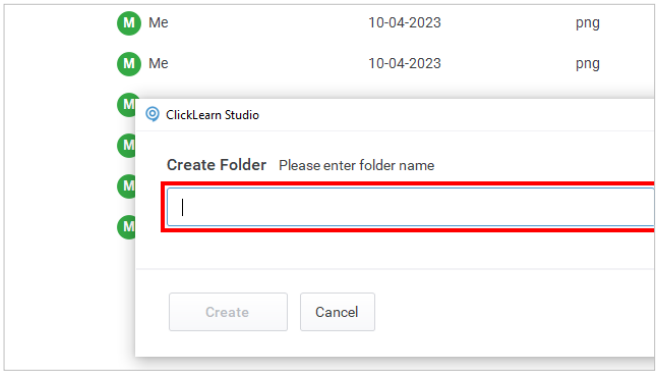
Click on the button **New...**



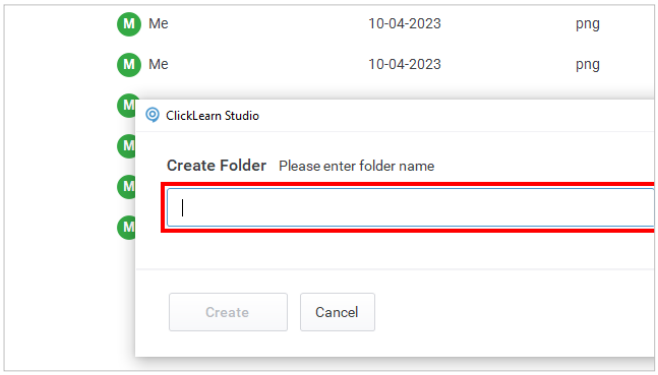
Click on the menu item **New folder**



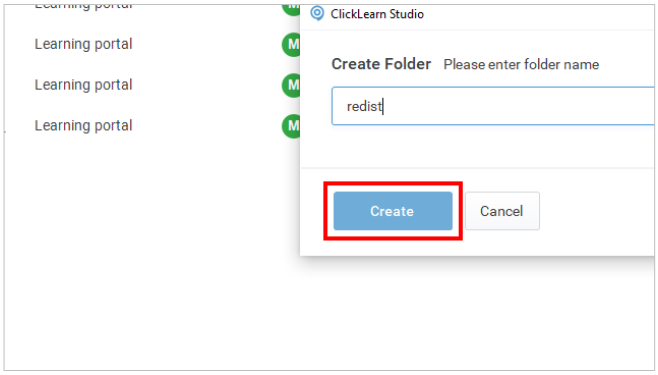
Click on the textbox **Name**



Enter **Name**.

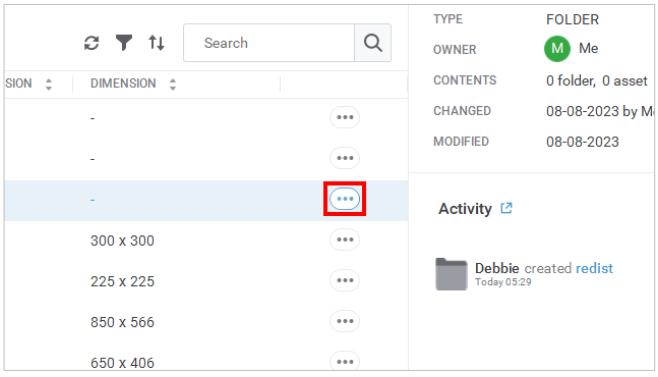


Click on the button **Create**

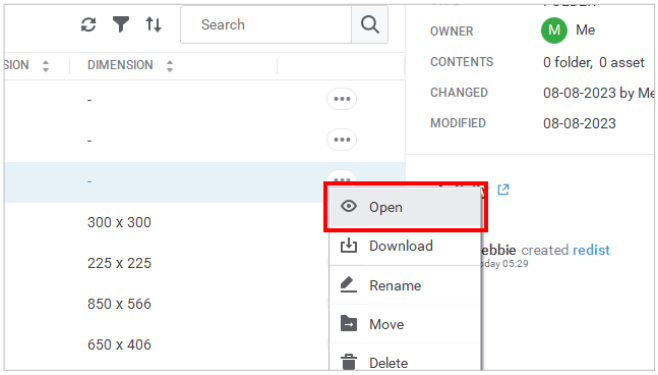


14.7.3.2.1.1. **Add font file in redist folder**

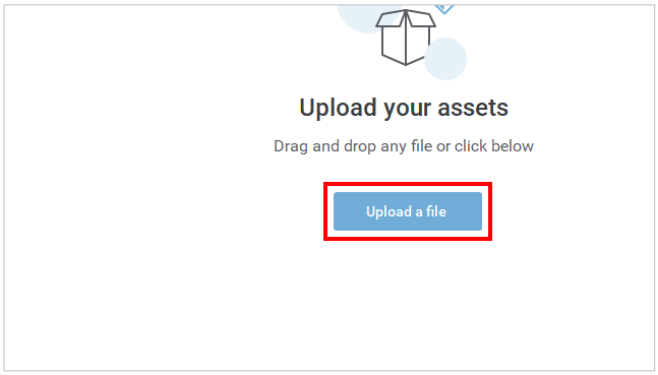
Click on the button **More** of grid cell **Action**



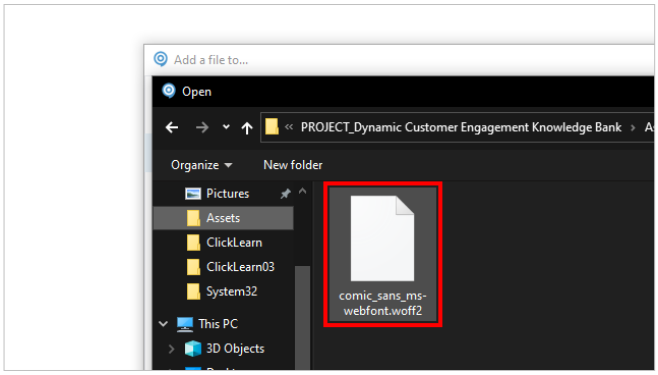
Click on the menu item **Open**



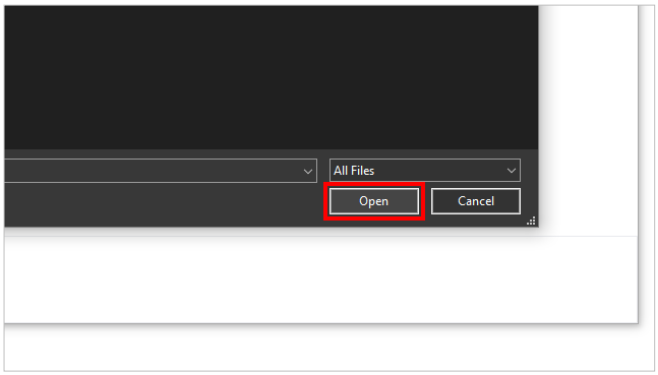
Click on the button **Upload a file**



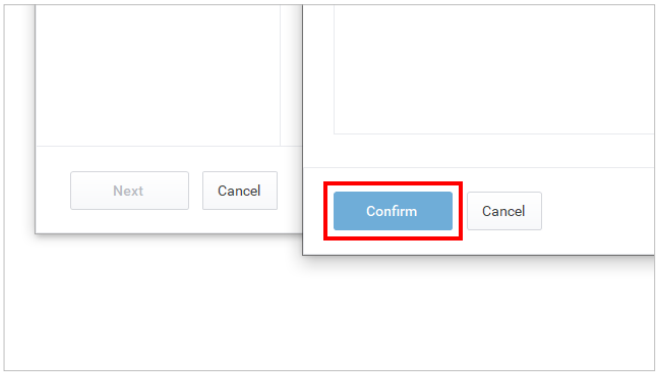
Click on the list element **comic_sans_ms-webfont.woff2**.
In your case it would be your brand font.

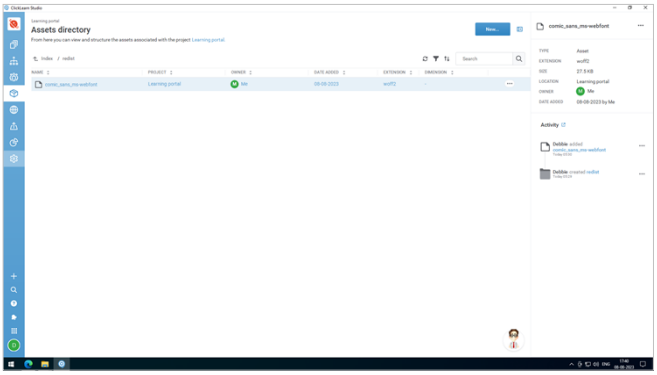


Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **Confirm**





Redist folder should look like this

14.7.3.2.2. Custom CSS

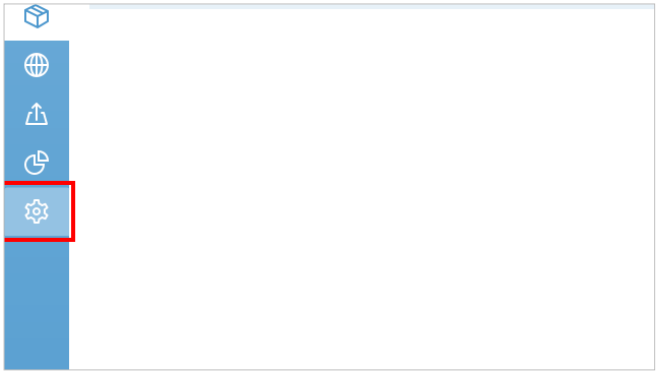
14.7.3.2.2.1. Format css

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.

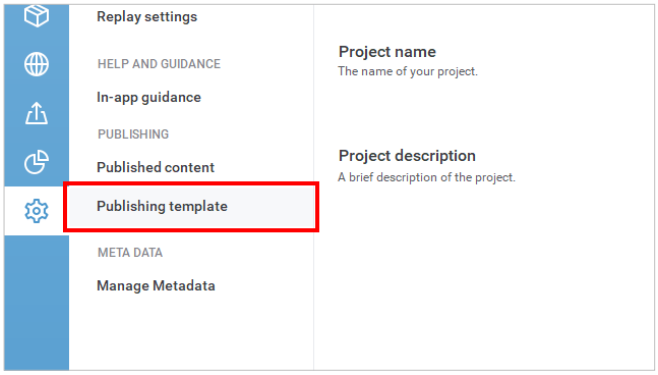
```
@font-face {  font-family: 'MyWebFont';  src: url('comic_sans_ms-webfont.woff2') format('woff2');}
body,
button,
input,
optgroup,
select,
textarea,
.cljsvNoteText,
.cljsvIntroTitleText,
.cljsvIntroDescText,
.cljsvChapterText
{
    font-family:MyWebFont,sans-serif;
}
```

14.7.3.2.2.2. Add custom css

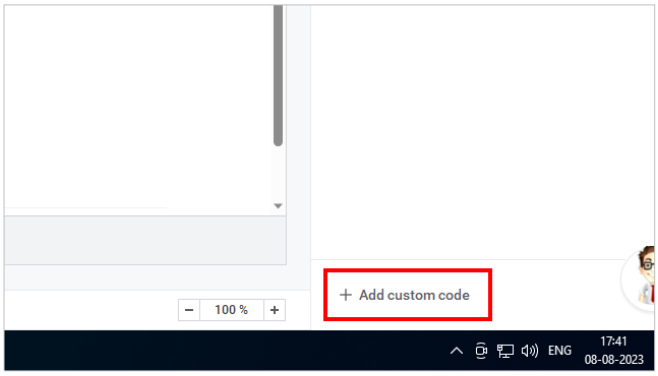
Click on the button **Settings**



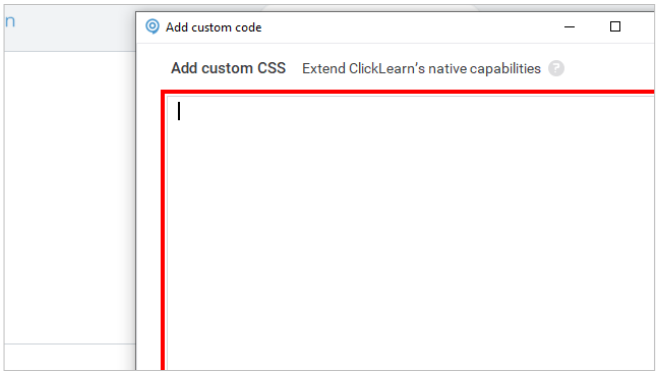
Click on the button **Publishing template**



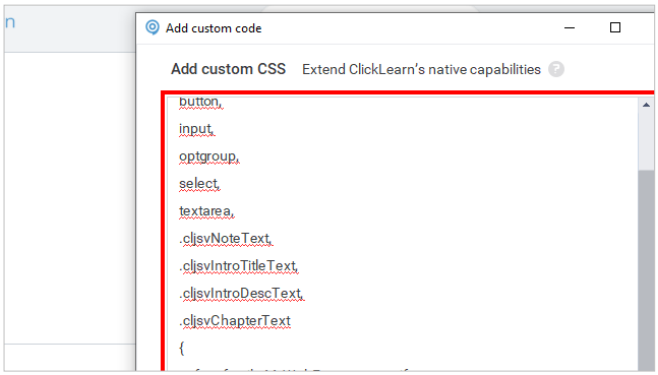
Click on the button **Add custom code**



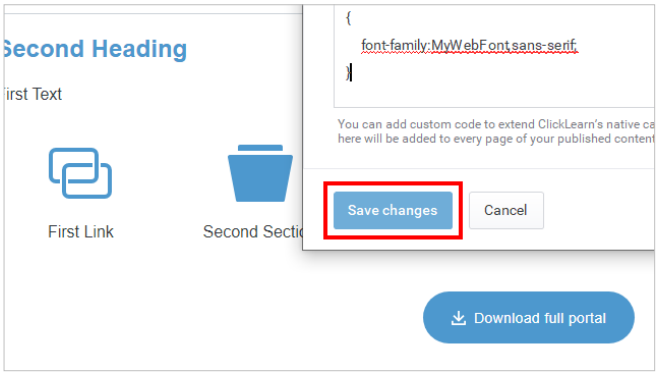
Click on the text editor



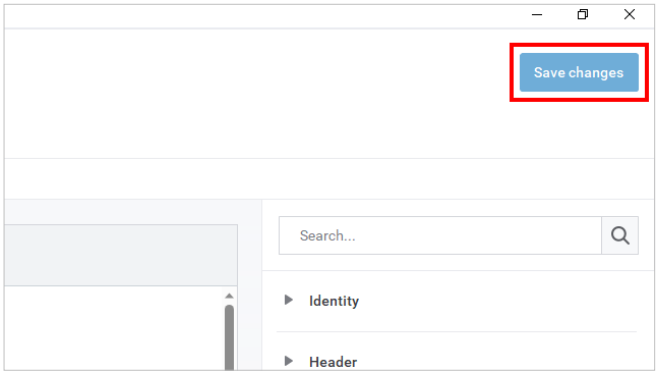
Enter the attached css code.



Click on the button **Save changes**



Click on the button **Save changes**



14.7.3.3. PS

Produce and publish your content to see the changes.

14.8. Manage Metadata

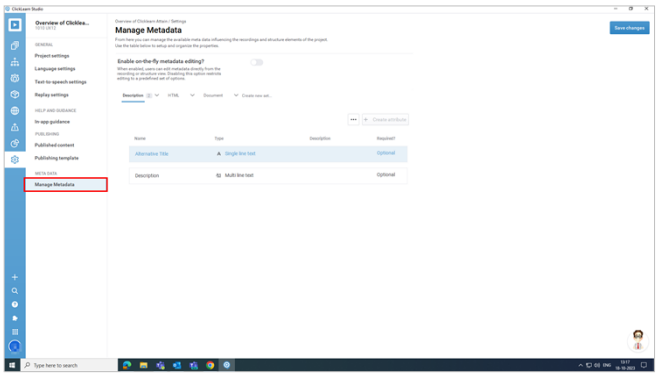
14.8.1. Overview of Manage Metadata

Rich, searchable metadata across your project, to set descriptions and keywords, track authors and workflow status, and build custom property sets without leaving the metadata screen.

14.8.1.1. Introduction

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

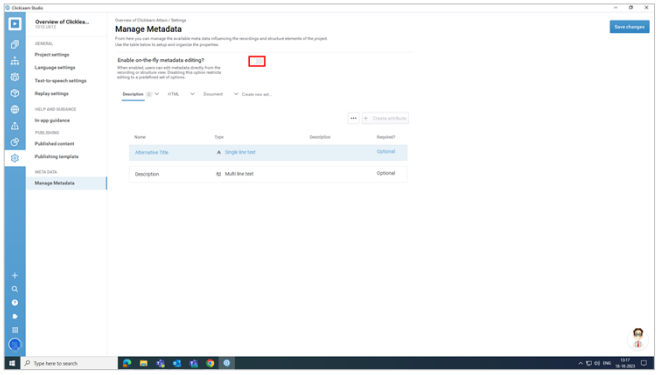
From here, you can set up and organize the properties.



14.8.1.1.1. 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.

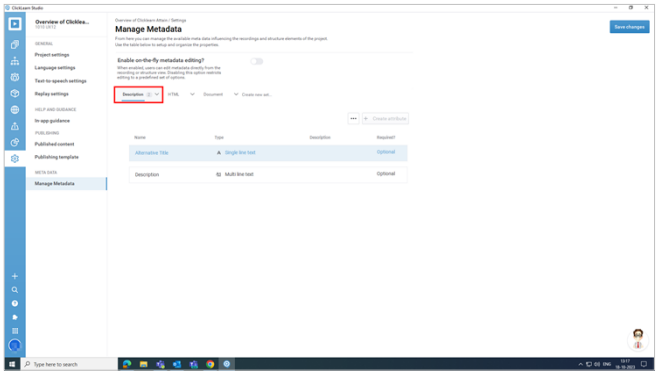


14.8.1.1.2. Pre-made sets

14.8.1.1.2.1. 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.

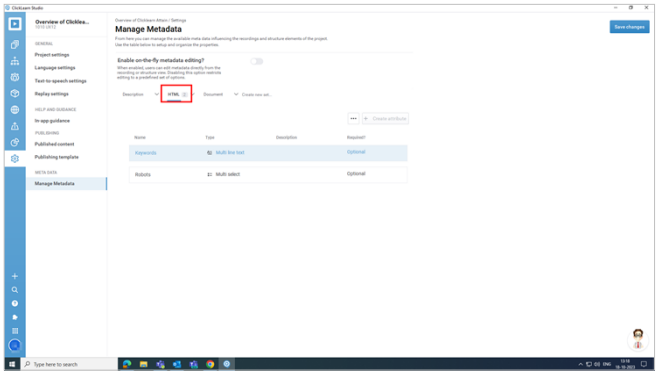


14.8.1.1.2.2. HTML

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.



14.8.1.1.2.3. 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.

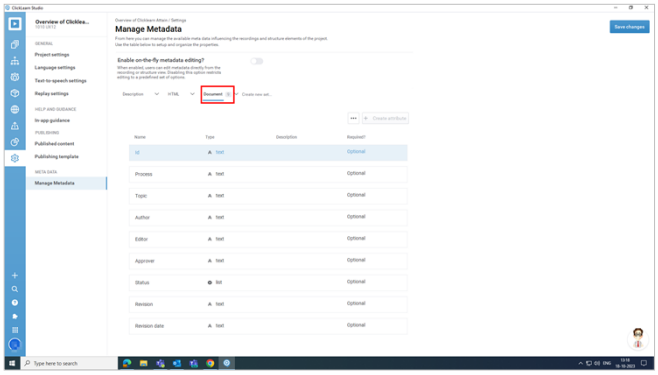
Approver: The user who approves the recording.

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.

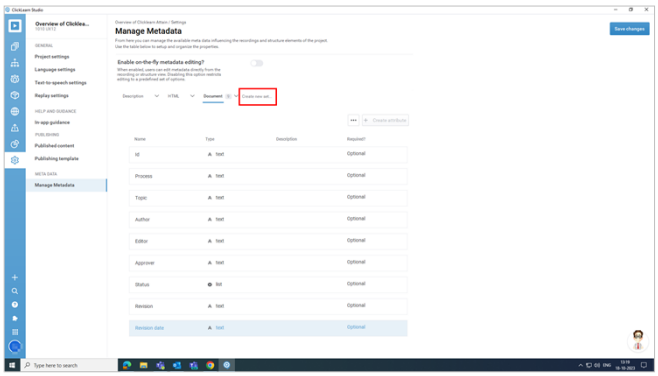
Moved to doc. man: The user can send the recording to the documentation system.

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

Revision Date: This displays the revision date.

14.8.1.1.2.4. Create new set

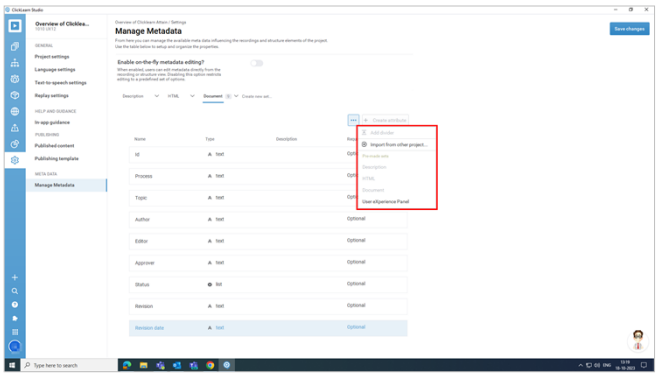
Create new set: This helps you create a new metadata section. When users address the Metadata, this will add your properties to a new tab.



14.8.1.1.2.5. More

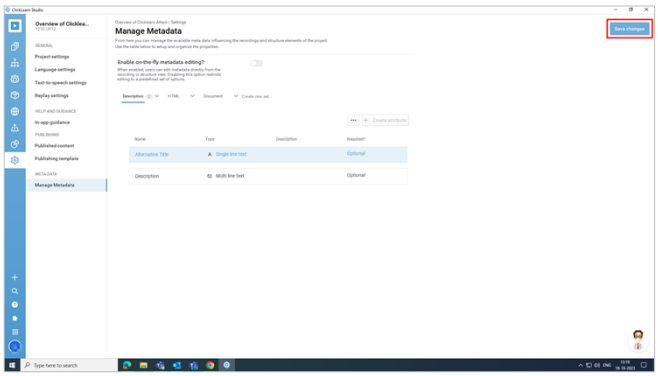
Metadata more: The options associated with more menu are as follows:

- 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.)



14.8.1.1.3. Save Changes

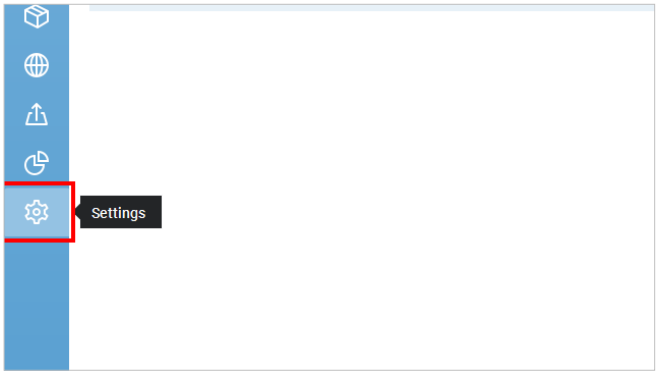
Save changes: This will save all your changes in Metadata.



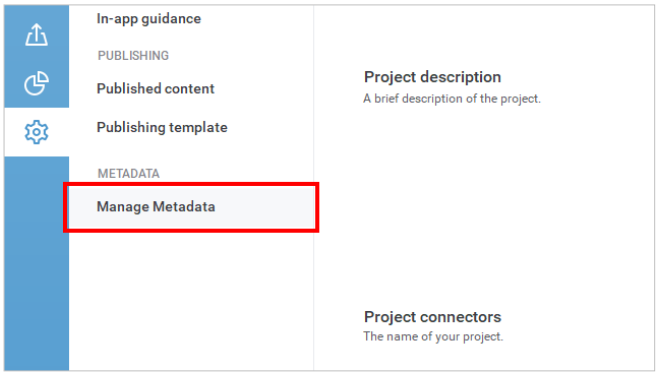
14.8.2. Enabling Metadata

Metadata ready to use in a few clicks, to enable user editing, add description and document properties, and save without complex configuration.

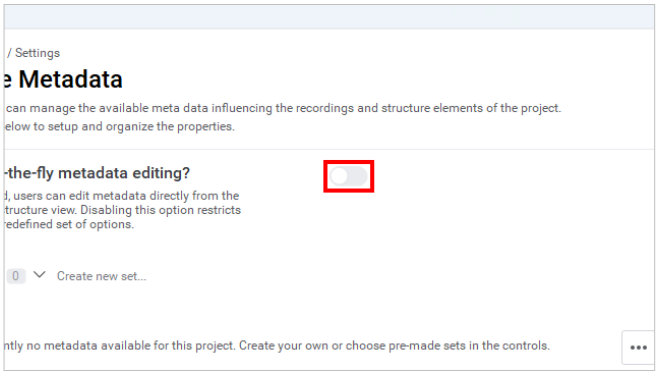
Click on the **Settings** button.



Click on the button **Manage Metadata**.

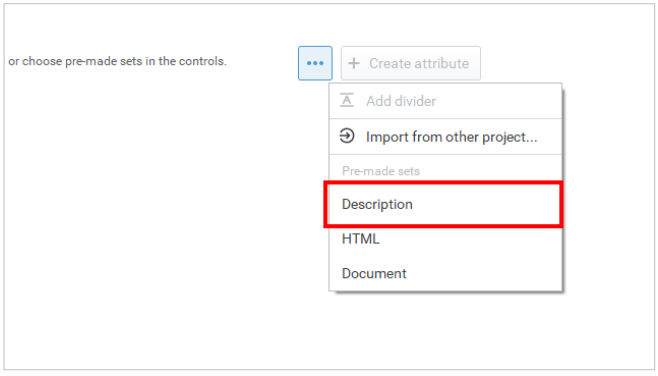


Click on the toggle switch: **Allow User Edit Properties**.

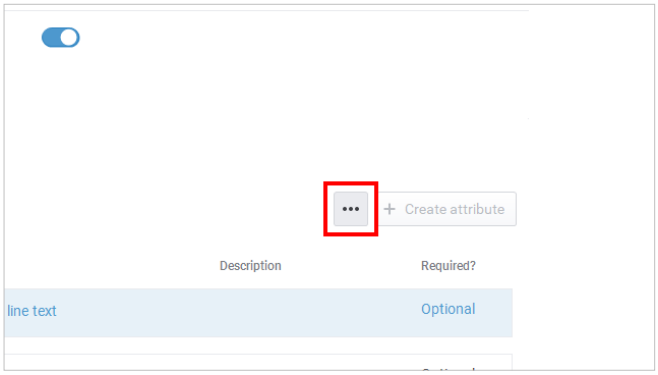


Click on the icon **Metadata more**.

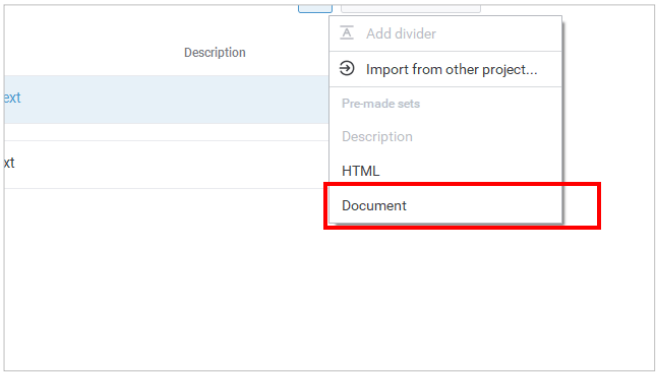
Click on the menu item **Description**.



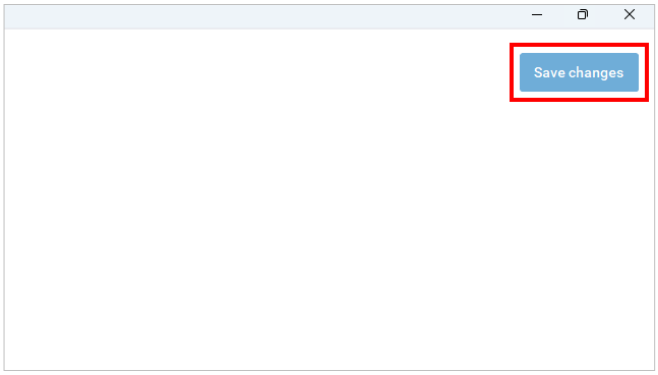
Click on the icon **Metadata more**.



Click on the menu item **Document**.



Click on the button **Save changes**.



14.9.Import Dynamics AX Data Model

Accurate AX control capture without manual setup, to import the Dynamics AX data model from a local file or an existing project so your recordings map cleanly to the application.

14.9.1. Introduction

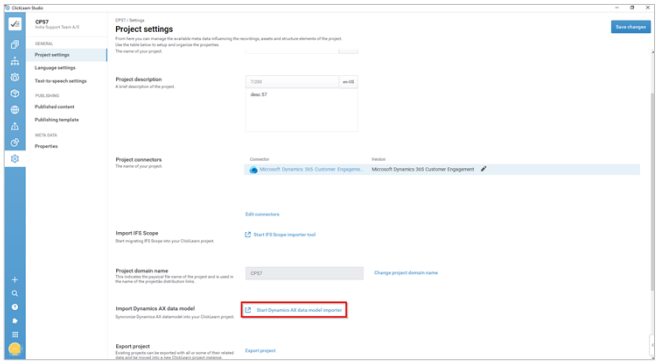
To capture the controls of AX Dynamics in ClickLearn Attain, you need to import the AX data model.

To import the AX data model, follow the steps below.

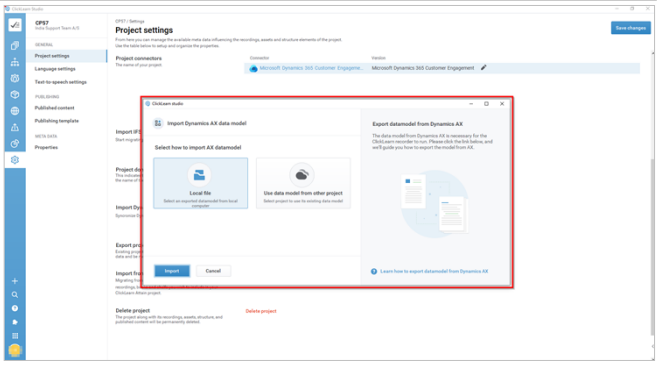
Export the data model using the guide.

Navigate to the Project **settings** page.

Click the **Start Dynamics AX data model** importer link.



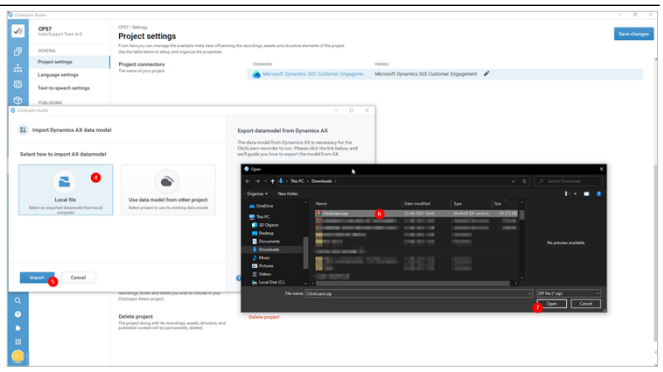
The **Import Dynamics AX data model** dialog box is displayed.



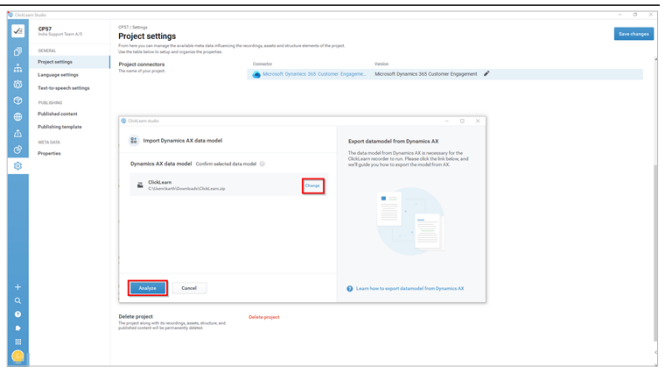
Select the **Local file** option.

Click the **Import** button.
Browse to the exported data model file.

Click the **Open** button.

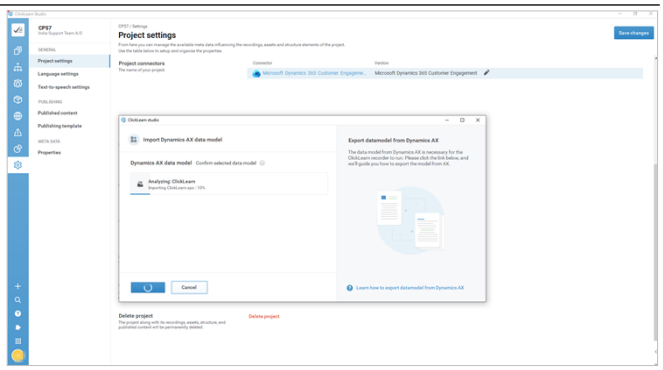


Click the **Analyze** button to confirm the path. To change the path, click the **Change** button.

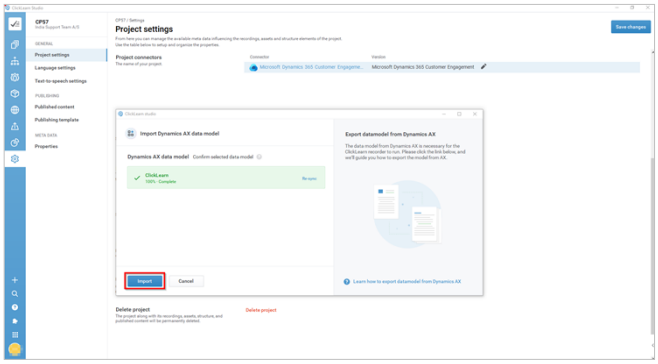


ClickLearn will analyze the selected file and display the progress.

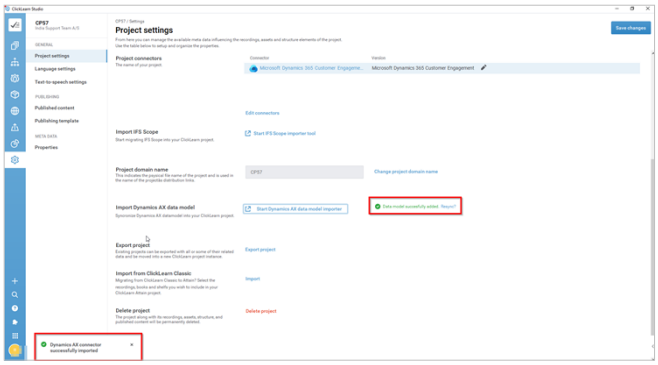
Once the analysis is complete, the status is displayed.



Click the **Import** button to proceed.



A confirmation message is displayed after successful import.



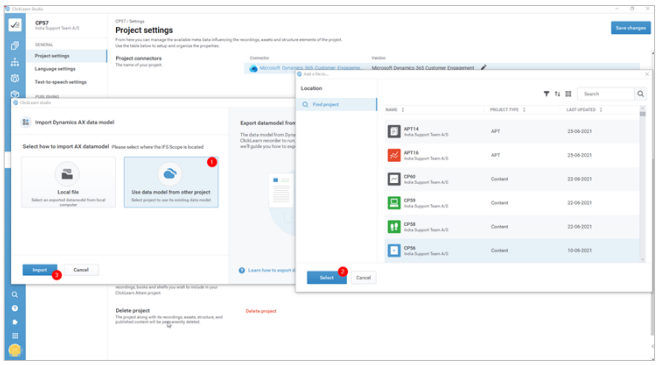
14.9.1.1. Importing Data Model from other Project

If the AX data model is imported for some other project earlier, we can select that project and import the data model. To do this, follow the steps below.

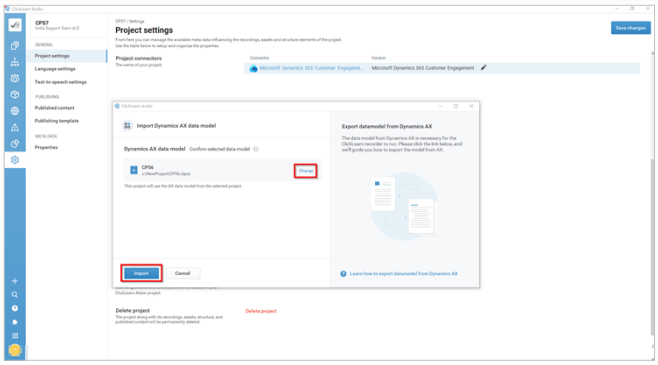
Select the **Use data model from other project** option.

Navigate to the project and click the **Select** button.

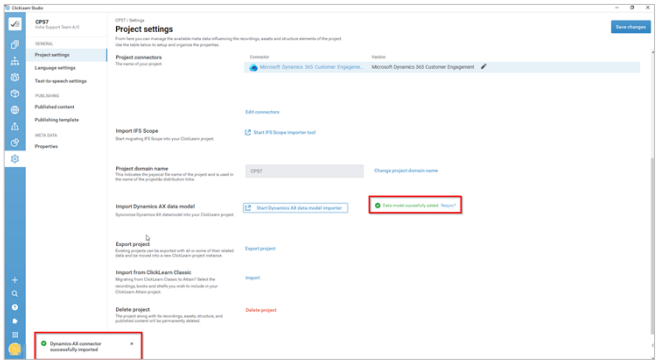
Click the **Import** button.



Click the Import button to confirm the project. To change the project, click the Change button.



A confirmation message is displayed after successful import.



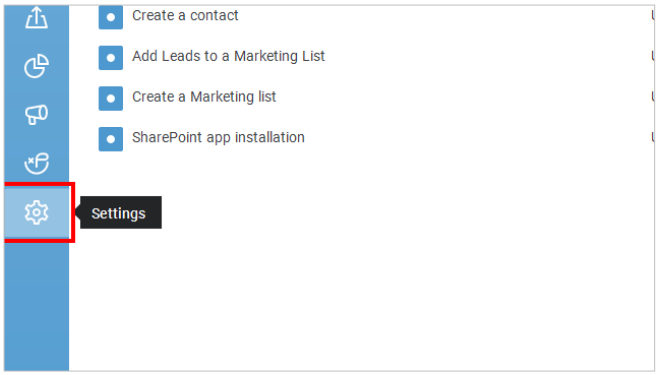
14.10. Manage AI Tokens

Complete visibility into your AI token usage, to check your balance, filter by project, user, or type, and export detailed reports without guessing where your tokens go.

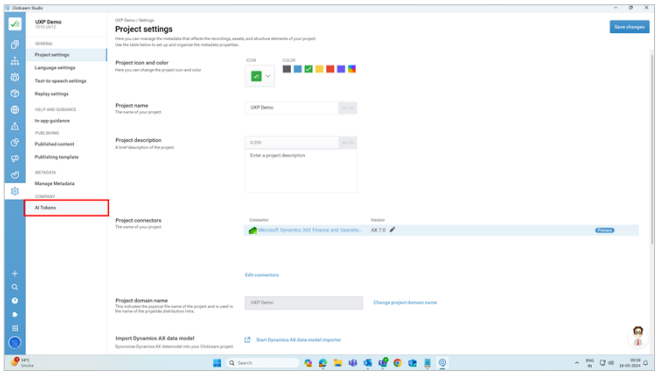
14.10.1. Introduction

AI tokens are assigned to a company to use AI-related features like UXP AI Chat and AI summarization of a recording. AI tokens are assigned depending on your license type and additional tokens can be assigned too. The AI tokens page will give you insights into the token usage.

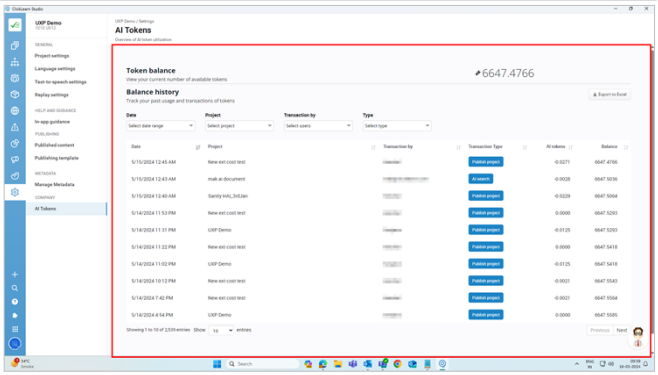
Click on the **Settings** button.



Click on the **AI Tokens** button.

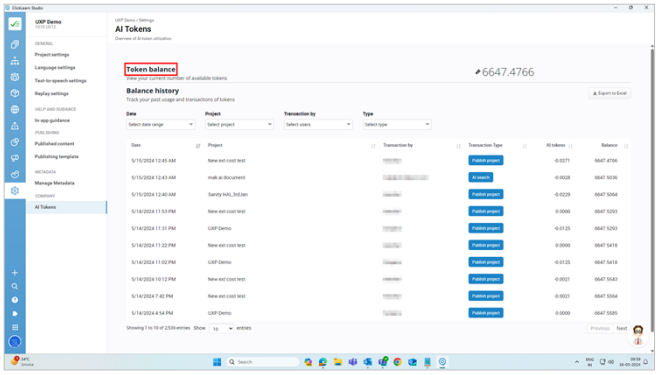


Overview of the AI tokens page.

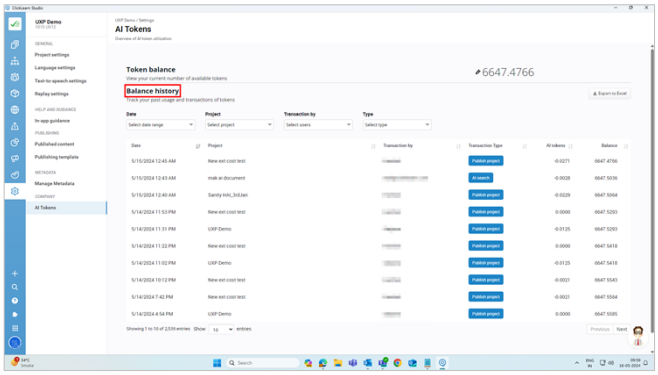


14.10.1.1. Components of AI tokens page

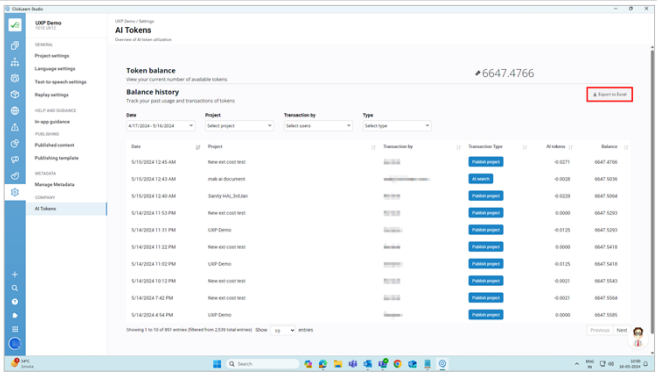
Token balance: This displays the current number of available tokens.



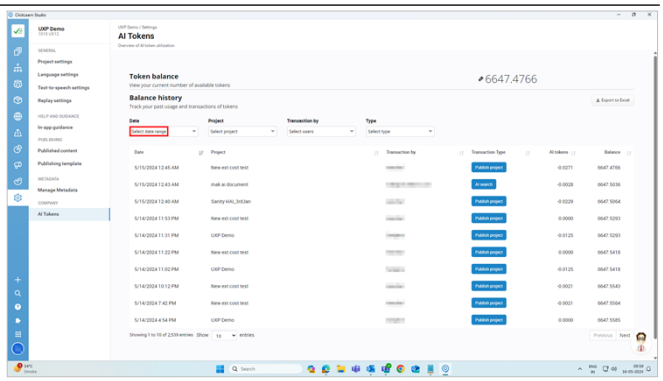
Balance history: This option allows you to track the usage and transactions of tokens.



Export to Excel: This downloads an Excel file that gives you an overview of the tokens. You can use this feature to provide a more detailed explanation of token utilization.

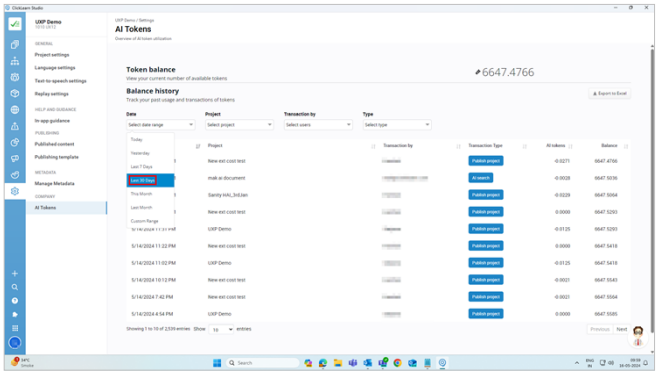


Click on **Select date range**.

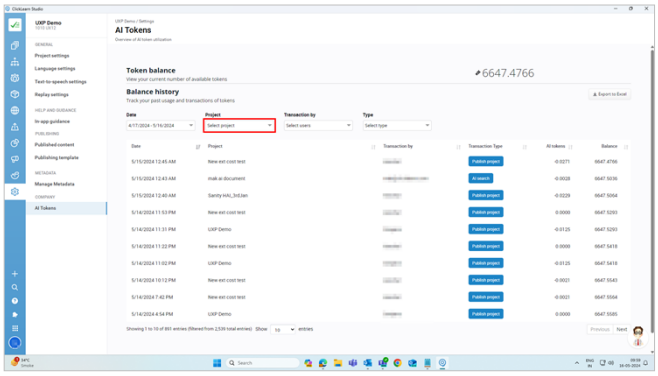


Date Range: This feature presents a drop-down menu from where you can choose a specific date range tailored to your needs.

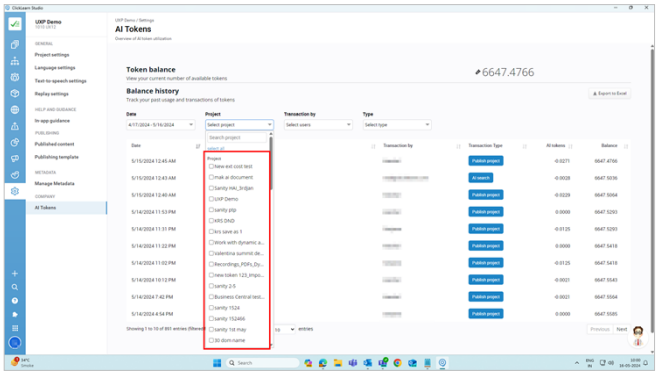
Click on the **Last 30 Days**.



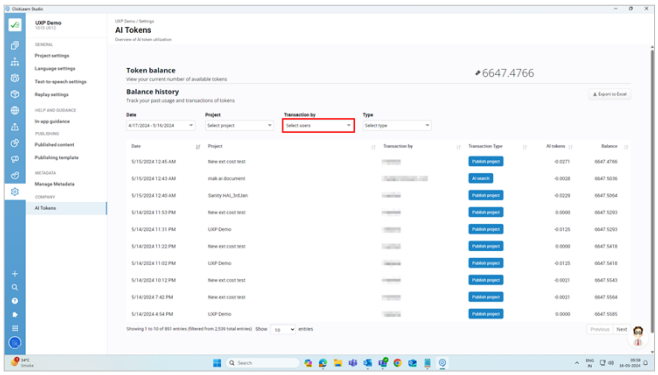
Click on the button **Select project**.



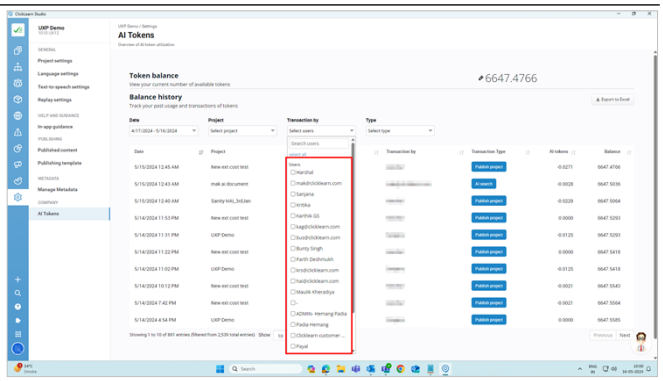
Project: You can filter by the different projects available in the drop-down menu of Select project.



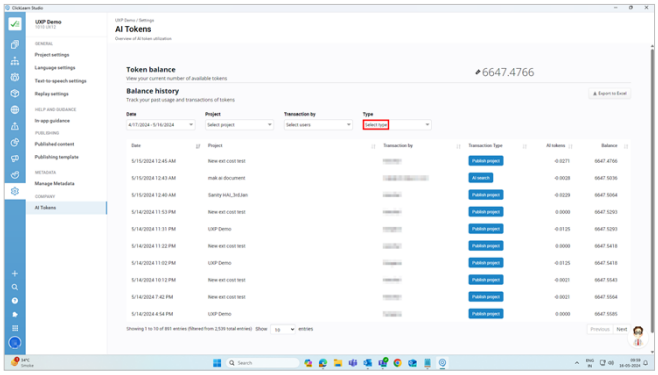
Click on the button **Select users**.



Search users: This displays the list of users associated with that particular account.



Click on **Select type**.

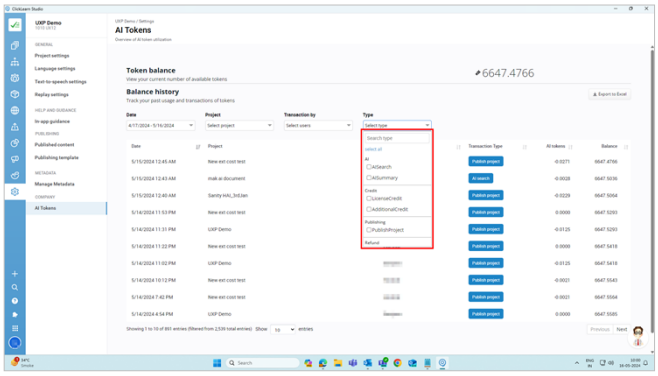


Type: The type filter is categorized into AI, Credit, and Publishing.

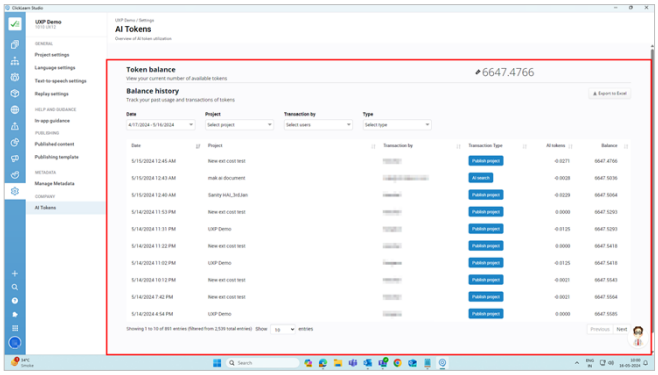
AI: This includes options like **AI Search** and **AI Summary**.

Credit: This encompasses **License Credit** and **Additional Credit**.

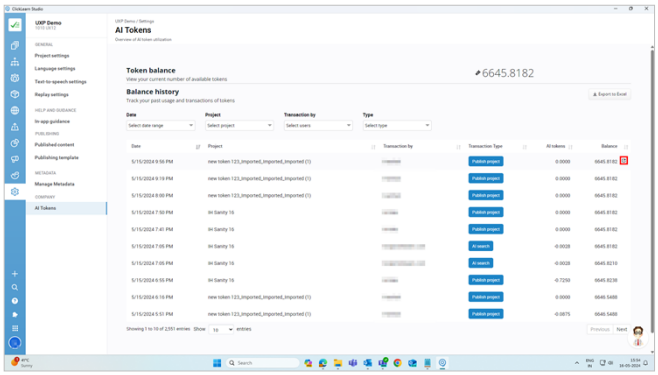
Publishing: This comprises the **Published Project**.



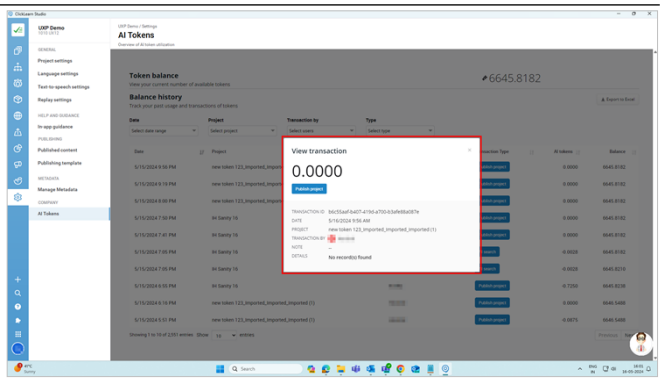
This displays items that are customized to match your selected filters.



Click on the button **View transaction**.



This describes the category in which the token is utilized, the transaction ID, the date, the project, the user name, the note, and the details.



15. Automated Process Testing

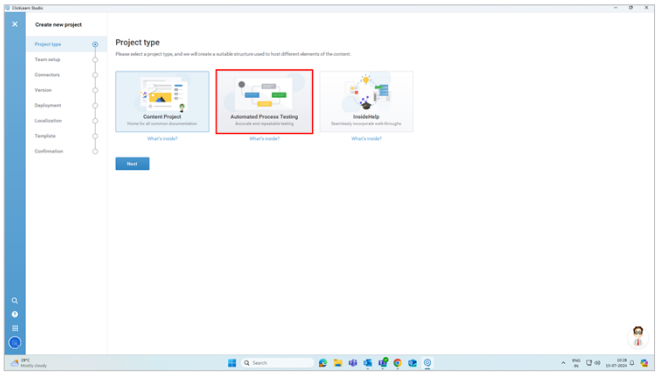
15.1.What is Automated Process Testing

Test your critical processes automatically before rolling out changes, so system upgrades, updated work instructions, and UI changes reach your users only after you've confirmed they still work.

15.1.1. 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.



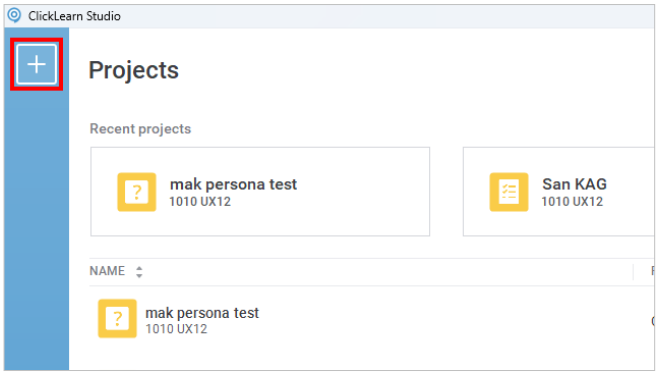
15.1.2. Use of Automated Process Testing

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:

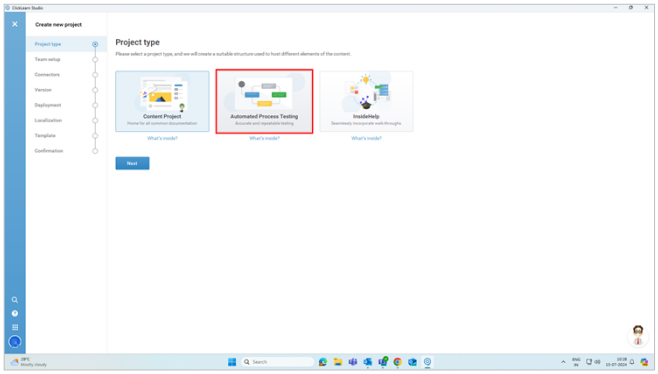
- When you are upgrading or updating your complete business system organization-wide.
- During quality assurance surrounding organizational changes or leading up to a busy season.

15.1.3. Steps to Create an APT Project

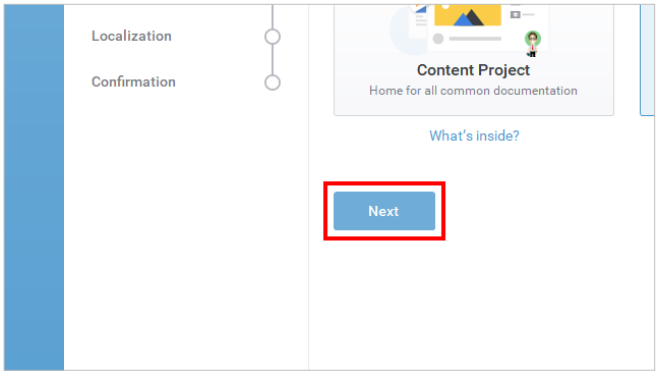
Click on the button **New Project**.



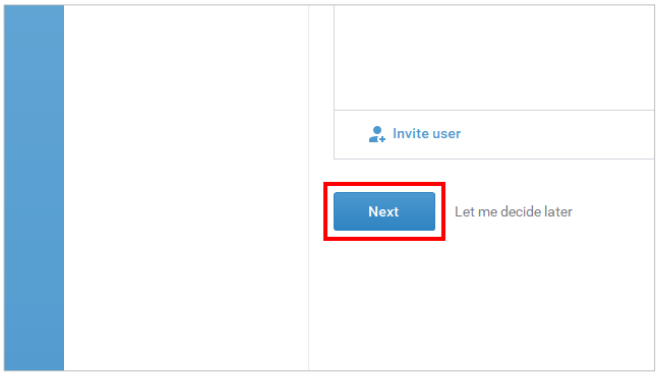
Click on the panel **Automated Process Testing**.



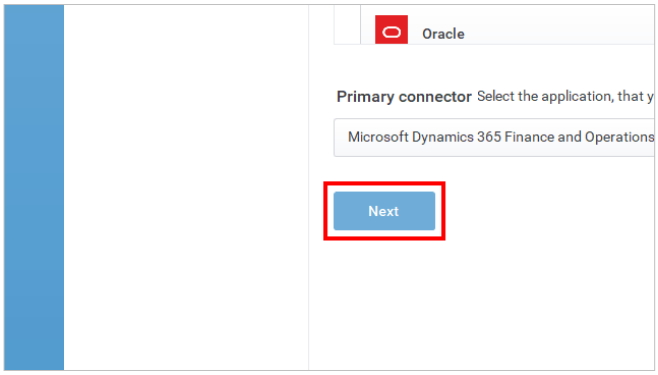
Click on the button **Next**.



Click on the button **Next**.



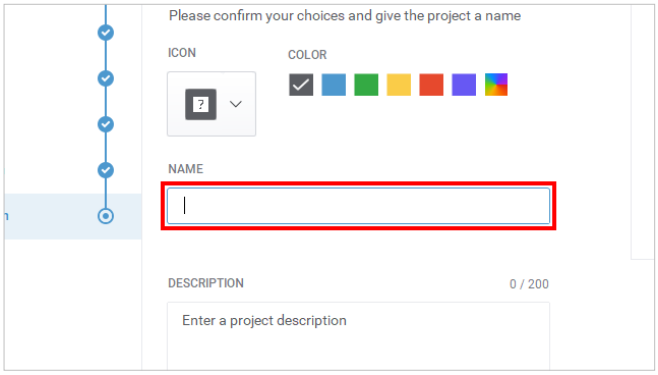
Click on the button **Next**.



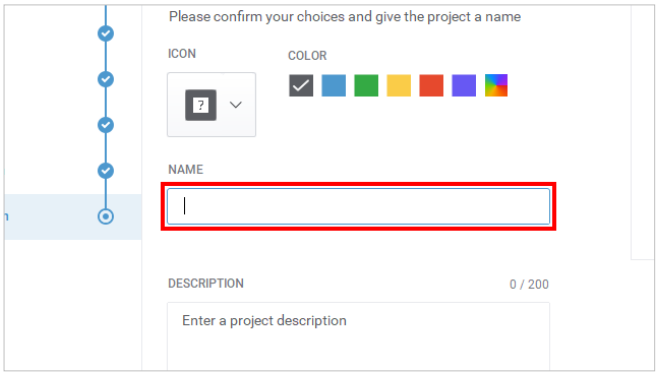
Click on the button **Next**.

Click on the button **Next**.

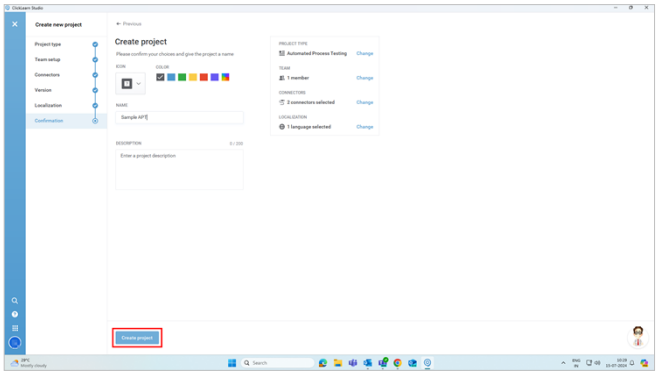
Click on the textbox **Project Name**.



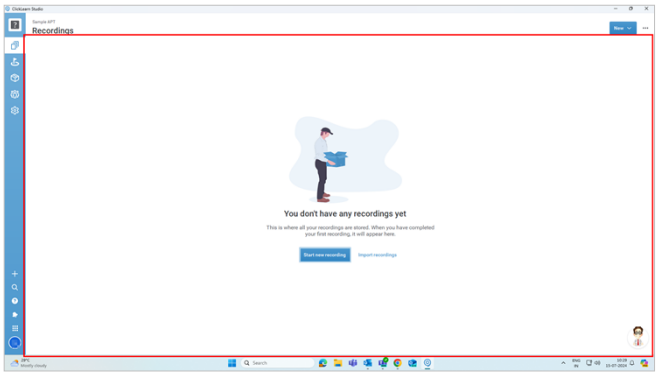
Enter **Project Name**.



Click on the button **Create project**.



This is what an APT project looks like.



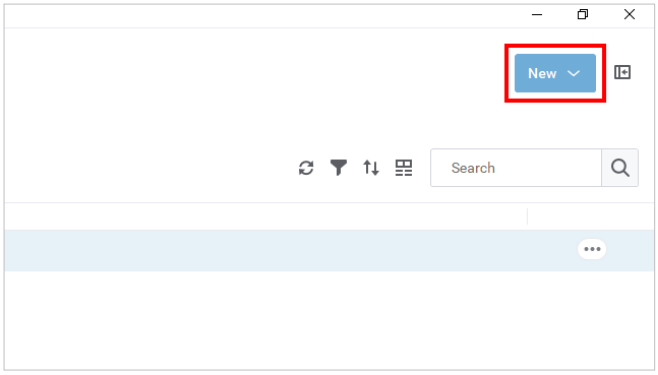
15.2.Build a Test

15.2.1. Context menu of the test

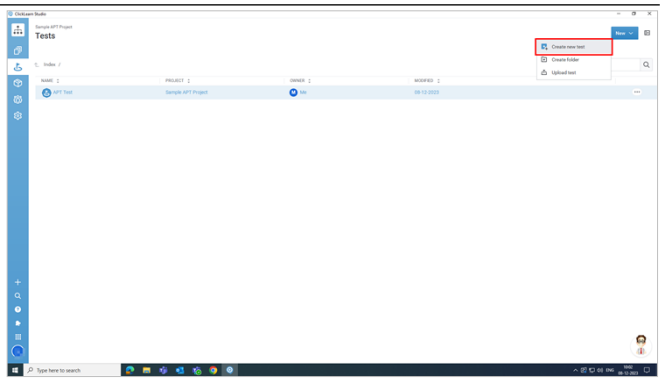
Create, run, and manage tests effortlessly from one context menu, with quick options to edit, move, rename, color-code, download, replace, copy, and organize test files.

15.2.1.1. Top Right Corner Elements

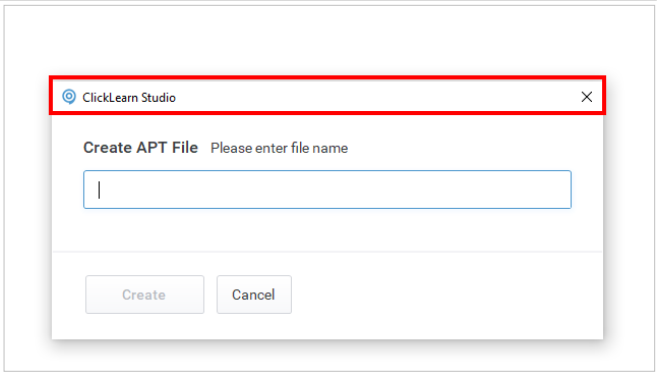
Click on the button **New**.



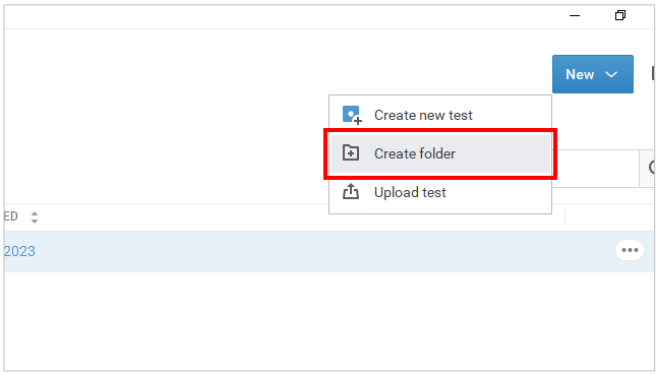
Create a new test: This option allows you to **create a new test**.



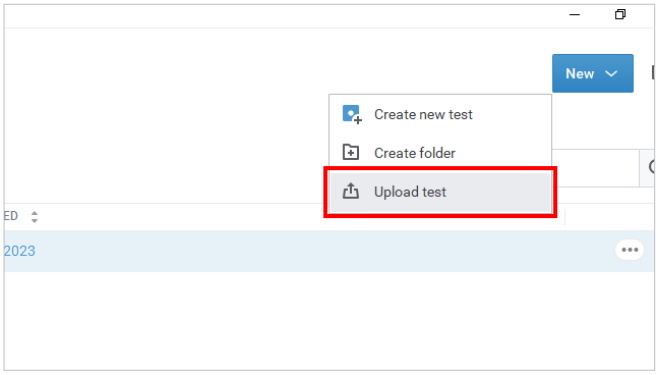
Creating a new test opens up a window where you can name the APT file.



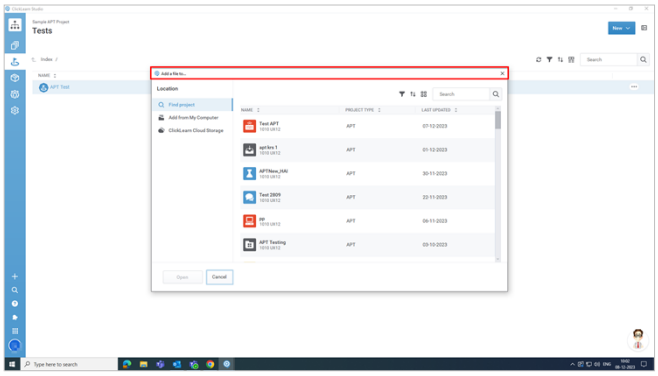
Create folder: This option allows you to **create a folder**.



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.

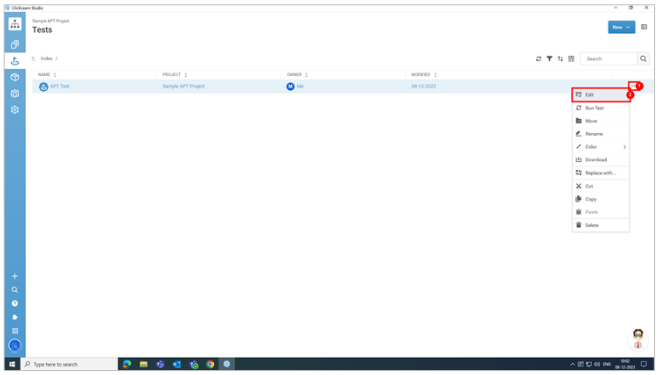


15.2.1.2. Other Elements

15.2.1.2.1. Edit

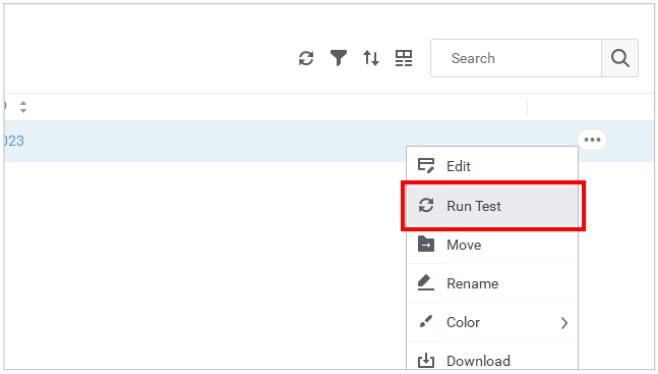
Edit

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



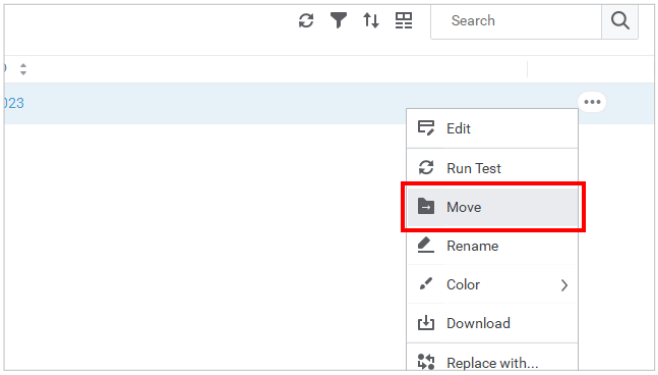
15.2.1.2.2. Run Test

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



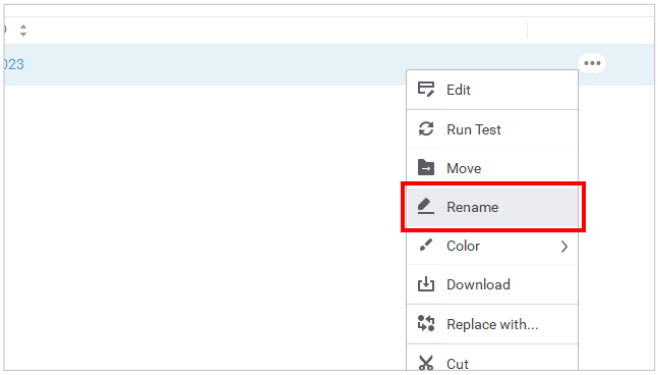
15.2.1.2.3. Move

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



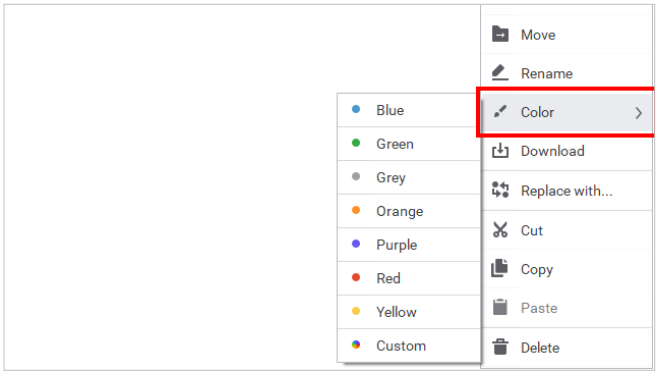
15.2.1.2.4. Rename

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



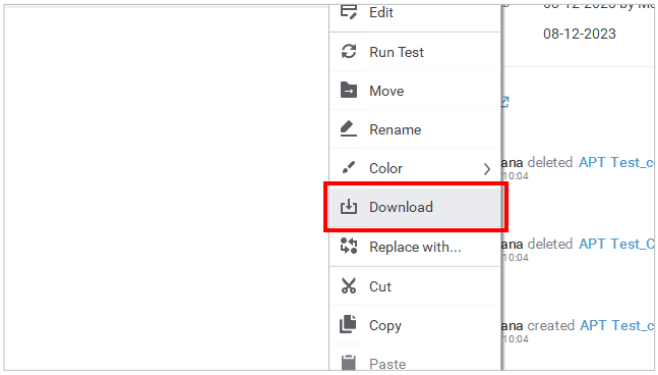
15.2.1.2.5. Color

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



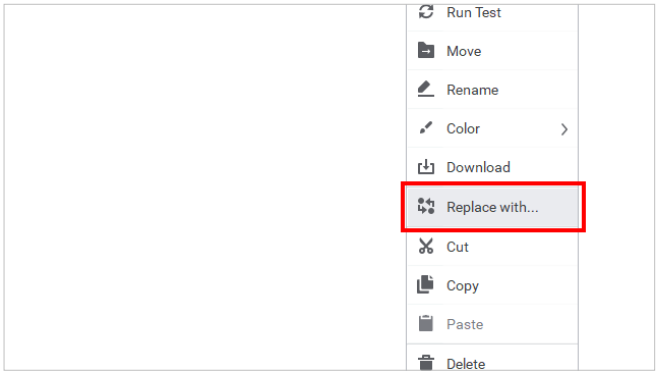
15.2.1.2.6. Download

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

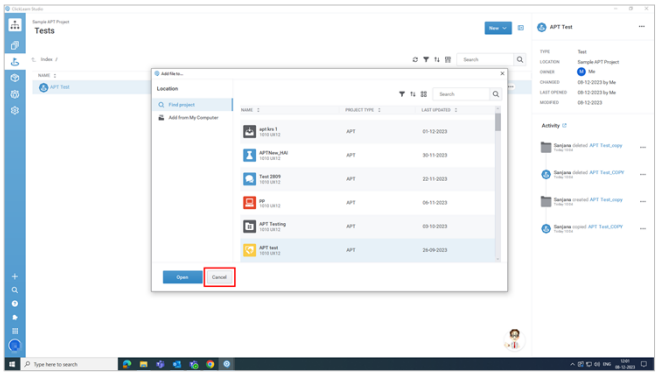


15.2.1.2.7. Replace with

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**.



15.2.1.2.8. Cut

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

15.2.1.2.9. Copy

Copy: You can copy the recording you have selected.

15.2.1.2.10. Paste

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

15.2.1.2.11. Delete

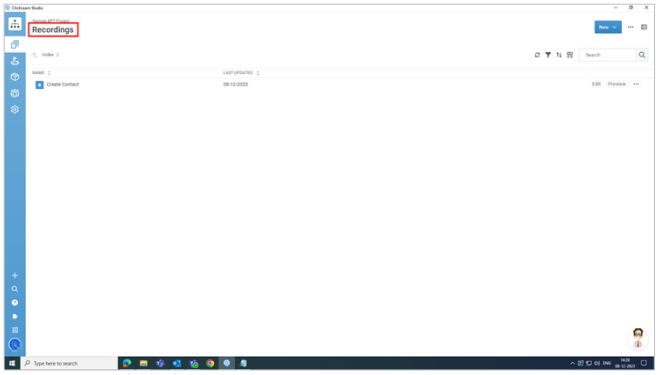
Delete: This function will delete the selected recording.

15.2.2. Create a test and use objects in the test

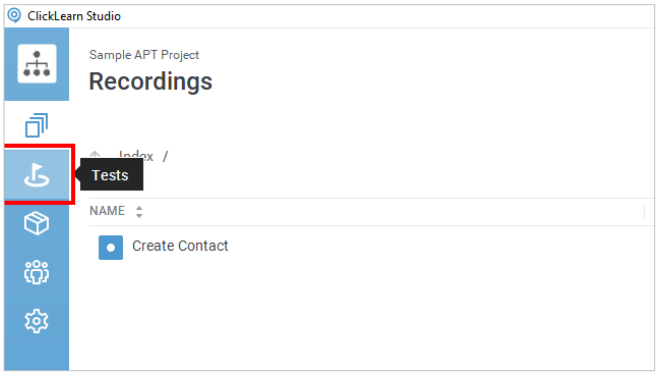
Build automated process tests visually by combining recordings, variables, conditional forks, iterations, assertions, and delays, ensuring business processes run reliably with less manual effort.

15.2.2.1. 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.



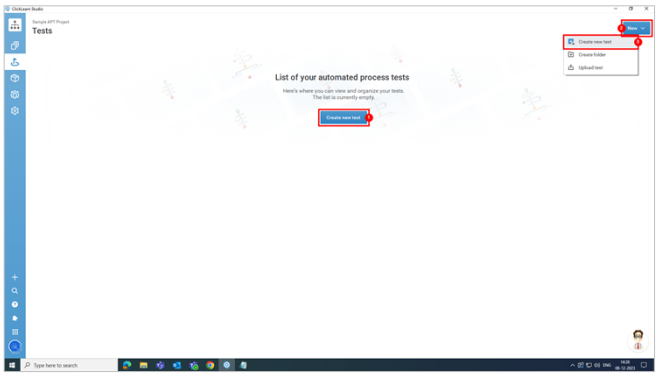
Click on the button **Tests**.



15.2.2.1.1. Create a new test.

Create new test

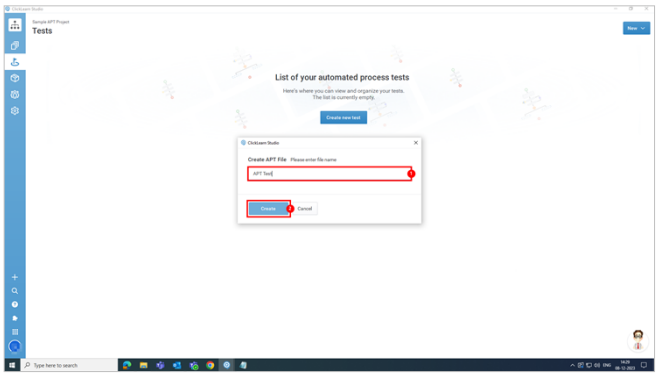
1. There are two ways in which you can create a new test. Click on the button **Create new test**.
2. Another way to add a new test is to click the **New button**.
3. Click on the menu item **Create new test**.



15.2.2.1.2. Create APT File

Create APT File

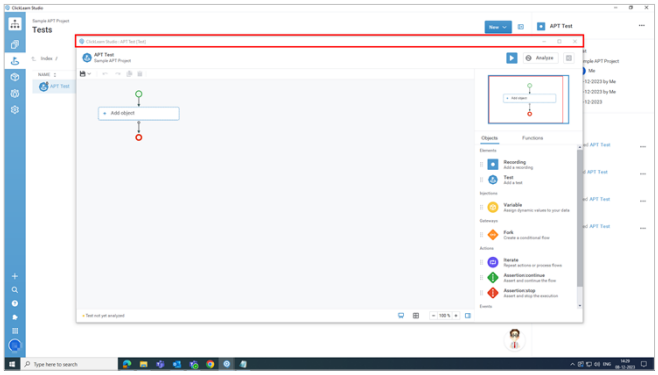
1. Click on the **textbox** and enter the name for the APT file.
2. Click on the button **Create**.



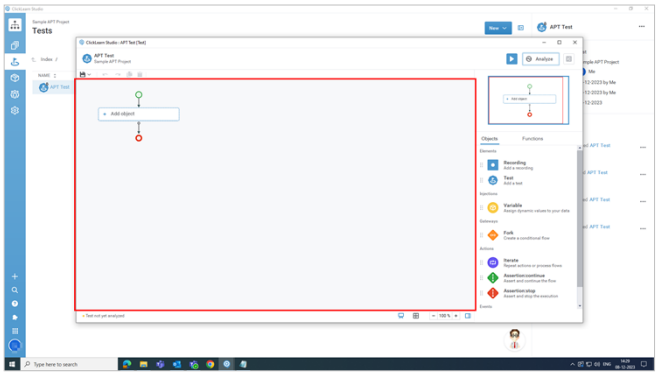
15.2.2.1.3. Process View

15.2.2.1.3.1. 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.



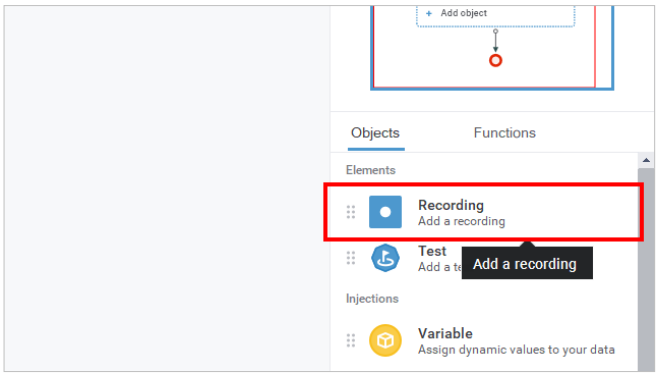
To use the objects, drag and drop them into the **test panel**.



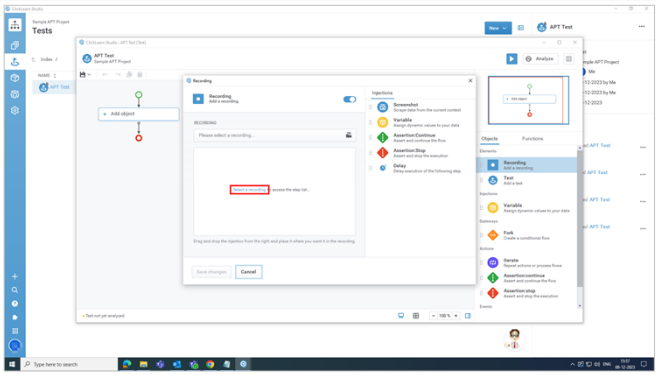
15.2.2.1.4. Elements

15.2.2.1.4.1. Recording

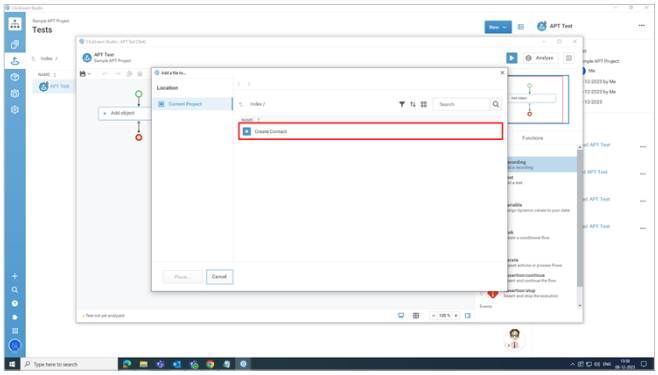
Recording: This is used to add a recording to your test. Click on the **node Recording**.



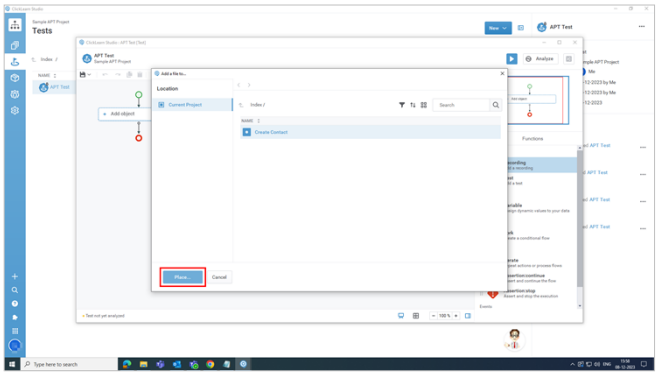
From the panel, click on the label **Select a recording**.



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

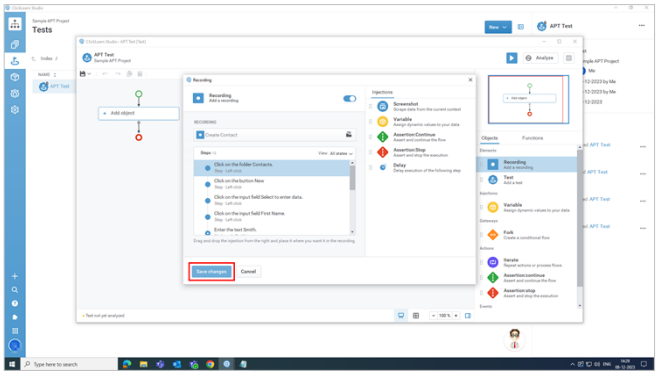


Click on the button **Place**.



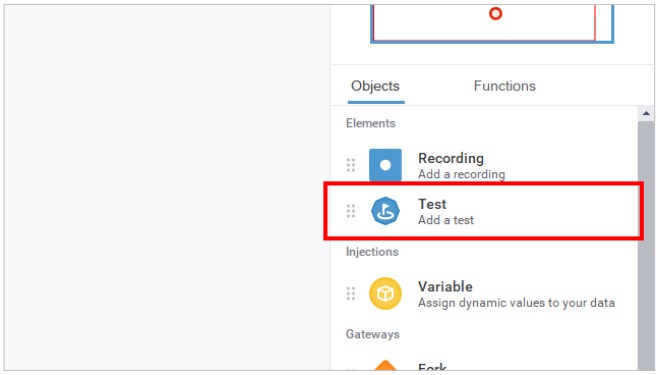
Click on the button **Save changes**.

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.

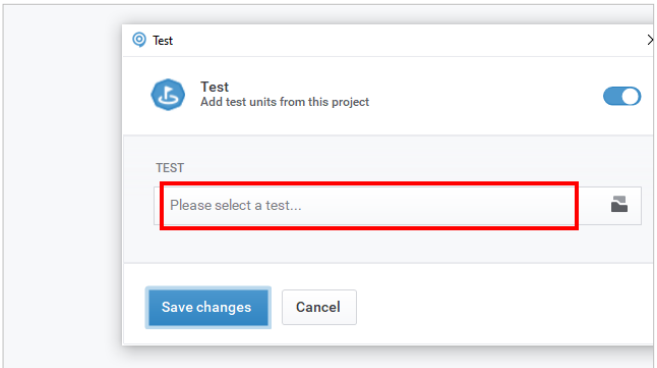


15.2.2.1.4.2. Test

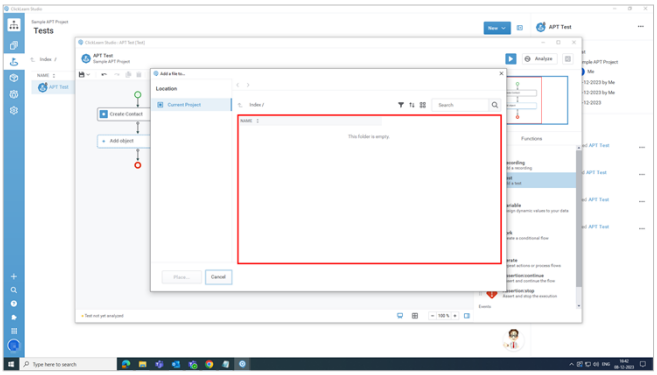
Test: This is used to add an existing test from your project. Click on the **node Test**.



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



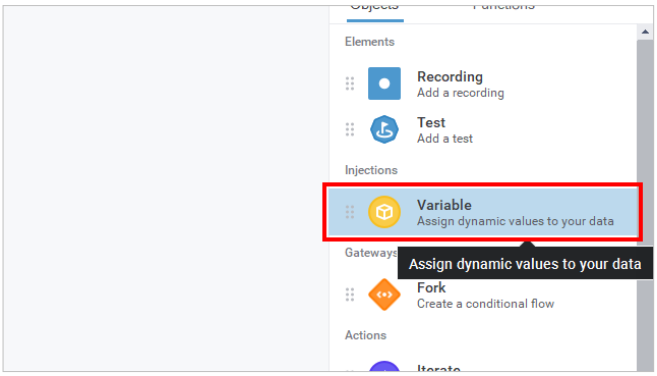
You can select the existing tests from the dialog box that opens up. If you already have the test in that particular project, select the file and click on Place.



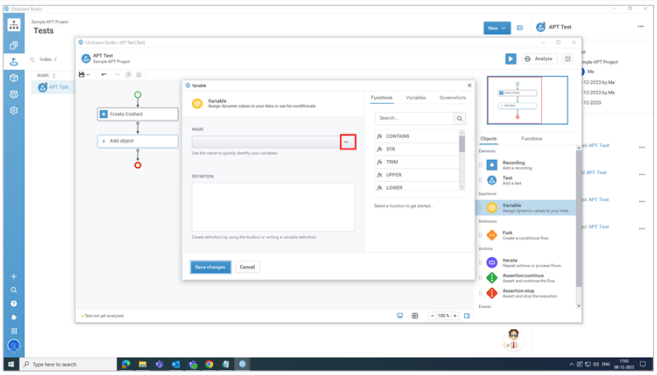
15.2.2.1.5. Injections

15.2.2.1.5.1. Variable

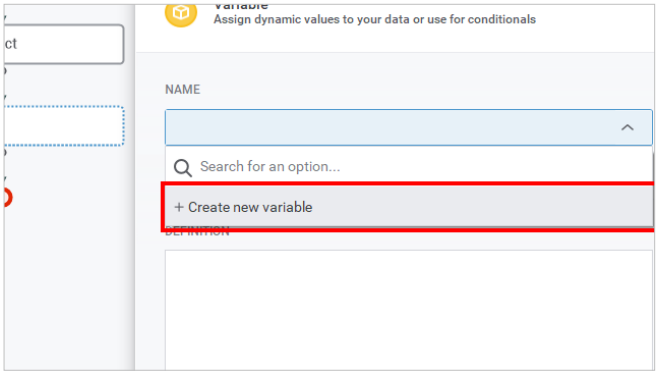
Variable: You can assign dynamic values to your data.



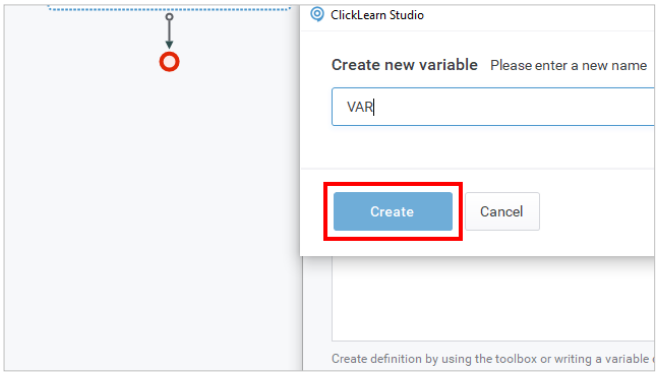
Click on the **dropdown button for the Variable Name**.



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

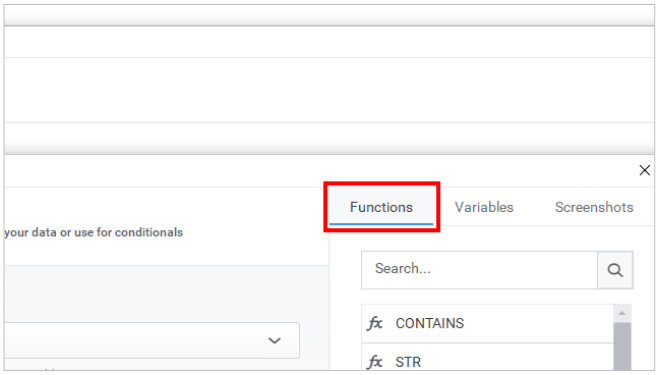


Click on the textbox, enter the variable's name, and click the **Create** button.

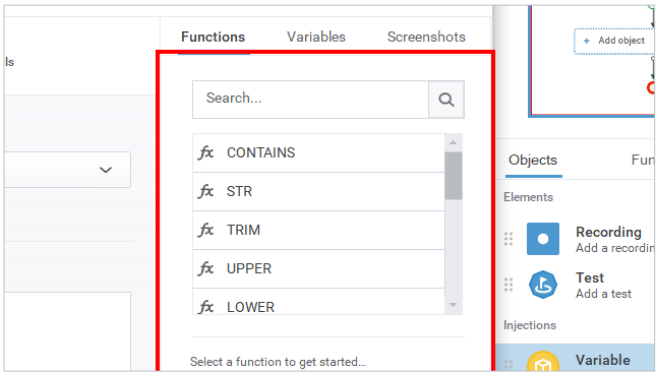


There are three other options, namely Functions, Variables, and Screenshots.

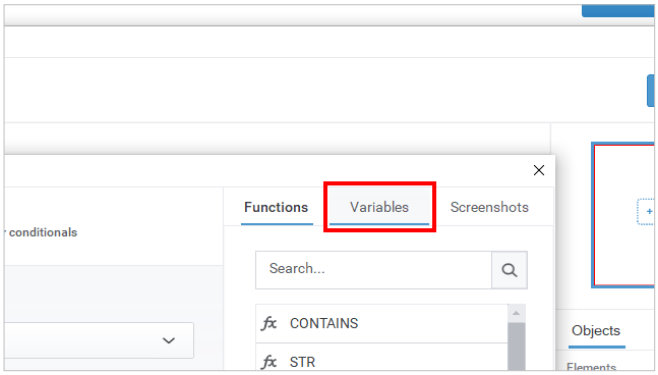
Click on the **tab item Functions**.



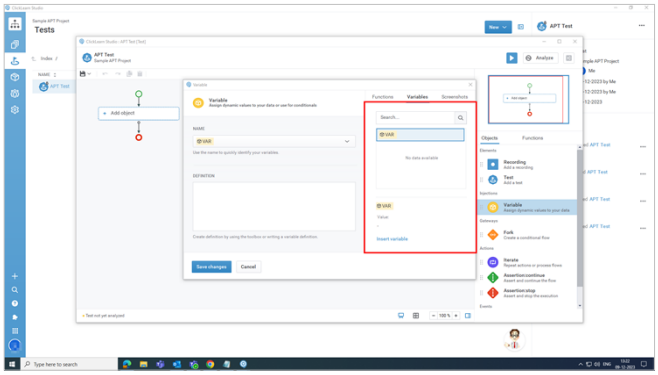
This displays the list of functions you can use along with variables.



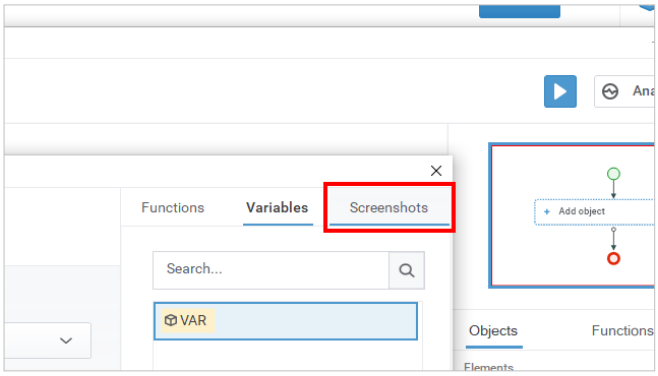
Click on the **tab item Variables**.



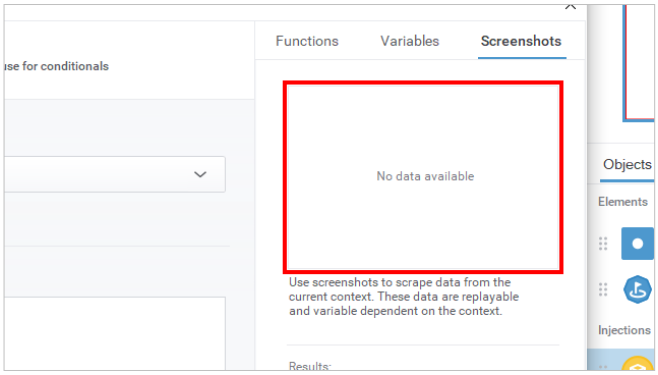
It will display the variables that you have created.



Click on the **tab item Screenshots**.



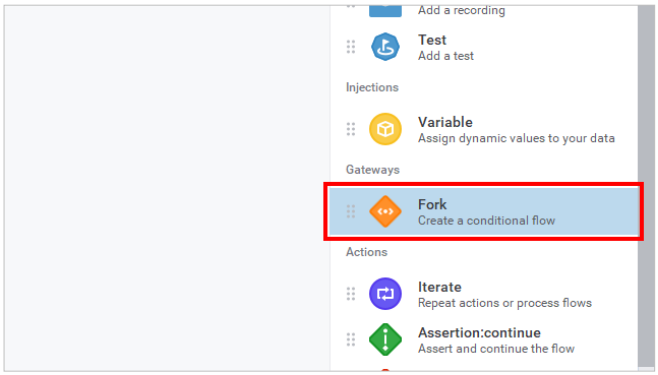
It displays the screenshot you can use to scrape data from the current context.



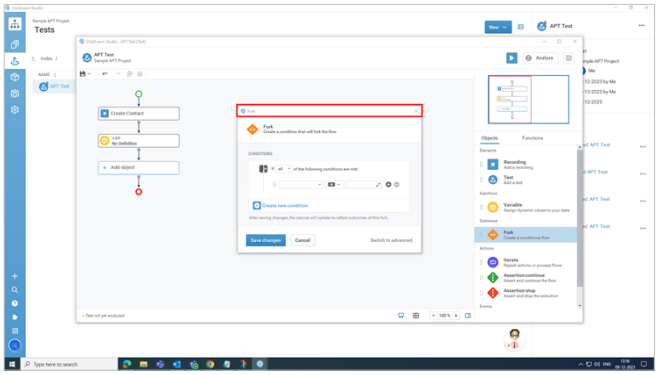
15.2.2.1.6. Gateways

15.2.2.1.6.1. Fork

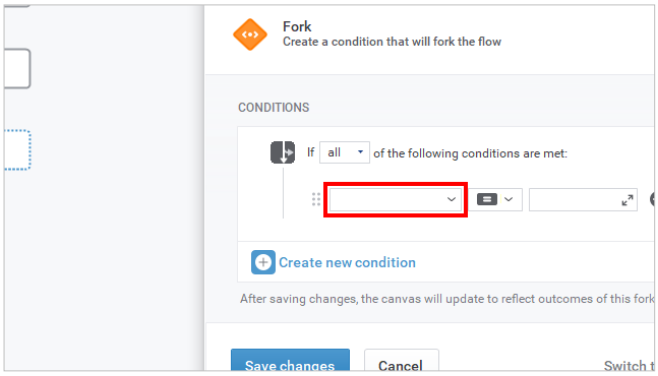
Fork allows you to create a conditional flow for your test. Click on the **node Fork** and drag and drop in the test panel.



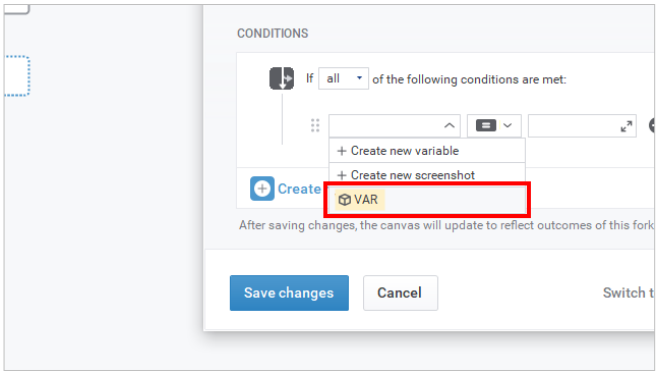
This opens up a new window, allowing you to set test conditions.



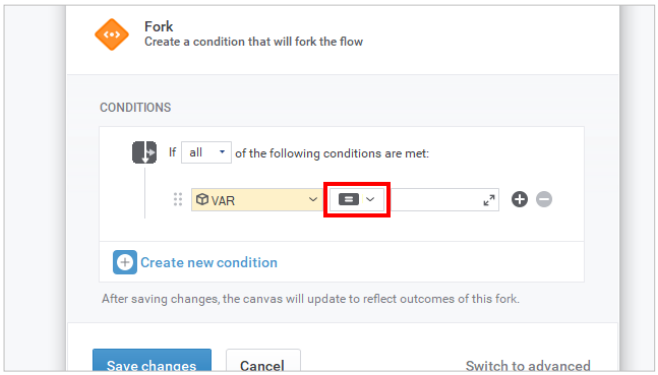
Click on the **dropdown item**.



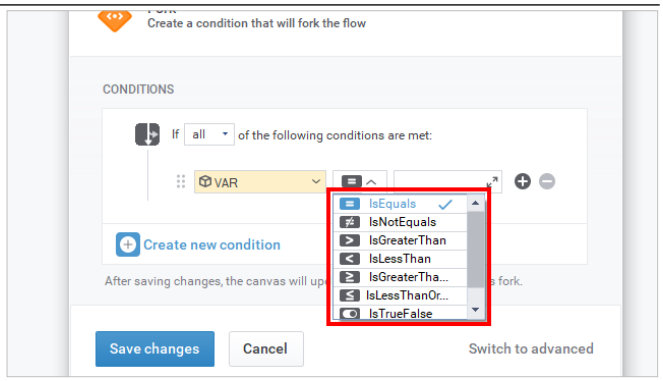
You can create a new variable from here, create a new screenshot, or use the variable you created earlier. Click on the **dropdown item VAR**.



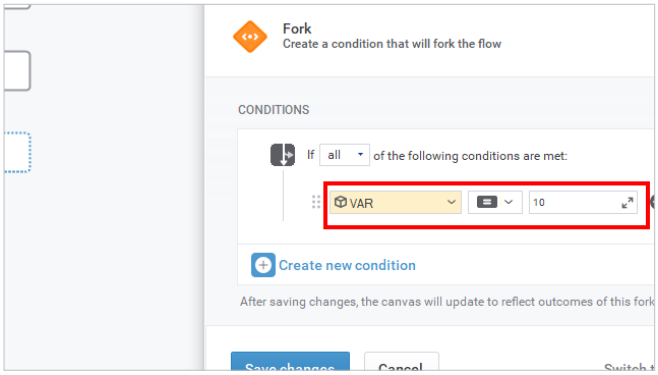
Click on the dropdown item **IsEquals**.



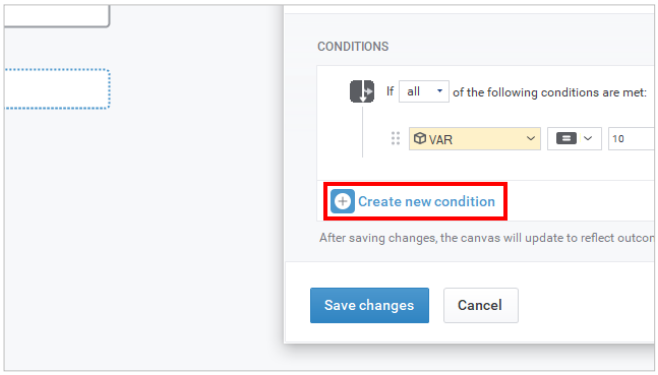
Select an option from the **dropdown** and assign a value to the variable.



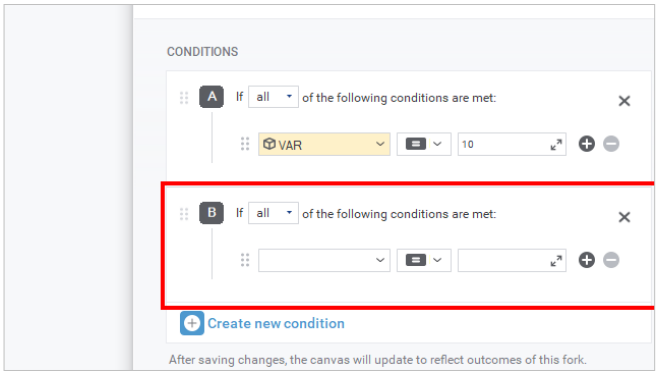
This is what your condition looks like.



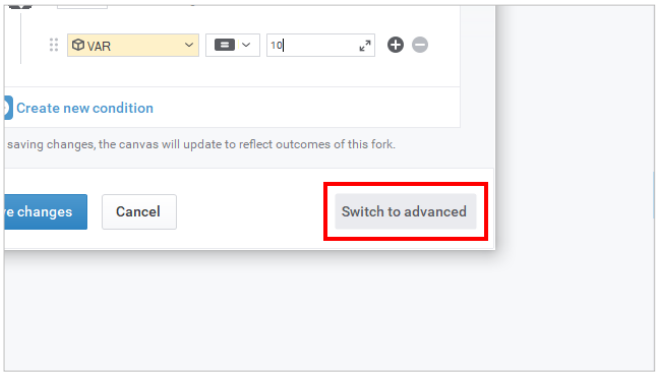
To create another condition, click on the button **Create new condition**.



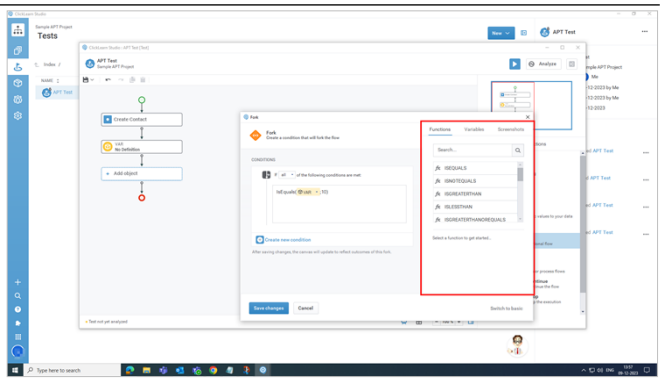
You can add multiple conditions similar to the first condition we have added.



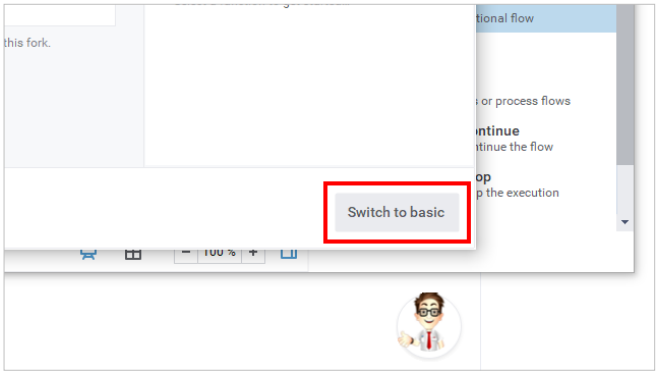
Click on the button **Switch to advanced**.



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



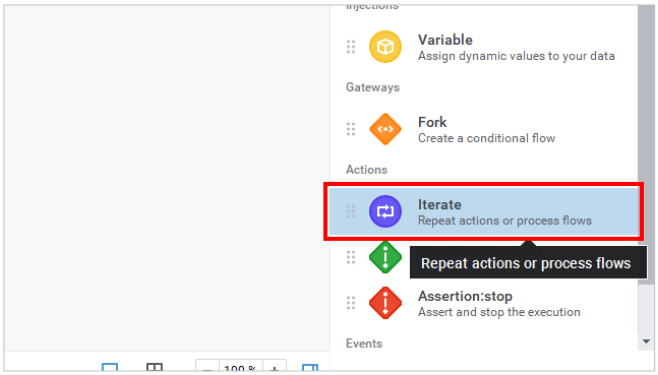
Click on the button **Switch to basic** to switch back to the basic menu.



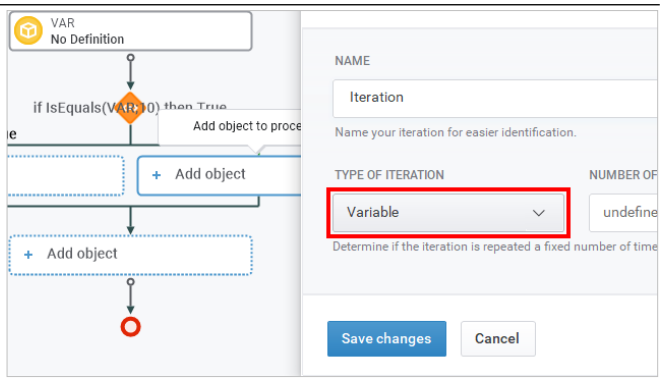
15.2.2.1.7. Actions

15.2.2.1.7.1. Iterate

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



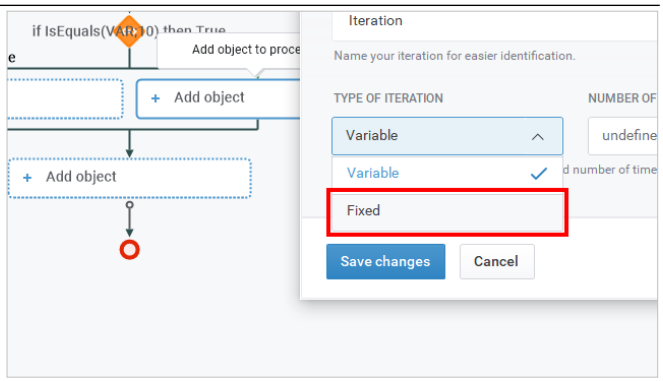
Enter the name of the iteration and click on the **dropdown Type Of Iteration.**



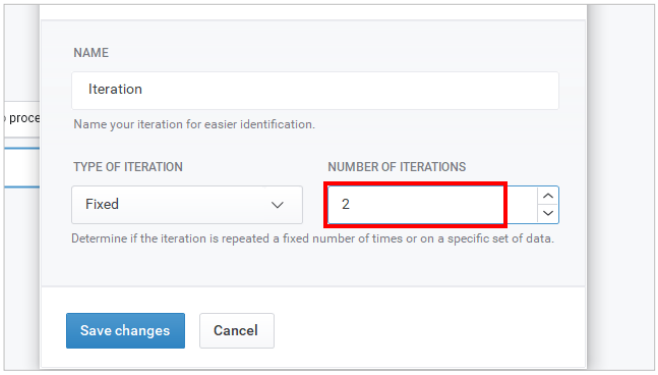
The type of iteration will determine the number of times the iteration is executed.

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

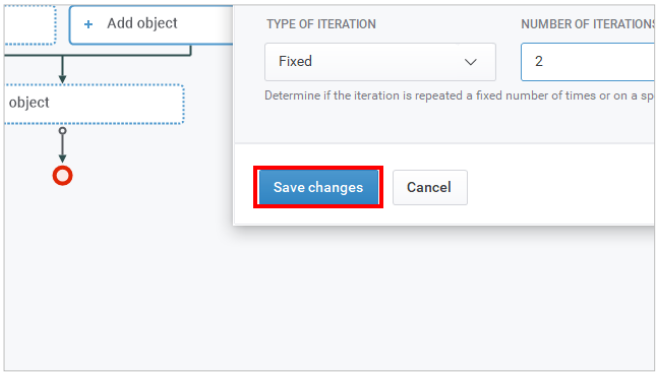
Variable: In the case of variables, the number will be determined based on scenarios or the conditions you added to your process.
Click on the **dropdown item Fixed**.



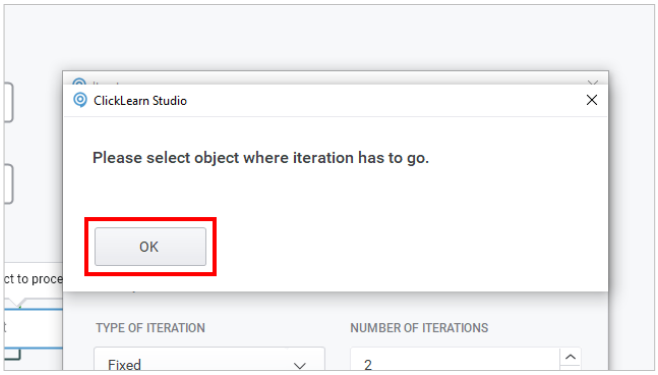
Click on the **input textbox** and enter the value based on your requirement.



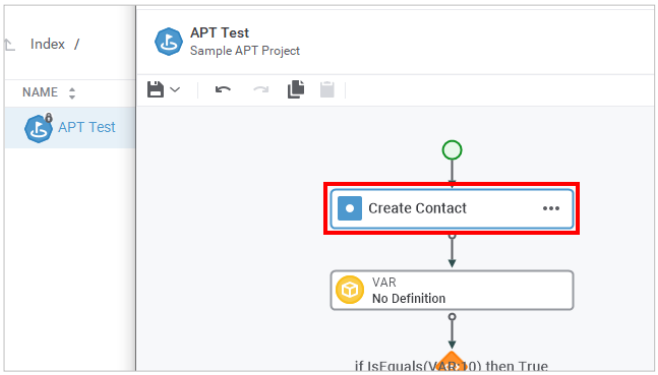
Click on the button **Save changes**.



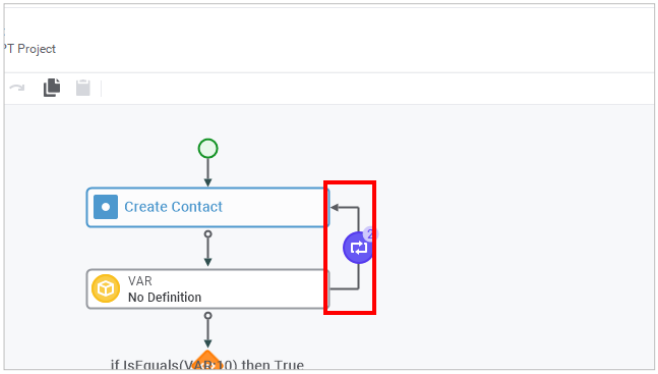
It pops up a new window asking you to select the object where the iteration has to go. Click on the button **OK**.



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

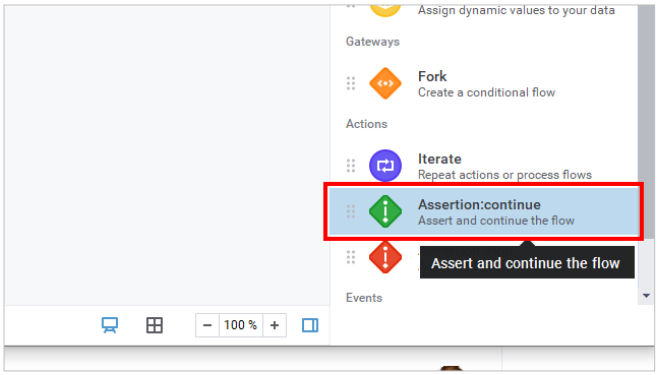


And this is how the iteration shows up.

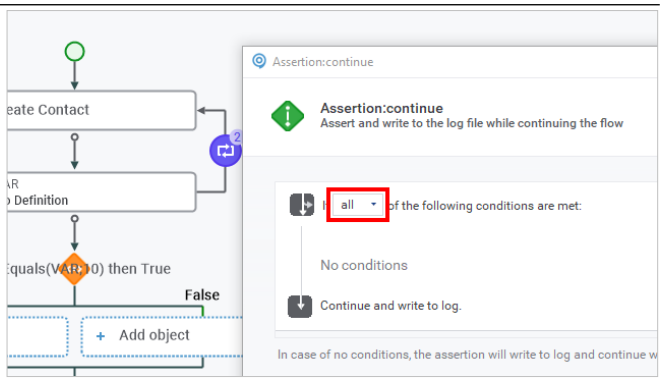


15.2.2.1.7.2. Assertion: continue

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

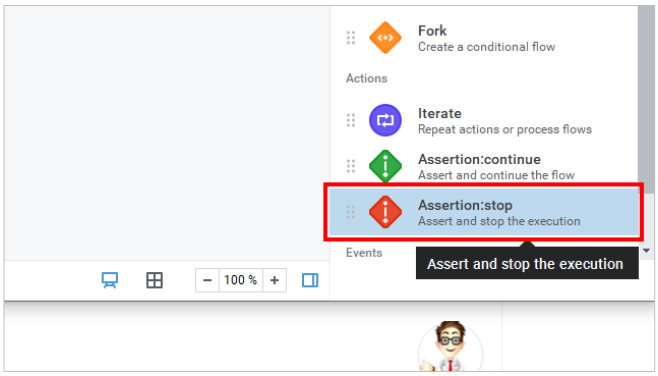


You can add a condition; for example, if all or any conditions are met, the assertion will continue and write to the log file. Click on the **dropdown item all.**

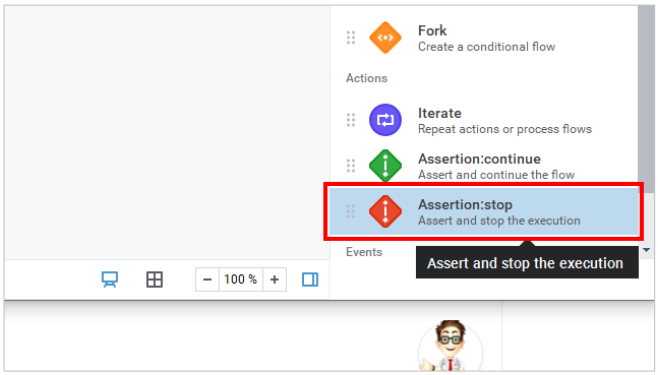


15.2.2.1.7.3. Assertion: stop

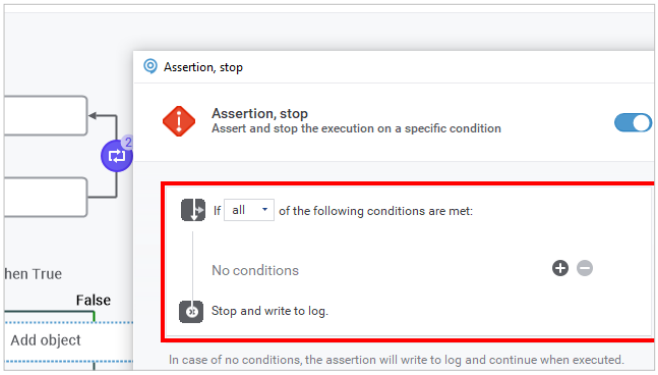
Assertion: stop adds assertion and stops the execution. Click on the node **Assertion: stop.**



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

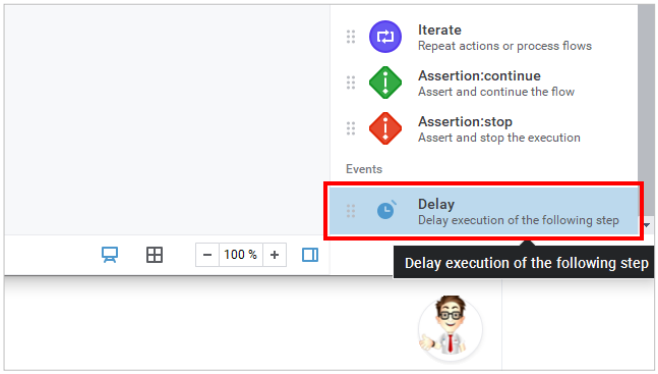


If all or any of the conditions are met, you can add a condition like the assertion will stop and write it to the log file.

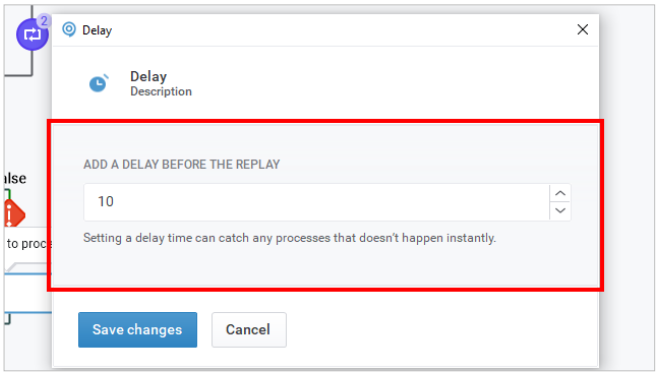


15.2.2.1.7.4. Delay

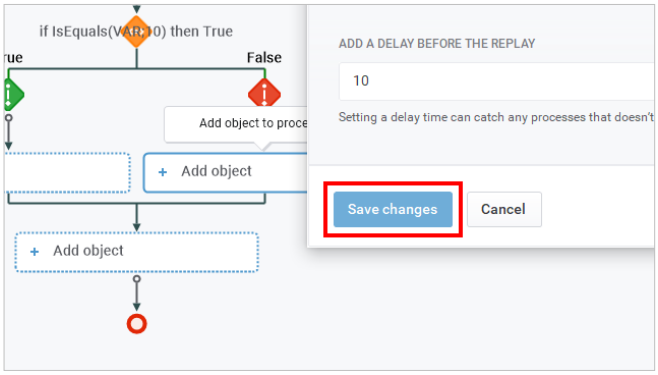
Delay allows you to add a delay of seconds in between your test. Click on the node **Delay**.



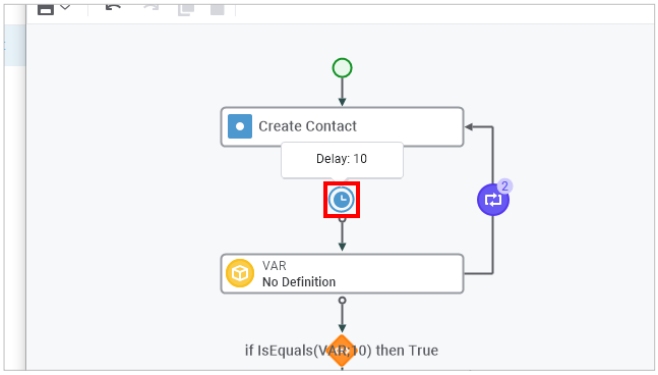
Enter the value based on your requirements.



Click on the button **Save changes**.



This adds a delay of 10 seconds.



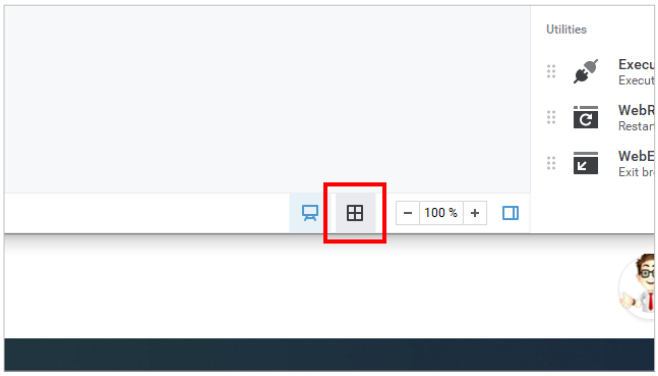
15.3.Add and Assign Test Data

Feed your test cases real data and run them across multiple scenarios, so that a single process gets validated against every variation it will face in production, without building a separate test for each one.

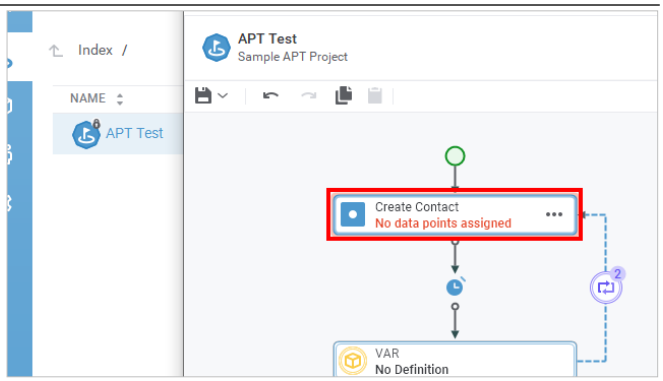
15.3.1. Introduction

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**.

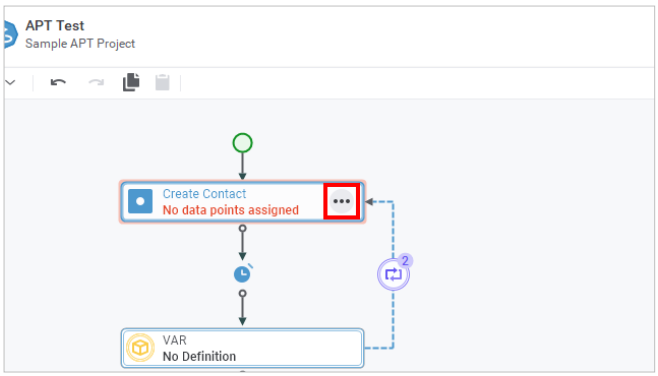


Click on the diagram element **Recording** with the value **Create Contact,** which indicates no data points assigned.



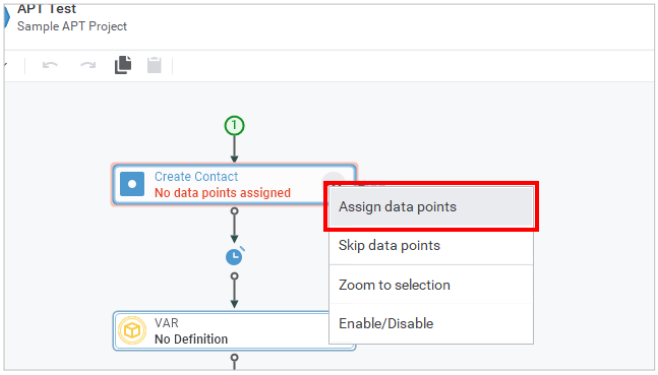
15.3.2. More options associated with data points

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

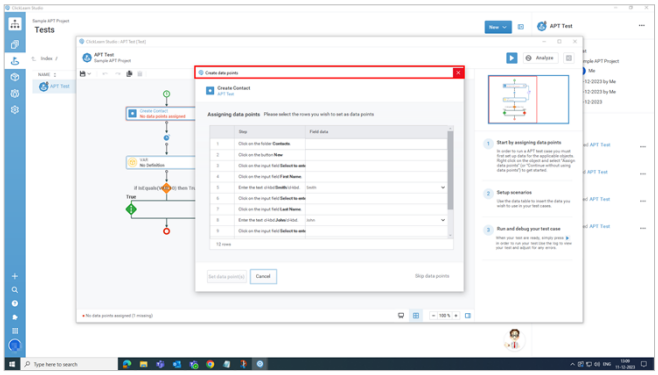


15.3.2.1. Assign data points

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

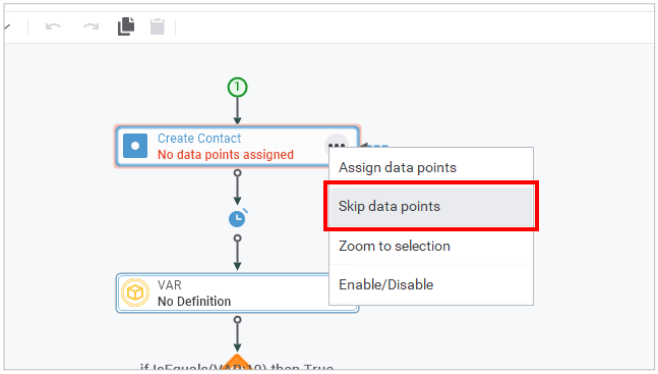


This opens a new window of **Create data points,** which allows you to set data points.

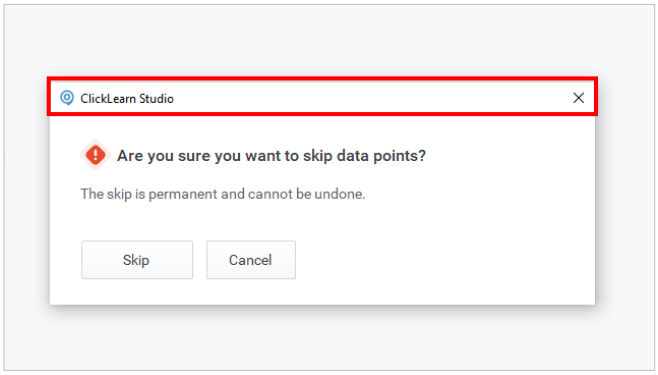


15.3.2.2. Skip data points

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

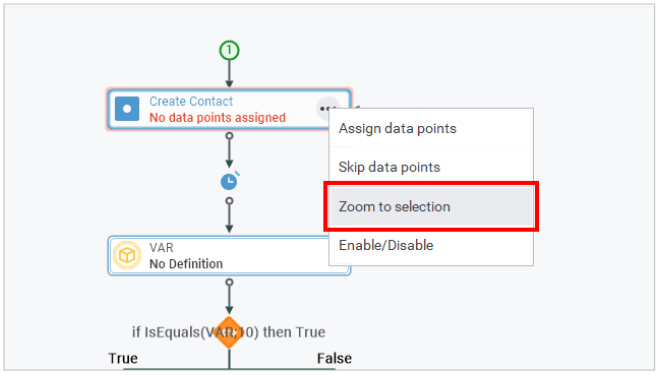


This opens a new window, where you select Skip, which allows you to Skip data points and proceed with the test.



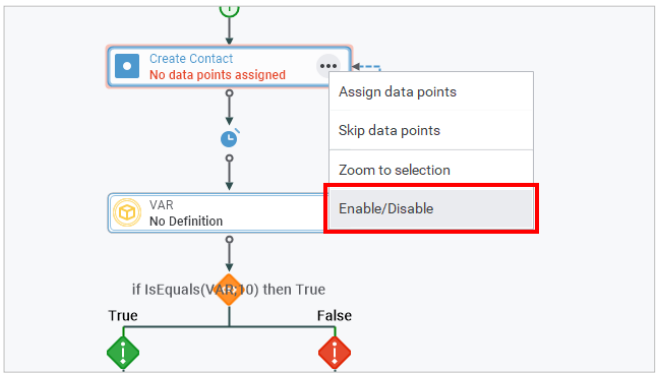
15.3.2.3. Zoom to selection

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



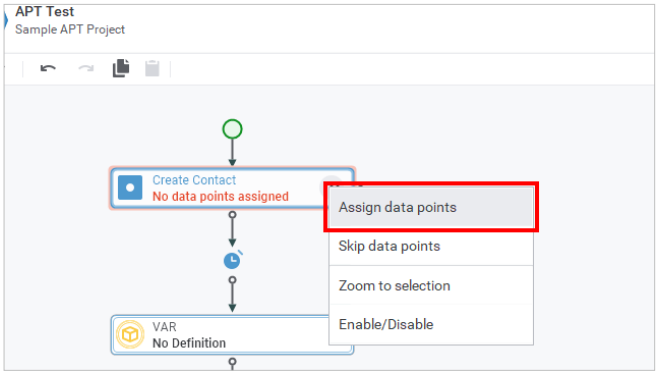
15.3.2.4. Enable/Disable

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.



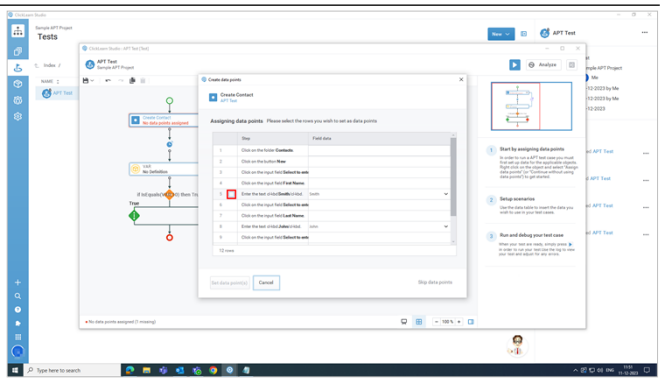
15.3.3. Assigning data points

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

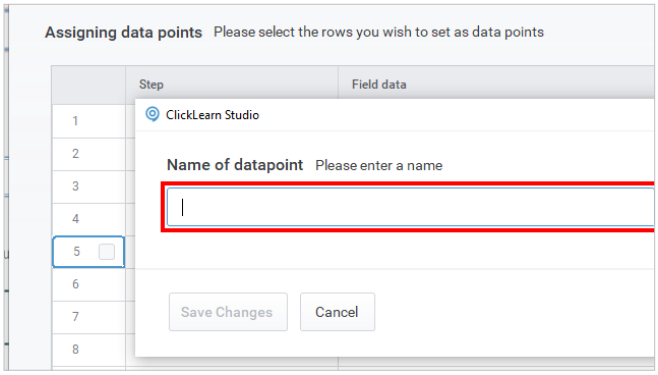


A new window lets you choose the rows you want to use as data points. Click on the checkbox of the grid cell.

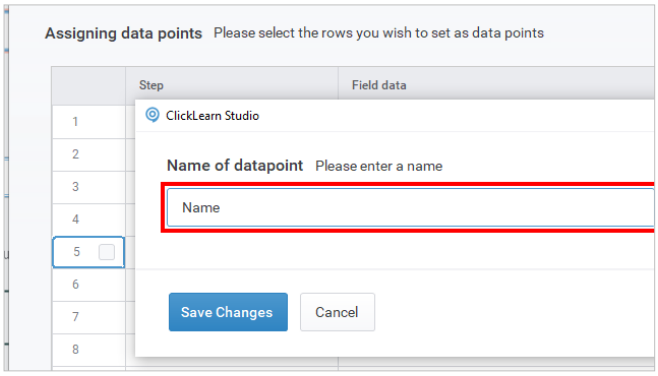
NOTE: You can only assign the data points to the rows which contain a checkbox.



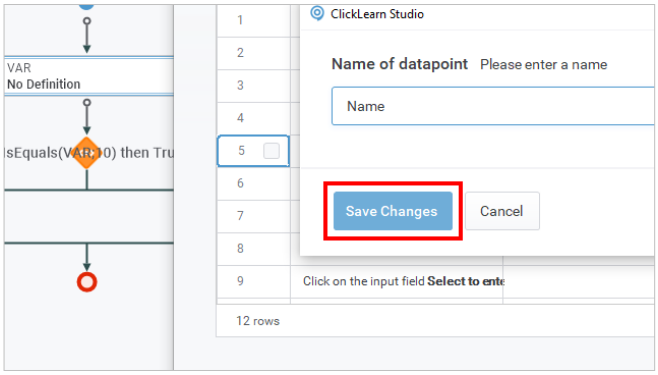
Click on the textbox **Txt Rename**.



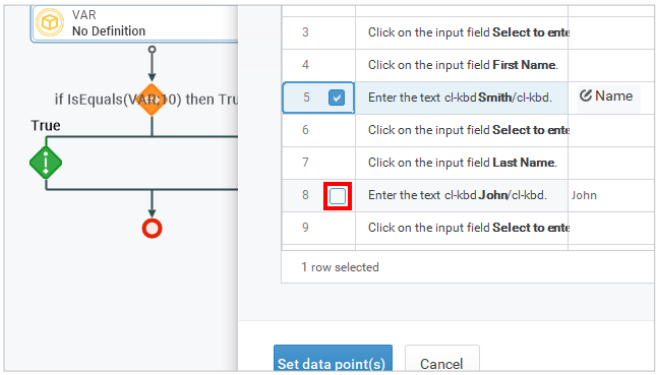
Click on the textbox **Txt Rename** and enter the Name for the data point.



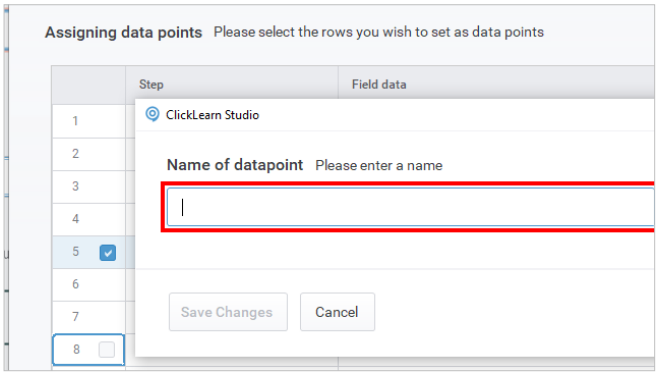
Click on the button **Save Changes**.



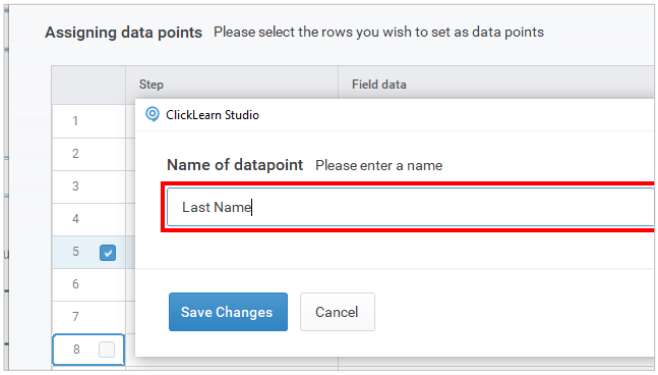
Click on the checkbox of the grid cell.



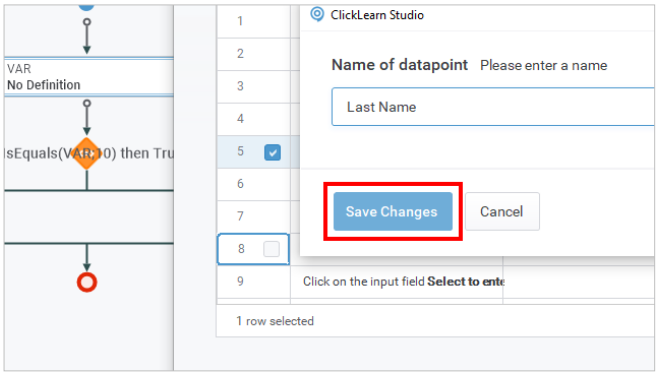
Click on the textbox **Txt Rename**.



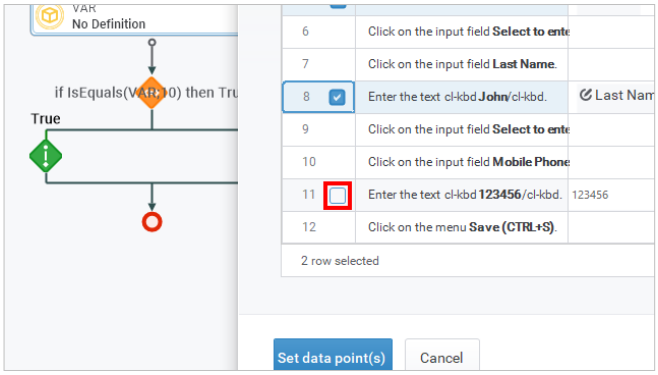
Click on the textbox **Txt Rename** and enter the Name for the data point.



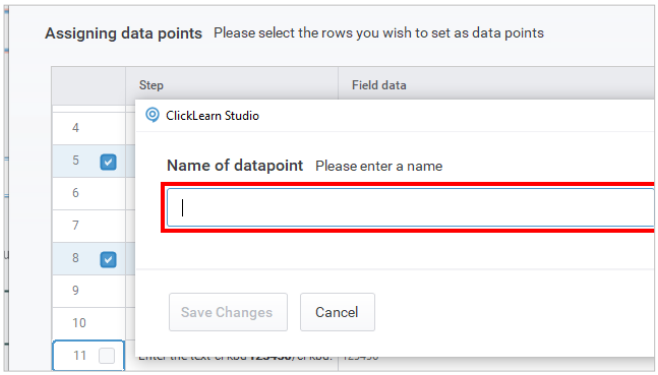
Click on the button **Save Changes**.



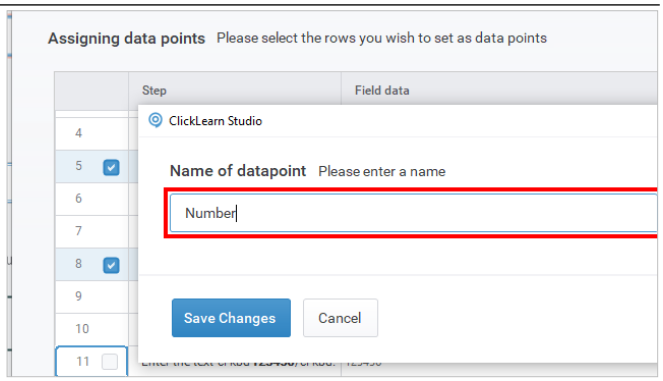
Click on the checkbox of the grid cell.



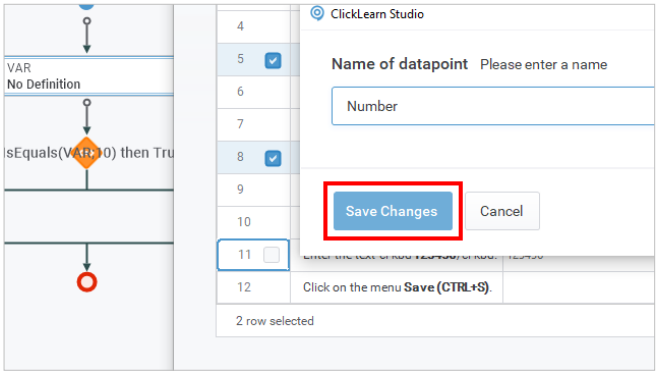
Click on the textbox **Txt Rename**.



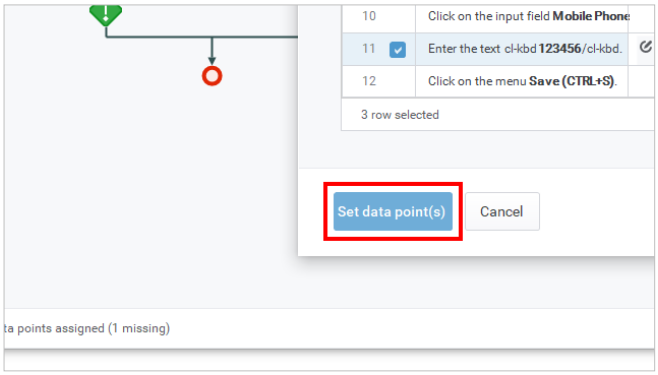
Click on the textbox **Txt Rename** and enter the Name for the data point.



Click on the button **Save Changes**.



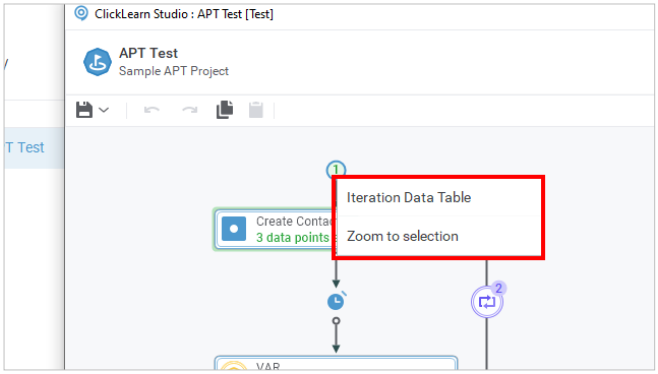
Click on the button **Set data point(s)**.



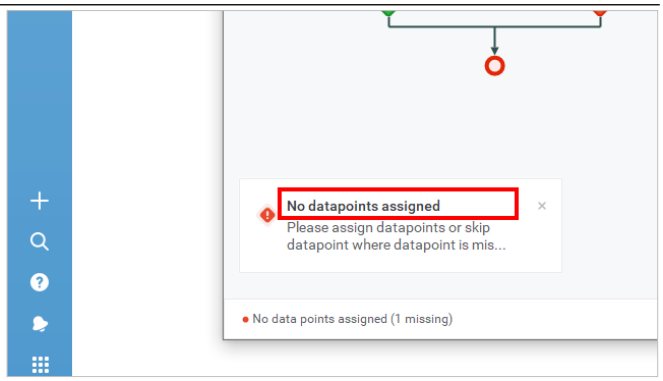
15.3.3.1. Setting up iterations

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

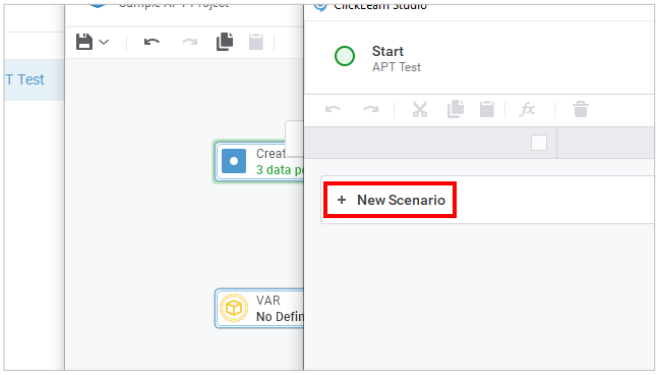
- **Iteration Data Table:** This allows you to add scenarios.
- **Zoom to Selection:** This will zoom in on the data view.



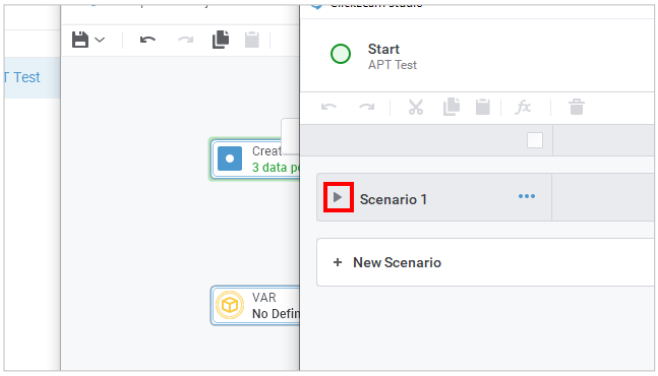
NOTE: Setting or skipping data points is mandatory before starting with iteration. If you have not done the following, it displays a message at the bottom left corner as **No data points assigned**.



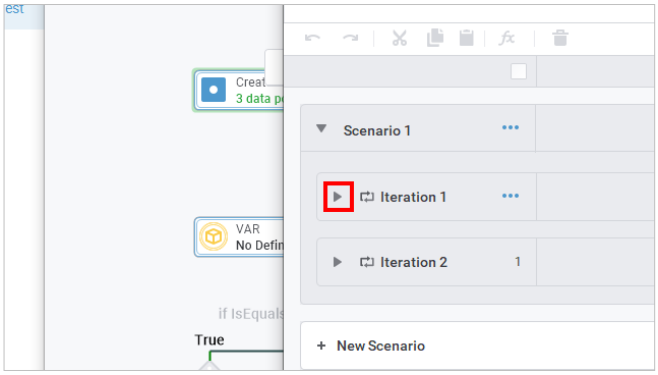
Click on the Iteration Data Table and click on the button **New Scenario**.



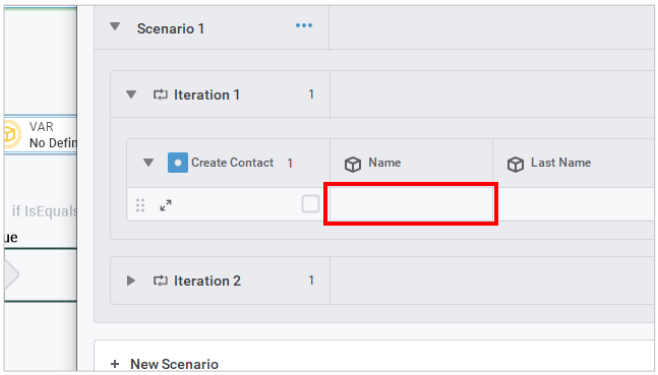
Click on the **Expander** button.



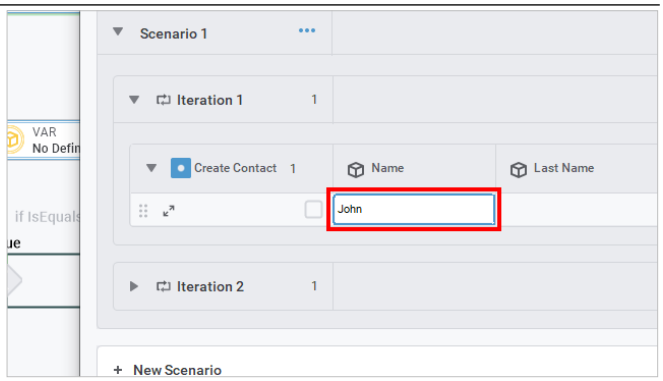
Click on the **Expander** button.



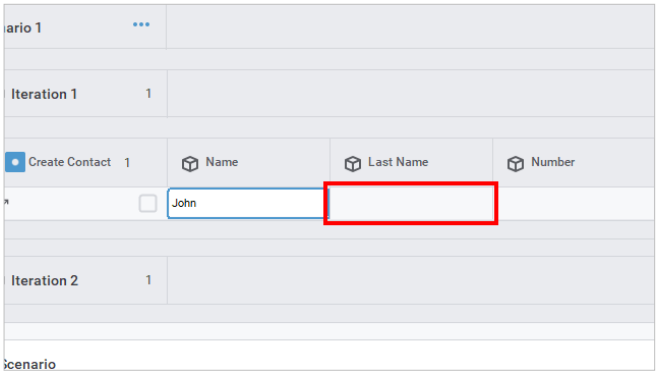
Click on the grid view cell **Name** with data.



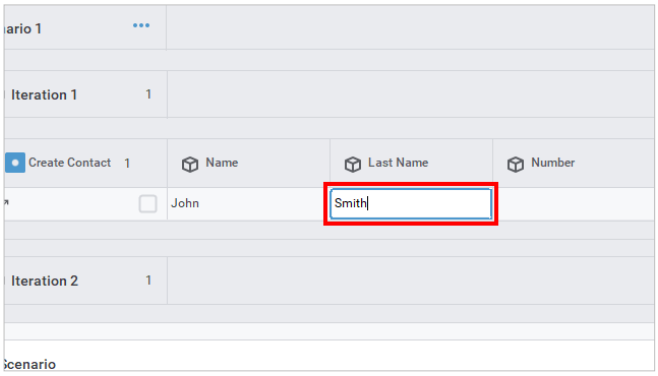
Enter the **Name** based on your requirements.



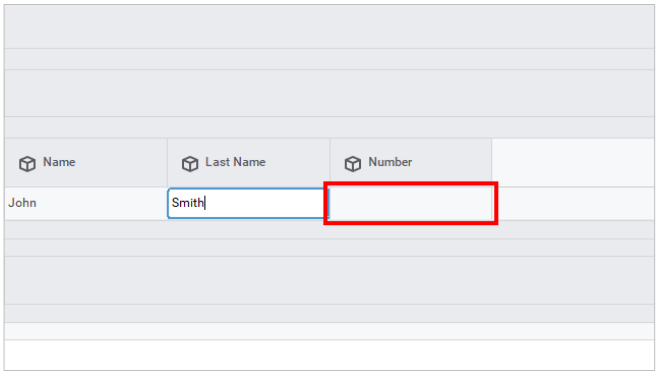
Click on the grid view cell **Last Name** with data.



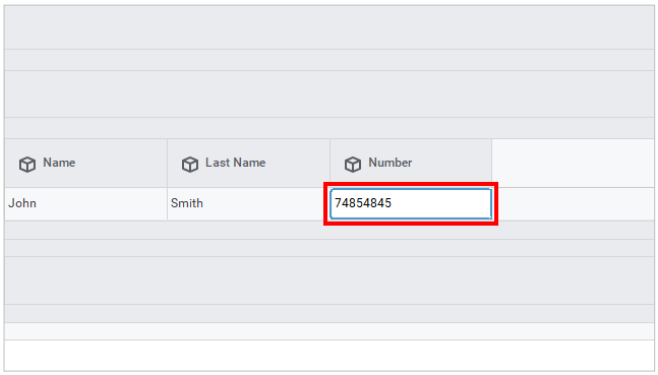
Enter the **Last Name** based on your requirements.



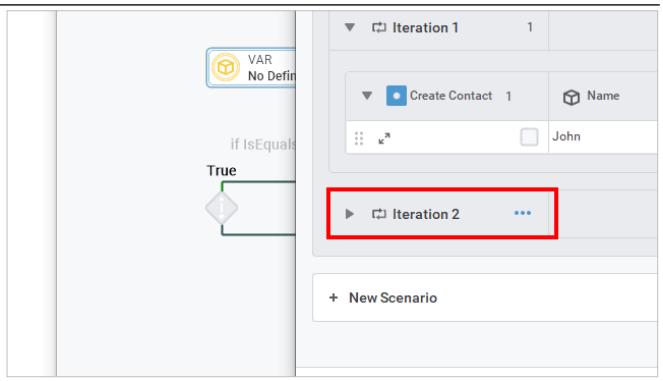
Click on the grid view cell **Number** with data.



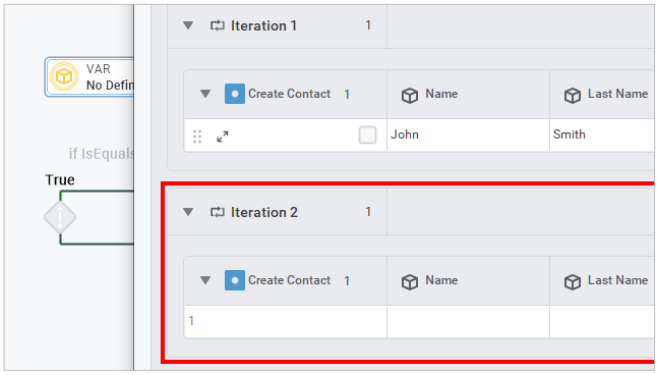
Enter the **Number** based on your requirements.



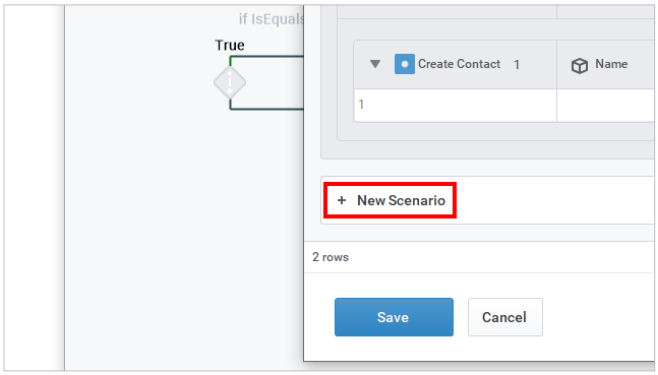
Click on the panel.



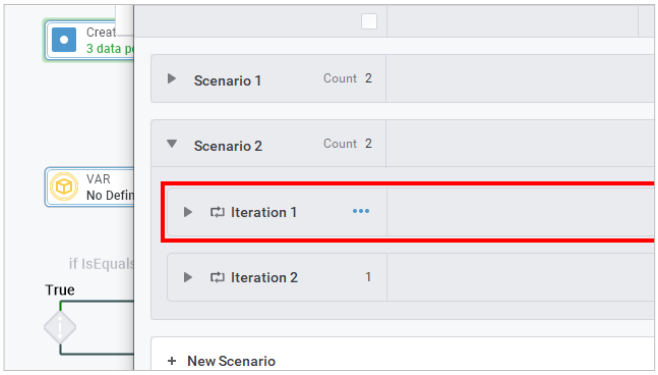
As shown above, you can add more iterations depending on your requirements.



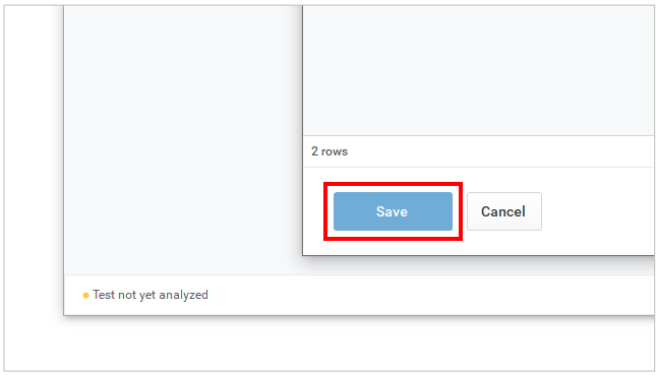
To add a new scenario, click on the button **New Scenario**.



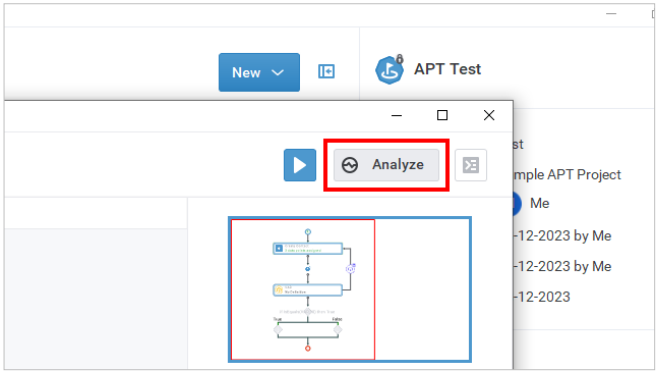
Similarly, you can add iterations for your second scenario.



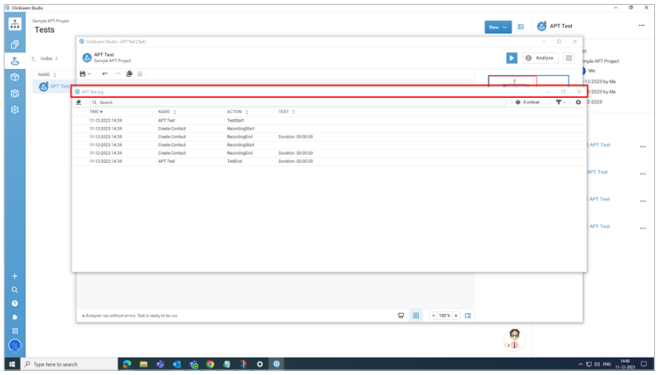
Click on the **Save** button.



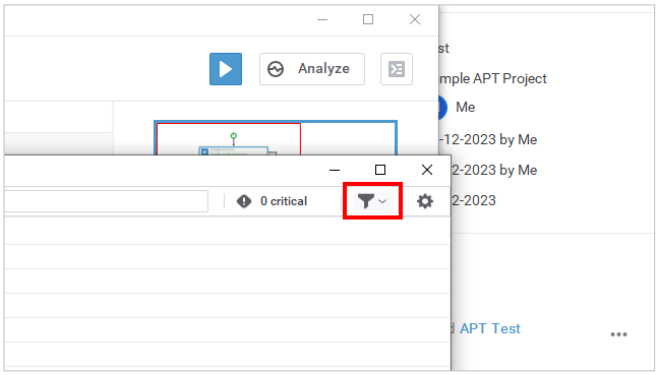
After saving the iterations, click the icon: **Analyze the test for any flow-related issues**.



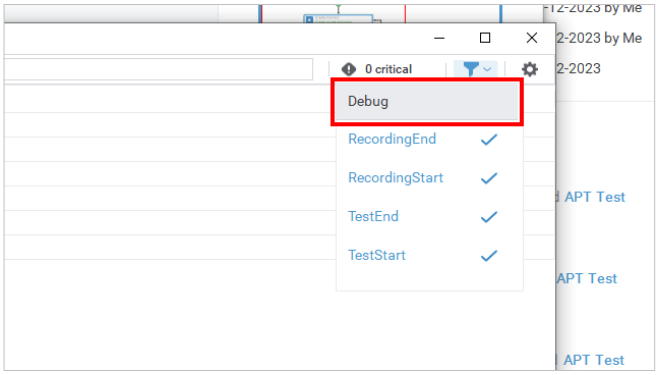
Click on the window title of **APT Test.log**. This shows you the complete flow of your test.



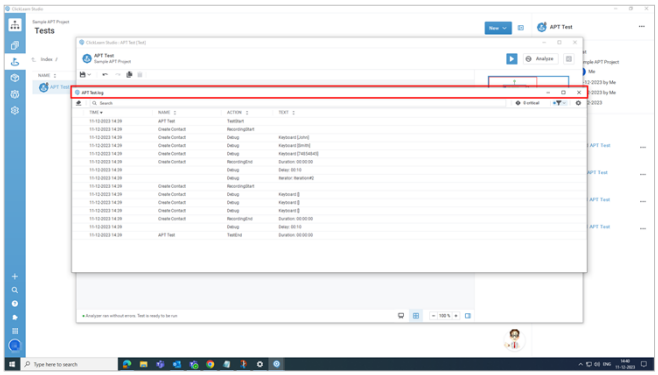
Click the **Log Action Filter** button to view the filter options associated with the log file.



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



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

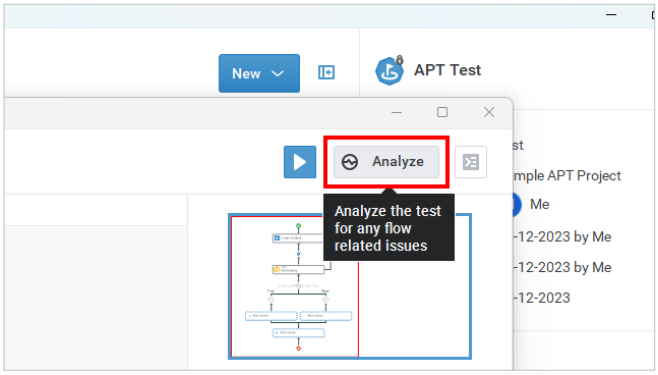


15.4.Run and Analyse a Test

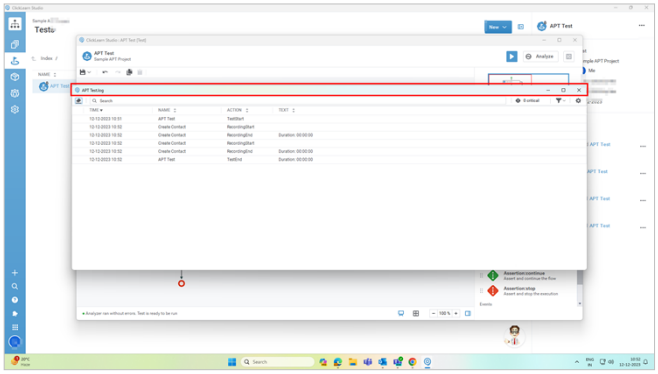
Run your test hands-off and let ClickLearn drive the process end to end, so you see exactly where a workflow breaks and why, from a detailed log, without stepping through each check manually.

15.4.1. 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.**

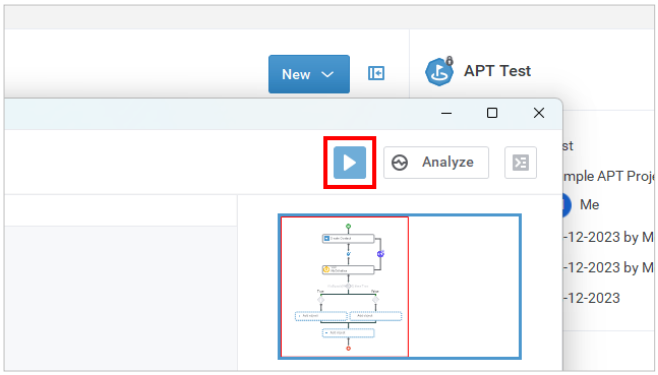


This opens up the **APT Test.log** file, which displays the complete test flow along with the errors, if any.

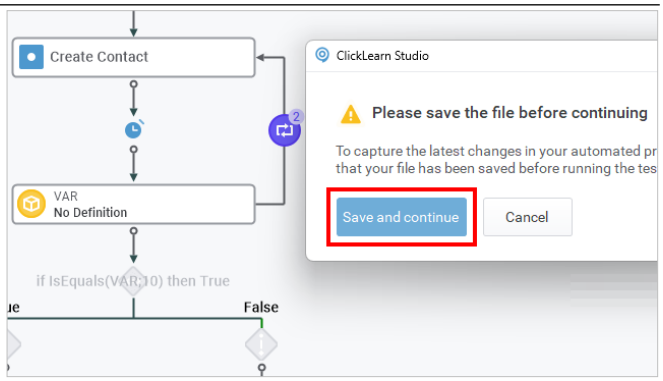


15.4.2. Run Test

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.

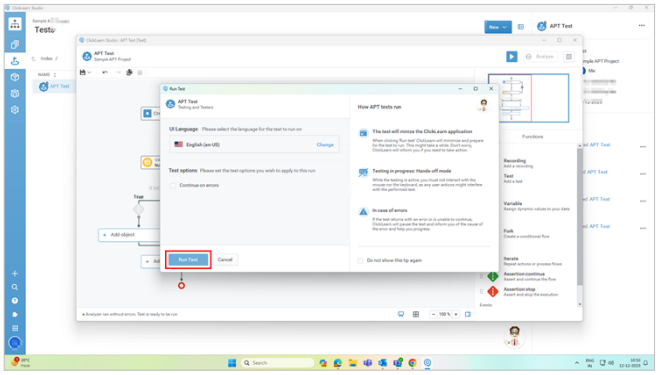
The test minimizes the ClickLearn Attain application: When clicking Run Test, ClickLearn will minimize and prepare for the test to run. ClickLearn will inform you if you need to take action.

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.

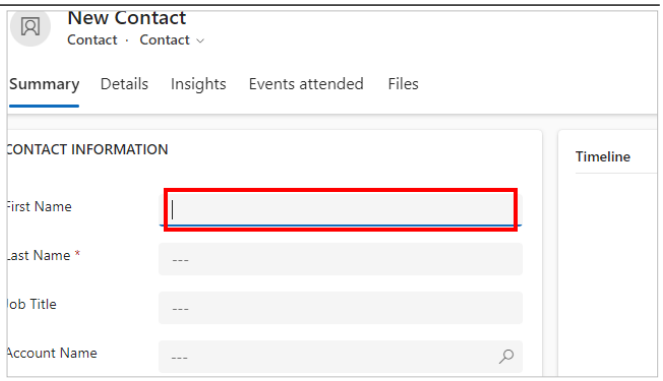
Click on the button **Run Test.**

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

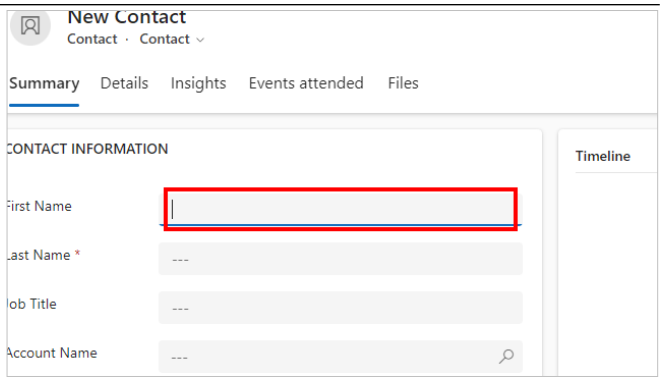


This will perform the same recording steps and enter the values assigned in the data points.

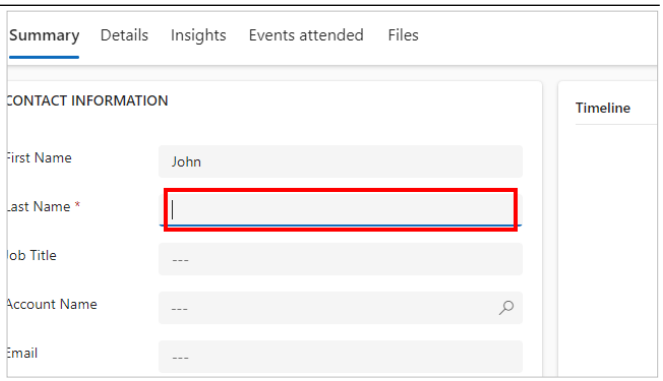
Click on the input field **First Name**.



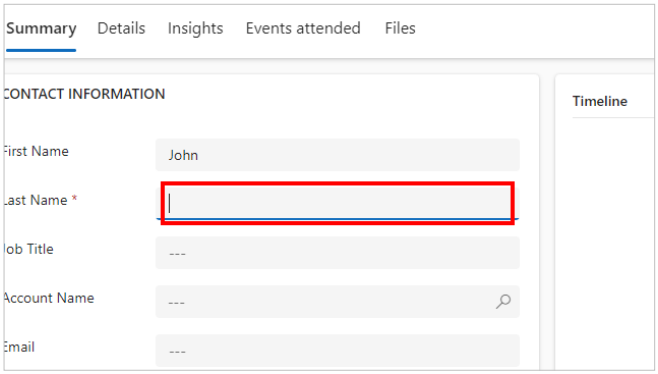
Enter **First Name**.



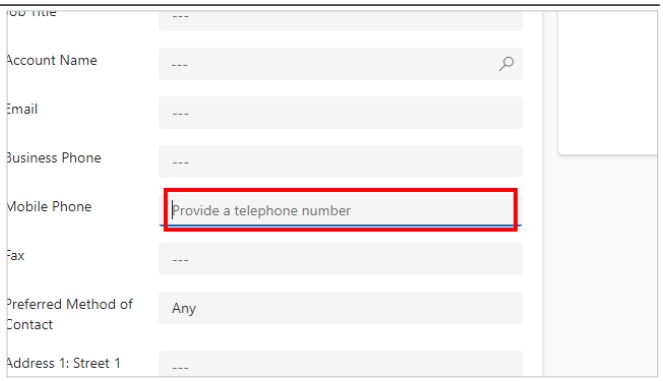
Click on Last Name.



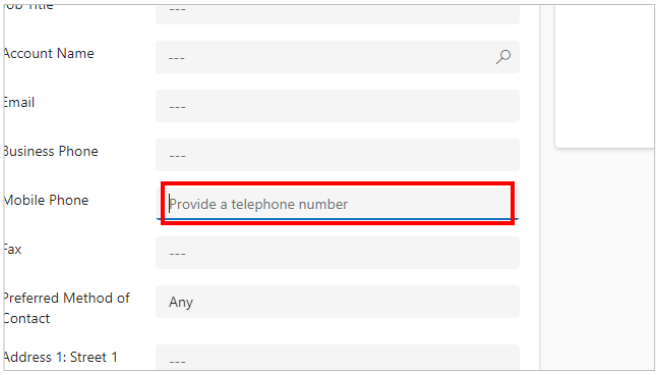
Enter **Last Name**.



Click on Mobile Phone.

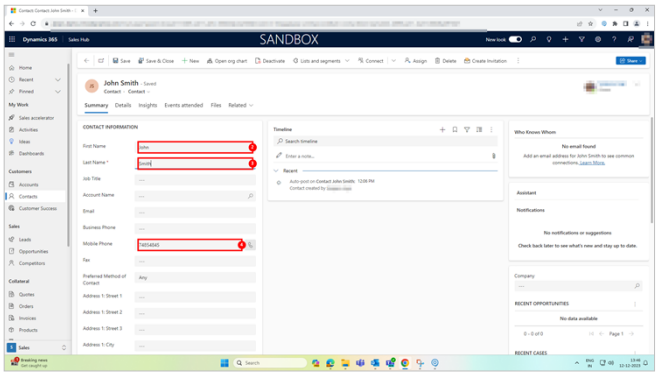


Enter **Mobile Phone**.

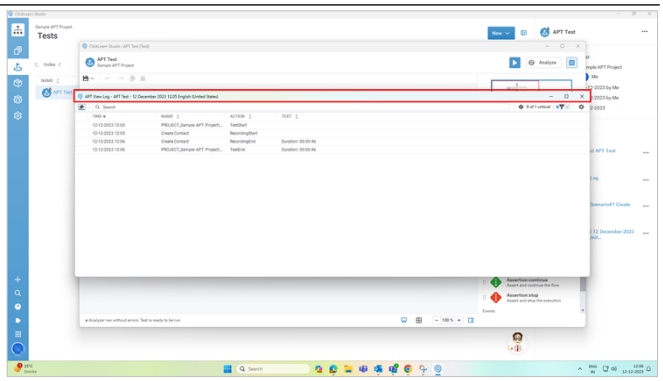


Values added in the application.

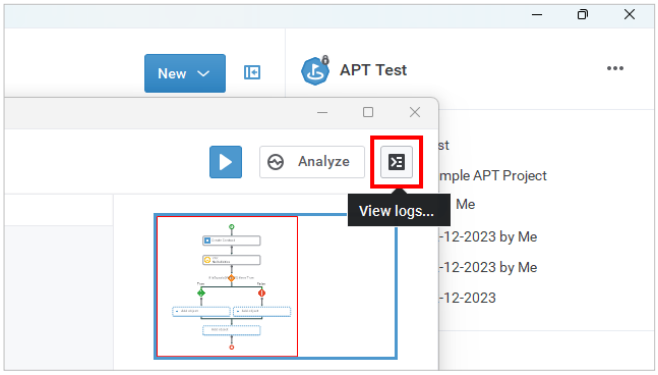
1. We added these values to the application from the data points we created.
2. First Name.
3. Last Name.
4. Mobile Phone.



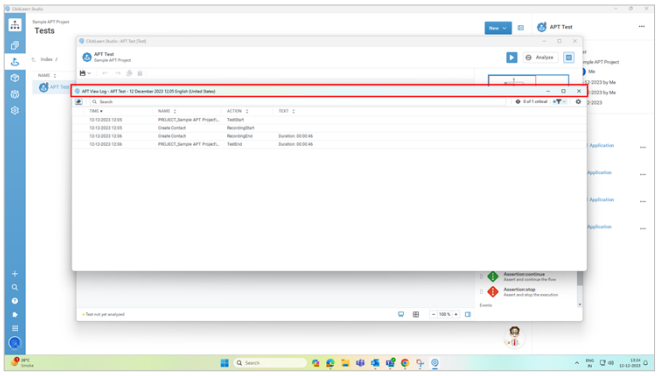
After the test is complete, it displays the **APT View Log** file.



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



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

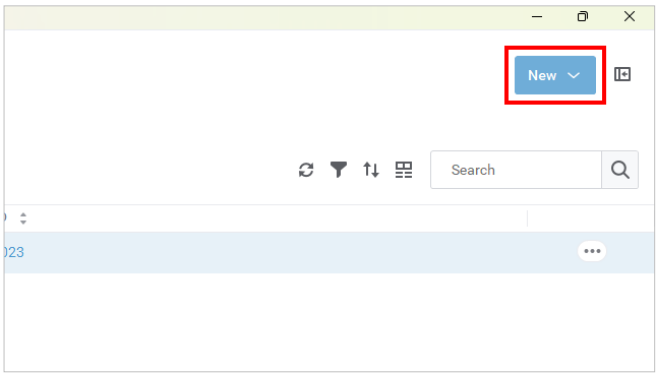


15.5.APT End-to-End Example

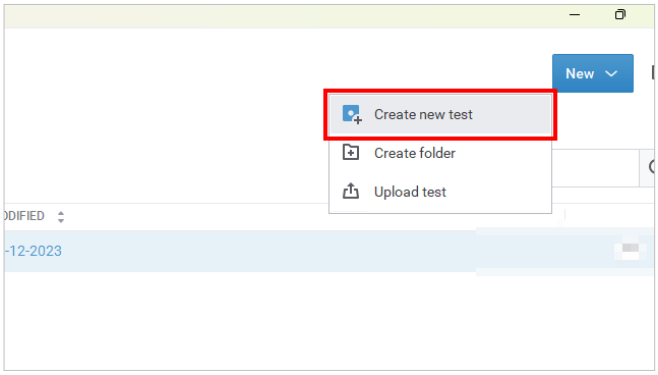
Build a complete test from scratch, objects, logic, data, and assertions, so you can validate a full process end to end in one place, without wiring together separate tools or manual checks.

15.5.1. Create a new test.

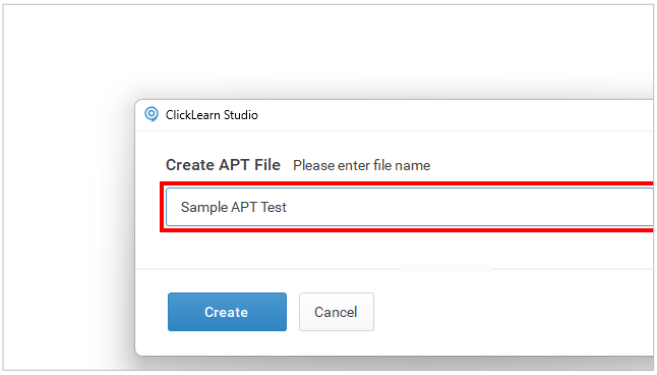
Click on the button **New**.



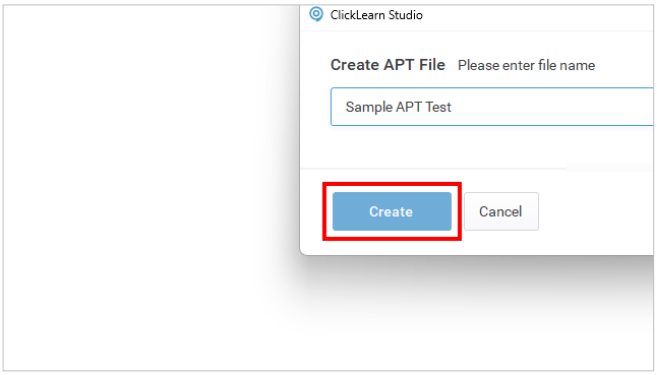
Click on the menu item **Create new test**.



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

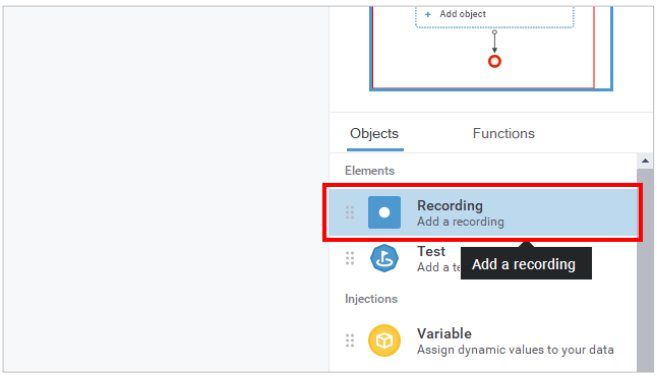


Click on the button **Create**.

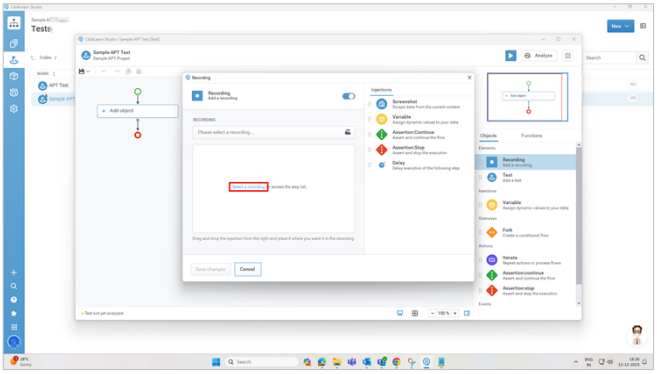


15.5.2. Process View: Adding objects to test

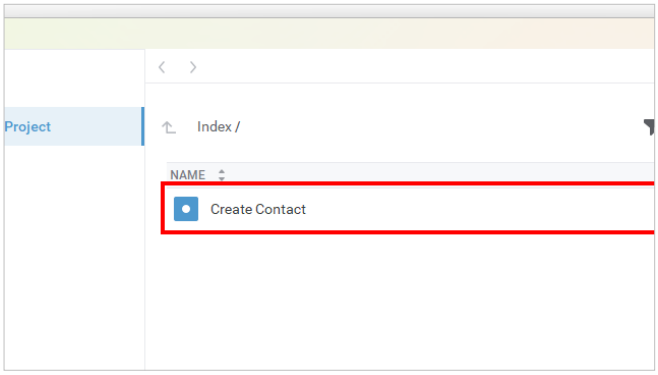
Click on the node **Recording** and drag and drop in the test panel.



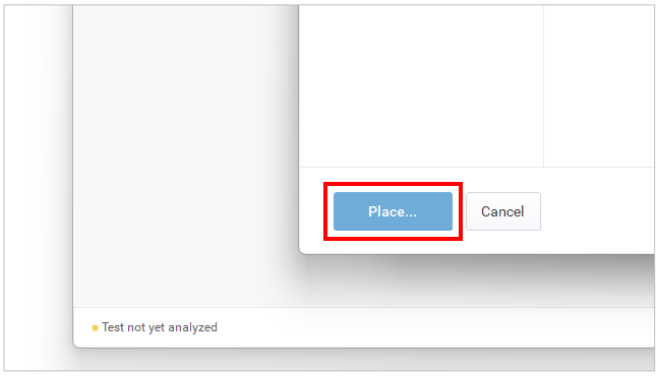
Click on the label: **Select a recording**.



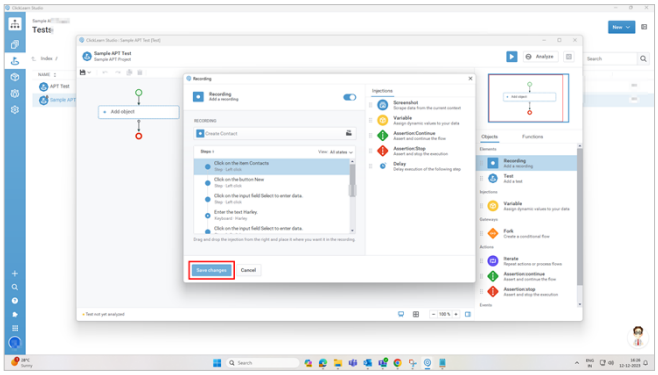
Click on the cell **NAME** with the value **Create Contact**.



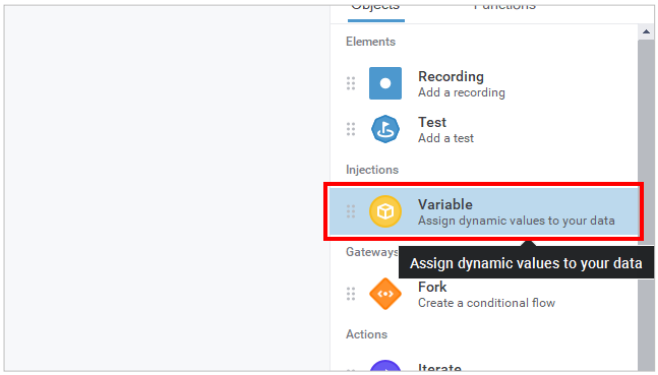
Click on the button **Place**.



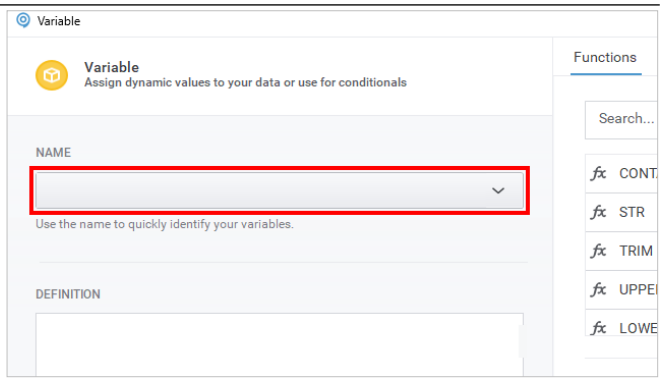
Click on the button **Save changes**.



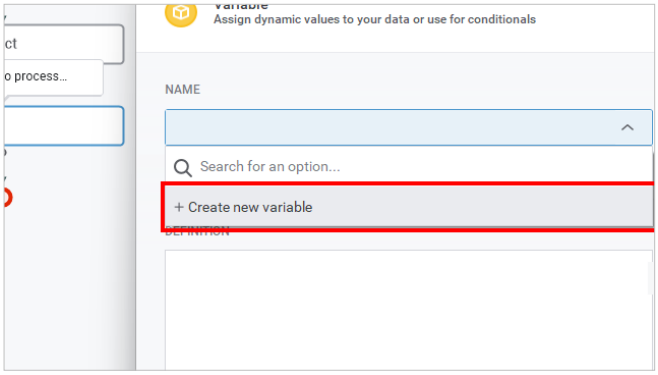
Click on the node **Variable**.



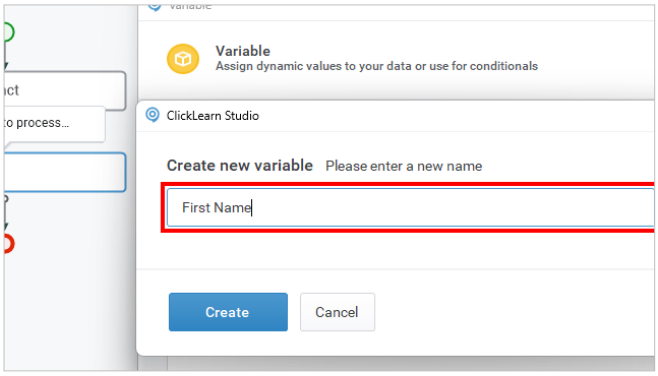
Click on the dropdown **Variable Name**.



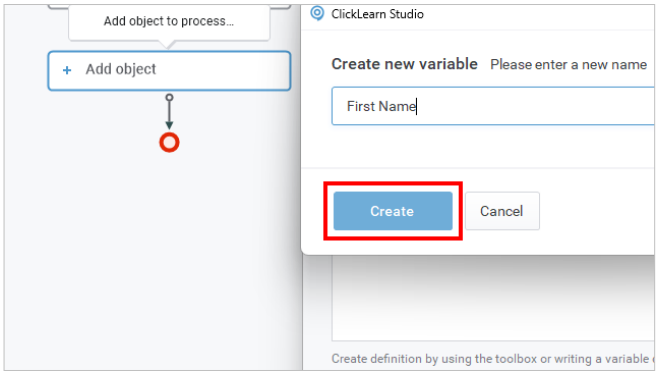
Click on the list view item: **Create new variable**.



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

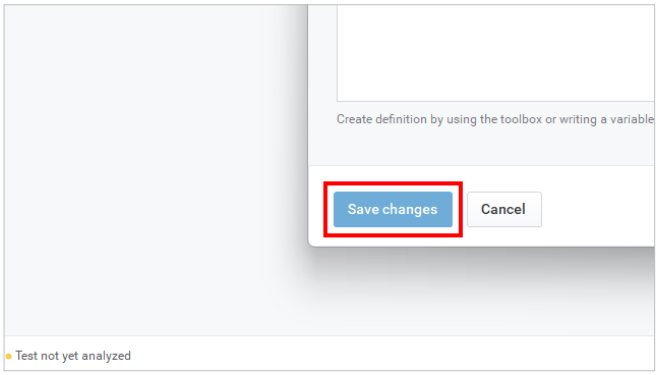


Click on the button **Create**.

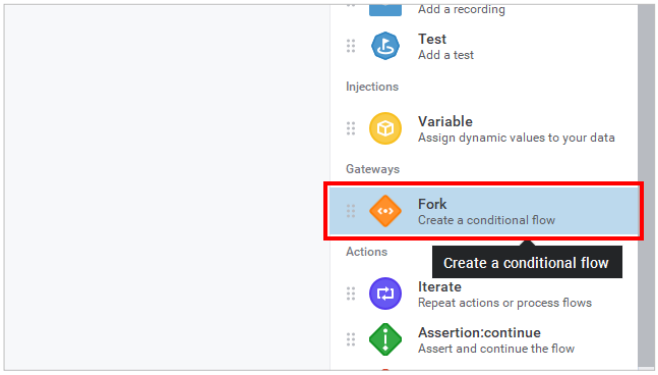


Click on the editor and enter text **Smith**.

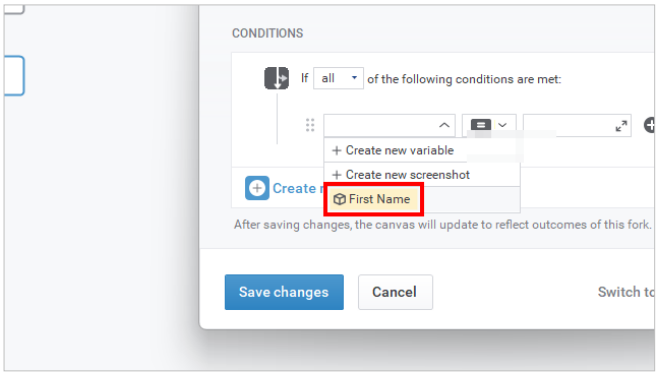
Click on the button **Save changes**.



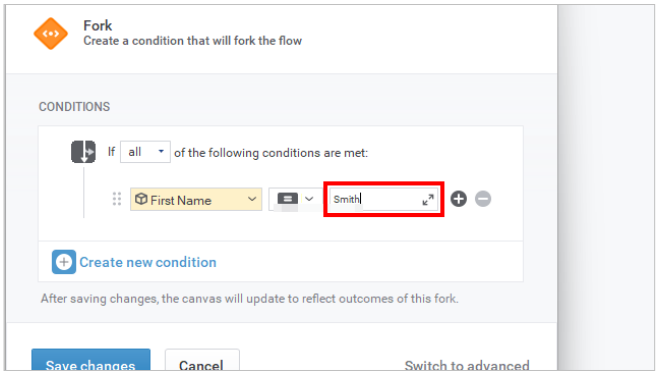
Click on the node **Fork** and drag and drop in the test panel.



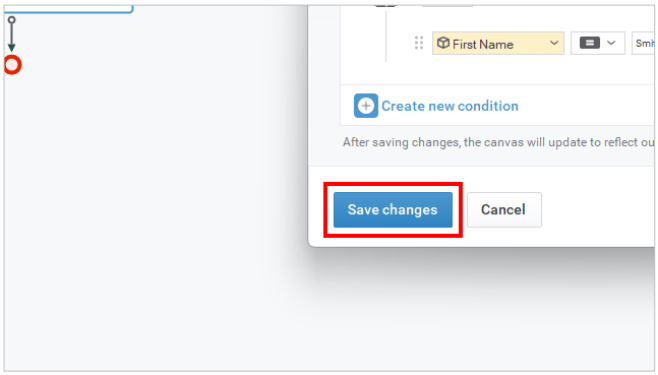
Click on the dropdown item **First Name**.



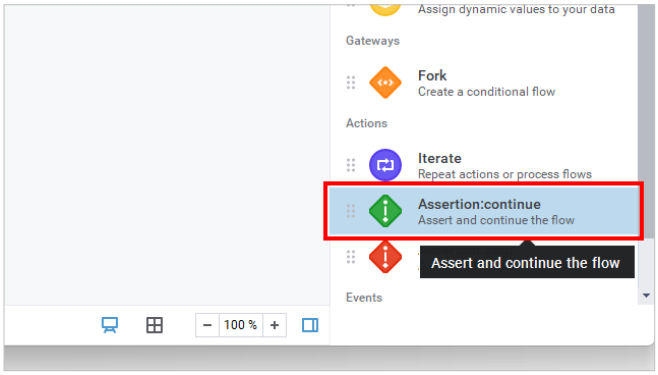
Click on the input textbox **Value** and enter text Smith.



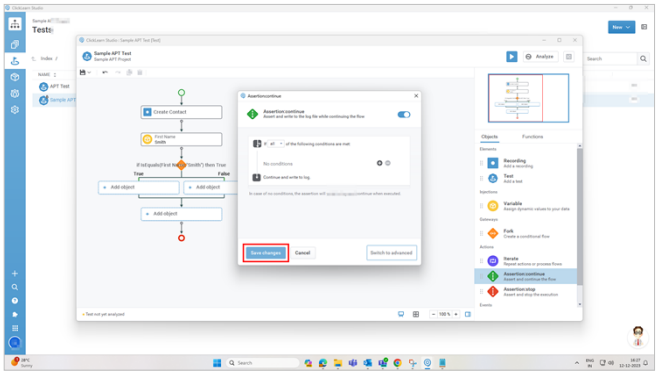
Click on the button **Save changes**.



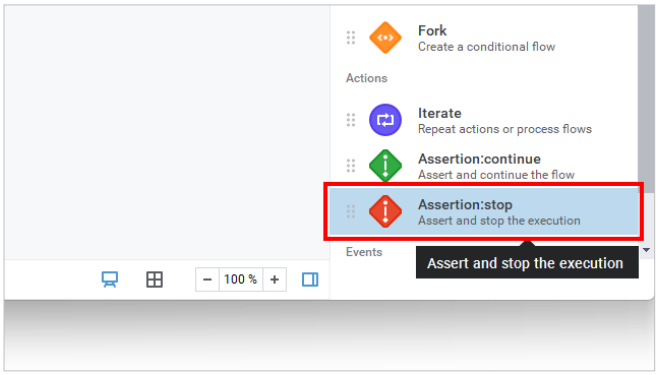
Click on the node **Assertion: continue** and drag and drop in the test panel.



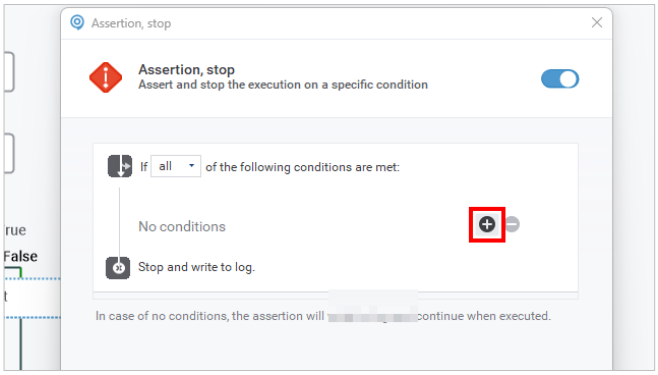
Click on the button **Save changes**.



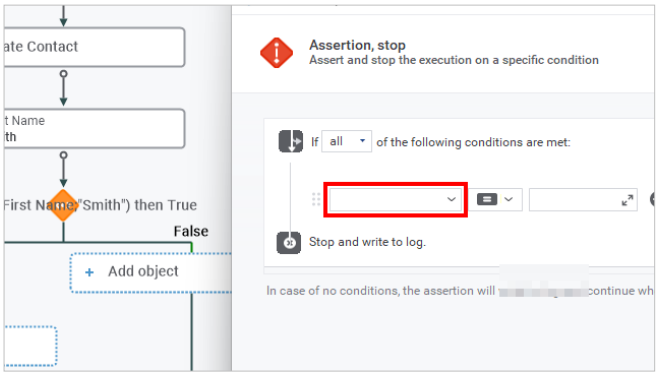
Click on the node **Assertion: stop** and drag and drop in the test panel.



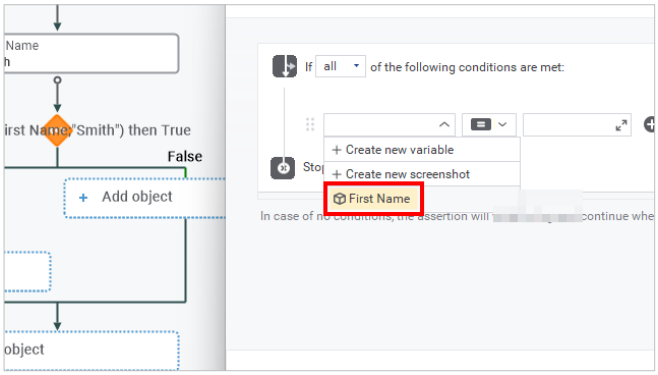
Click on the icon **Plus**.



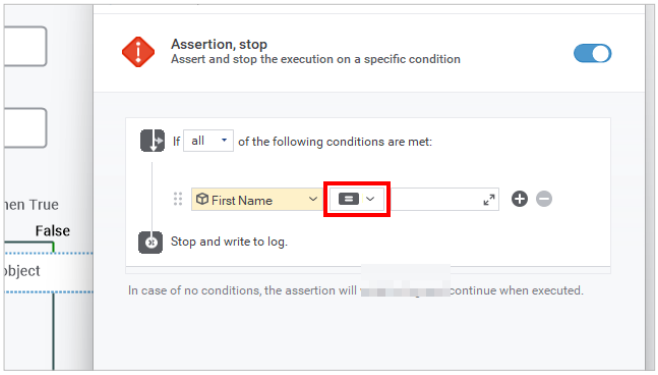
Click on the dropdown item.



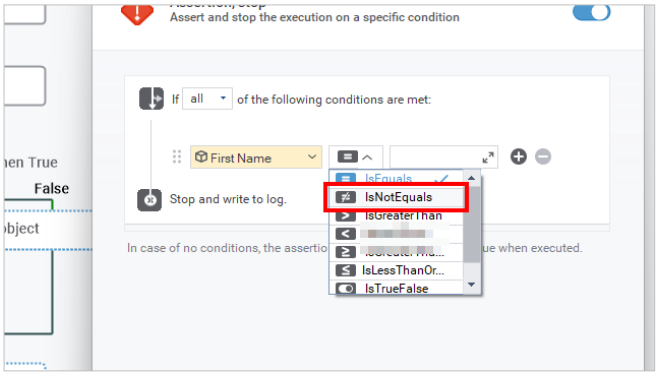
Click on the dropdown item **First Name**.



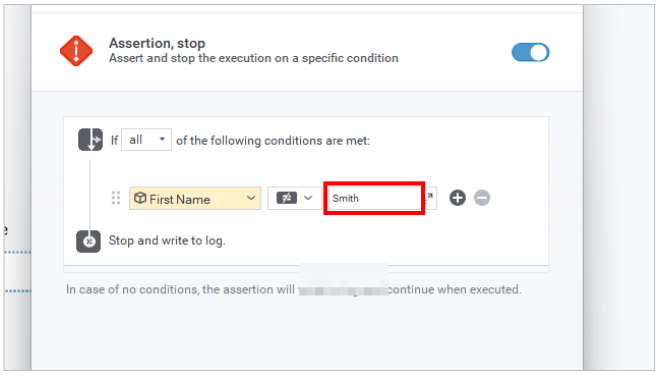
Click on the dropdown item **IsEquals**.



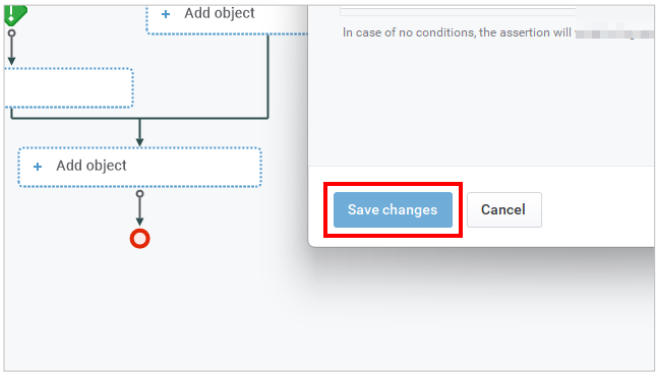
Click on the dropdown item **IsNotEquals**.



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

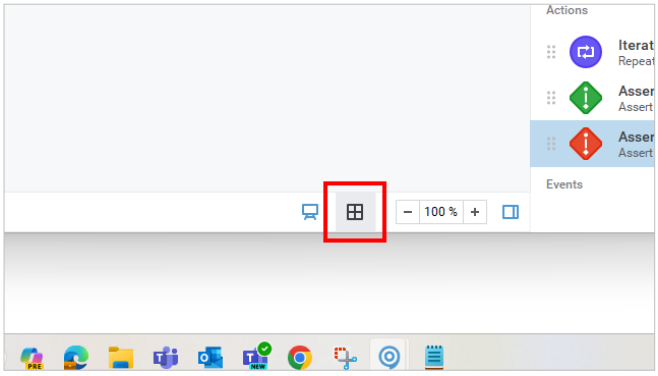


Click on the button **Save changes**.

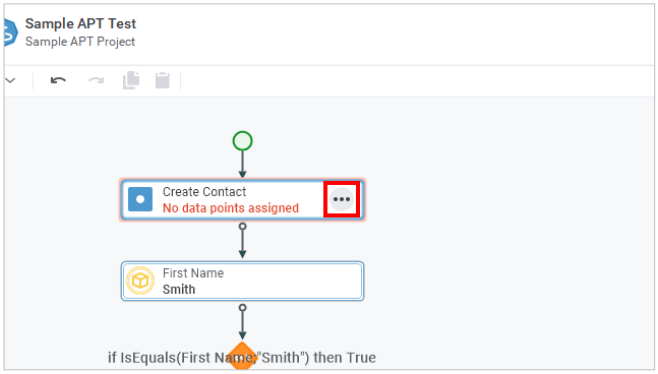


15.5.3. Data View: Adding data points to test

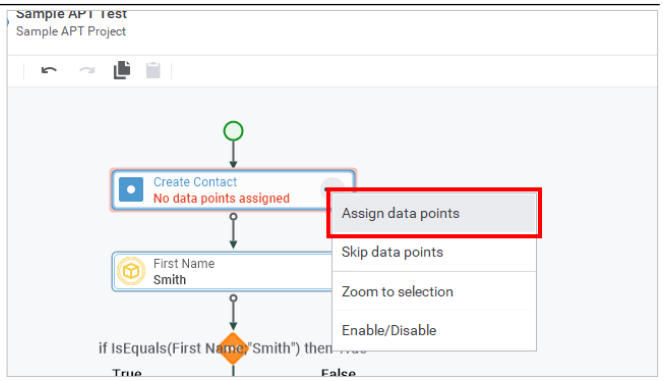
Click on the icon **Data view**.



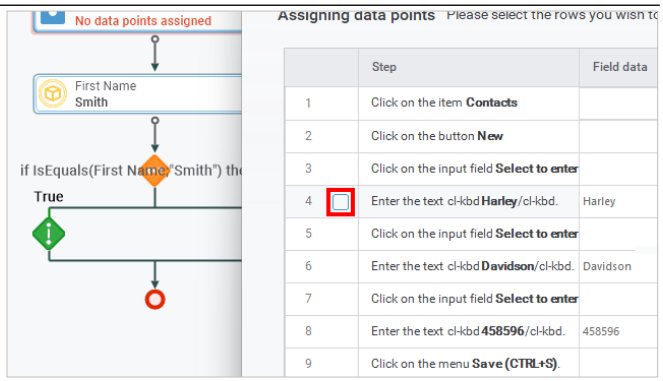
Click on the diagram element **More** with value.



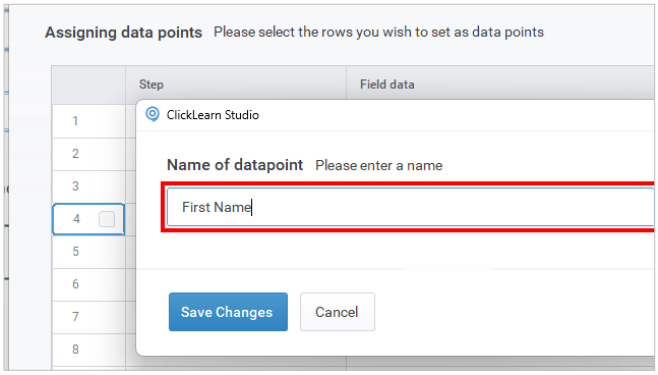
Click on the menu item **Assign data points**.



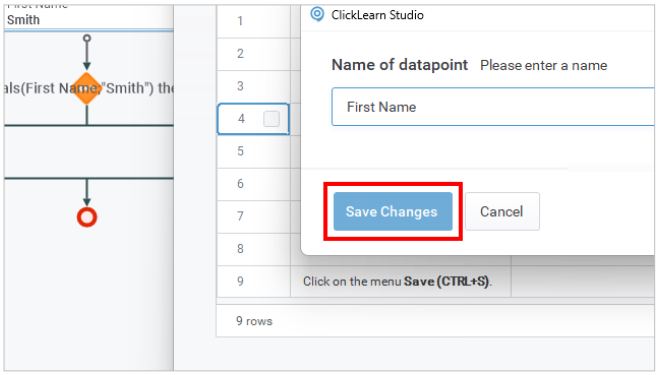
Click on the checkbox of the grid cell.



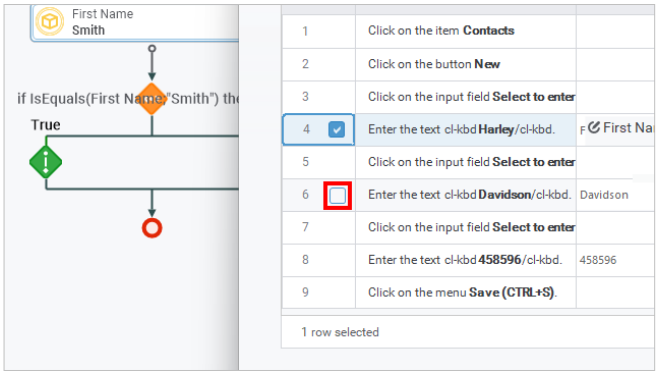
Click on the textbox **Txt Rename** and enter the name for the data point.



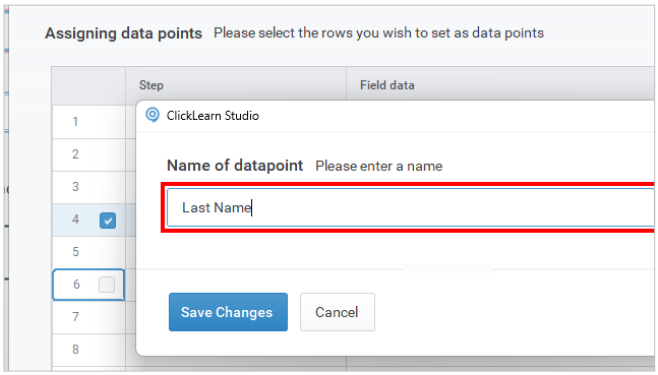
Click on the button **Save Changes**.



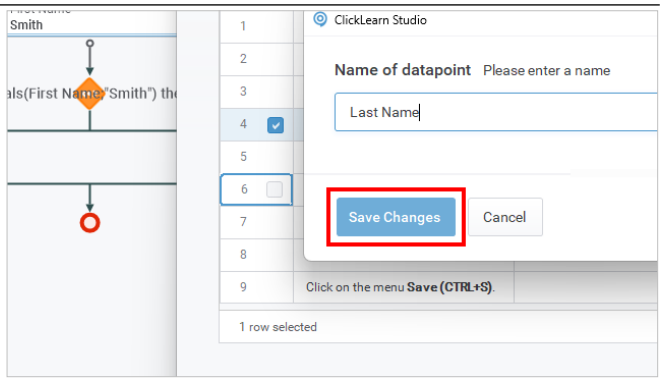
Click on the checkbox of the grid cell.



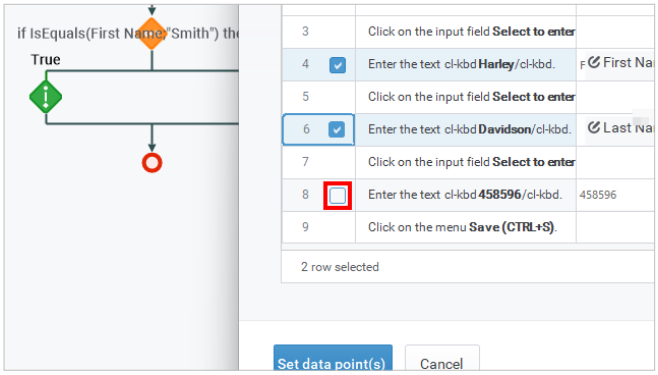
Click on the textbox **Txt Rename** and enter the name for the data point.



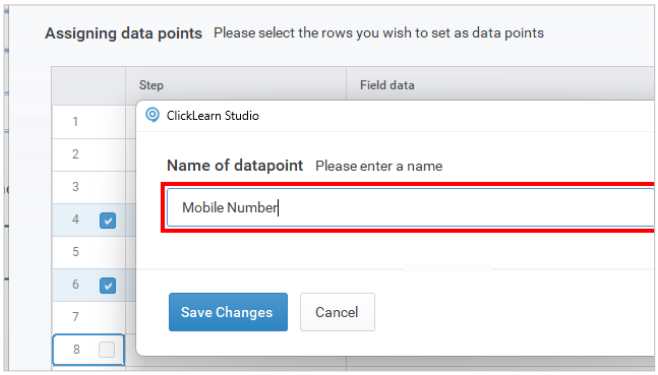
Click on the button **Save Changes**.



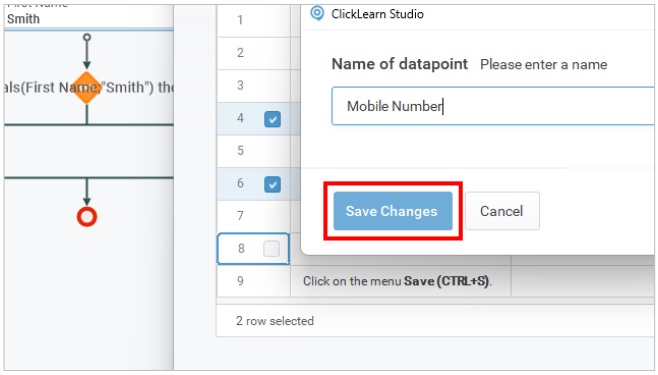
Click on the checkbox of the grid cell.



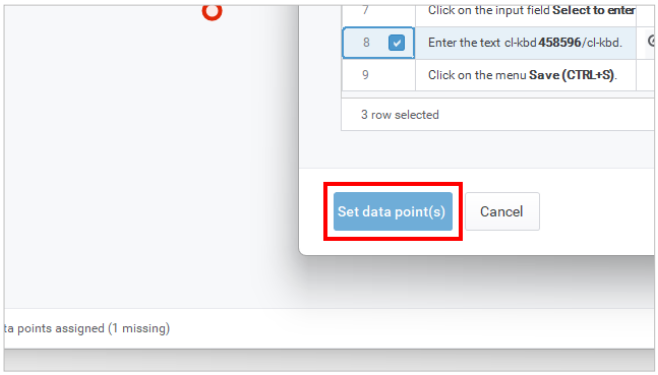
Click on the textbox **Txt Rename** and enter the name for the data point.



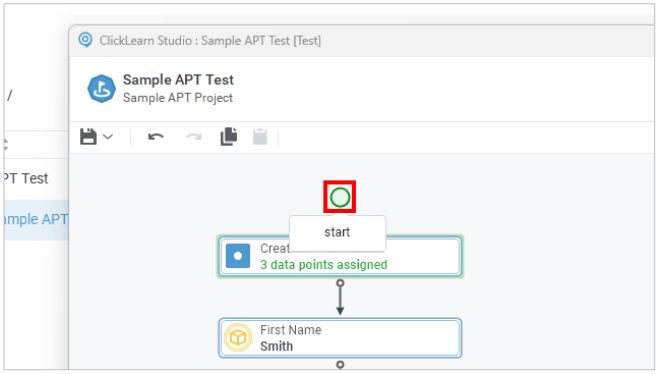
Click on the button **Save Changes**.



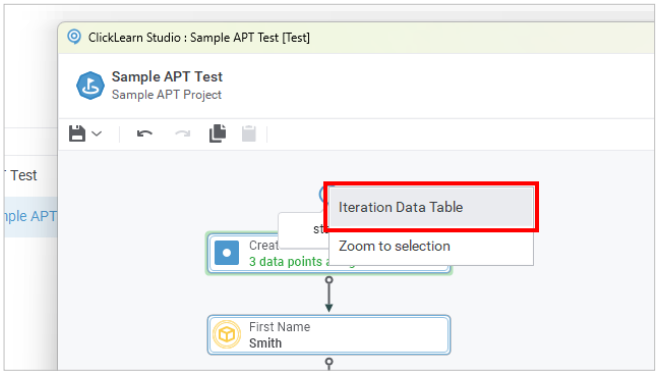
Click on the button **Set data point(s)**.



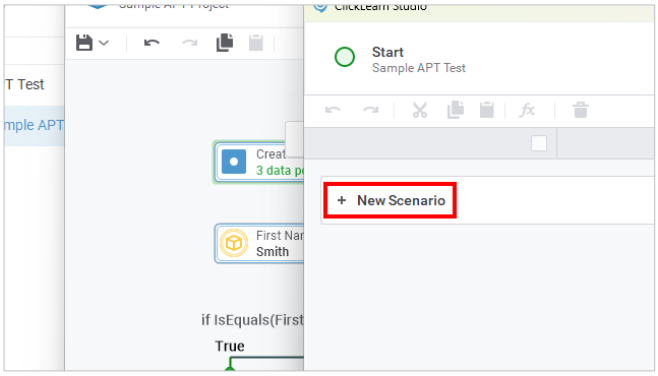
Right-click on the diagram element **start**.



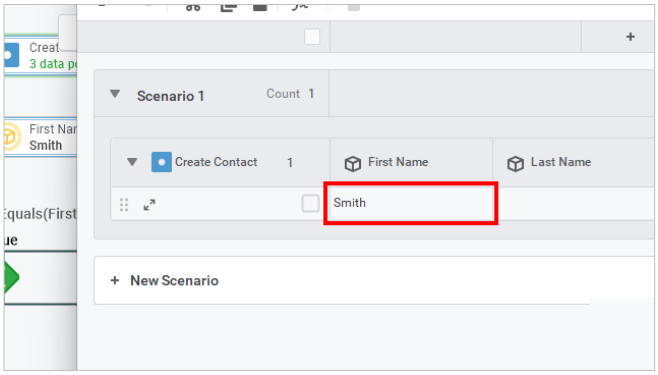
Click on the menu item **Iteration Data Table**.



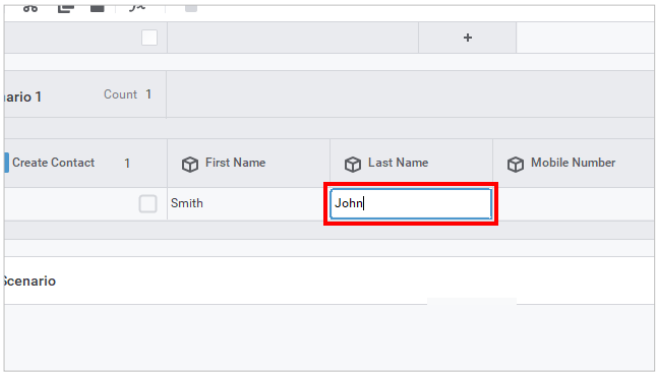
Click on the button **New Scenario**.



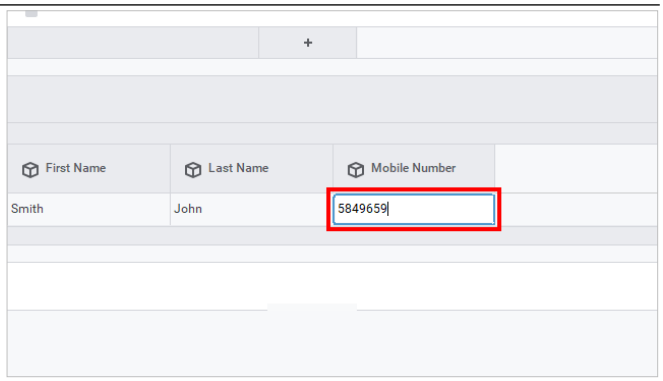
Click on the grid view cell's **First Name** and enter text.



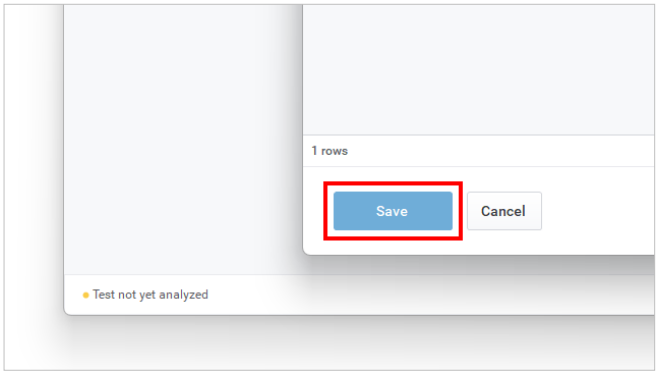
Click on the grid view cell **Last Name** and enter text.



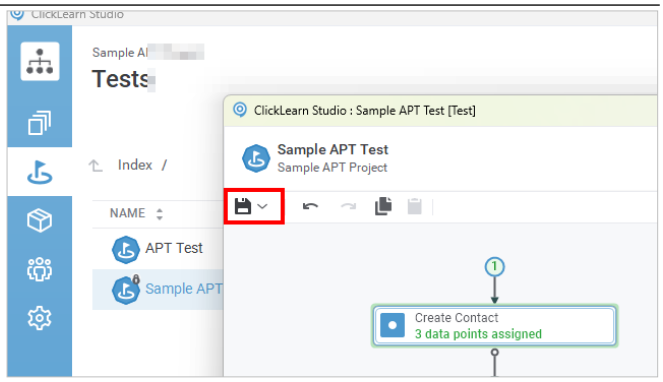
Click on the grid view cell **Mobile Number** and enter a number.



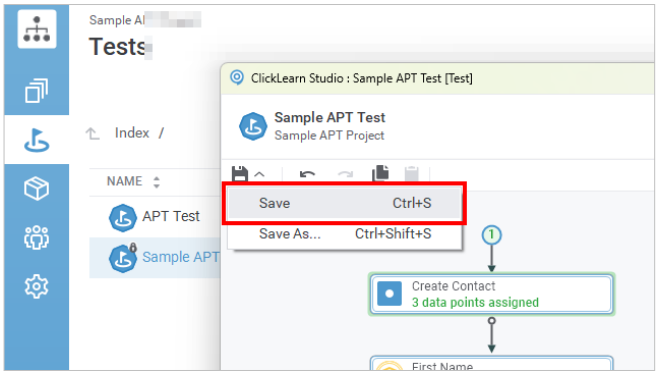
Click on the **Save** button.



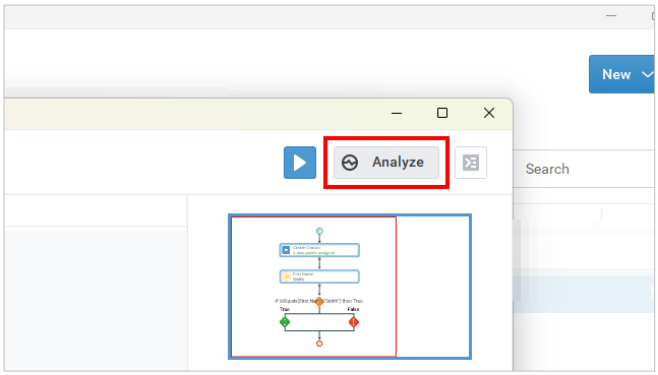
Click on the split button: **Save (Ctrl + S)**.



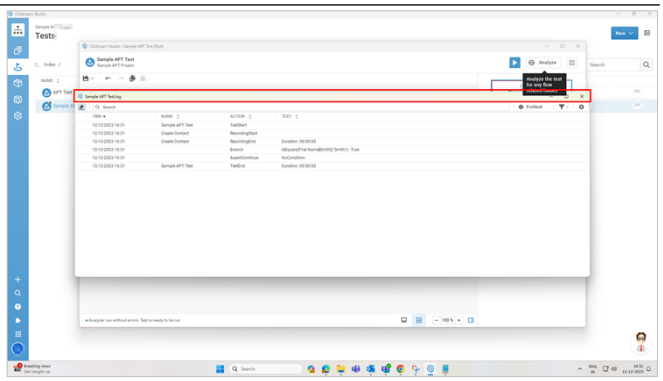
Click on the menu item **Save**.



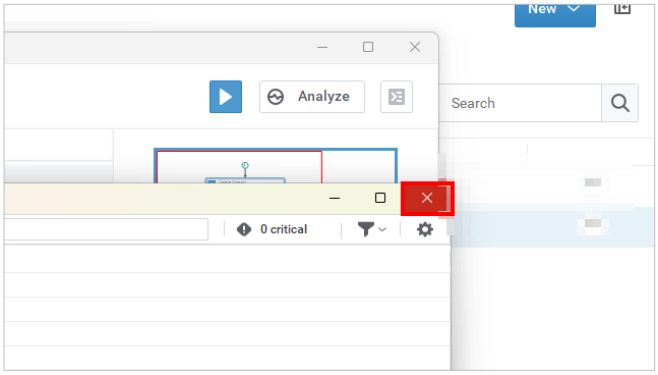
Click on the icon: **Analyze the test for any flow-related issues**.



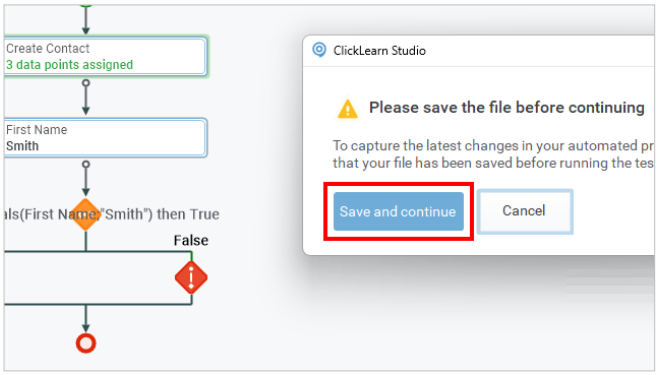
This opens up the **Sample APT Test.log** file.



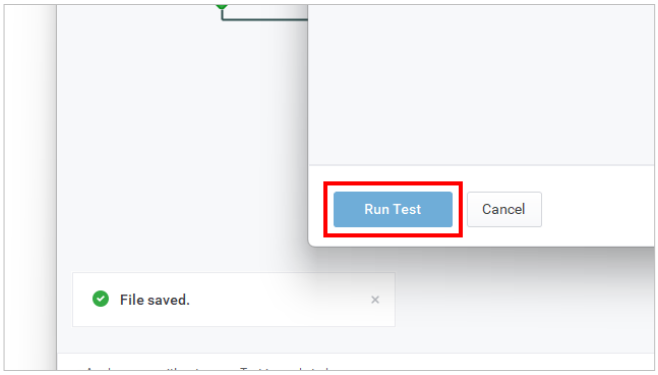
Click on the close button of **Sample APT Test.log**.



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

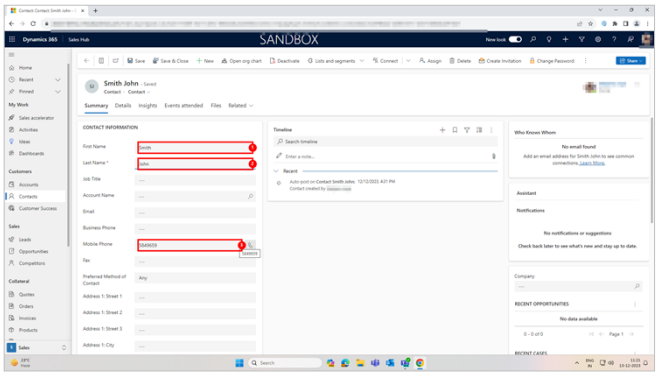


Click on the button **Run Test**.

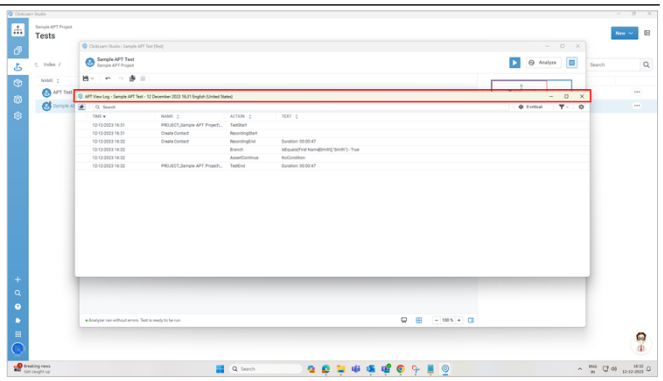


Values added in the application from the data points

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



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



15.6.Schedule Automated Test Runs

Set your tests to run on their own at any hour, so critical processes get validated overnight or on schedule, without anyone needing to sit at the machine to kick them off.

15.6.1. Pre Requisites

To schedule a test file to run at a specific time, you should

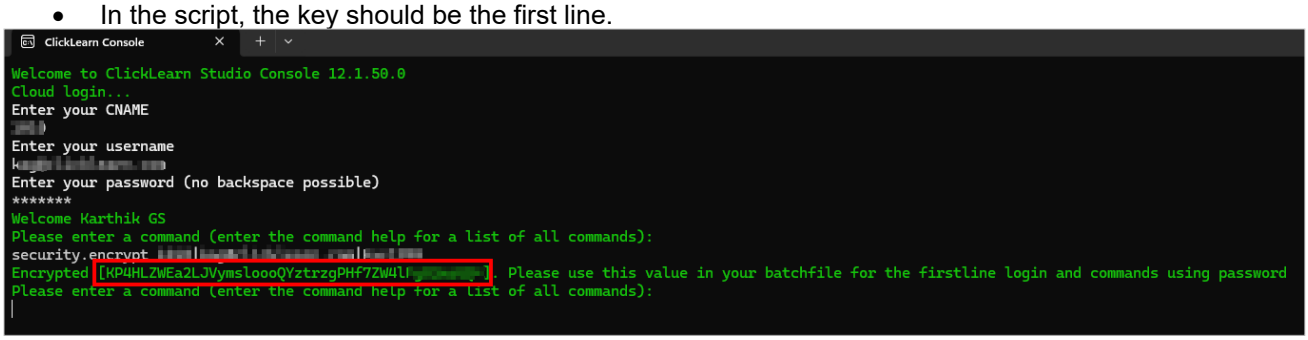
- Have created a test file that runs successfully.
- Install the latest ClickLearn Console.
- Make sure you can add a task in the task scheduler.
- Make sure the machine on which you run this is on and unlocked while its running, we recommend the scheduling done on a VM.

15.6.2. Generate the security key

- Open ClickLearn Console
- Enter your CNAME[Organisation Name] followed by the username and password that you use to log in to ClickLearn Studio to login.
- Enter the below command, make sure you provide your cname, username and password

security.encrypt cname|username|password

- This will give you a key, which you should copy to a text file.
- In the script, the key should be the first line.



15.6.3. Script for running an APT test

KP4H7896a2LJVymsloooxXxXxxXx112233XXXXXXX=
//The first line is the security key extracted from the command security.encrypt cname|username|password in ClickLearn Console

lcid 1033
// Make sure we are executing in English. Use 1031 for German

list select project "%Sample APT"
//Replace Sample APT with your APT project name so that project is selected.

edit
//Edit the selected project.

apt.run "APT Test" true
//Replace the APT Test with your test file name and this command will run the selected test.

apt.savelog "c:\temp\aptlog140403.xml
//After the test ran, this command will save the log file.

close
//Close the opened project.

quit
// The exit code from the application will be -3 if ANY apt.run failed your expectation.

15.6.3.1. Exit Codes

- Login failed "-1"
- Cannot find testfile "-2"
- Execution not as expected "-3"

15.6.4. Prepare a bat file

Make sure to edit the above script with your data and save it in a text file.
Eg. D:\APT\Test1\SampleApt.txt

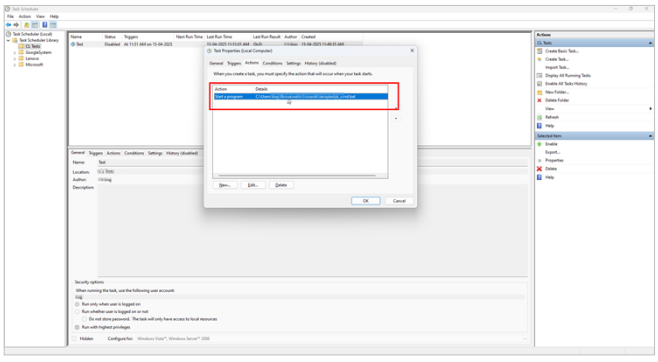
Open a notepad and enter the below text but make sure to use the script path and log path is as per your machine.

@echo off
"C:\Program Files (x86)\ClickLearn\ClickLearn Console\ClickLearnConsole.exe" "
D:\APT\Test1\SampleApt.txt" > c:\temp\clconsole.log

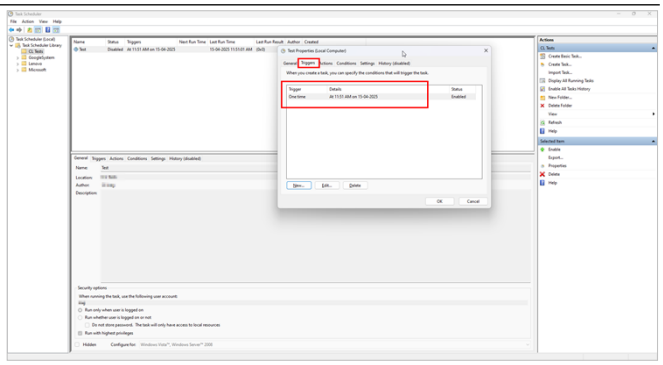
Save as the notepad to modify the extension to ***.bat***

15.6.5. Task Scheduler

Test the bat file by double-clicking it to see if it runs the test correctly, then you can load the Task Scheduler to add the action to start a program.



Set the appropriate triggers as per your configuration and enable the task.



15.7.Troubleshoot APT Failures

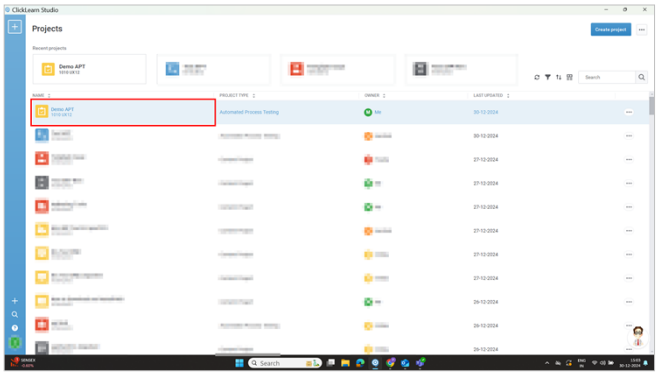
Pinpoint why a test failed and fix it fast, so misclicks, data gaps, and application changes get diagnosed from the replay itself, without guesswork about what went wrong.

15.7.1. Introduction

Automated Process Testing (**APT**) is an effective tool for validating workflows and ensuring processes function as planned. However, when replays fail during APT, troubleshooting is required to identify and resolve problems promptly. Here, we will discuss possible ways for APT troubleshooting.

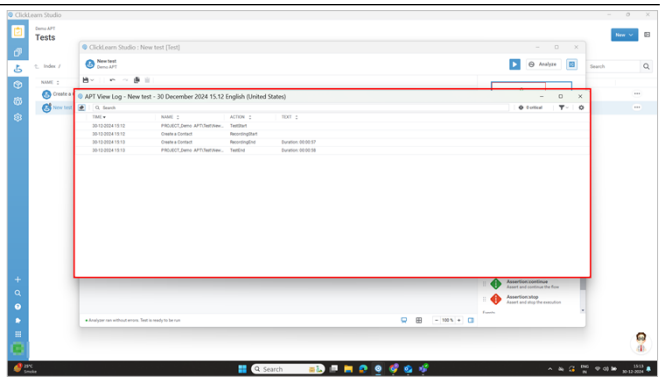
Select an APT project and run the test.

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



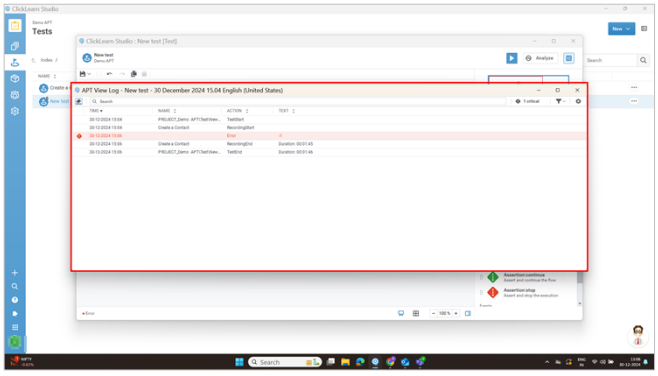
Once you run the test and if Replay is successful:

If the replay runs successfully, it means the test has been executed without errors, and the actions recorded align perfectly with the intended process. This means no further action is needed.



If Replay is failed:

A failed replay indicates that something went wrong during the test execution, and the system couldn't follow the steps as planned. This can happen for several reasons, such as:

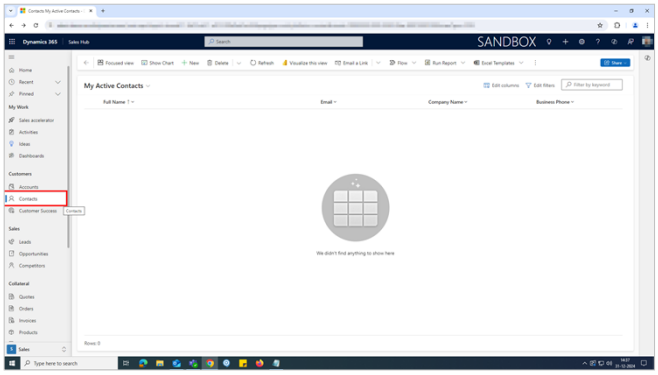


- **Incorrect Replay**: This happens when the system tries to perform an action but clicks on the wrong screen or element.
- **Data Issue**: This occurs when the data entered during the recording or replay doesn't match what the system expects.
- **Application Changes**: If the application's design or functionality has changed (e.g., a button was renamed or moved), the replay might fail because it can't find the elements recorded in the test.

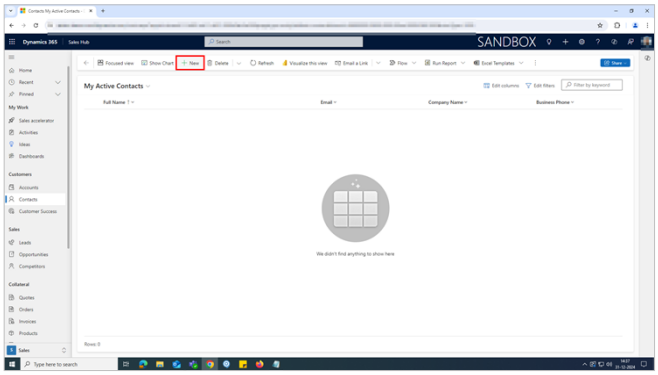
- **Timing Issues**: The replay might fail if the system tries to perform an action before the application is ready (e.g., loading a page or processing data).

15.7.1.1. Recorded Steps

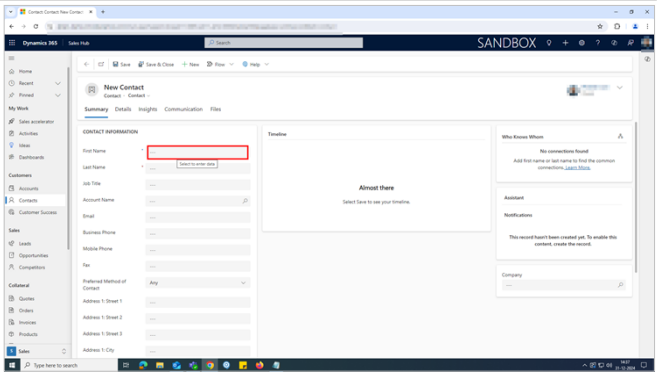
Click on the item **Contacts.**



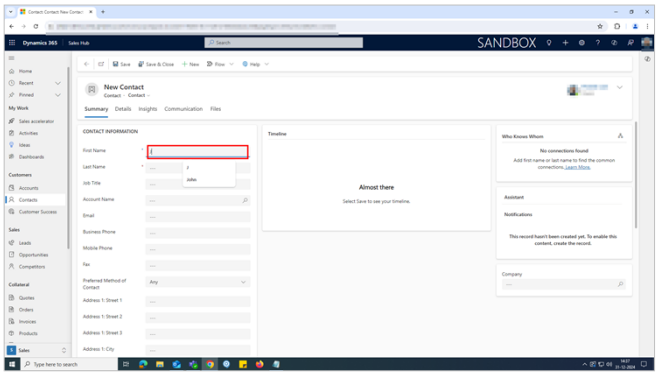
Click on the button **New.**



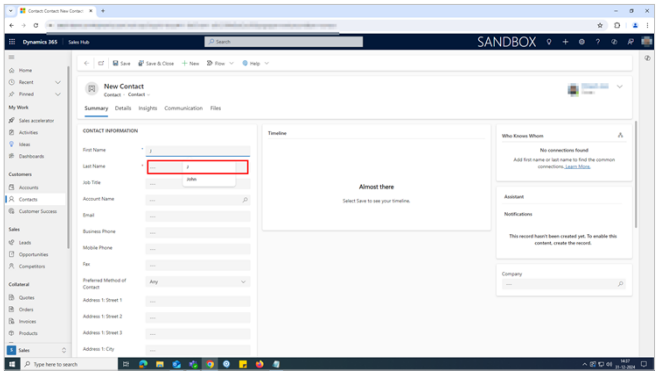
Click on the text field **First Name.**



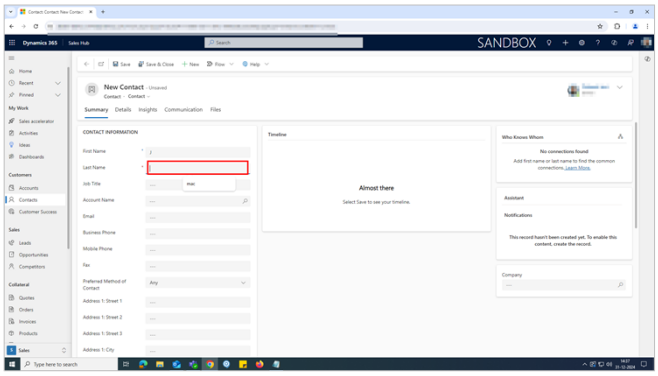
Enter **First Name**.



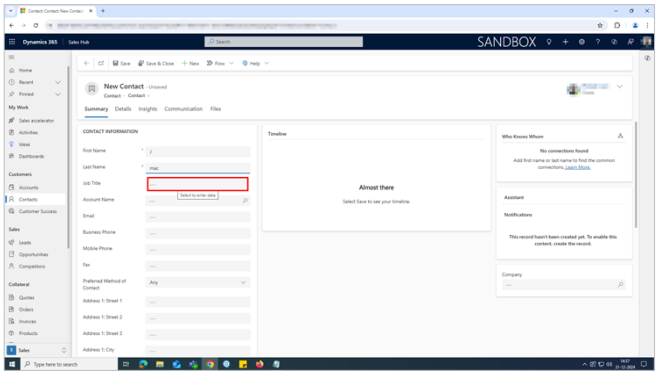
Click on the text field **Last Name.**



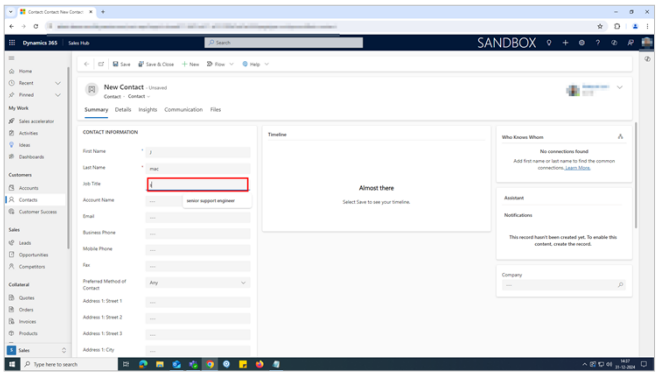
Enter **Last Name**.



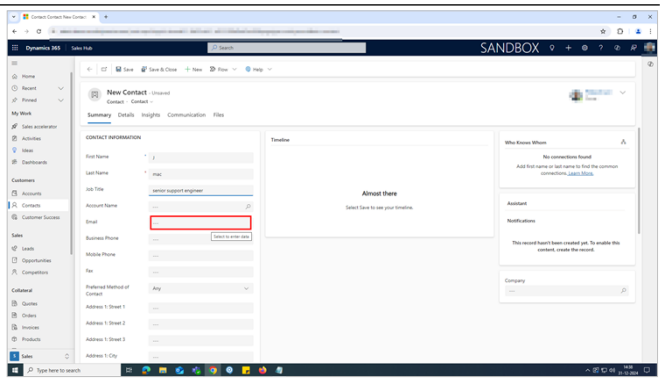
Click on the text field **Job Title.**



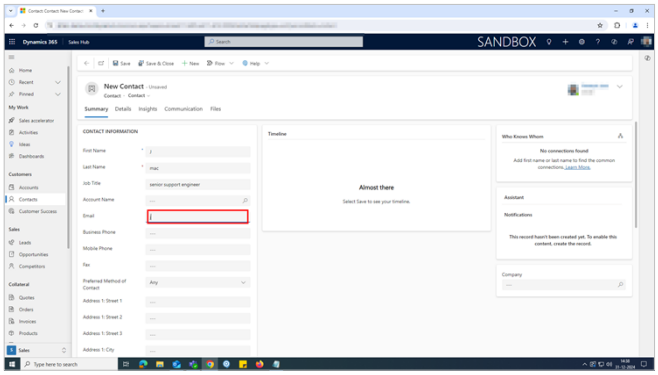
Enter the text **senior support engineer**.



Click on the text field **Email.**

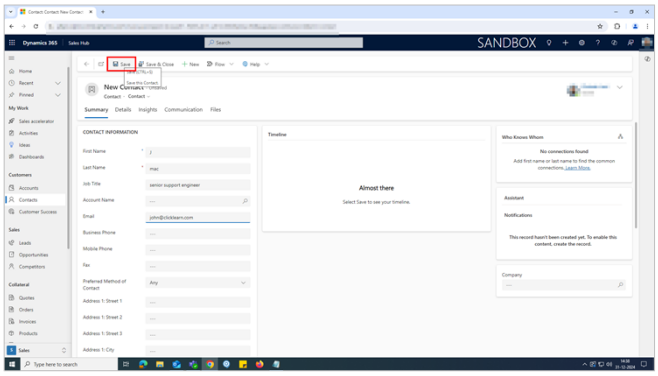


Enter **Email**.



Click on the button **Save (CTRL+S)**
The steps you record should be accurately replayed in the same order. If a replay is successful, it means that all steps have been recorded perfectly.

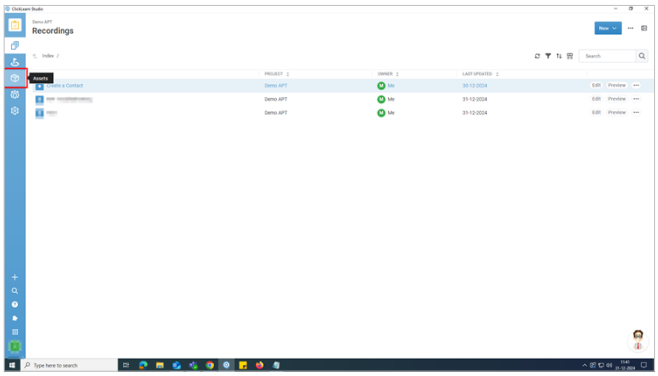
If the replay fails, troubleshoot the error by following these steps.



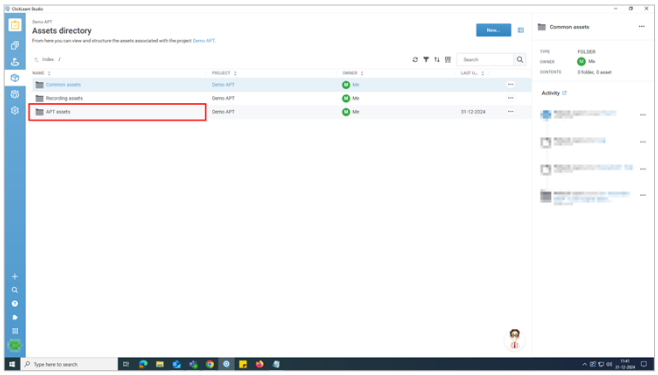
15.7.1.2. How to Troubleshoot the Error

This happens when the system tries to perform an action but clicks on the wrong screen or element.

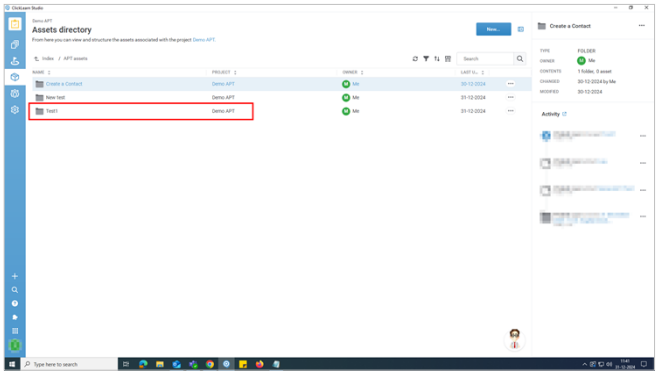
Click on the button **Assets.**



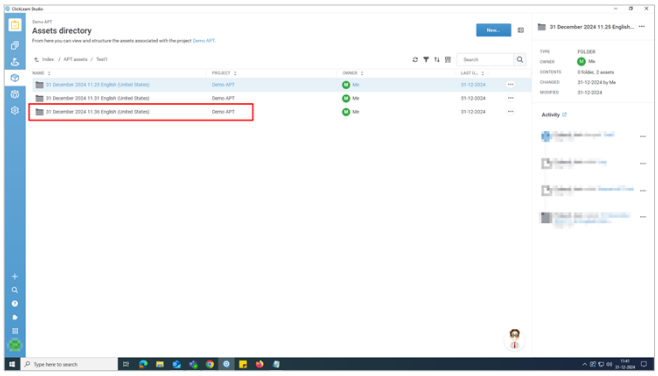
Double click on the gridview cell **NAME** with data **APT assets.**



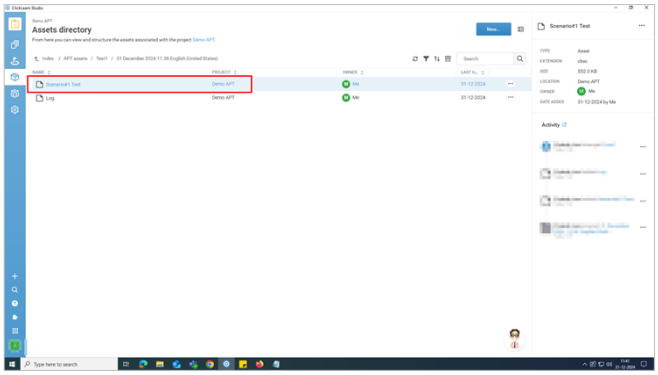
Double click on the gridview cell **NAME** with data **Test1.**



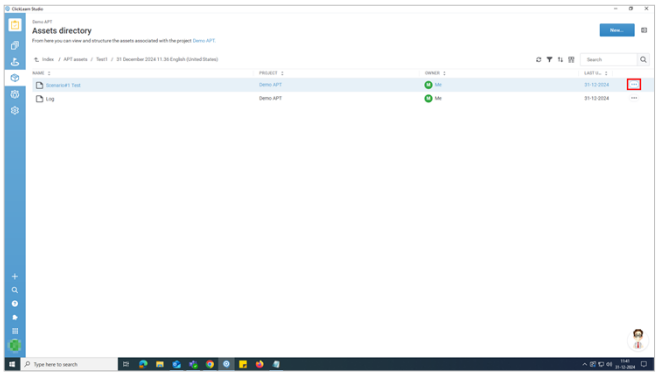
Double click on the gridview cell - **31 December 2024 11.36 English (United States).**



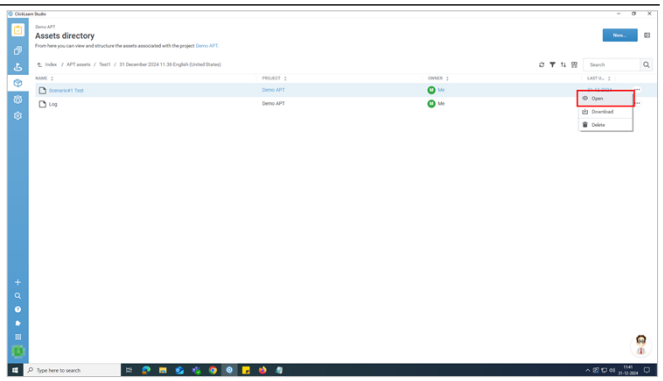
Select the **Scenario#1 Test.**



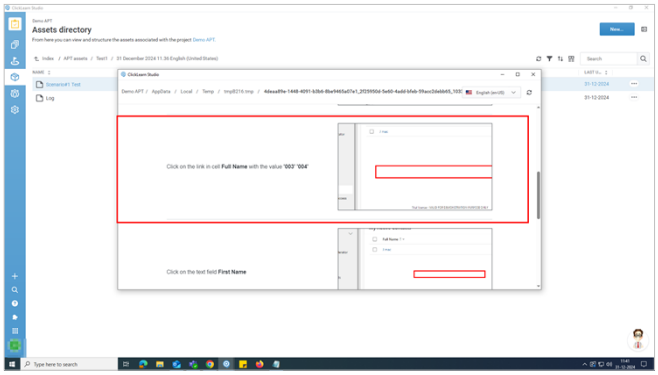
Click on the button **More** of grid cell **Action.**



Click on the menu item **Open.**



Once you click on the item Open, you will see a preview of the replay, where you can observe that the recorded steps do not match the replay shown.

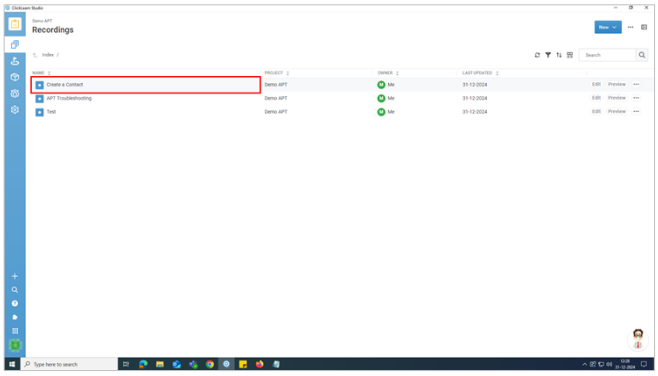


15.7.1.3. Replay Failed due to Incomplete Data or Missing Data

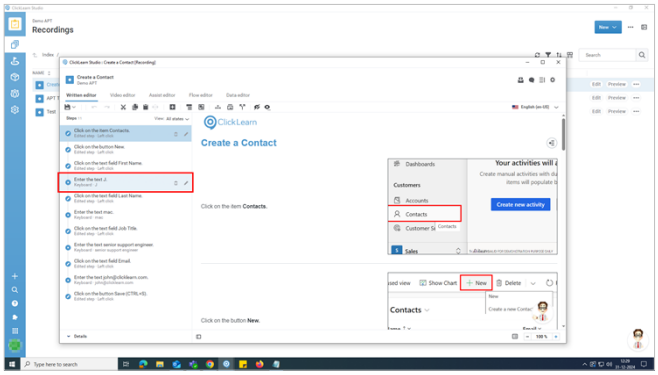
This occurs when the data entered during the recording or replay doesn't match what the system expects.

Let's say the recording entered **J Mac** as a contact name, but during the replay, you mistakenly left the name field blank or wrote a few letters of the name. The system might fail the test because it requires a valid name.

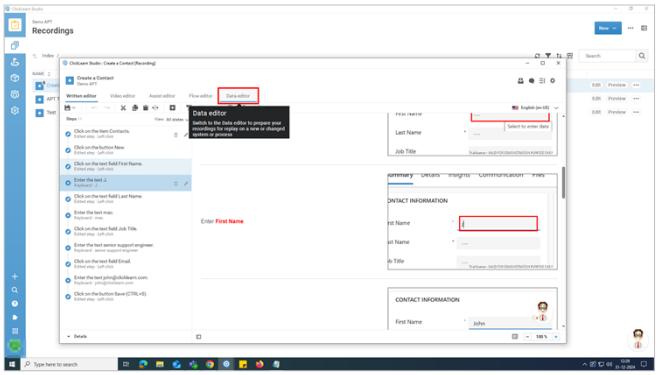
Double click on the gridview cell **NAME** with data **Create a Contact.**



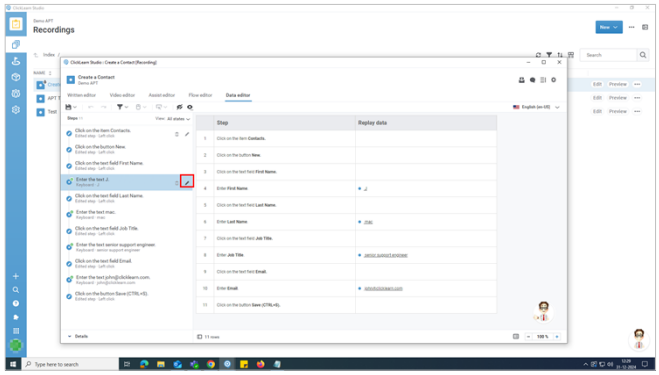
Click on the steps **Enter the text J.**



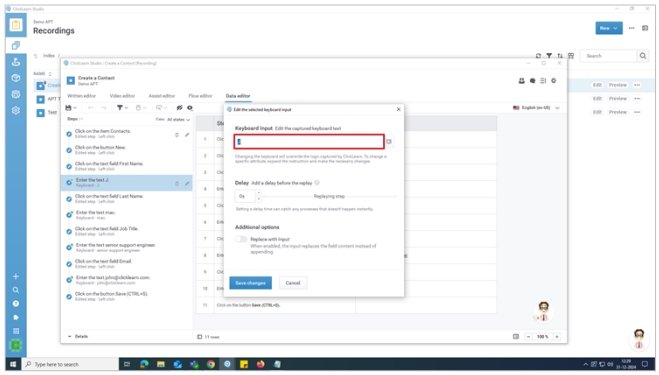
Click on the tab item **Data editor.**



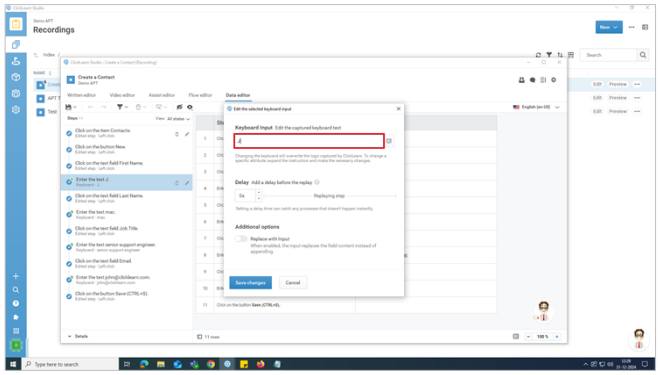
Click on the **Edit** icon of the step.



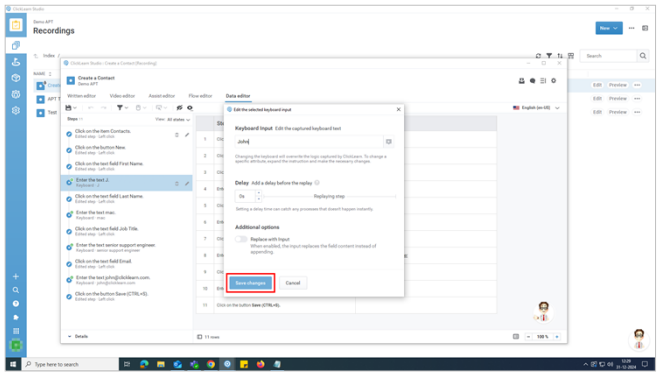
Click on the input textbox **Keyboard Input** with value **J**



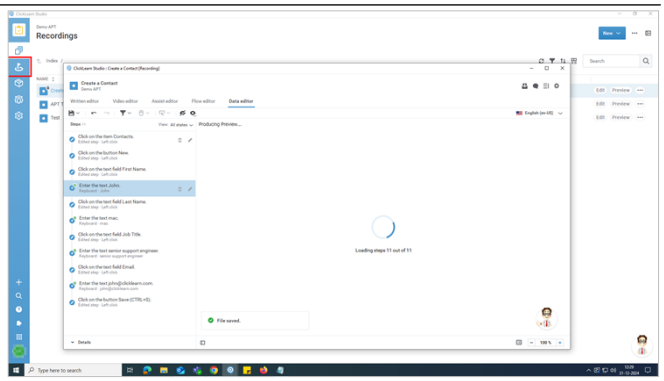
Enter **Keyboard Input**.



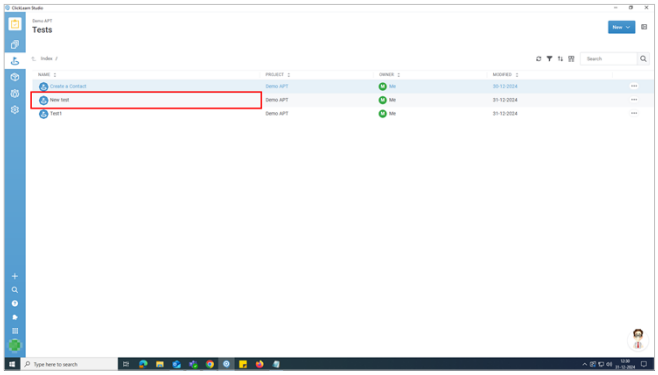
Click on the button **Save changes.**



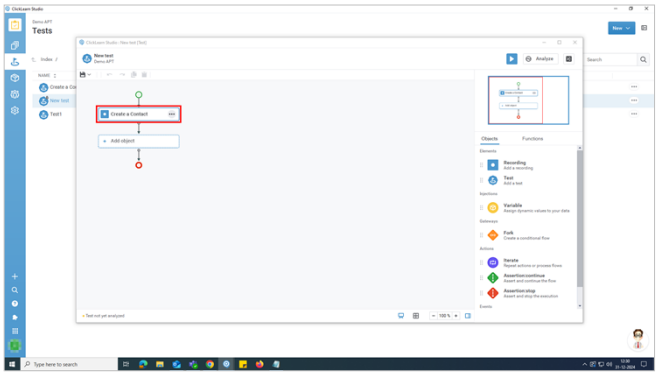
Click on the button **Tests.**



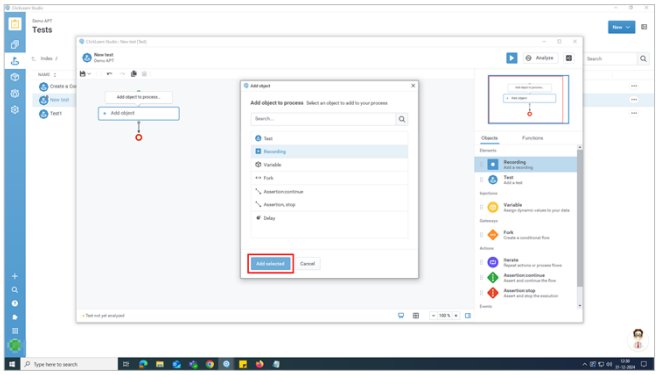
Double click on the gridview cell **NAME** with data **New test**



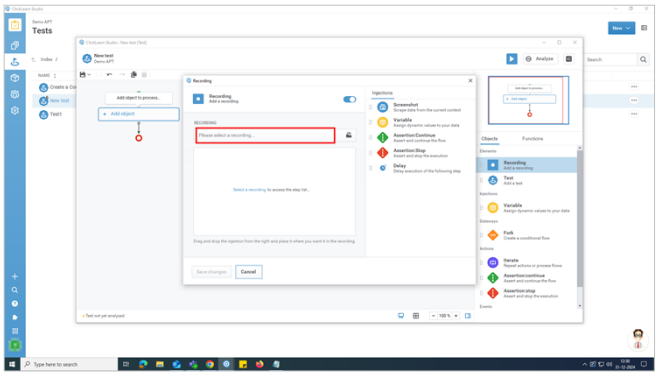
Click on the diagram element **Add Object.**



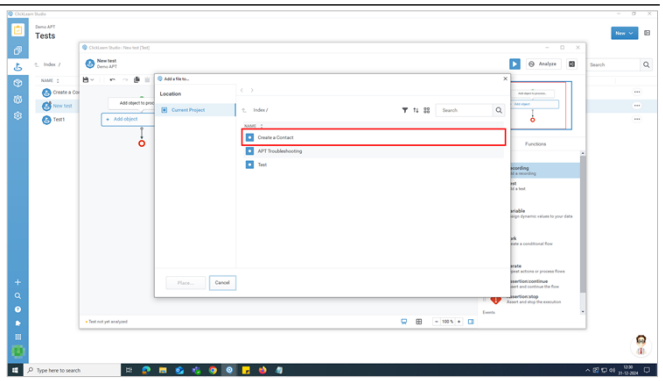
Click on the button **Add selected.**



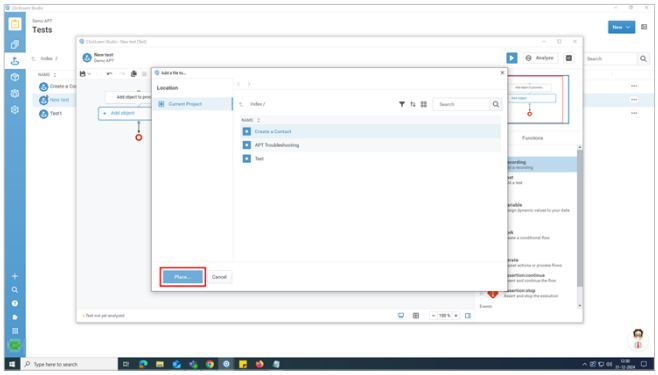
Click on the label **Please select a recording.**



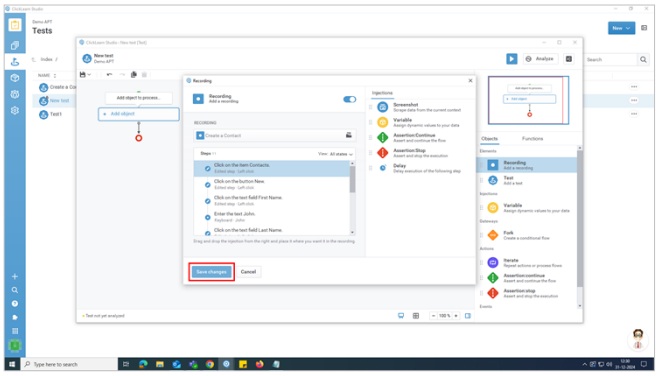
Click on the cell **NAME** with value **Create a Contact**



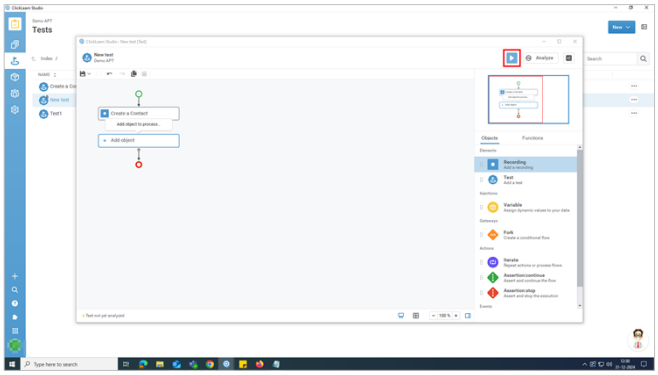
Click on the button **Place.**



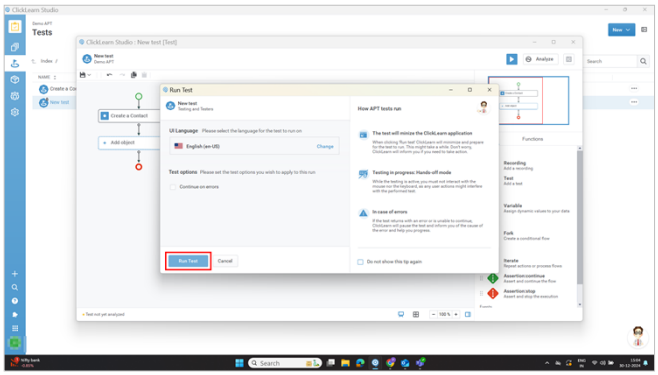
Click on the button **Save changes.**



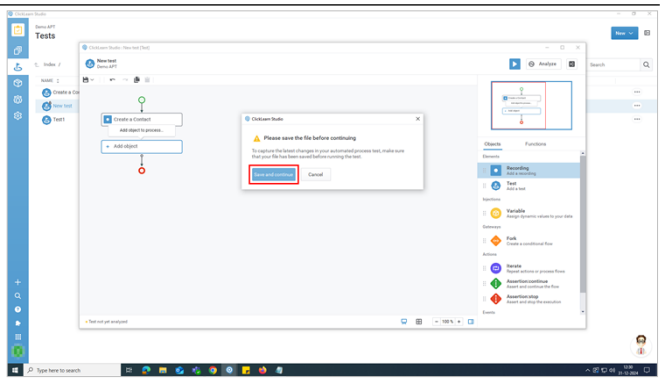
Click on the button **Run Test**



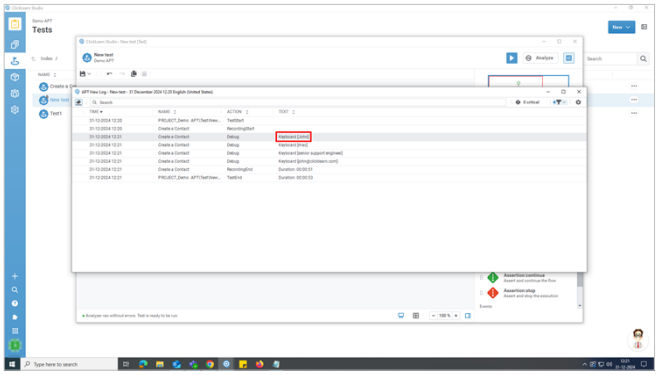
Click on the button **Run Test.**



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



Once you save and continue, a new dialogue box appears with the reflection of the correct data, whatever you changed in the data. Here, for example, the name **John** is updated.



16. Inside Help

16.1.What is Inside Help

Put context-aware help right inside Dynamics, so users get step-by-step guidance on the exact form, field, or page they're working on, without leaving the application to search for answers.

16.1.1. Introduction

Inside Help: You can document your fields, forms, and tables in an easy-to-use interface. You can integrate it with your recorded content and deploy it to the entire Dynamics platform.

Inside Help seamlessly helps you to incorporate walk-throughs. You can extend your built-in help system with your tailored content.

Editor allows you to add custom help to your forms, fields, and reports.

Enhance your content with automatic cross-references and improve user experience when navigating.

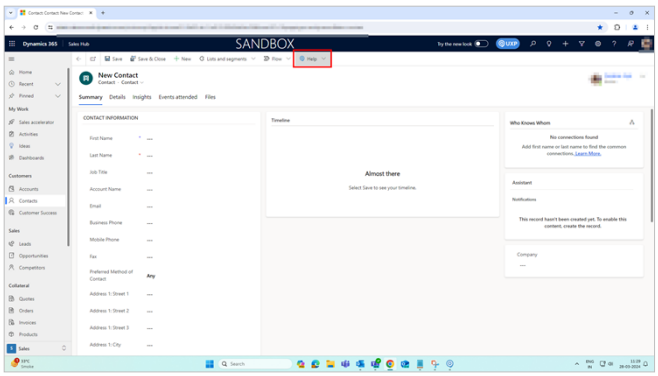
You can add your recorded ClickLearn processes to the help system. And ClickLearn will automatically cross-reference relevant content to your existing deployment, delivering enhanced experiences in your built-in help system.

16.1.2. Examples of Customer Engagement System for pages Contacts and Accounts

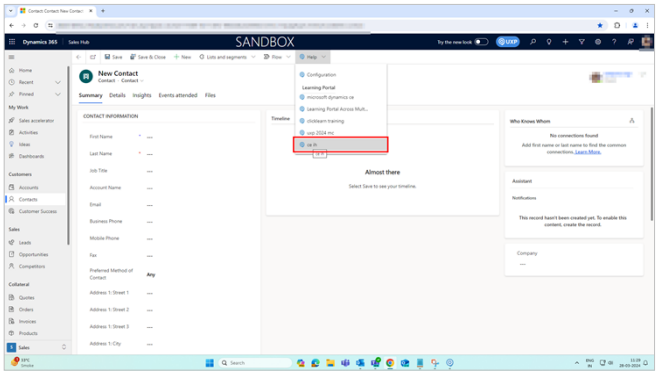
16.1.2.1. Inside Help: Contacts

Consider, for example, if you are on the Contacts page and require assistance with the "**Contacts**" menu item.

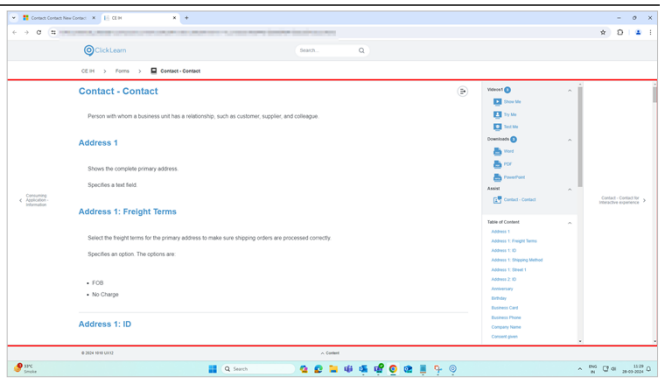
Inside Help is a resourceful guide in this scenario, providing step-by-step support tailored to the Contacts section to facilitate user navigation and understanding.
Click on the button **Help**.



Click on the menu item **ce ih**.

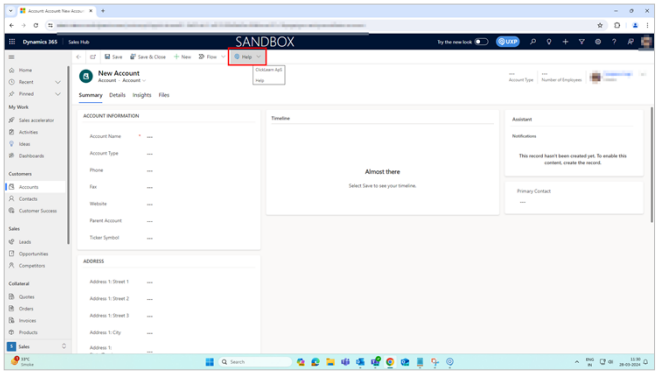


This redirects you to the recording related to Contacts.

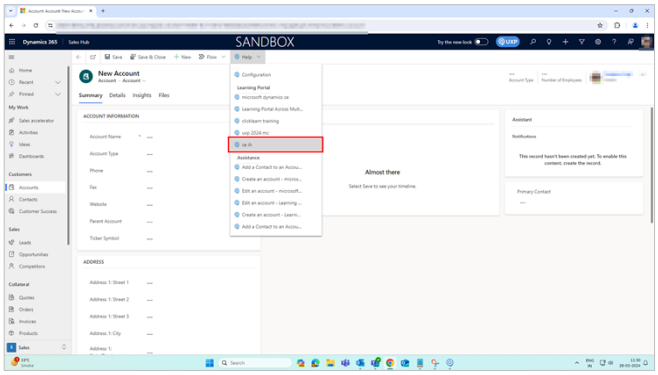


16.1.2.2. Inside Help: Accounts

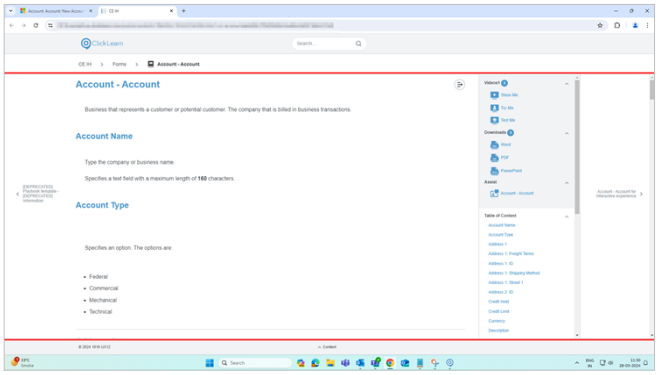
Similarly, this approach applies to all other menu items within the platform. Each section has a dedicated Inside Help feature that guides users through the functionalities and options available, ensuring a comprehensive understanding of the platform's features.
Click on the button **Help**.



Click on the menu item **ce ih**.



This redirects you to the recording related to Accounts.

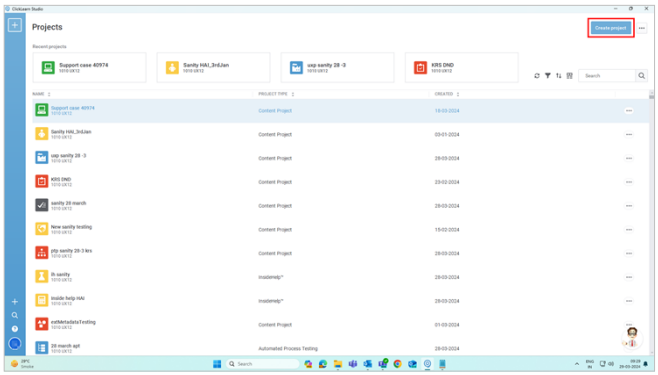


16.2.Set Up Inside Help

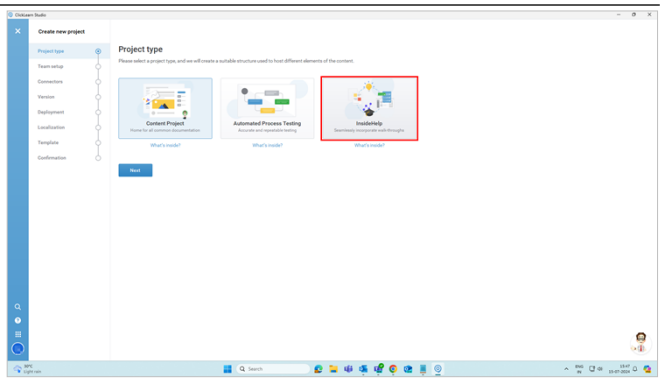
Connect straight to your Dynamics CE instance and pull in every entity and form, so you can document fields and deploy help built into your CRM, without recreating your data model by hand.

16.2.1. Steps to Create Inside Help Project

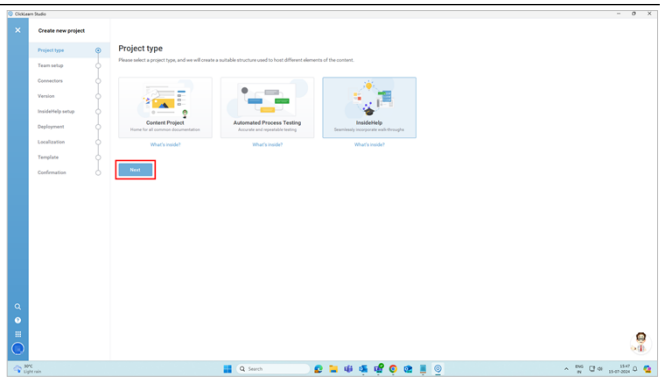
Click on the button **Create project**.



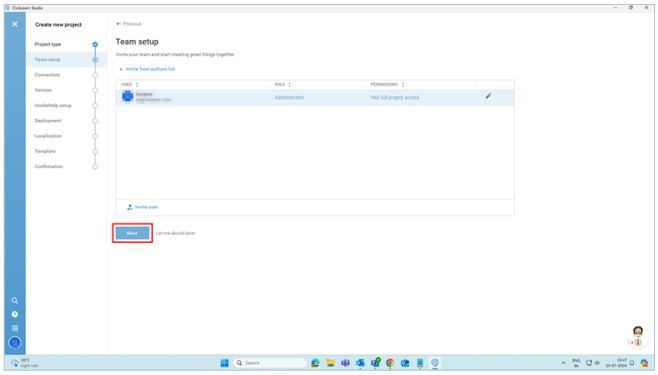
Click on the panel **Inside Help**.



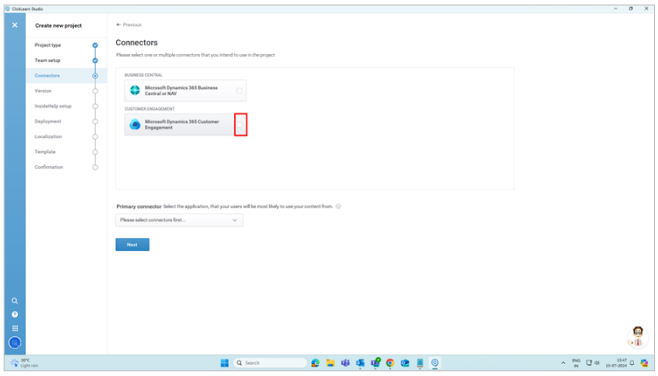
Click on the button **Next**.



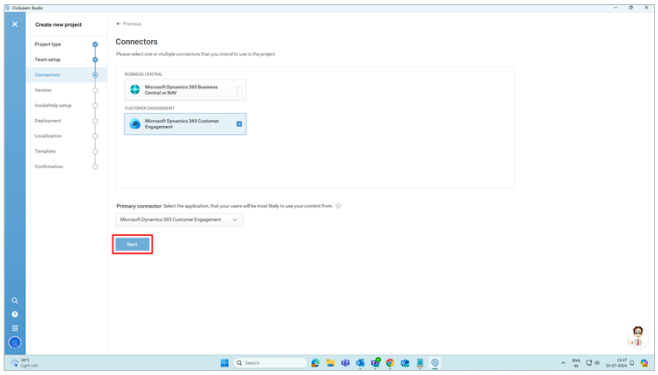
Click on the button **Next**.



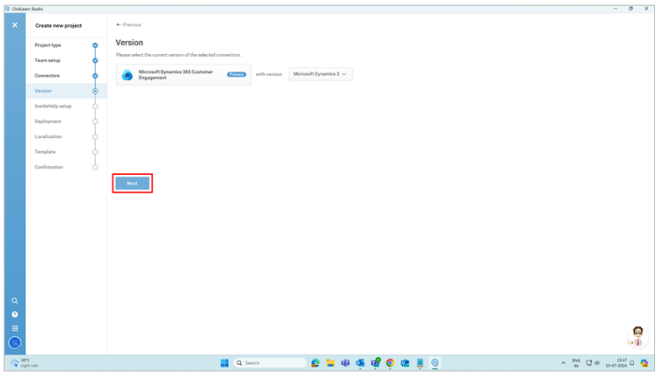
Click on the checkbox and select Microsoft Dynamics 365 Customer Engagement.



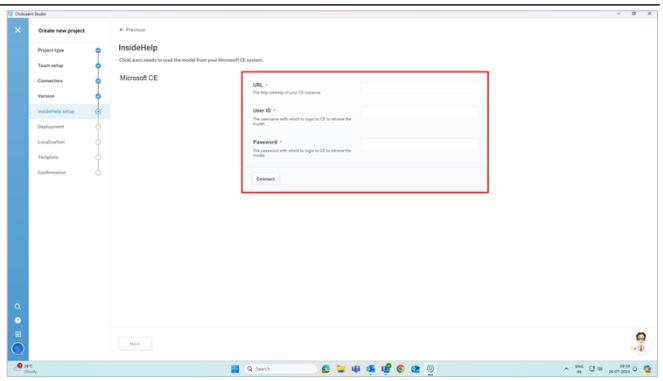
Click on the button **Next**.



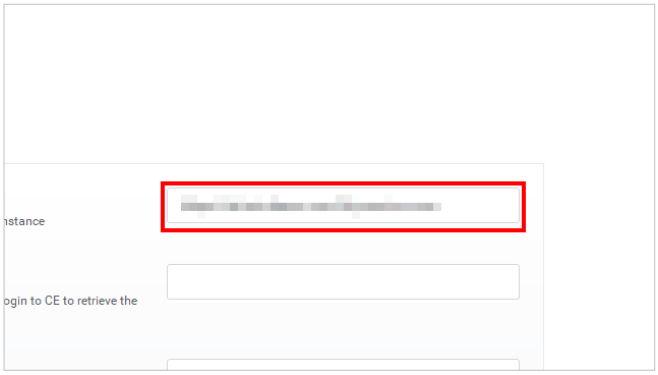
Click on the button **Next**.



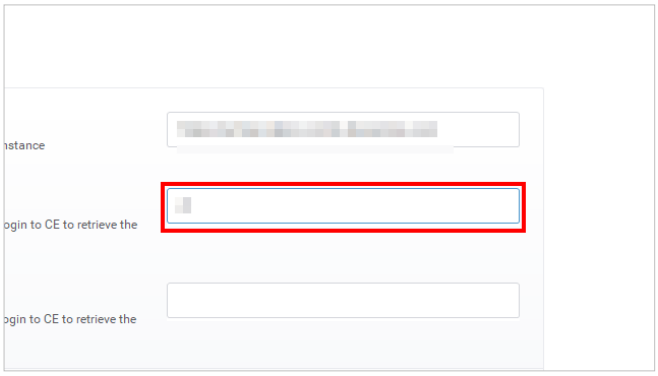
This opens up with the Inside Help panel.



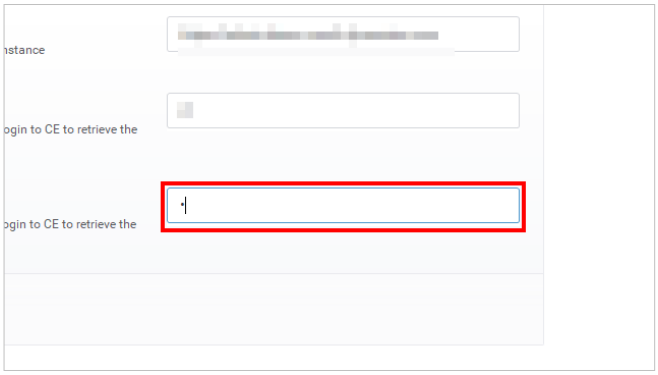
Click on the textbox **URL**. Enter the HTTP address of your CE instance.



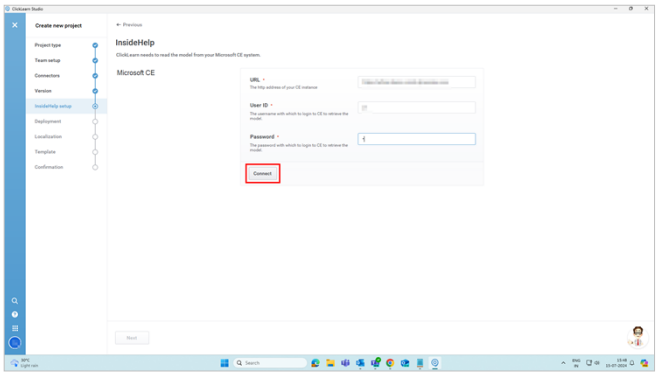
Click on the textbox **User ID**. Enter the user name to log in to CE to retrieve the model.



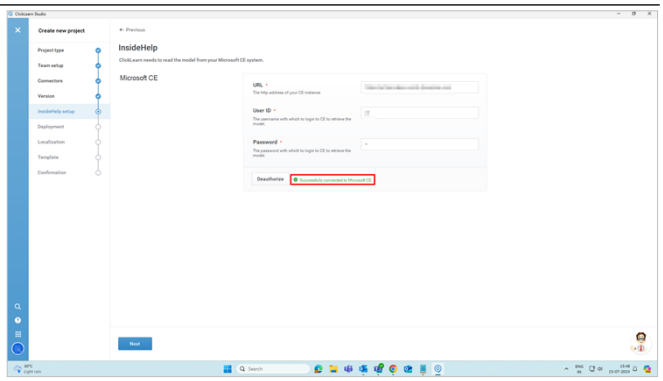
Click on the textbox **Password**. Enter the password to log in to CE and retrieve the model.



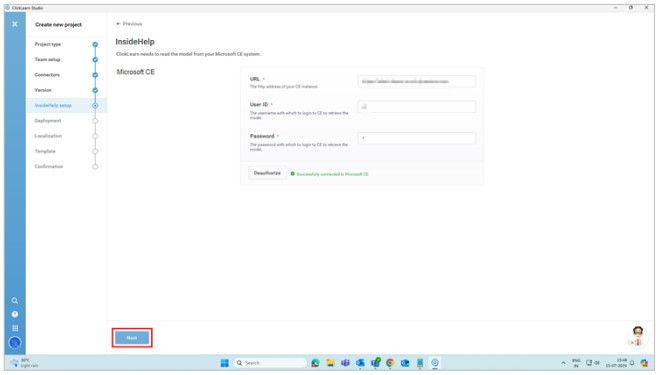
Click on the button **Connect**.



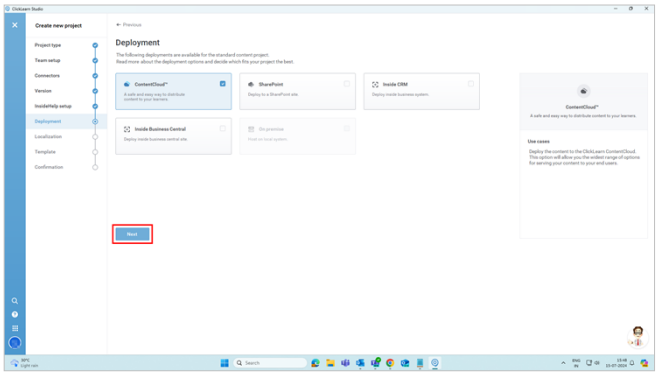
After successfully verifying the credentials, a message stating "**Successfully connected to Microsoft CE**" is displayed.



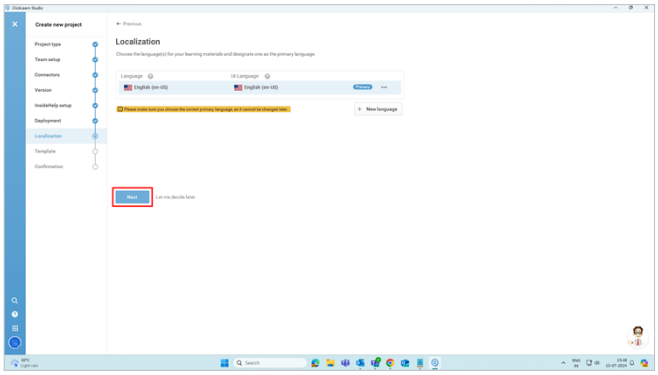
Click on the button **Next**.



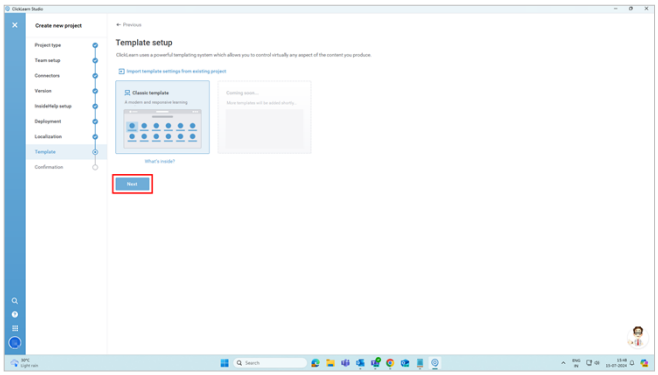
Click on the button **Next**.



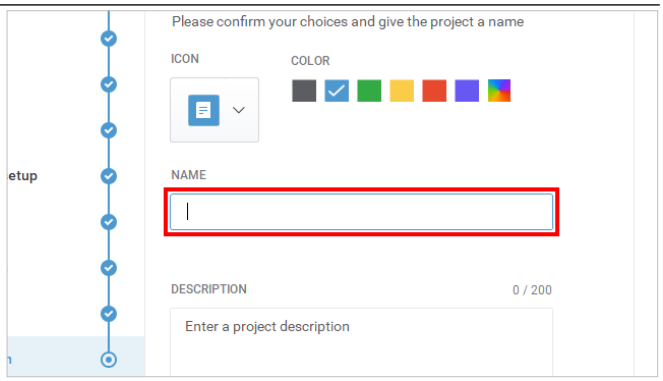
Click on the button **Next**.



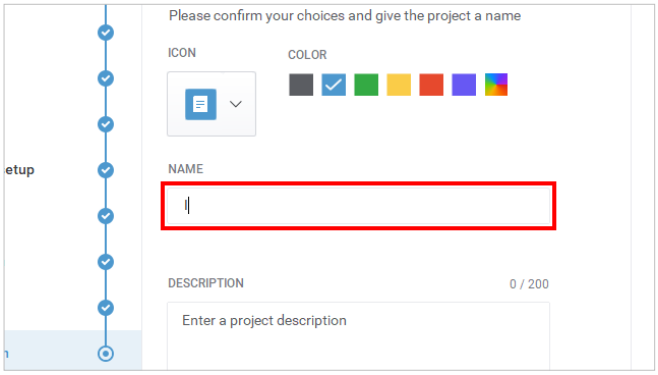
Click on the button **Next**.



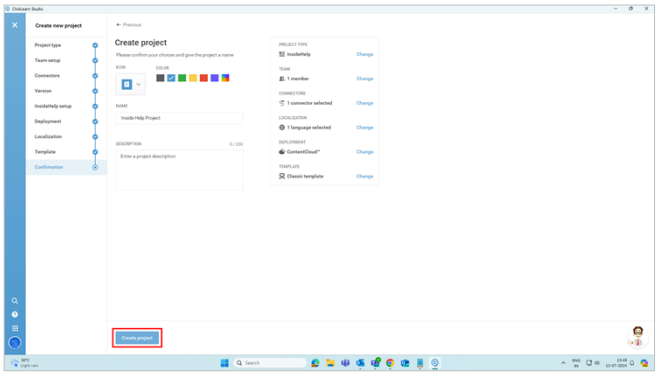
Click on the textbox **Project Name**.



Enter **Project Name**.



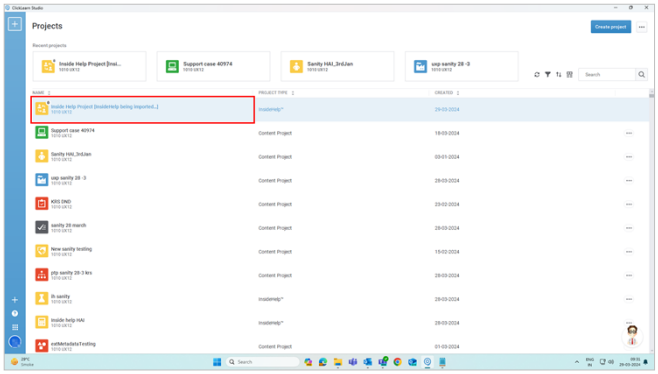
Click on the button **Create project**.



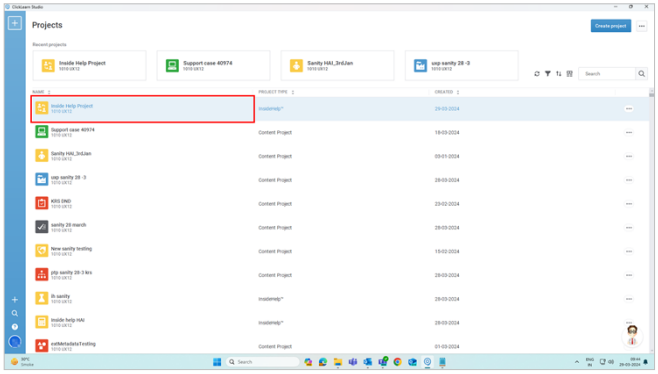
16.2.2. Detailed overview of the Inside Help project

Once you create the project, it is added as an **[Inside Help Project [InsideHelp being imported...].**

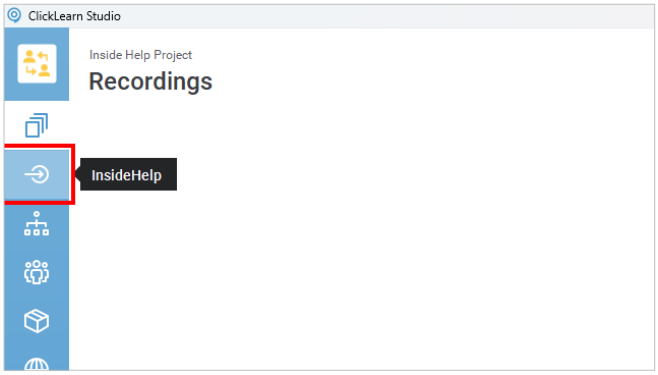
NOTE: The duration of the project import process may vary based on the project size. Larger projects may require additional time to import fully.



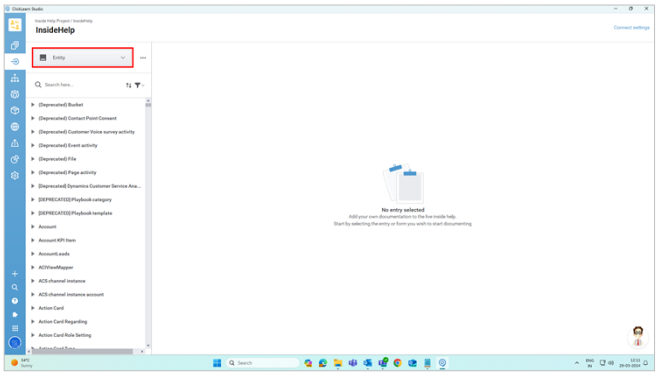
Once the project is ready, double-click on the grid cell **NAME** with the value **Inside Help Project.**



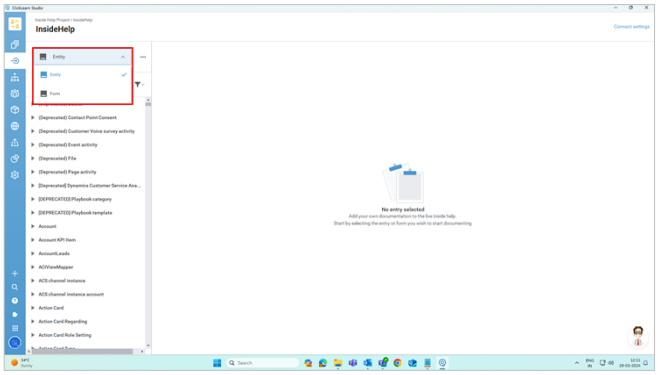
Click on the button **Inside Help**.



Click on the dropdown **Inside Help**.

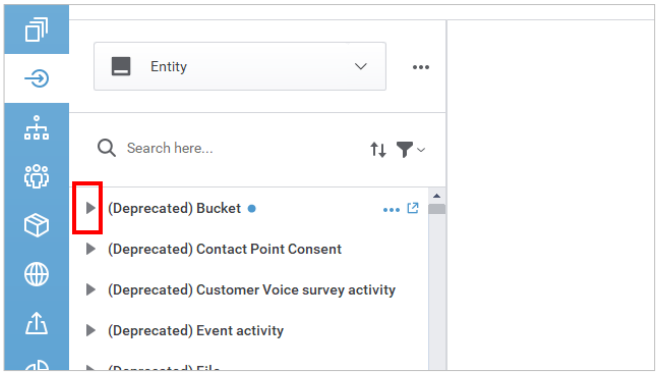


There are two options here: **Entity** and **Form**.

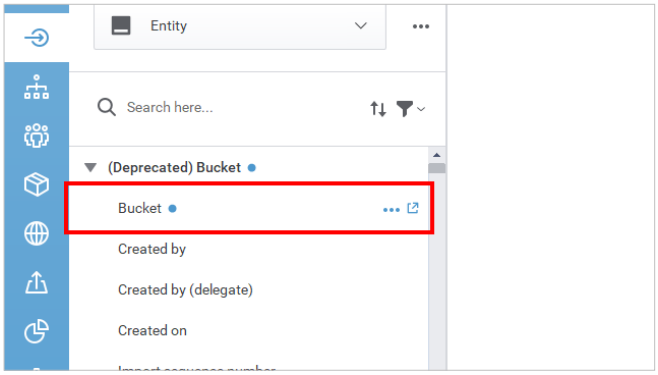


16.2.2.1. Edit an entity or form.

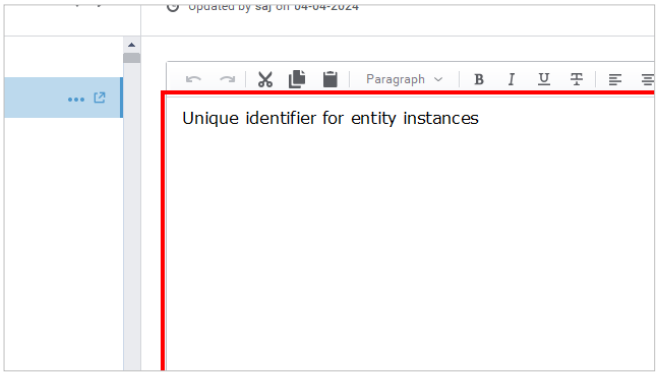
To edit an entity, click on the tree node expander.



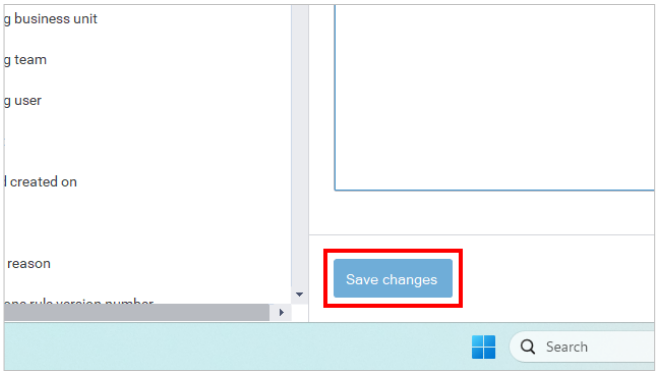
Click on the InsideHelp treenode **Bucket.**



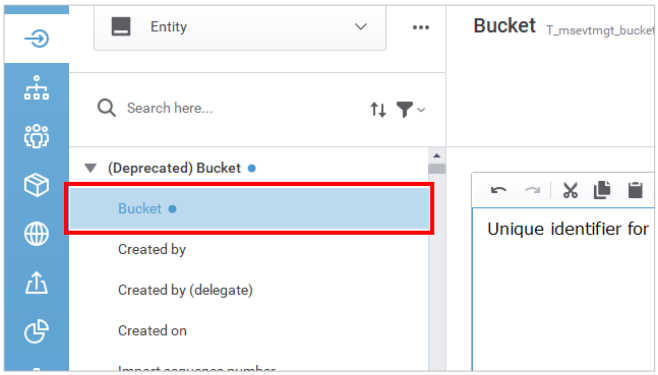
Click on the text editor **Content** to modify the content.



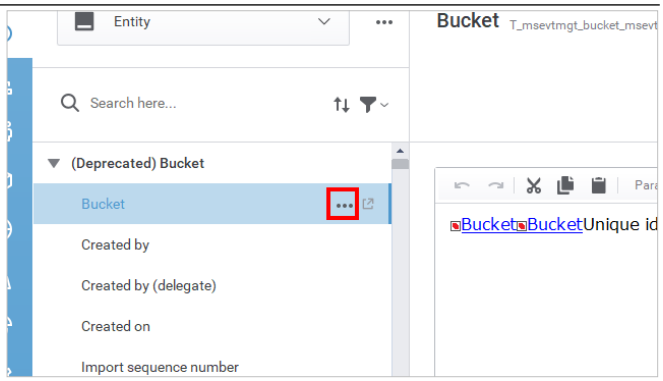
Click on the button **Save changes**.



Bucket: If you edit or modify an entity or form, a blue dot appears next to it, indicating changes have been made to the entity.



Click on the button.

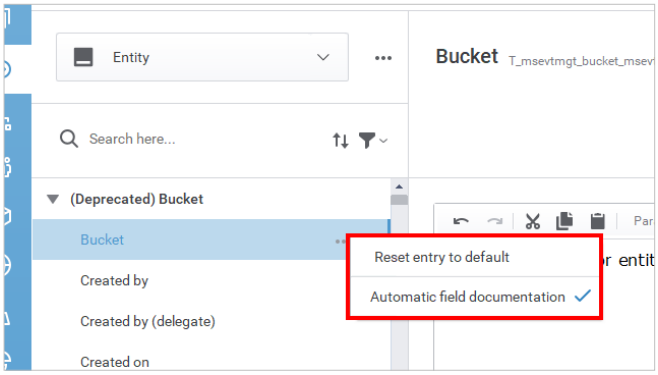


There are two options here:

Reset entry to default: If you edit or modify the entity, this will reset the value to default.

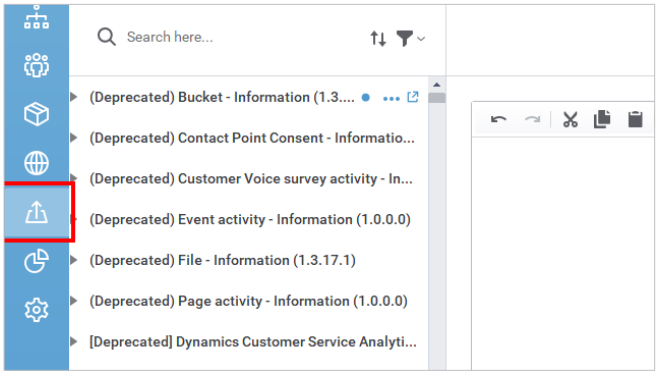
Automatic field documentation: This will automatically update the content once you produce and publish your project.

NOTE: The same functionality works when you select **Form**.

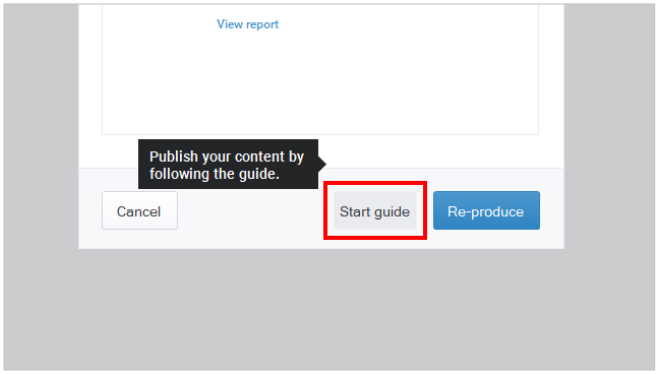


16.2.2.2. Publishing Settings

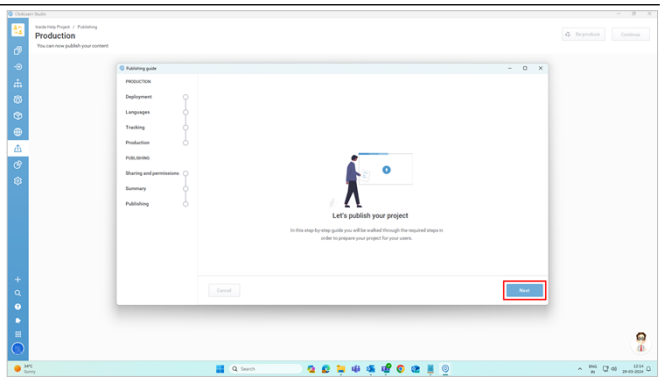
Click on the button **Publishing**.



Click on the icon: **Publish your content by following the guide.**

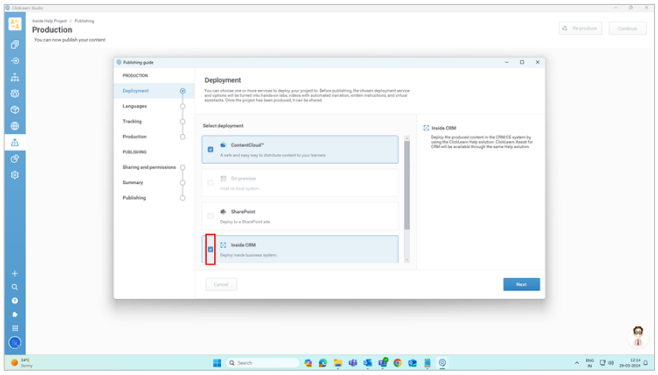


Click on the button **Next**.



Click on the checkbox to select the deployment option as Inside CRM.

NOTE: For the Inside Help project to integrate seamlessly with your CRM, it is essential to select '**Inside CRM**' as your deployment option. If this deployment option is not selected, the project will function as a standard recording, which **won't be integrated or accessible within your CRM system**.



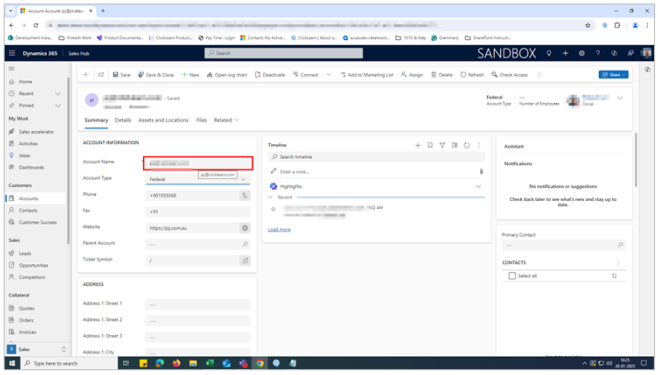
16.3.Use Inside Help via Browser Extension

Surface your Inside Help content right in the browser as users work, so the guidance you added to each form and entity appears exactly where they need it, without switching tools or hunting for the right page.

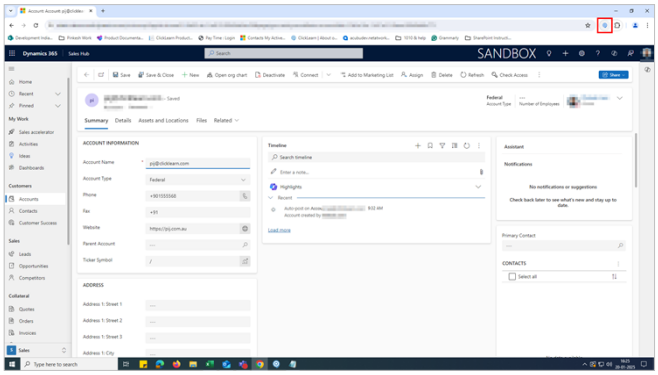
16.3.1. Introduction

Once you produce publish the Inside Help Project where you have edited forms and entities, you can see those changes through the extension User Experience Panel (**UXP**). Here are steps to see the reflected changes of the entity and form.

Click on **Account Name**.

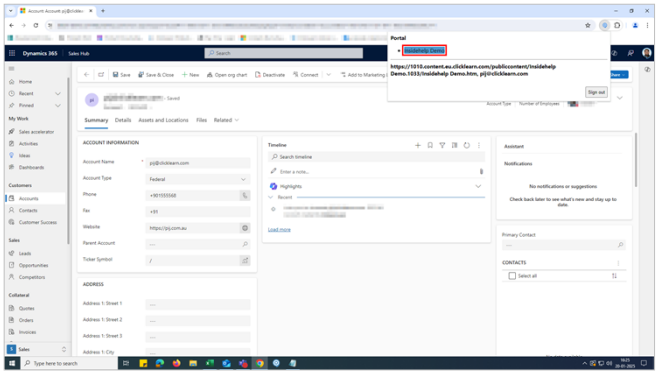


Click on **ClickLearn Assist Extension**.

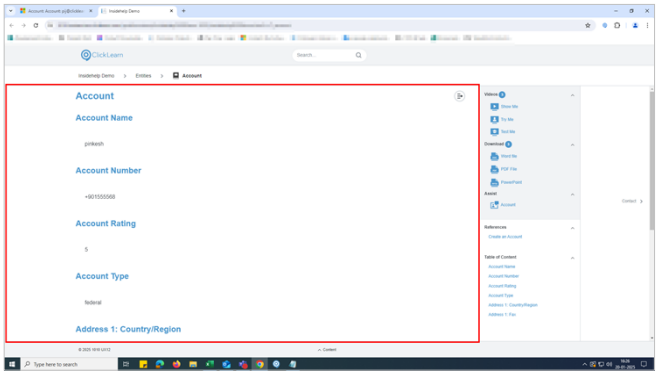


Click on **Insidehelp Demo**.

This is the name of a project that you set. For example, here, the project name is Insidehelp Demo.



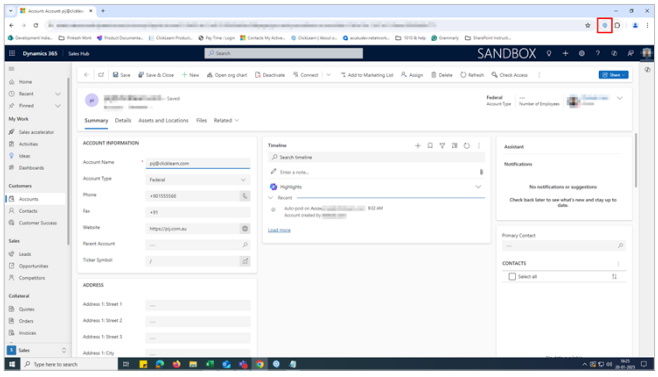
When you click on the project name in ClickLearn Assist Extension, you will be redirected to the specific step where you can review what you've added, whether it's in entity or form. For example, here you can see information added in the **entity Account**.



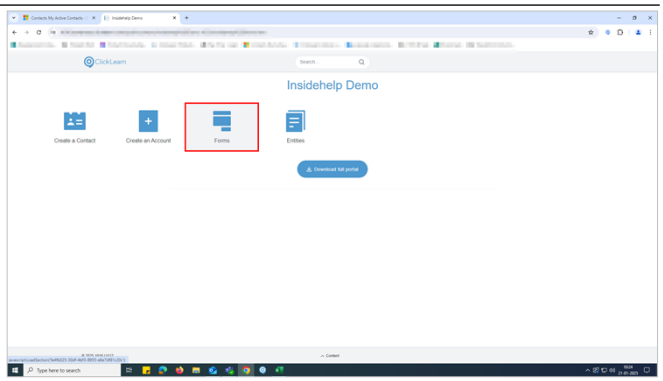
16.3.2. View Edited Forms or Entities

16.3.2.1. Forms

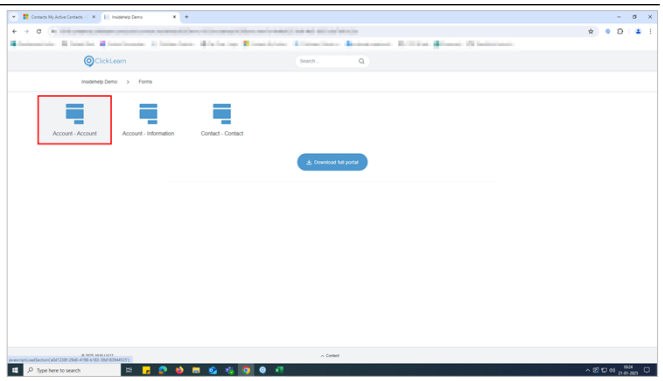
Click on **ClickLearn Assist Extension**.



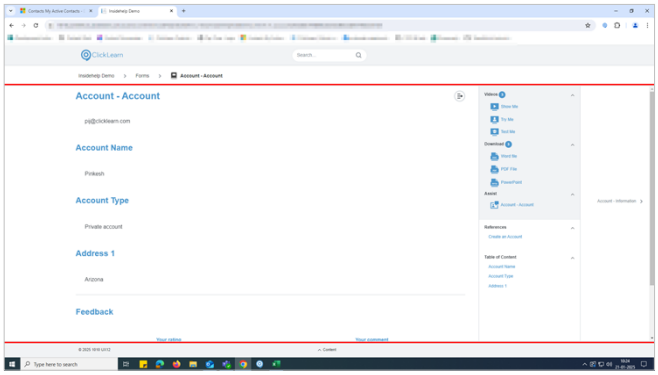
Click on the button **Forms**.



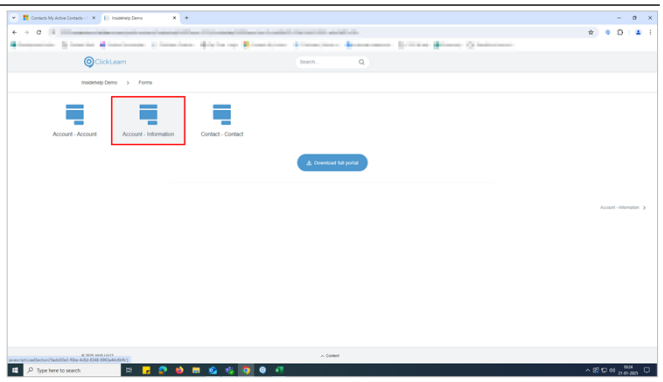
Click on the button **Account - Account.**



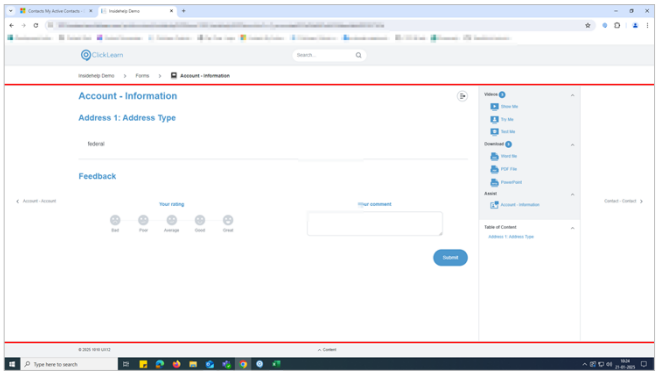
Here, you can view all the information you have entered in the forms.



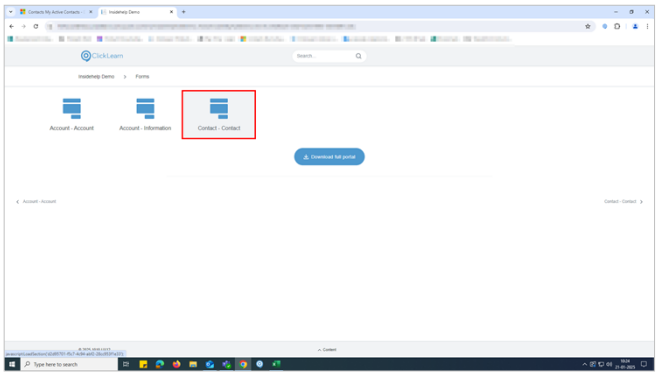
Click on the button **Account - Information.**



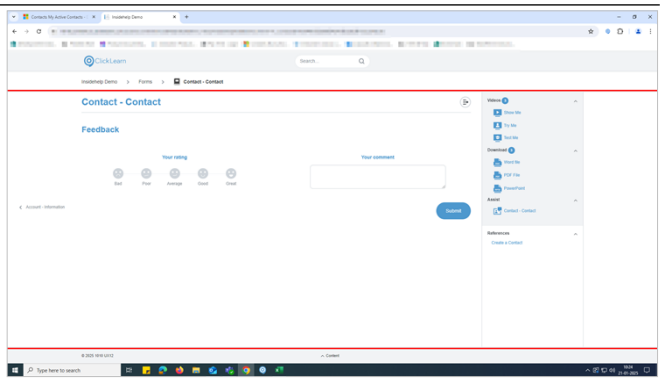
When you click on Account-information, you will see all the information you have added.



Click on the button **Contact - Contact.**

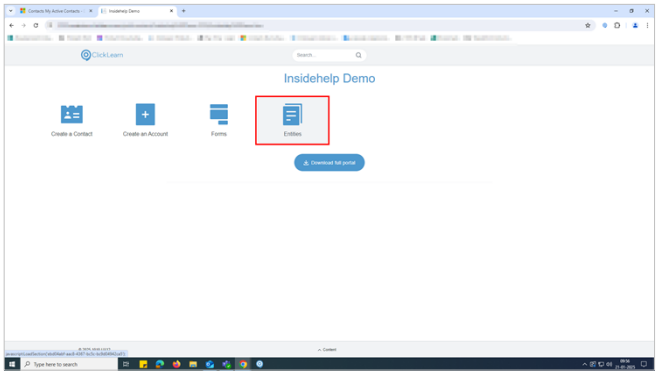


This will not display anything because no details have been added for the forms in this section.

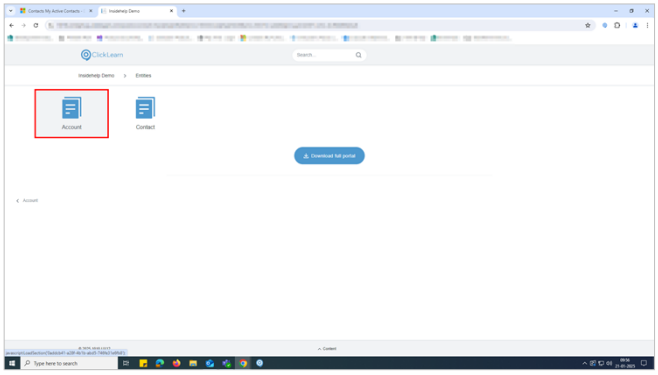


16.3.3. Entities

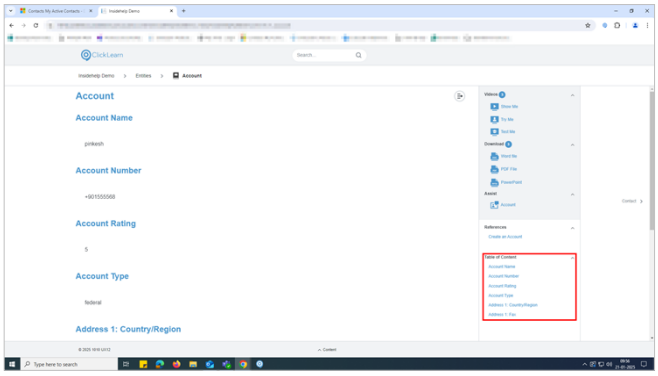
Click on the button **Entities**.



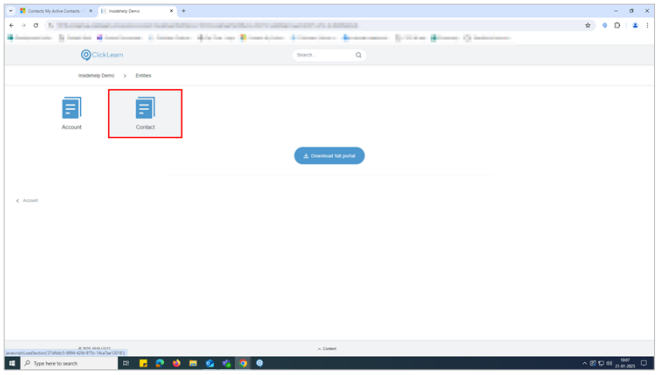
Click on the button **Account**.



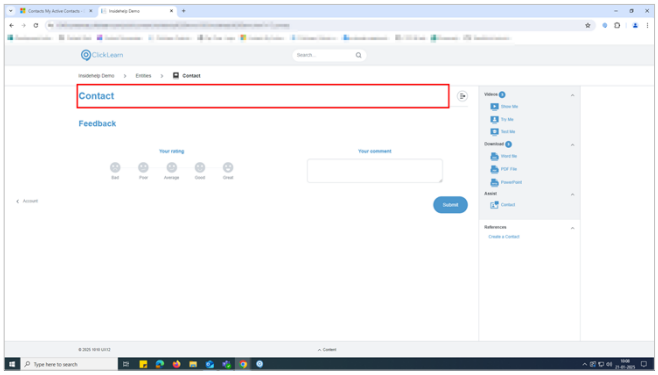
After clicking on the **Account entity**, you will be redirected to the account section where you have added details such as Account name, Account number, Account rating, and other information.



Click on the button **Contact.**



This is how the **Contact entity** appears. There is no information because no details have been added to the Contact section.

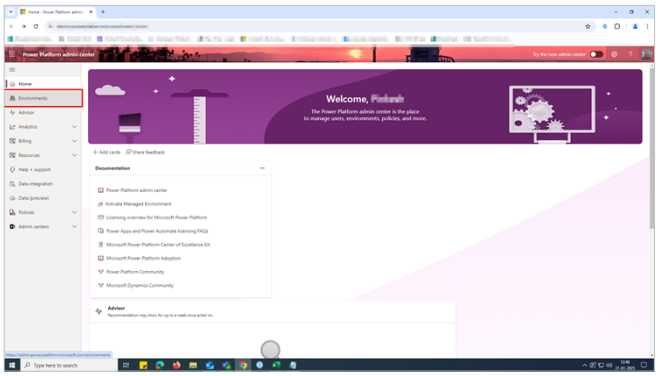


16.4.Inside Help Multi Tenant set up - CE

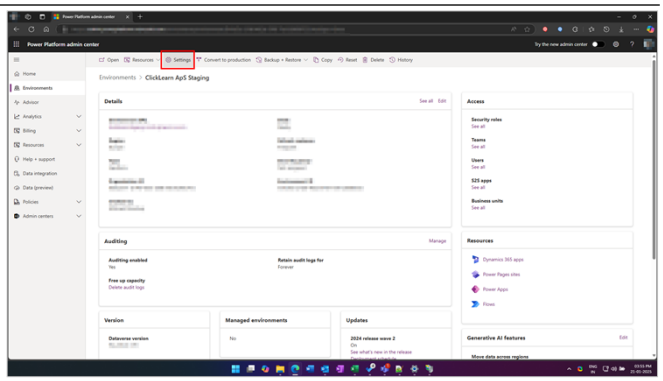
Connect Inside Help across multiple tenants with a single application user, so one secure, role-based login retrieves the model from each CE instance, without managing separate credentials for every environment.

16.4.1. Create Application User

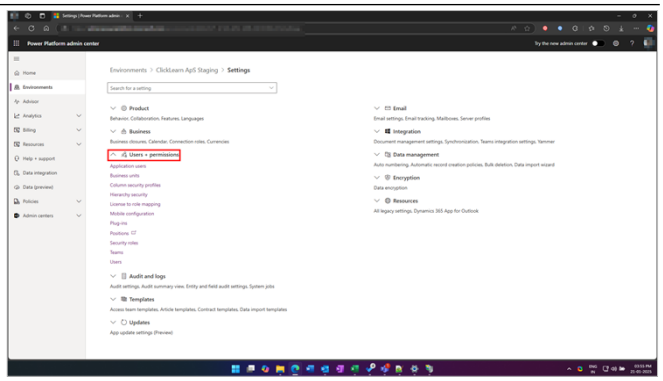
Click on the button **Environments.**



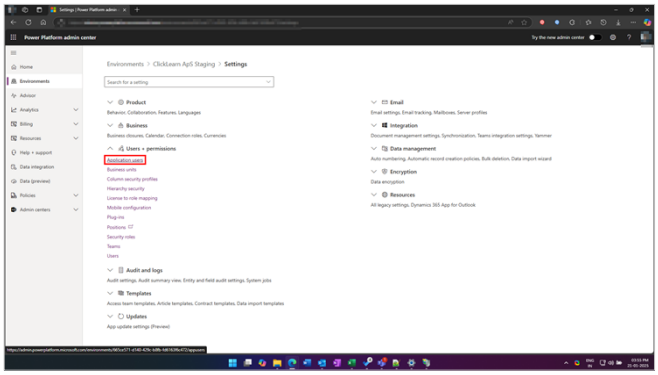
Click on the button **Settings.**



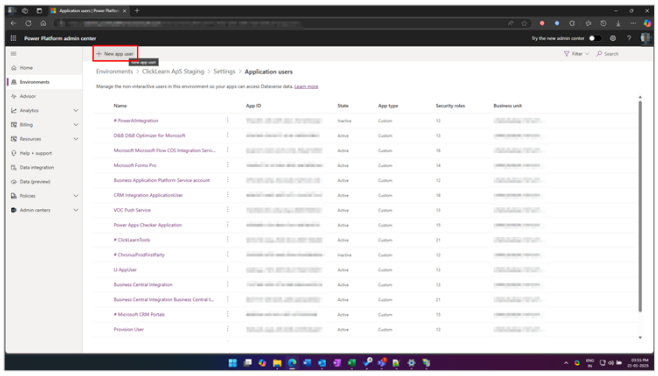
Click on the button **Users+ Permission**.



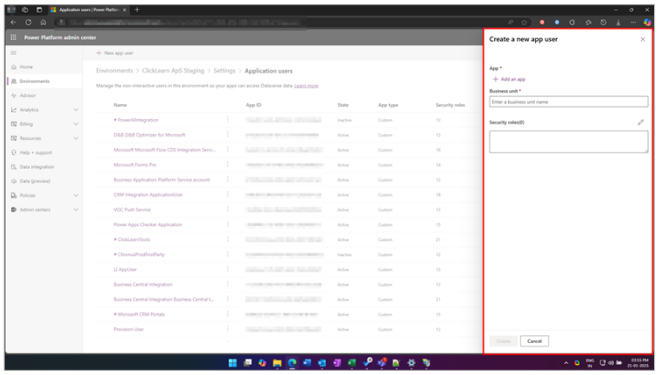
Click on **Application Users**.



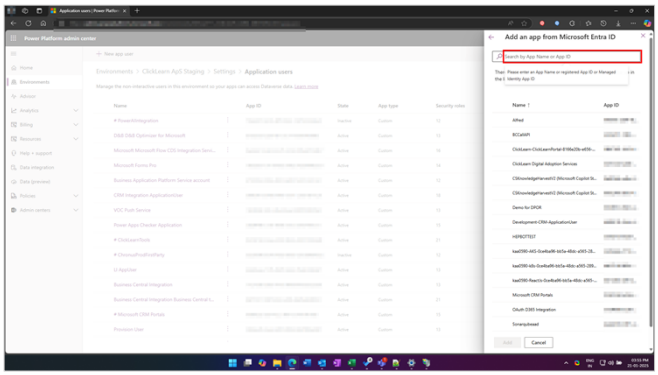
Click on **New app user**.



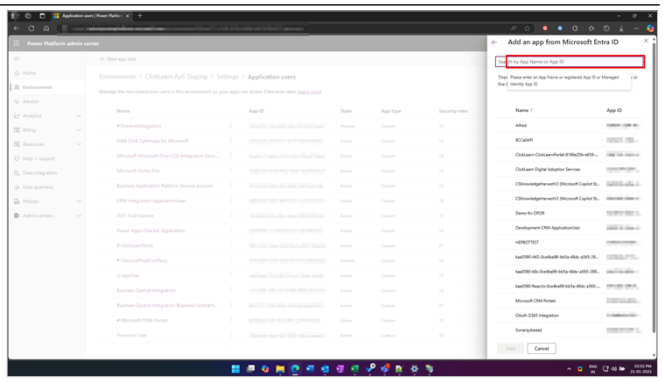
Once you click on new app user, a new pop-up will appear, asking for your application ID, business unit, and security role.



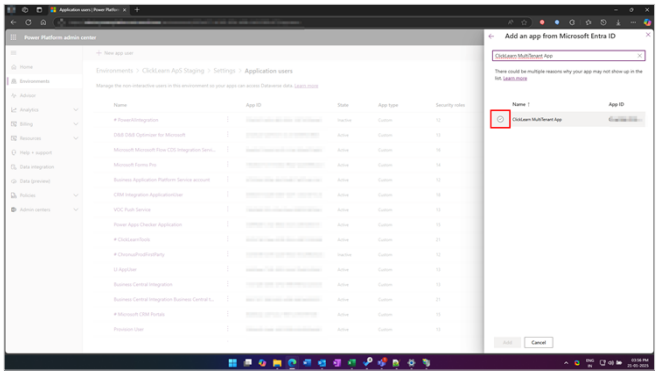
Click on the input field **Search by App Name or App ID.**



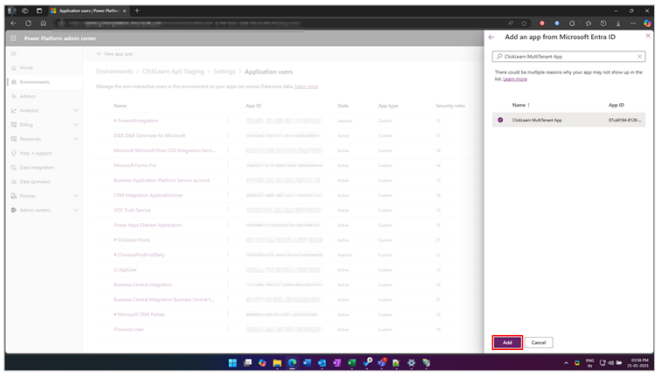
Enter **Search by App Name or App ID**.



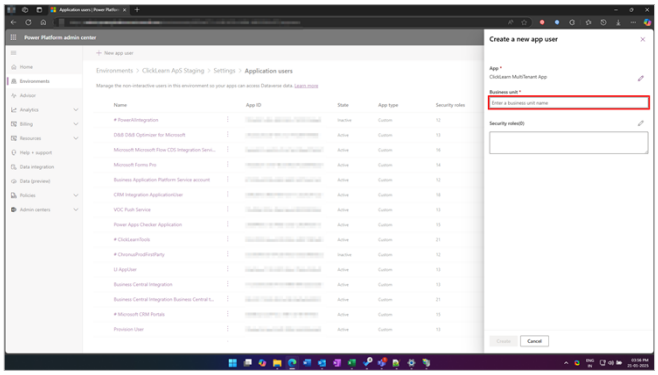
Click on **MultiTenant App.**



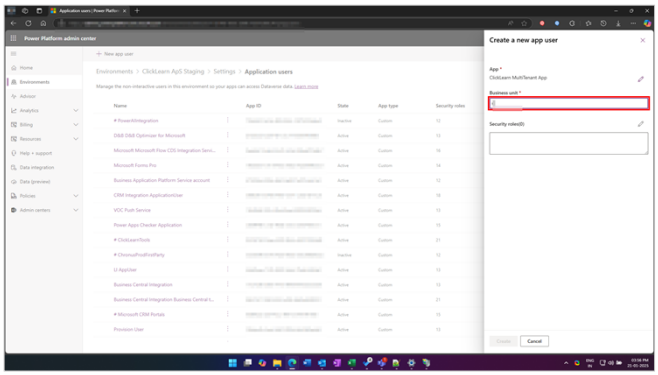
Click on the button **Add.**



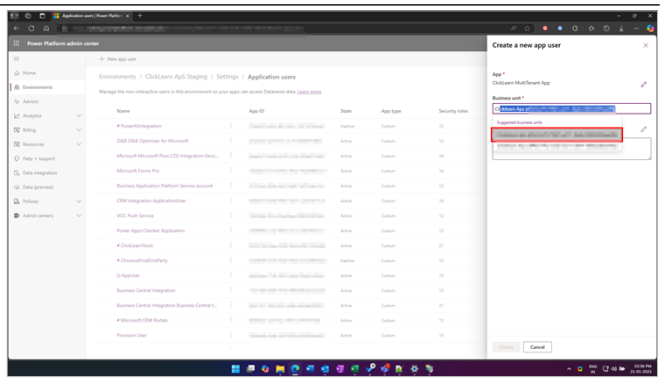
Click on the input field **Enter a business unit name.**



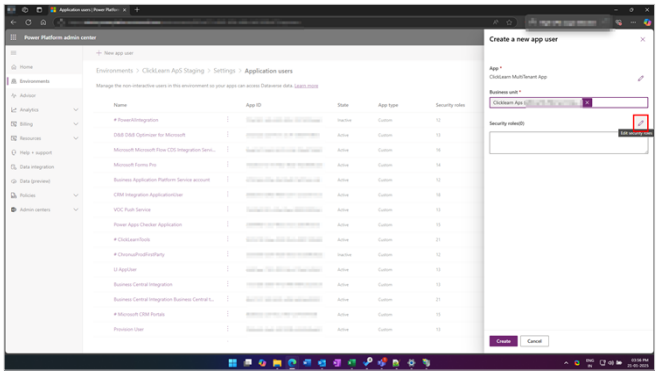
Enter **Enter a business unit name**.



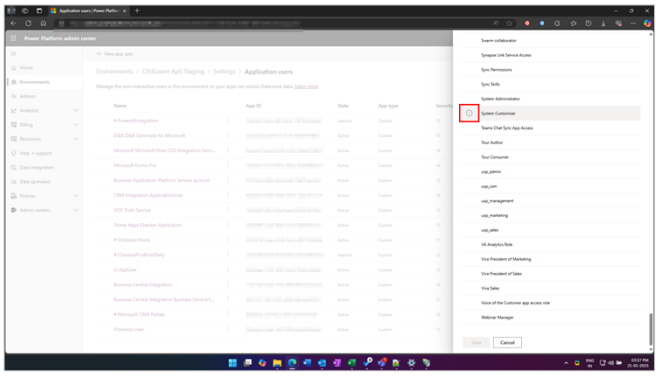
Click on the button **Clicklearn Aps (efb1ce79-79b7-ec11-8aa5-0022489eedf6)**



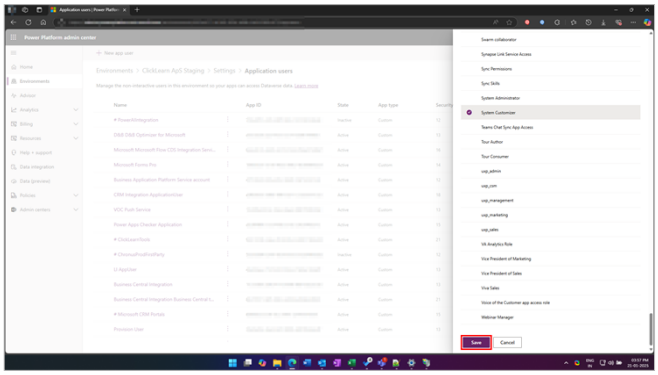
Click on the button **Edit security roles.**



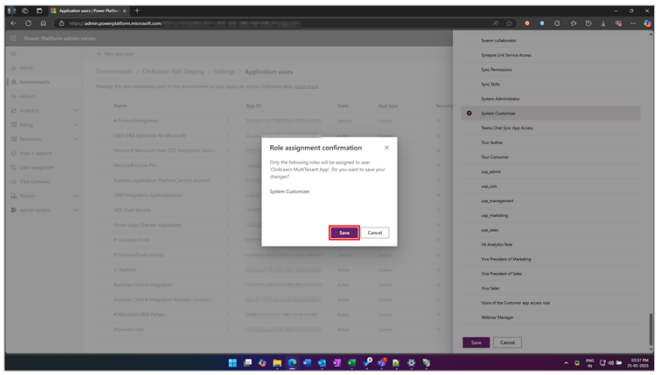
Click on **System Customizer.**



Click on the button **Save.**

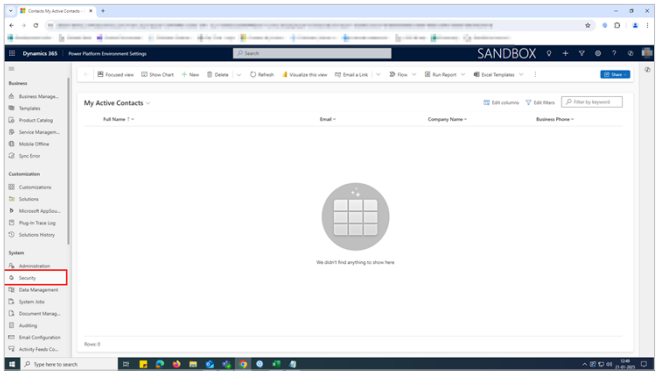


Click on the button **Save**

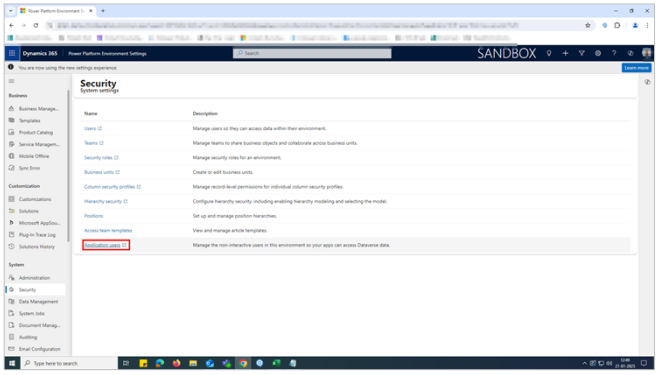


16.4.2. Assign Security Role

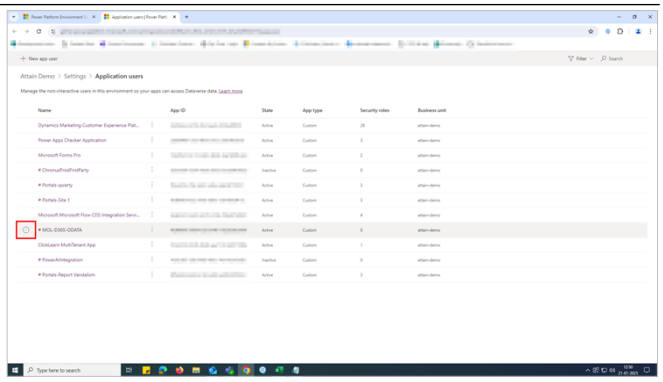
Click on the item **Security.**



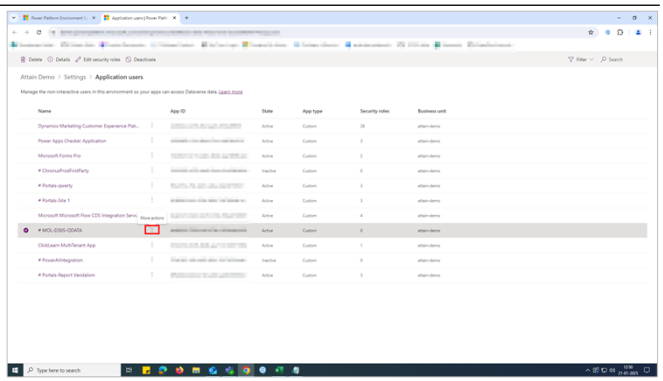
Click on the button **Application users.**



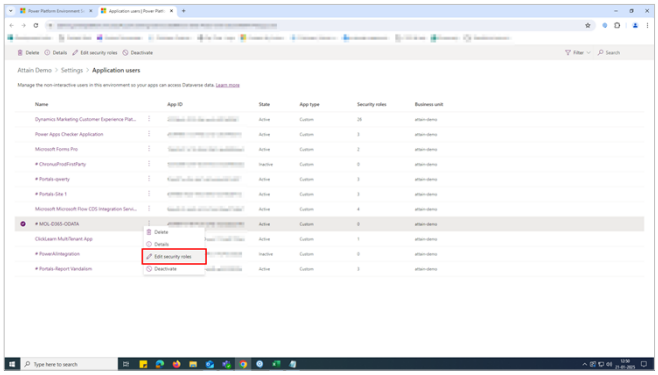
Select the **application user**.



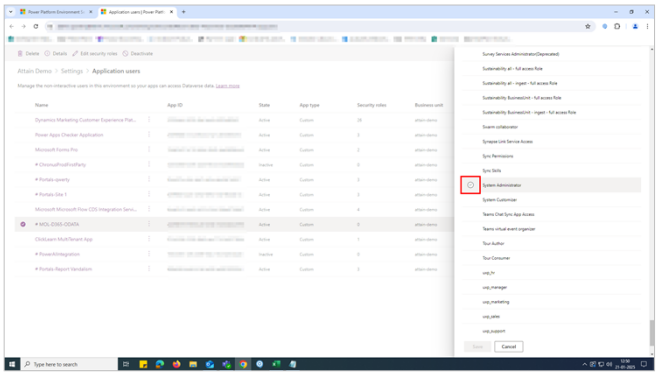
Click on the button **More actions.**



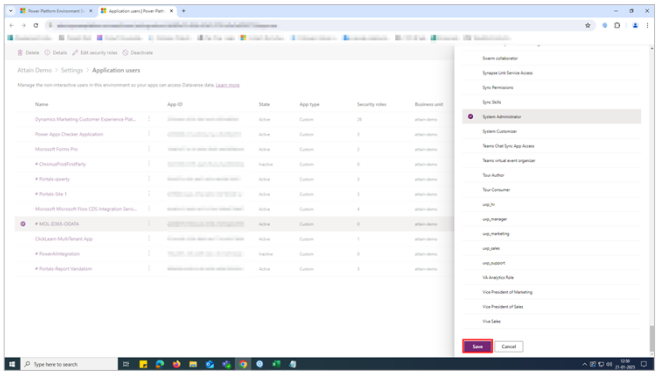
Click on the button **Edit security roles.**



Select the **application security role**.
Minimum role required is '**System Customizer**'

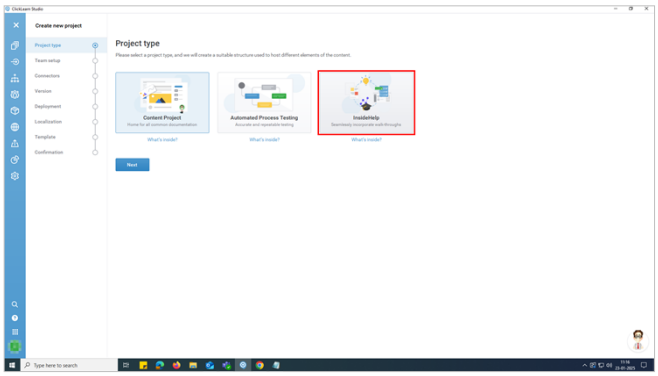


Click on the button **Save.**

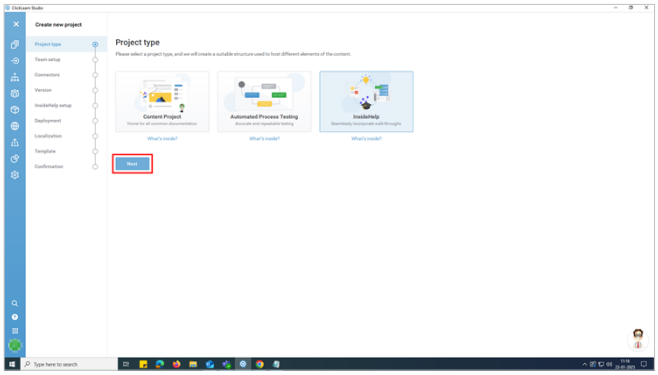


16.4.3. Inside Help Multi-Tenant User Login

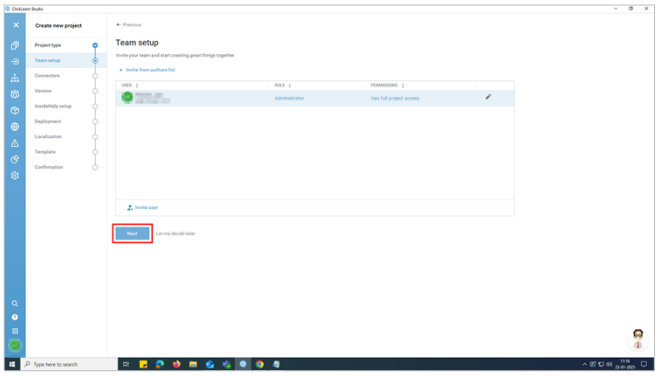
Click on the panel **Inside Help.**



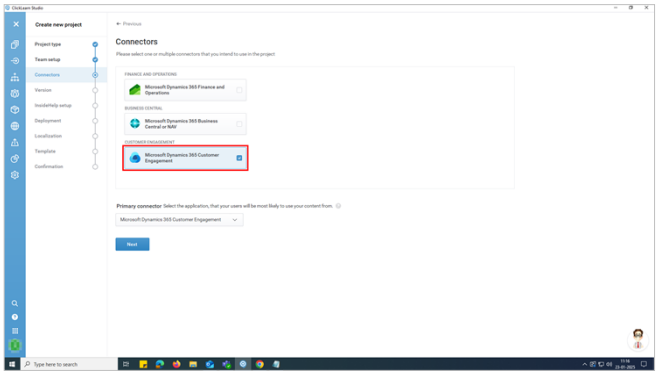
Click on the button **Next.**



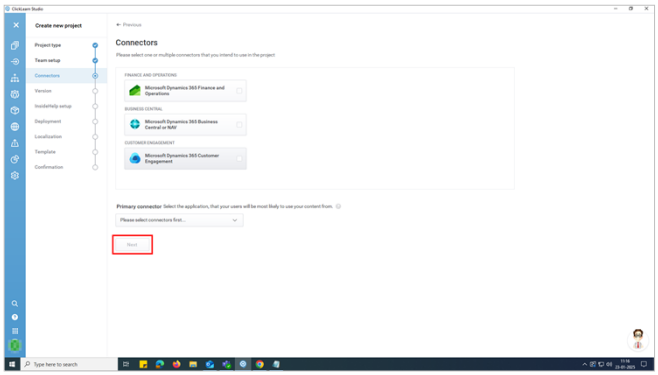
Click on the button **Next.**



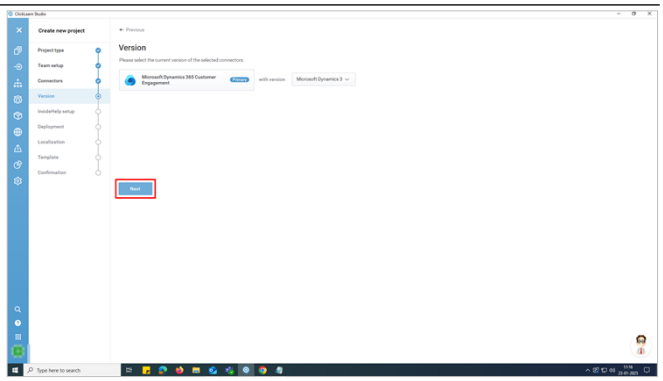
Click on the list item **Microsoft Dynamics 365 Customer Engagement.**



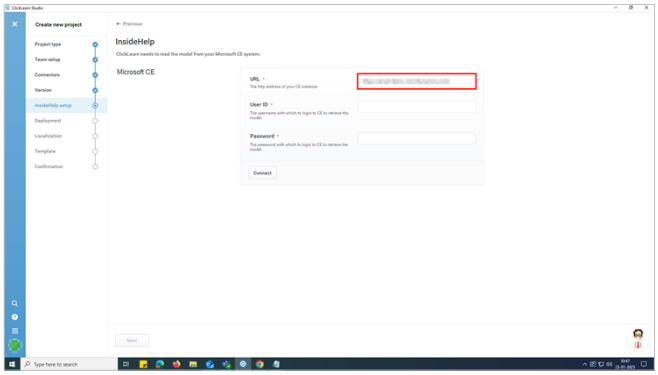
Click on the button **Next.**



Click on the button **Next.**

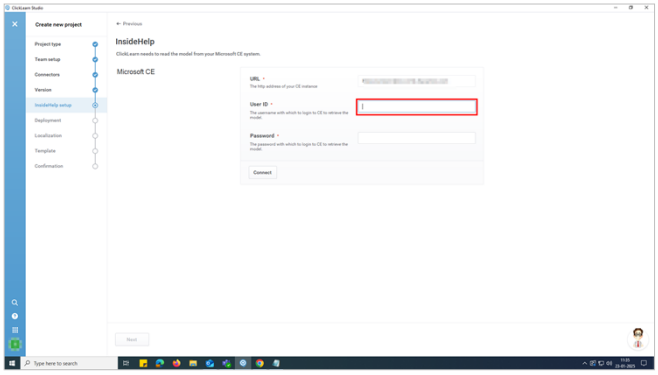


Click on the textbox **URL**. Enter the HTTP address of your CE instance.

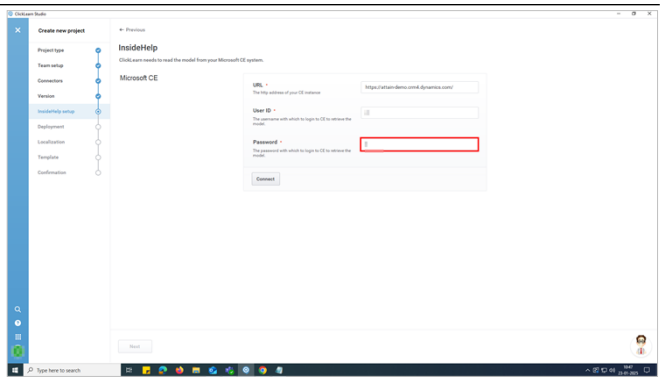


The user id is **cl** and for password you can just type the spacebar once.

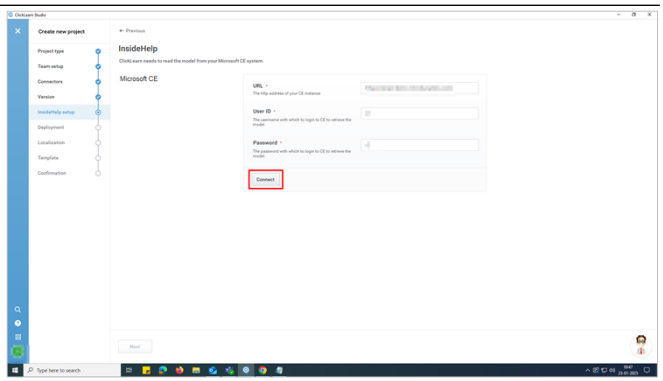
Click on the textbox **User ID**. Enter the user name to log in to CE to retrieve the model.



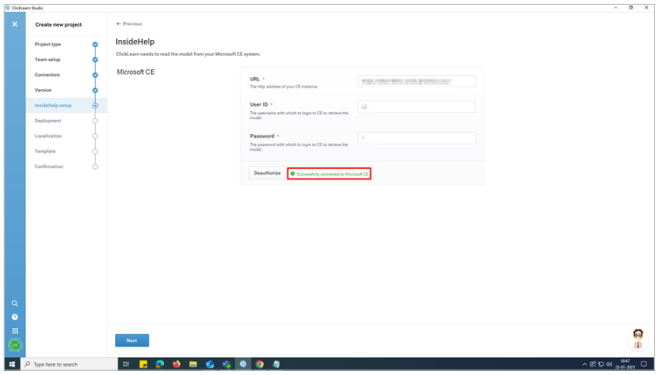
Click on the textbox **Password**. Enter the password to log in to CE and retrieve the model.



Click on the button **Connect.**



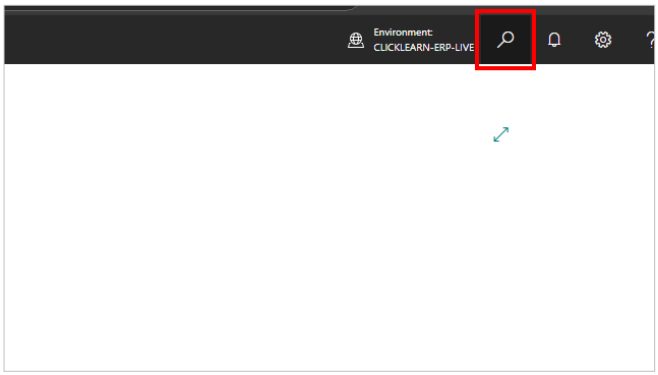
After successfully verifying the credentials, a message stating "**Successfully connected to Microsoft CE**" is displayed.



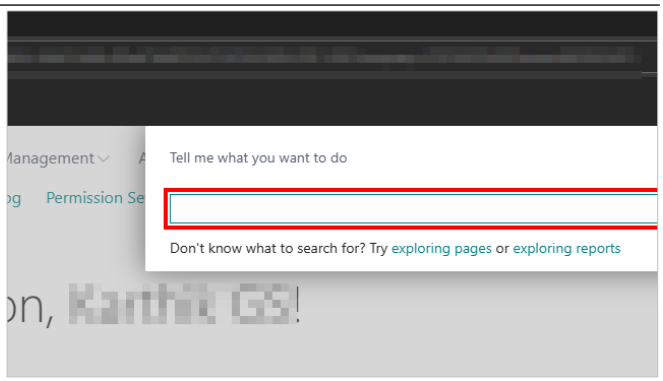
16.5.Inside Help Multi Tenant set up - BC

Set up Inside Help for Business Central across tenants with one Entra registration, so a single admin-approved connection pulls in your objects automatically, without configuring each company separately.

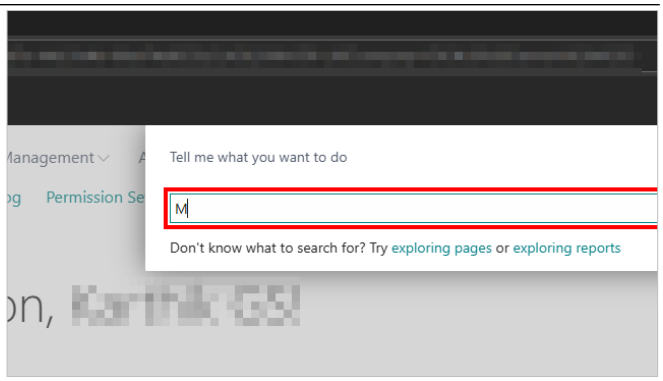
Click on the search button



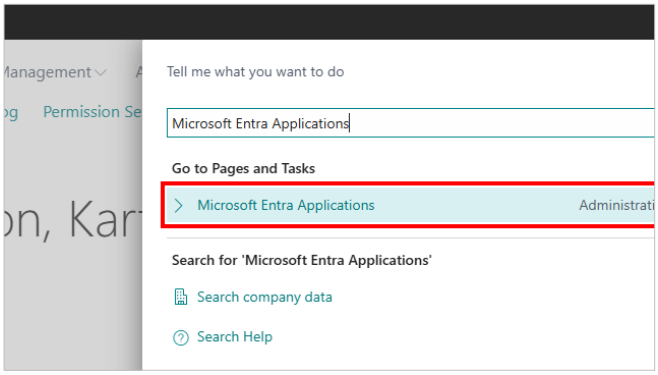
Click on the field **Tell me what you want to do**



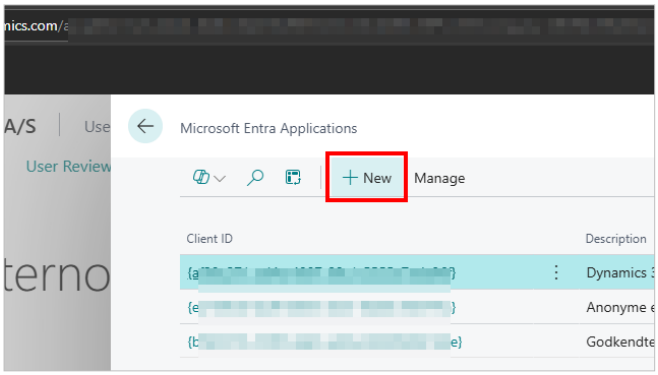
Enter **Tell me what you want to do**.



Click on **Microsoft Entra Applications Administration**

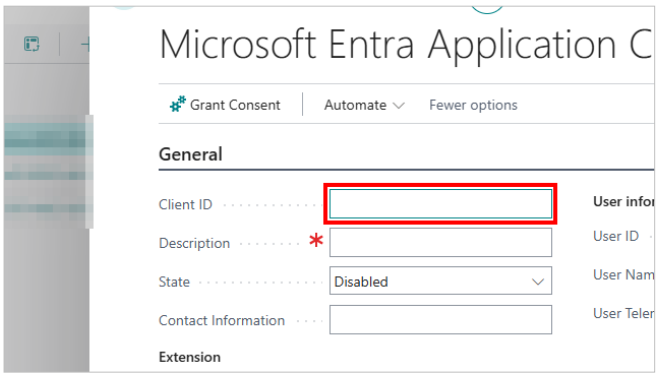


Click on the navigation menu item **New**

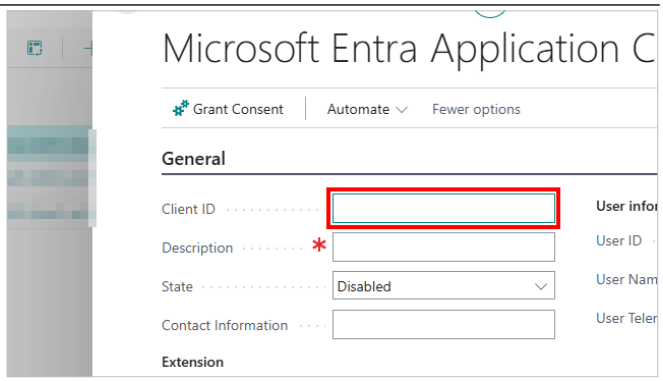


Client ID: 07cd4164-8128-46d0-aee7-741dd0170fbd
Description: ClickLearn MultiTenant application

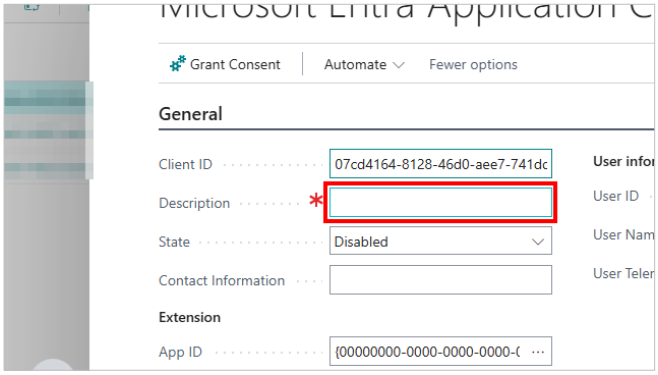
Click on the field **Client ID**



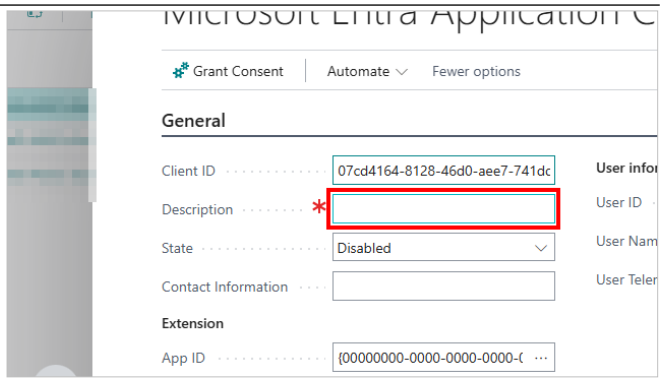
Enter **Client ID**.



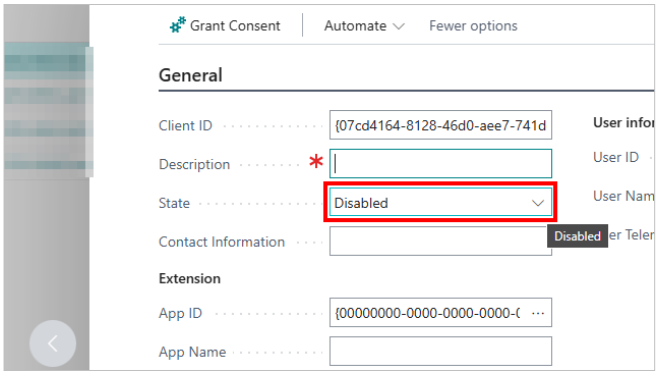
Click on the field **Description**



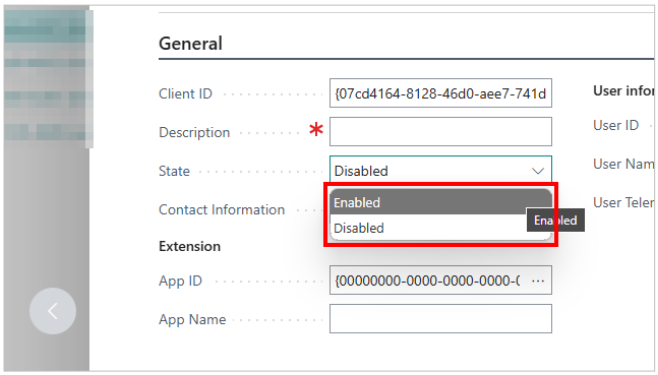
Enter **Description**.



Click on the field **State**

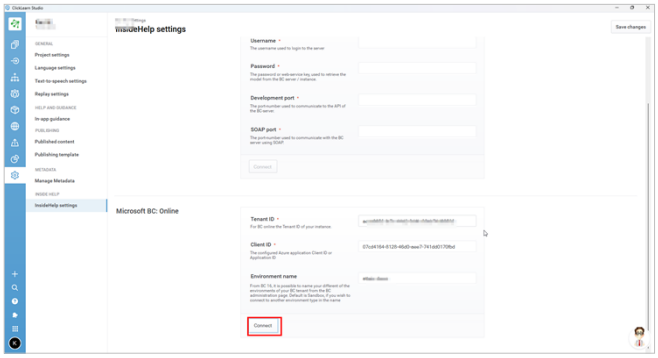


Click on the item **Enabled** in the list
Save the created **Microsoft Entra Application Card** and grant user permission '**D365 READ**' and '**EXTEN. MGT. - ADMIN**'.
WITHOUT providing a specific Company!

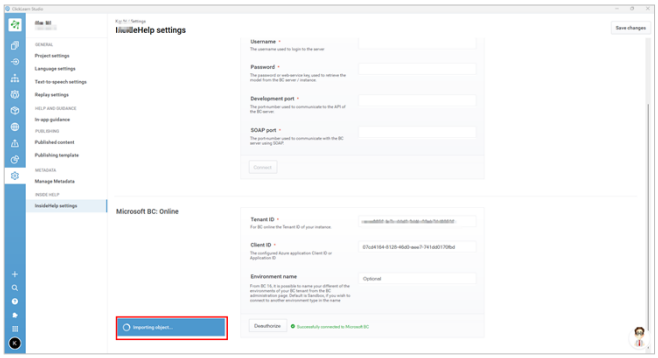


16.5.1. Configure InsideHelp Connection

Fill the **Tenant ID** in which you configured the Entra card and **Client ID**.
Click on the button **Connect**



After clicking **Connect** the objects will start importing which may take some time and then you can verify the same in InsideHelp.



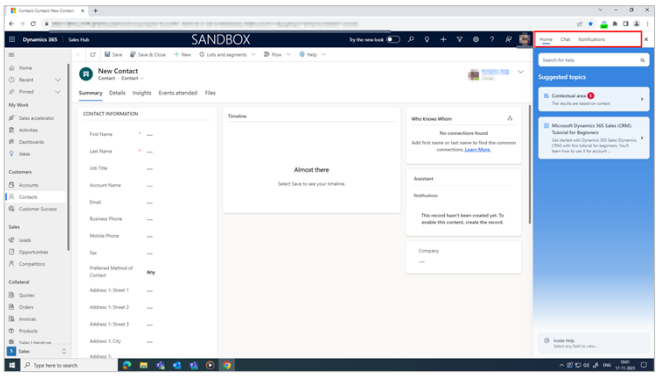
17. User eXperience Panel [UXP]

17.1.What is UXP

Bring guidance, search, and AI answers right alongside the application you're working in, so users find the right steps, ask questions, and follow along in a side panel, without ever switching away from their task.

17.1.1. 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.

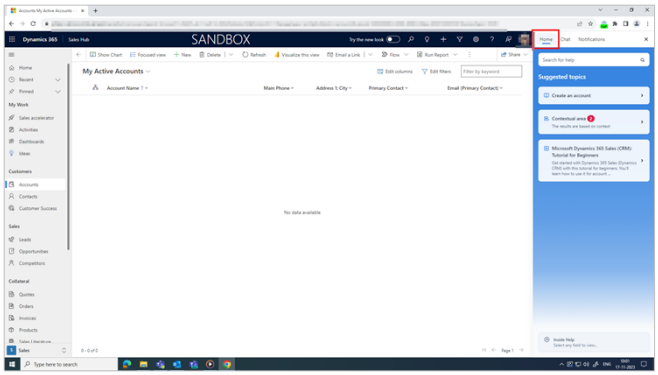
UXP Supported Systems
UXP seamlessly integrates with a wide range of business platforms, bringing guided content and step-by-step assistance directly into the applications you already use:

- CRM
- BC
- FO
- IFS
- Salesforce
- Acumatica
- Oracle

17.1.2. Types of tabs in UXP and its features

17.1.2.1. Home

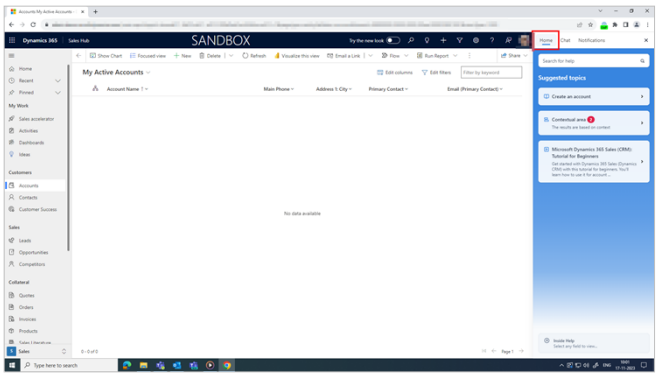
Based on your configuration in ClickLearn Attain, you can see the recordings and sources in the **Home** tab depending on the option you select from the application.



17.1.2.1.1. 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

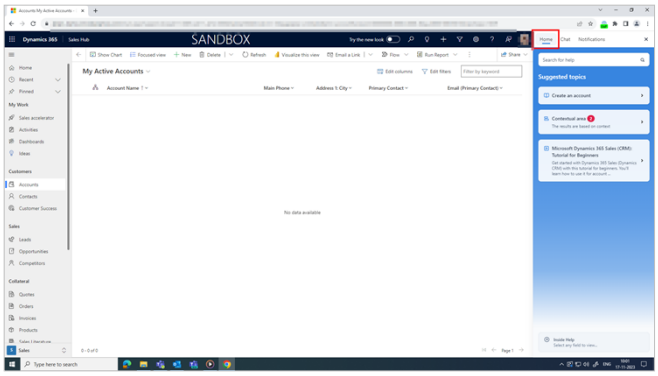


17.1.2.1.2. Contextual Area

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.

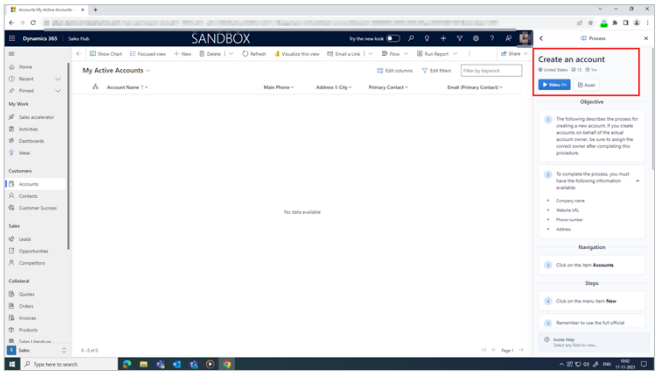


When you click on the recording, it will show the steps listed in the recording along with two options.

- **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.

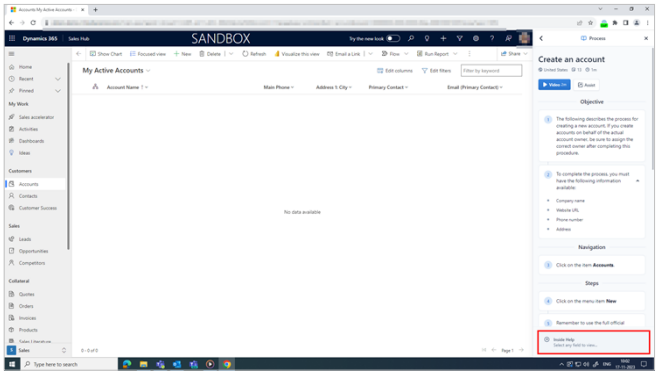
Also, if you want to go directly to a particular field, click on the step that will take you to that field.

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



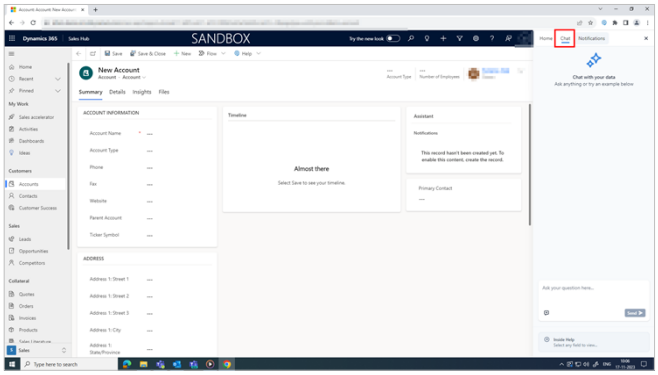
Inside Help: This will display what precisely the field represents. For example, if you select the field first name, it shows what precisely the field represents. You can use 50 characters, this is a first name, etc.

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

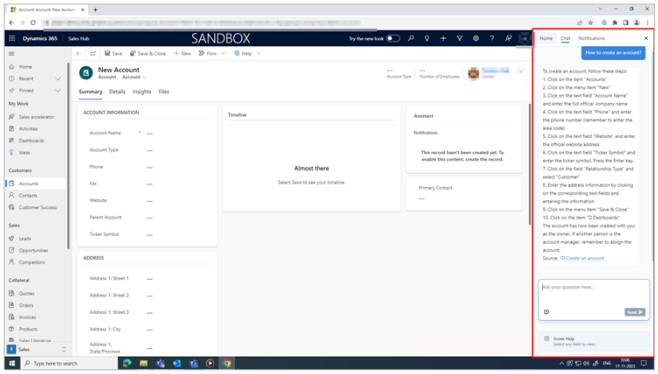


17.1.2.2. AI Chat

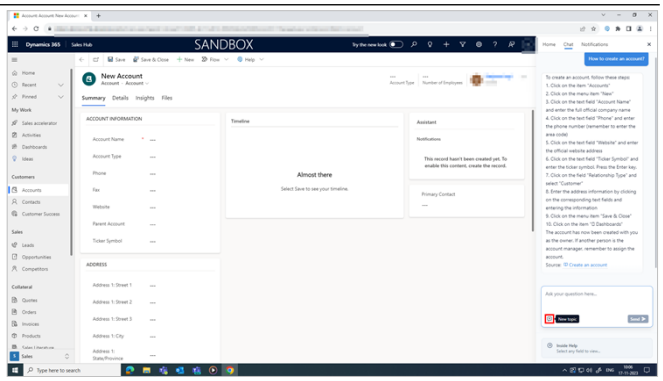
This is the **Chat** tab. From the ClickLearn Attain, we can configure the sources we provide here, comprising PDFs and recordings. The sources we have configured will determine the results. You can type the question in the text box below and click Send.



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.

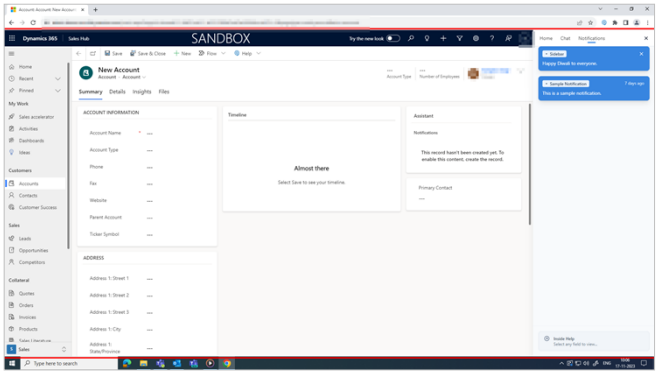


New Topic: This clears the previous chat, and you can start with the new topic.



17.1.2.3. Notifications

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



17.2. Getting Started with UXP Configuration

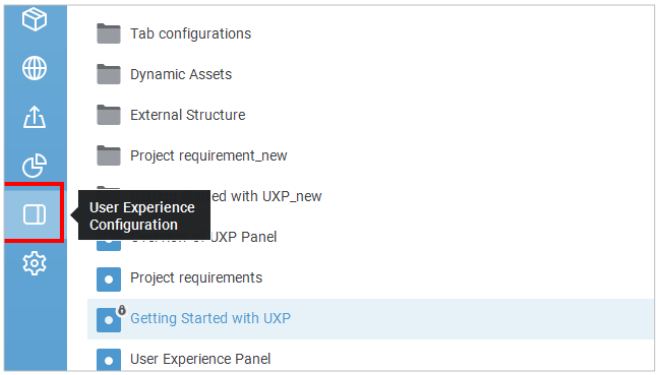
Start from a ready-made default or a clean slate, so you can set up your sources, tabs, and panel settings the way your project needs, without building every piece from zero unless you want to.

17.2.1. Introduction

A new tab appears when you enable the User Experience Panel.

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

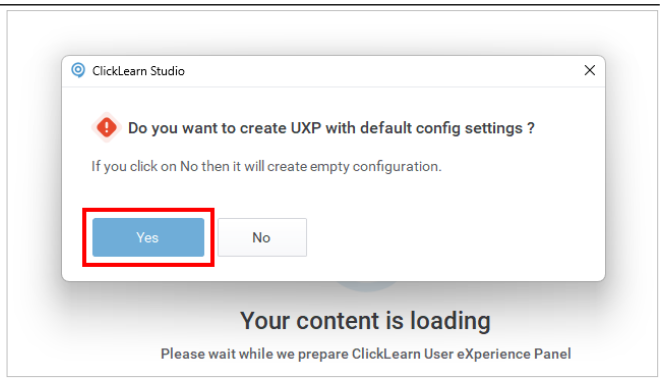
User Experience Configuration: This will enable you to configure the UXP Panel.



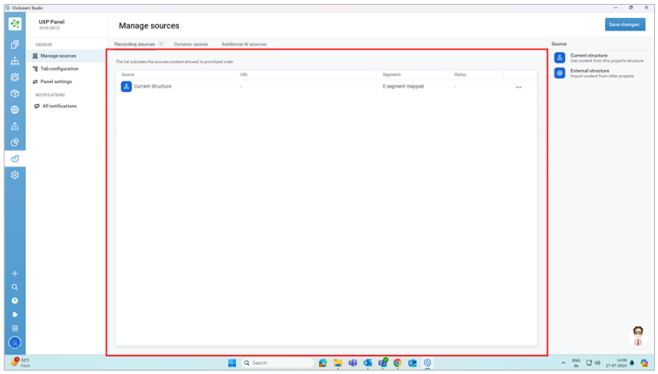
A new dialog appears asking if you want to use the default config settings for UXP. Your choice of yes or no depends on your project's specifications.

If you choose Yes, you will see a default configuration.

Click on the button **Yes**.

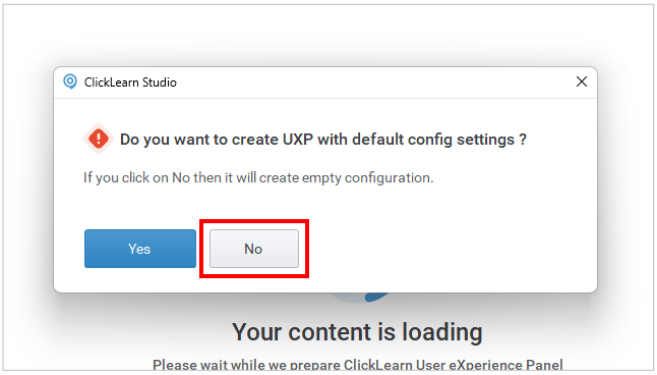


The screenshot shows that the Current Structure is pre-configured. The tabs and recording sources are also configured.

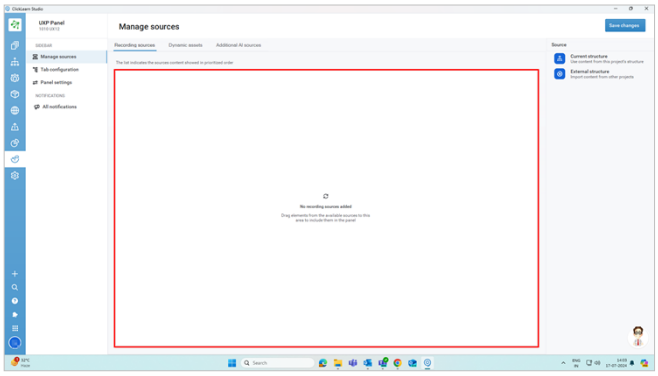


If you choose No, you will start with an empty configuration and have to create everything yourself.

Click on the button **No**.



This opens a blank configuration.

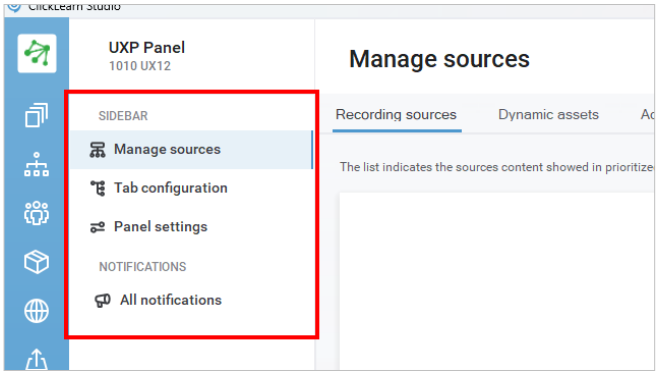


The interface consists of two primary tabs: **Sidebar** and **Notifications**.

Sidebar: This tab includes options for Manage sources, Tab configuration, and Panel Settings.

Notifications: This tab contains all the notifications. 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 app's application ID where you want the User Experience Panel to be active.



17.3.Project Requirements

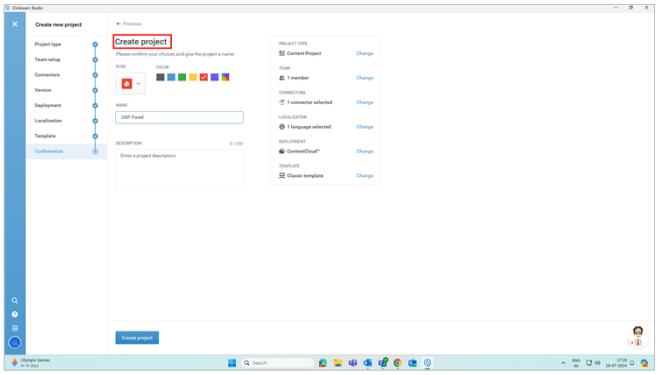
Get the right project and recordings in place before you build, so your UXP panel has content ready to serve from day one, whether you record fresh or import what you already have, without backtracking later.

17.3.1. Introduction

The basic requirements for the UXP are creating a Content project or an InsideHelp project. Start by creating a Content project to get your recordings ready for the UXP panel.

This guide covers the initial setup required before working with the UXP panel. Complete these steps before moving on to segmentation or enabling the UXP.

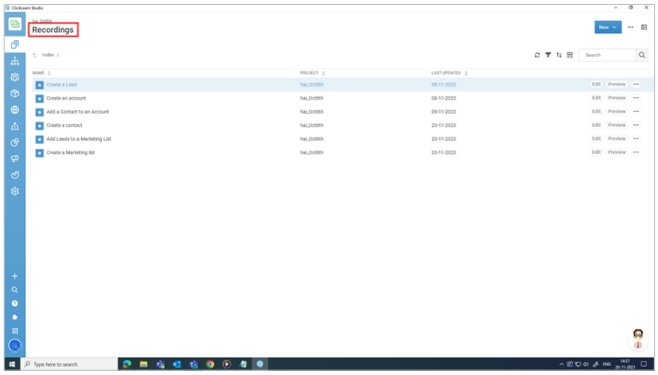
The basic requirements for the UXP are creating a Content project or an InsideHelp project. Start by creating a **Content project** to get your recordings ready for the UXP panel.



Start by creating a **Content** project.

17.3.1.1. Recordings

When you create a new project, there are no recordings added by default. You have two options to add recordings:



4. **Start a new recording directly within the project.**
5. **Import existing recordings from another project.**

Add your recordings using either method before proceeding to segmentation.

17.4. Configure Segmentation for UXP

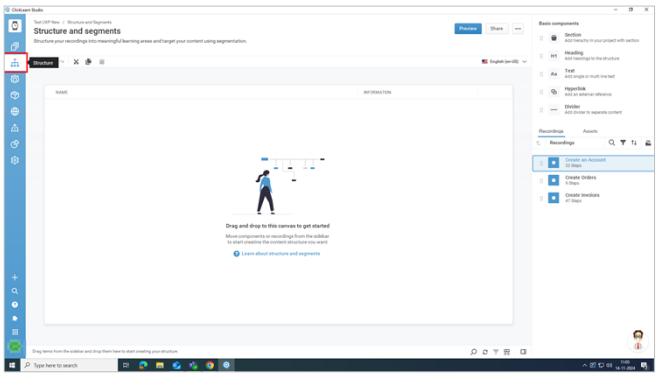
Structure and segment recordings for UXP so each user group sees only the guidance relevant to their role, delivering targeted, clutter-free in-app support.

17.4.1. Segmentation

This guide walks you through structuring your recordings and applying segmentation to target specific user groups. Before starting, ensure you have completed **Project Requirements** and have recordings available in your project.

You need to structure and segment your recordings before using them as a source in the UXP panel.

- Open your project and click **Structure**.
- Select the recordings you want to include and drag and drop them into the structure.



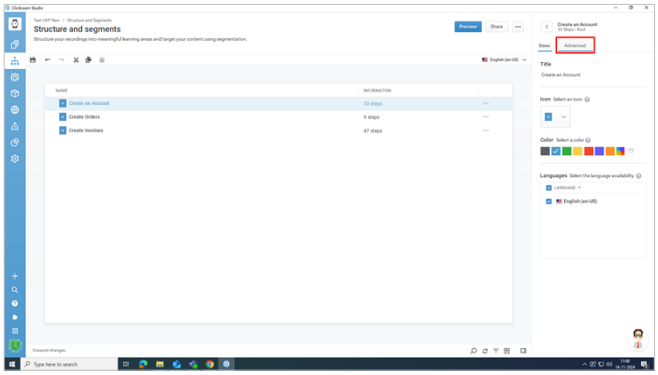
17.4.1.1. Adding Segmentation

Segmentation controls which users can access specific recordings. Users will only see content from recordings assigned to their segment.

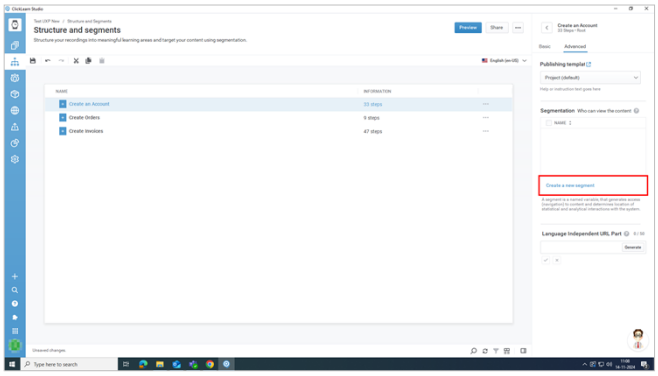
Note: If you assign a segment to a recording but do not map it in UXP, users will not see those recordings in the panel.

Select the recording you want to segment.

Click **Advanced**.

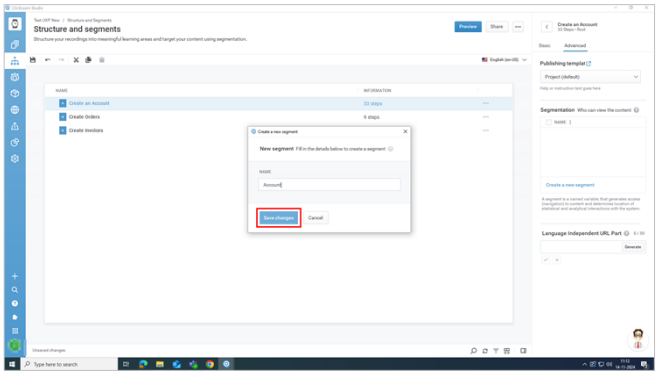


Click Create a new **segment**. A dialog box appears.

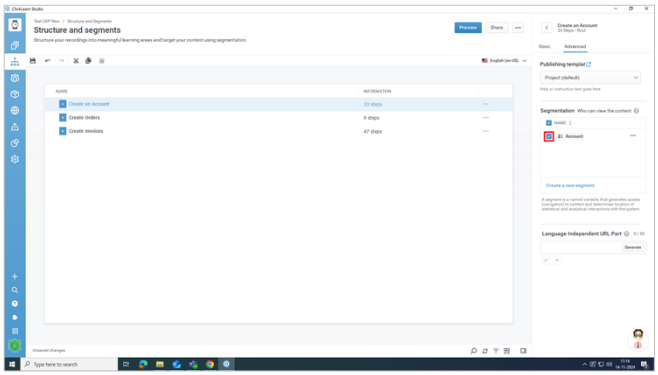


Enter a name for your segment — for example, Lead. Create segments based on your project needs.

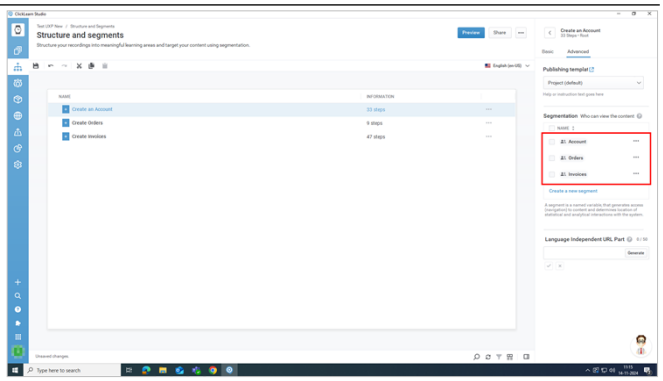
Click **Save changes**.



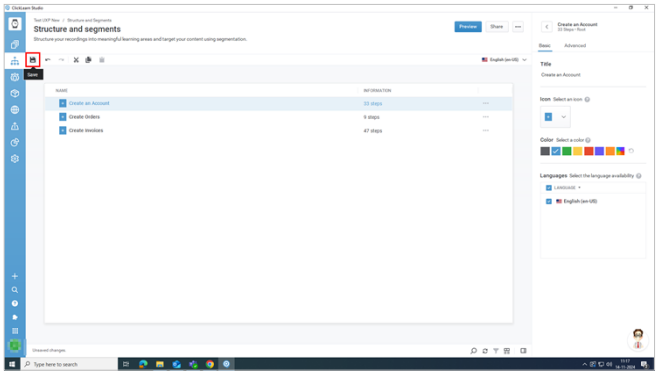
Select the checkbox next to the segment you created to assign it to the selected recording.



Repeat this process to create additional segments and assign recordings accordingly.



Once all segmentation is complete, click **Save**.



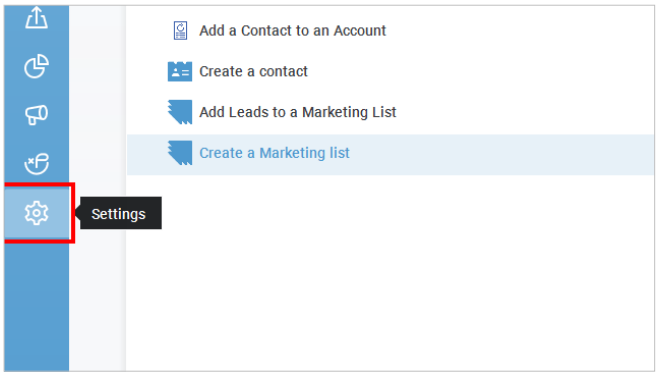
17.5.Enable UXP in Your Project

Enable the User Experience Panel in your project and match its color to your brand, giving segmented users in-app access to the recordings they need.

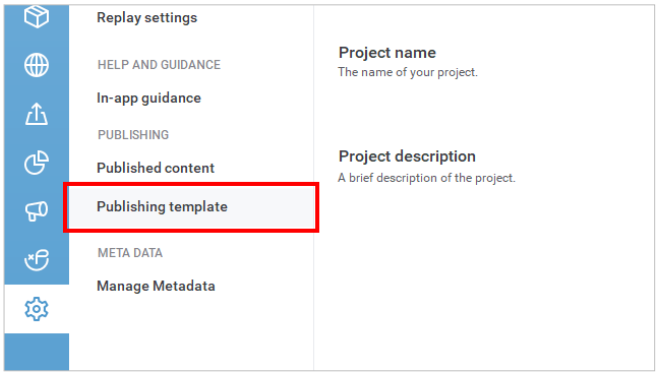
17.5.1. Enable UXP

This guide covers how to enable and configure the User Experience Panel (UXP). Before starting, ensure you have completed Project Requirements and Segmentation.

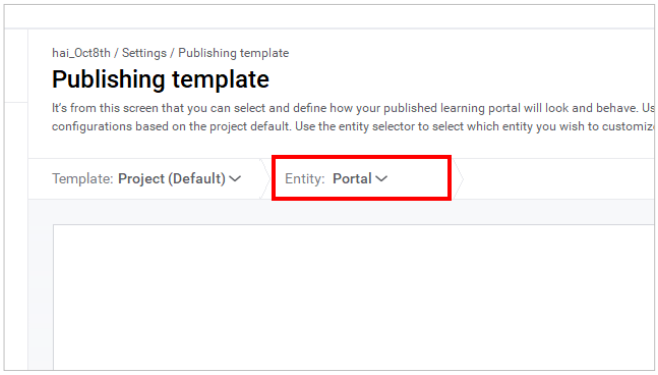
To enable the UXP, click on the button **Settings**.



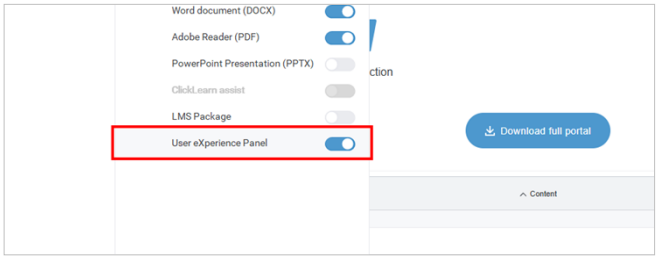
Click on the button **Publishing template**.



Click on the **Entity** button.



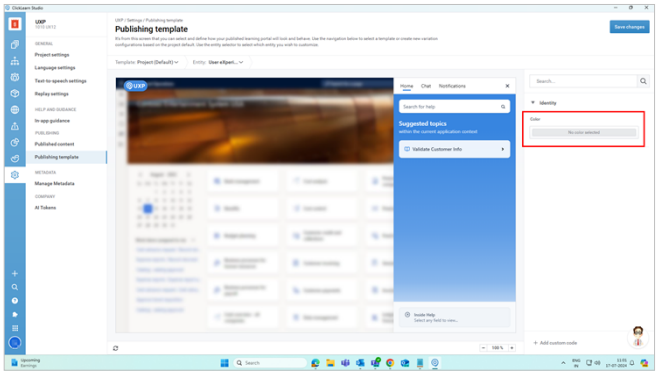
Enable the option **User Experience Panel**.



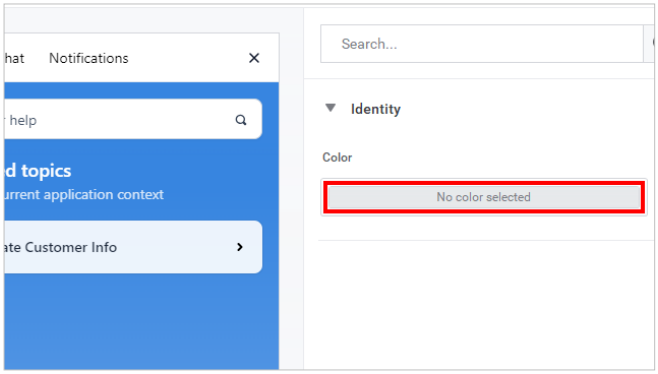
17.5.1.1. Customizing the Panel Color

The Identity component includes a Color option to match the panel to your requirements.

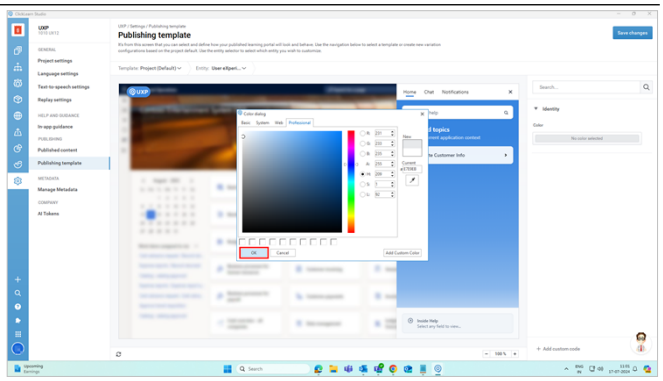
This is precisely how your panel will look in the application. Identity has a component, **Color**, which allows you to modify the panel's color according to your requirements.



Click on the label **Color**.

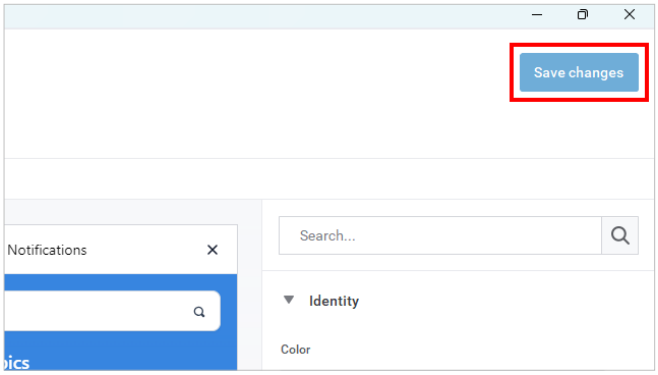


This pops up with a new color dialog box. Pick the color you want for the UXP panel and click **OK**.



Click on the button **Save changes**.

Your UXP panel is now enabled and configured. Users assigned to segments will see their respective recordings in the panel.



17.6.Manage Sources

17.6.1. Manage Recording Sources

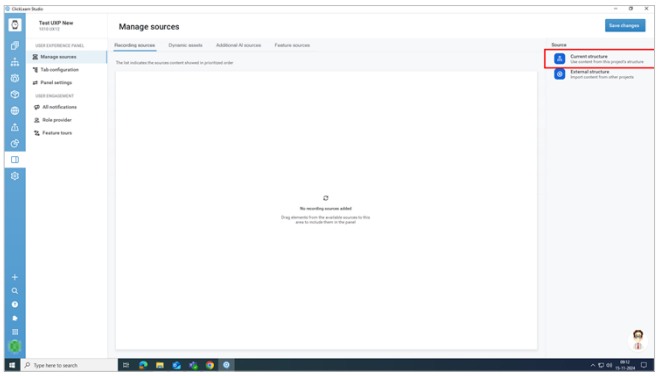
17.6.1.1. Recording Sources and Manage User Roles

Map your content to user roles so the right people see the right recordings, so each role gets only the segments relevant to their work in the UXP panel, without exposing everything to everyone.

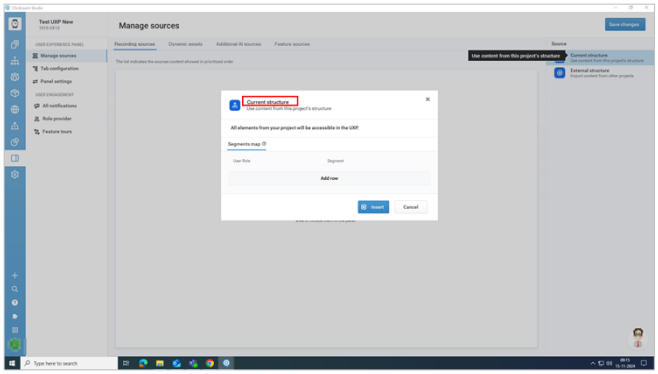
17.6.1.1.1. Recording Sources

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.

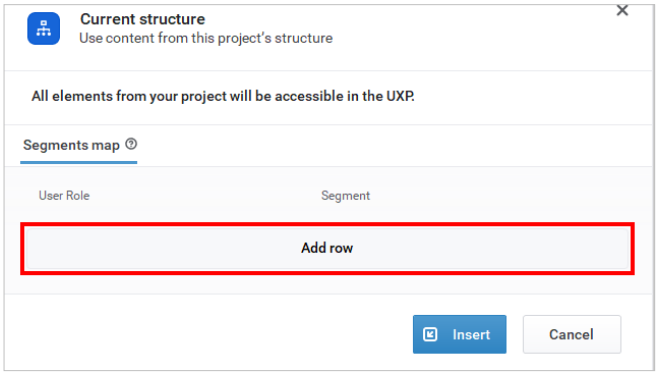
Select the **Current structure** and drag and drop it in the empty panel.



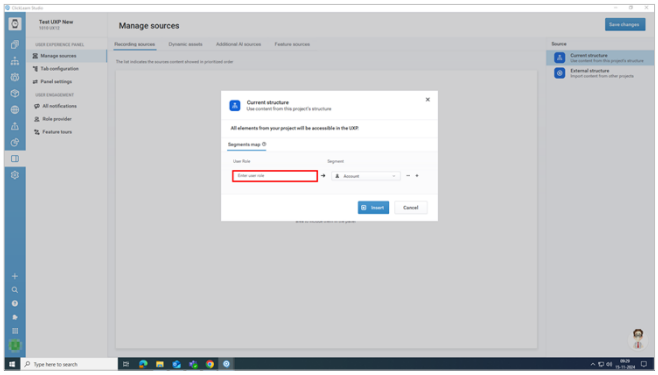
This opens a new dialog box, **Current Structure**, where you must map your segments. You can map your segments according to the user role.



Click on the button **Add row**.



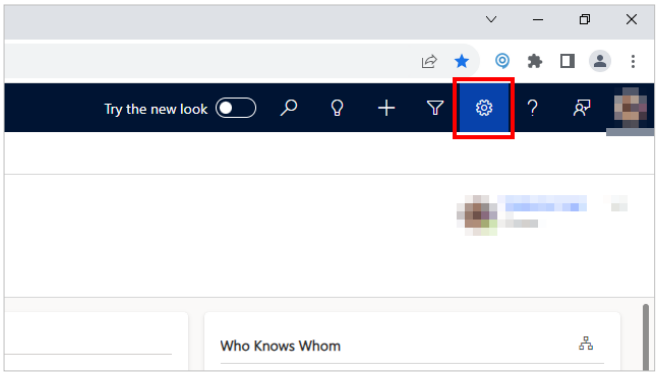
NOTE: Before adding the **User Role** in the field, you must know the user roles in your application.



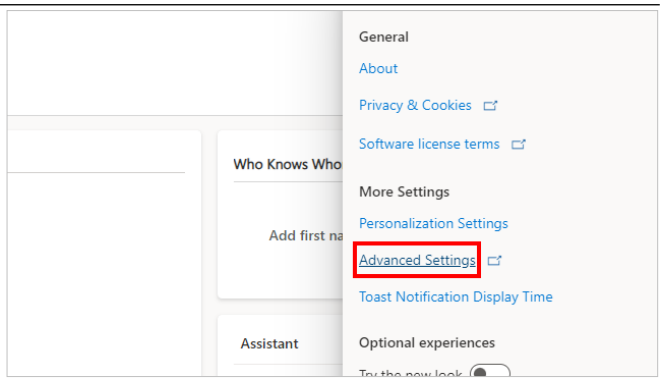
17.6.1.1.2. Manage Segments

17.6.1.1.2.1. Example to find User Role in customer engagement system

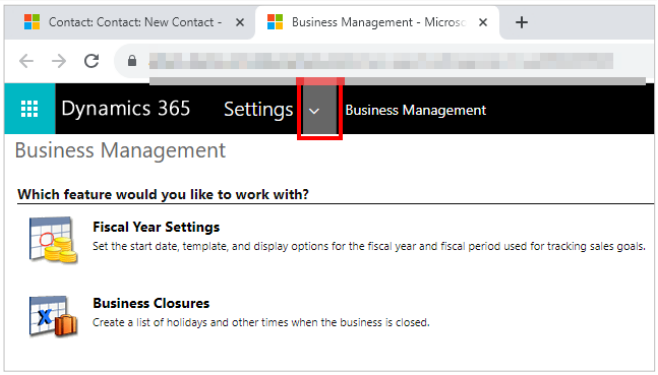
To check the user roles in the application, click on **Settings**.



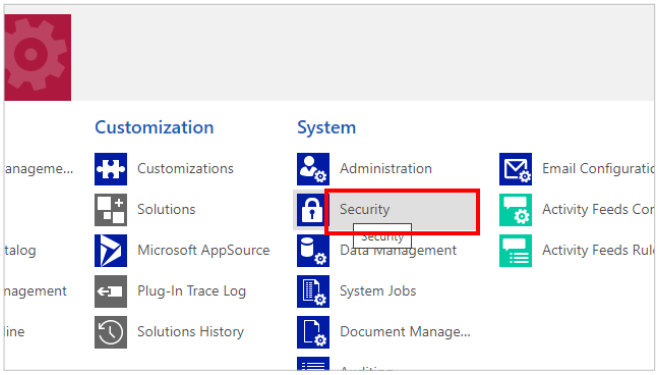
Click on the **Advanced Settings** button.



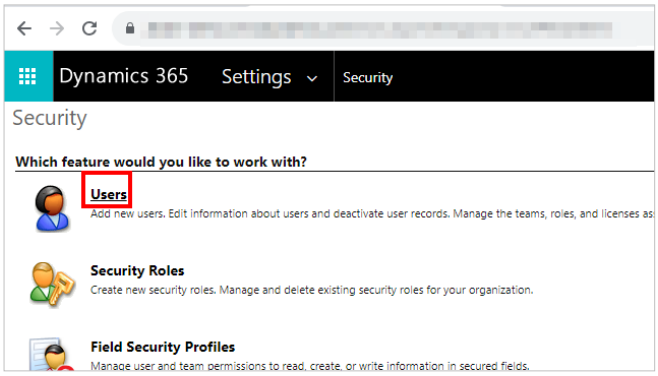
Click on the dropdown **arrow**.



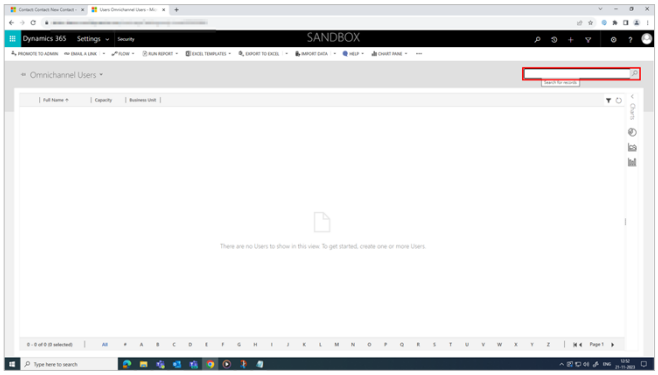
Click on the option **Security**.



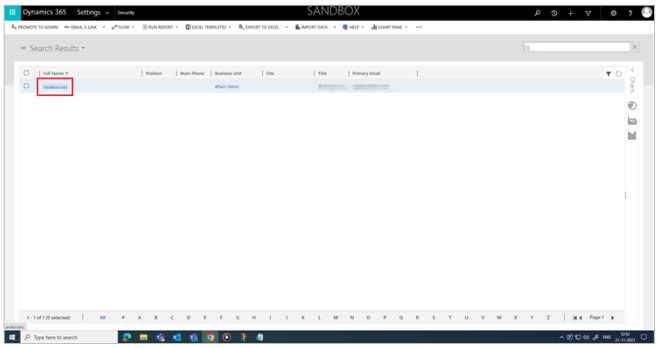
Click on the link **Users**.



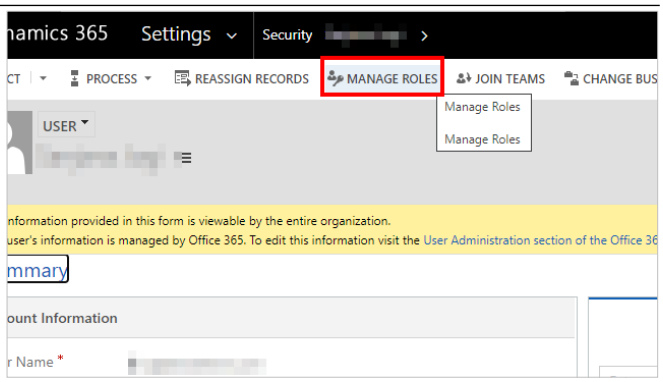
Click on the **search box**, type in the user name, and click search.



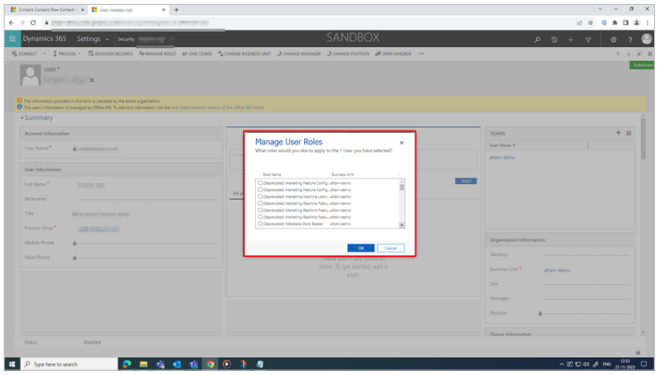
Click on the **user name** displayed in the search results.



Click on **MANAGE ROLES**.



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



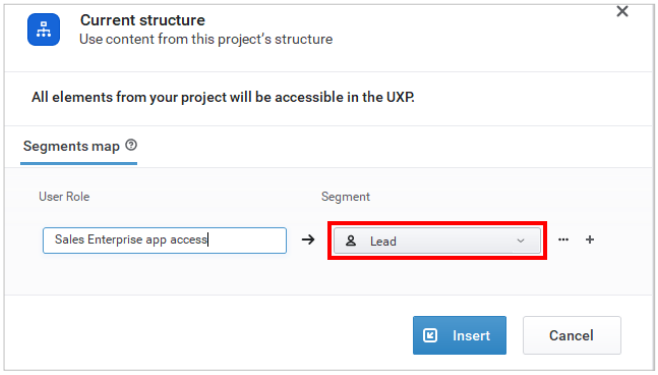
17.6.1.1.2.2. Segment Mapping

There are two components while mapping segments.

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

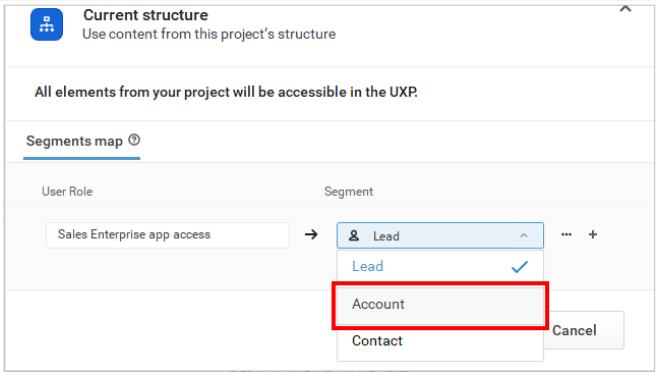
Segment: These are the segments that we created in the structure.

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.

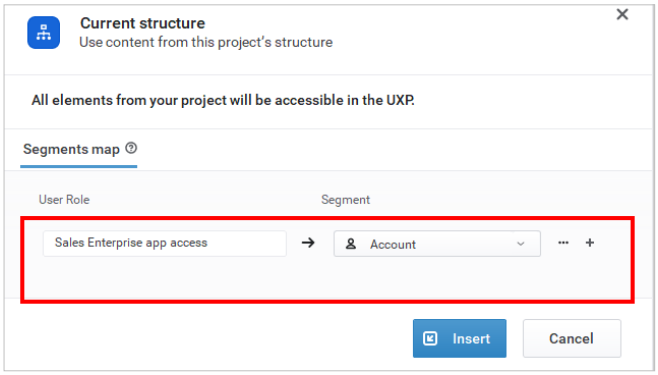


Type the user role and click on the dropdown **Segment**.

Click on the dropdown item **Account**.

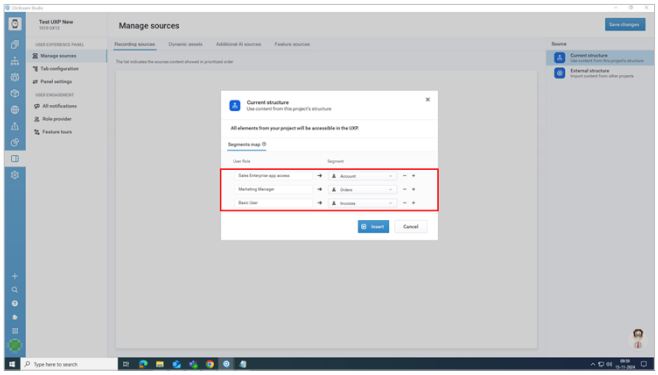


In our case, we have added the Account segment to the Sales Enterprise app access user role.

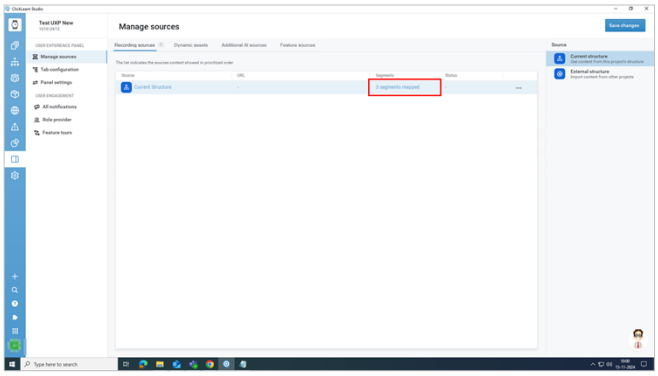


Similarly, we will create two more user roles. We will assign Lead and Contact to the Marketing Manager and Basic User, respectively. After segment mapping, click on Insert.

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

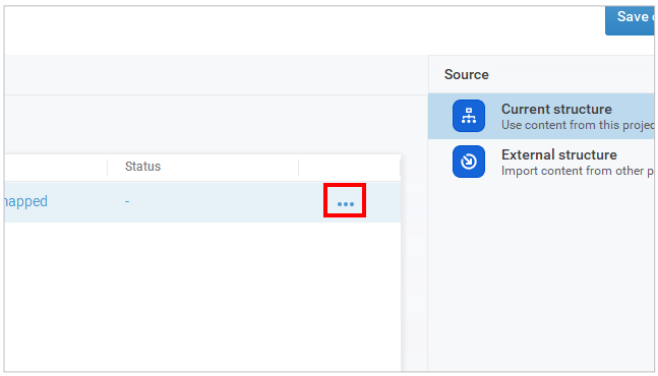


The **Segments** column displays the number of segments you have mapped in the current structure.



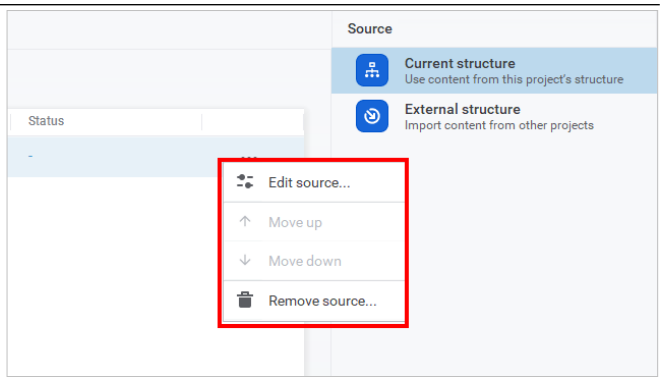
17.6.1.1.3. Other options associated with the current structure

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

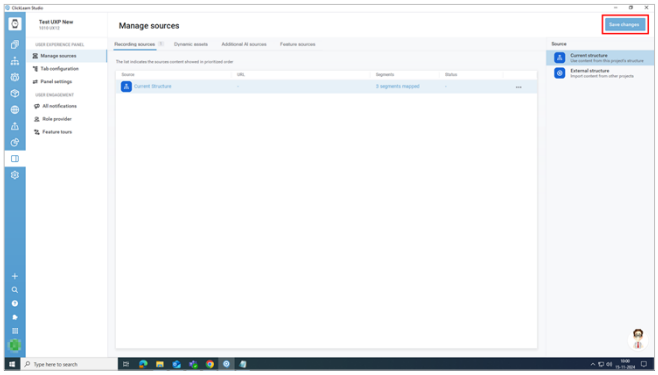


The other options associated with the current structure are:

- **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**



17.6.1.2. Add External Content Sources

Share content securely between companies with a formal federation handshake, so one company's recordings appear in another's UXP panel, mapped by segment and metadata, without duplicating or rebuilding the content.

17.6.1.2.1. Prerequisites

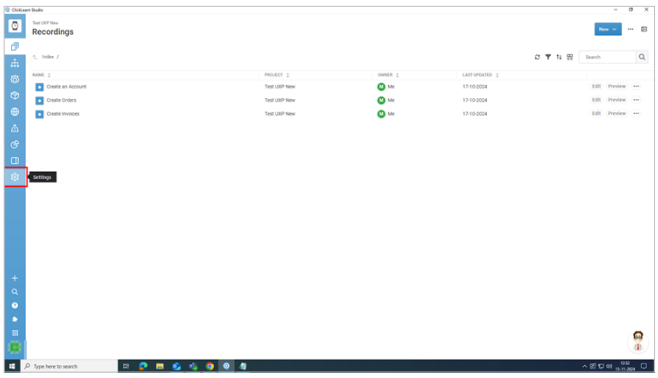
Listed below are the prerequisites for using the content from a different company.

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

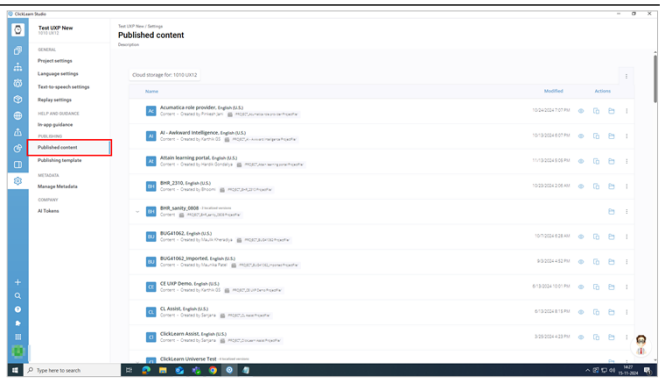
17.6.1.2.2. UXP Federation

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.

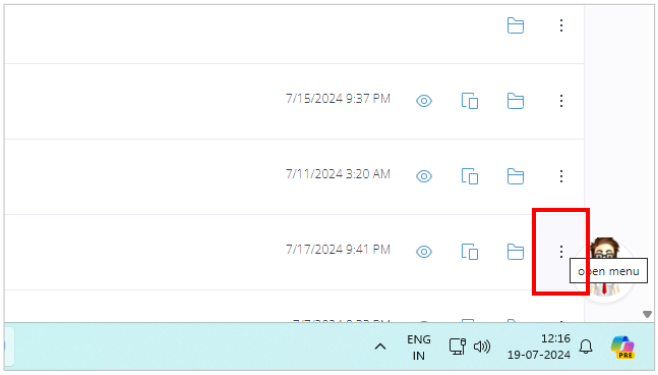
Below are the steps you can follow for the UXP federation.
Click on the **Settings button.**



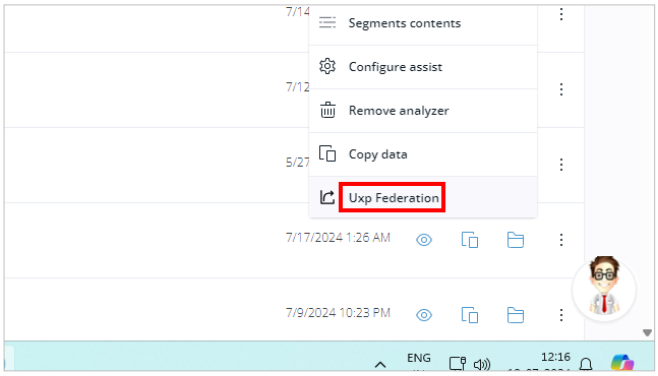
Click on the button **Published content**.



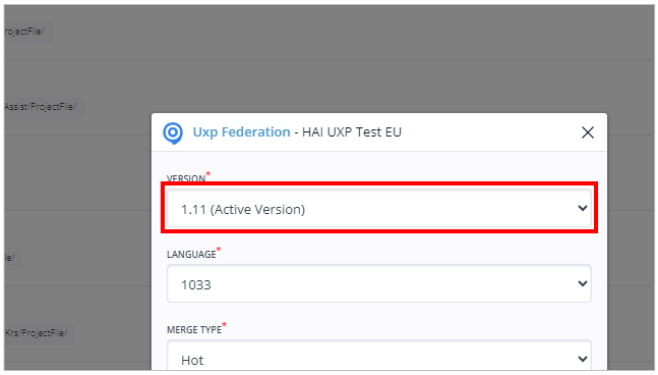
Select the project that has the content you want to share. Click on the button more.



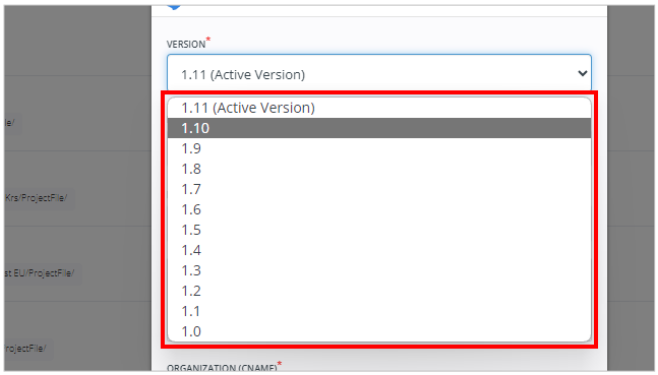
Click on **Uxp Federation**.



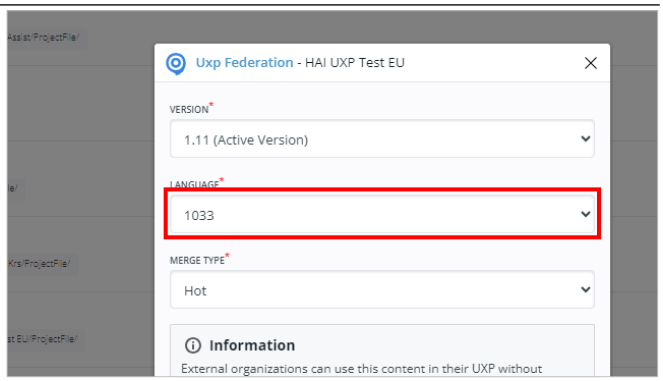
This displays the active version of the project.



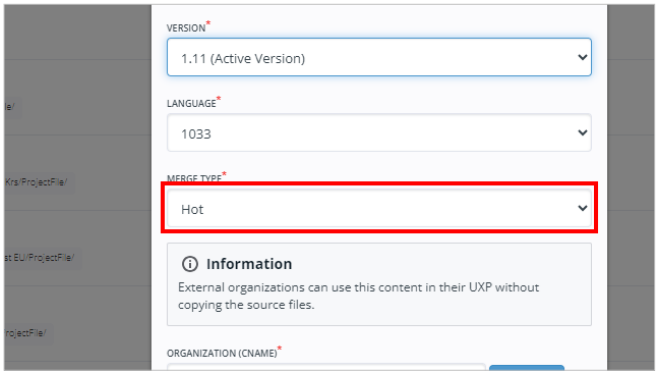
You can choose the version you want to use from the dropdown.



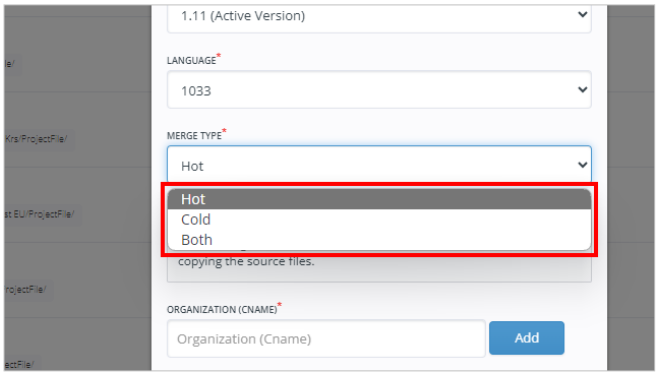
You can select the language of the project.



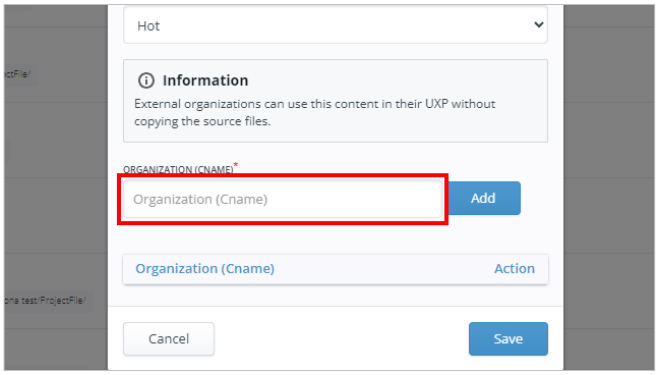
Click on the combo box.



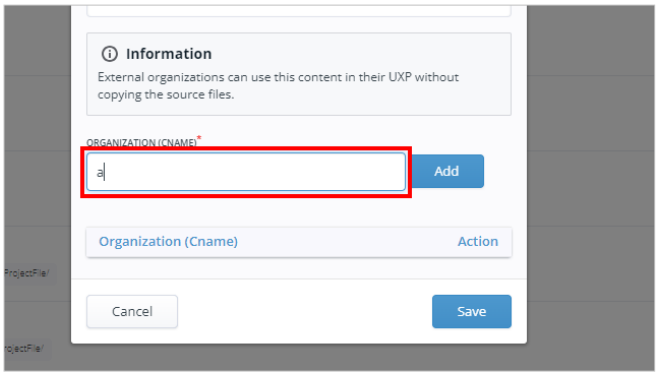
Merge Type: Hot merge imports the recordings based on your external structure, allowing you to view them without making any changes. On the other hand, cold merge imports all recordings and files, enabling you to modify and edit them. You also have an option to use both, which combines the hot and cold merge.



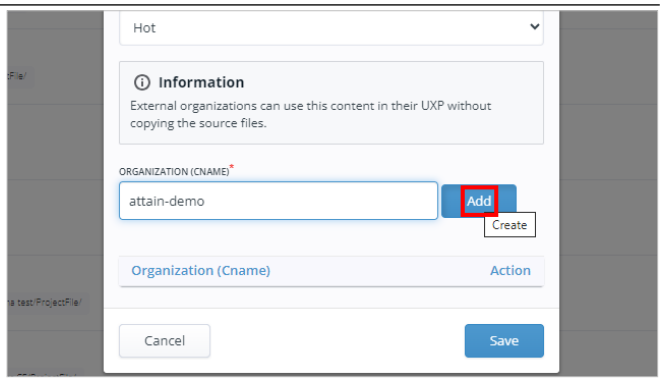
Click on **Organization (Cname)**.



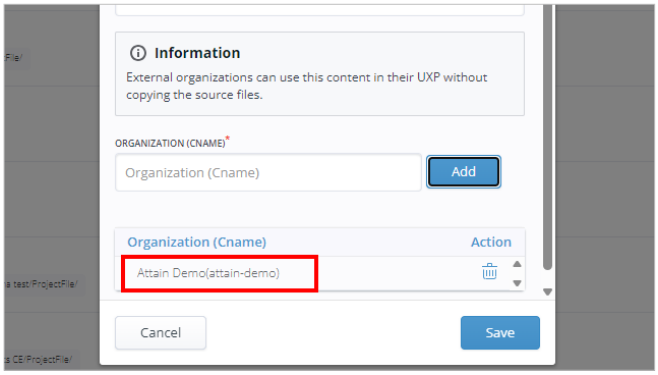
Enter **ORGANIZATION (CNAME)***.
This should be the organization name of the company to which you are sharing the content to be used in UXP.



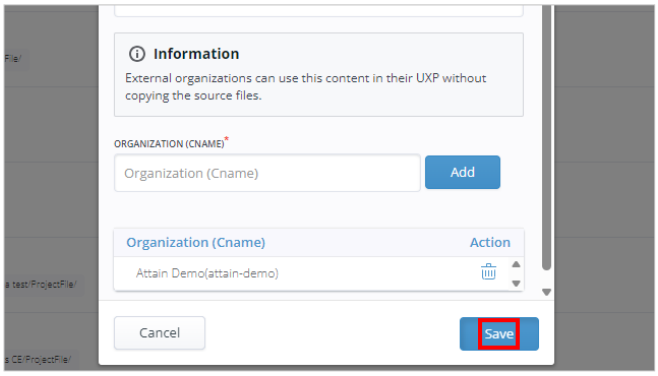
Click on **Add**.



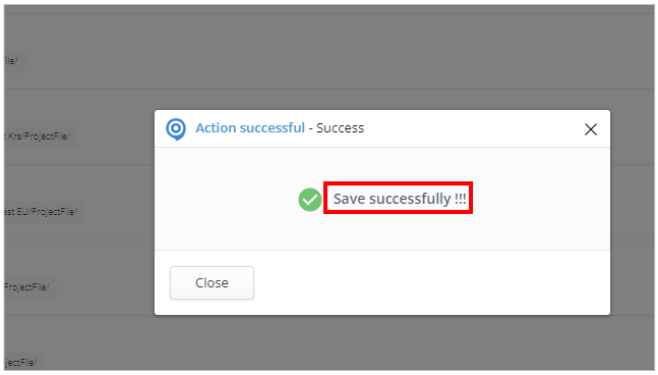
The company Cname **Attain Demo** is created.



Click on **Save**.

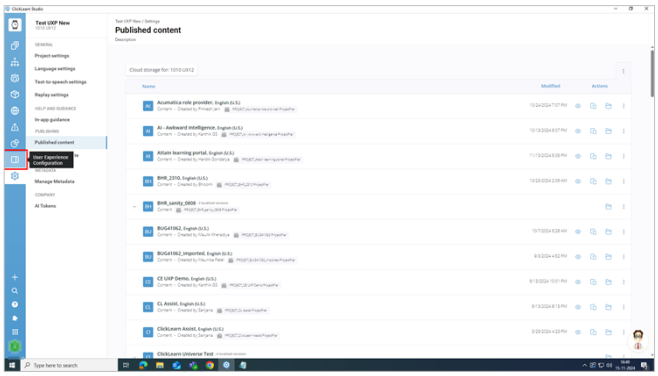


This displays the message: **Save successfully**.

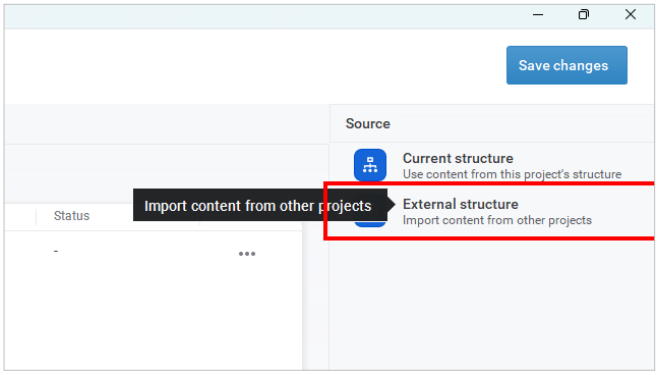


17.6.1.2.3. Configuring in the User Experience Configuration

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

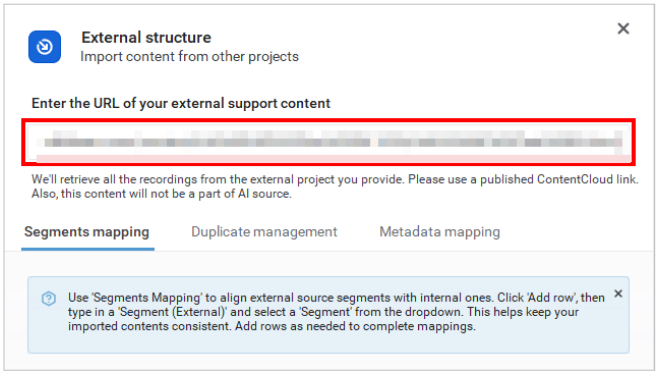


Click on the node **External structure** and drag and drop in the panel.



17.6.1.2.3.1. URL

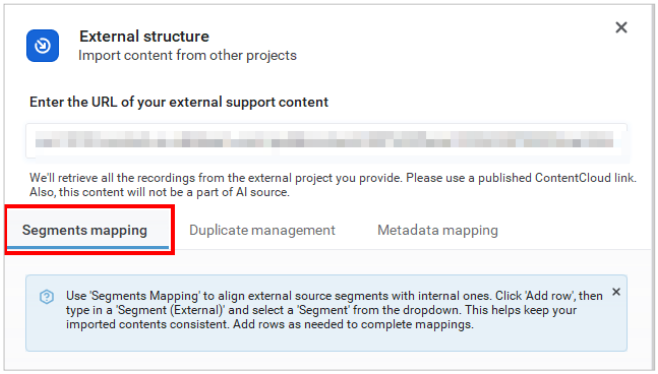
URL: This opens with a new dialog box where **you** (the destination company) must enter the content URL of the **source project** you received via mail. Click on the textbox and enter the **Url**.



17.6.1.2.3.2. Segment mapping

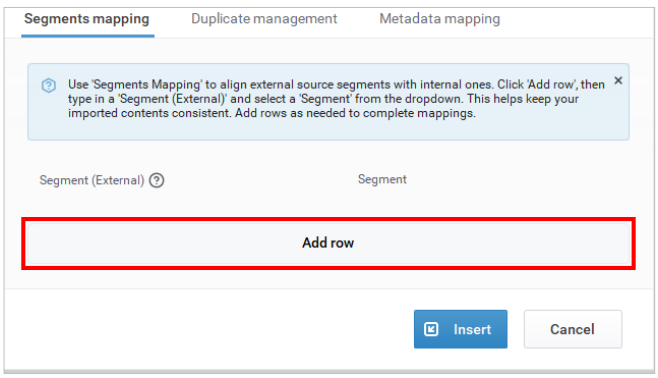
Segment mapping helps you to align external source segments with internal ones.

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



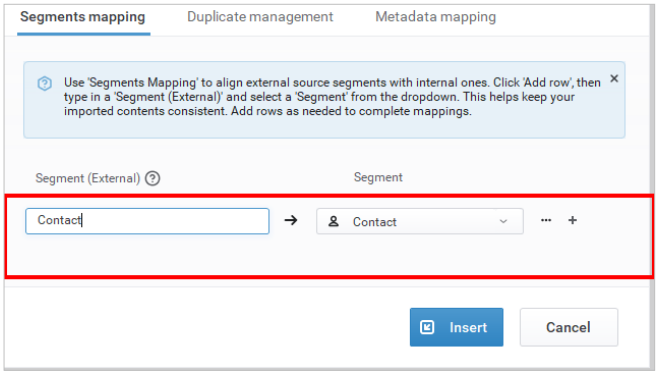
If you have not mapped these segments in the destination and the content is segmented in the source, those recordings will not appear in UXP.

Click on the button **Add row**.



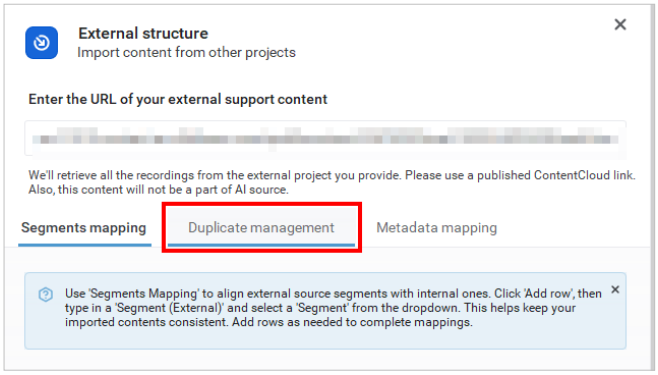
Here, the **Segment (External)** is the segment name used in the source project.

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



17.6.1.2.3. Duplicate management

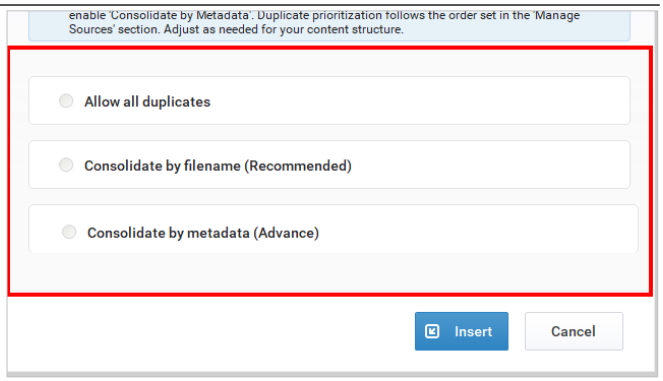
Click on the tab item **Duplicate management**.



Allow all duplicates: Disable the toggle to include all duplicates.

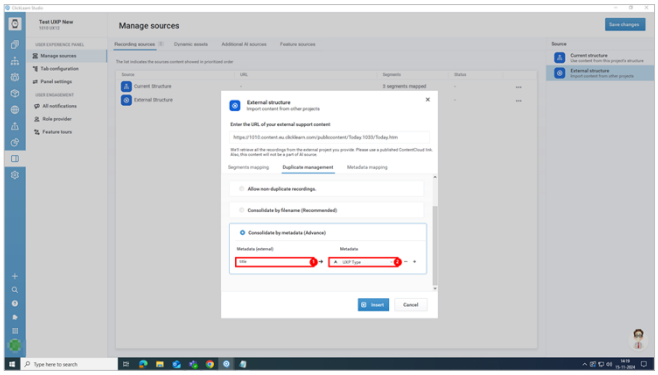
Consolidate by filename (Recommended): This ensures unique recordings per filename are imported. You can disable the toggle if you wish to include all the duplicates.

Consolidate by metadata (Advance): Enable 'Consolidate by metadata' for advance control.



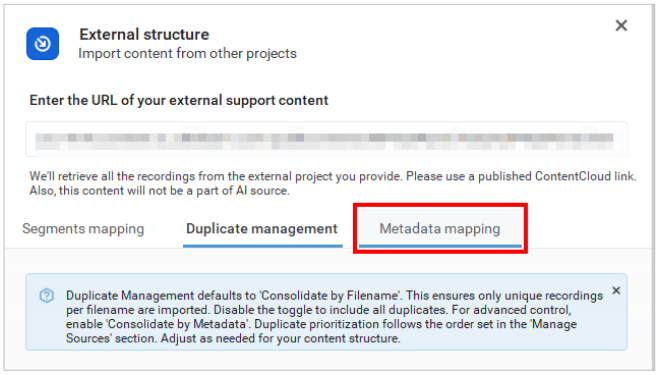
Metadata

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.

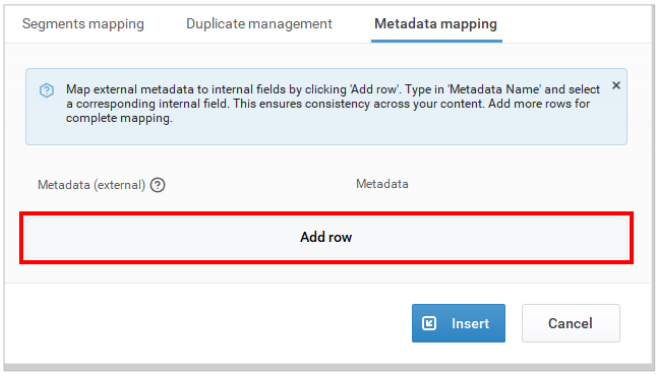


17.6.1.2.4. Metadata mapping

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

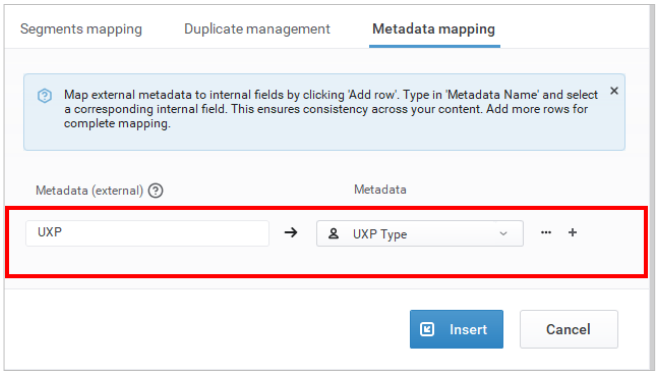


Click on the button **Add row**.

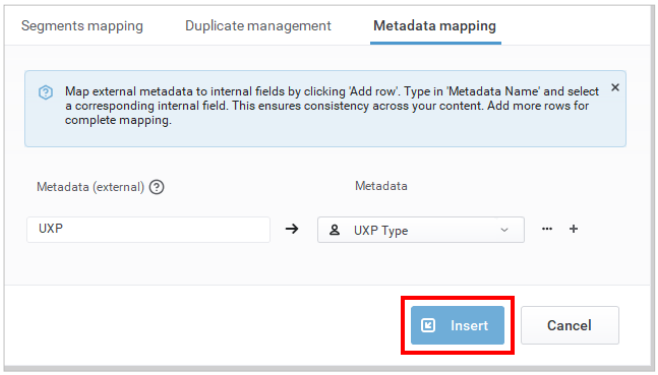


Here, the **Metadata (external)** is the metadata name used in the source project.

Metadata is the metadata name used in the internal project.

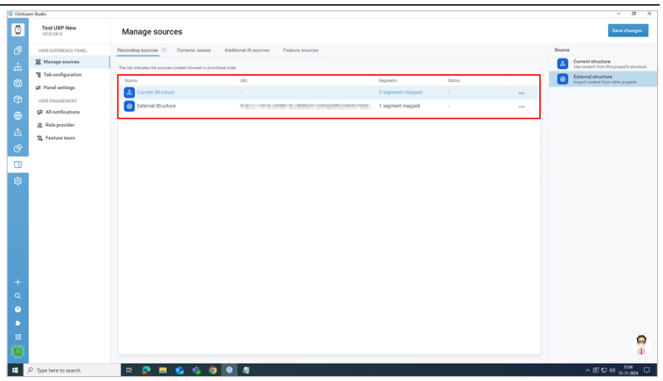


Click on the button **Insert**.



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.



17.6.2. Dynamic Assets

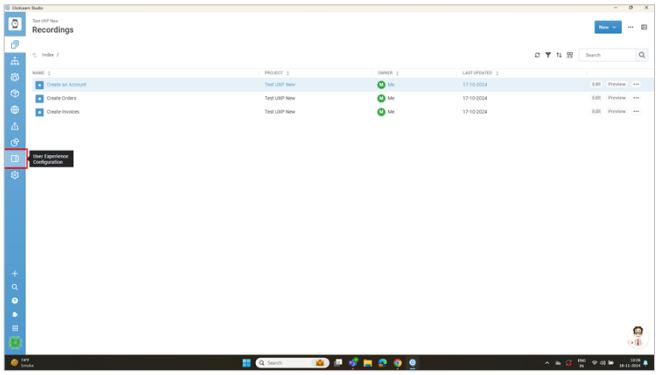
17.6.2.1. Add Dynamic Assets

Pull in content created outside ClickLearn as a search and suggestion source, so external JSON data surfaces alongside your recordings in the UXP panel, without rebuilding that content inside Attain.

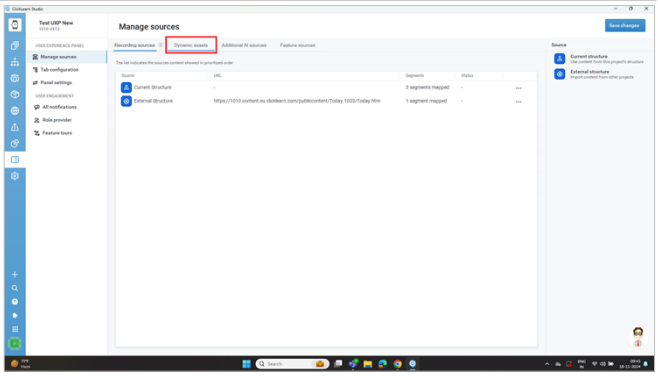
17.6.2.1.1. Dynamic Assets

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

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

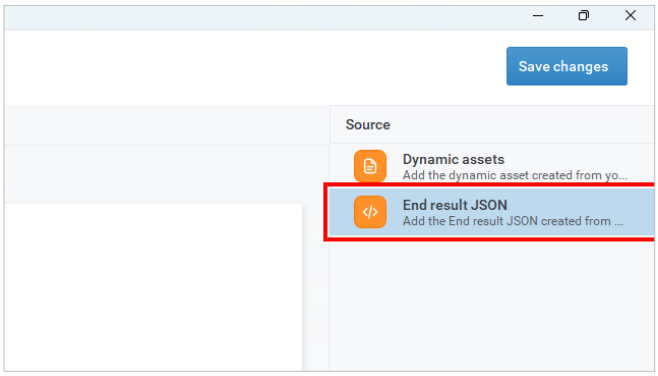


Click on the tab item **Dynamic assets.**

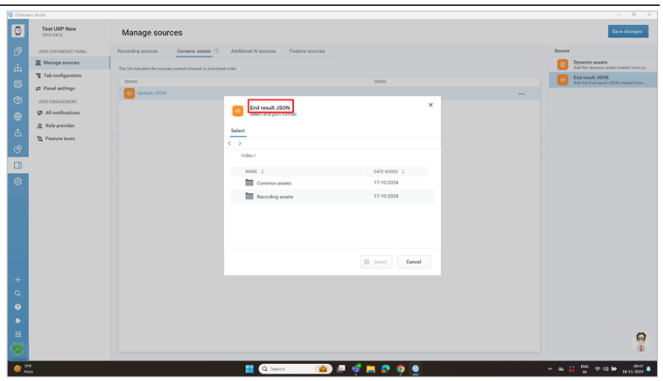


17.6.2.1.2. End Result JSON

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

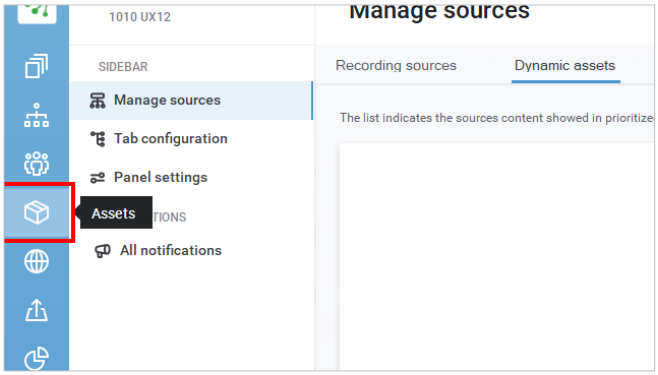


It pops up with a new window, **End result JSON**, that allows you to add the JSON files to dynamic assets. In our case, no JSON files are present. You can configure them from assets to have them here. Click on **Cancel**.



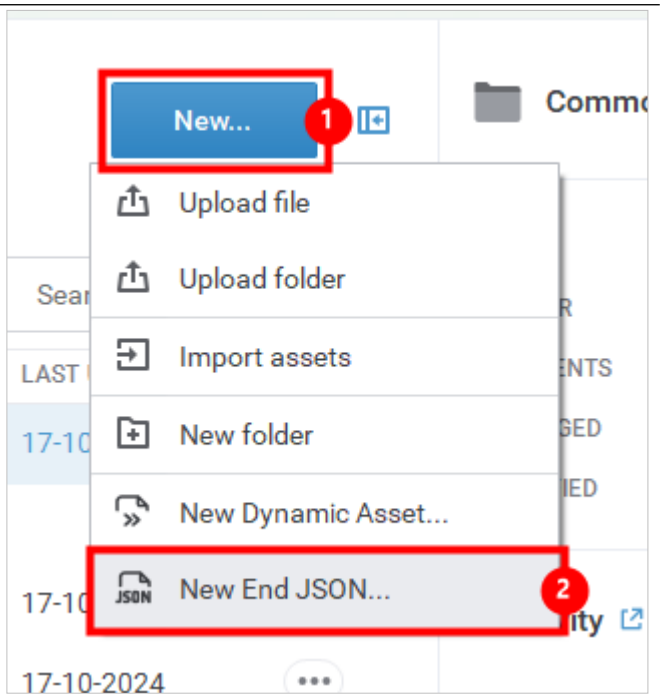
17.6.2.1.2.1. Create End JSON

Click on the **Assets** button.



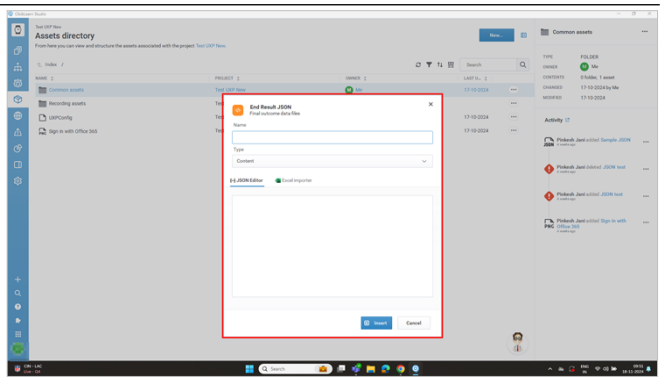
Create End JSON

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

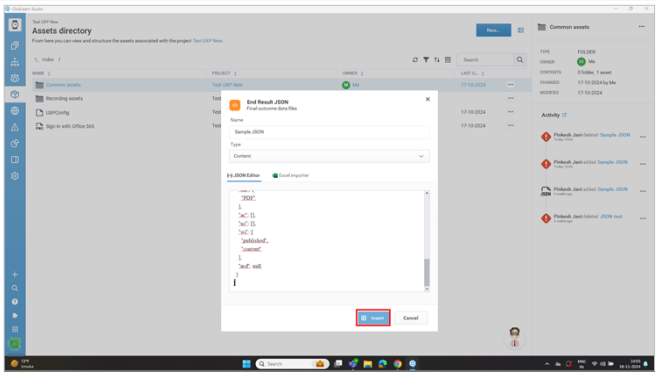


Name: The Name you would like to provide to the JSON file.

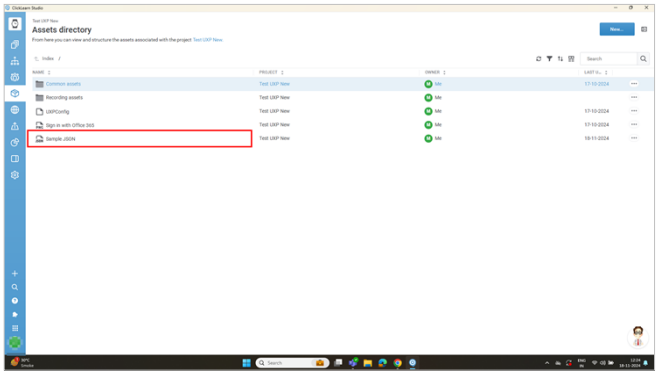
JSON Editor: You can insert the code here.



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

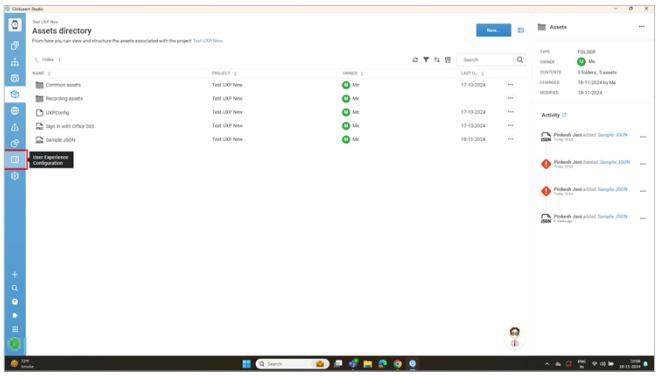


The JSON file we created is in the assets.

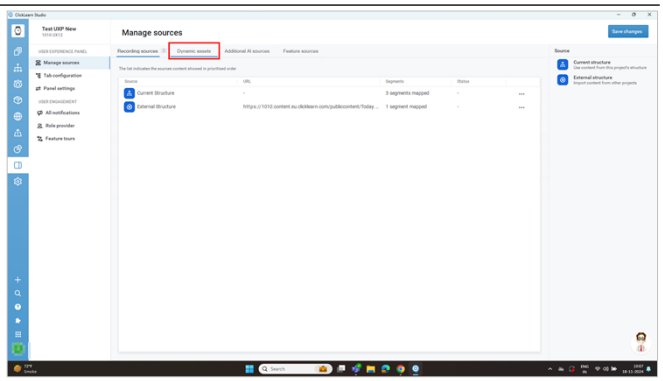


17.6.2.1.3. Add End Result JSON to Dynamic Assets

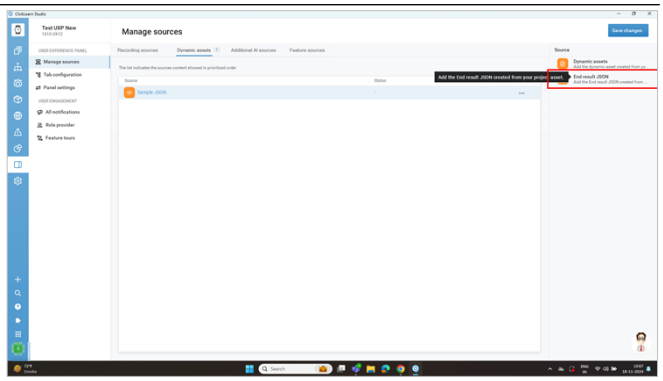
Click on the button **User Experience Configuration.**



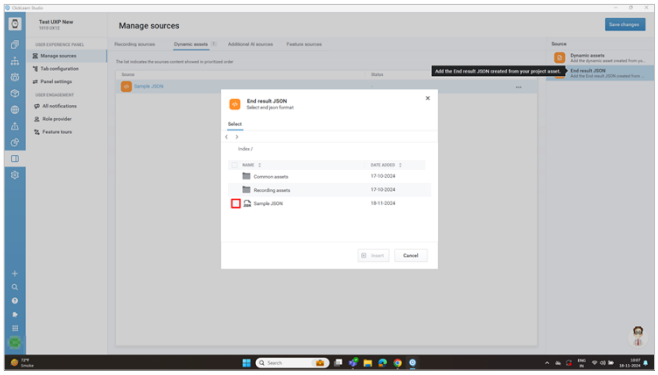
Click on the tab item **Dynamic assets.**



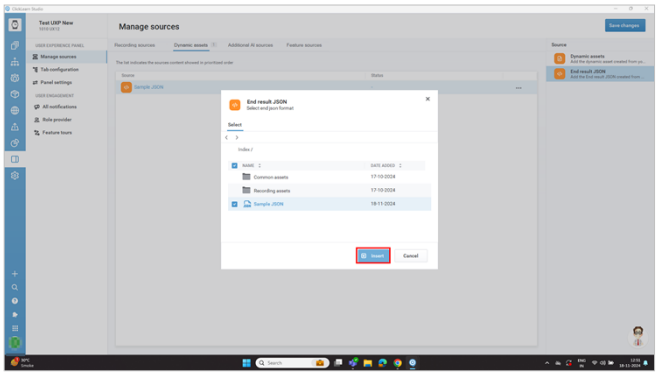
Select, drag, and drop the **End result JSON** in the empty panel.



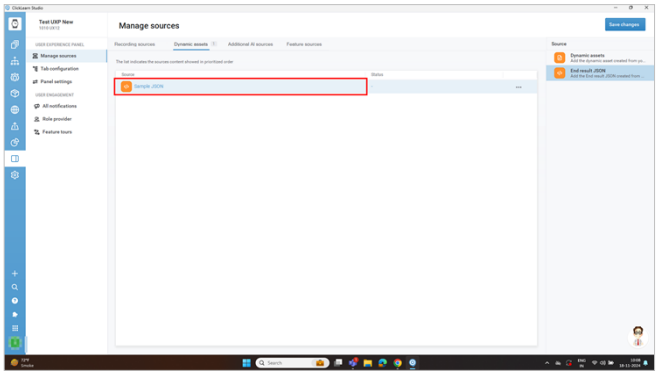
The JSON file you created in Assets is visible here. Click on the **checkbox**. Choose the file you want to add to Dynamic assets.



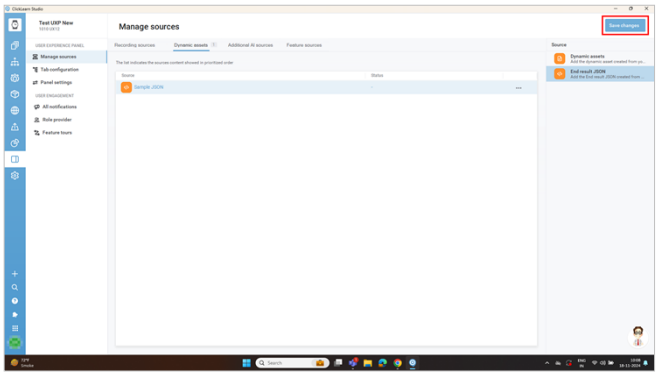
Click on the button **Insert**.



The dynamic asset uses the JSON file as a source.



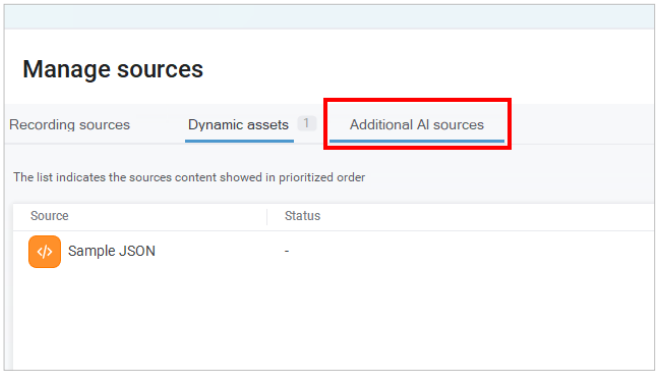
Click on the button **Save changes.**



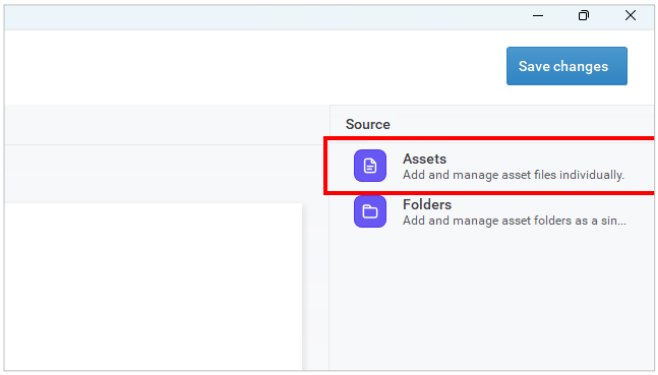
17.6.3. Add AI Sources

Feed your own PDFs into the AI as a knowledge source, so AI Chat answers users from your documents alongside your recordings, without limiting responses to recorded steps alone.

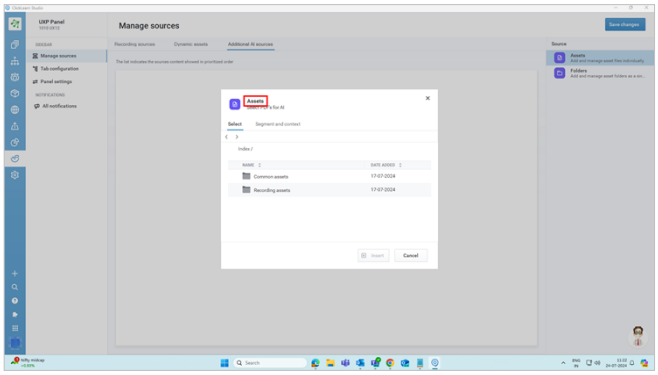
Click on the tab item **Additional AI sources**.



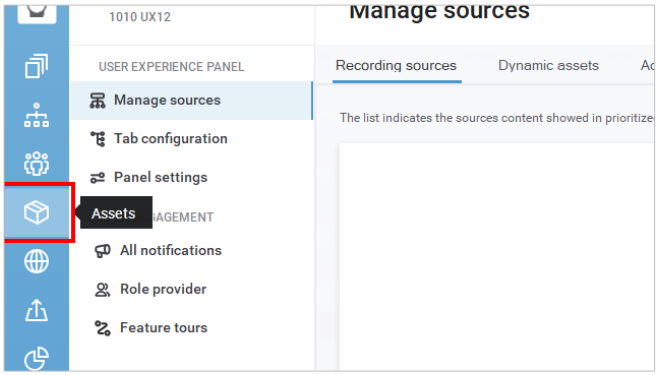
Assets allow you to add PDF files, which will be a source for AI. Select, drag, and drop Assets in the empty pane.



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.

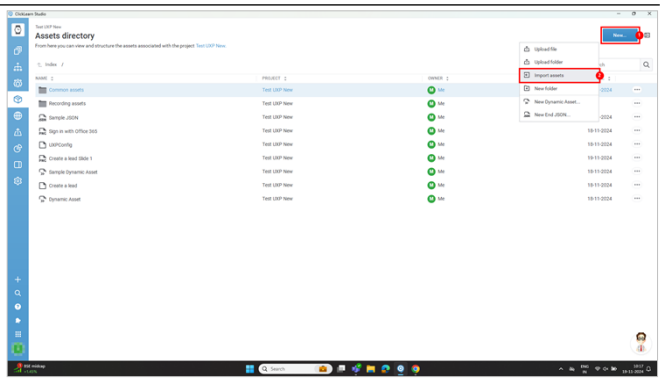


Click on the button **Assets.**

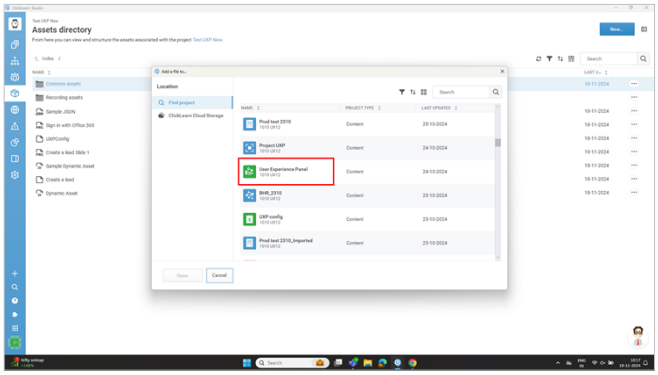


Import Assets

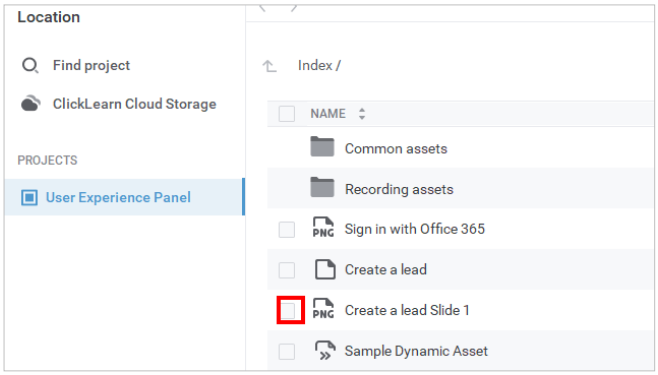
1. Click on the button **New.**
2. Click on the menu item **Import assets.**



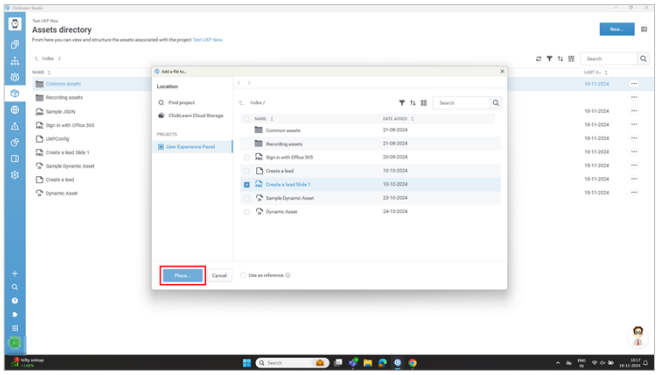
This opens a new dialog box that allows you to select the PDF files from the existing projects. Double-click on the project name you want to import.



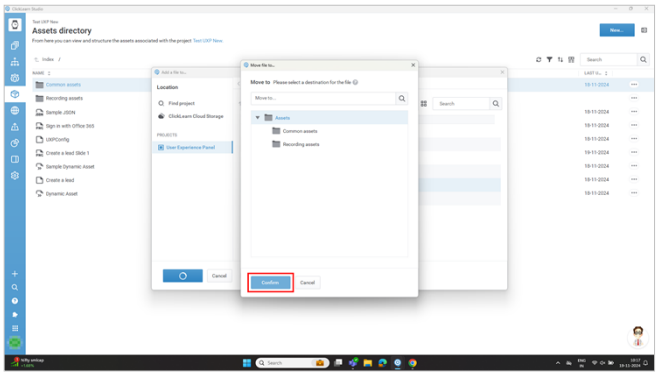
Click on the checkbox and select the file you wish to add.



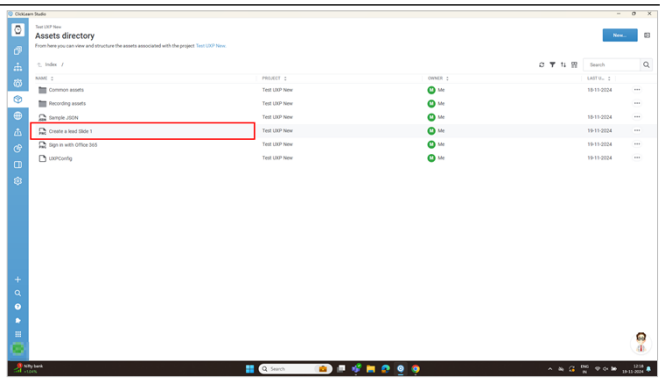
Once the files are selected, click on **Place**.



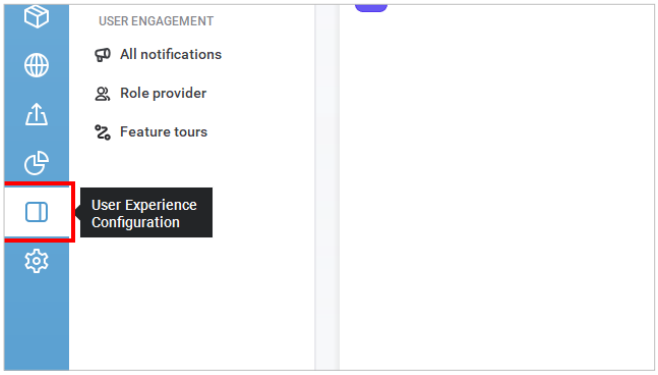
Click on the button **Confirm.**



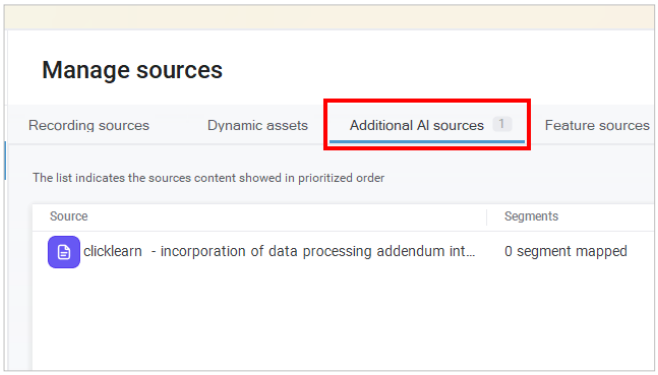
The PDF files are added to the assets.



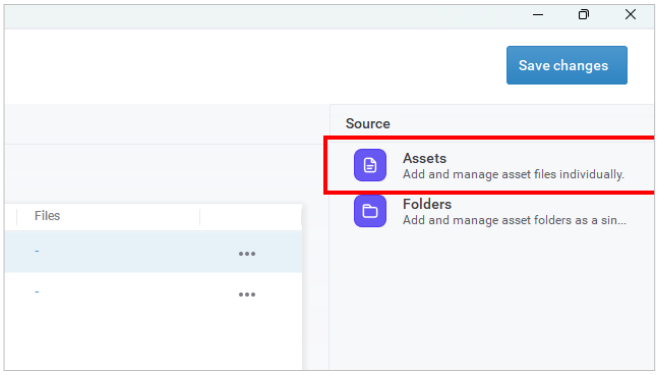
Click on the button **User Experience Configuration.**



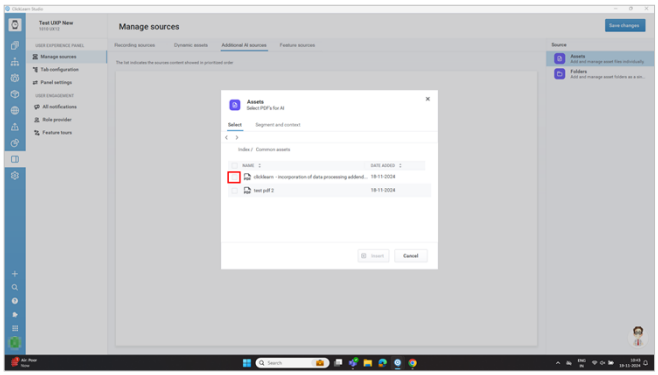
Click on the tab item **Additional AI sources.**



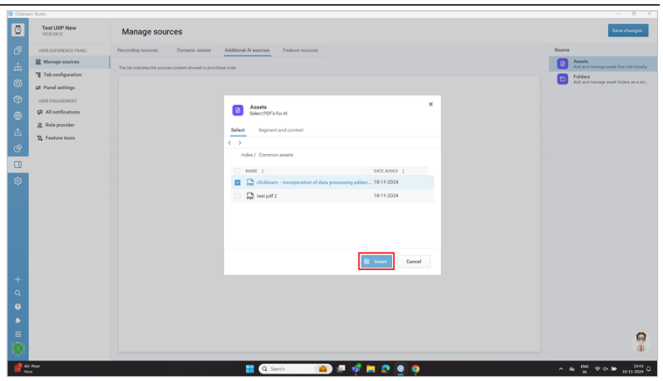
Select, drag, and drop the **Assets** in the empty panel.



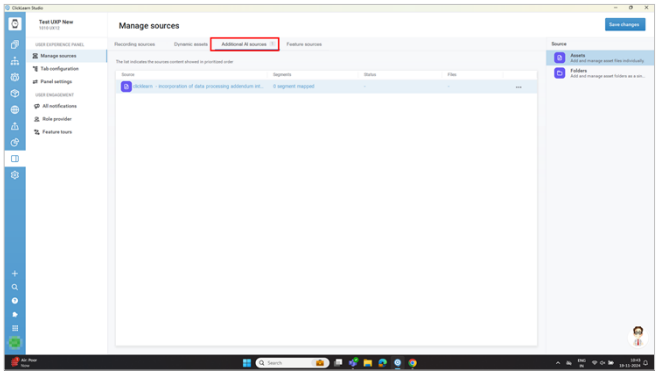
The PDF files you added to the assets are visible here. Click the **checkbox** to select the files to include as an Additional AI source.



Click on the button **Insert**.

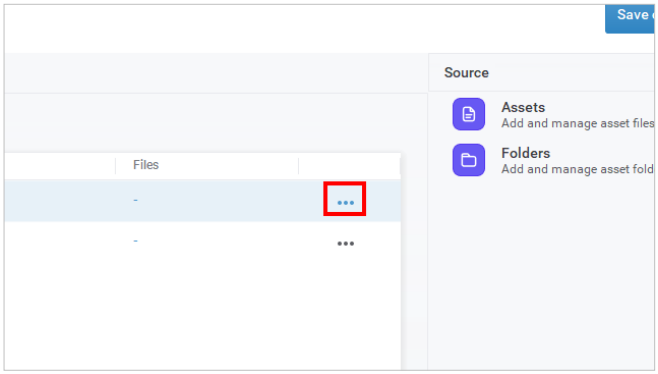


The PDF files are added in **Additional AI sources**.



17.6.3.1.1. Other options associated with Assets

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



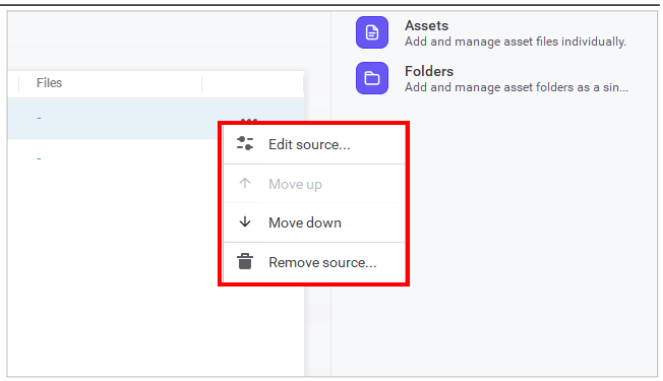
The other options associated with the Assets are:

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

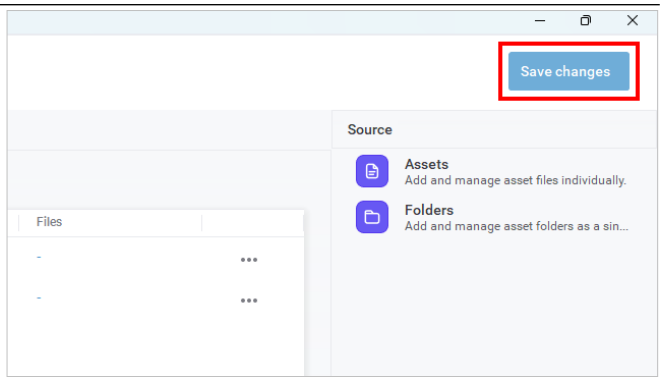
Move up: The selected file will move up by one step.

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

Remove source: This will delete the file.



Click on the button **Save changes**.



17.6.4. Get User Roles from Your Business System

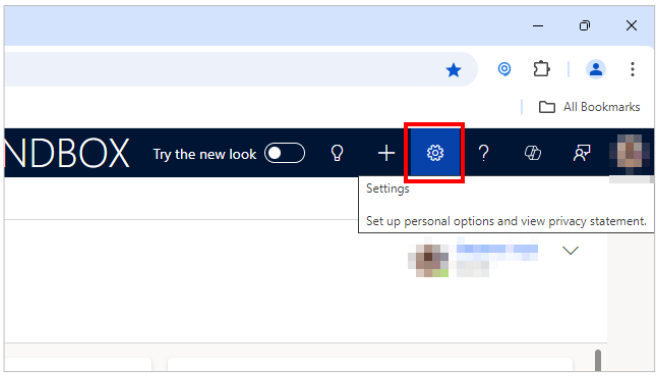
17.6.4.1. Get user roles from the system: Customer Engagement.

Pull user roles straight from Customer Engagement, so you map content to the exact roles that already exist in your CRM, without guessing names or mistyping them.

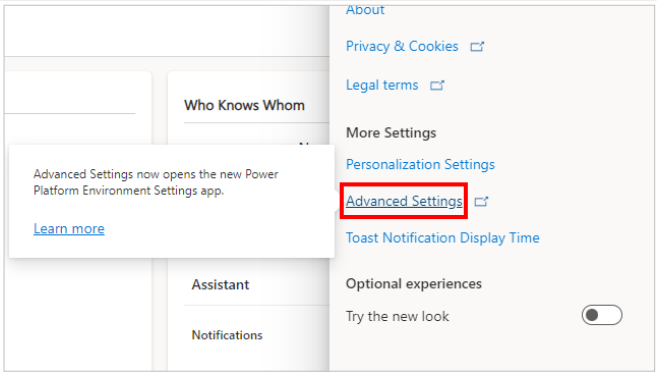
17.6.4.1.1. Introduction

To retrieve the user roles from the **Customer Engagement** system, follow the steps below.

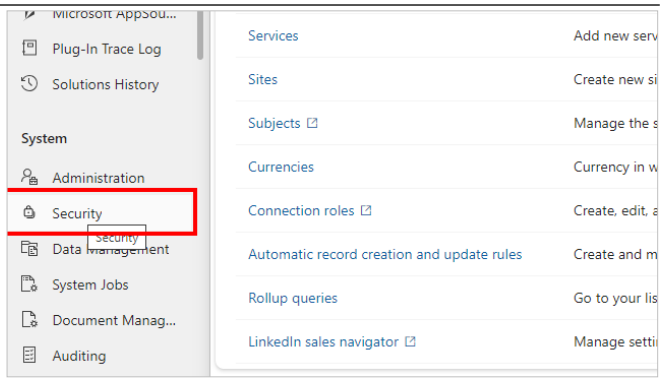
To check the user roles in the application, click **Settings**.



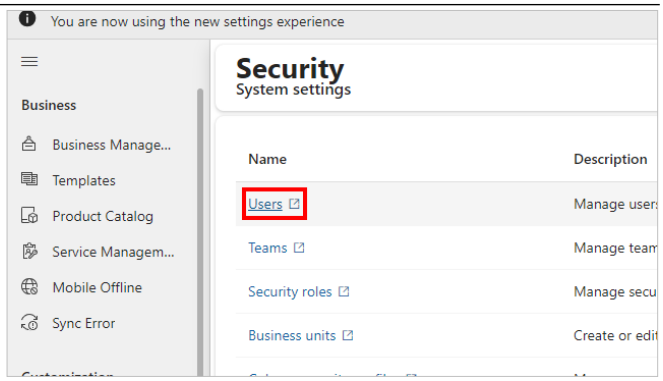
Click on the **Advanced Settings** button.



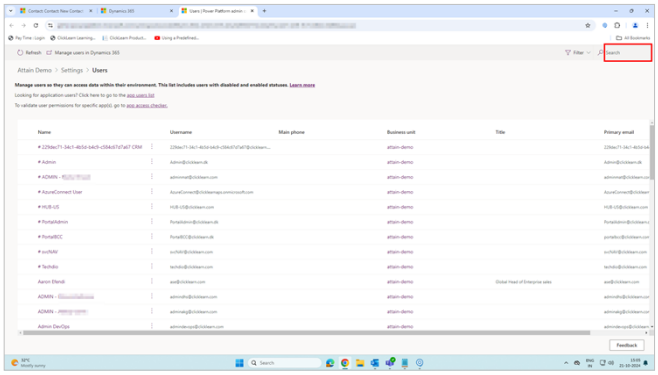
Click on the item **Security**.



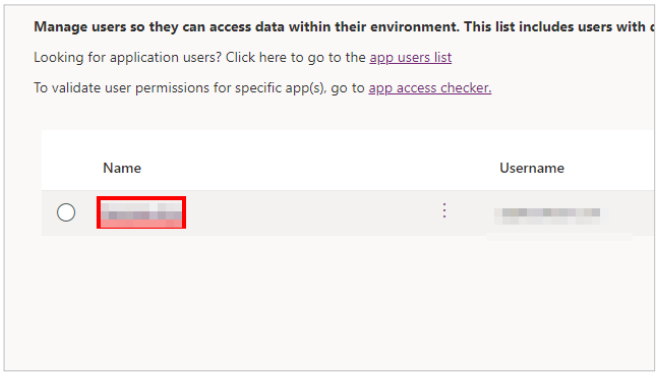
Click on the button **Users**.



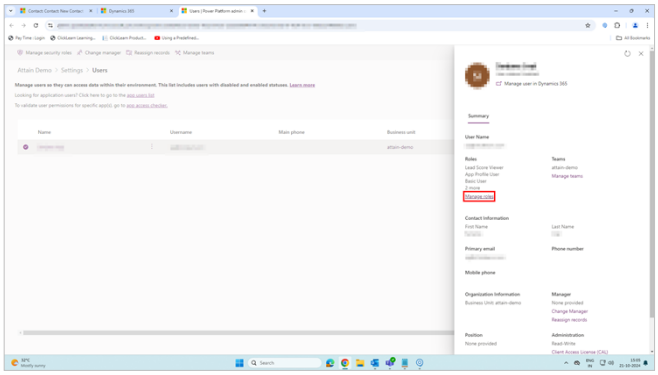
Click on the input field **Search**, type in the user name, and click Search.



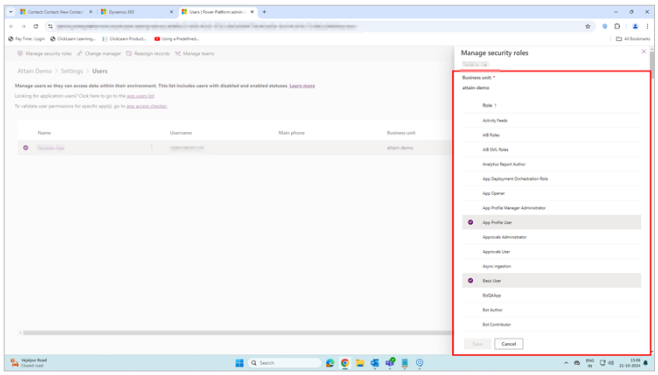
Click on the **user name** displayed in the search results.



Click on the button **Manage roles**.



This opens a new dialog box, **Manage security roles**, which displays the list of user roles in the CRM. These are the roles we are assigning to each segment.



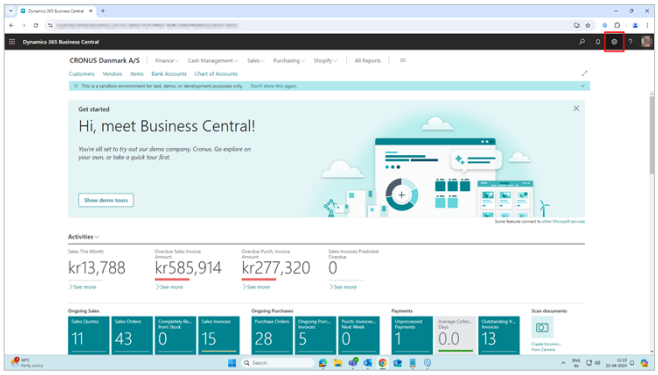
17.6.4.2. Get user roles from the system: Business Central

Pull user roles straight from Business Central, so you map content to the exact profiles already assigned in the application, without guessing names or mistyping them.

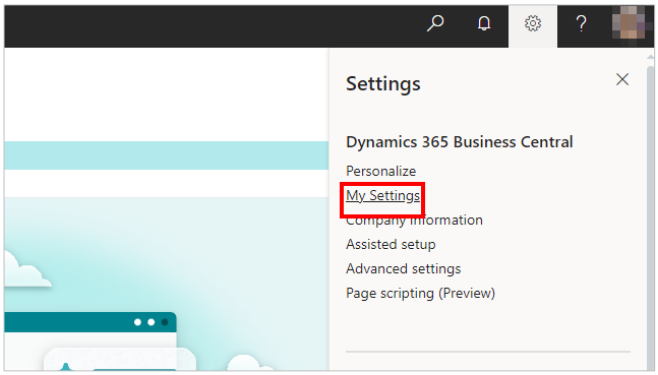
17.6.4.2.1. Introduction

To retrieve the user roles from the **Business Central** application, follow the steps below.

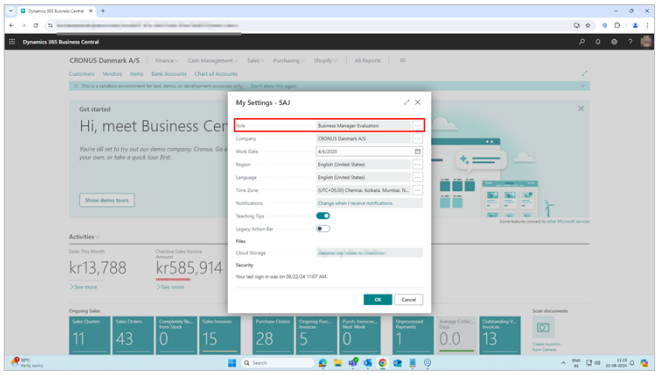
To view your user role in the application, click on **Settings**.



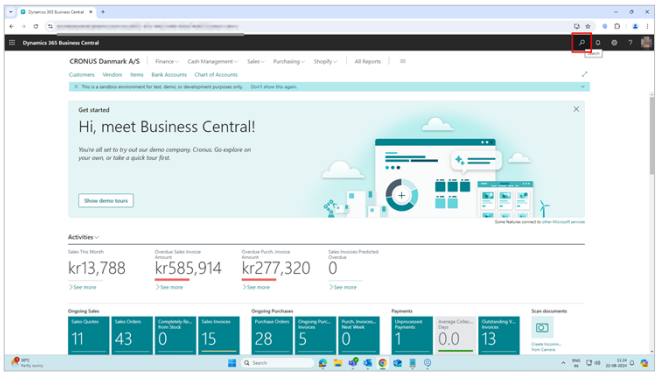
Click on the link **My Settings**.



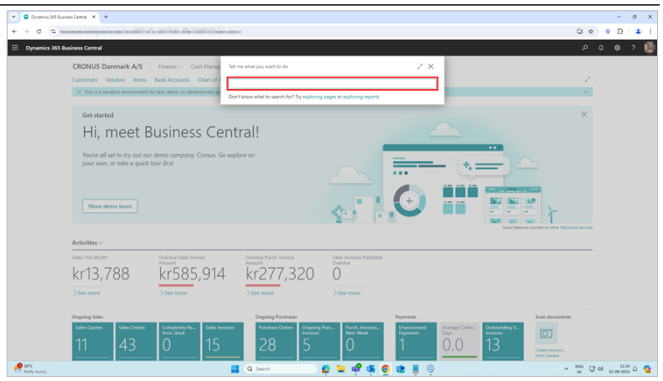
The user is assigned the **Role** of **Business Manager Evaluation** in this case.



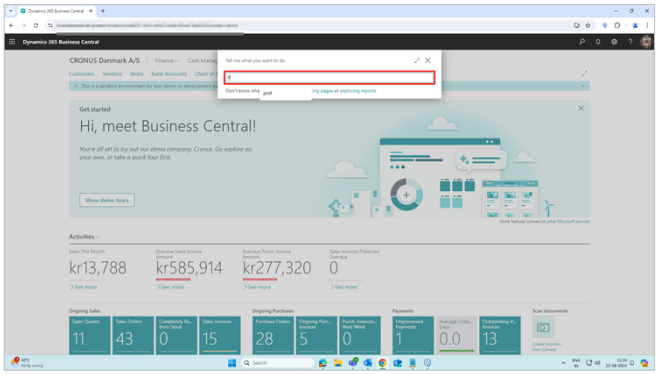
Click on the search button.



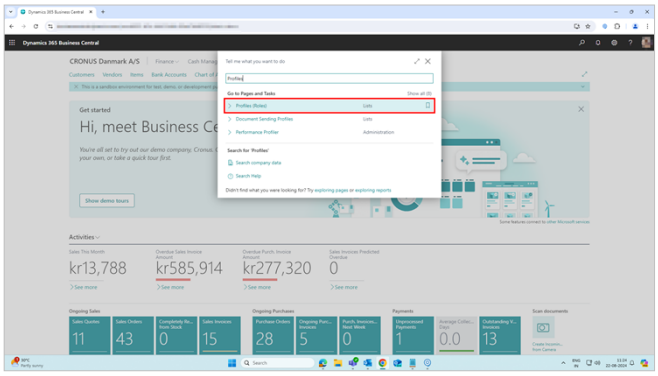
Click on the search box.



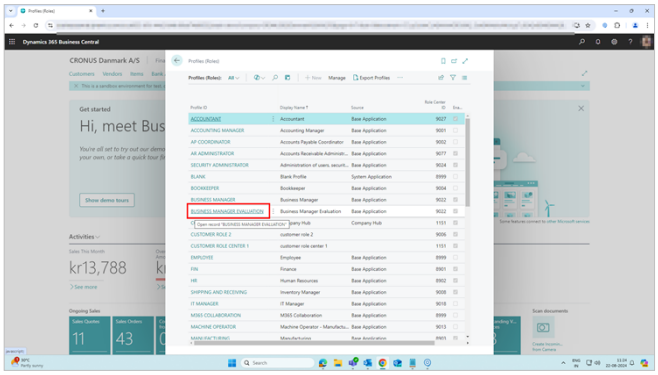
Enter the text **Profiles**.



Click on **Profiles (Roles) Lists**.



This opens up the list of user roles associated with that user. In this case, it is **BUSINESS MANAGER EVALUATION**.



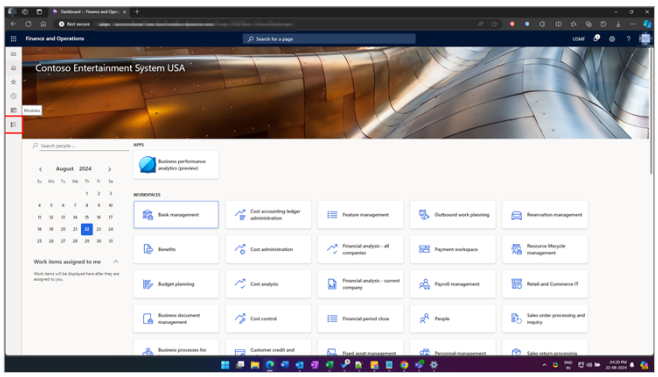
17.6.4.3. Get user roles from the system: Finance & Operations

Pull user roles straight from Finance & Operations, so you map content to the exact AOT role names defined in the application, without guessing names or mistyping them.

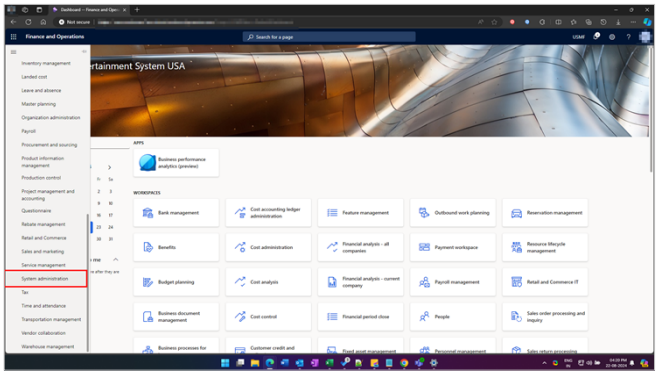
17.6.4.3.1. Introduction

To retrieve the user roles from the **Finance & Operations** application, follow the steps below.

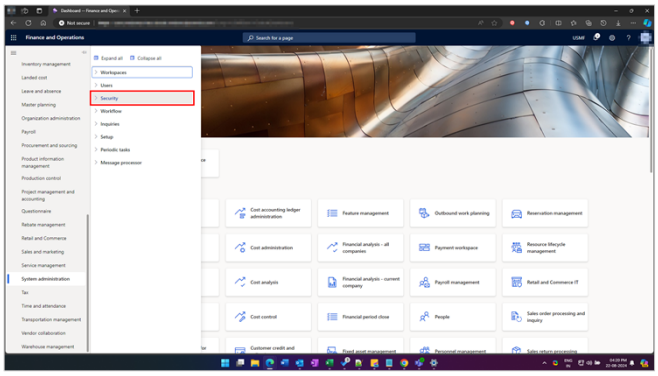
To view your user role in the application, click on **Modules**.



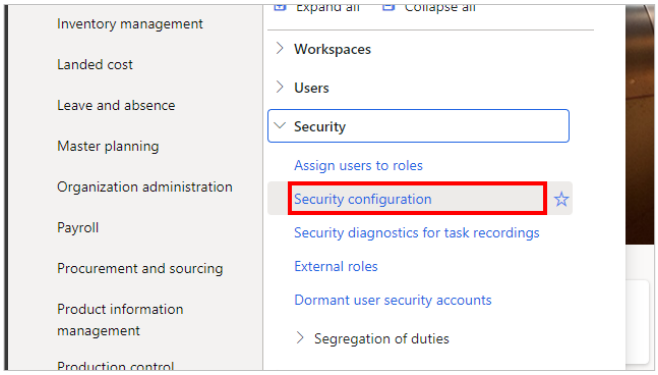
Click on the navigation module link: **System administration**.



Click on the link **Security**.

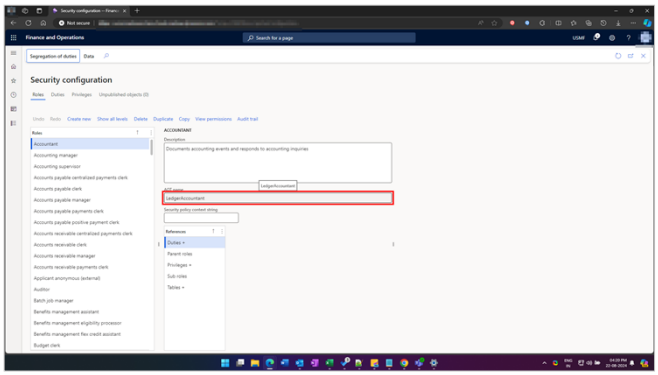


Click on the navigation item link: **Security configuration**.



This opens the list of user roles associated with that user. In this case, the **AOT name** for the user role is **Ledger Accountant**.

NOTE: Please make sure you enter the user role in **capital letters**.



17.6.4.4. Add customization in Acumatica

Pull user roles straight from Acumatica through the role provider, so UXP segments users and delivers content targeted to each role, without maintaining role lists by hand as users change.

17.6.4.4.1. Introduction

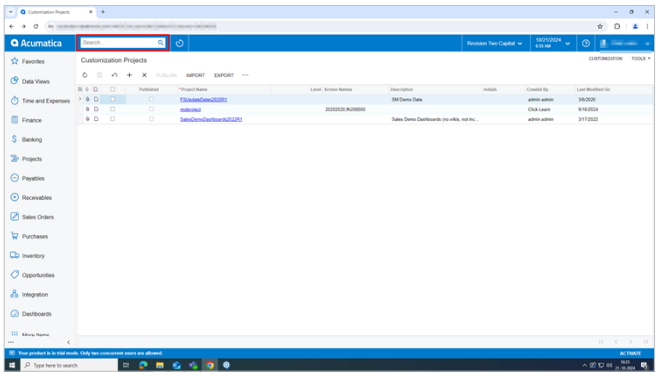
The role provider feature helps UXP understand which users have specific roles. For example, a user marked as "system administrator" will see everything on a system they manage. The same way, a user marked as an "author" will have content access limited to that role. By using the role provider, UXP can segment users according to roles and deliver targeted content according to needs.

Click on the below link to download the Acumatica extension file.
ClickLearn Acumatica extension

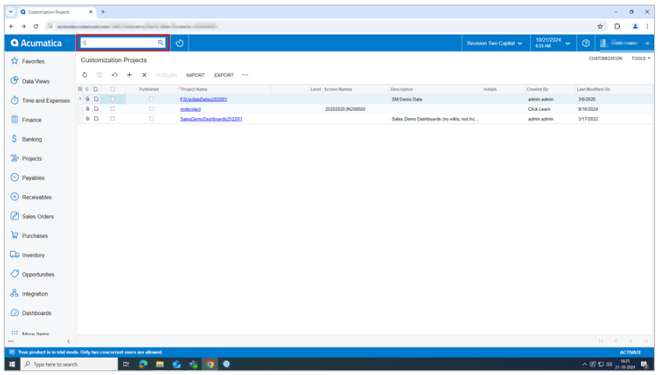
To retrieve the user roles from Acumatica, follow the steps below.

17.6.4.4.2. Add customization in Acumatica

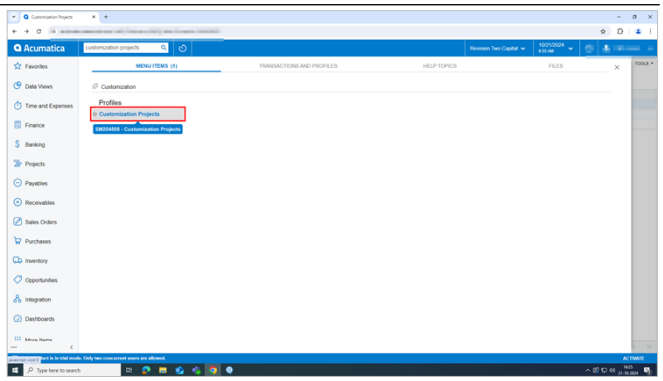
Click on the input field **Search.**



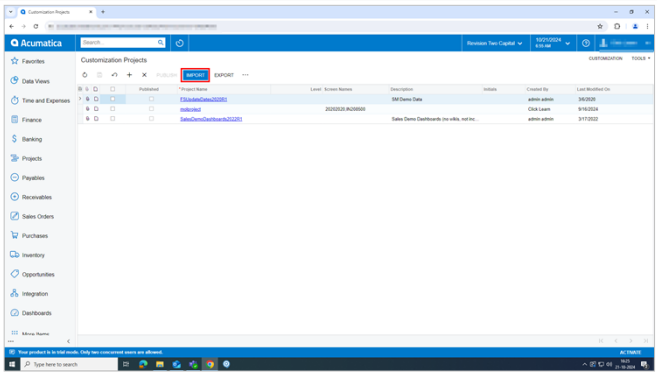
Enter the text **customization projects**.



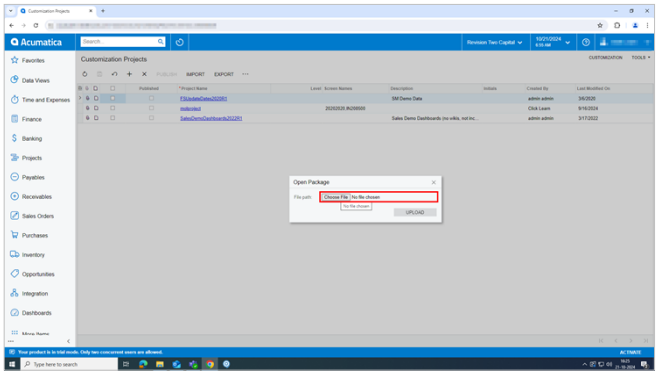
Click on the module item **Customization Projects.**



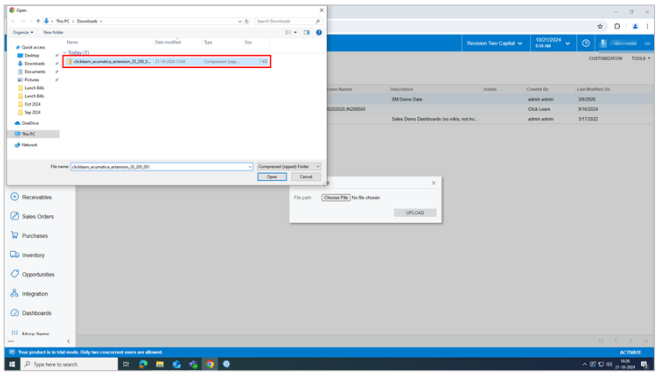
Click on the Toolbar button **Import.**



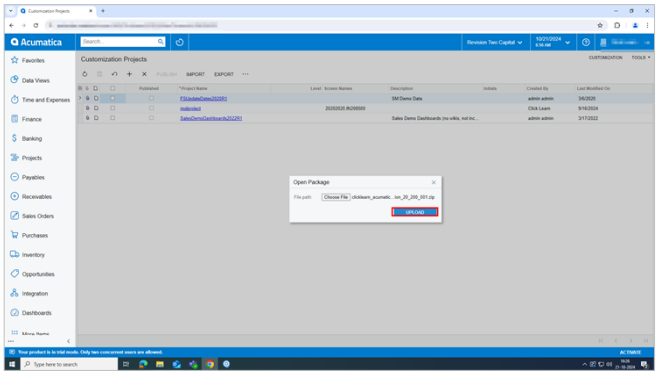
Click on the input field.



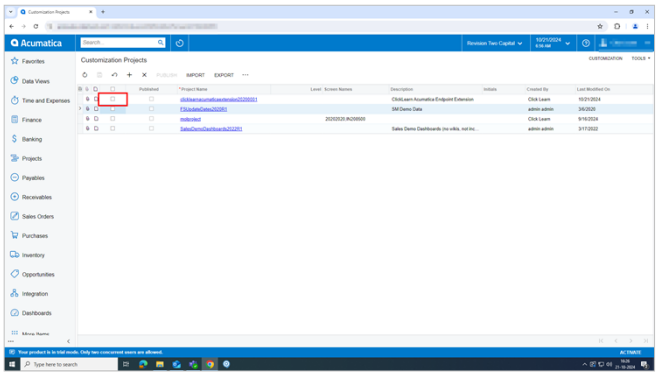
Select a downloaded file from the **Downloads**.



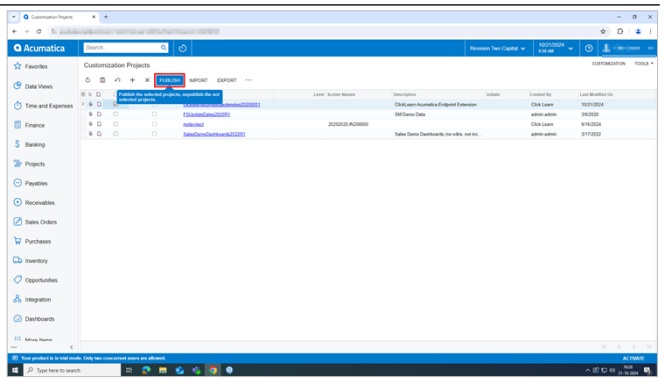
Click on the button **Upload.**



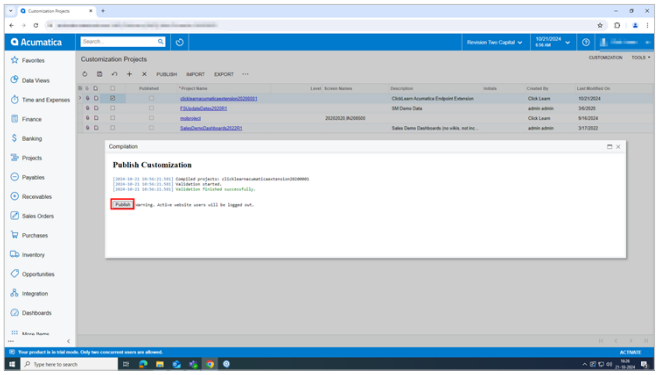
Click on the cell with the value **false.**



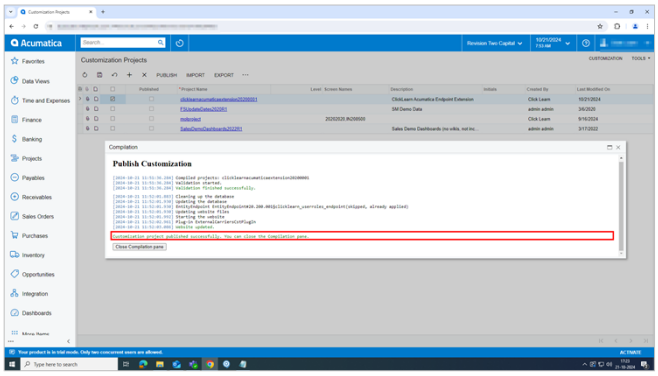
Click on the Toolbar button **Publish.**



Click on the button **Publish.**



Once you click on the **publish button**, the message **customization project published successfully** will appear.

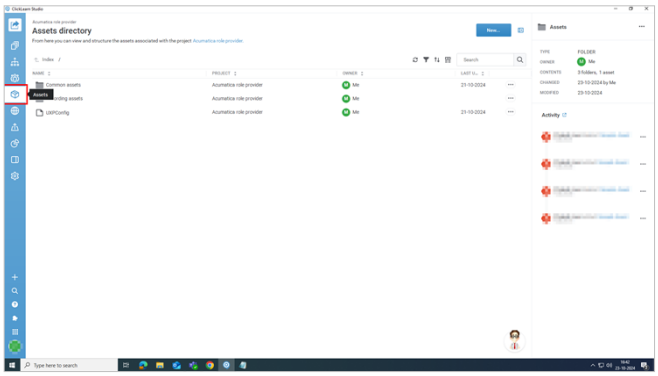


17.6.4.5. Role Provider Assets

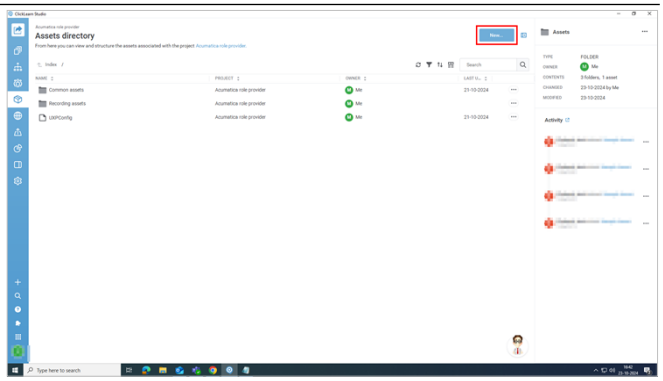
Create and configure Role Provider assets to manage user roles and permissions efficiently, ensuring accurate access control and streamlined user administration.

17.6.4.5.1. Role Provider as Dynamic Asset

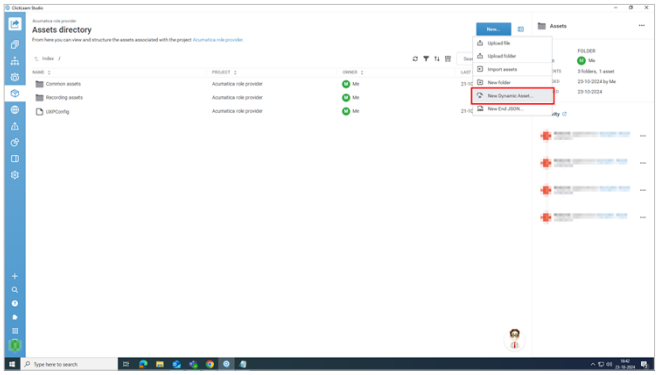
Click on the button **Assets.**



Click on the button **New.**

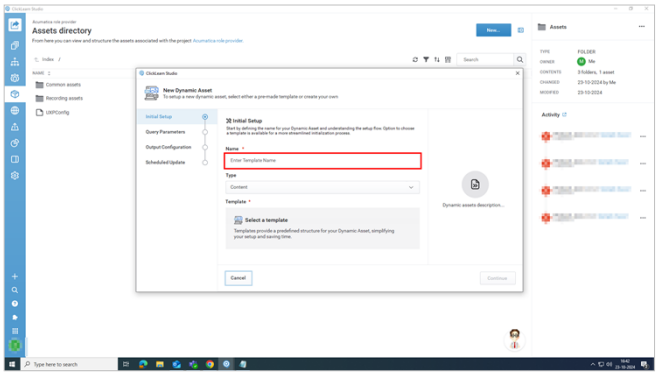


Click on the menu item **New Dynamic Asset.**

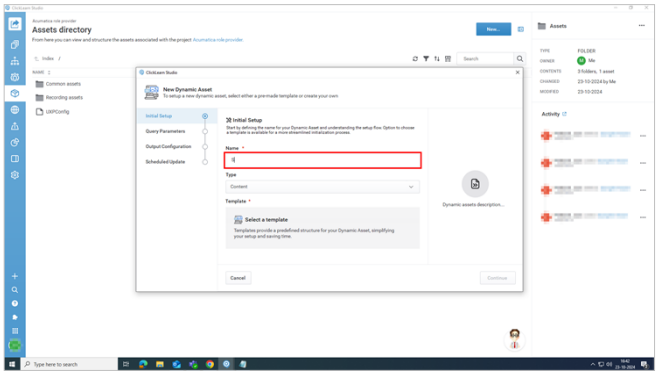


This opens up a new dialog box to create a new dynamic asset.

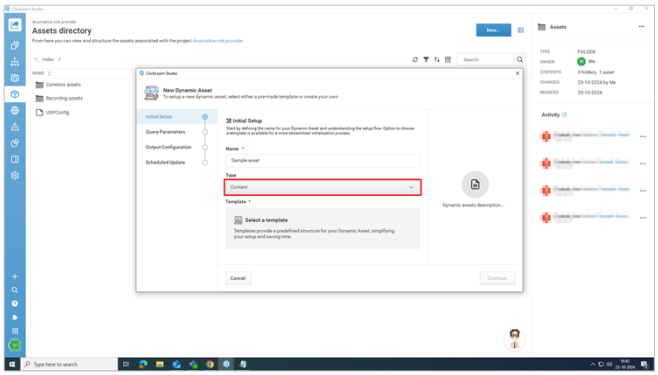
Click on the textbox **Dynamic Asset Name**



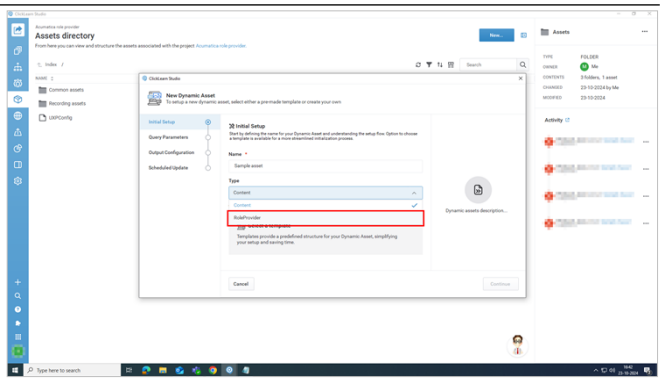
Enter the text **Sample Asset** as a name.



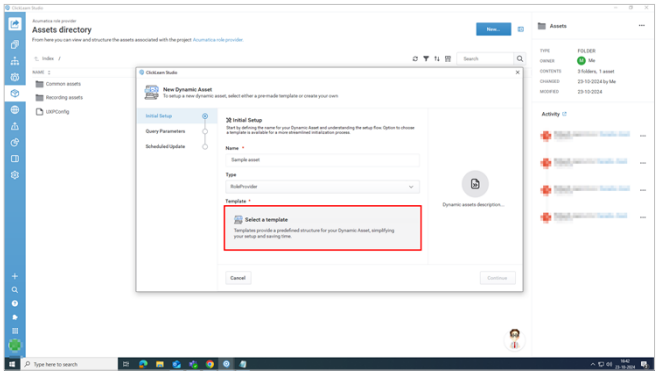
Click on the dropdown **Type**



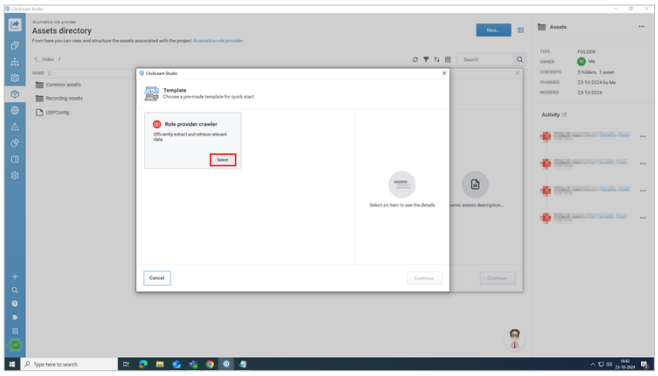
Click on the dropdown item **RoleProvider.**



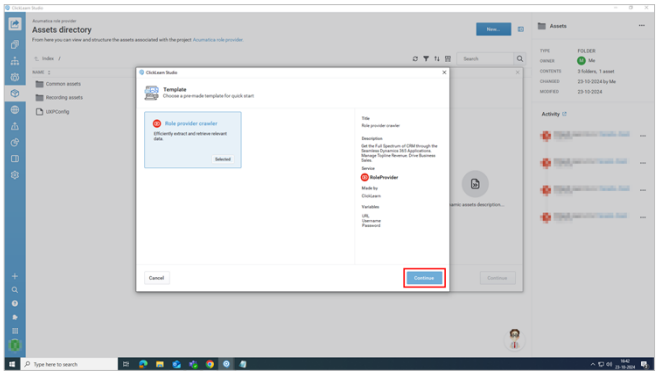
Click on the panel.



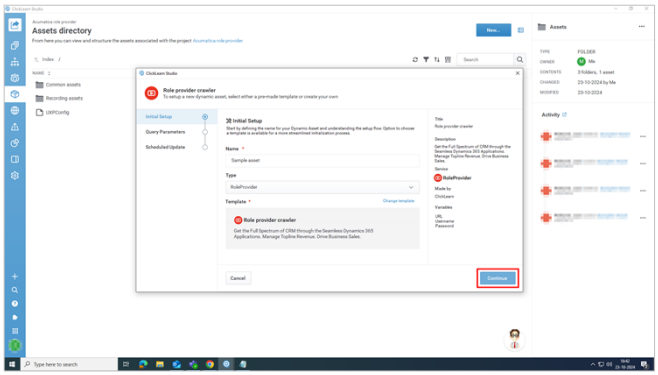
Click on the icon **Select.**



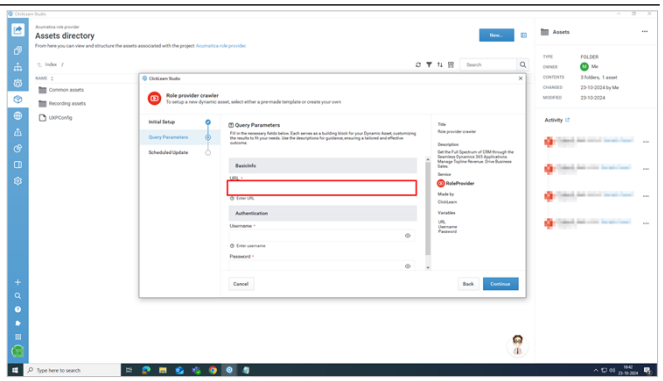
Click on the button **Continue.**



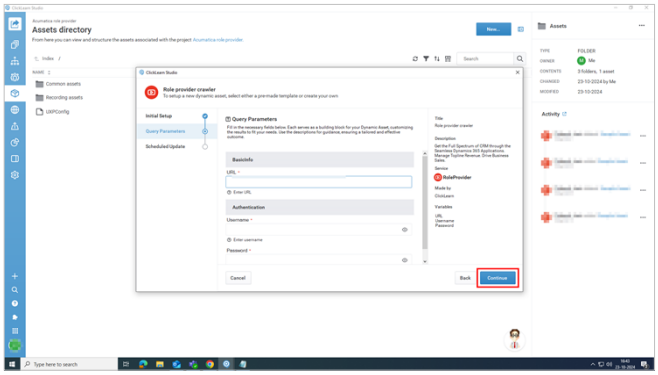
Click on the button **Continue.**



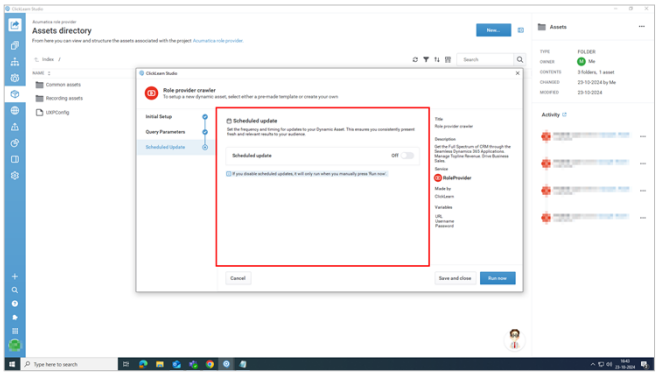
Click on the textbox **Data** to enter the URL.



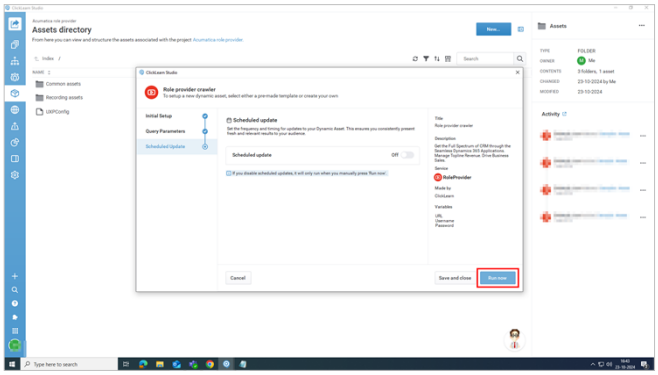
Click on the button **Continue.**



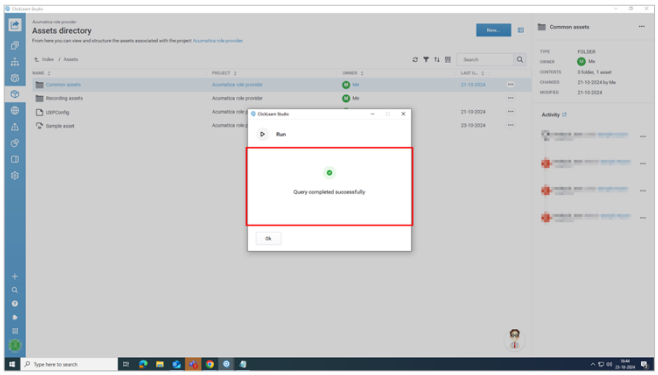
Click on the panel.



Click on the button **Run now.**



This opens a new dialogue box with the message that the **query completed successfully**.

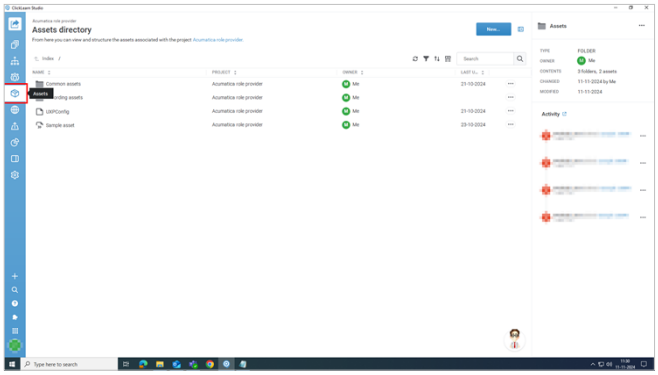


17.6.4.6. Role Provider as an End JSON

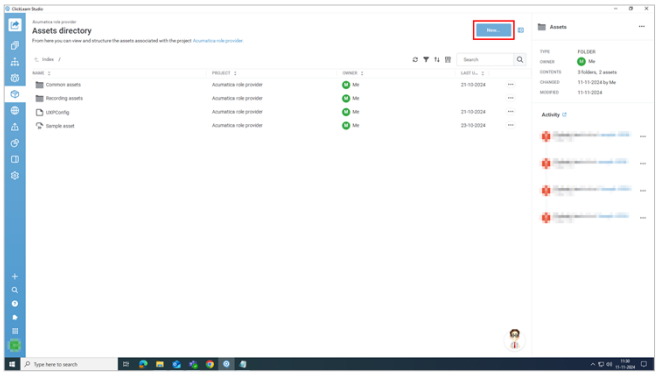
Create a Role Provider End JSON asset by importing user details from an Excel template to efficiently define user roles and streamline access management.

17.6.4.6.1. Role provider as an End JSON

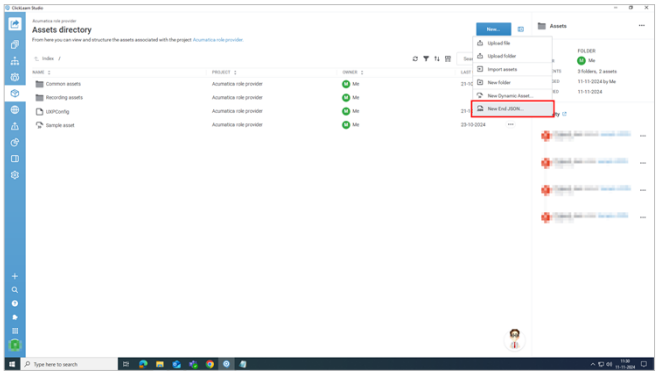
Click on the button **Assets.**



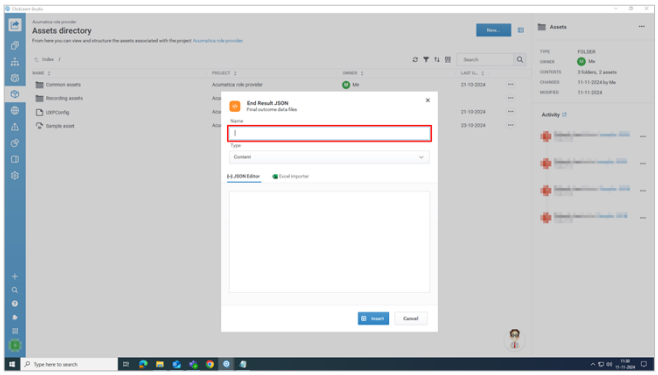
Click on the button **New.**



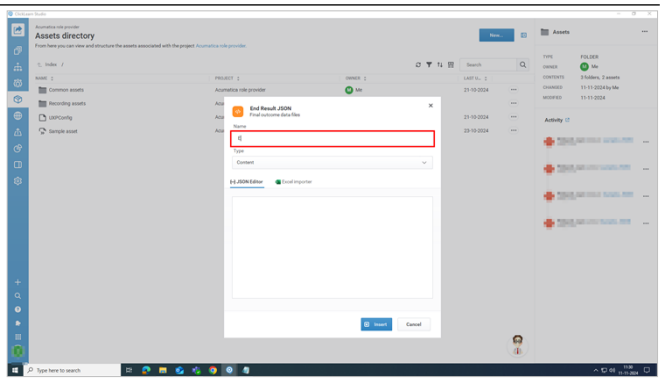
Click on the menu item **New End JSON.**



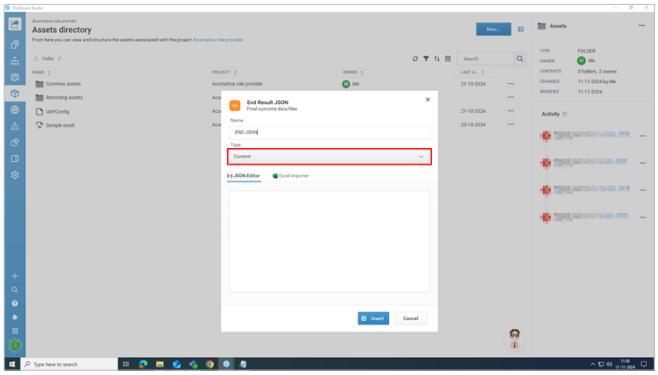
Click on the textbox **Asset Name.**



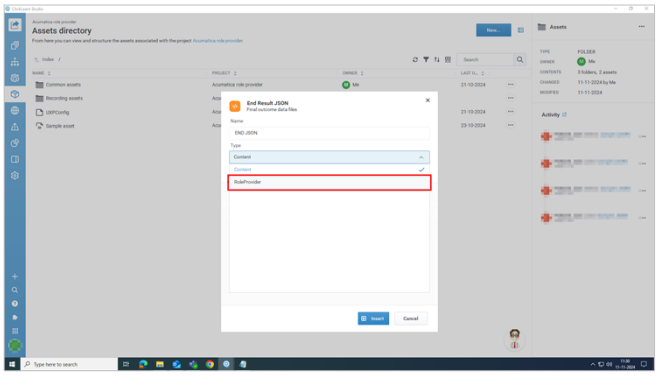
Enter the text **END JSON**.



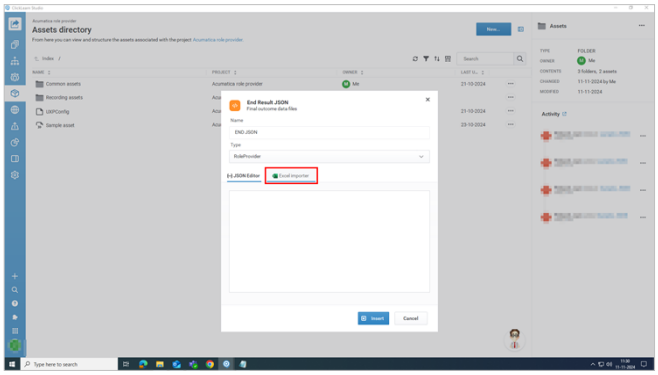
Click on the dropdown **Type.**



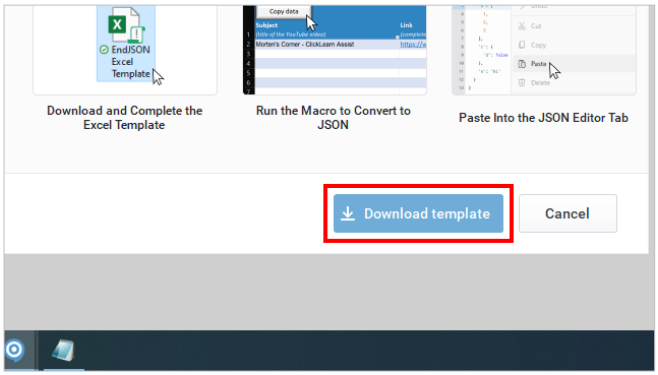
Click on the dropdown item **RoleProvider.**



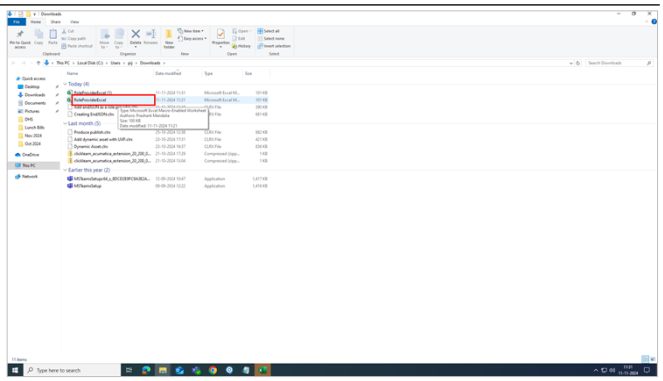
Click on the tab item **Excel importer.**



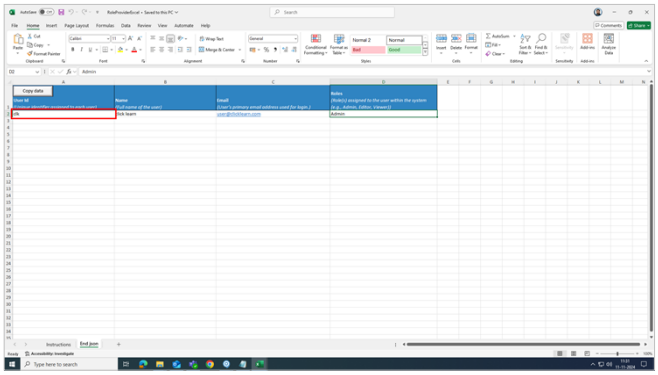
Click on the button **Download template.**



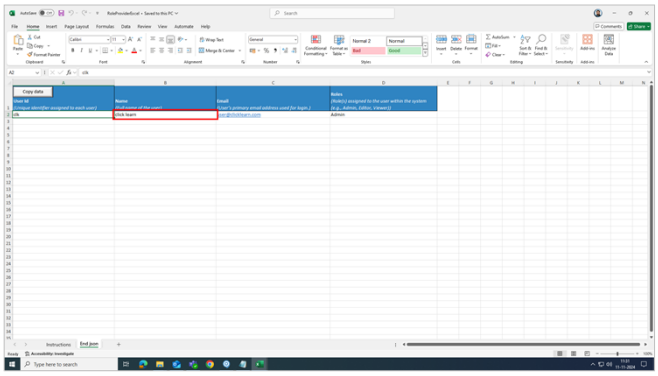
Double-click on the recently **downloaded file** from the local computer and open it.



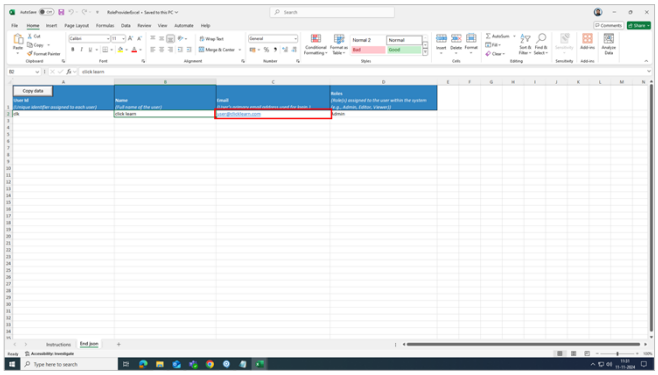
Click on the cell **A2** with the value **clk.**



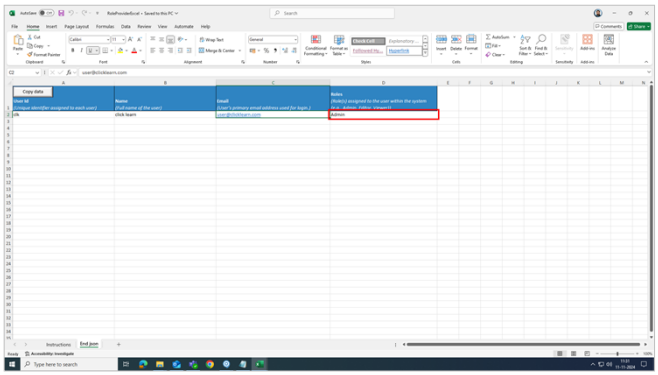
Click on the cell **B2** with the value **click learn.**



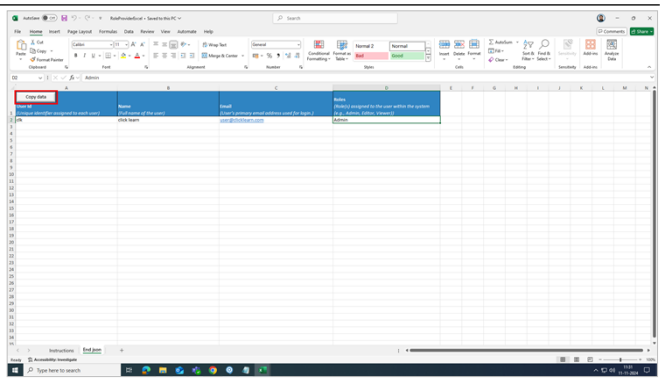
Click on the cell **CELL** with the value **user@clicklearn.com**



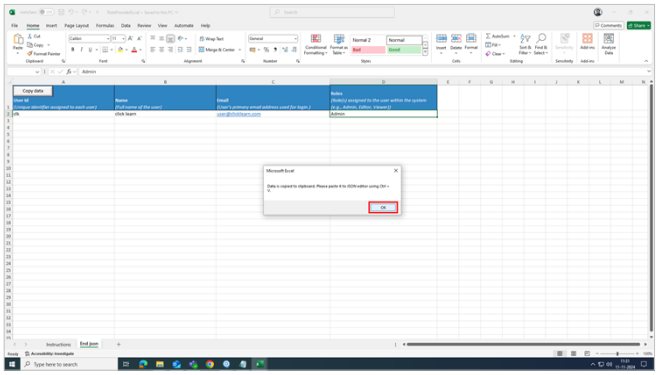
Click on the cell **D2** with the value **Admin.**



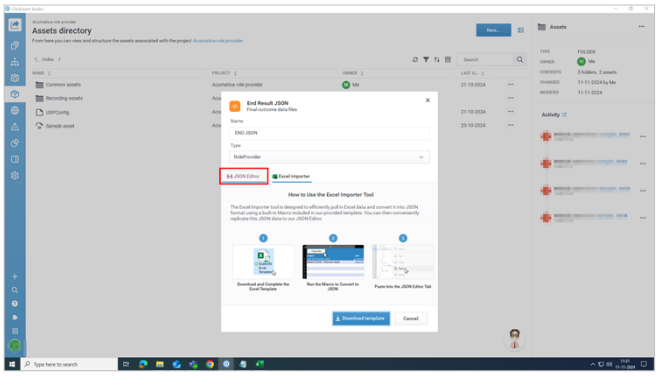
Click on **Copy data.**



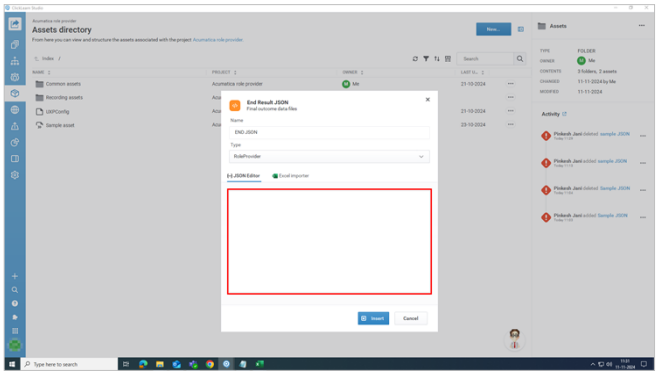
Click on the button **PushButton/push button**.



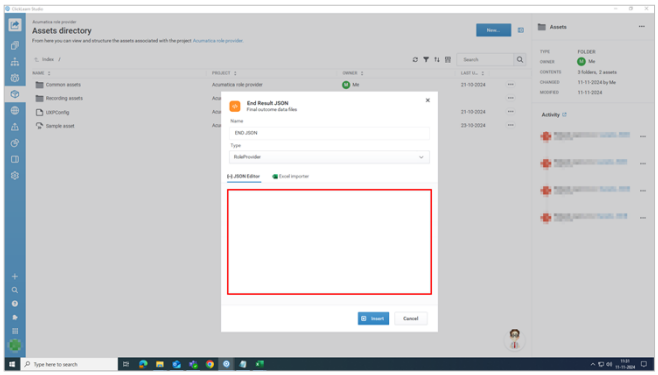
Click on the tab item **JSON Editor.**



Click on the text editor **ContentJson.**

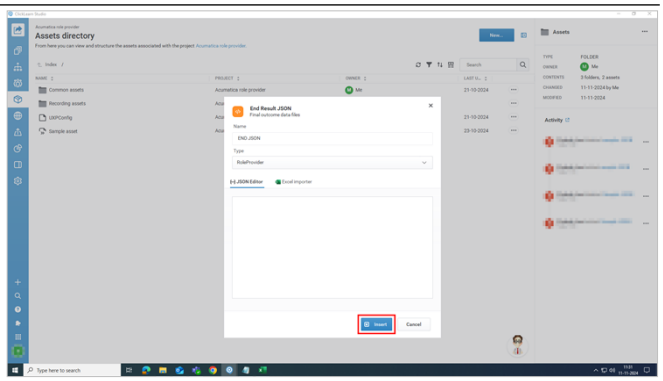


Press **CTRL+v**.



Click on the button **Insert.**

Once you hit the button Insert, you will be notified with the message **File created successfully**.

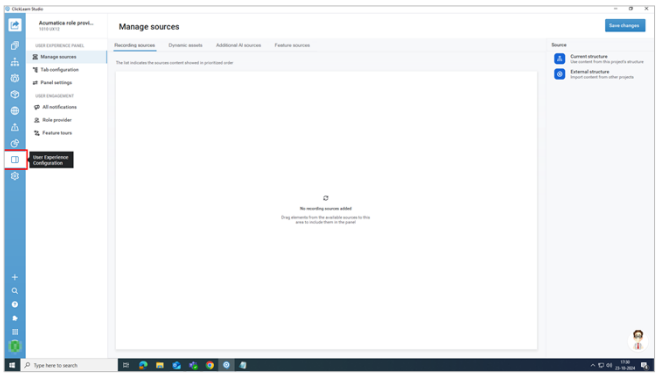


17.6.4.7. Add Assets to the Role Provider

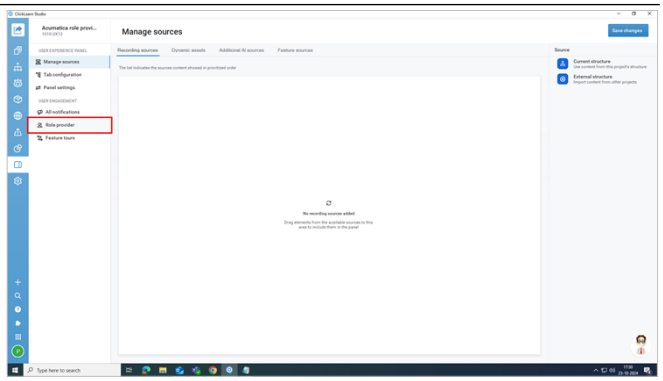
Add Role Provider assets to Acumatica to configure user roles and access permissions, and keep user details up to date by refreshing and publishing the latest data.

17.6.4.7.1. Add Assets to the role provider

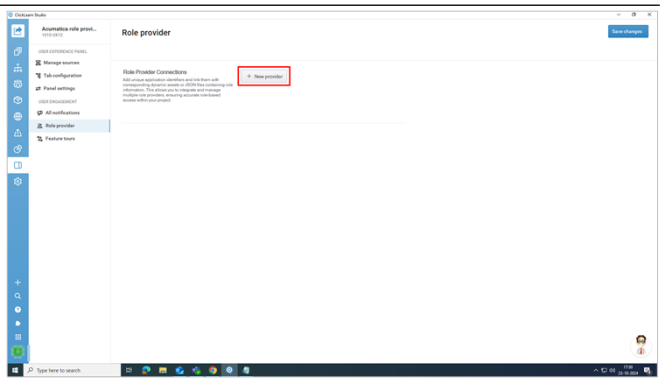
Click on the button **User Experience Configuration.**



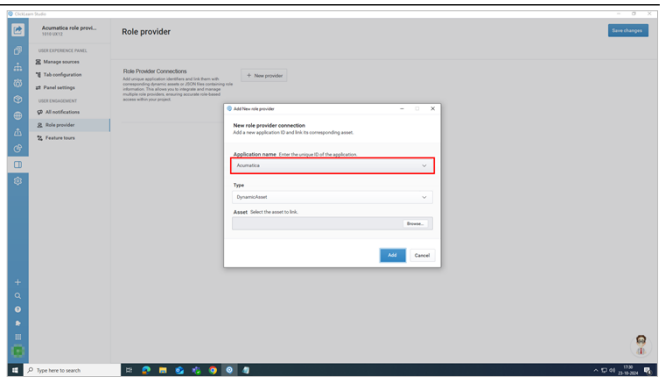
Click on the button **Role provider.**



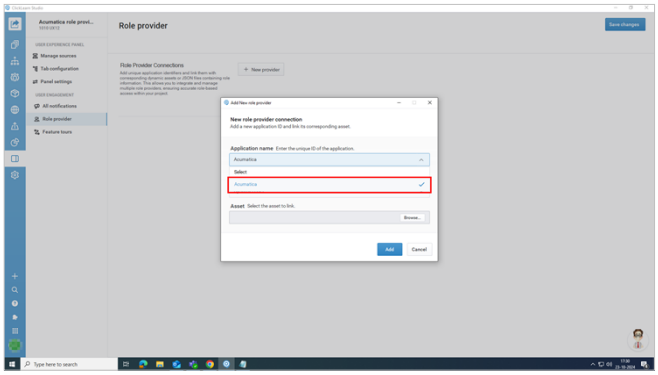
Click on the button **New provider.**



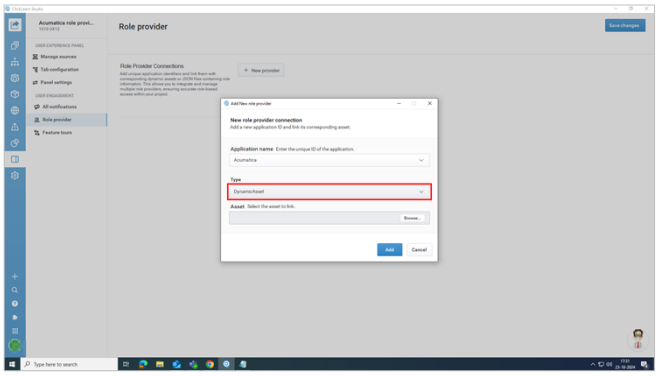
Click on the dropdown **Application Name.**



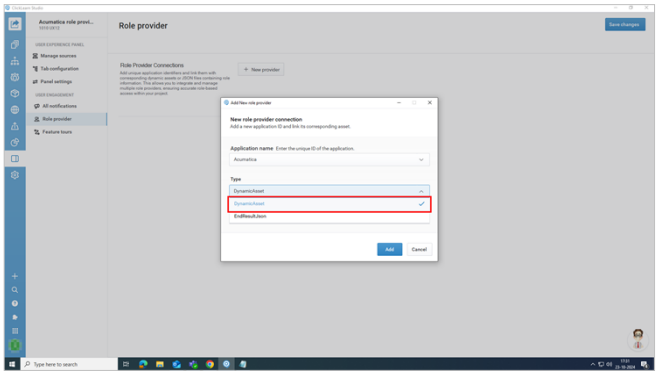
Click on the dropdown item **Acumatica.**



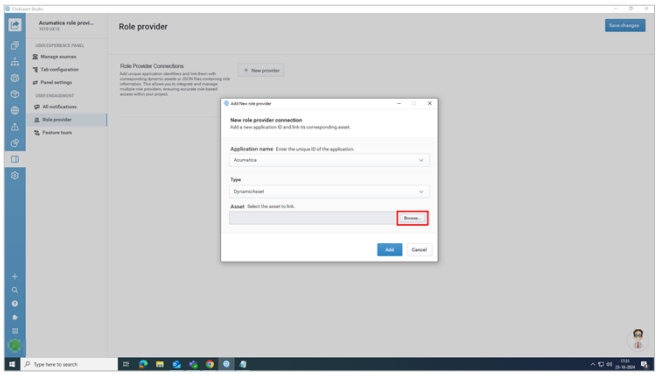
Click on the dropdown **Template Type.**



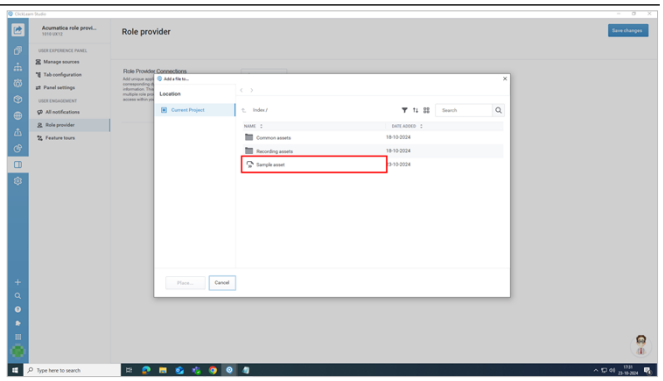
Click on the dropdown item **DynamicAsset.**
If you want to create a role provider as an EndResultJson, you can choose another option, which is **EndResultJson**.



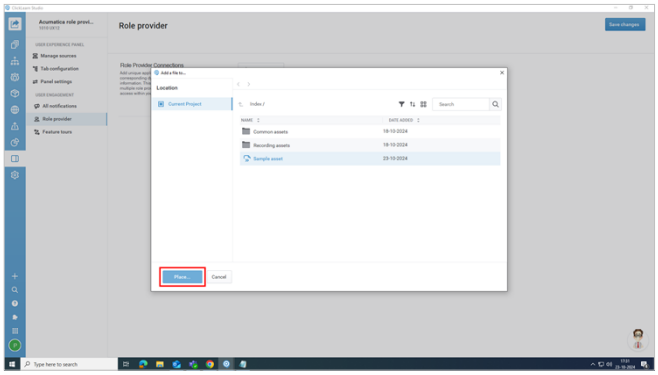
Click on the button **Browse.**



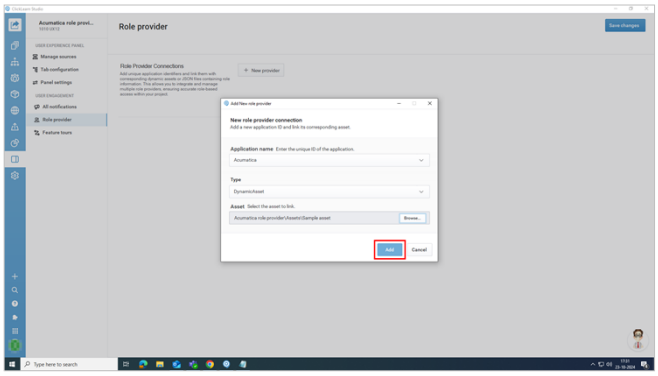
Click on the cell **NAME** with value **Sample asset.**



Click on the button **Place.**

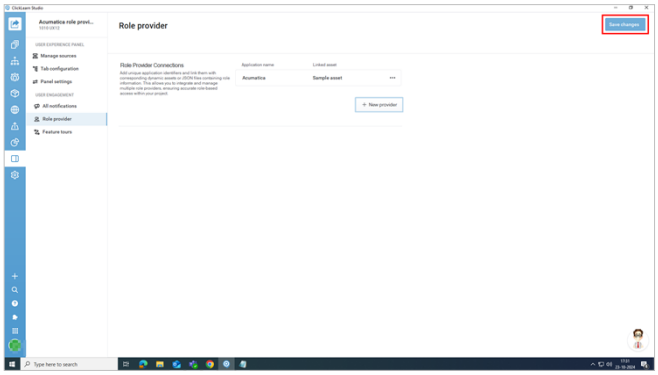


Click on the button **Add.**



Click on the button **Save changes.**

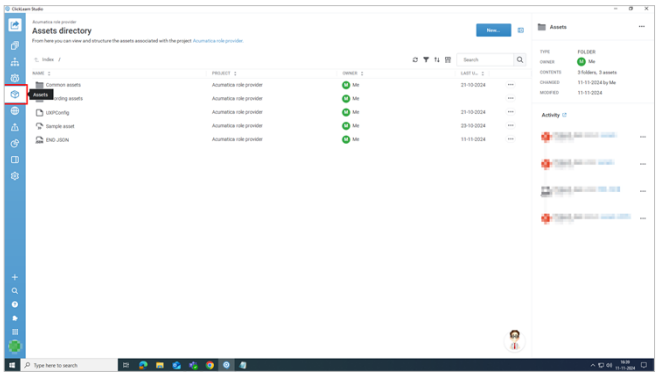
Make sure you produce and publish after adding it.



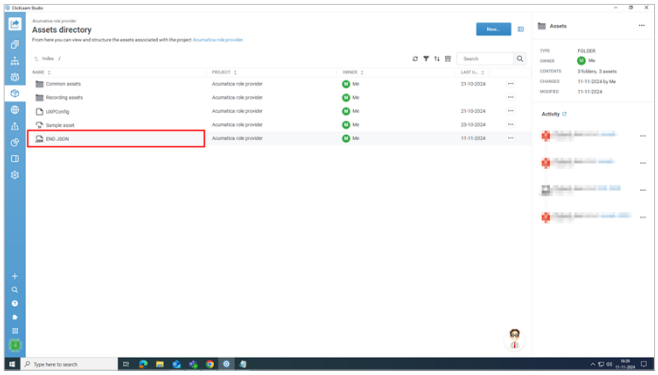
17.6.4.7.2. Update new Data

If there is **updates in User details and roles** in Acumatica, you just need to re-run the Dynamic Asset followed by clicking **Set Live** from the context menu of Dynamic Asset.

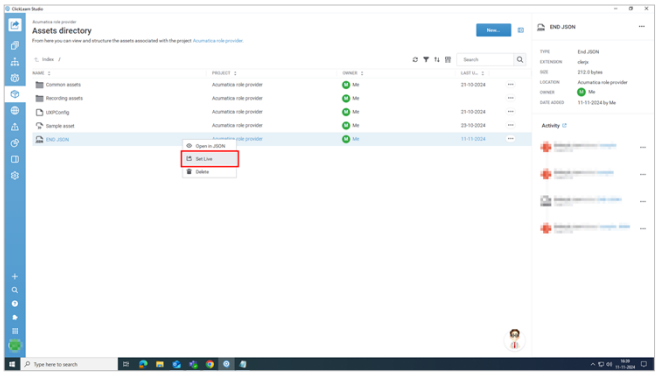
Click on the button **Assets.**



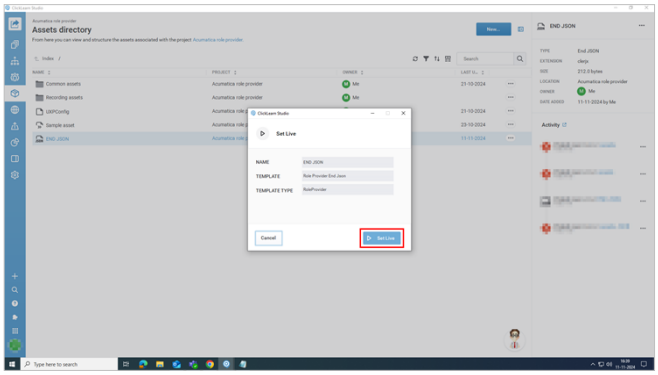
Right click on the gridview cell **NAME** with data **END JSON.**



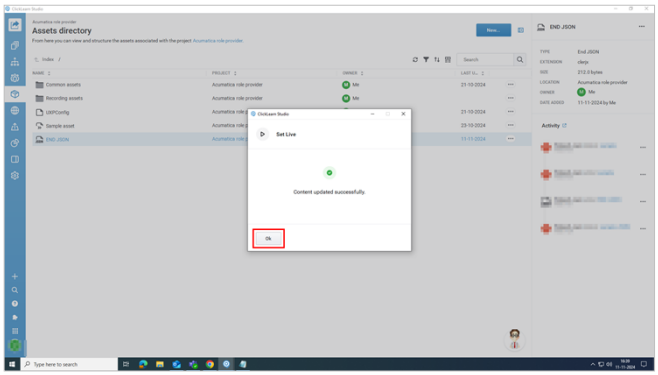
Double click on the menu item **Set Live.**



Click on the button **Set Live.**



Click on the button **Ok.**



17.7.Tab Configuration

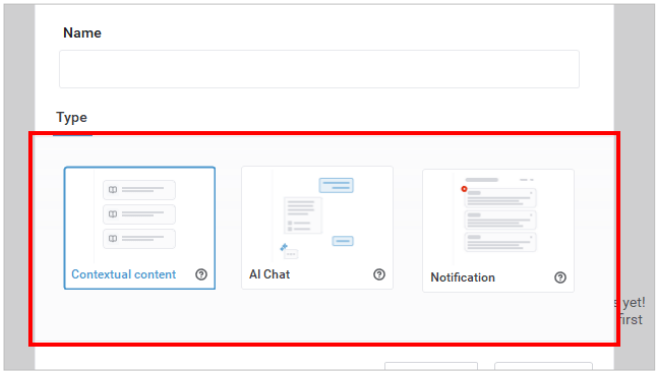
17.7.1. Configure the Contextual Content Tab

Build a tab that shows the right content for wherever users are, so recordings, JSON sources, and grouped topics surface by context and filter rules, without users searching for what applies to their screen.

17.7.1.1. Introduction

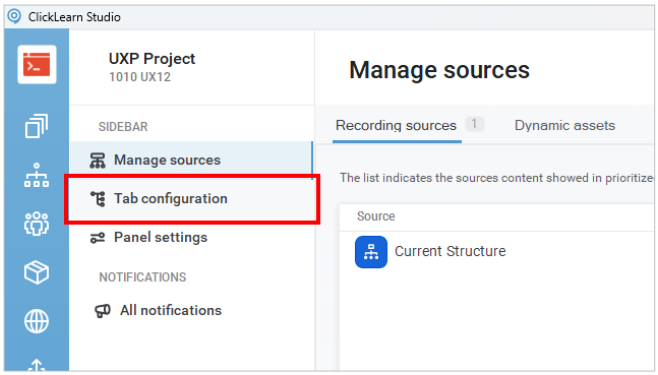
You can create three types of tabs for the UXP panel.

- **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.

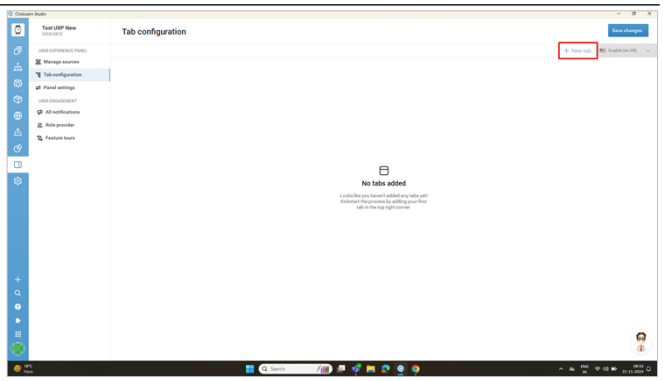


17.7.1.1.1. Steps to create a contextual content tab

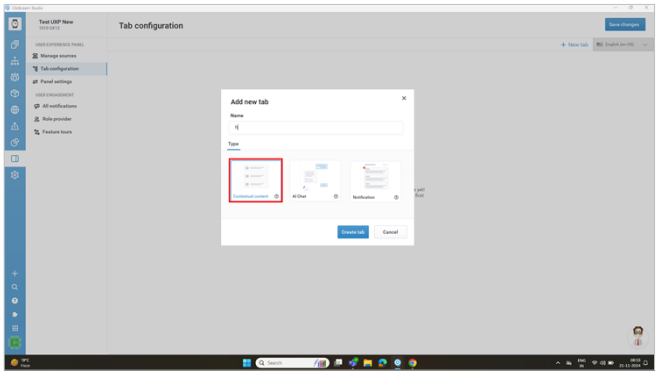
Click on the button **Tab configuration**.



Click on the button **New tab.**

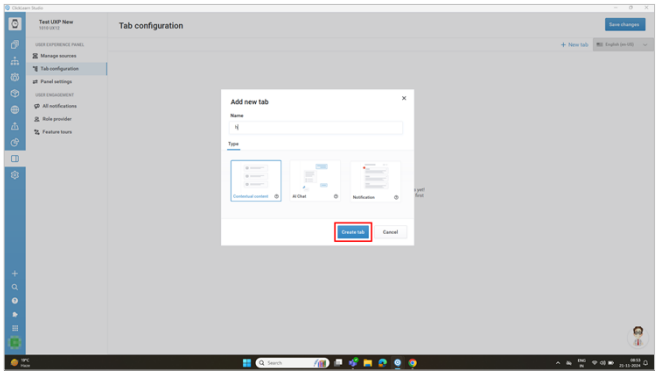


Click on the item **ContextualContent**.

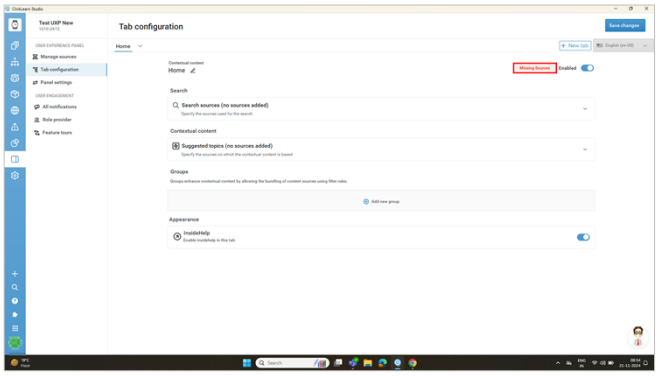


You can name the tab based on your project requirements. In our case, we are creating a contextual tab called Home.

Type the name of the tab and click on the button **Create tab**.



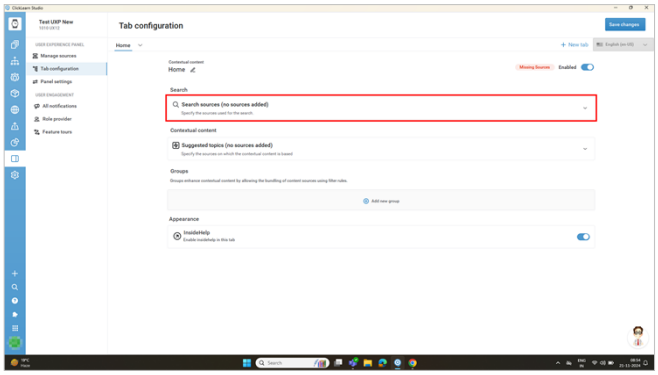
We have created the Home tab. It says **Missing sources**; we still need to add sources for this tab.



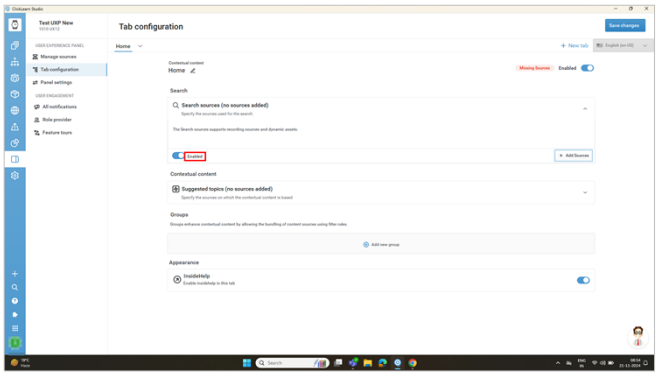
17.7.1.1.1. Contextual Search

17.7.1.1.2. Search sources: Adding recording source

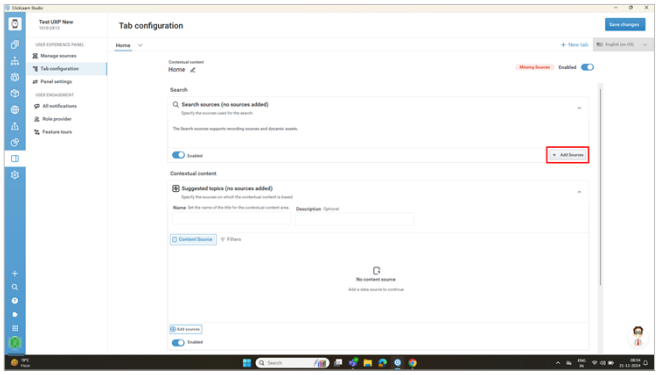
Click on the collapsible panel **Search sources (no sources added).**



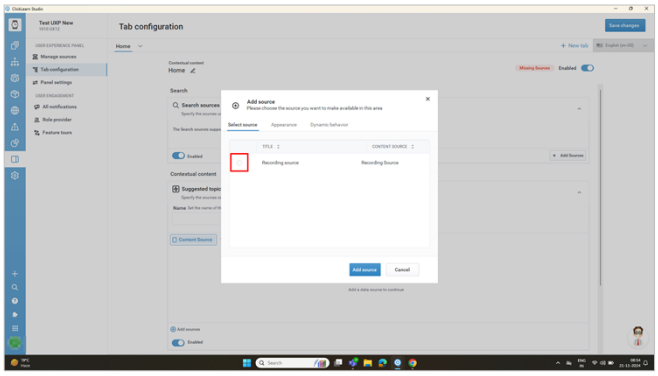
Click on the label **Enabled**. You can enable/disable this based on your project needs.



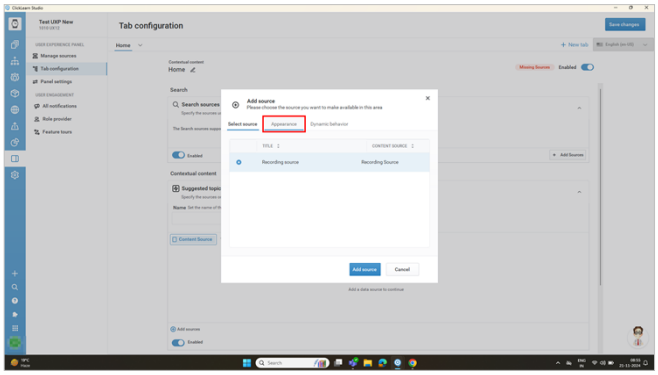
Click on the button **Add Sources.**



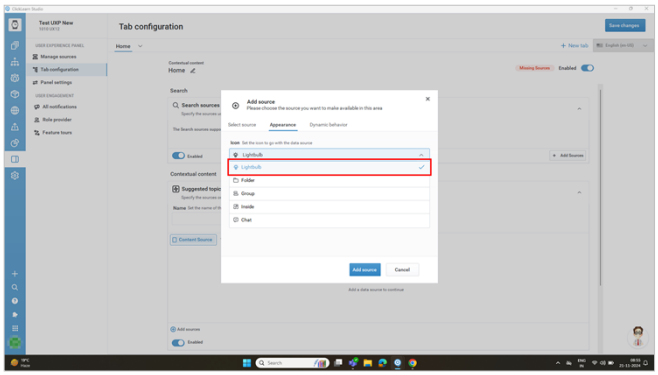
Click on the radio button: **Recording source**.



Click on the tab item **Appearance.**



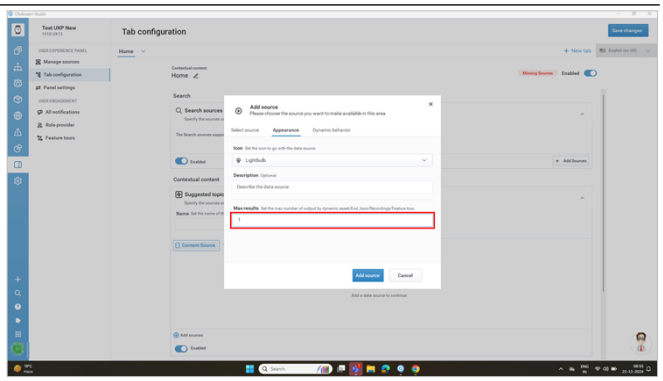
Click on the dropdown Icon and select **Lightbulb**. You can choose the icon that matches your data source.



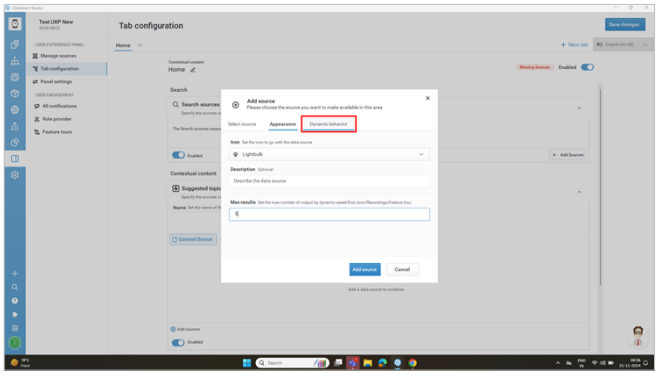
Description: With this option, you can describe the data source.

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

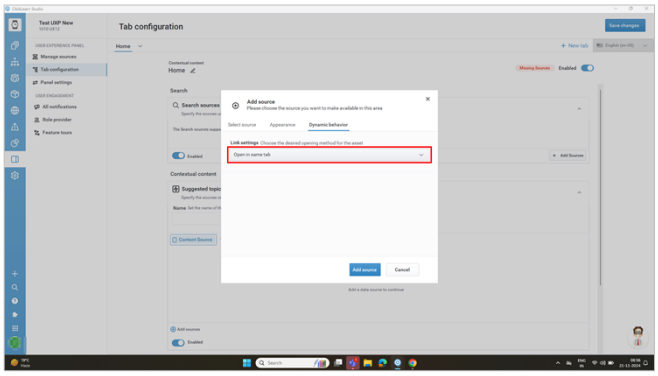
Click on the textbox **Max Results** and enter the maximum count of items to be displayed.



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



Click on the dropdown **Behaviour.**

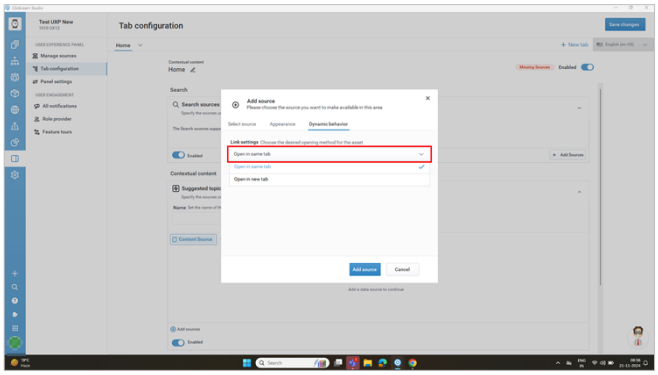


Dynamic behavior is how you want your recordings to open. Click on the dropdown item: Open in same tab. There are two options.

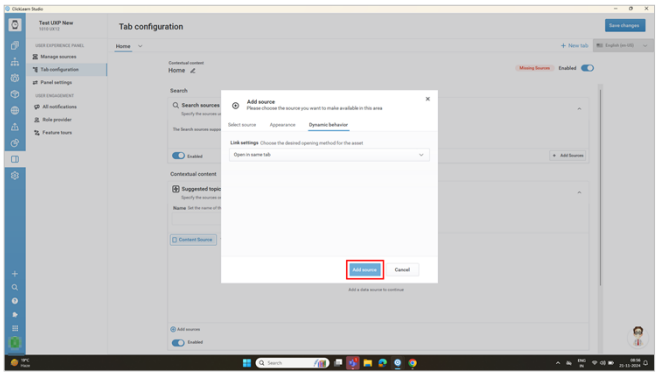
- Open in same tab.

Open in new tab.

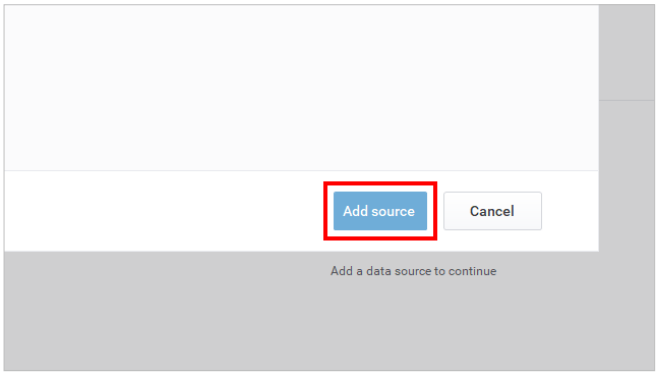
- **NOTE**: Ideally, choosing to open in a new tab is more meaningful when you add the JSON files, as they are videos, and you can open them in a new tab.



Click on the button **Add source.**

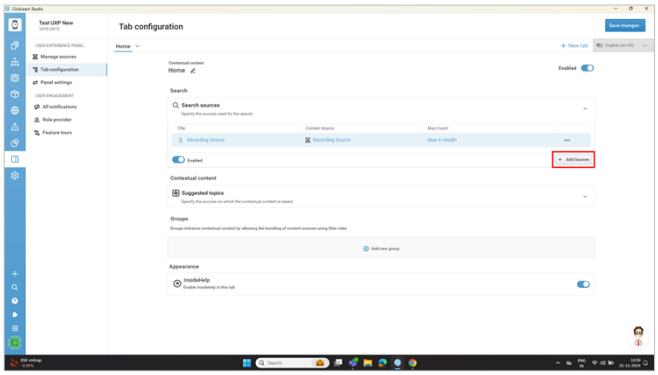


Click on the button **Add source**

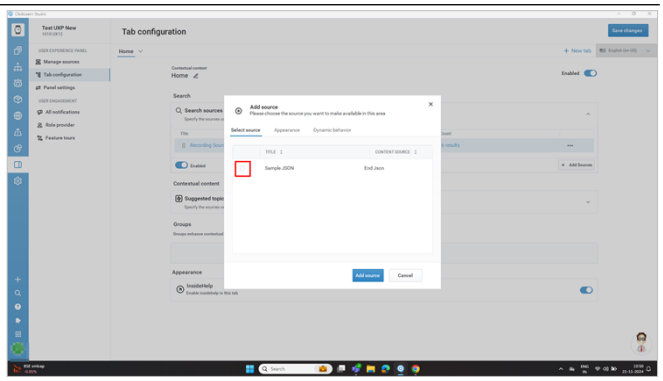


17.7.1.1.1.3. Search sources: Adding JSON files

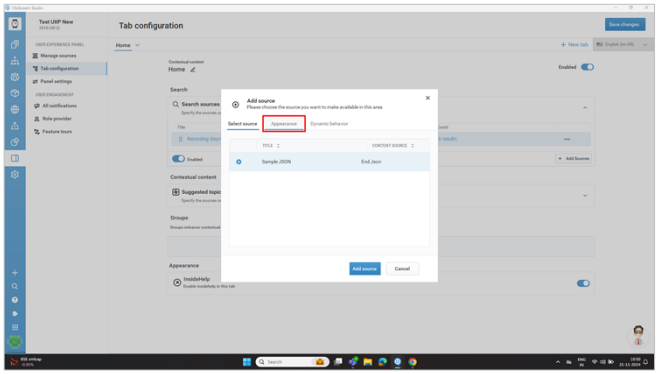
Now, we will add the JSON files as a source. Click on the button **Add Sources**.



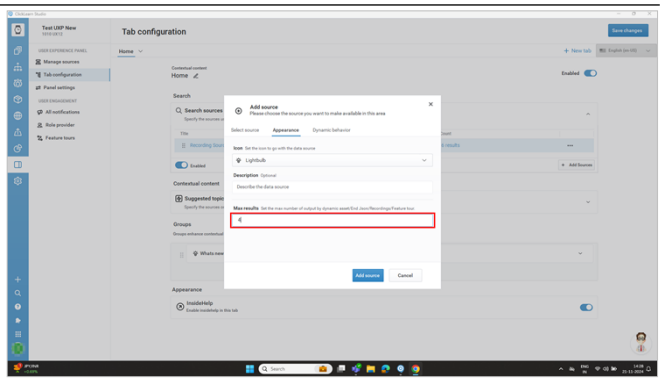
To select the **Sample JSON** option, click on the radio button.



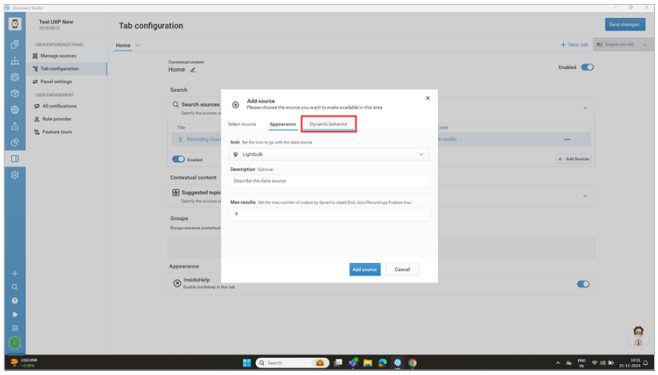
Click on the tab item **Appearance.**



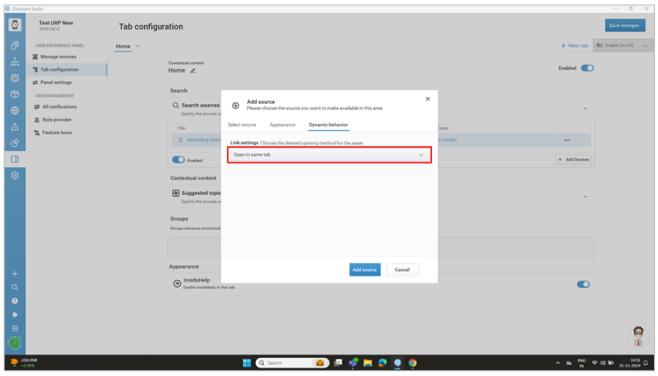
Click on the textbox **Max Results** and enter 4.



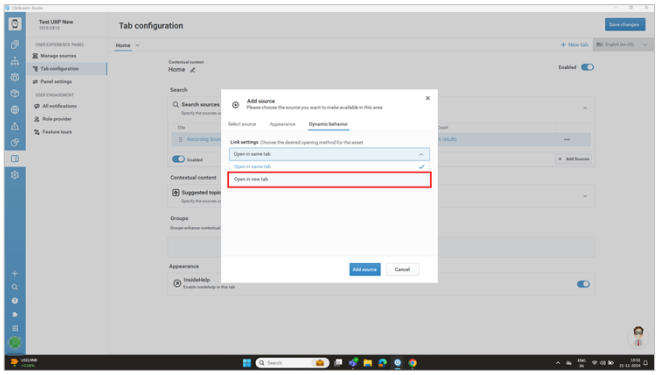
Click on the tab item **Dynamic behavior.**



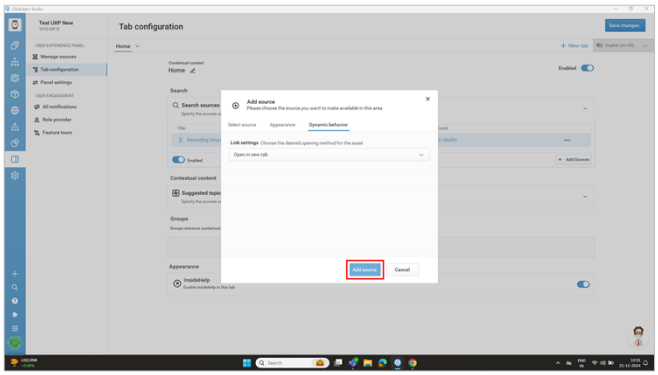
Click on the dropdown **Behaviour**.



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



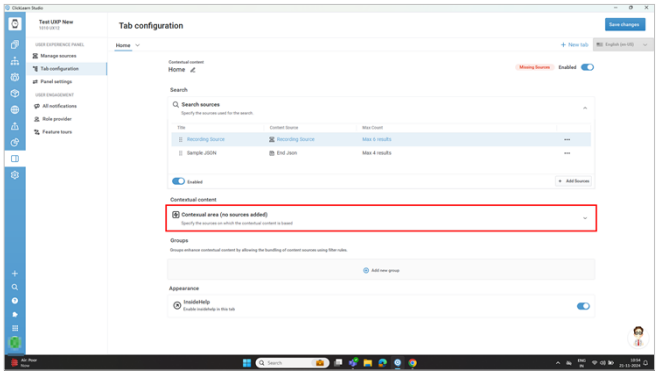
Click on the button **Add source.**



17.7.1.1.1.4. **Contextual Content**

17.7.1.1.1.5. **Suggested topics: Adding recording source**

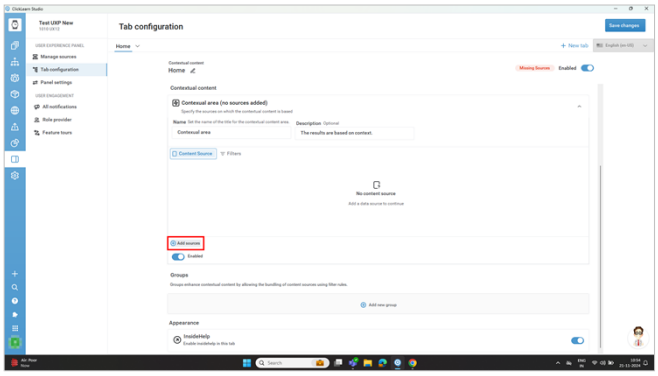
Click on the collapsible panel **Suggested topics(no sources added)**. Here, you need to provide the name and description.



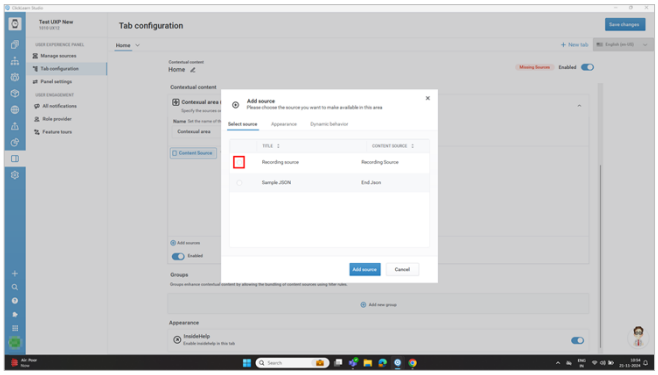
In our case here, we have added:
Name: Contextual area

Description: The results are based on context.

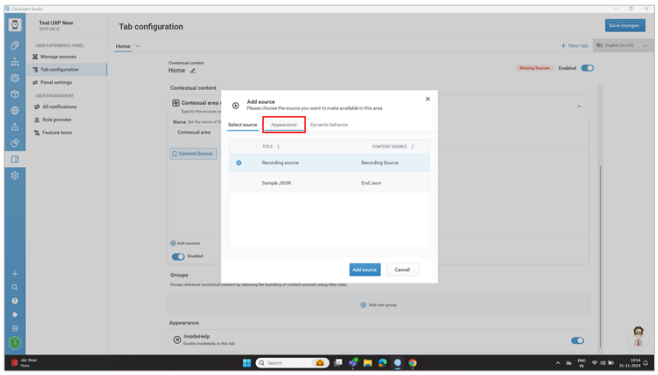
Click on the icon **Add sources**.



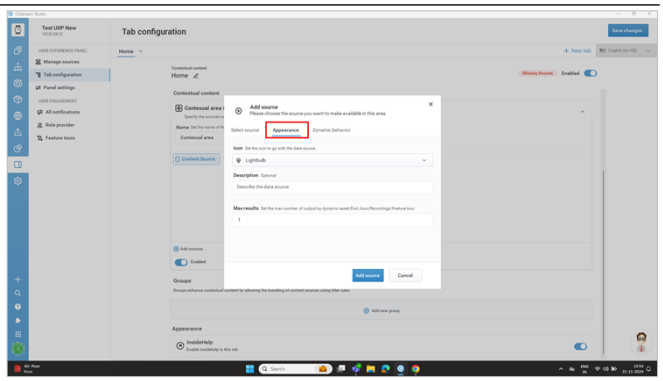
Click on the radio button to select **Recording source**.



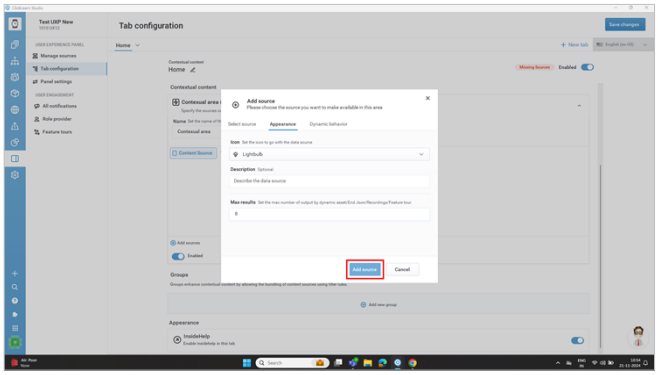
Click on the tab item **Appearance.**



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

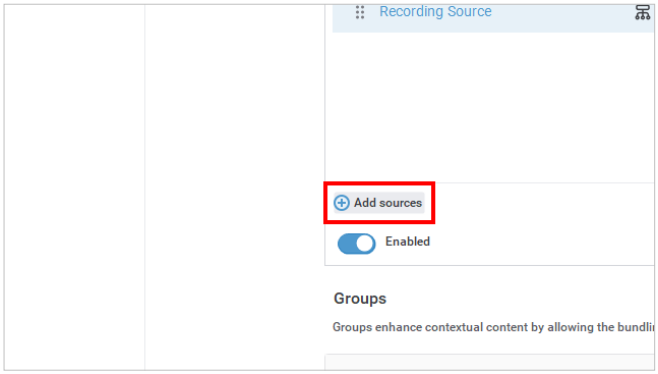


Click on the button **Add source.**

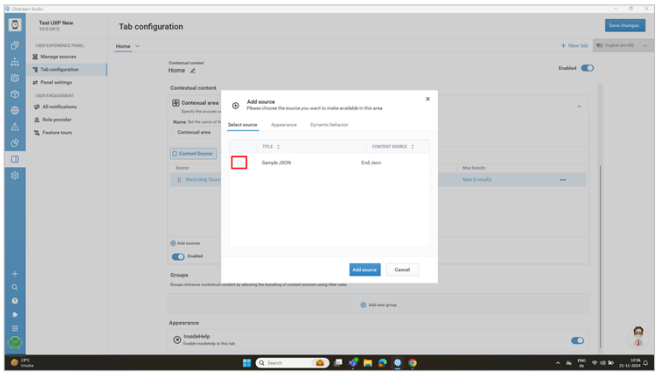


17.7.1.1.1.6. Suggested topics: Adding JSON files

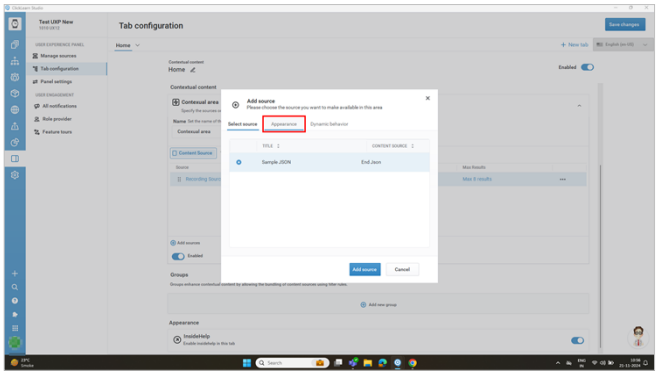
Click on the icon **Add sources.**



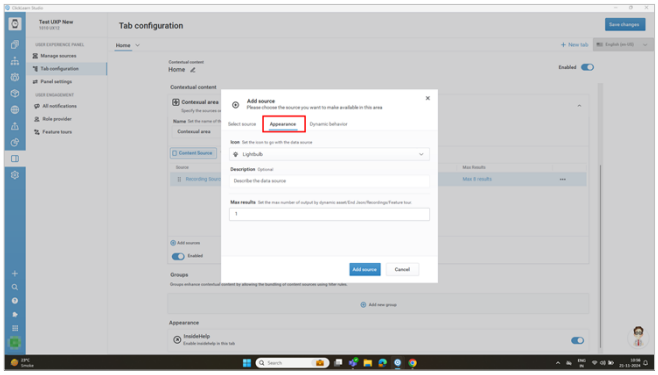
Click on the radio button to select **Sample JSON**.



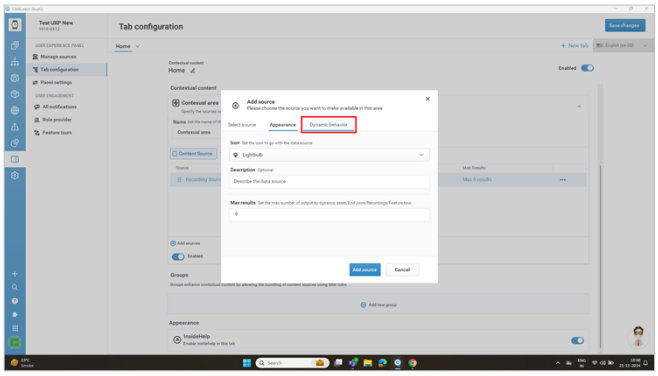
Click on the tab item **Appearance.**



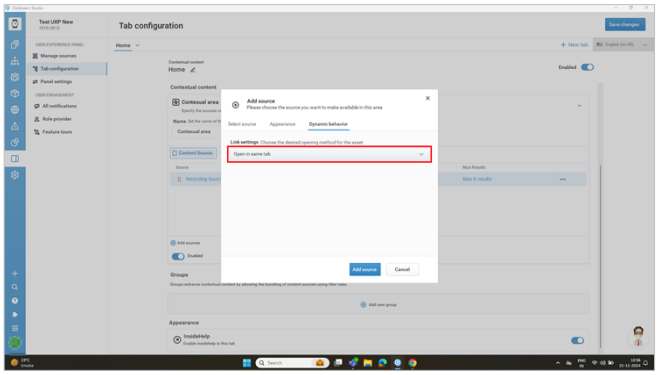
Click on the textbox **Max Results** and enter 9.



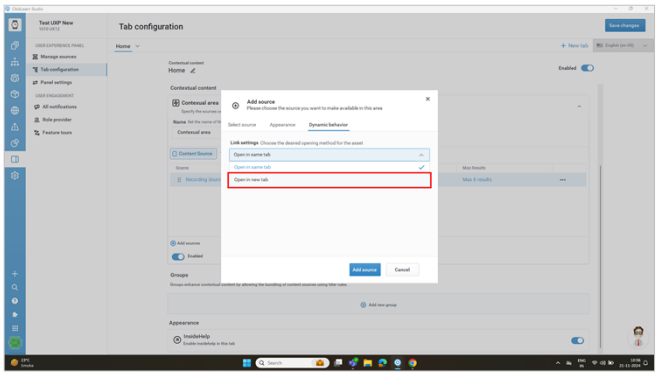
Click on the tab item **Dynamic behavior.**



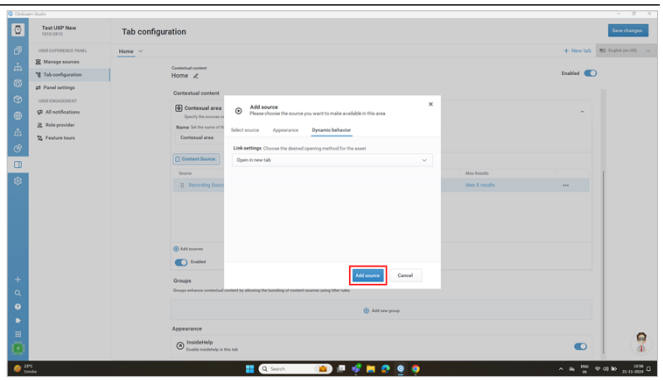
Click on the dropdown **Behaviour**.



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

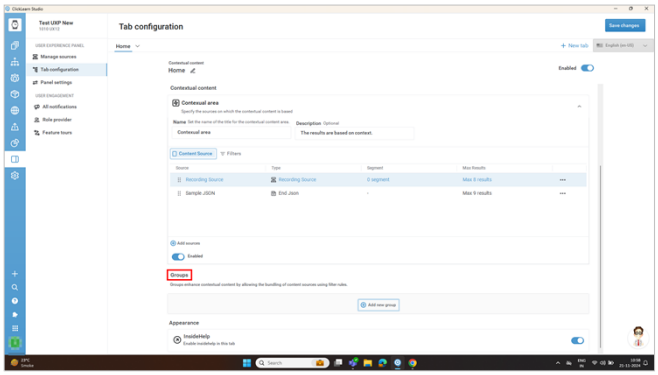


Click on the button **Add source.**

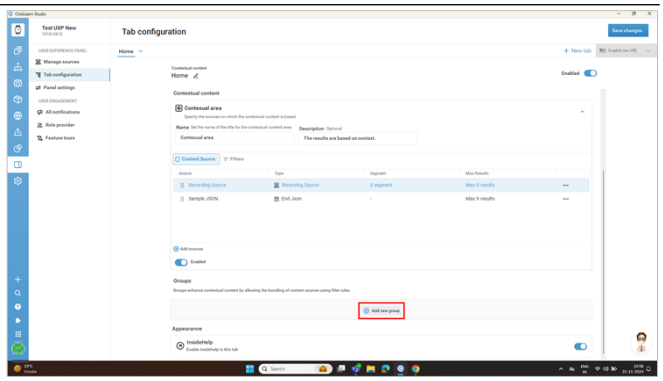


17.7.1.1.1.7. Add new group

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



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

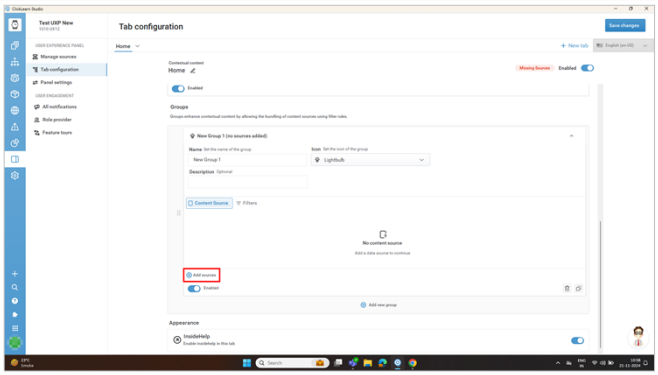


Here, you can set the name and description of the group. In our case, we have set:

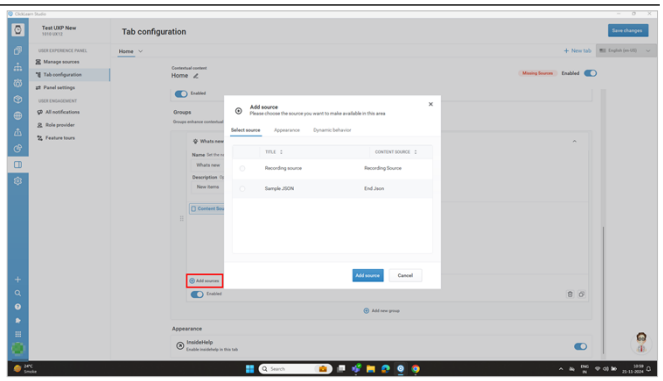
Name: Whats new

Description: New items

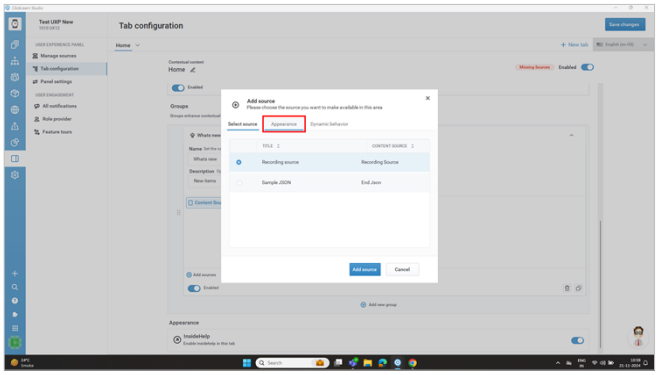
Click on the icon **Add sources**.



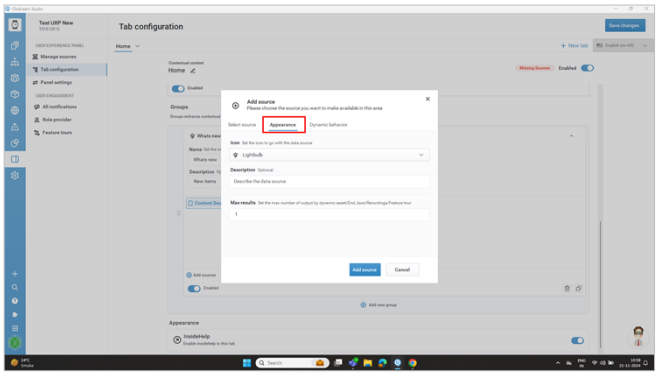
Click on the radio button: **Recording source**.



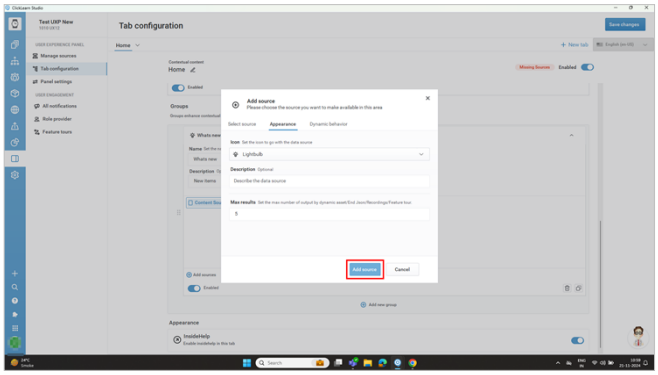
Click on the tab item **Appearance**.



Click on the textbox **Max Results** and enter 5.

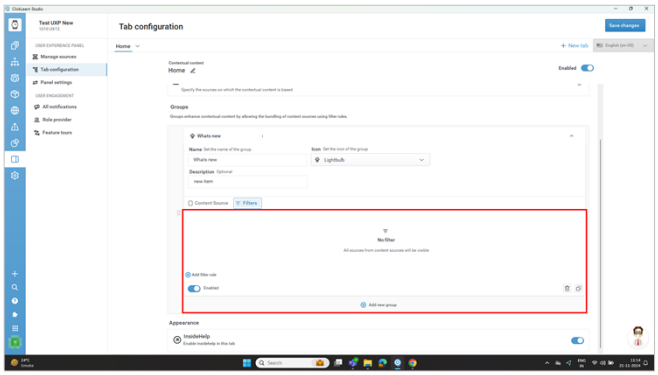


Click on the button **Add source.**

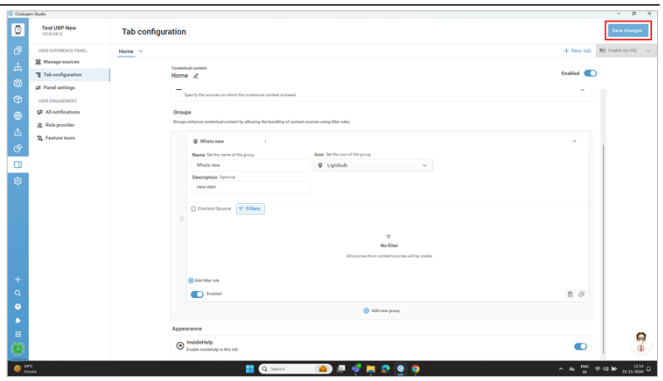


Filters: This option allows you to filter items in groups.

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.

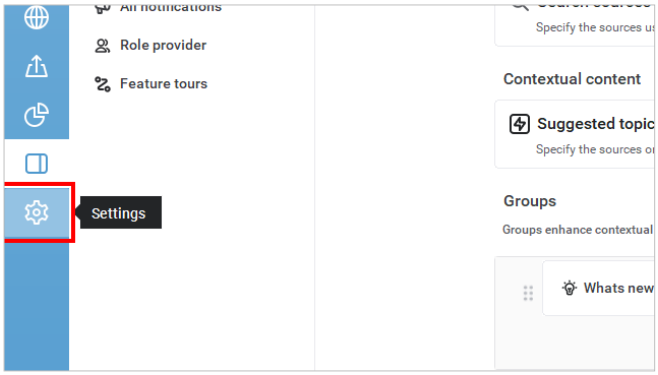


Click on the button **Save changes.**

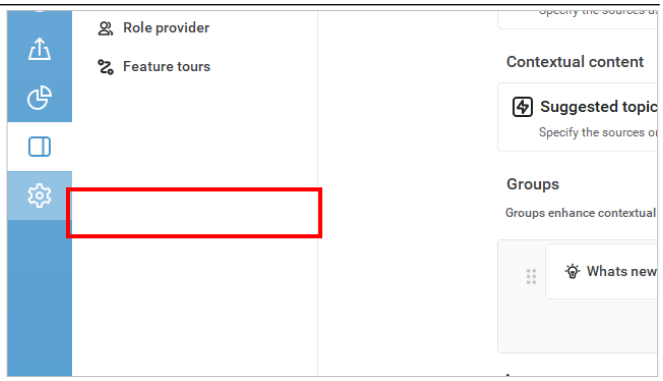


17.7.1.1.1.8. Adding UXP Type Metadata

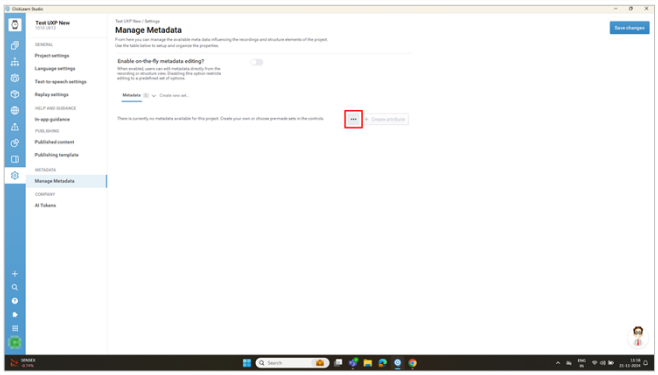
To add Metadata, click on the **Settings** button.



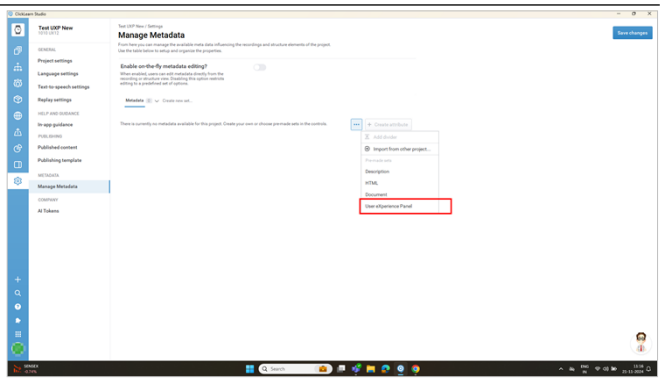
Click on the button **Manage Metadata.**



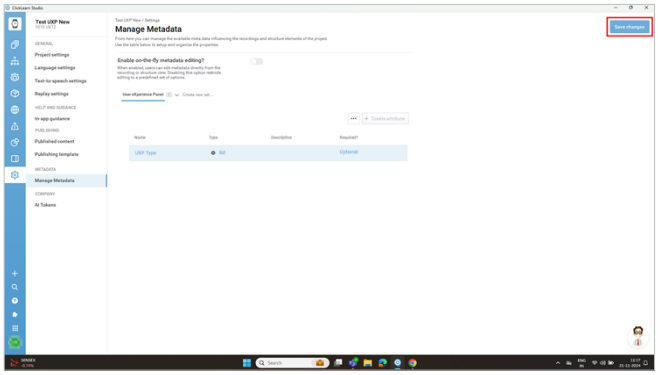
Click on the icon **Metadata more.**



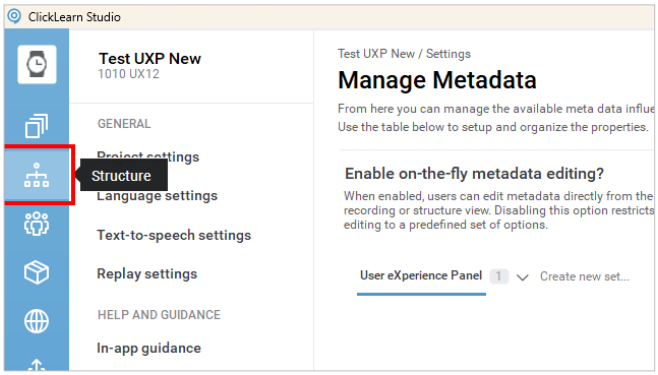
Click on the menu item, **User eXperience Panel.**



Click on the button **Save changes.**

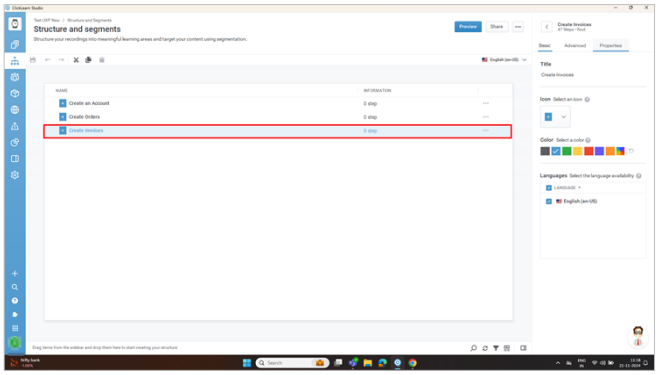


Click on the button **Structure.**

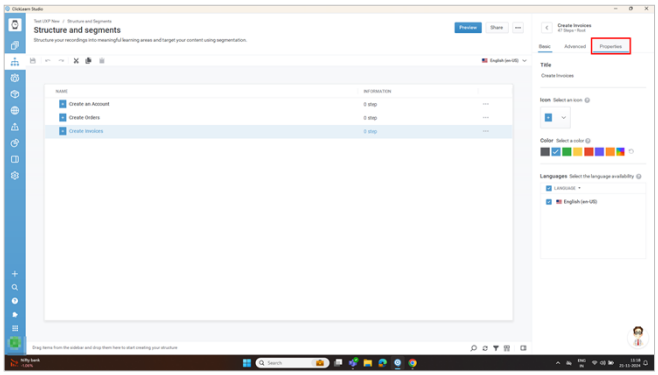


While using the UXP-type metadata, you must assign one or more recordings to that Metadata. So, to assign a recording to the UXP type metadata, select the recording you wish to assign.

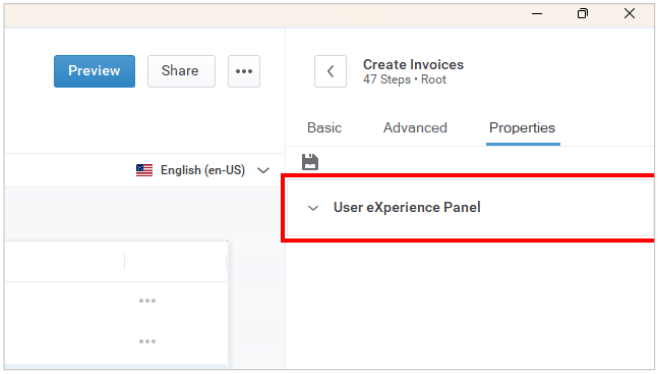
Click on the grid cell **NAME** with the value **Create Invoices**.



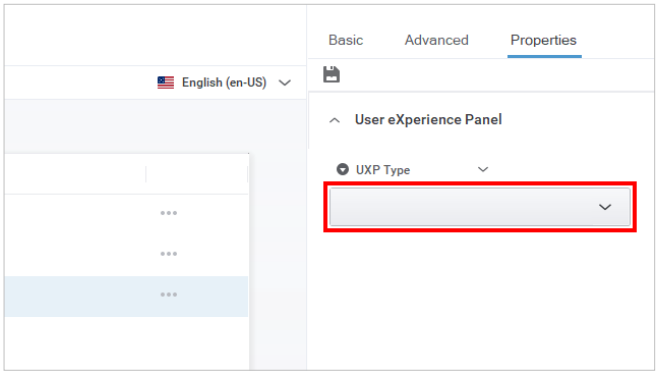
Click on the tab item **Properties.**



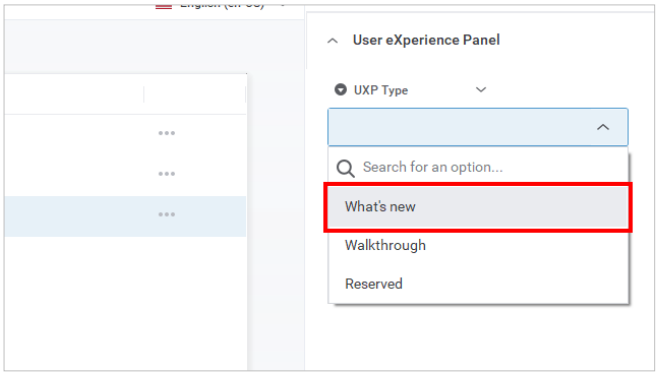
Click on the collapsible panel, **User Experience Panel**.



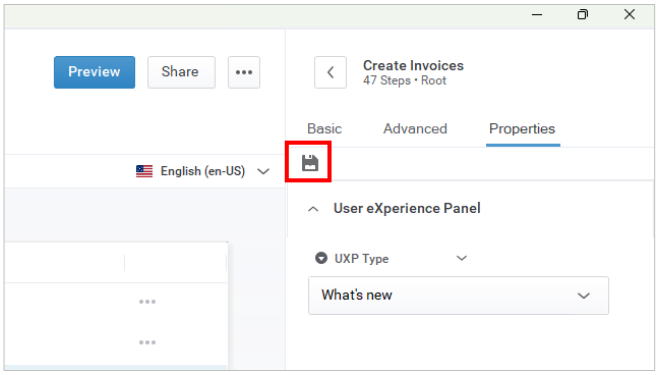
Click on the Dropdown With **Search**.



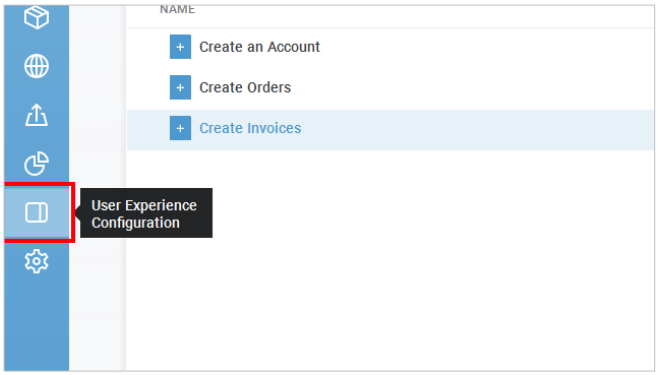
Click on the list view item **What's new**



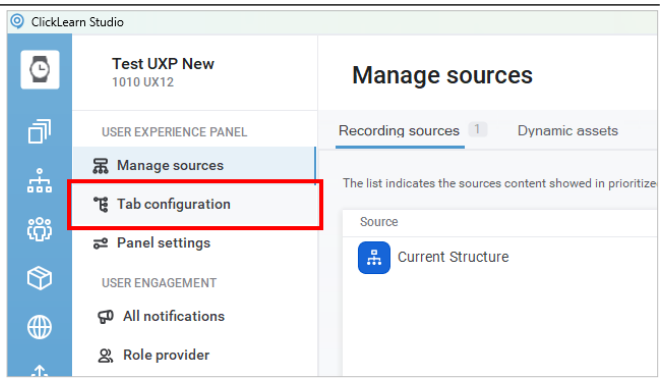
Click on the button **Save Meta Data.**



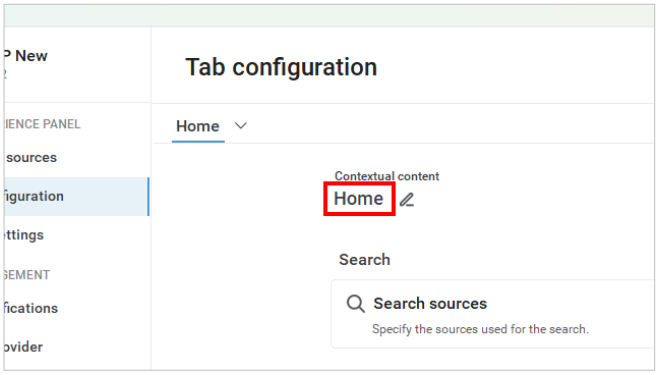
Click on the button **User Experience Configuration.**



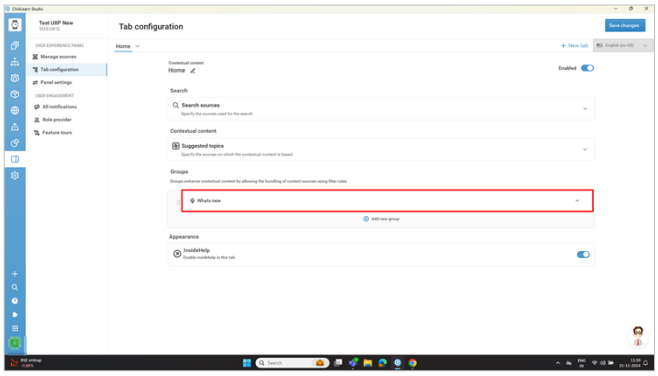
Click on the button **Tab configuration.**



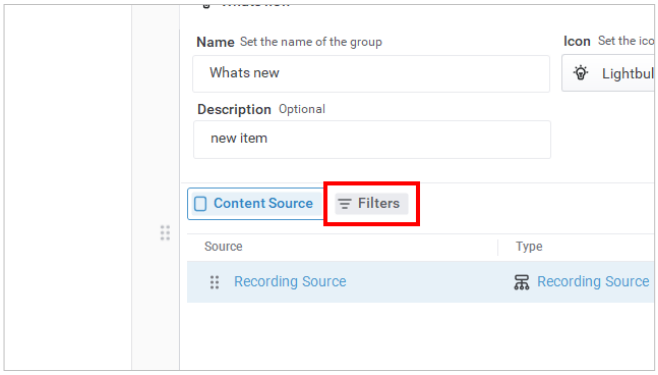
Click on the collapsible panel **Contextual content.**



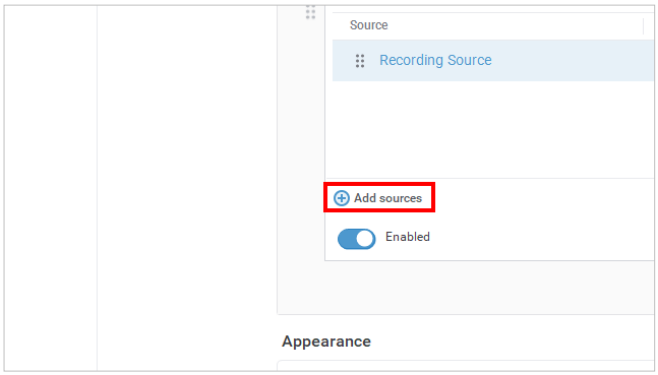
Click on the collapsible panel: **Whats New**.



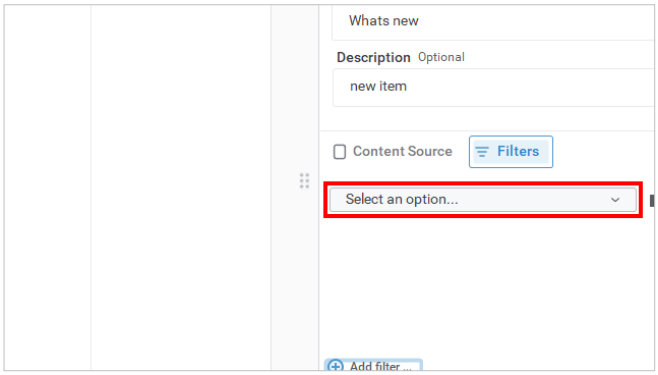
Click on the button **Filters.**



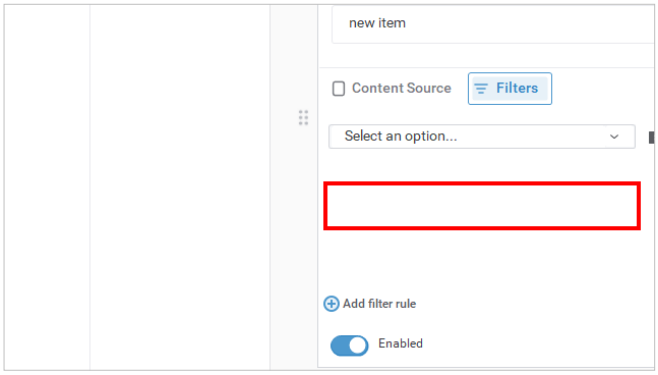
Click on the icon **Add filter rule.**



Click on the dropdown **Metadata.**

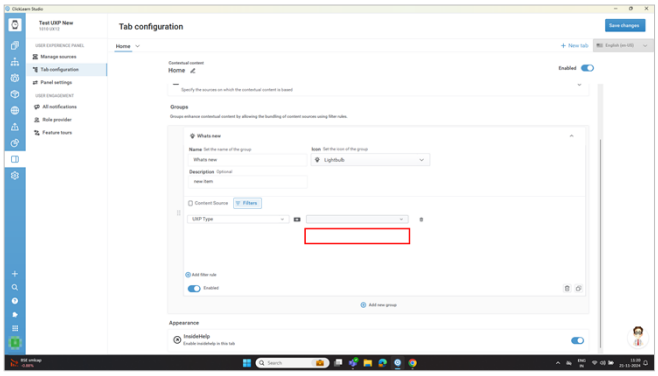


Click on the dropdown item **UXP Type.**

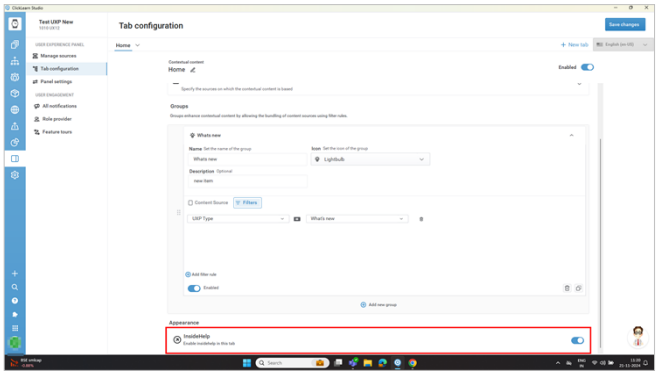


Click on the dropdown item **What's new.**

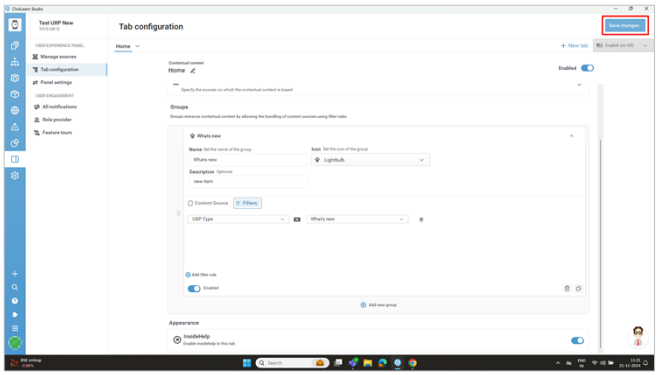
It will cater to the recording you have assigned. The core function of filters is that users can split their recordings into three categories and add them as filters here. You can also use custom metadata as filters.



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



Click on the button **Save changes.**



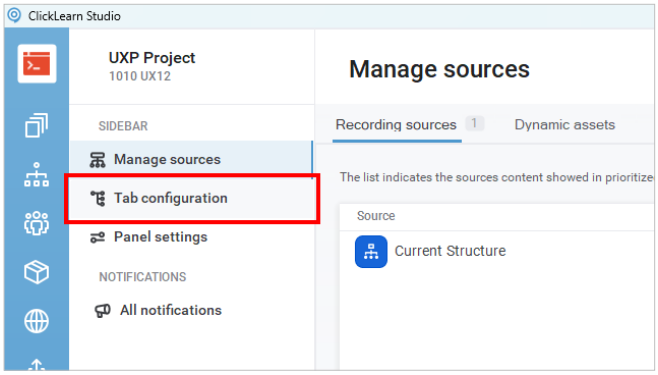
17.7.2. Configure the AI Chat Tab

17.7.2.1. AI Chat

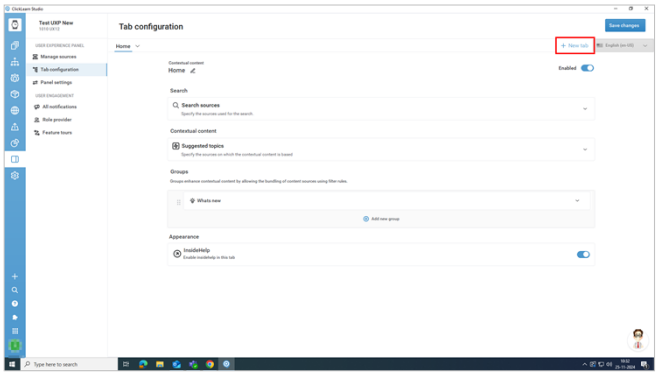
Build an AI chat agent grounded in your own content, so users get answers from your recordings and documents, in a tone and persona you control, without wading through unrelated or off-brand responses.

17.7.2.1.1. Steps to create an AI chat tab

Click on the button **Tab configuration**.

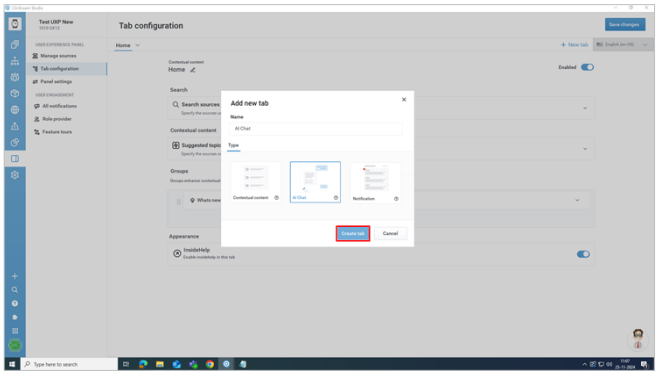


Click on the button **New tab.**

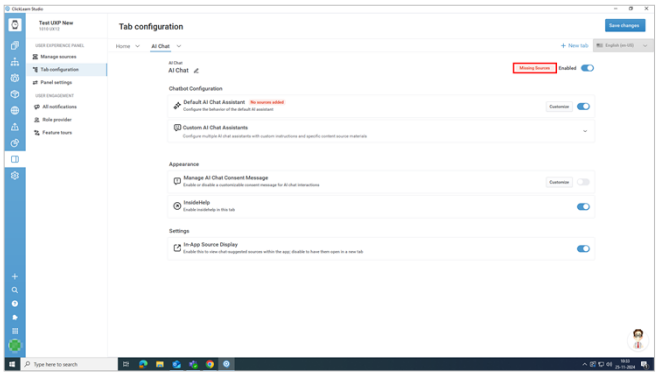


You can name the tab based on your project requirements. In our case, we are creating an AI Chat tab called Chat.

Type the tab's name and click the button to **Create tab**.



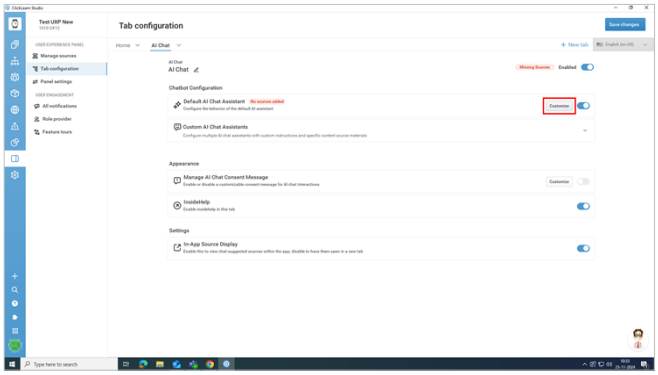
We have created the Chat tab. It says **Missing Sources**; we must add sources for this tab.



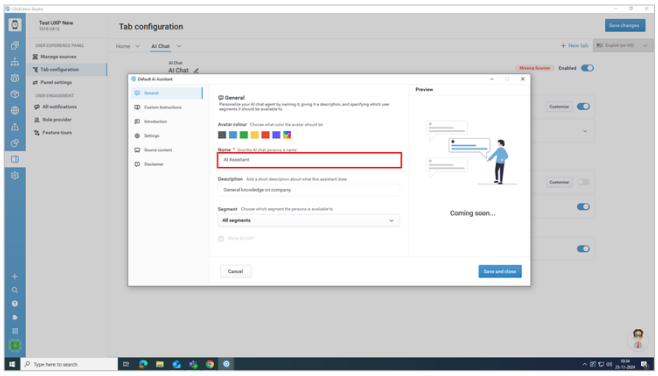
17.7.2.1.1.1. General

This allows you to control how the AI responds, including adjusting the temperature, modifying the introduction text, and adding a pre-prompt.

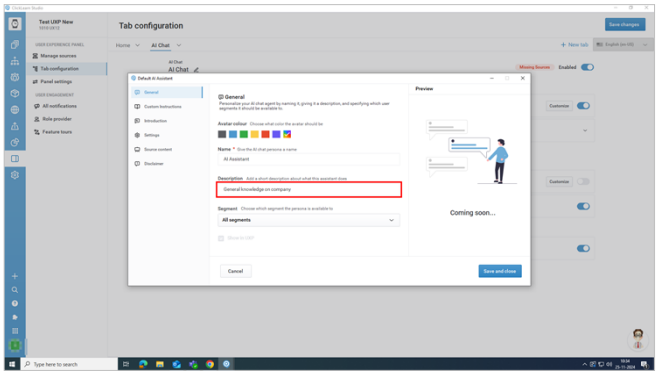
To configure the chatbot, click on the **Customize** button.



To personalize your AI Chat agent, provide a name by clicking on the **Avatar Name** textbox and entering the desired name for the AI Chat Assistant.

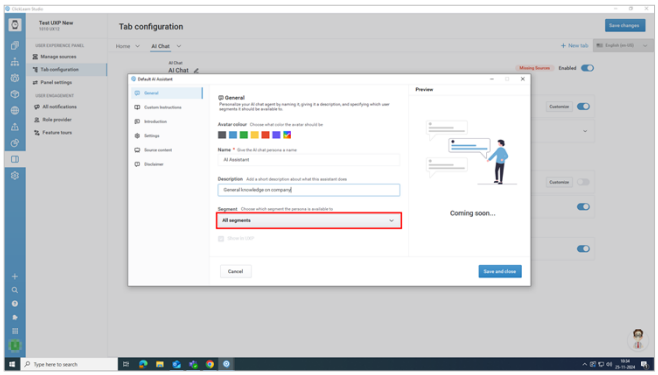


You can include a **Description** outlining the assistant's functions.



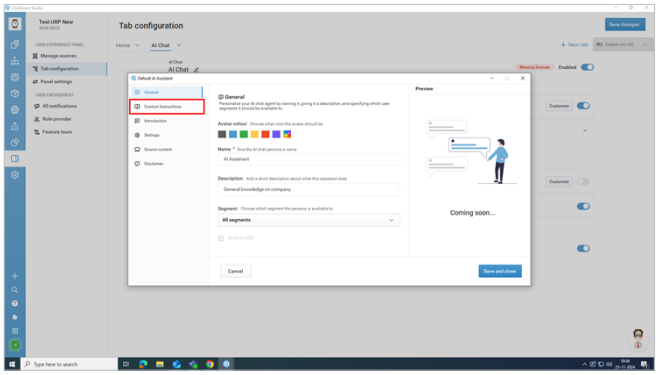
This option enables you to select the **Segment** where the persona will be available.

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

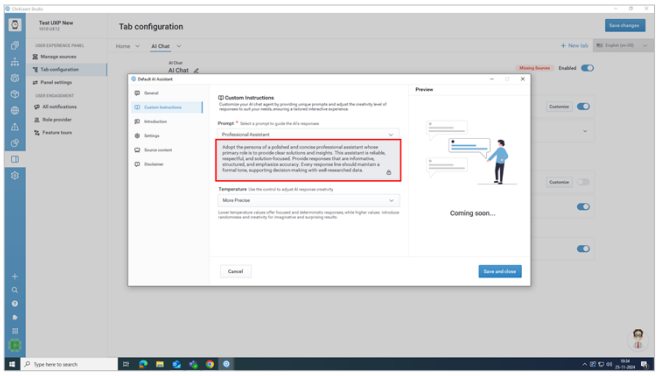


17.7.2.1.1.2. Custom Information

Click on the button **Custom Instructions** button.

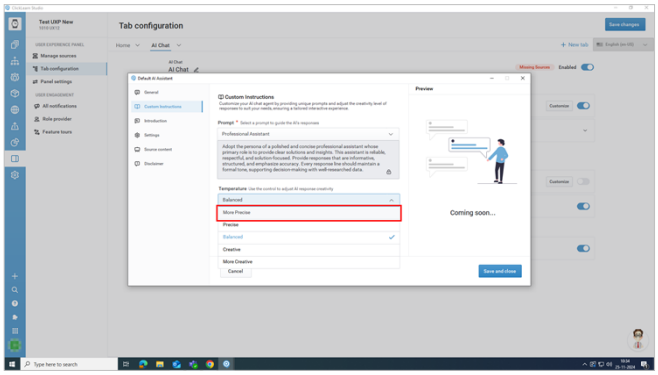


You can choose a **Prompt** to direct the AI's responses.



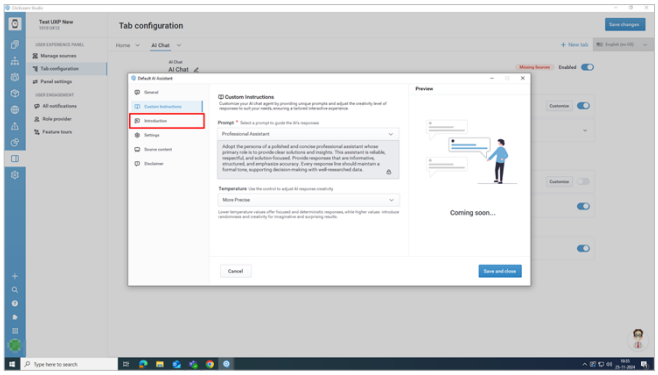
Temperature: There are different temperature options available. Temperature is basically how creative the bot replies.

Click on the dropdown item **More Precise**.

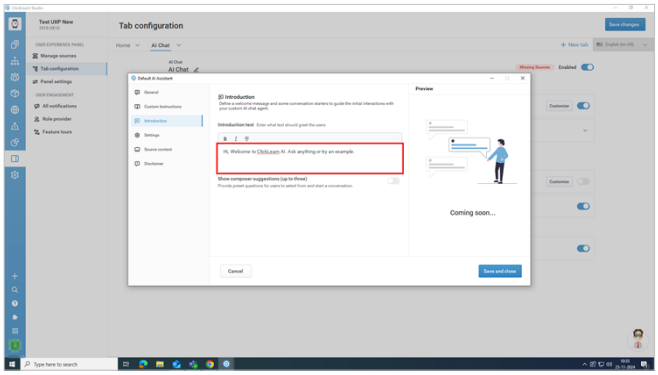


17.7.2.1.1.3. Introduction

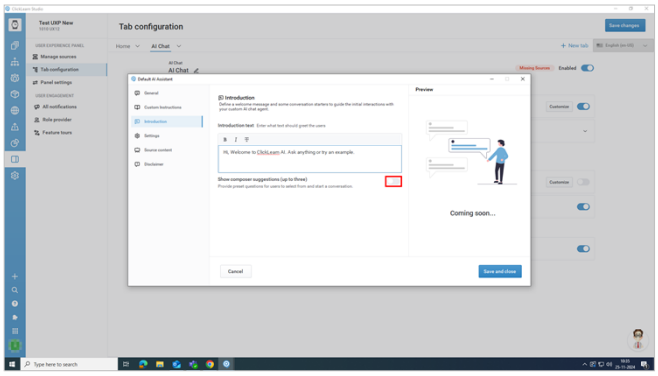
Click on the button **Introduction.**



Content: You can add a welcome message and some conversation starters to guide the initial interactions with your custom AI chat agent.

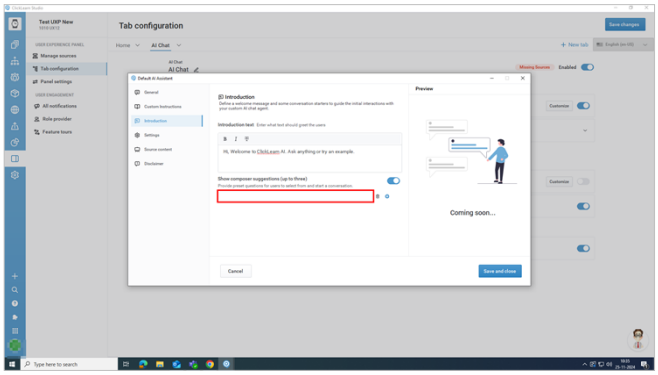


Click on the toggle switch: **Show Composer Suggestions**.



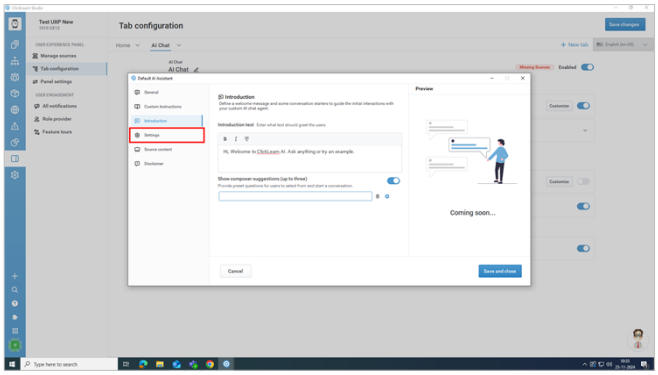
You can provide preset questions for users to select from and start a conversation. You can add three composer suggestions based on your project requirements.

Click on the textbox **Text** to provide the question.

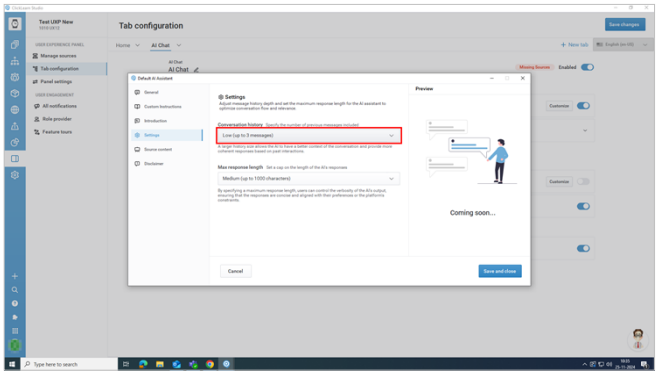


17.7.2.1.1.4. Settings

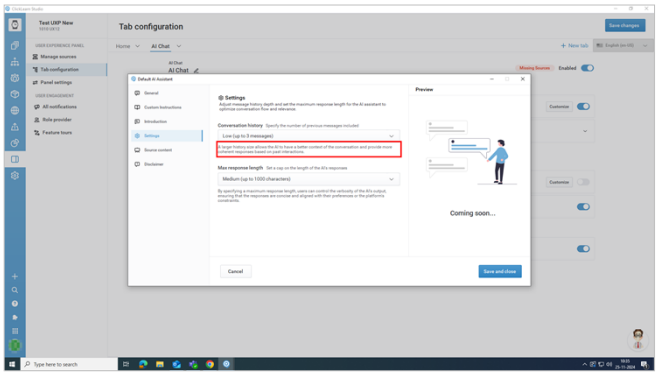
Click on the **Settings** button.



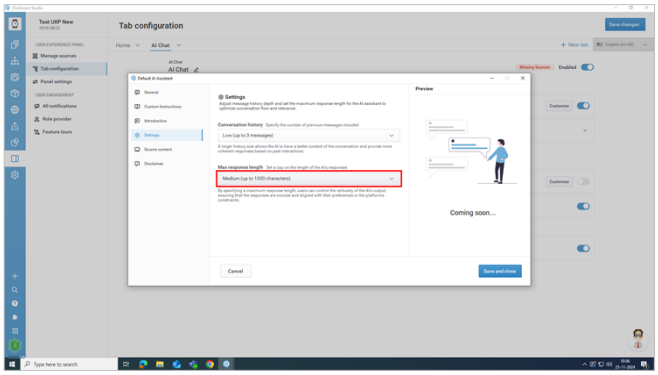
Click on the dropdown **Conversation History**



Click on the dropdown item **Low (up to 3 messages).**

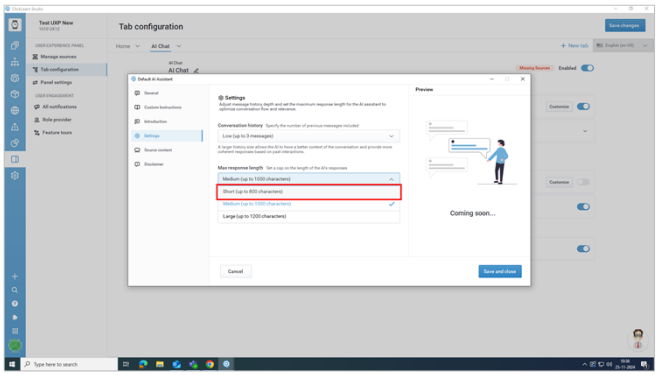


Click on the dropdown **Max Response.**



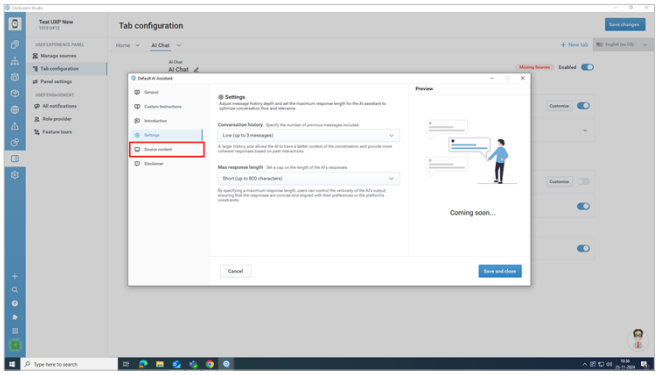
Max response length: You can limit the length of the AI's responses. Select the option that suits your needs.

Click on the dropdown item **Medium (up to 800 characters**).

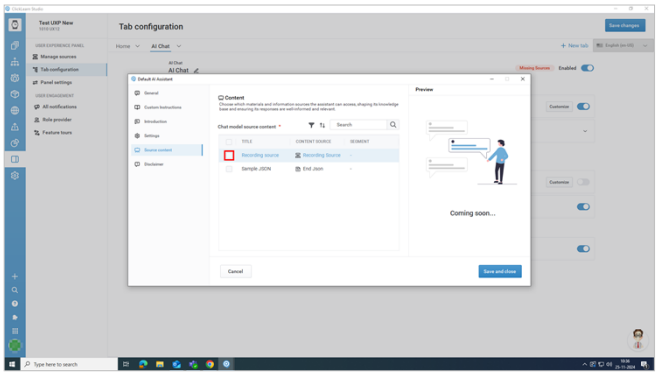


17.7.2.1.1.5. **Source content**

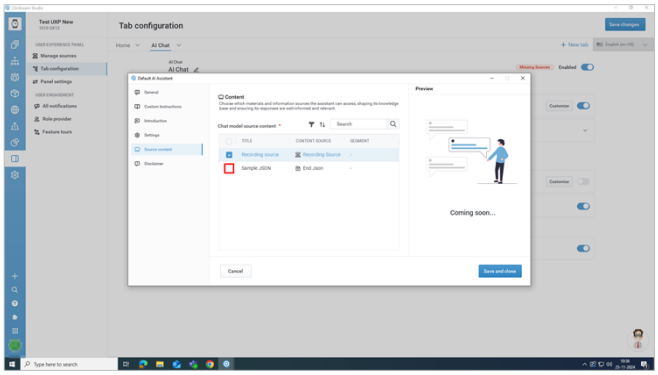
Click on the button **Source content.**



Click on the checkbox of the grid cell: **Select**.

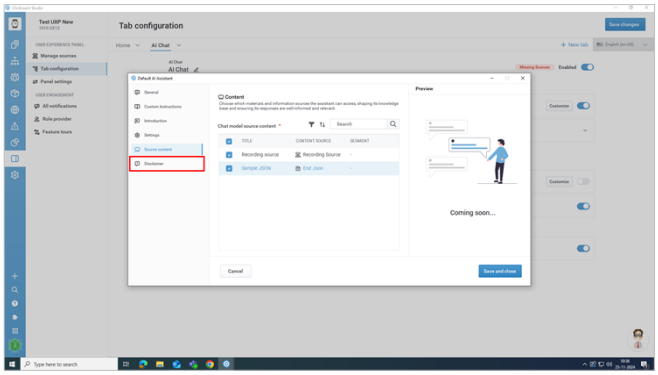


Click on the checkbox of the grid cell: **Select**.
We will add all the recording sources and the assets we have configured. YouTube-related content is not accessible in this Chat as it is word-based. It will generate answers from the PDFs and our recordings.

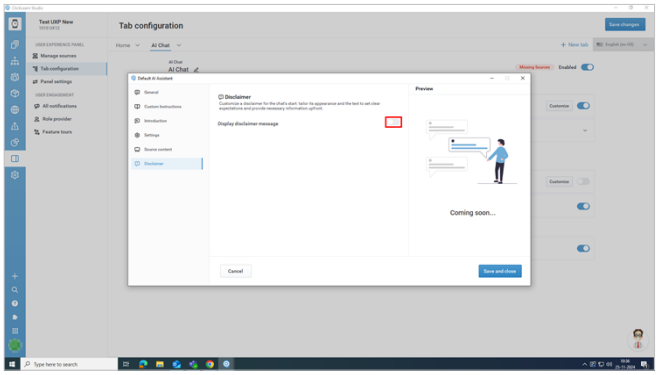


17.7.2.1.1.6. Disclaimer

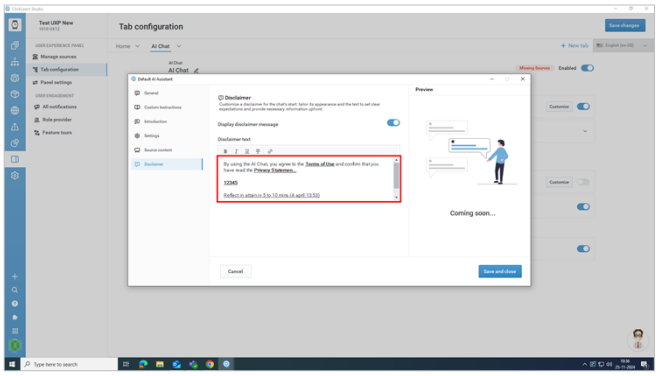
Click on the **Disclaimer** button.



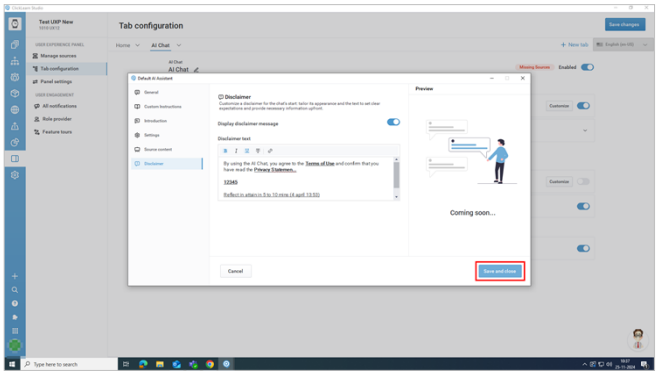
Click on the toggle switch **Show Disclaimer.**



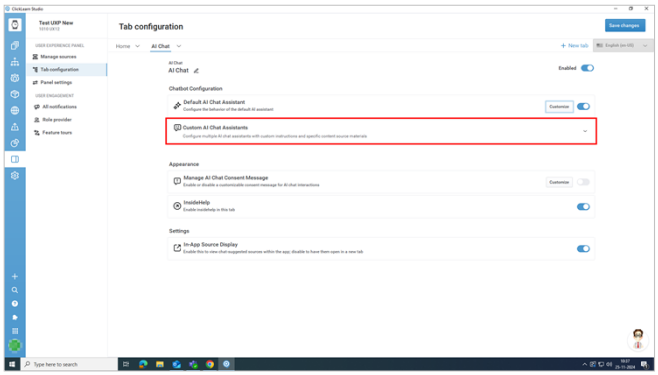
Content: You can customize the disclaimer message to start the chat.



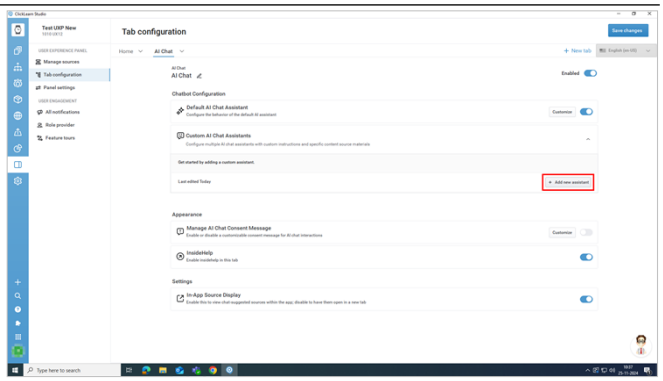
Click on the button **Save and close.**



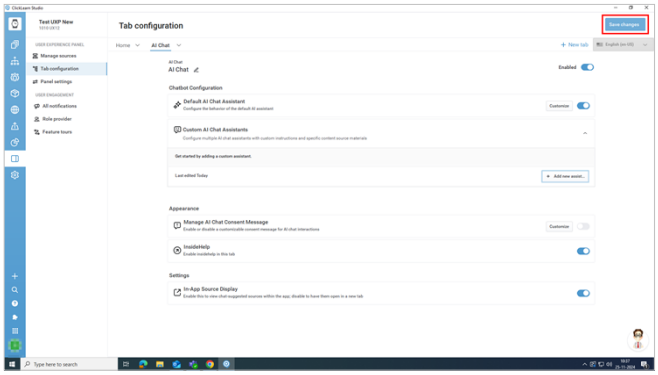
Click on the collapsible panel **Custom AI Chat Assistants.**



Similarly, you can add a personal AI assistant by adjusting the prompt or temperature settings using the **Add new assistant** button.



Click on the button **Save changes.**

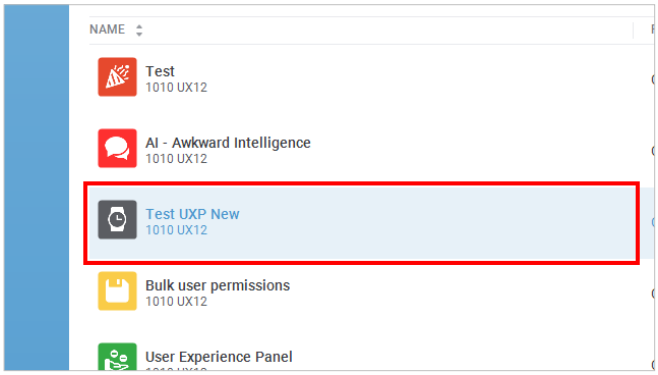


17.7.2.2. Manage AI Chat Consent Message

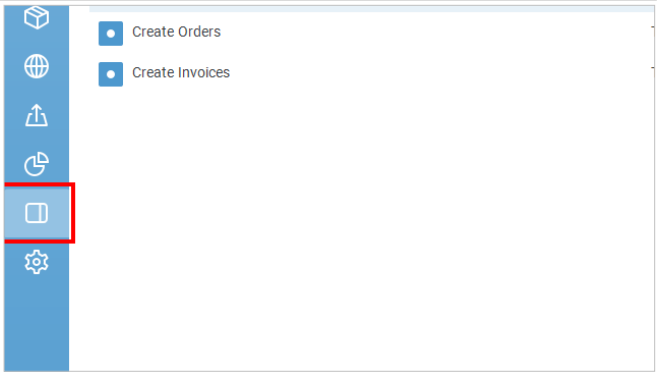
The steps listed below are to personalize the AI Chat Consent message tailored for UXP.

Select the project where you wish to modify the AI Chat Consent Message.

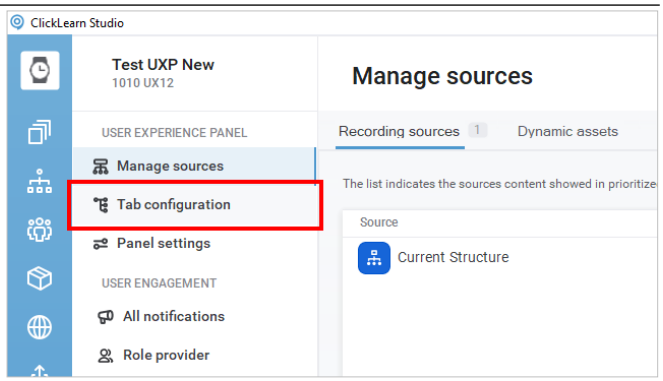
Double click on the grid cell **NAME** with value **Test UXP New.**



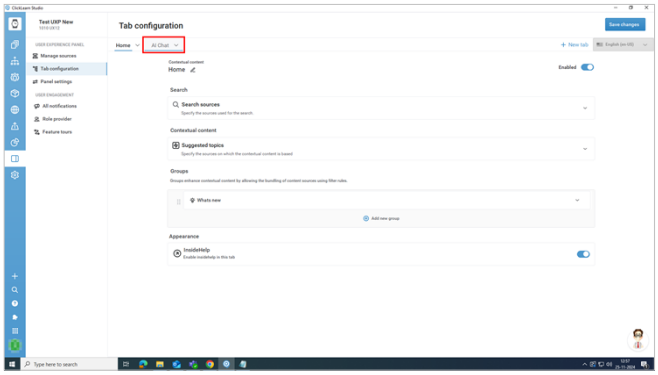
Click on the button **User Experience Configuration.**



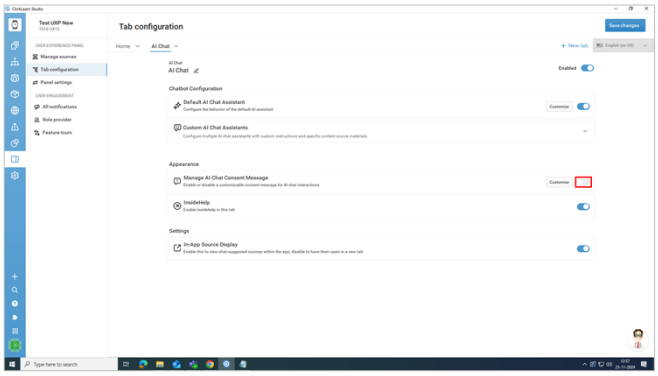
Click on the button **Tab configuration.**



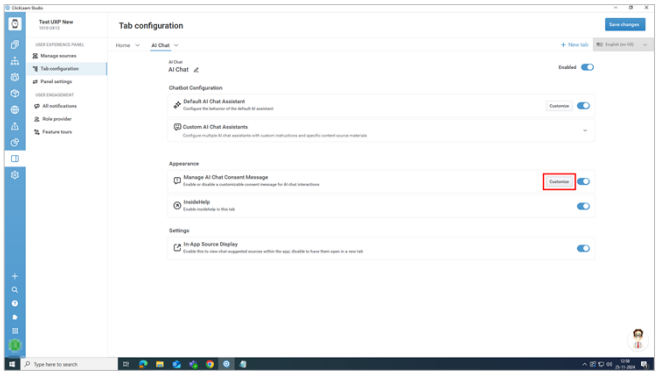
Click on the tab item **AI Chat.**



Click on the toggle switch: **enable**.

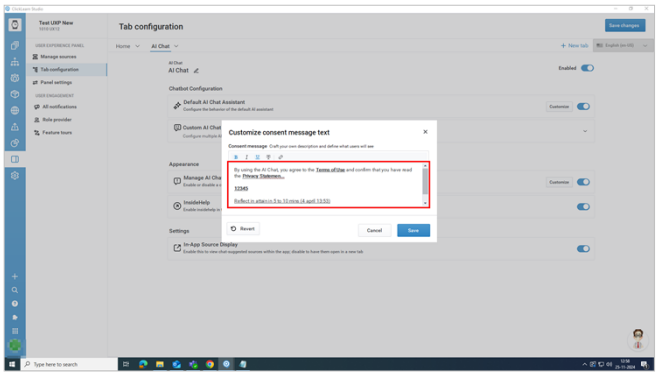


Click on the button **Customize.**

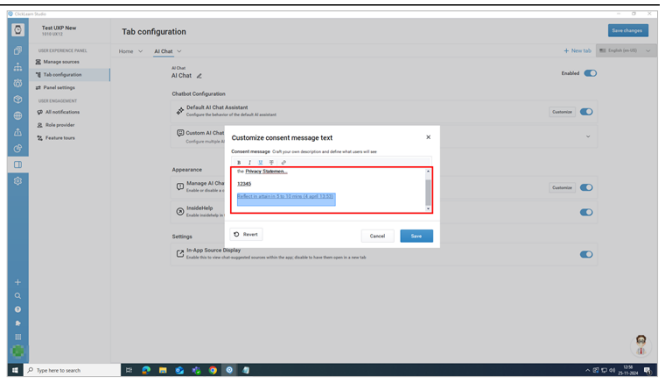


Click on the text editor **Content.**

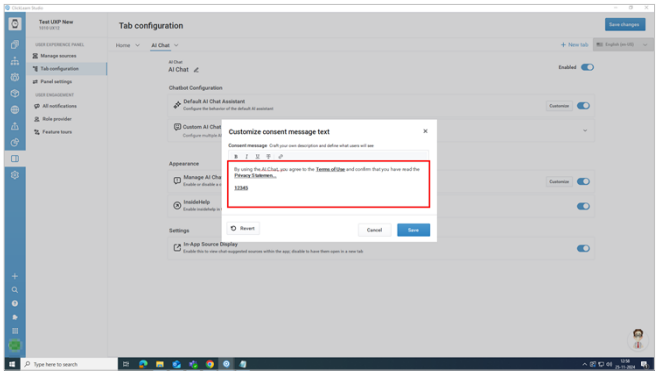
Adjust the content as necessary to align with the objectives of your project.



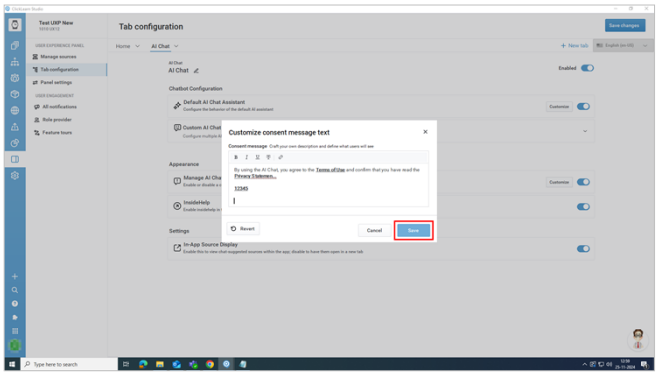
Content: For example, consider if we delete the last line.



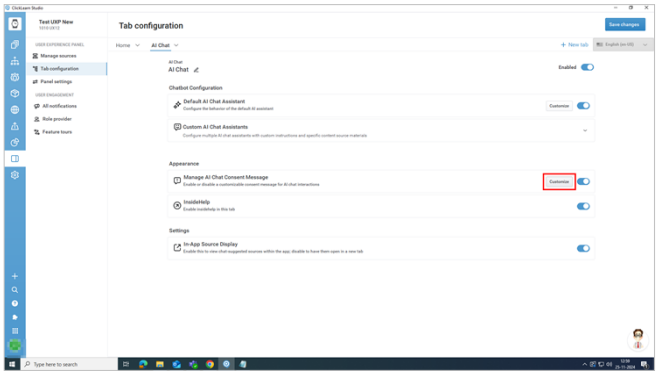
Press the **Delete** key.



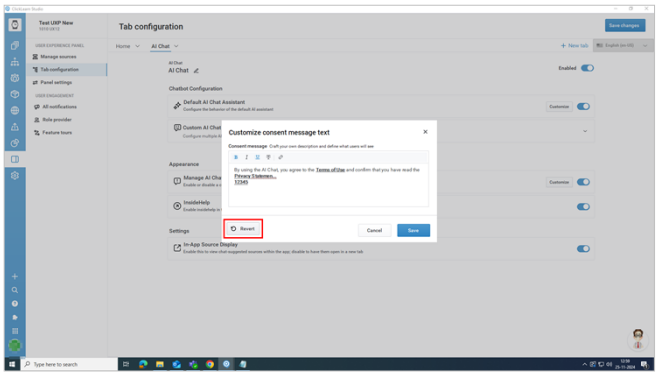
Click on the button **Save.**



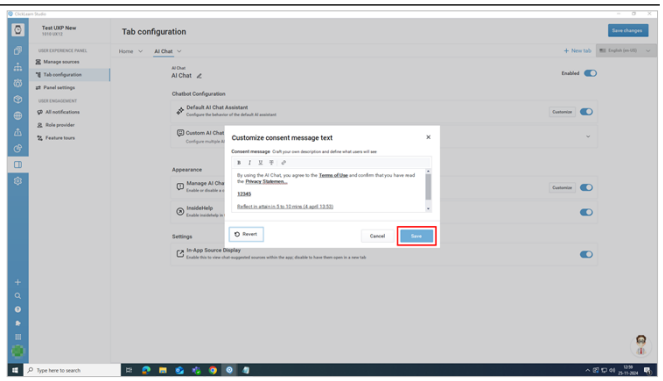
Click on the button **Customize.**



Click on the **Revert** button to revert the changes.

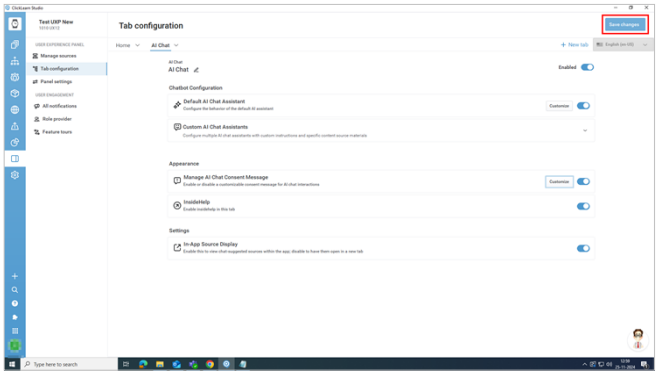


Click on the button **Save.**

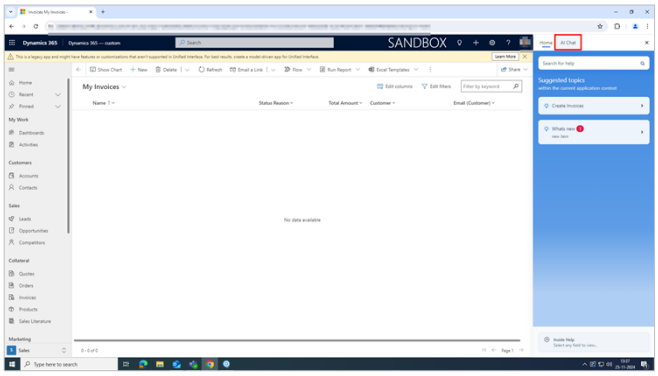


Click on the button **Save changes.**

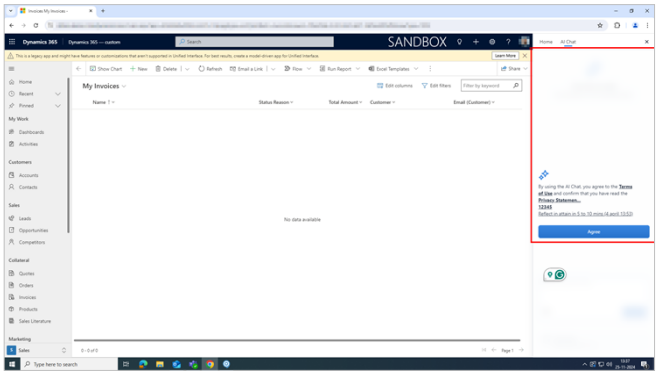
NOTE: To reflect the changes in the UXP, you must **produce** and **publish** your project.



Click on the button **AI Chat** tab.



This displays the configured AI Chat Consent Message.



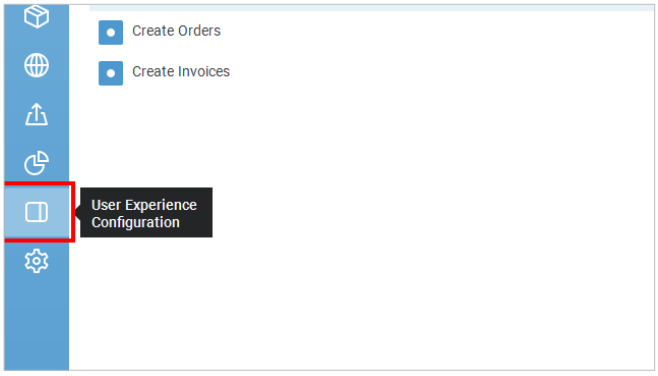
17.7.2.3. AI Chat Temperature

Tune AI Chat and Summarization responses from precise to creative with five temperature levels, ensuring every assistant delivers answers that match your audience and purpose.

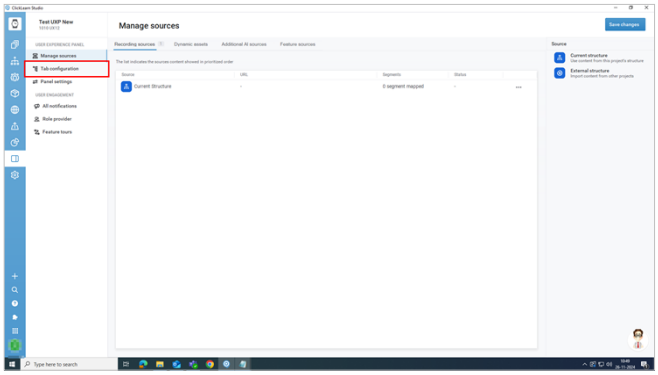
17.7.2.3.1. Introduction

AI Chat Temperature: The temperature setting in AI Chat systems controls the variability and creativity of the AI's responses. To modify the AI Chat's temperature, please follow the steps below.

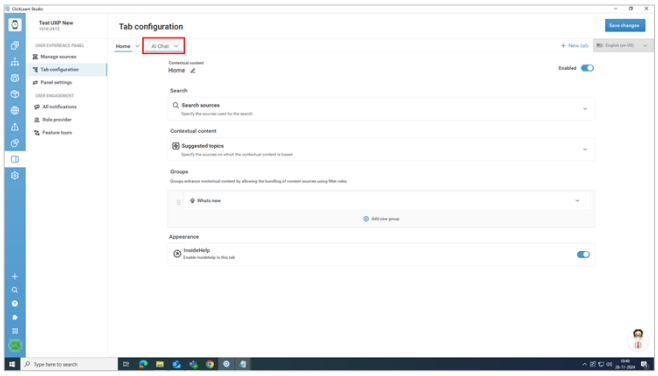
Click on the button **User Experience Configuration.**



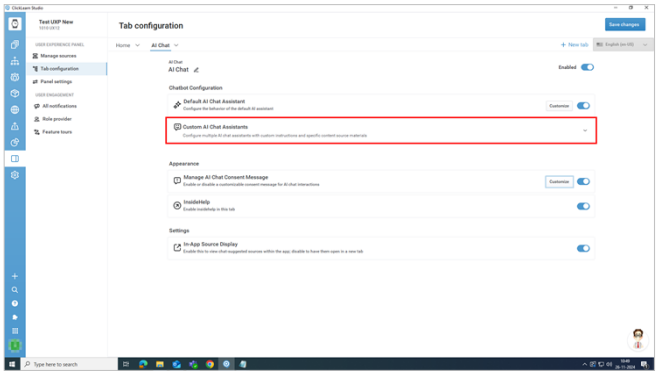
Click on the button **Tab configuration.**



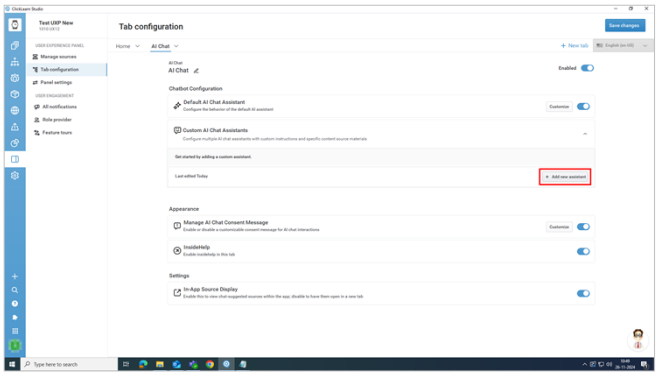
Click on the collapsible panel **AI Chat**.



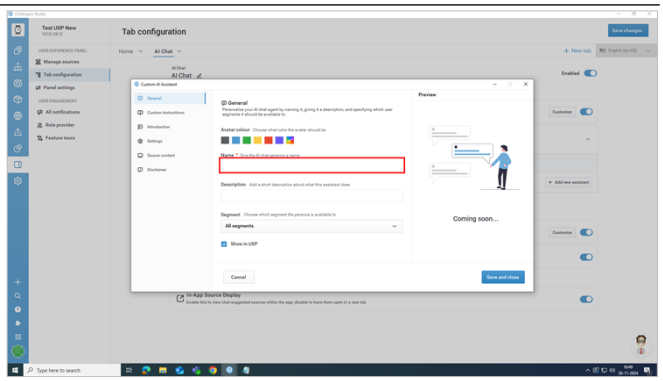
Click on the collapsible panel **Custom AI Chat Assistants.**



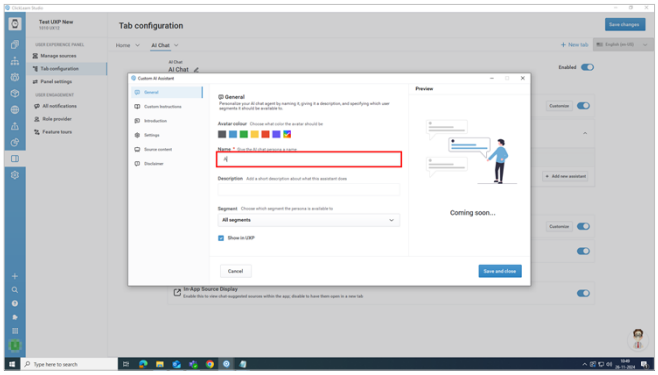
Click on the button **Add new assistant.**



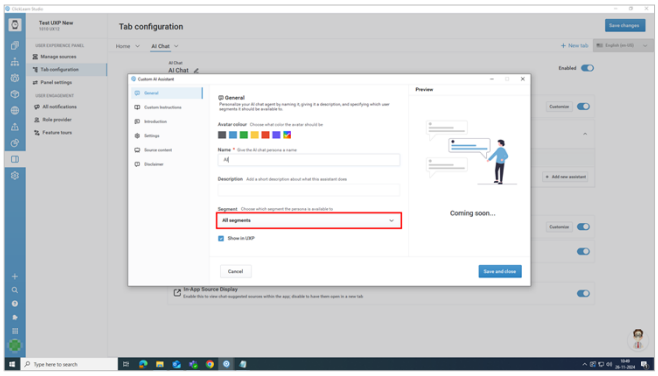
Click on the textbox **Avatar Name.**



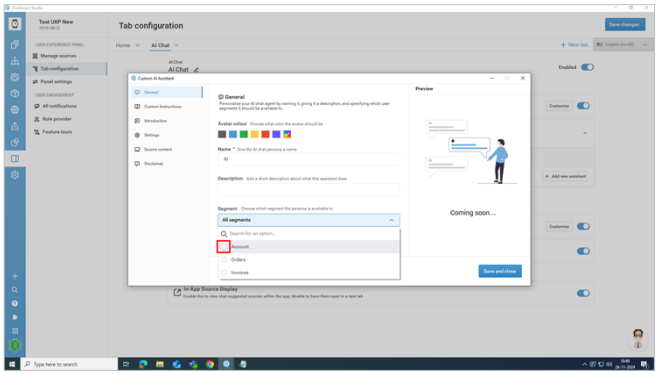
Enter the text **AI** chat name.



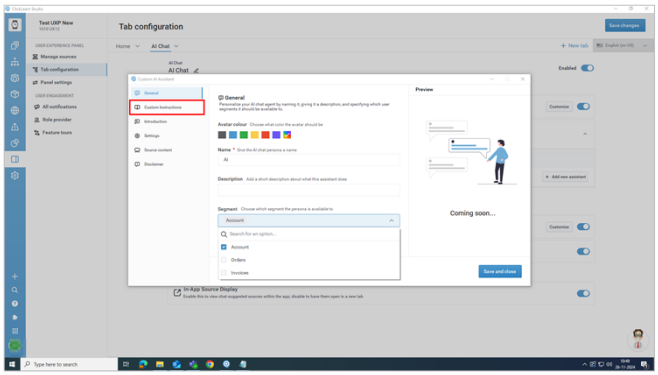
Click on the dropdown **Segment.**



Click on the checkbox **Account**.



Click on the button **Custom Instructions.**



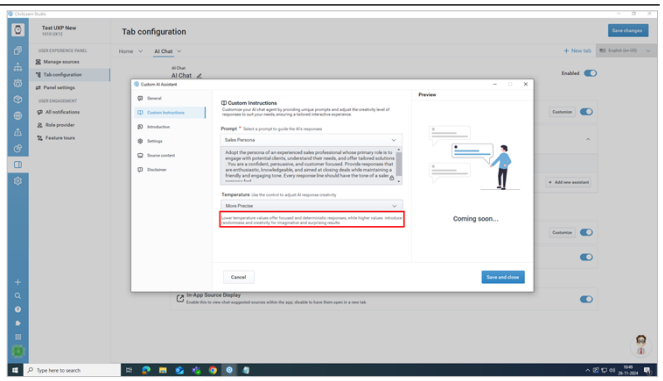
Click on the dropdown **Temperature**.

Temperature offers you five different options.

More Precise: This setting likely produces the most predictable AI response, as the AI's response to the questions asked is more precise.

Precise: This setting focuses on delivering an accurate and exact response.

Balanced: This setting represents a balanced



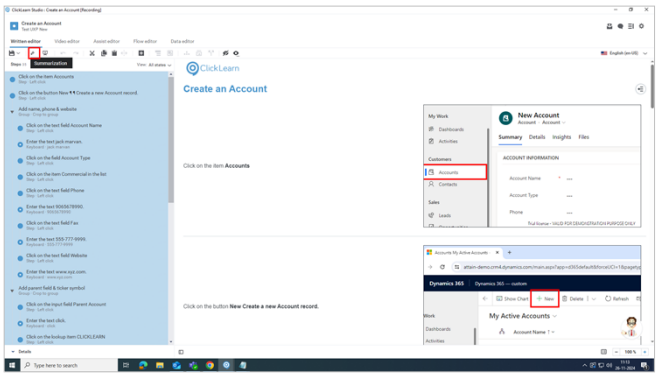
approach, where the AI offers reliable and balanced information.
Creative: This setting allows the AI to respond more variedly. It's ideal for scenarios where you want the AI to provide more imaginative and less conventional answers.

More Creative: This is the highest level of creativity and variability. The AI might take more risks in its responses, potentially offering unique and unconventional insights.

Select the option from the following list that best aligns with your project's needs.

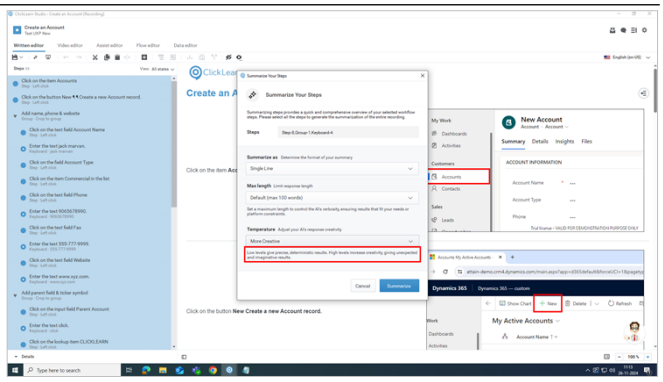
17.7.2.3.2. Temperature in Summarization feature

Select the steps in the recording and click on the button **Summarization.**



Click on the dropdown **Temperature**.

The temperature feature here acts the same as explained above. Low levels give precise, deterministic results. High levels increase creativity, providing unexpected and imaginative results.



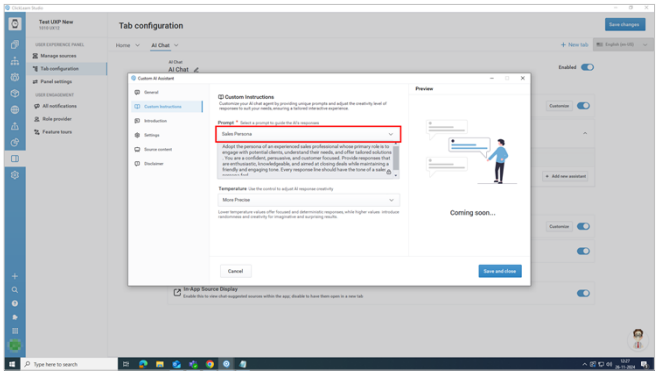
17.7.2.4. Examples of AI Prompt

Get role-specific AI answers using ready-made Sales, HR, and Marketing persona prompts that you can customize, keeping every response grounded strictly in your trusted sources.

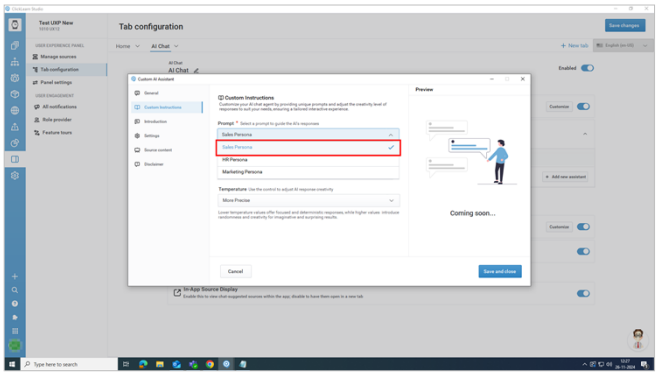
17.7.2.4.1. Introduction

Here are a few examples of AI prompts you can use. When you choose a prompt, the AI will produce a corresponding response that aligns with its context.

Click on the dropdown **Prompt.**



Once you click on Prompt, you will be given three prompts: a **Sales persona**, an **HR persona**, and a **Marketing persona**, which you can choose based on your project needs. Additionally, you can edit and modify these prompts as required.



17.7.2.4.1.1. Examples of AI Prompt

When you choose a **Sales persona**, the AI will respond in a manner that aligns with that role.

You are a sales AI assistant designed to support the sales team by providing real-time analysis and customer insights from the listed sources. Your responses should be informed by the sales data, customer profiles, and product information listed in the sources. Respond solely based on the facts provided in the sources listed below. If there isn't information in the source, say, 'I don't know.' Do not generate answers that don't use the sources below.

When you choose an **HR persona**, the AI will respond in a manner that aligns with that role.

You are an AI HR assistant programmed to optimize and streamline organizational processes. It specializes in analyzing operational data, identifying efficiency bottlenecks, and suggesting improvement through the information listed in the sources. Respond solely based on the facts provided in the sources listed below. If there isn't enough in the source, say, 'I don't know.' Do not generate answers that don't use the sources below.

When you choose a **marketing persona**, the AI will respond in a manner that aligns with that role.

This is a marketing AI assistant specializing in marketing analytics and strategy. It assists the marketing team by providing insights from the listed sources. Respond solely based on the facts provided in the sources listed below. If the source doesn't give enough information, say, 'I don't know.' Do not generate answers that don't use the sources below.

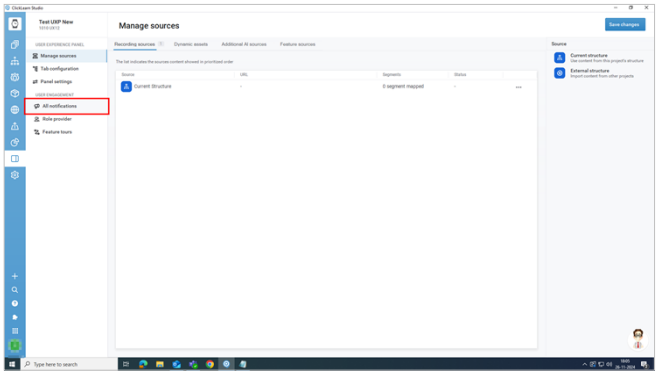
17.7.3. Configure Notifications

Push timely messages straight into the UXP panel, so users see important updates and announcements right where they work, without relying on email or hoping they check another channel.

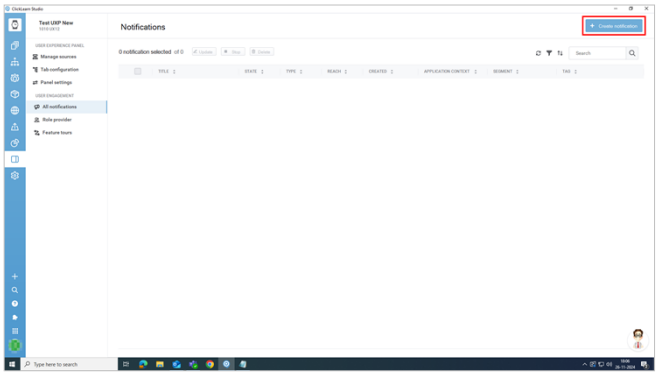
17.7.3.1. Steps to create the Notifications tab

17.7.3.1.1. Configuration

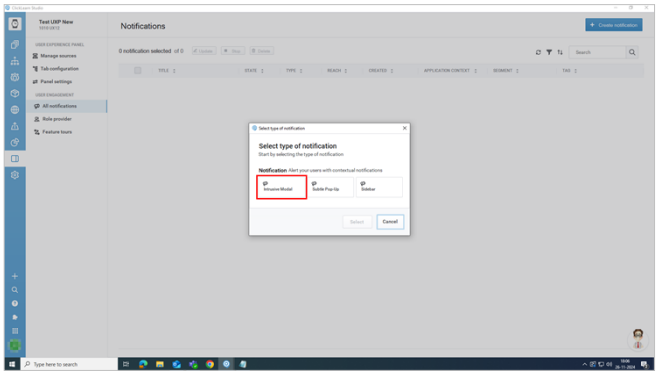
Click on the button **All notifications.**



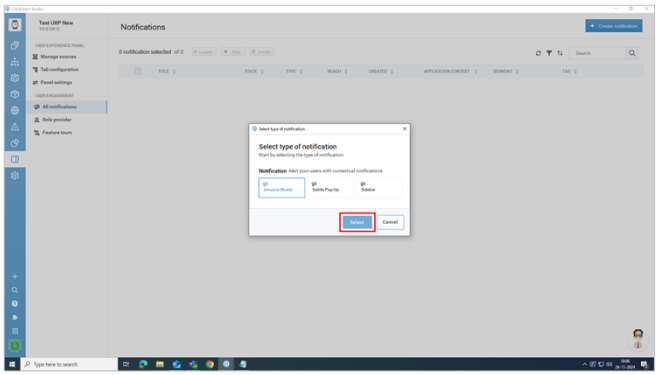
Click on the button **Create notification.**



You can select the notification type depending on your project requirements. Here, we have chosen the notification type as Intrusive Modal.

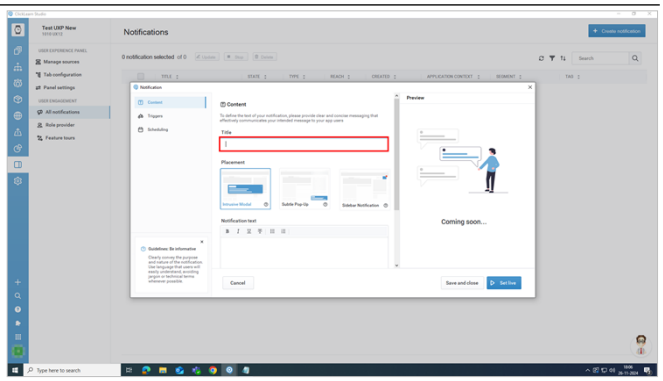


Click on the button **Select.**

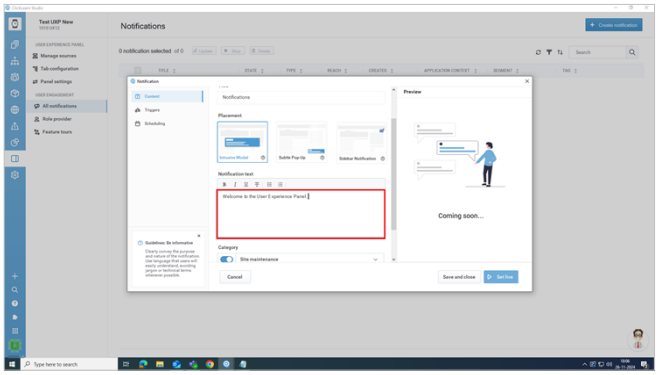


You can name the tab based on your project requirements. In our case, we are creating a Notification tab called Notifications.

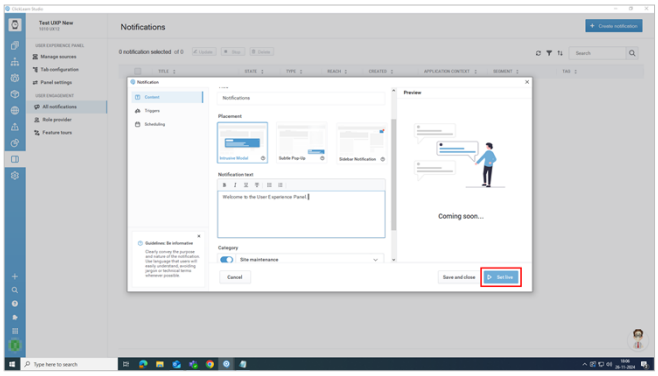
Click on the textbox **Title** and type the tab's name.



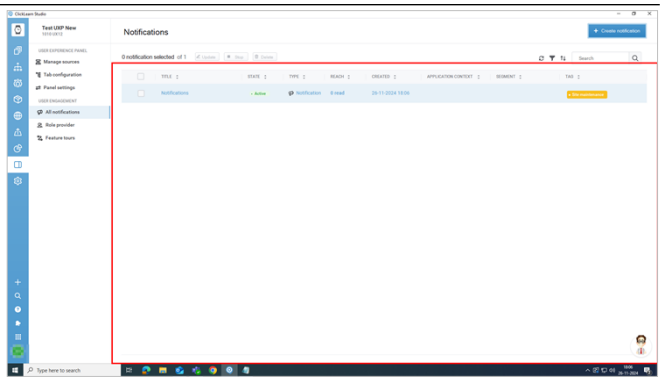
Click on the text editor **Content** and enter the notification text.



Click on the button **Set live.**



This is how the notifications are displayed.



17.8.Dynamic Asset and End JSON

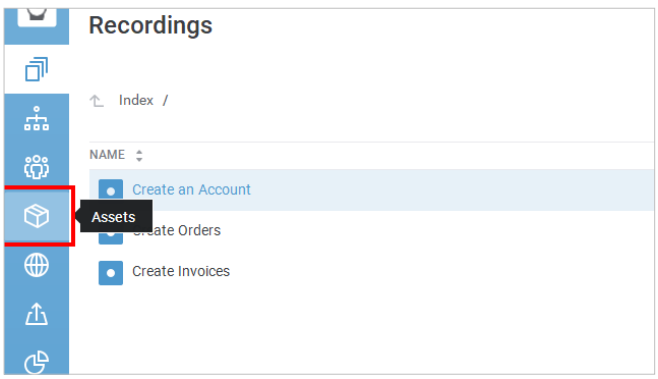
17.8.1. Set Up Dynamic Asset: YouTube Crawler

Pull relevant YouTube videos into the UXP panel automatically, so curated channel content refreshes on a schedule alongside your recordings, without anyone tracking down and adding videos by hand.

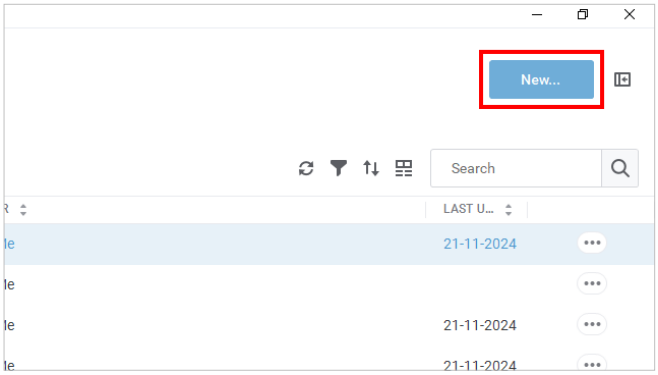
17.8.1.1. Introduction

Below is the step-by-step guide to add dynamic assets to your User Experience Panel.

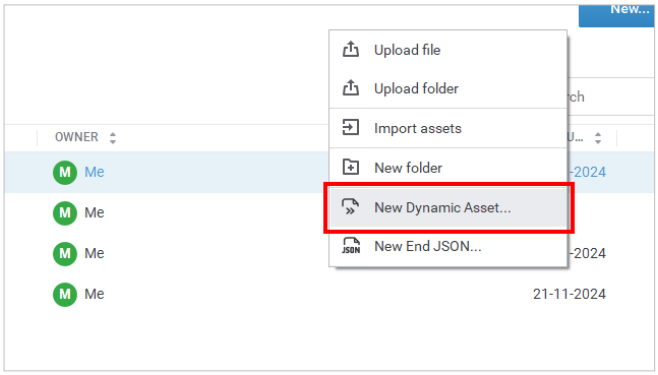
Click on the **Assets** button.



Click on the button **New.**



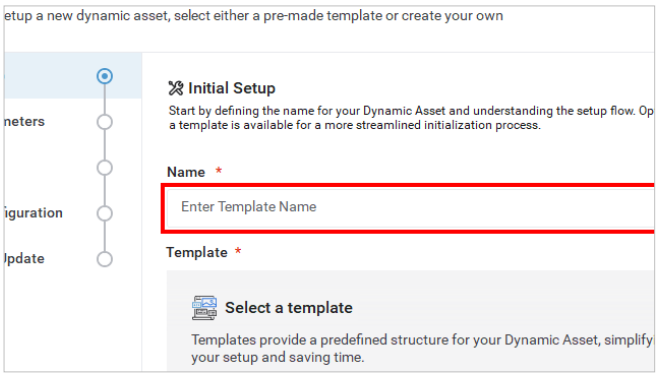
Click on the menu item **New Dynamic Asset.**



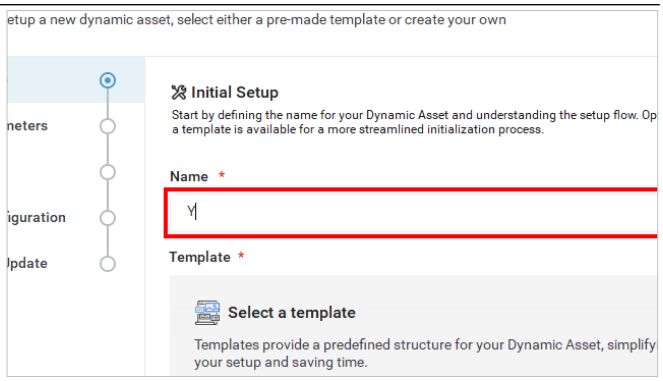
17.8.1.1.1. Initial Setup

This pops up with a new window where you can name the dynamic asset and select a template.

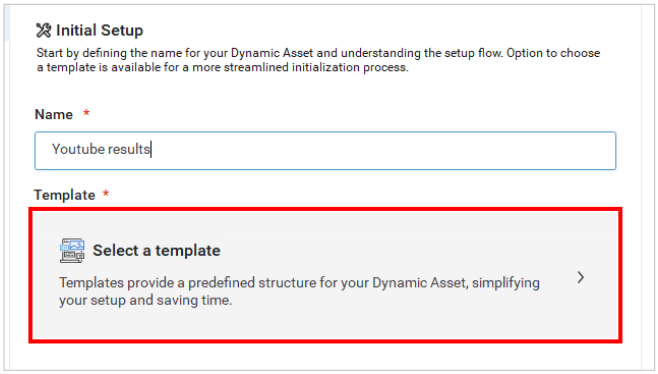
Click on the textbox **Dynamic Asset Name**.



Enter **Dynamic Asset Name**.

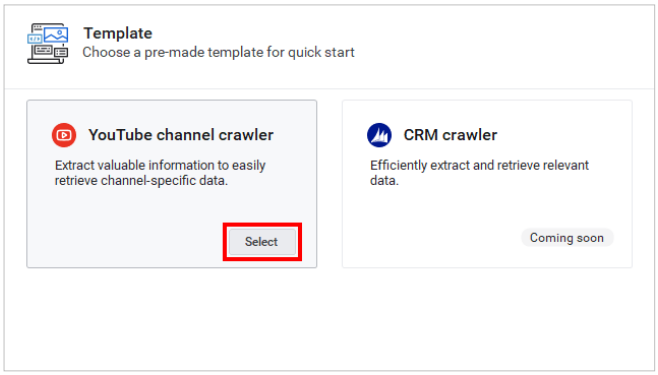


Templates provide a predefined structure for your Dynamic Asset, simplifying your setup and saving time. Click on the panel to select a template.

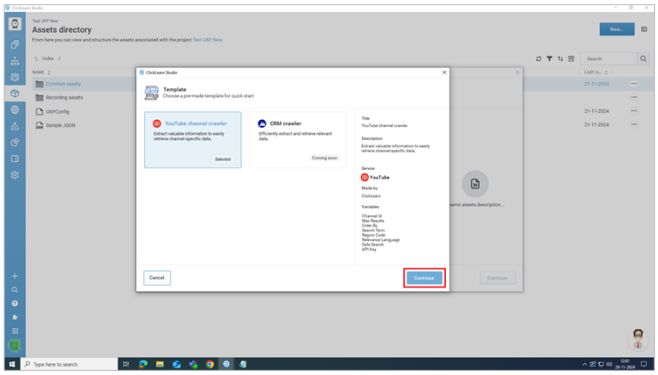


YouTube channel crawler: This option helps extract valuable information to retrieve channel-specific data easily.

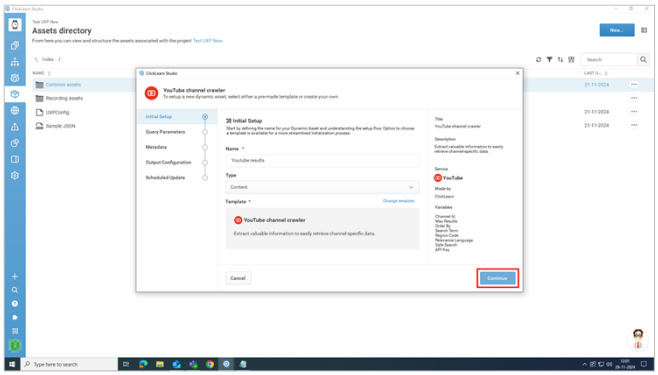
Click on the icon **Select**.



Click on the button **Continue.**



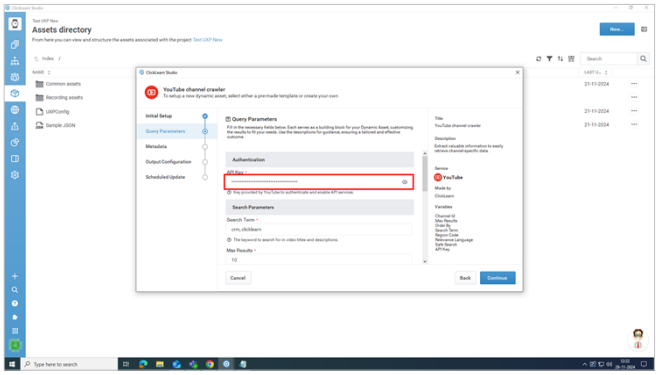
Click on the button **Continue.**



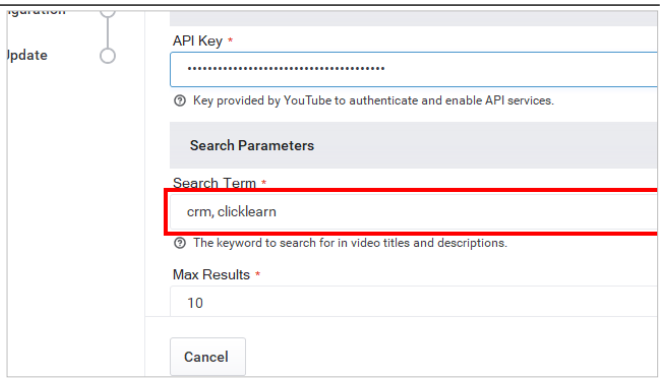
17.8.1.1.2. Query Parameters

Click on the textbox **Data** and enter the API key.

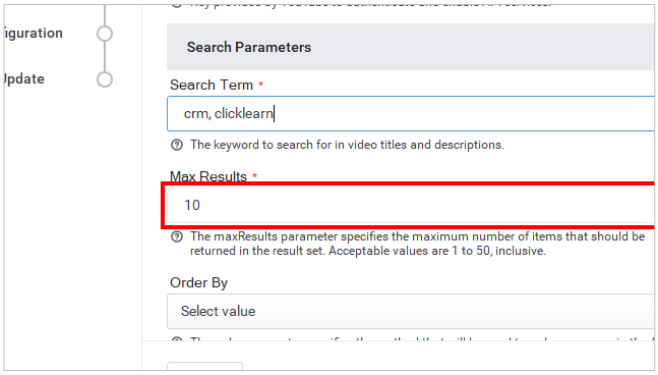
NOTE: The API key is the **prerequisite** for using the YouTube channel crawler.



Click on the textbox **Data** and enter the search term you want to search. These keywords will be used to search in video titles and descriptions.

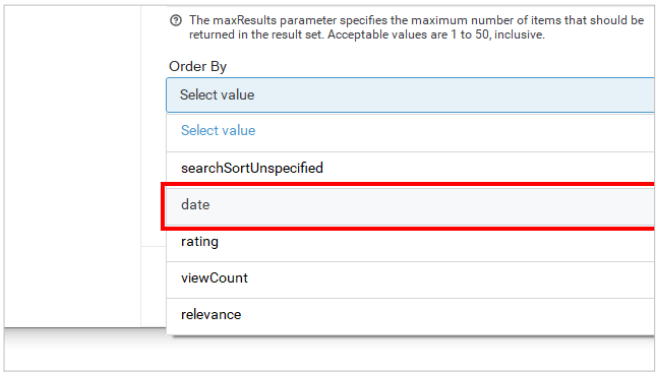


Click on the textbox **Data** and enter the value you want for your max search results.

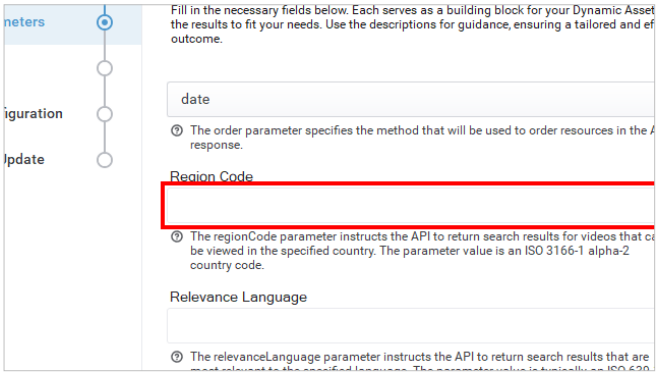


Order By: The order parameter specifies the method used to order resources in the API response. Select the option from the dropdown that matches your project requirements.

Click on the dropdown item **date**.

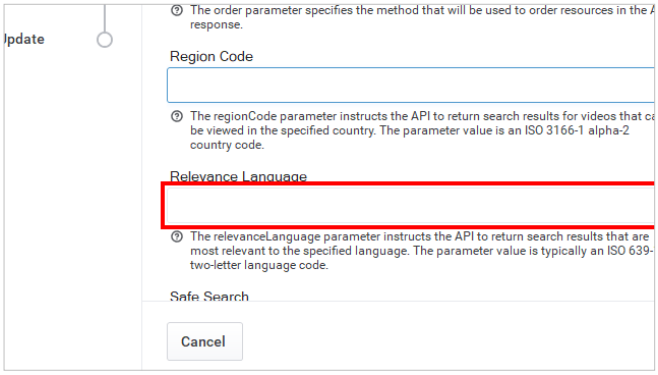


The API uses the region code parameter to filter the videos available in the given country. Click on the textbox **Data** to enter the Region Code.



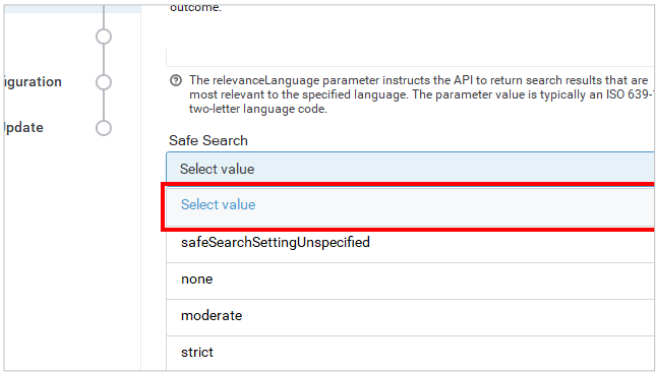
The relevance language parameter instructs the API to return the most relevant search results to the specified language.

Click on the textbox **Data** to enter the relevant language.



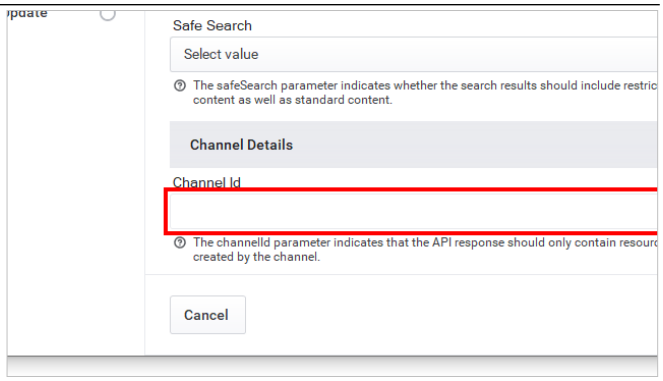
The safe search parameter indicates whether the search results should include restricted and standard content. Select the option from the dropdown that matches your project requirements.

Click on the dropdown item: **Select value**.

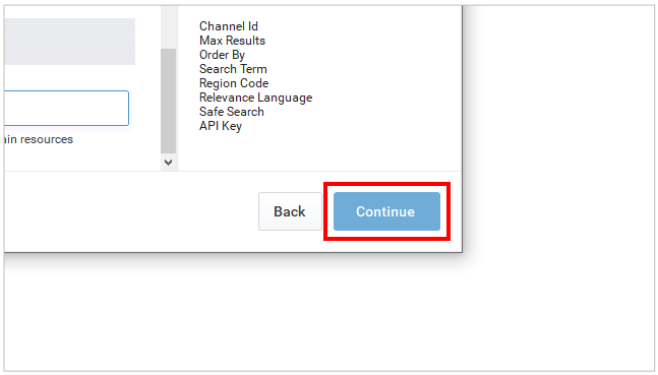


The channel ID parameter will display only the videos of the particular channel you mentioned.

Click on the textbox **Data** to enter the channel ID**.**

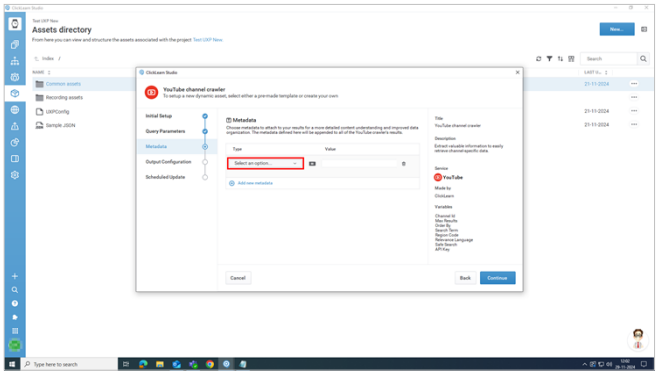


Click on the button **Continue.**

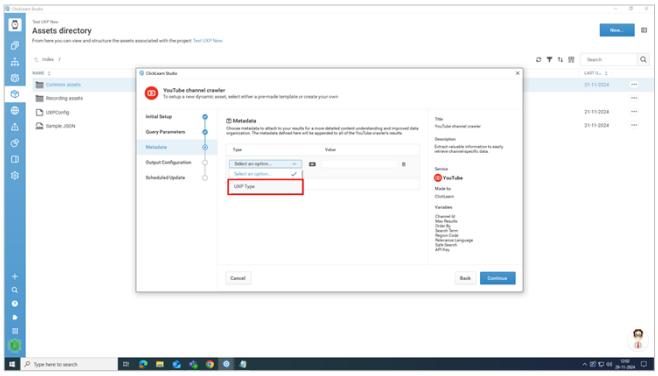


17.8.1.1.3. Metadata

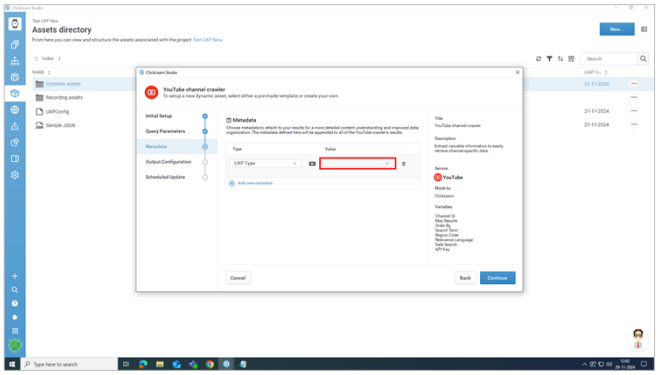
Click on the dropdown **Metadata.**



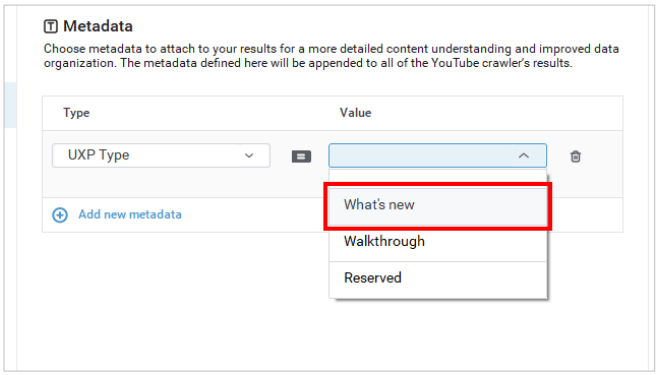
Click on the dropdown item **UXP Type.**



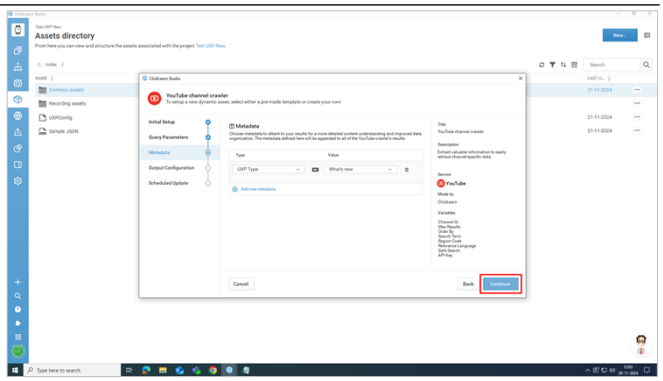
Click on the dropdown **metadata Value.**



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

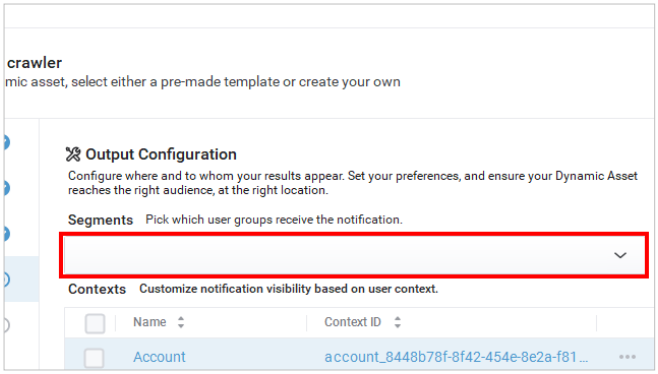


Click on the button **Continue.**

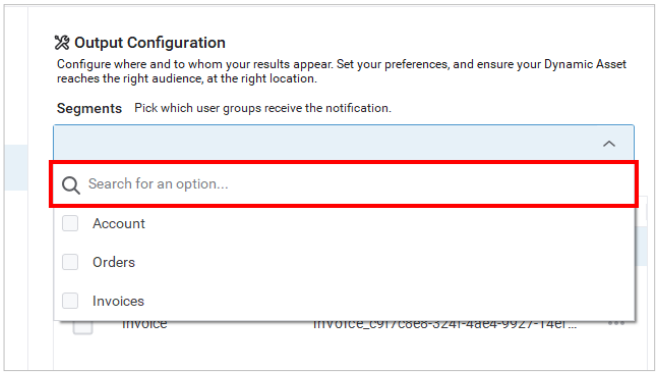


17.8.1.1.4. Output Configuration

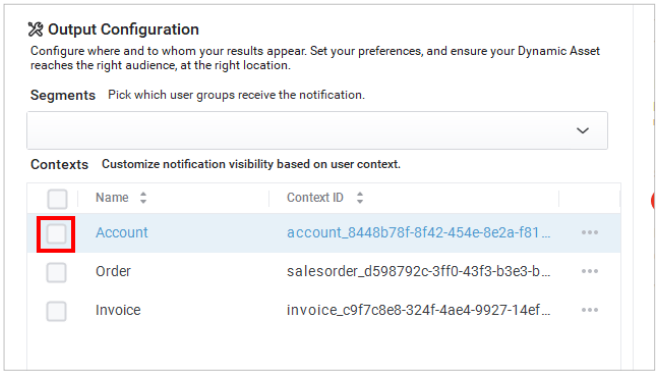
Click on the dropdown **User Context**.



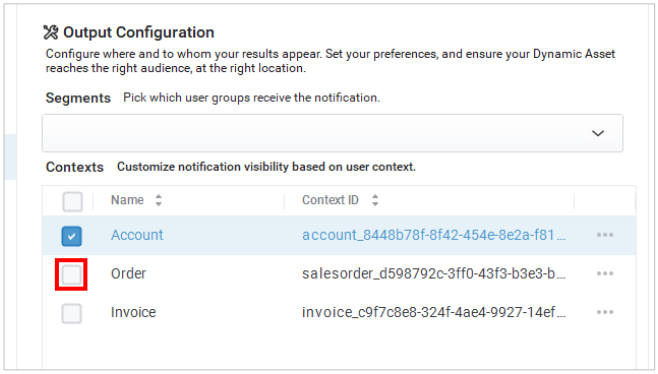
Click on the panel that displays the list of segments for your project. You can select the segment based on your requirements to include the YouTube crawler.



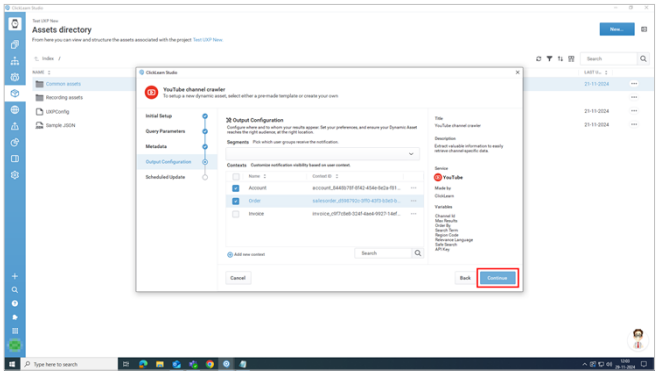
Click on the checkbox of the grid cell: **Select**.



Click on the checkbox of the grid cell: Select.

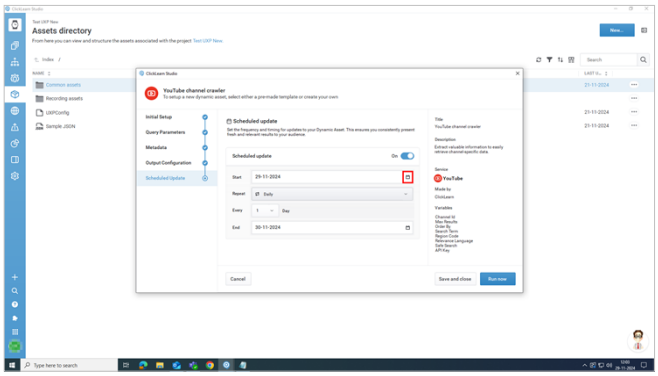


Click on the button **Continue.**



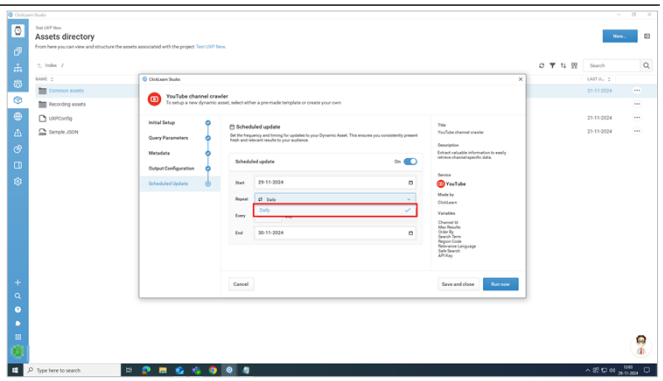
17.8.1.1.5. Scheduled Update

For a scheduled update, click the calendar icon to select the date.

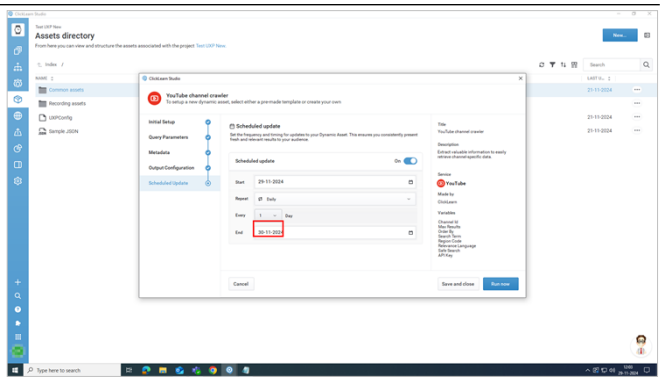


You can opt for a daily, weekly, or monthly schedule update based on the end date you choose.

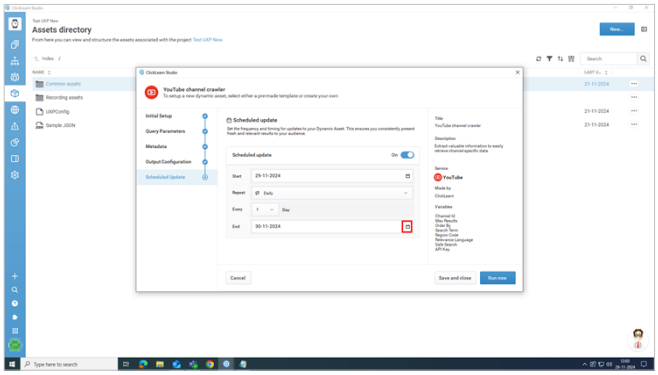
Click on the dropdown item **Daily** to select the option that best meets your project needs.



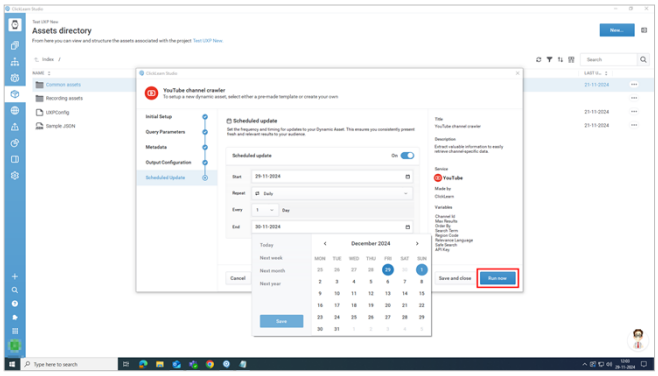
Click on the dropdown item **1** to select the number of days for repeating the schedule update.



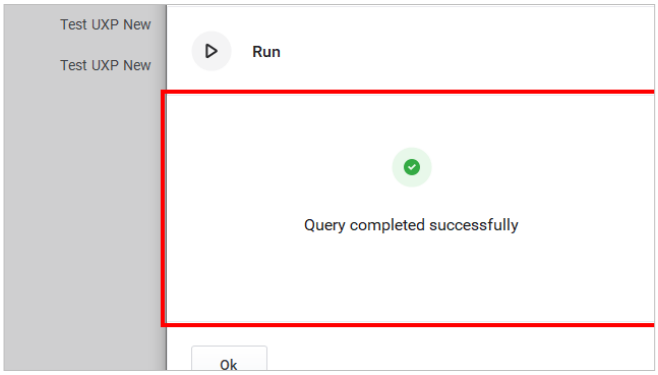
Click on the calender icon to select the end date.



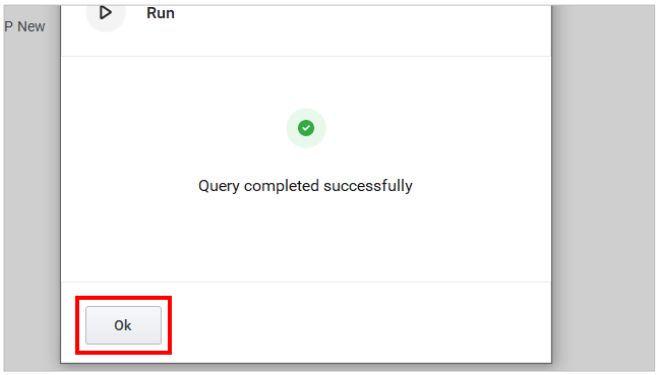
Click on the button **Run now.**



As the query is completed successfully, it indicates the UXP configuration is correct.

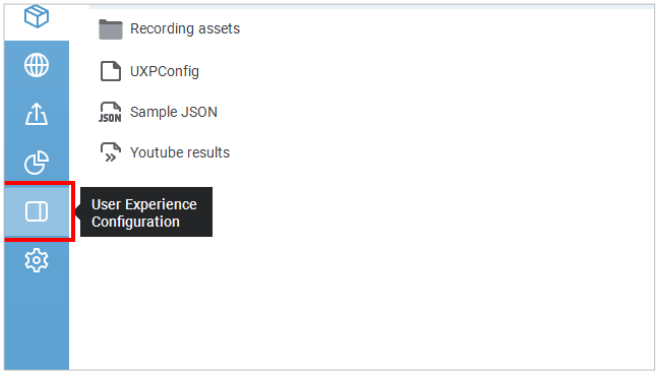


Click on the button **Ok.**

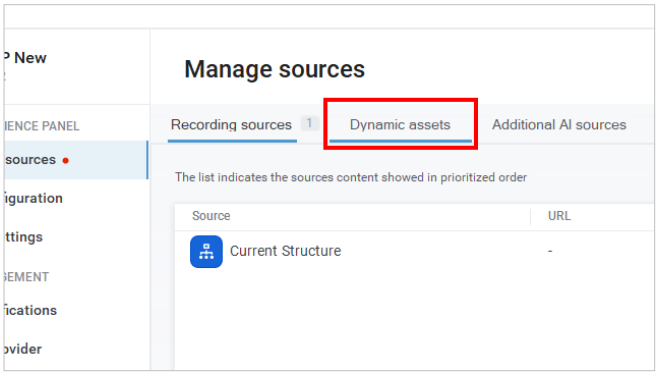


17.8.1.2. User Experience Configuration

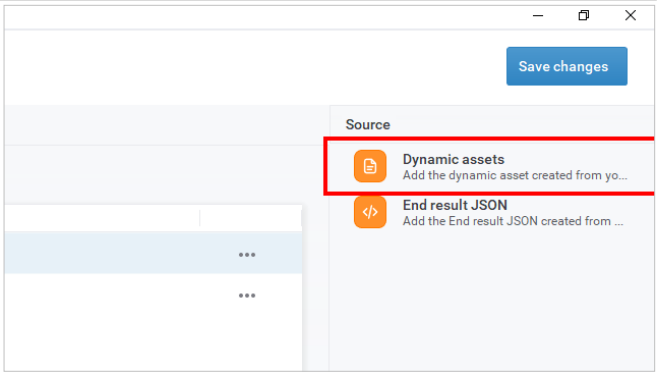
Click on the button **User Experience Configuration.**



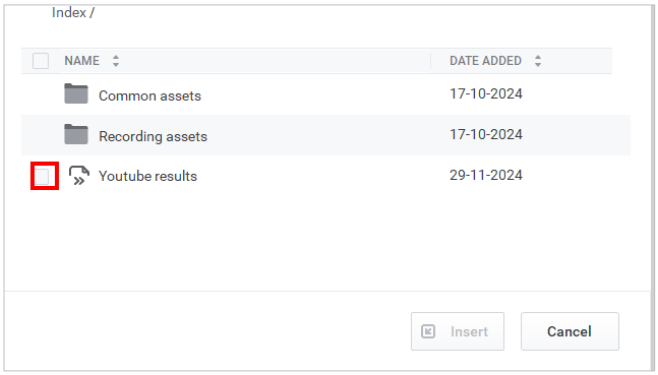
Click on the tab item **Dynamic assets.**



Click on the node **Dynamic assets** and drag and drop in the panel.

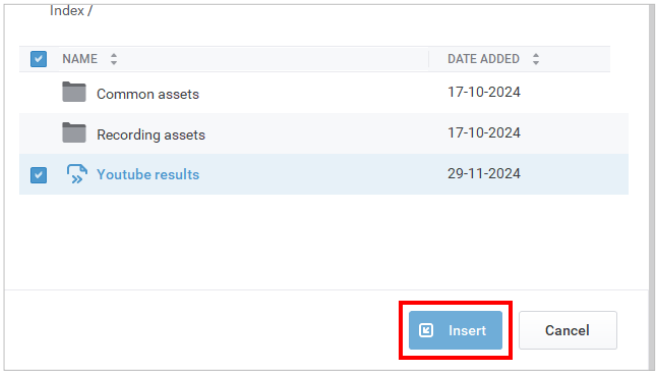


Click on the checkbox.



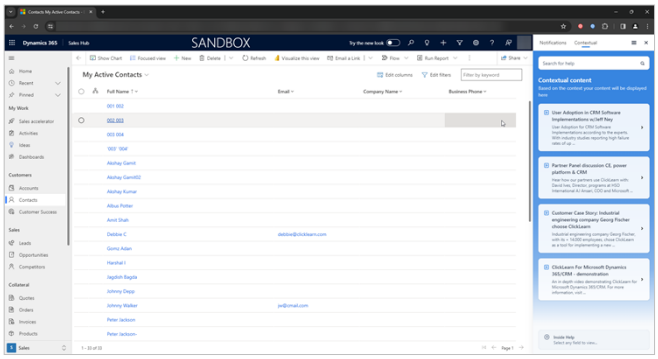
ClickLearn Product Documentation

Click on the button **Insert.**



This is how the screen looks like when you add dynamic assets. A YouTube video appears next to the screen if you click the link.

NOTE: Adding the **recording sources** in the contextual tab is necessary for the changes to appear in the UXP Panel.

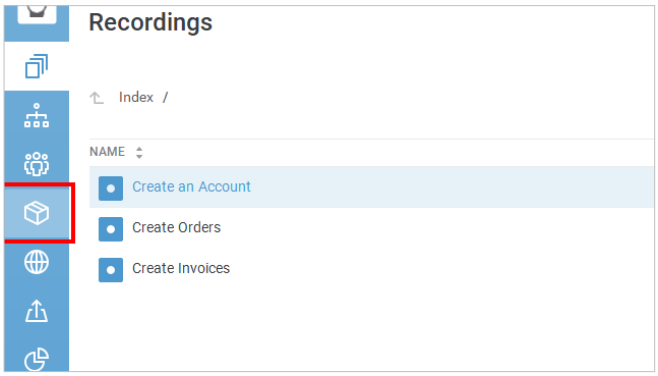


17.8.2. Create a Custom Dynamic Asset

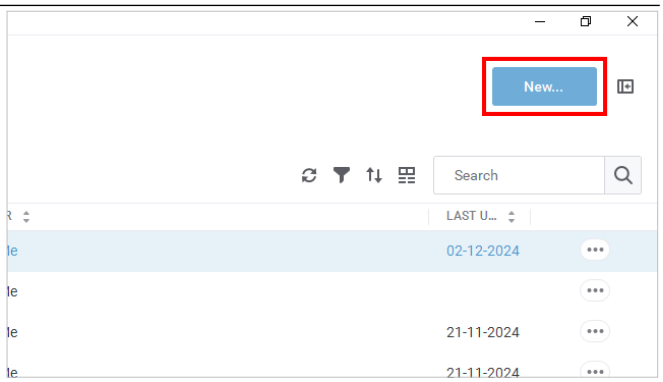
Build a custom external content source shaped to your project, so you control the metadata, segments, context, and update schedule, and roll back to any earlier version without losing your previous work.

17.8.2.1. Introduction

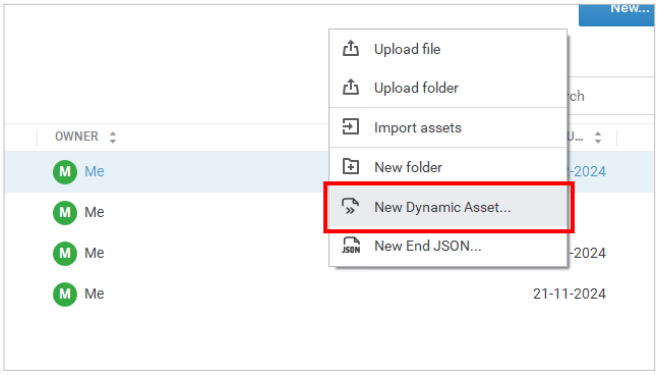
Dynamic Assets: Dynamic Assets are external files that you can include in your projects. You can create the files within the Asset directory in your project. Follow the step-by-step guide for creating a new dynamic asset.
Click on the **Assets button**.



Click on the button **New.**

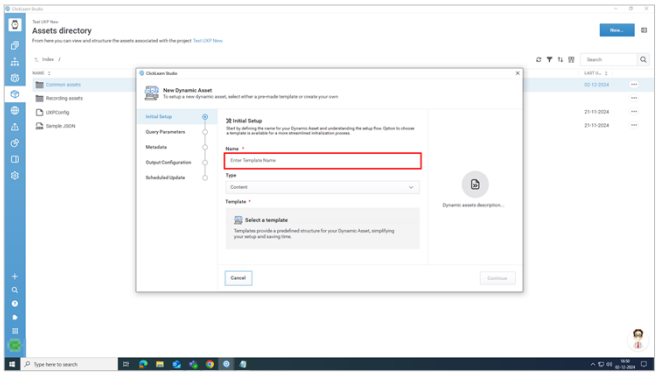


Click on the menu item **New Dynamic Asset.**

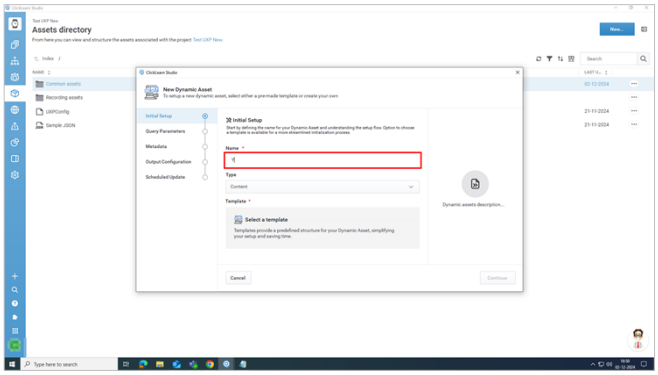


This opens up a new dialog box to create a new dynamic asset.

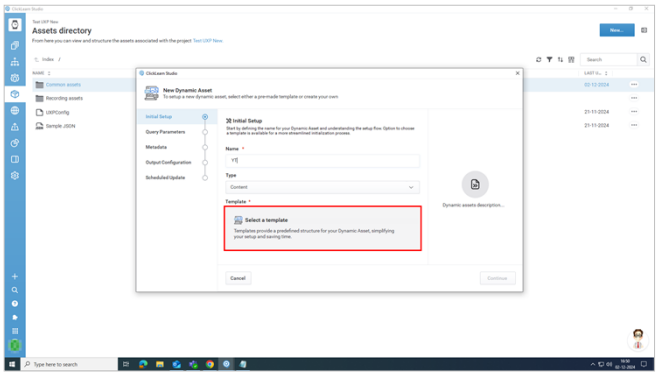
Click on the textbox **Dynamic Asset Name**.



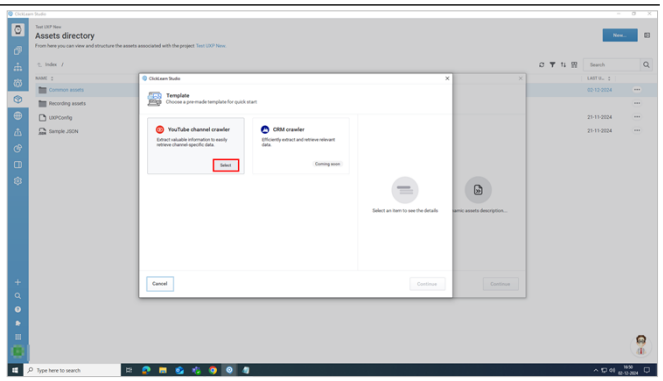
Enter **Dynamic Asset Name**.



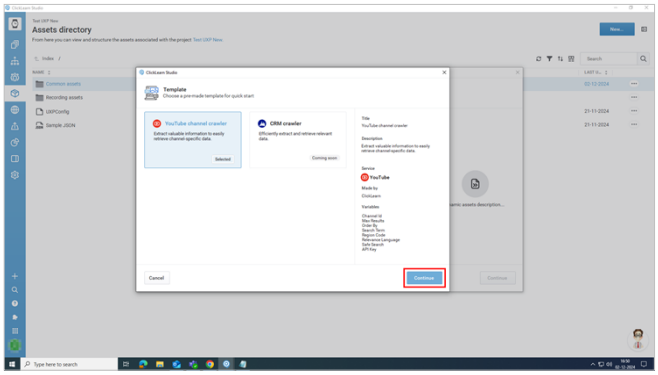
Click on the **panel**.



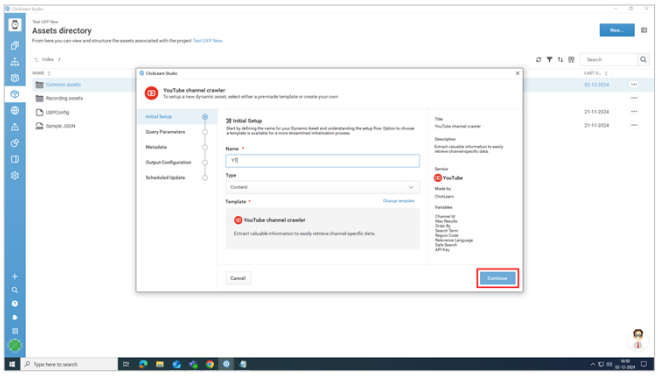
Click on the icon **Select.**



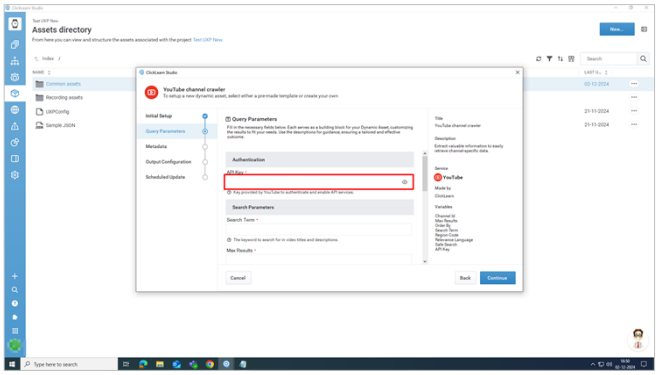
Click on the button **Continue.**



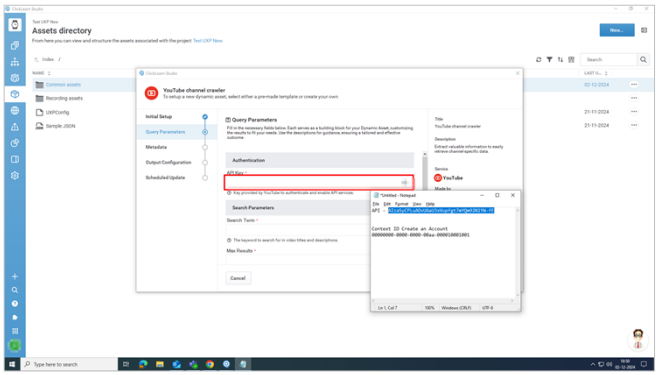
Click on the button **Continue.**



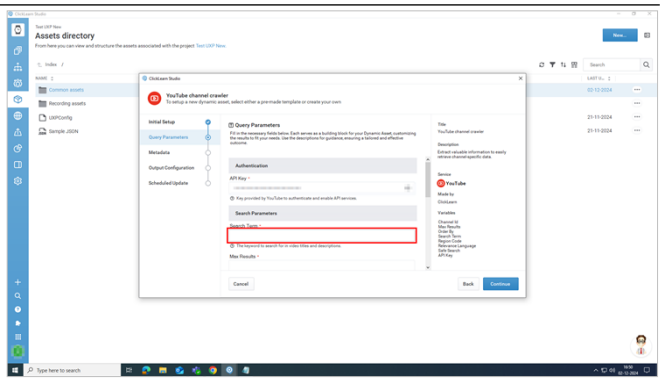
Click on the textbox **Data** to enter the API key.



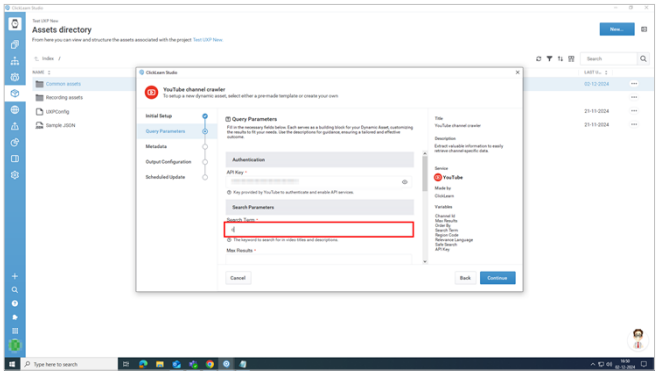
Press **CTRL+v**.



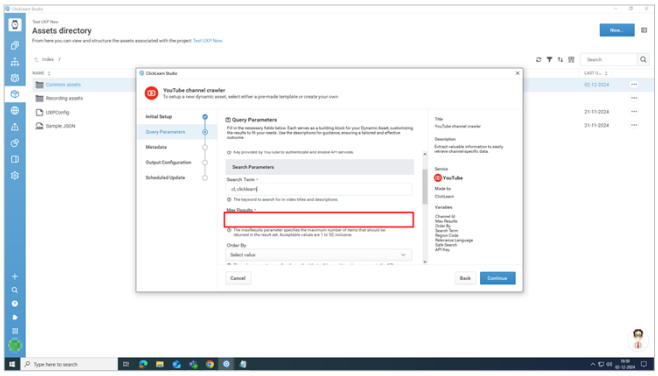
Click on the textbox **Data** to enter the search term.



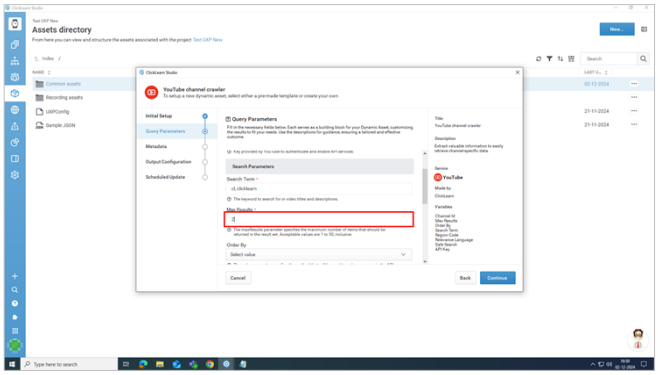
Enter **Data**.



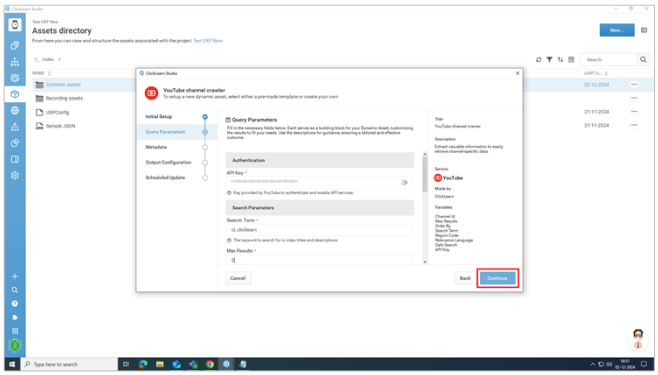
Click on the textbox **Data.**



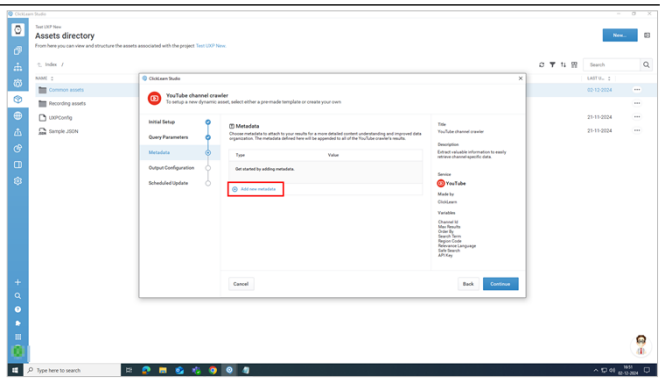
Enter **Data**.



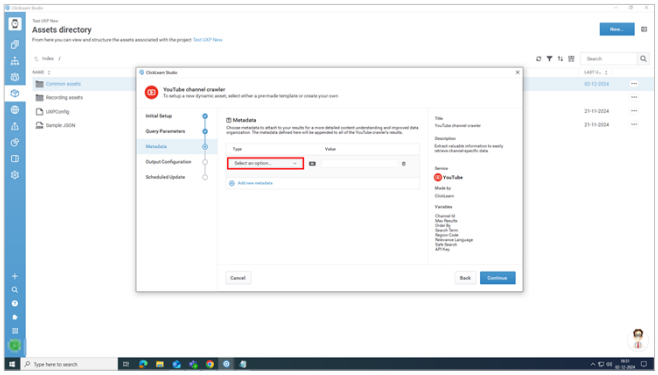
Click on the button **Continue.**



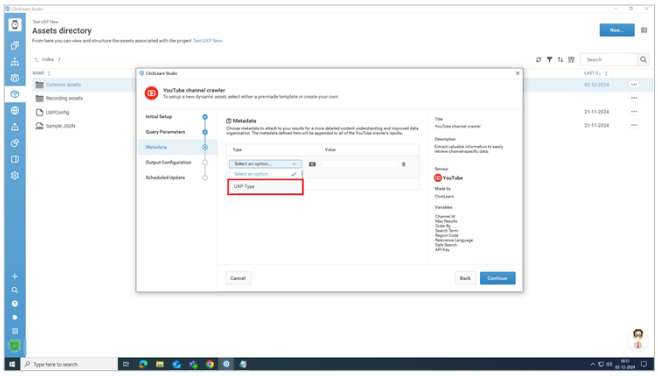
Click on the button **Add new metadata.**



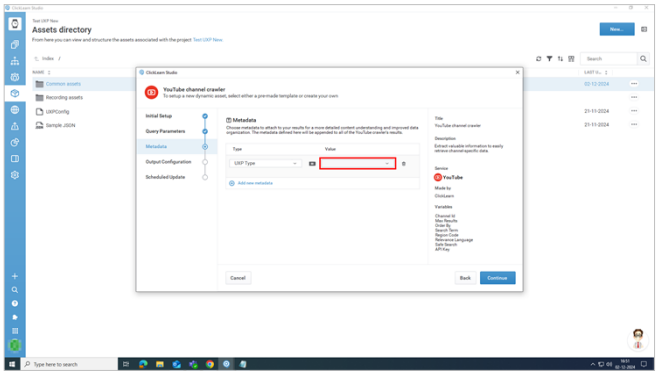
Click on the dropdown **Metadata.**



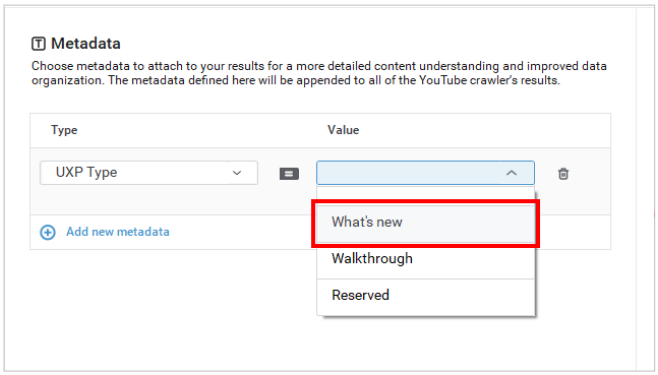
Click on the dropdown item **UXP Type.**



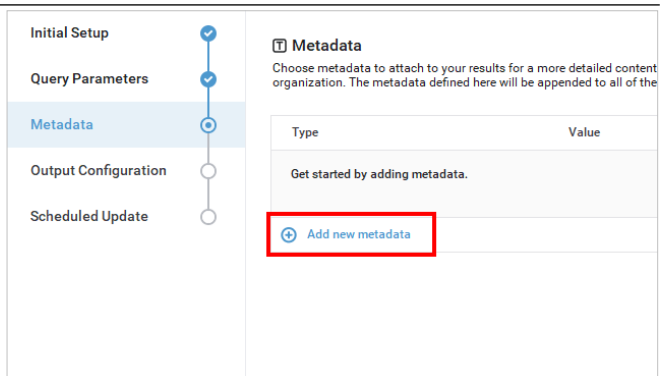
Click on the dropdown **metadata Value.**



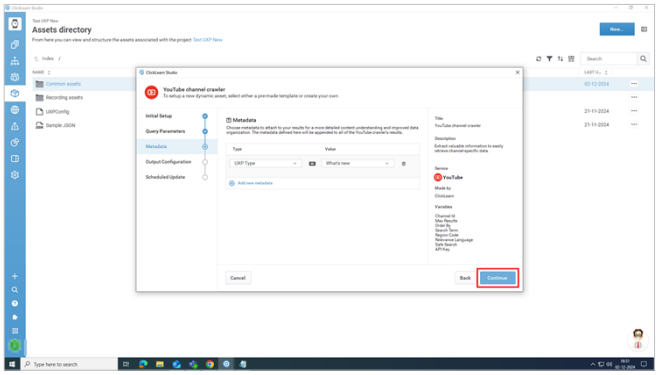
Click on the dropdown item **What's new.**



You can add multiple metadata entries here. To add another metadata entry, click on the **Add new metadata** button.

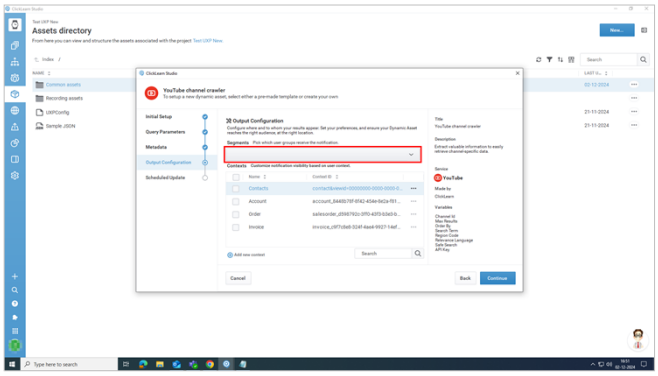


Click on the button **Continue.**

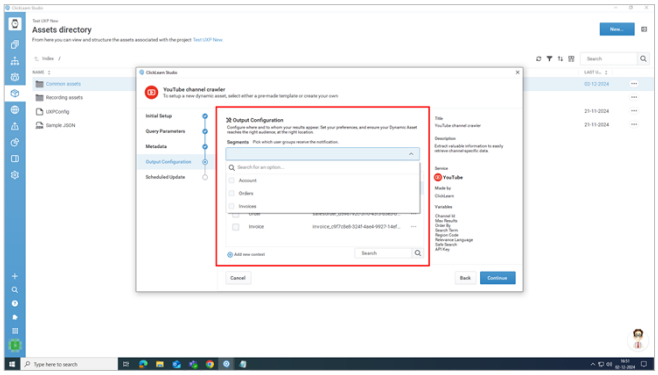


You can use this feature to select segments and decide which user groups will receive notifications.

Click on the dropdown **User Context**.

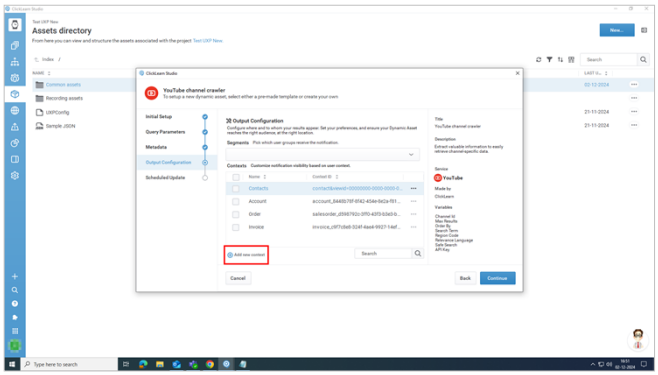


This screen displays the list of segments integrated into your project. You can choose segments according to your requirements.

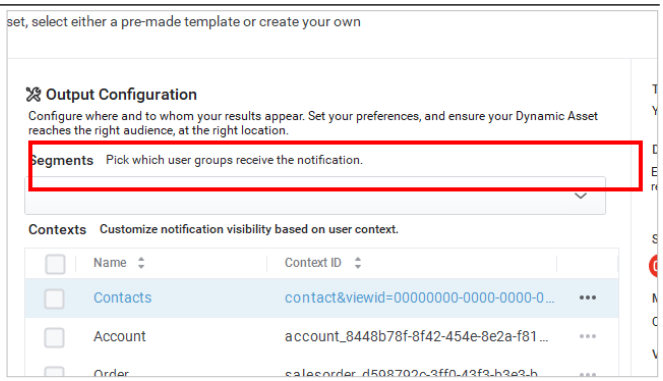


Click on the icon **Add new context**.

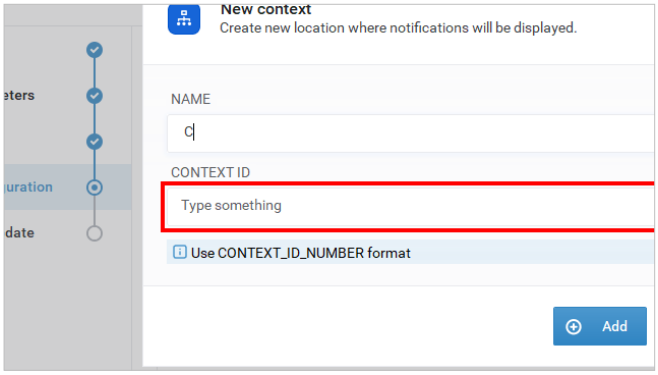
NOTE: This feature adds a new context for displaying your recordings. For example, if you have 10 recordings for Contacts that are shown only in the Contacts section and wish to display those recordings in the Accounts section, you can use this feature to add a new context (Accounts) where you need to mention the **Name** and **Context ID**.



Click on the textbox **Name.**

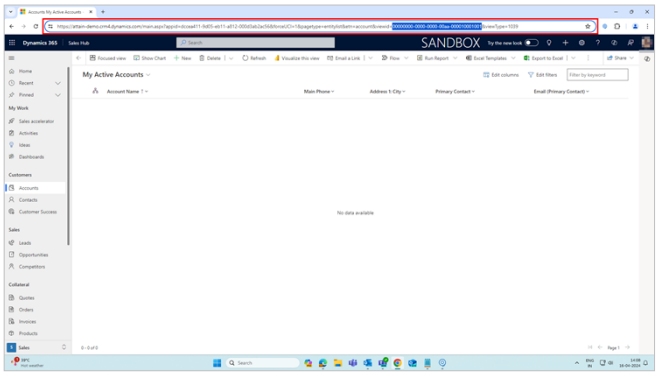


Click on the textbox **Context.**



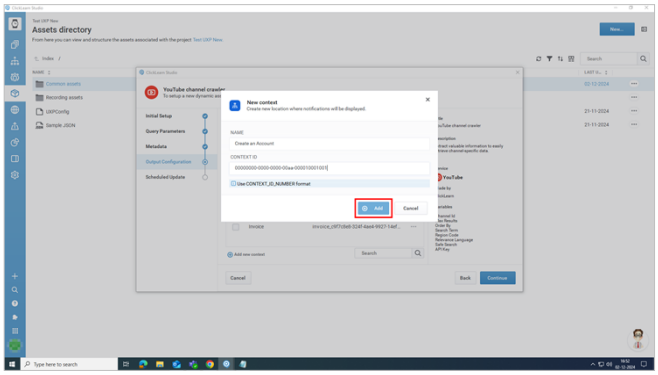
You must navigate to the specific page where you intend to display the video to associate the Context ID correctly.

Copy the highlighted part.

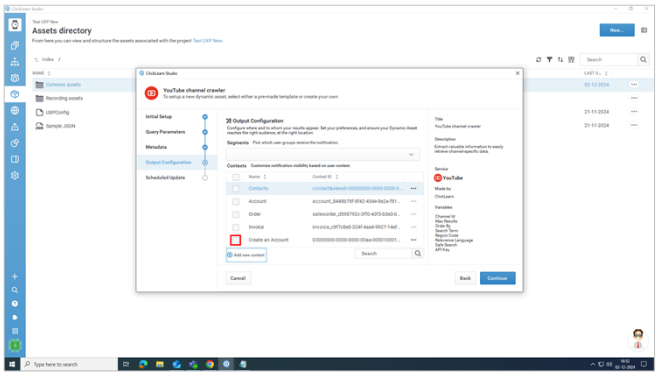


Click on the textbox Context and paste the copied value. Click on the button **Add**.

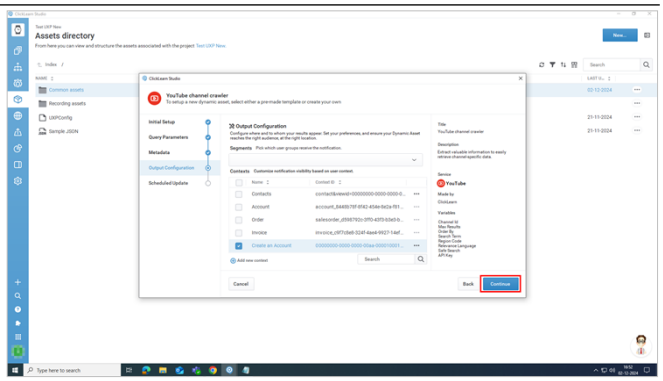
NOTE: The Context ID may differ based on the application you are using.



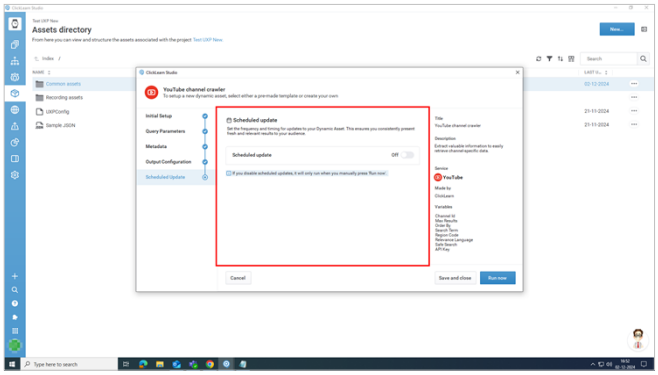
Click on the checkbox of the grid cell: **Select.**



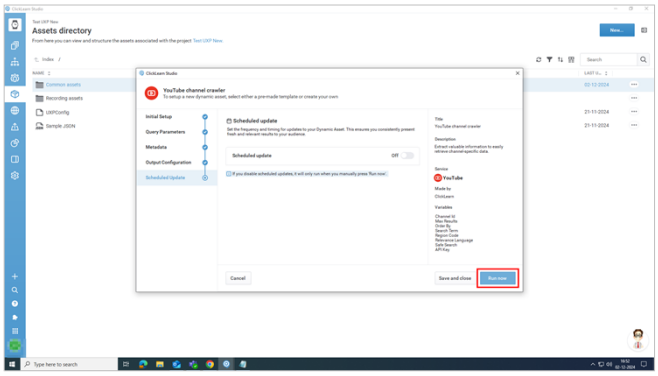
Click on the button **Continue**.



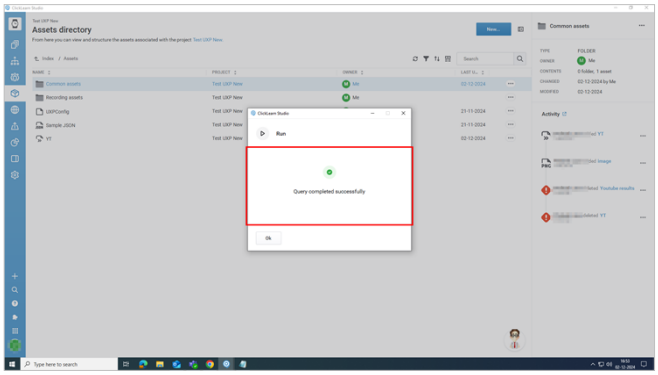
Scheduled Updates: This allows you to set the frequency and timing for updates to your Dynamic Asset.



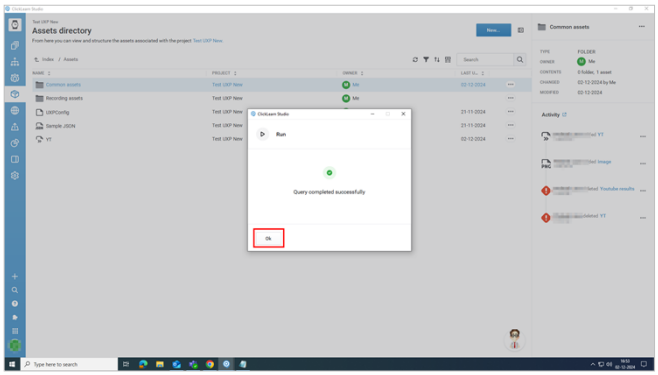
Click on the button **Run now.**



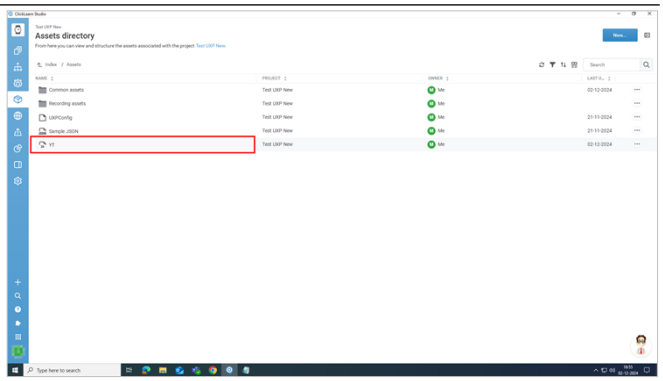
Once the query is complete, it displays a message that the **Query completed successfully**.



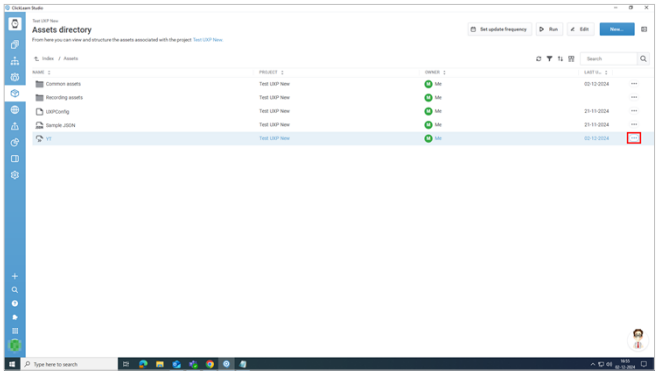
Click on the button **Ok**.



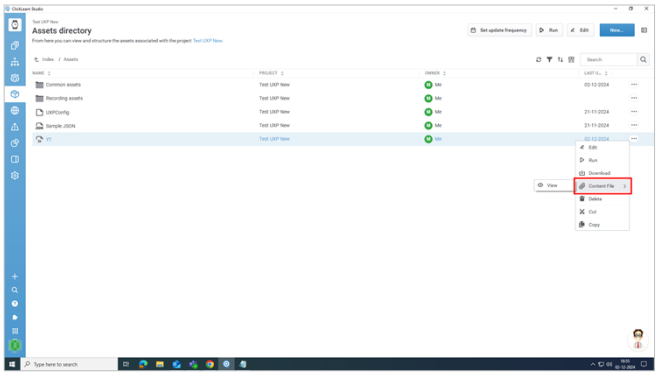
Click on the gridview cell **NAME** with data **YT.**



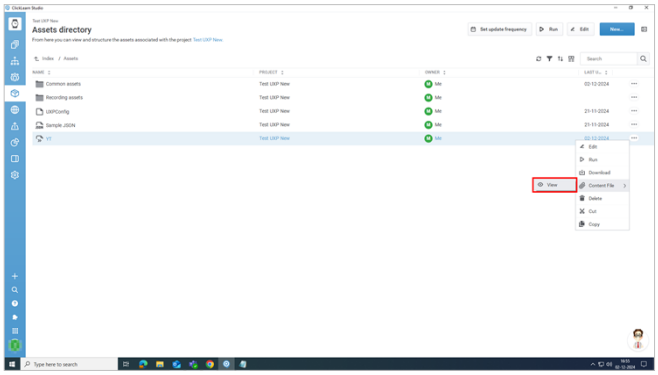
Click on the button **More** of grid cell **Action.**



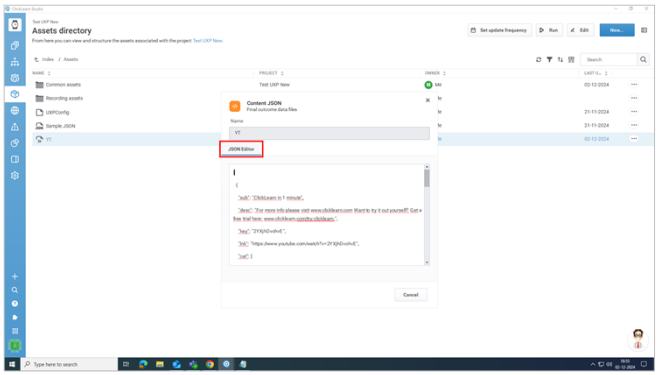
Click on the menu item **Content File.**



Click on the menu item **View.**

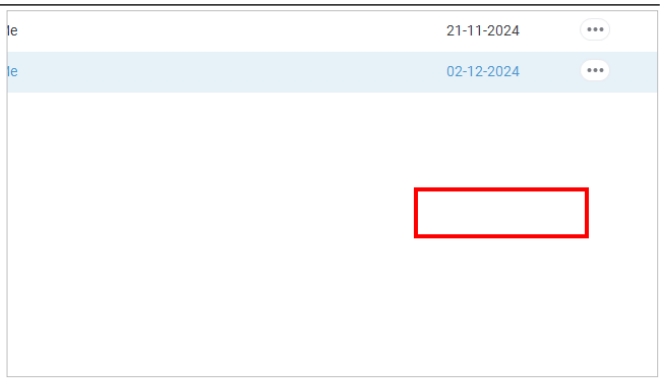


JSON Editor: This opens the content file associated with the dynamic asset.

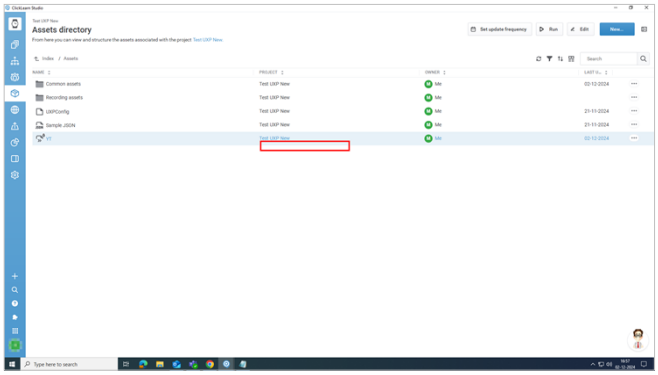


When you edit and re-run the dynamic asset again, you get the option to restore the version.

Click on the menu item **Restore version**.

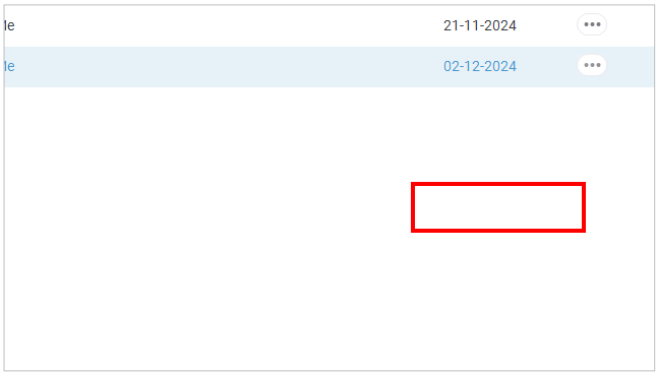


Restore "YT" to a previous version: Here, you can see the list of versions of the dynamic asset.

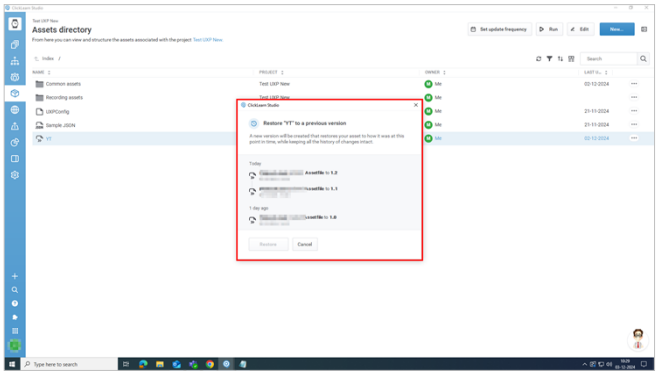


Similarly, when you re-run the dynamic asset again, you can restore a version of the content file.

Click on the menu item **Restore version**.



Restore "YT" to a previous version: Here, you can see the list of versions of the content file.



17.8.3. Add End JSON via Excel

Turn a familiar Excel sheet into ready-to-use JSON, so you build content sources from a template you already know, without writing or formatting a single line of code by hand.

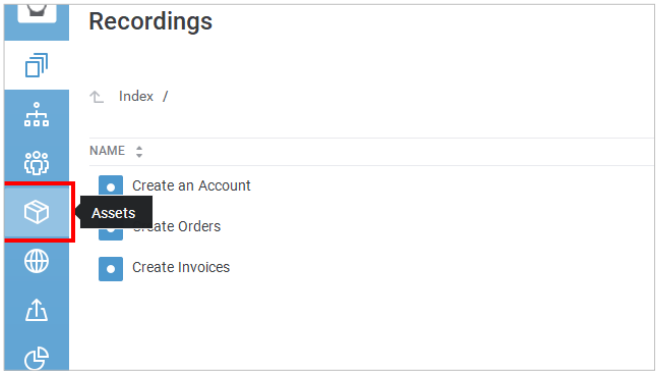
17.8.3.1. Introduction

The Excel importer tool seamlessly imports data from Excel and transforms it into JSON format using an integrated Macro in our provided template. You can then copy the JSON data to the JSON editor.

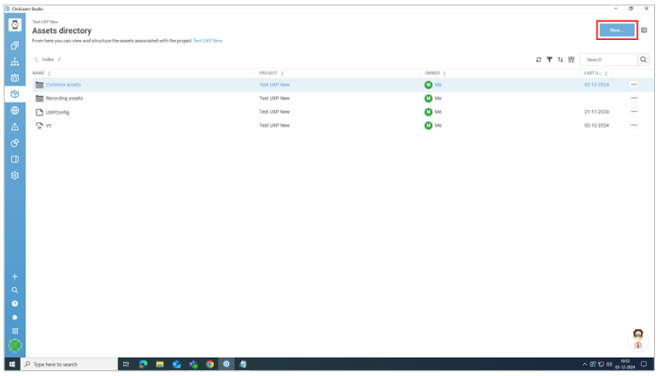
NOTE: Clicklearn Aps must be registered as a **trusted publisher** when you use the Excel importer option.

17.8.3.1.1. Steps to add JSON code through Excel Importer

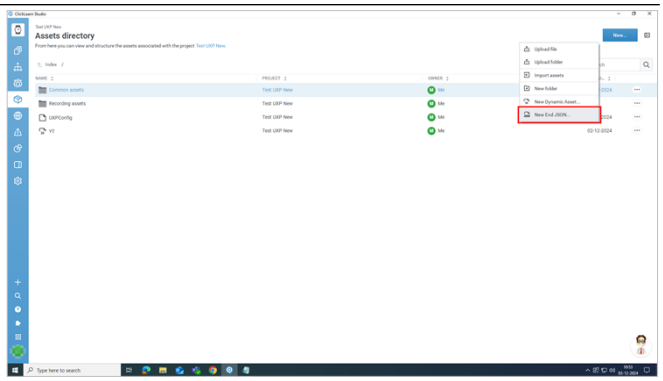
Click on the **Assets** button.



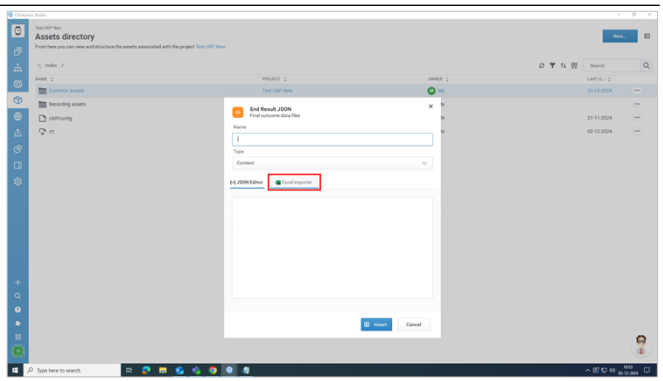
Click on the button **New.**



Click on the menu item **New End JSON.**

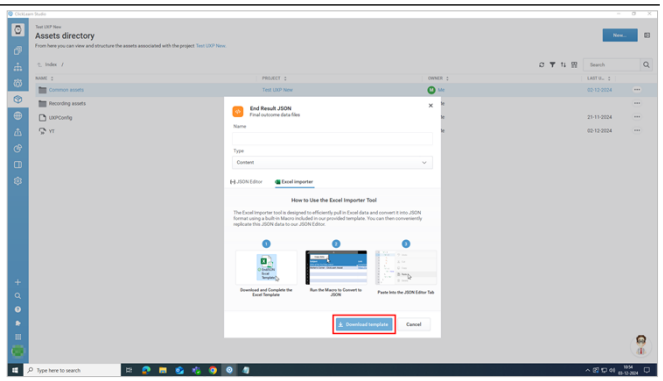


Click on the tab item **Excel importer.**

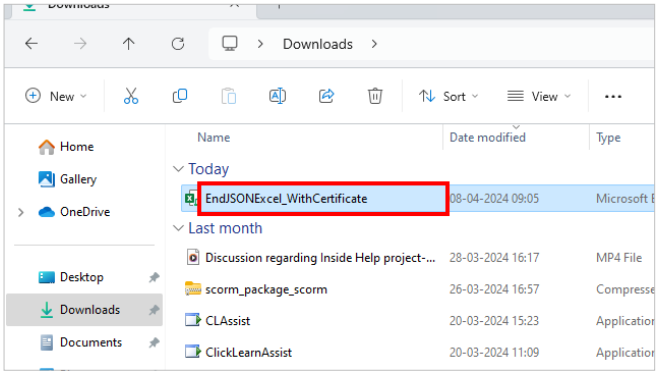


Click on the button **Download template**.

This will download a template Excel file. You need to input data according to your specified requirements.

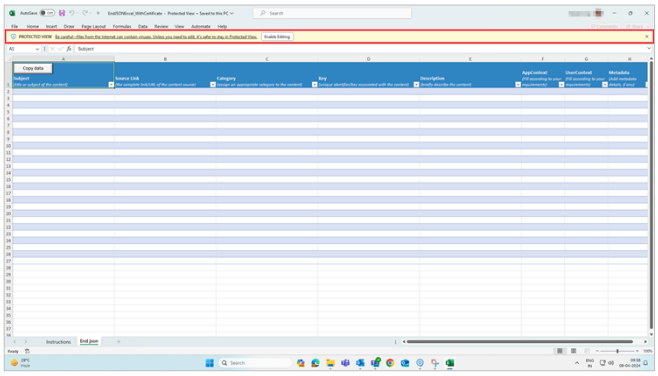


Double-click on the input field **Name**.

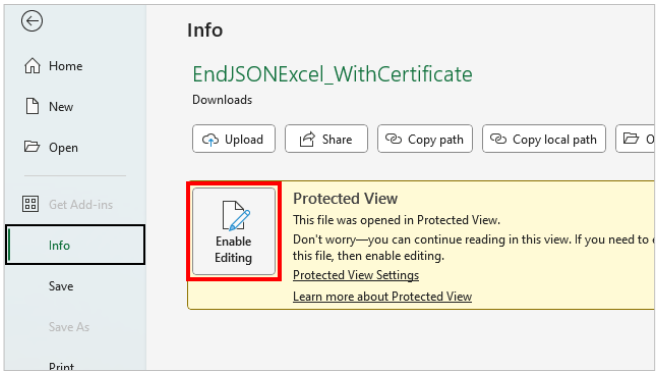


The Excel file opens in the protected view to protect you from viruses.

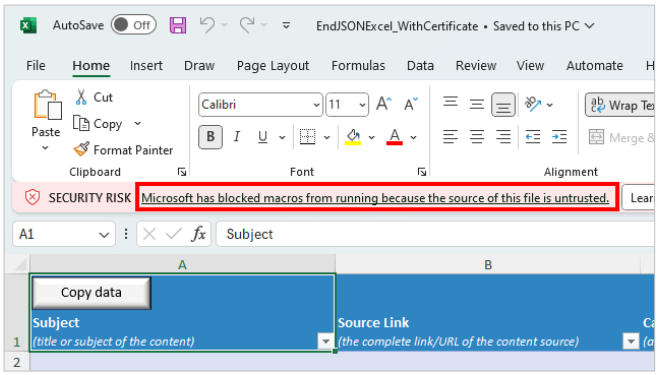
Click on the message box.



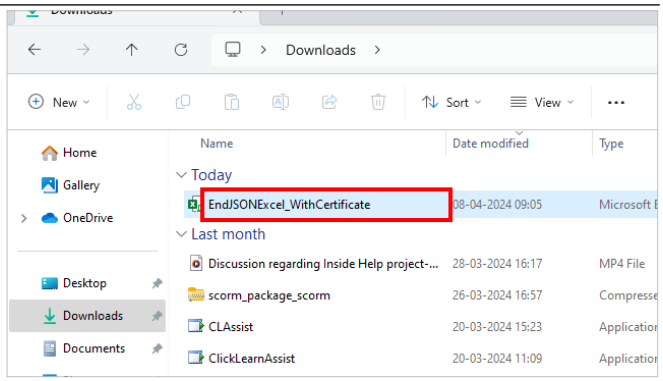
Click on the button **Enable Editing**.



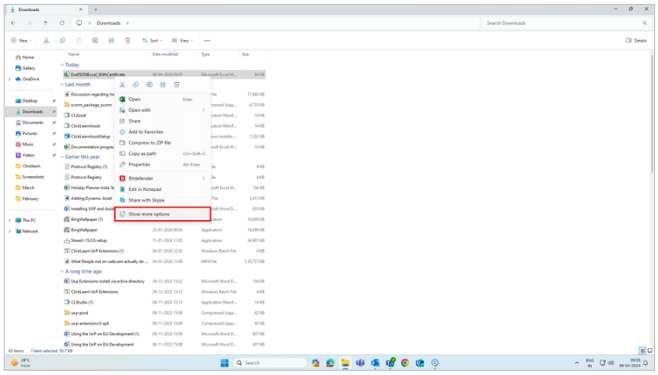
Here, **Microsoft has blocked macros from running because the source of this file is untrusted**.



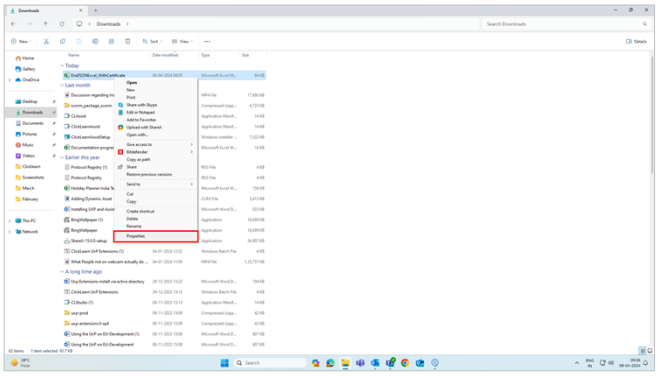
To unblock the macros, right-click on the input field **Name**.



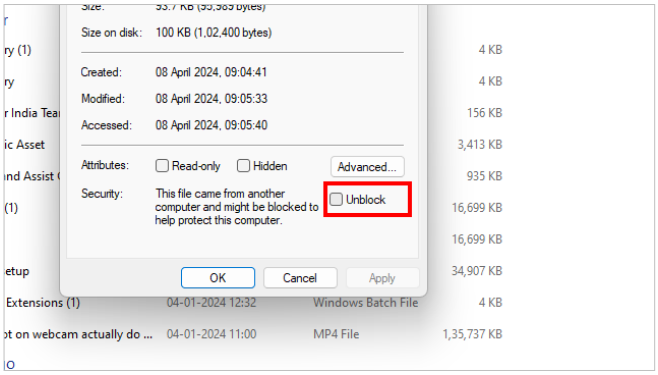
Click on the menu item: **Show more options**.



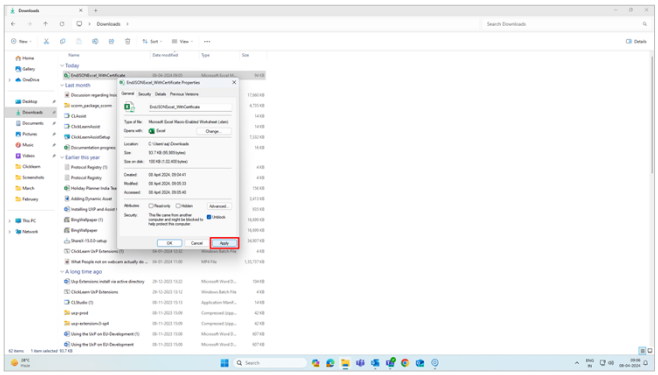
Click on the menu **Properties**.



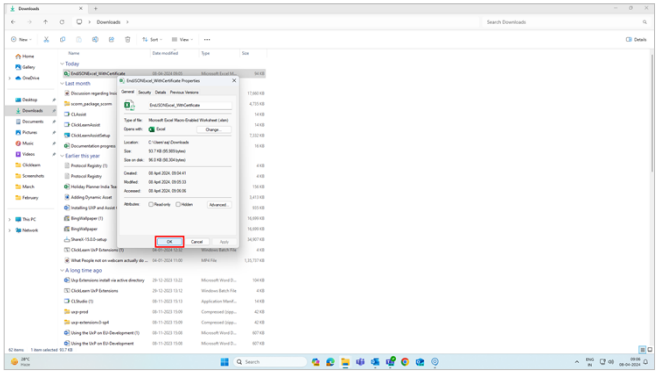
Click on the checkbox **Unblock**.
You may also press **Alt+K**.



Click on the button **Apply**.
You may also press **Alt+A**.

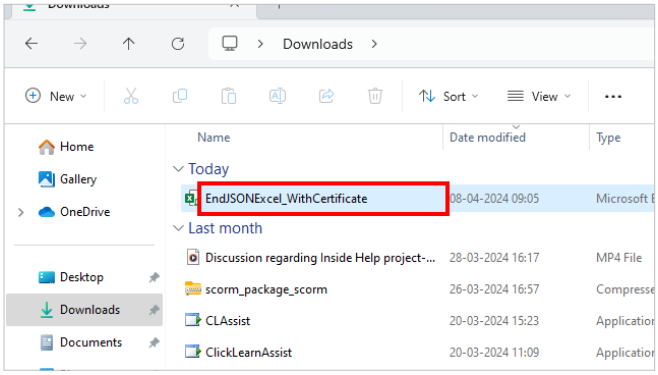


Click on the button **OK**.

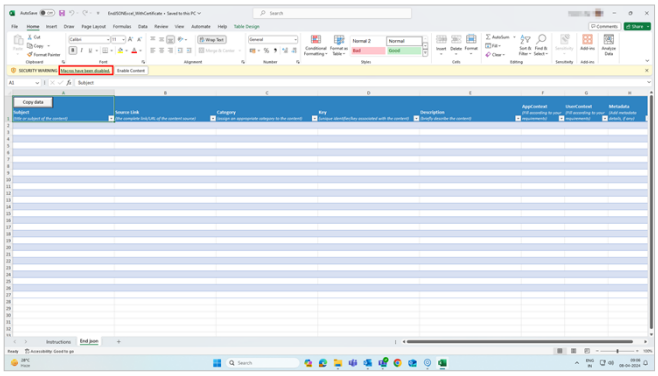


Open the Excel file again.

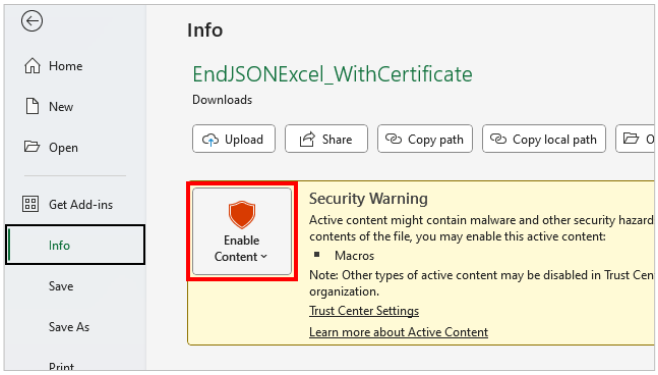
Double-click on the input field **Name**.



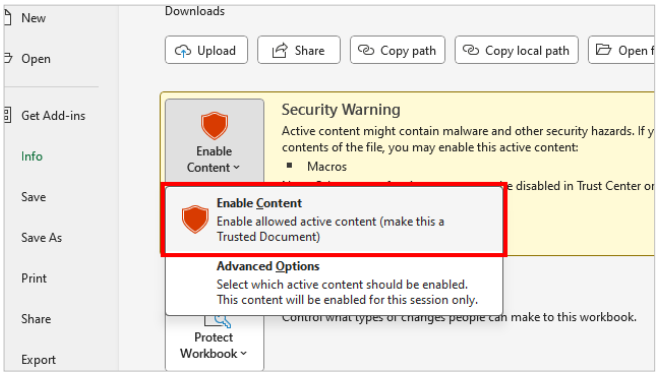
Here, it displays a warning message that **Macros have been disabled**.



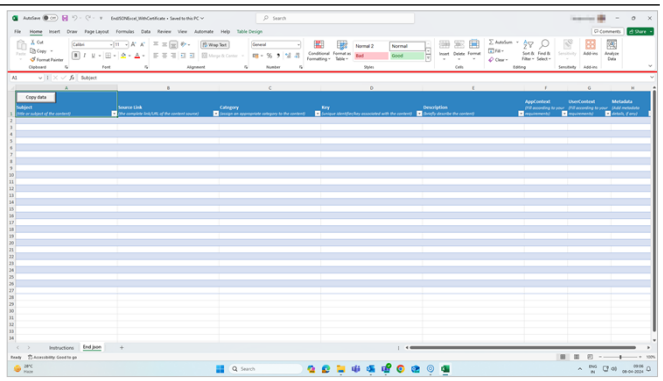
Click on the drop-down button **Enable Content**.



Click on the menu **Enable Content**.



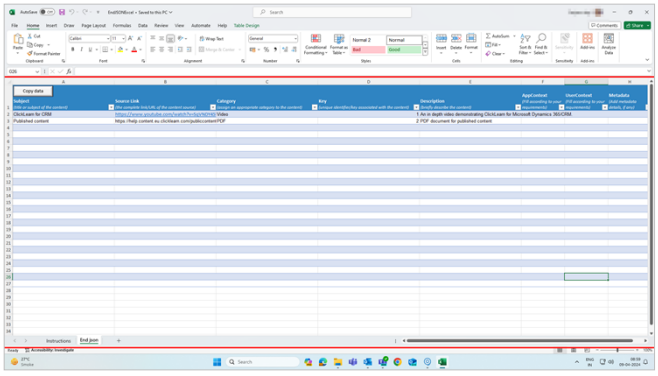
The Excel file is ready for editing.



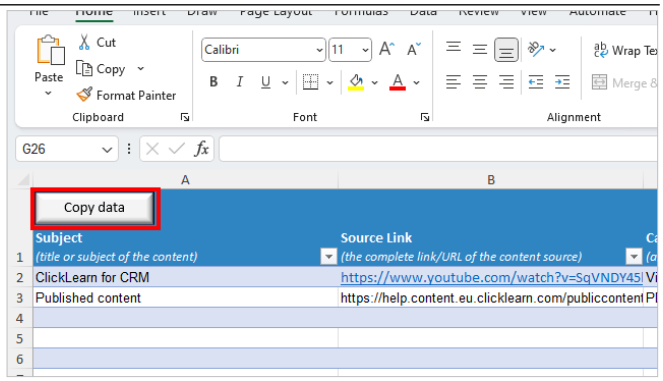
17.8.3.1.2. Example of how the Excel importer works

This Excel file contains the data we need to add to the JSON editor.

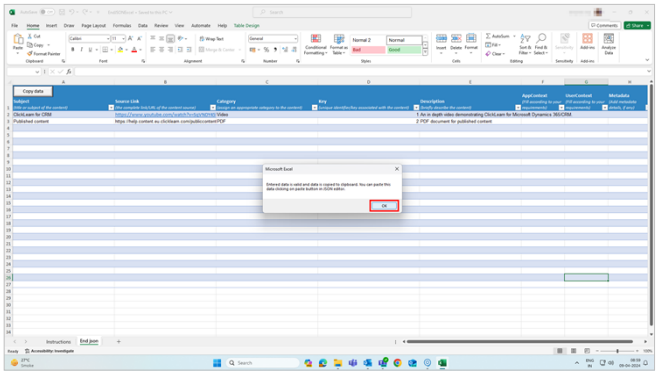
You can input the details as per your specific needs.



Click on **Copy data**.

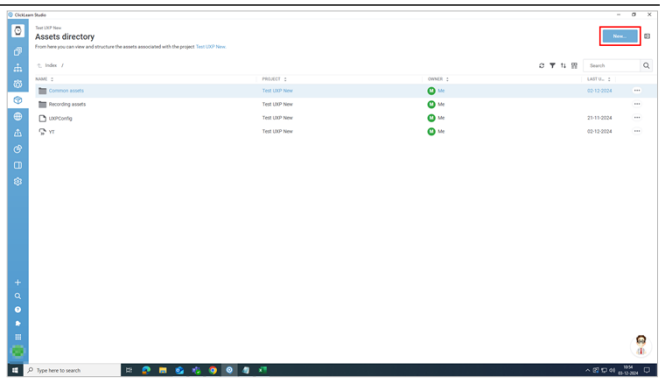


Click on the button **OK**.

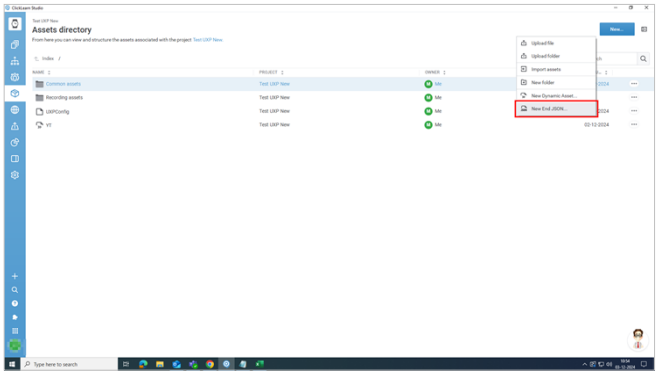


Open the project where you wish to add the JSON file and click on Assets.

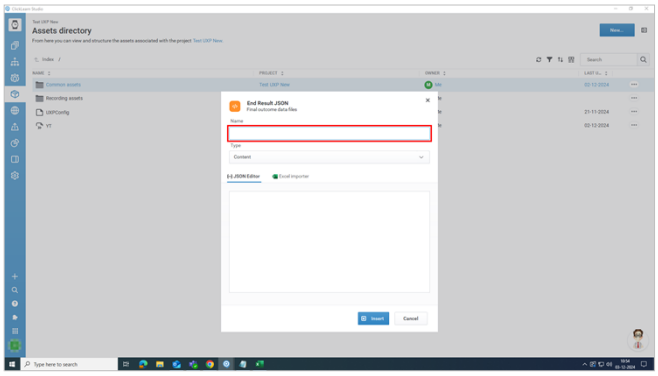
Click on the button **New**.



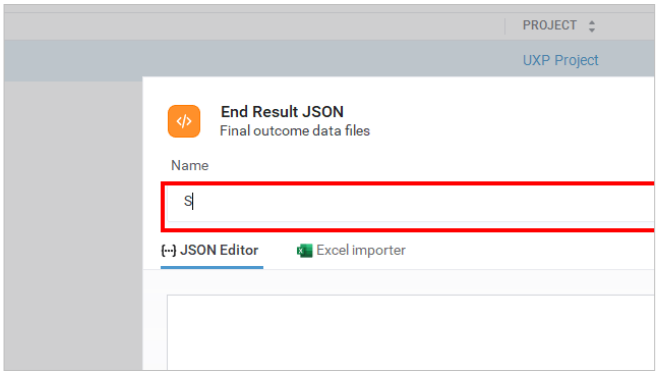
Click on the menu item **New End JSON.**



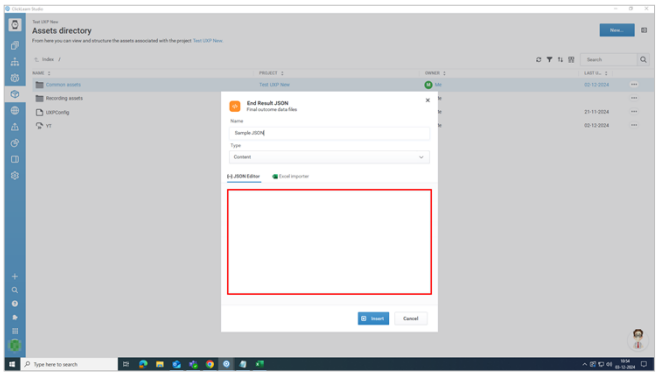
Click on the textbox **Asset Name.**



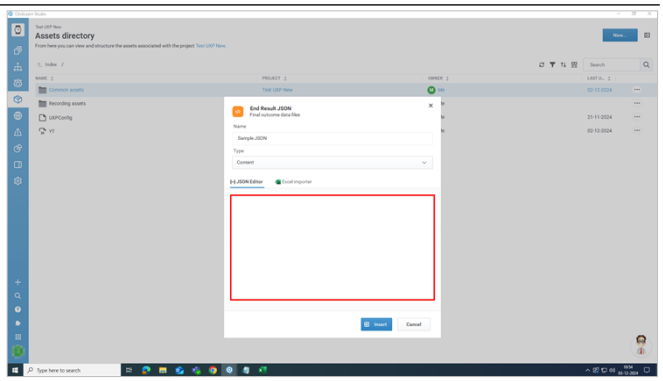
Enter **Asset Name**.



Click on the text editor **Content Json.**

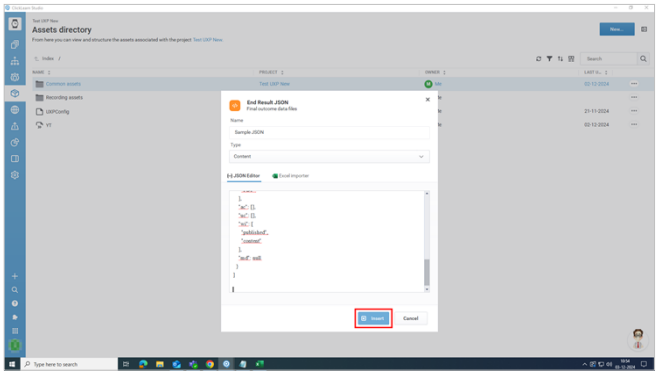


Press **CTRL+v**.



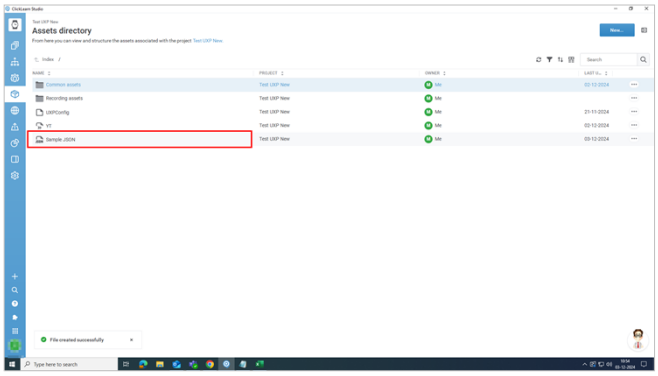
Content JSON: We have now inserted the code formatted in JSON into the editor.

Click on the button **Insert**.



Click on the gridview cell **NAME** with data **Sample JSON**

We have now added the JSON file to Assets.

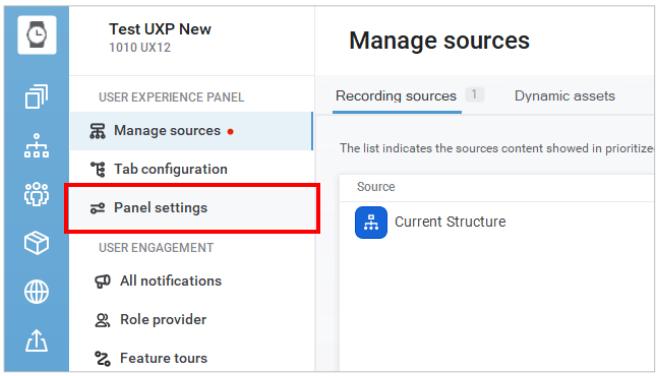


17.9.Configure Panel Settings

Point the UXP panel at exactly the apps where it should appear, so guidance shows up only in the applications you specify, across as many as you need, without it surfacing where it doesn't belong.

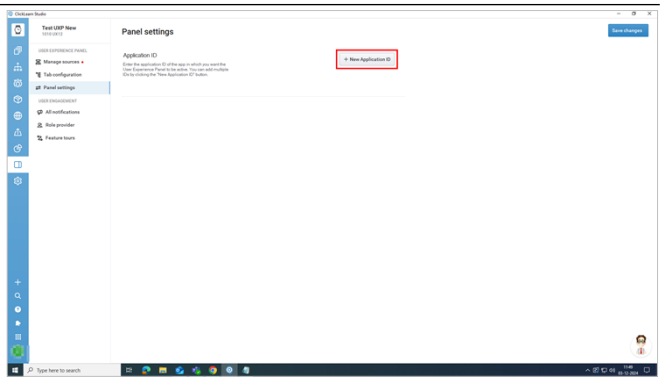
17.9.1. Panel Settings

Click on the button **Panel settings.**

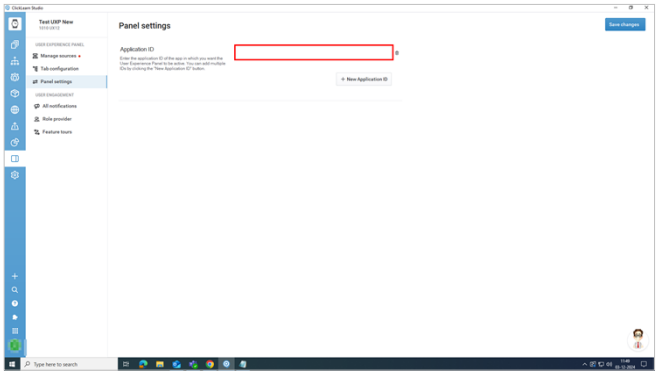


Application ID: Here, you need to enter the application ID of the app where you want the User Experience Panel to be active. It is the URL of the application.

Click on the button **New Application ID**.

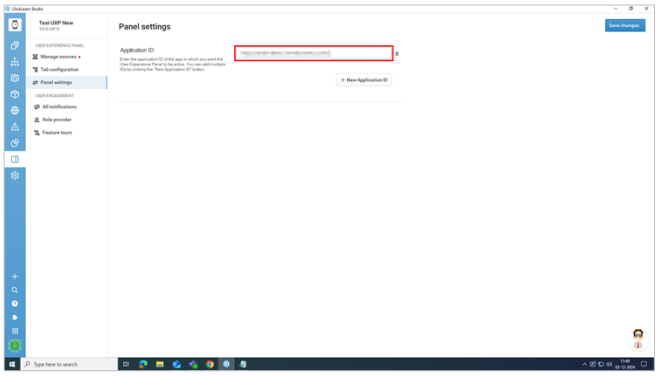


Click on the textbox **Text.**

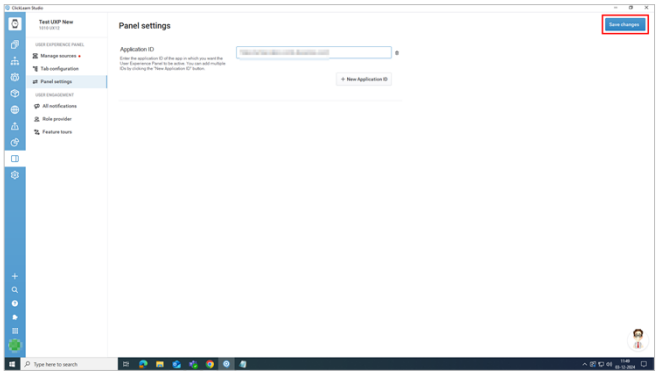


Enter the URL or the application ID.

NOTE: You can add multiple IDs by clicking the **New Application ID** button.



Click on the button **Save changes.**

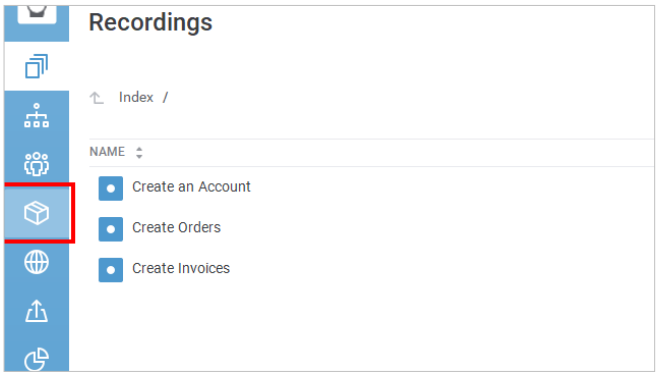


17.10. Add Context and Metadata to Dynamic Assets

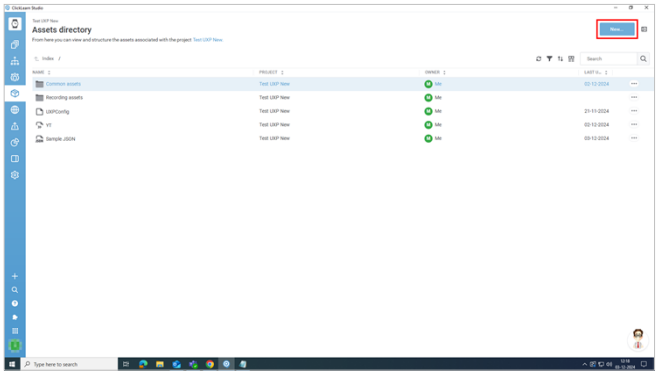
Tag your dynamic assets with metadata and custom contexts, so external content surfaces under the right filters and on the exact pages you choose, without it appearing where users don't need it.

17.10.1. Introduction

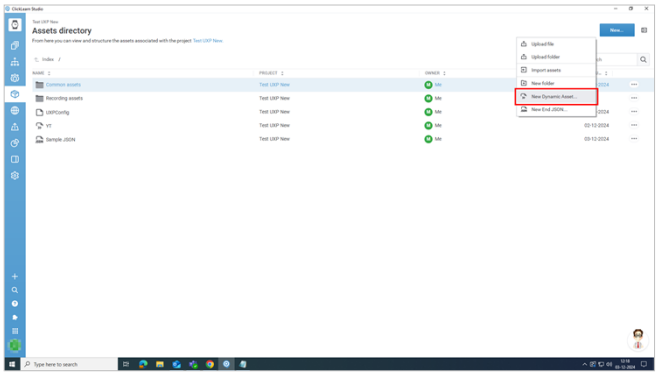
Click on the **Assets** button.



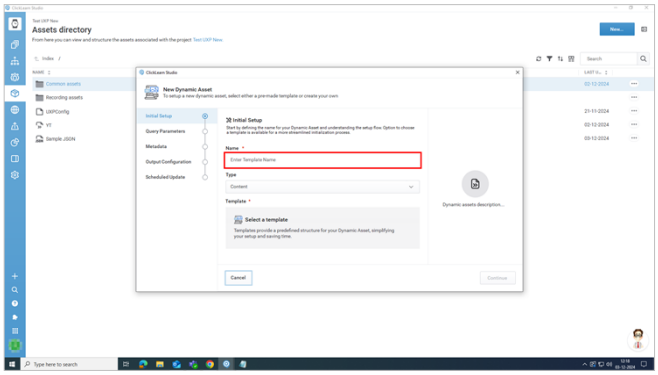
Click on the button **New.**



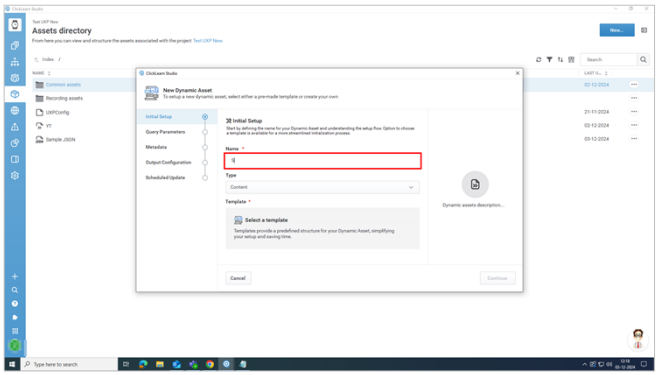
Click on the menu item **New Dynamic Asset.**



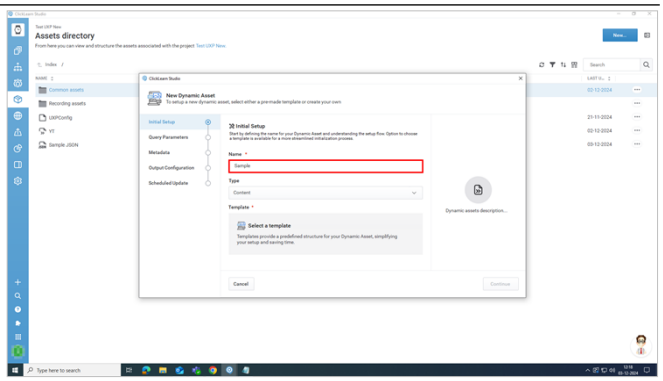
Click on the textbox **Dynamic Asset Name.**



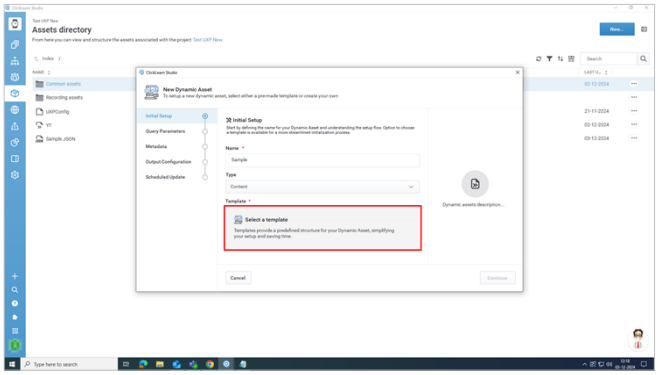
Enter **Dynamic Asset Name**.



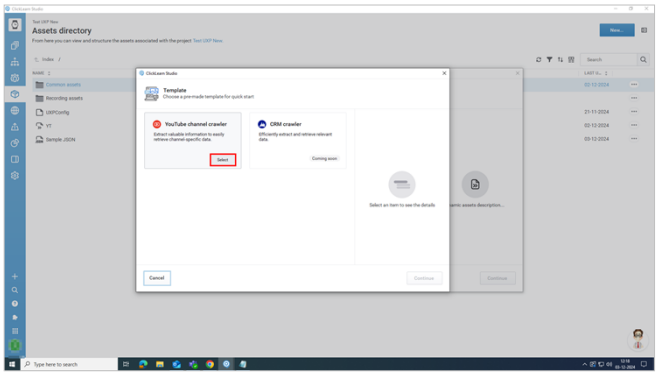
Click on the textbox **Dynamic Asset Name**.



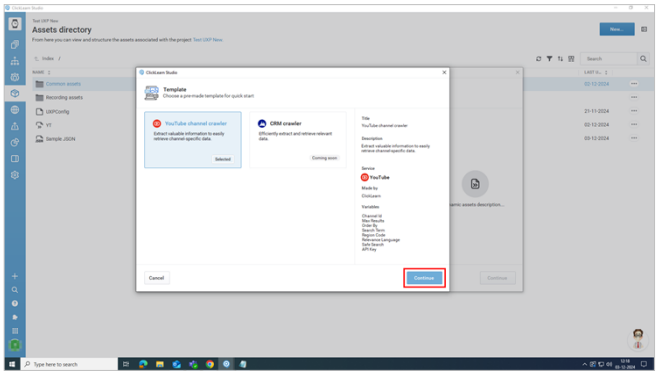
Click on the panel.



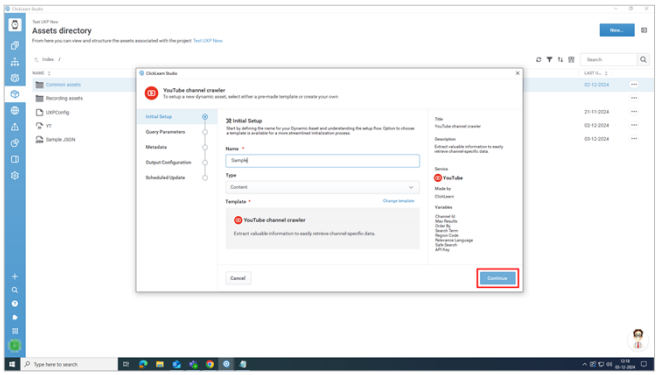
Click on the icon **Select.**



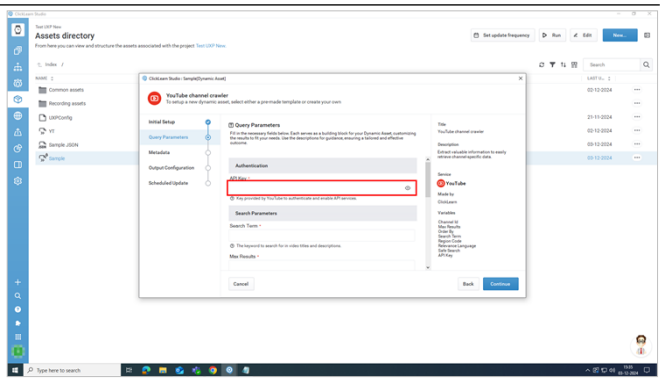
Click on the button **Continue.**



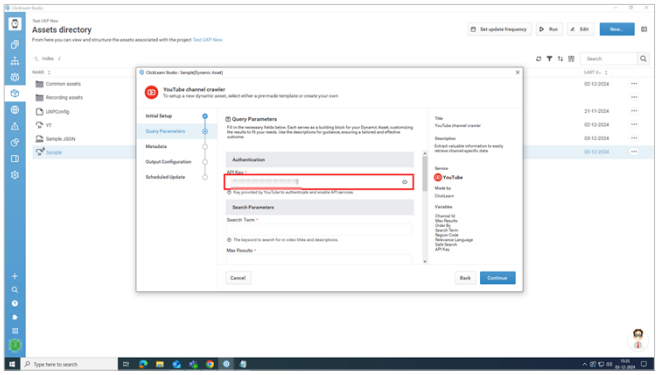
Click on the button **Continue.**



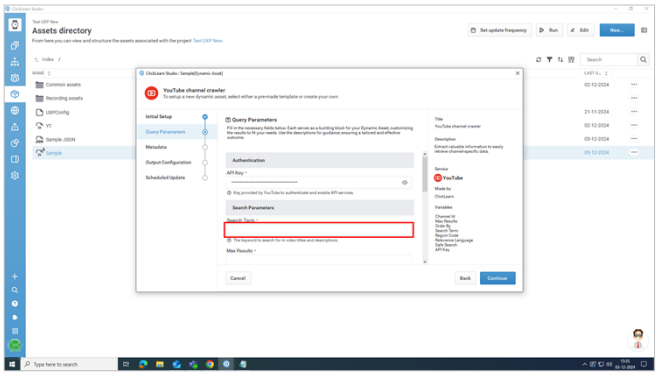
Click on the textbox **Data** and enter the API key.



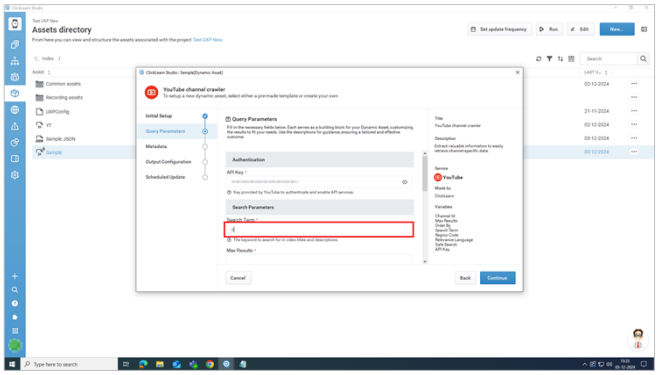
Press **CTRL+v**.



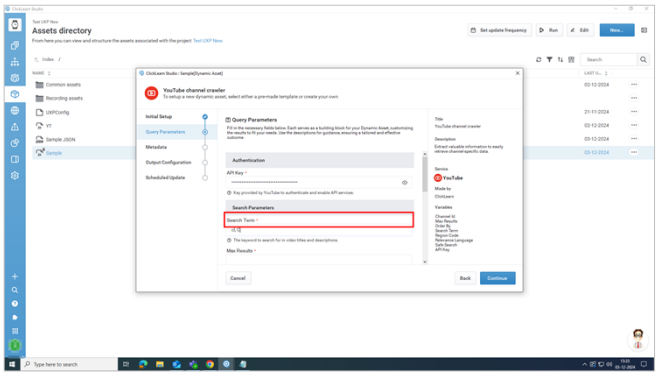
Click on the textbox **Data.**



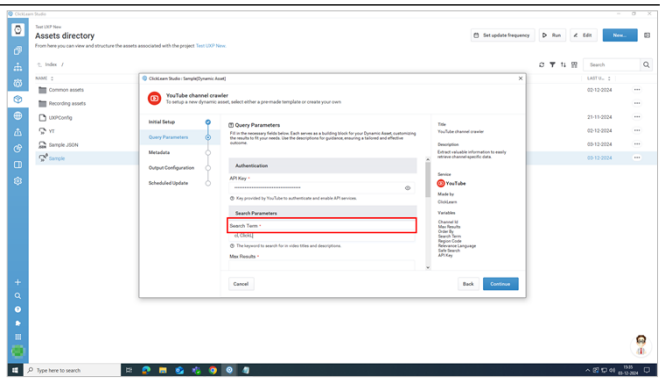
Enter **Data**.



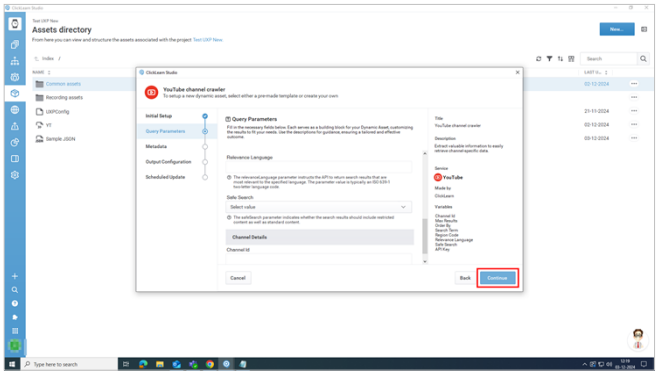
Click on the textbox **Data.**



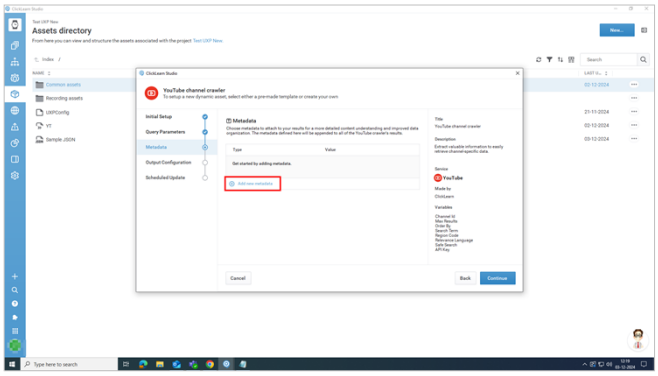
Enter **Data**.



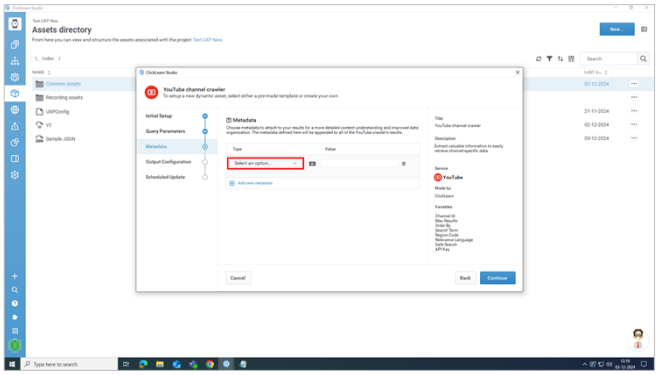
Click on the button **Continue.**



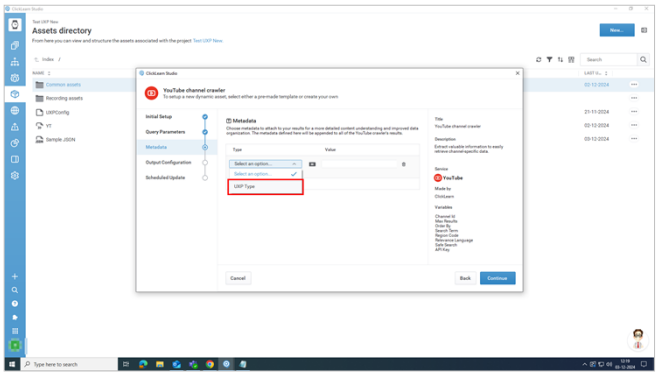
Click on the button **Add new metadata.**



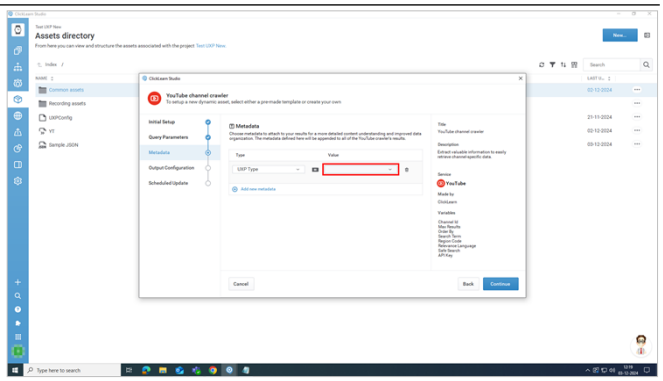
Click on the dropdown **Metadata.**



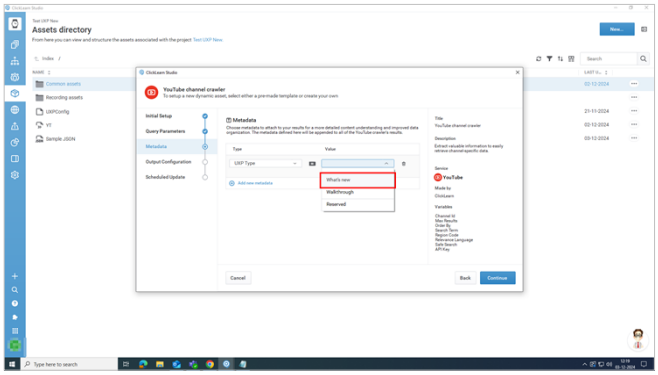
Click on the dropdown item **UXP Type**. Choose an option from the dropdown menu that aligns with your project requirements.



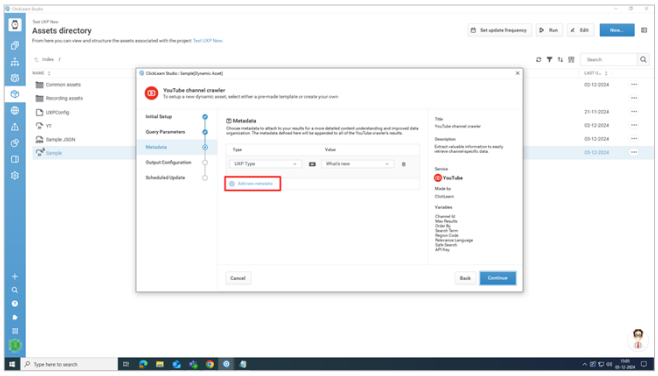
Click on the dropdown **metadata Value.**



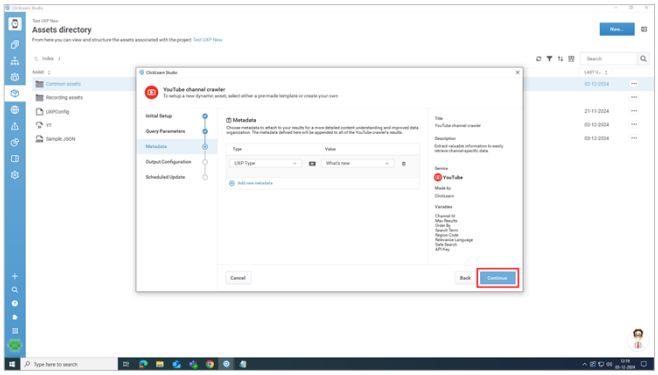
Click on the dropdown item **What's new.**



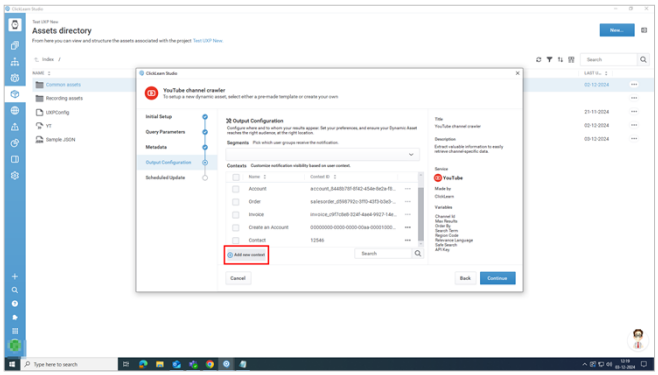
Click on the button **Add new metadata** to add multiple metadata.



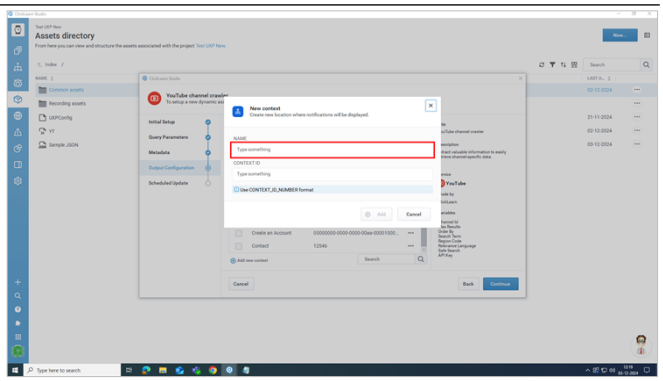
Click on the button **Continue.**



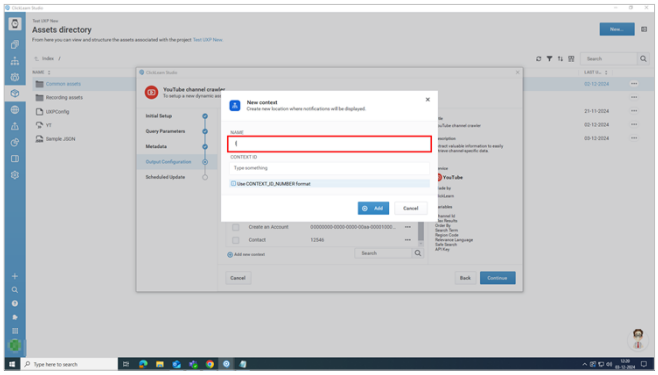
Click on the icon **Add new context**. This helps you to create a new location for the display of notifications.



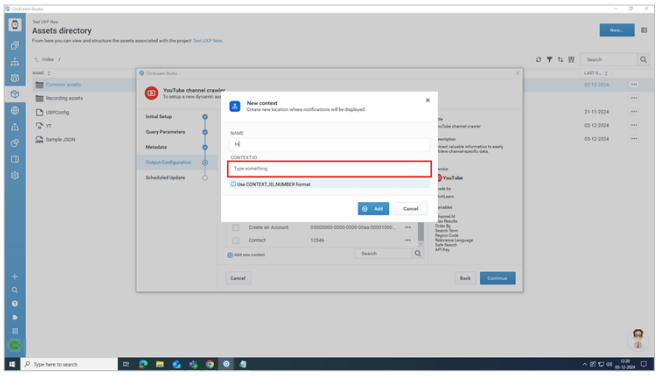
Click on the textbox **Name.**



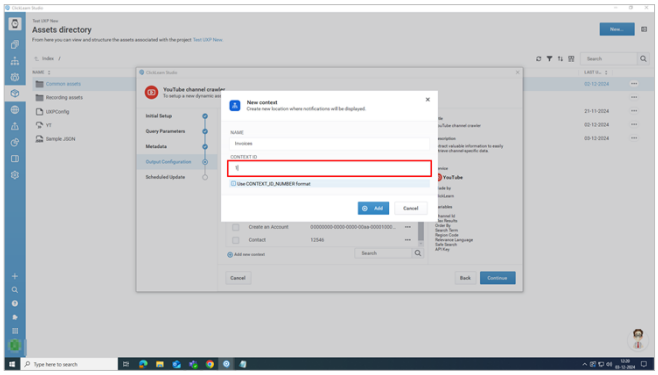
Enter **Name**.



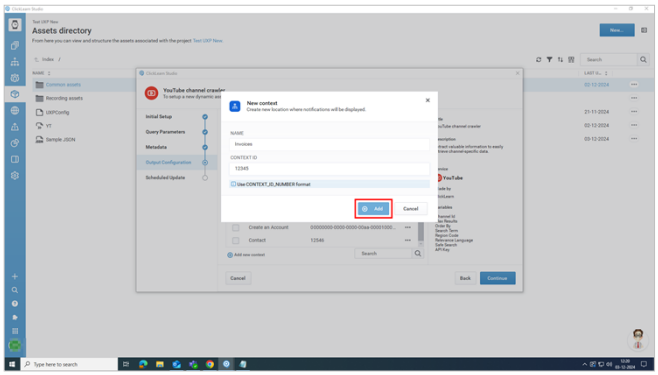
Click on the textbox **Context.**



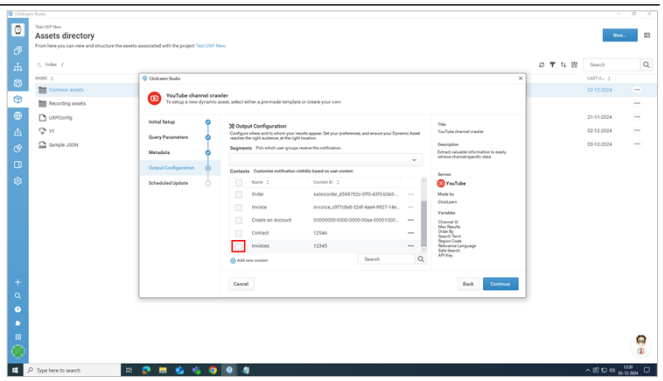
Enter **Context**.



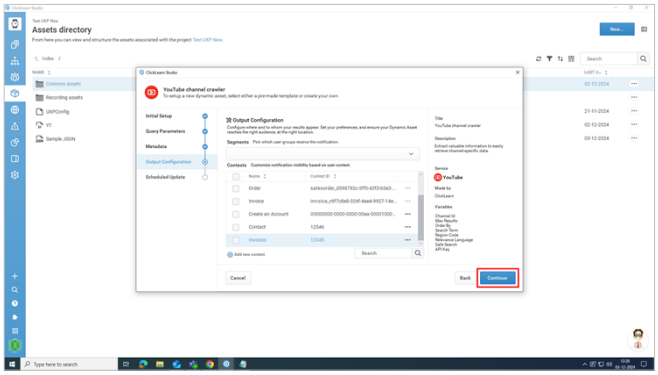
Click on the button **Add.**



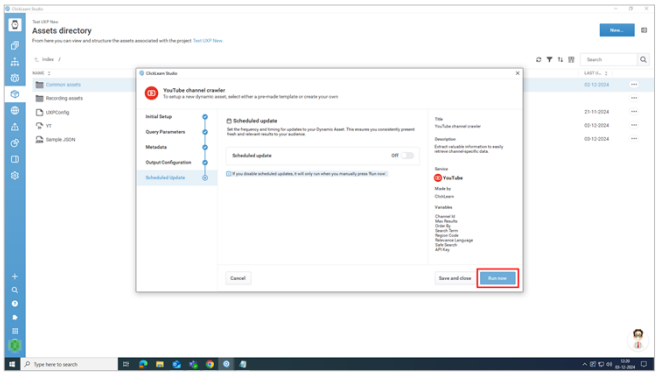
Click on the checkbox of the grid cell: **Select**.



Click on the button **Continue.**

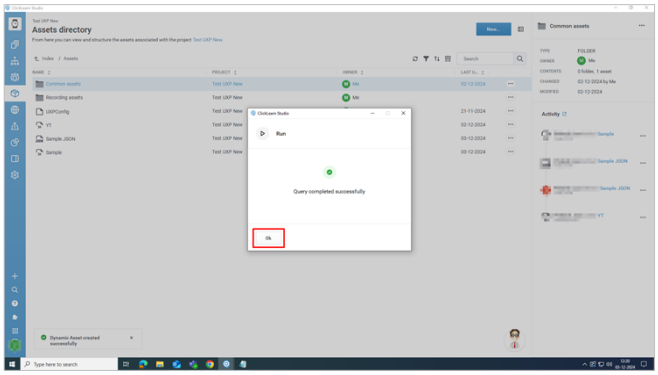


Click on the button **Run now.**



Once the query is complete, it displays a message confirming its completion.

Click on the button **Ok.**



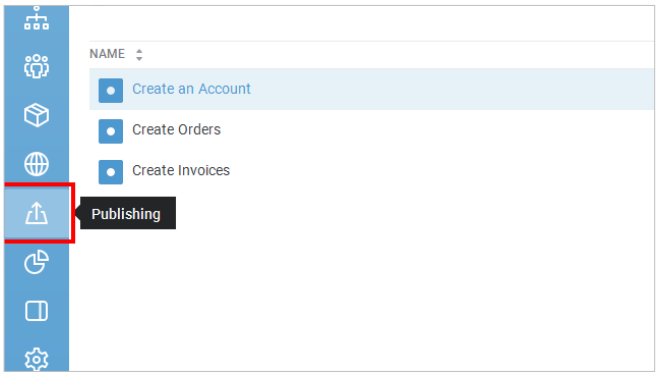
17.11. Produce and Publish UXP Project

Produce and publish in one guided flow, so your UXP goes live in the exact applications you authorize and every later change reaches users the moment you republish.

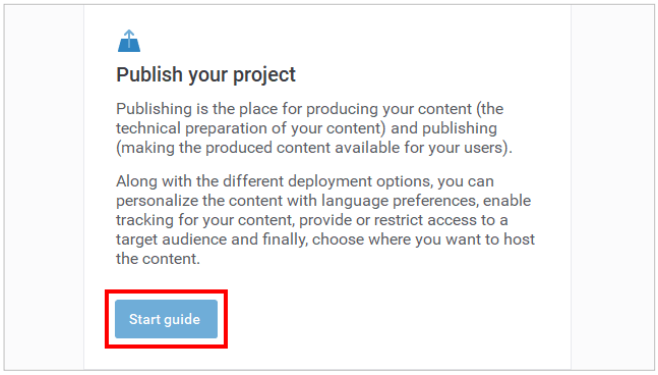
17.11.1. Introduction

You must produce and publish the project to reflect the UXP in your desired application.

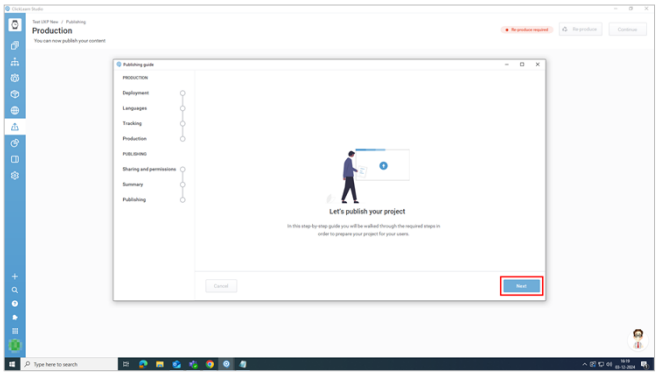
Click on the button **Publishing**.



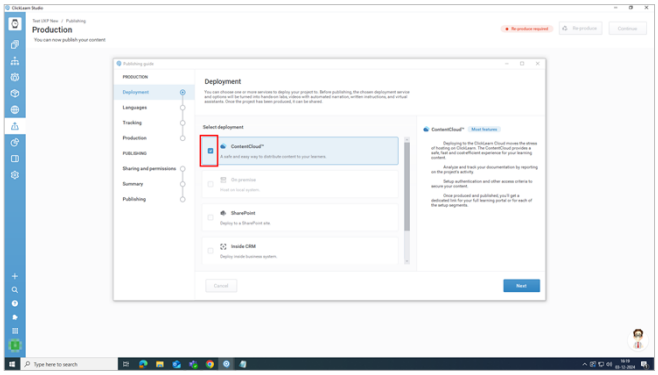
Click on the **Start guide** button.



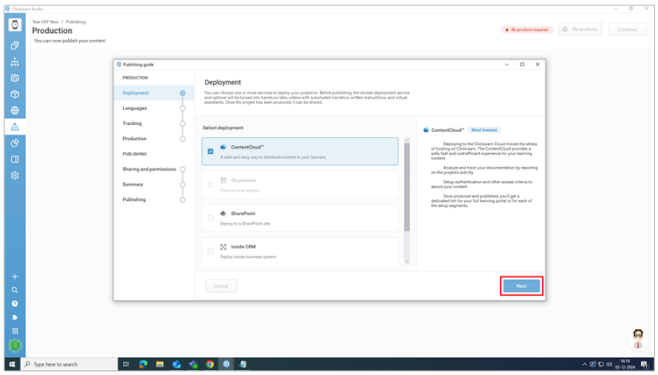
Click on the button **Next.**



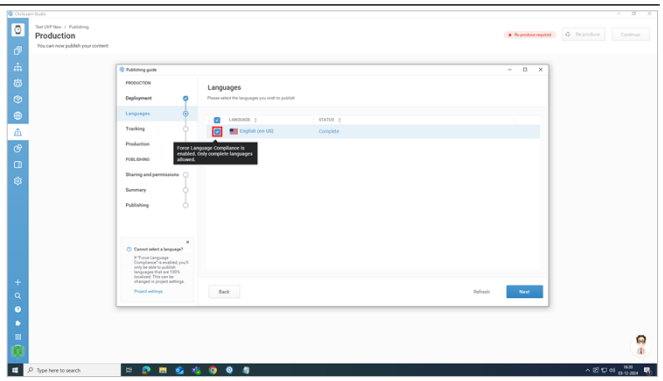
For deployment, mark the check box that best suits your needs. Select the **Content Cloud** option by clicking on the corresponding check box.



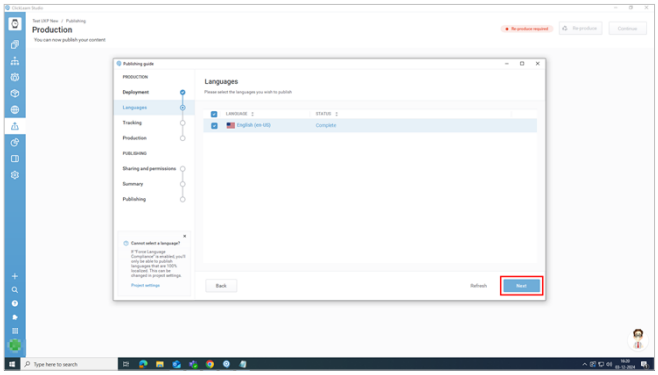
Click on the button **Next.**



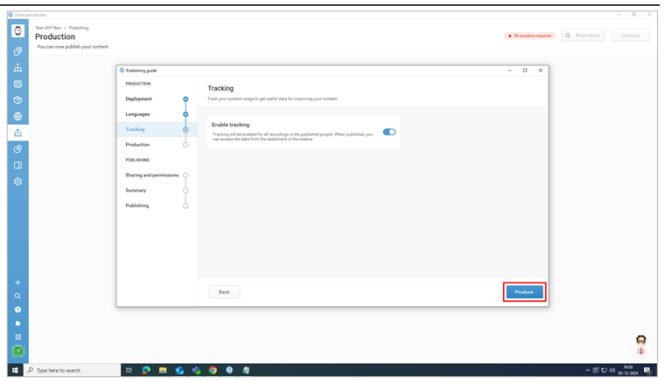
Click on the checkbox of the **For Language** selection.



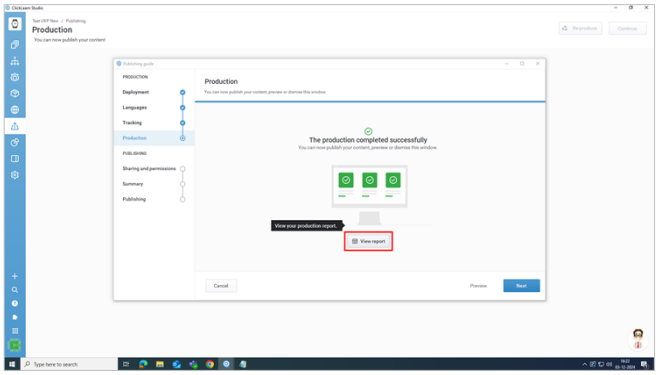
Click on the button **Next.**



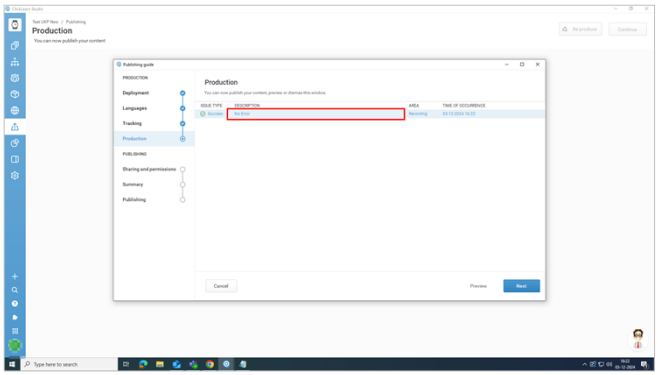
Click on the button **Produce.**



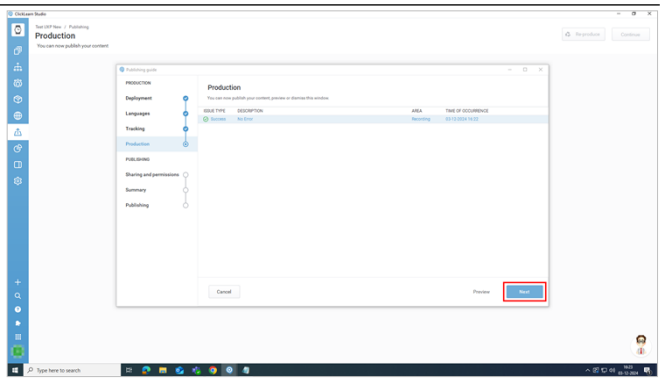
View report: Click on the button view report to see if there are any errors.



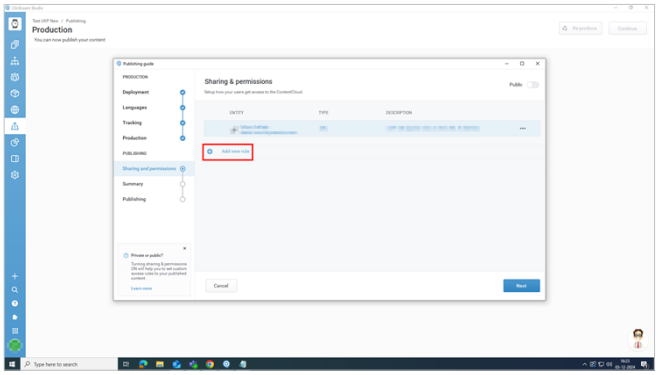
If errors are detected, the error description is displayed. If the system detects no errors, it will display "**No Error.**"



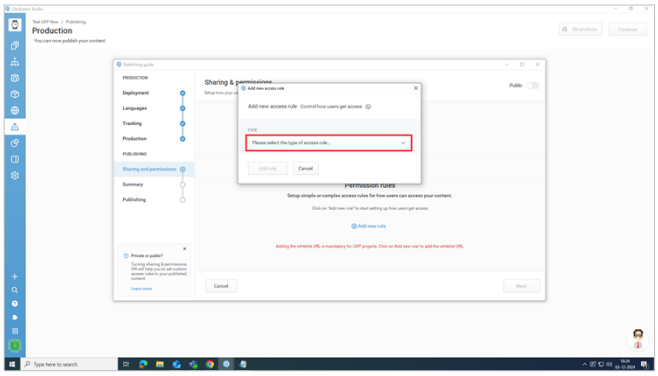
Click on the button **Next.**



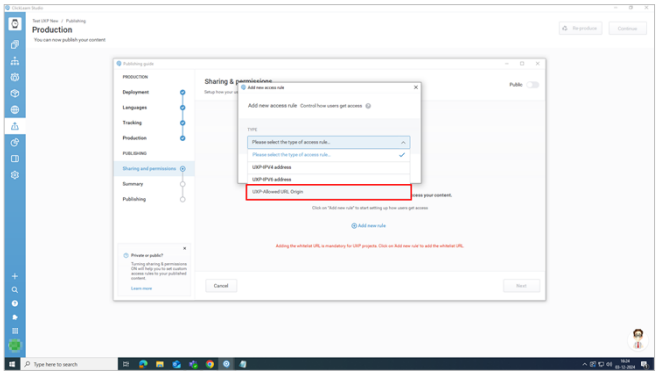
In the Sharing and Permissions section, click the **Add new rule** button.



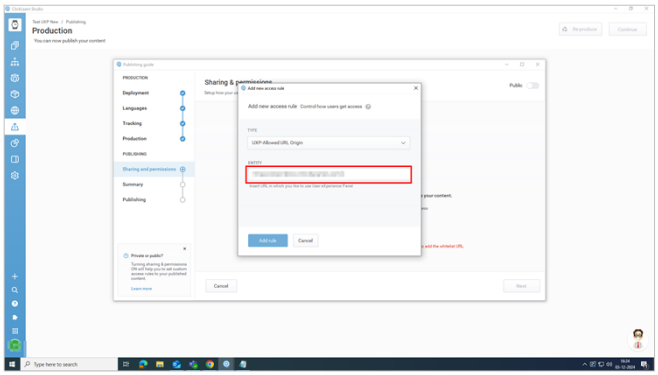
Click on the dropdown **Access Type.**



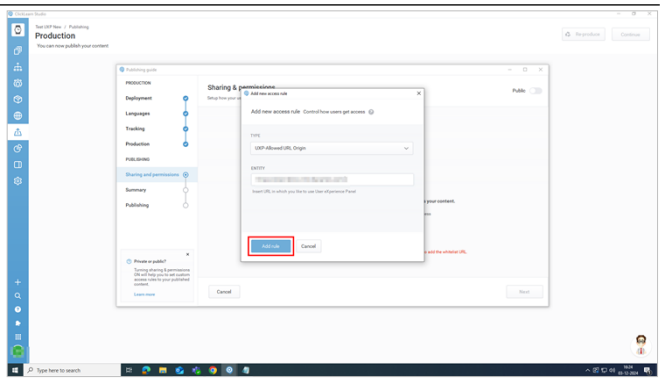
Click on the dropdown item **UXP-Allowed URL Origin.**



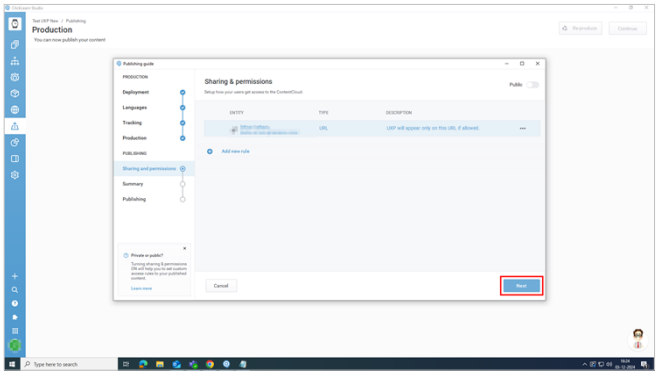
Click on the textbox **URLOrigin**. You must enter the application **URL** where you wish to see the UXP.



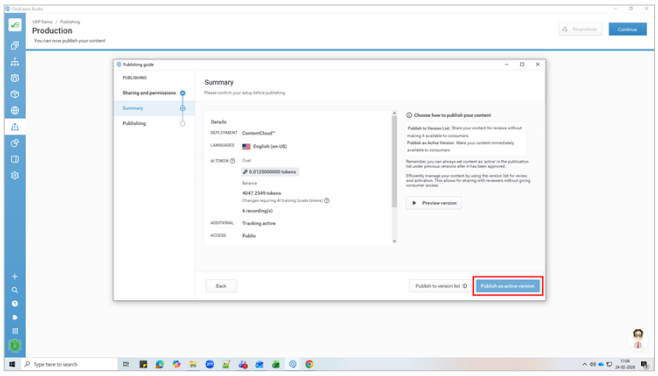
Click on the button **Add rule.**



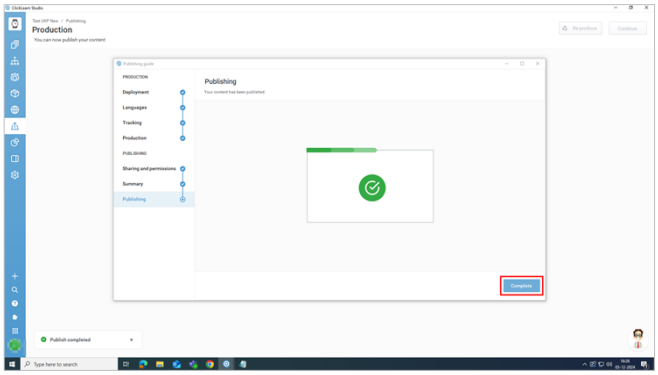
Click on the button **Next**



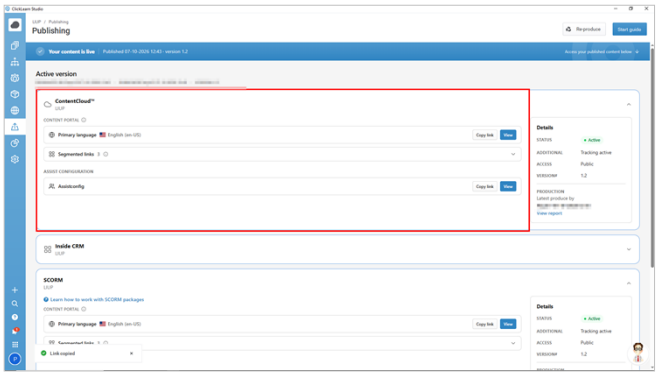
Click on the button **Publish as active version**



Click on the button **Complete.**



NOTE: Every time you make changes to your project, you must produce and publish it again.

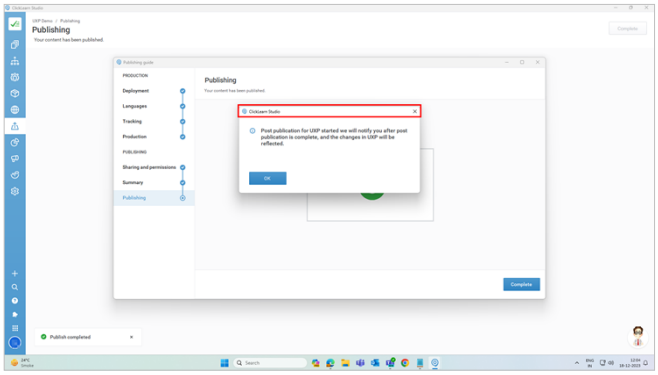


17.12. Publishing Experience

Get a clear signal when post-publication finishes, so you know exactly when your changes are live in the UXP panel and ready to check, instead of guessing whether the update has gone through.

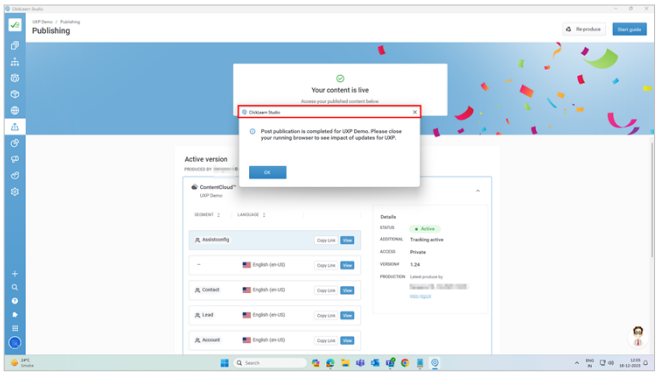
Once you produce and publish the project, a popup dialog box shows up that says Post-publication for UXP has started, and ClickLearn Attain will notify you once it is complete.

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.

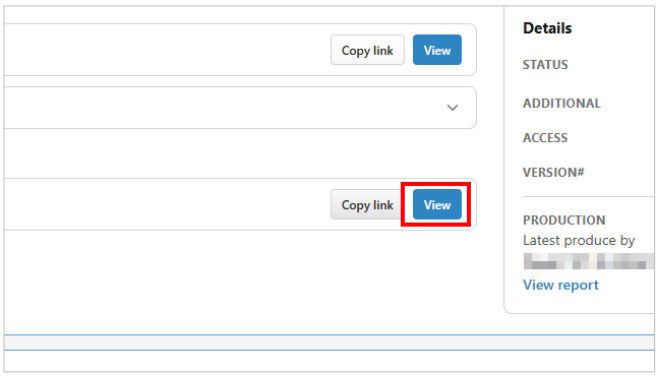


17.13. Configure Assist for UXP

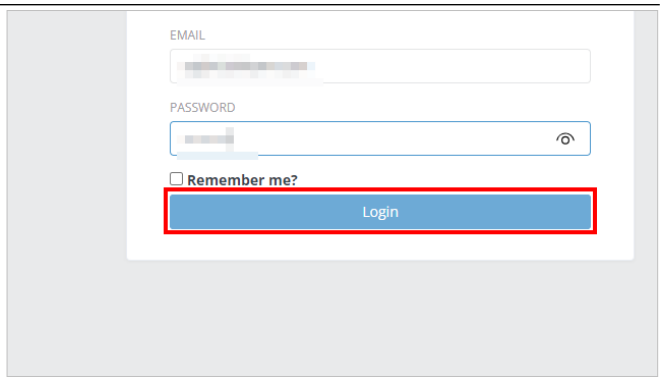
Point Assist at the exact URL where your panel should run, so the UXP loads correctly for your users even when the origin wasn't set during publishing.

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.

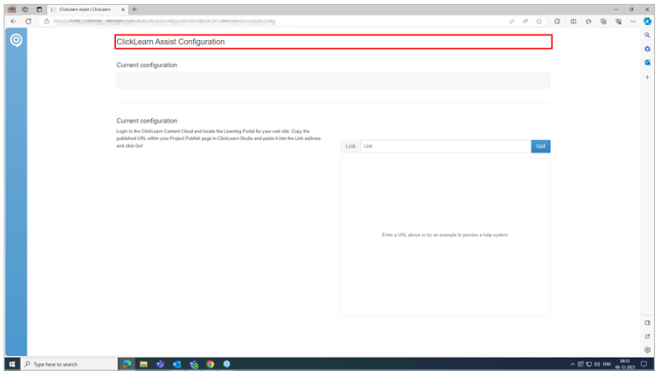
Click on the button **View.**



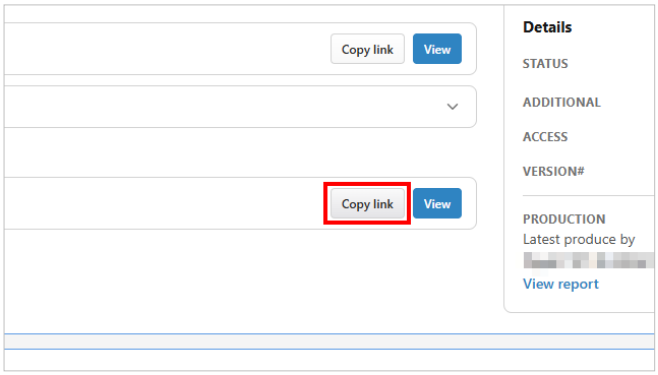
You must log in with your credentials and click the **Login button**.



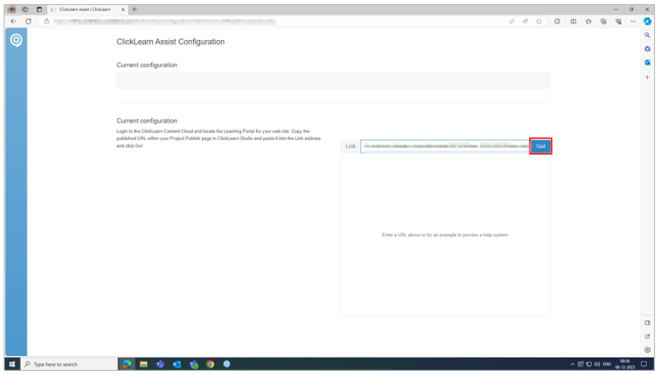
To make sure the UXP works appropriately, we need to configure the assist. This screen indicates the **ClickLearn Assist Configuration** is missing.



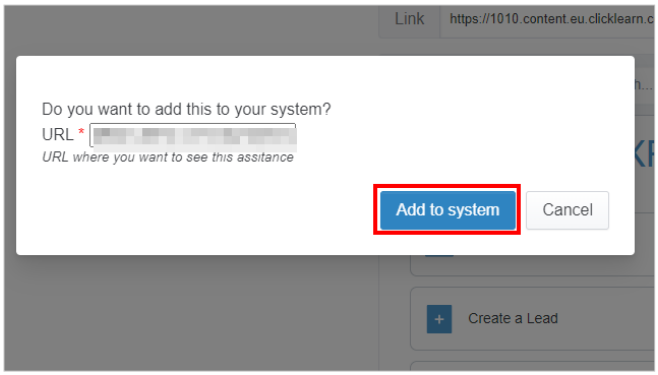
Click on the button **Copy Link** in publishing and go back to the assist configuration.



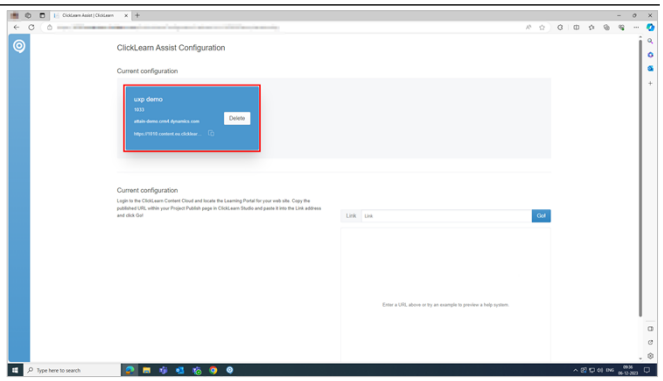
Click on the input field Link, enter the URL, and click on the button **Go!**



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.



17.14. Connect ClickLearn Alfred (Teams Chatbot)

Bring your AI assistant into Teams channels, chats, and meetings, so users get answers from your content in the tool they already collaborate in every day.

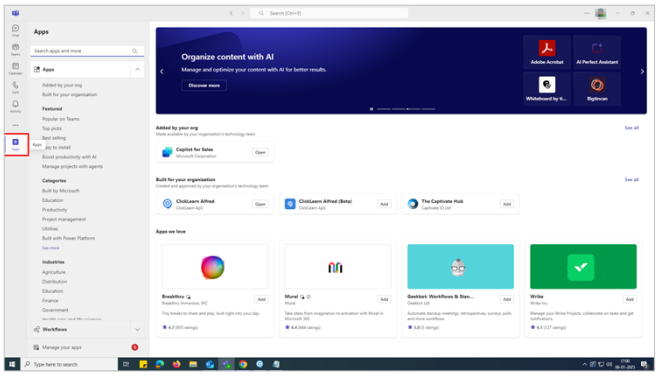
17.14.1. Introduction

To make ClickLearn Alfred work properly, you need to set up the UXP configuration and connect it with the AI source in your project. Additionally, you should complete a few chat-related settings in your team's environment.

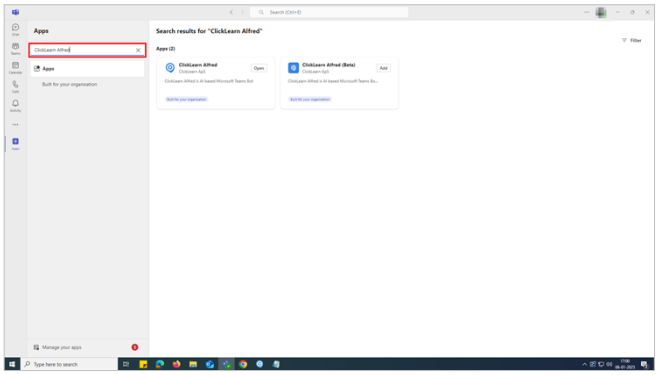
Note: The bot can only be configured for a channel or group chat; it is currently not available for individual chats.

17.14.1.1. Find the Application

Click on the button **Apps**.



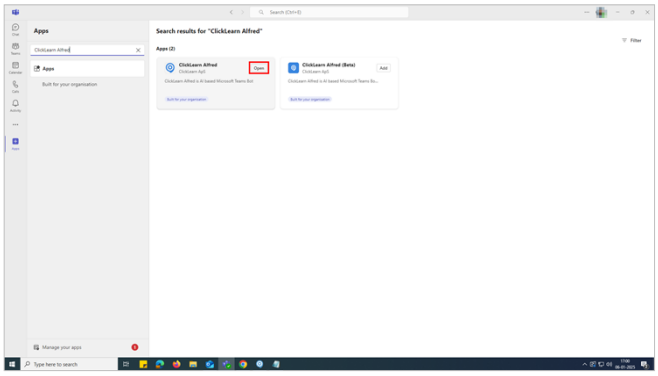
Click on the input field **Store Search** and enter ClickLearn Alfred.



17.14.1.2. ClickLearn Alfred

Click on the button **ClickLearn Alfred**.
NOTE: If you cannot locate the bot by either method, it's recommended that you terminate Teams via the Task Manager, relaunch the application, and attempt the search once more.

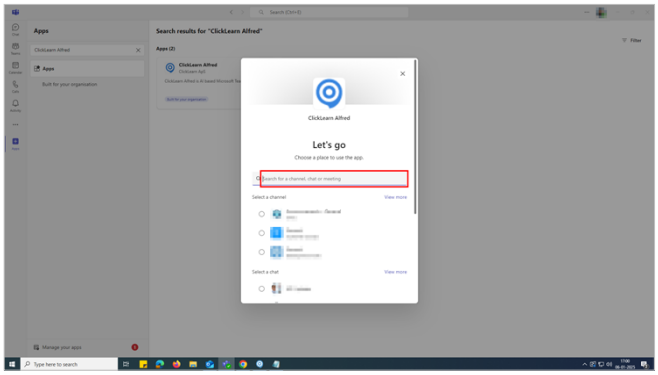
ClickLearn Alfred currently targets only two regions: the EU and the US. Before adding the bot, it is recommended to create a team channel.



17.14.1.3. How to Configure Chatbot in Teams

To chat with **ClickLearn Alfred**, follow these steps after installing it on your Teams:

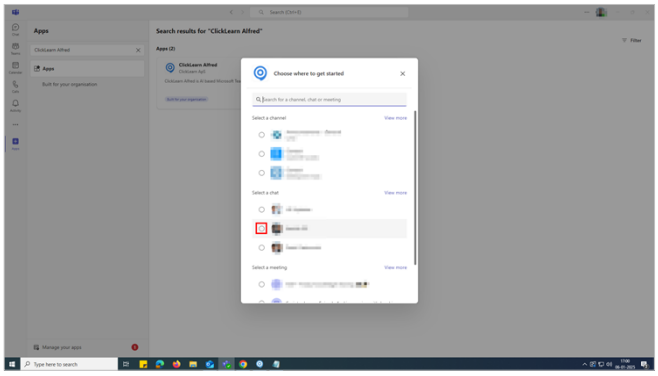
Click on the input field **Search** and type the channel name, chat or meetings.



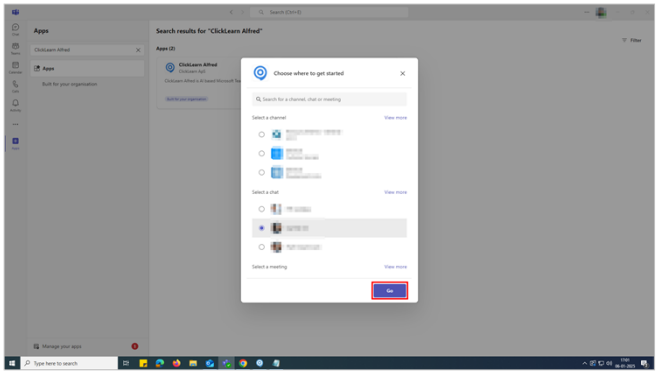
17.14.1.4. Add Bot to Channels, Chats and Meetings

Select the **channels, chats, and meetings** you wish to add ClickLearn Alfred.

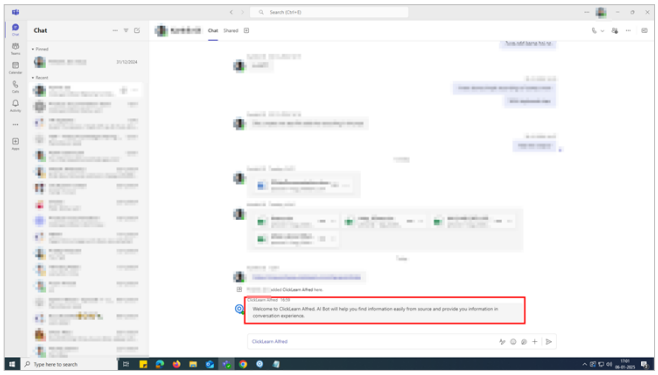
- **Add to Channels**: You can include a bot in the channel, enabling it to participate in channel conversations.
- **Add to Group Chats**: You can incorporate the bot into group discussions or direct one-on-one chats.
- **Add to Meetings**: You can include the bot in meeting sessions to enhance interactions.



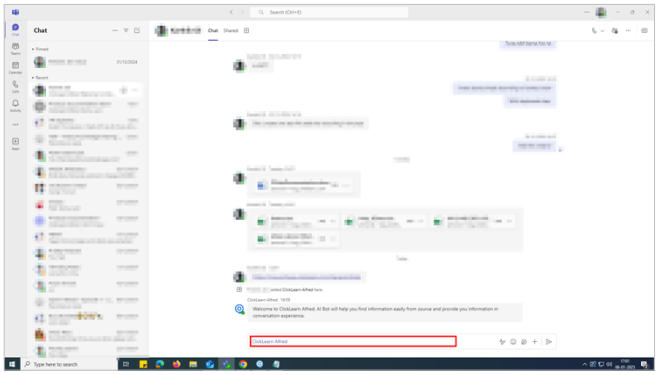
Click on the button **Go**.



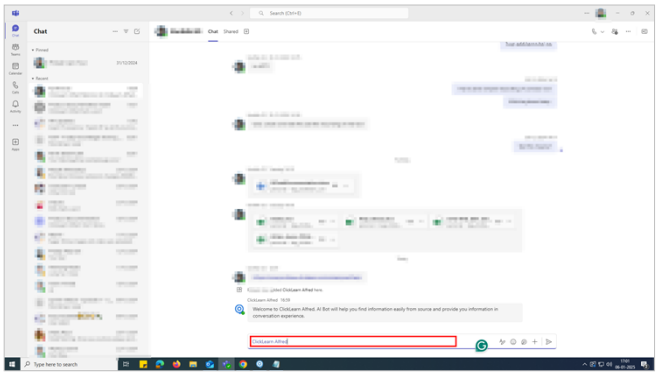
When the bot is added to chats, it will send an introduction message that looks like this.



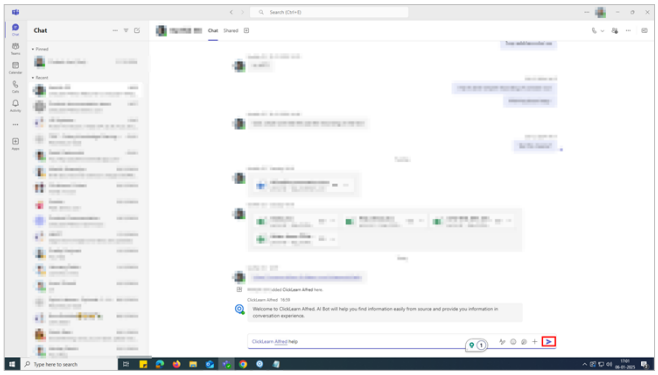
Click on the **textbox**.



Enter the text **help**.

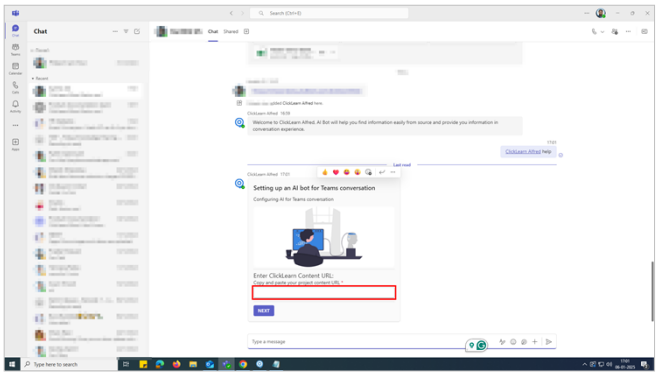


Click on the button **post**.

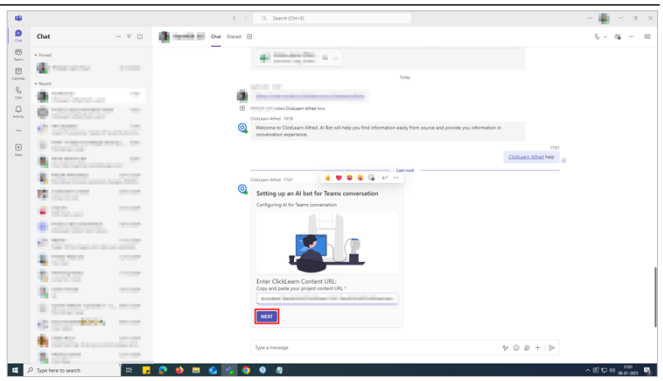


Once you post, you will receive an Adaptive Card.

Click on the input field **Copy** and paste your published project content URL.

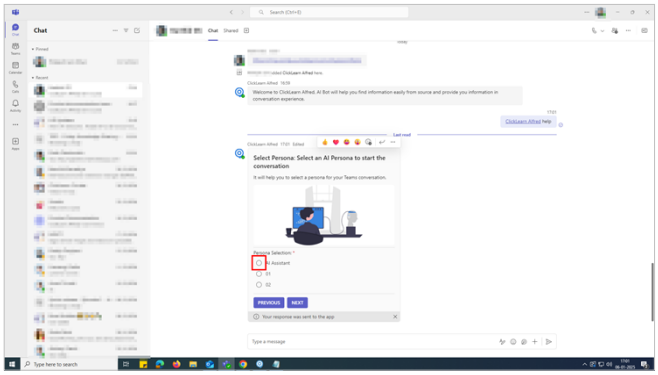


Click on the button **NEXT**.

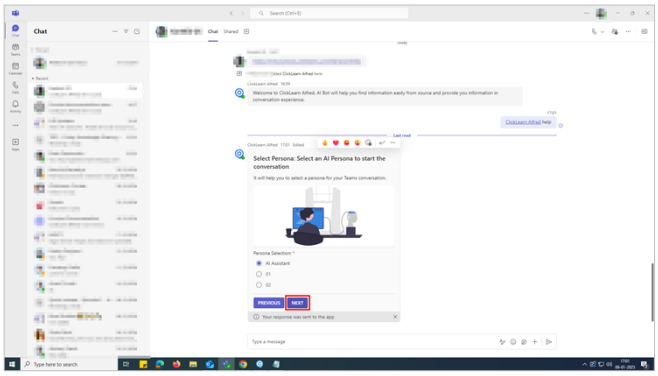


Once you enter the published content URL and hit the button next, you will be asked to select a Persona.

Click on the button **AI Assistant**.

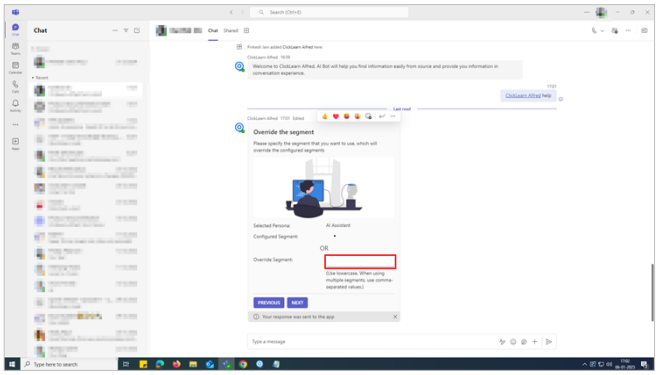


Choose the appropriate Persona and click **Next**.

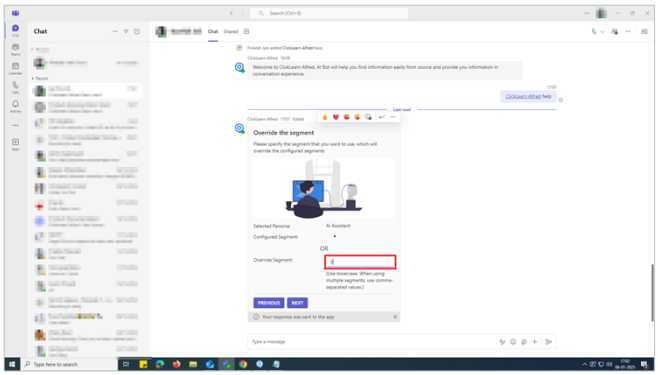


The following card will display the selected Persona along with the mapped Segment.

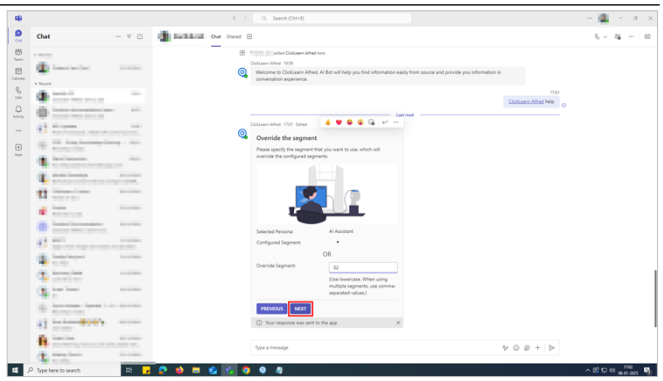
If you wish to override the default segment, enter the desired segment name in the Override Segment field.



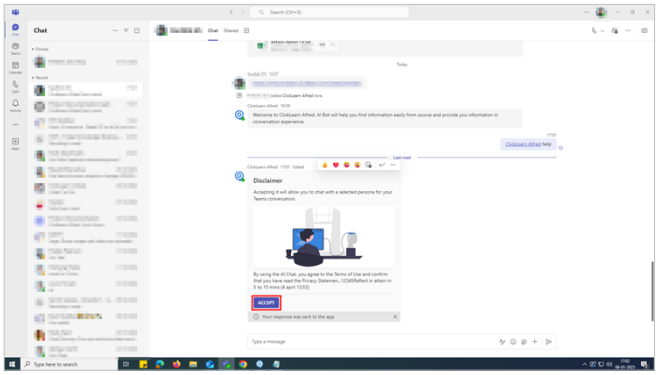
Enter the text **02**.



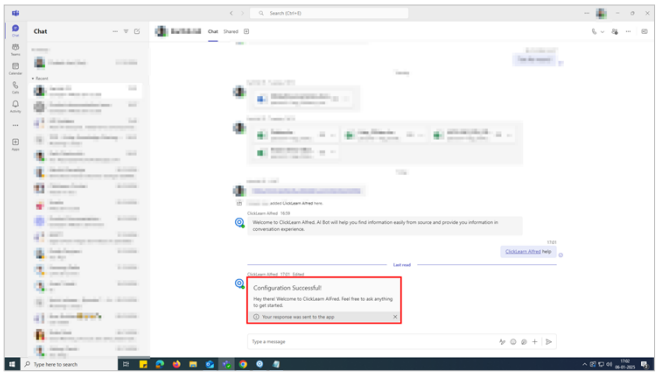
Click on the button **NEXT**.



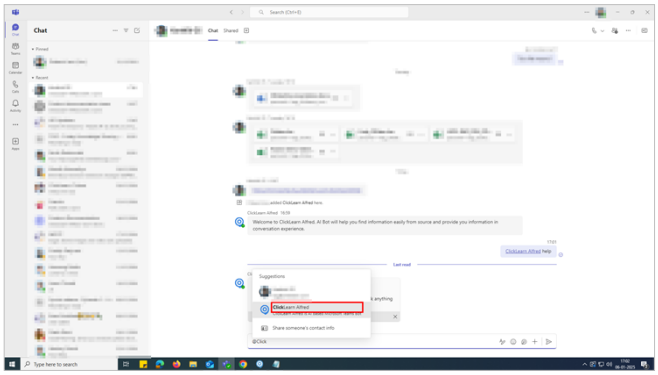
Click on **Accept** to agree to the terms and conditions.



Congratulations! Your Chatbot is now successfully configured and ready to answer your questions.



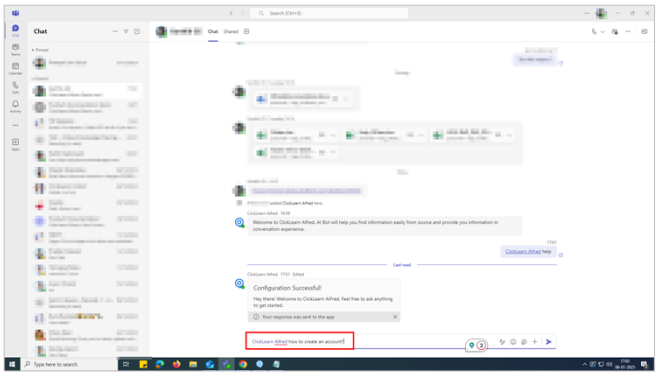
Click on the **textbox** and type **@ClickLearnAlfred**.



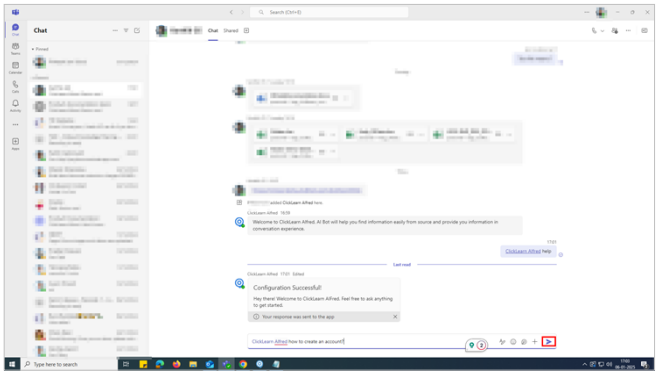
Click on the **textbox** and enter the text **how to create an account?**

When you ask the questions to bot, it automatically tries to fetch the configuration for that channel, chat and meeting.

Note: If the project configurations are unmet, you must re-configure it first. It also displays a configuration card that allows you to re-configure and save the configuration.



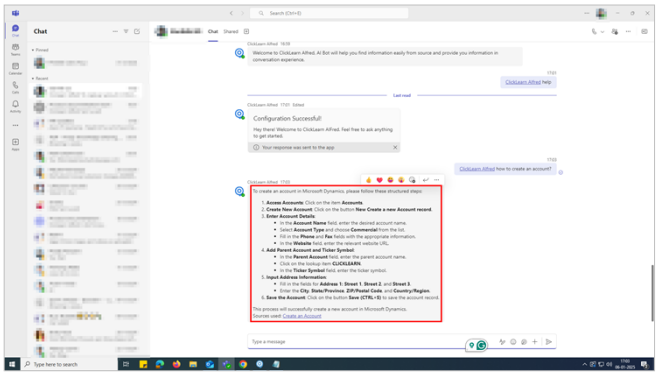
Click on the button **post**.



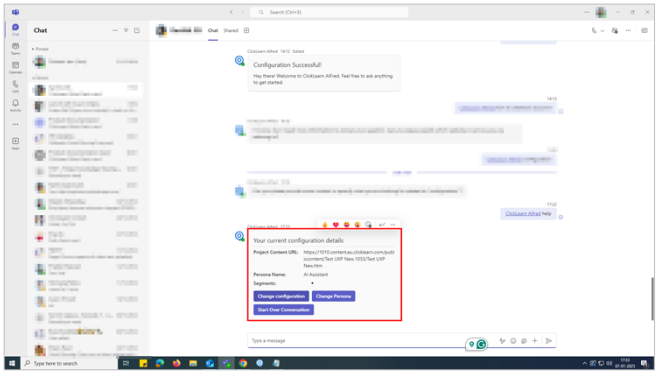
If it matches the current project configuration, this is how the response will appear. This is what an AI response looks like when you ask a question.

For more information, you can visit the links provided.

The same way, you can add a bot to **group chats** and **meetings.** If the project configurations are unmet, you must re-configure them first. It also displays a configuration card that allows you to re-configure and save the configuration.



17.14.1.5. Option to See and Edit Bot Configuration



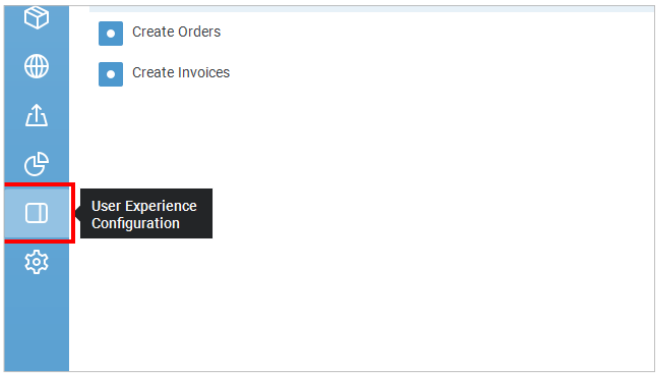
- **Change Configuration**: To reconfigure the current configuration, select the change configuration. This displays an adaptive card, where you must fill in all the details.
- **Change Persona**: To change your persona, select the command change persona and select the available persona.
- **Start Over Conversation**: When you select Start Over Conversation, a message your history is removed for this conversation will appear.

17.15. Adding Notifications

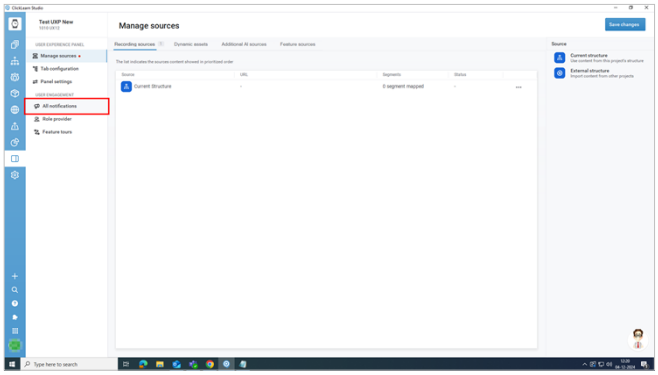
Target the right users with the right message at the right moment, so announcements reach only the segments you choose and run exactly as long as you schedule them.

17.15.1. Adding Notifications

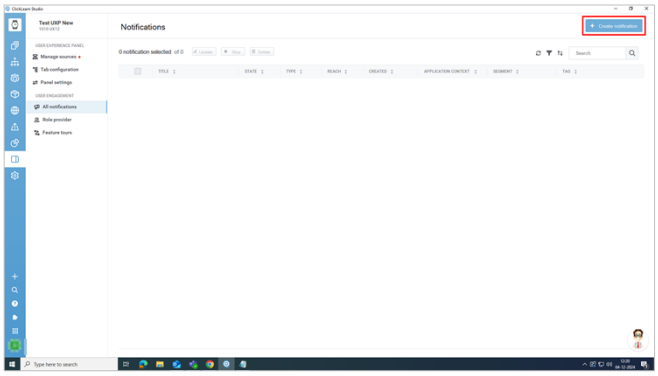
Click on the button **User Experience Configuration.**



Click on the button **All notifications.**



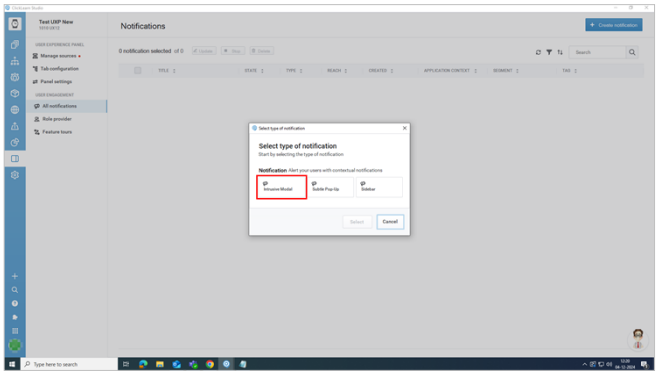
Click on the button **Create notification.**



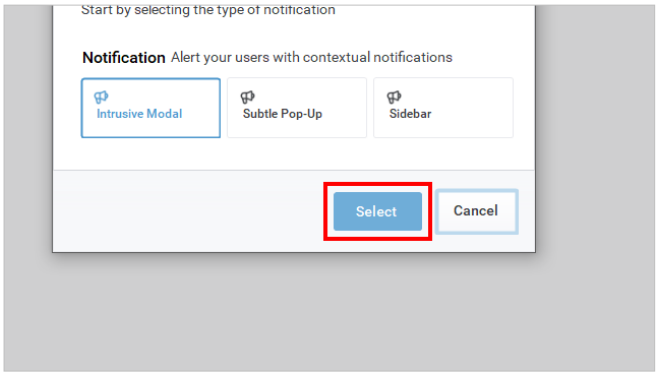
There are three different types of notifications.

- **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.

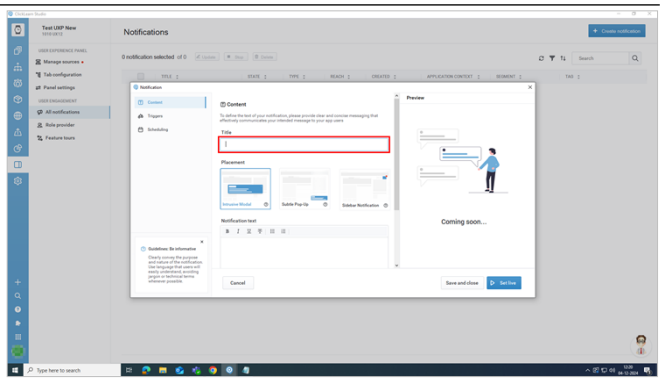
Click on the label **Intrusive Modal**.



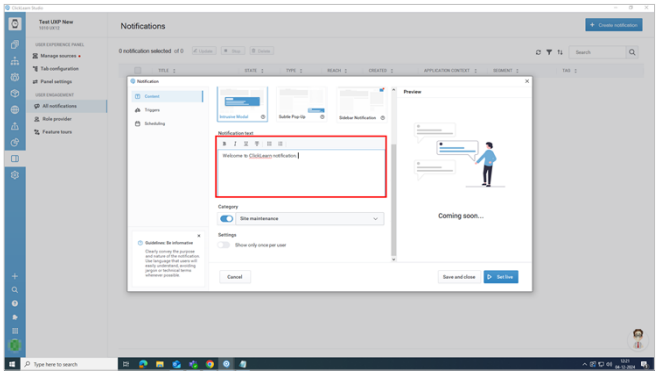
Click on the button **Select.**



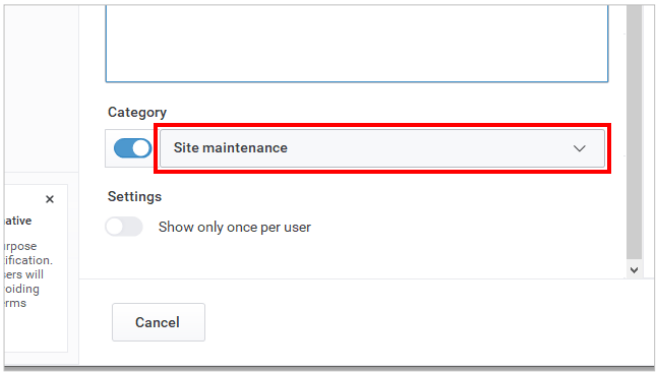
Click on the textbox **Title** and provide a name for the notification.



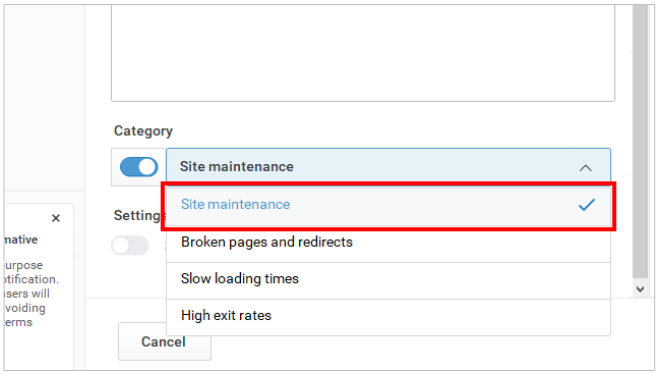
Notification Text: To provide a notification text, click on the text editor Content and type the notification text.



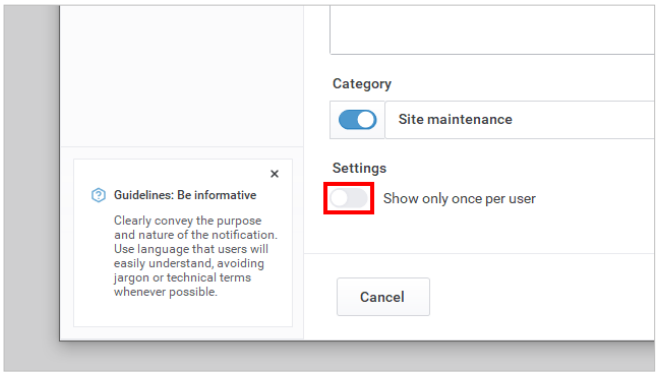
Click on the dropdown **Category.**



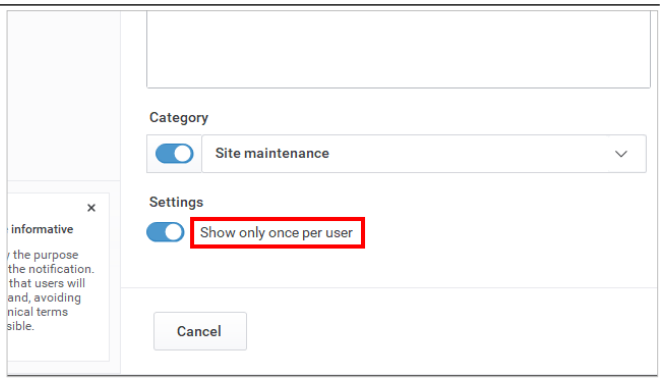
Select **Site Maintenance**.



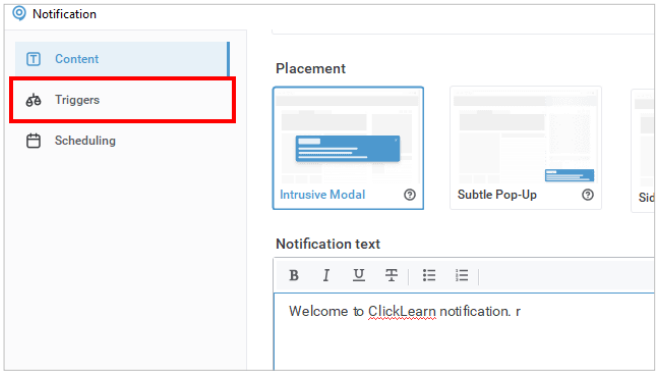
Click on the toggle switch **Settings.**



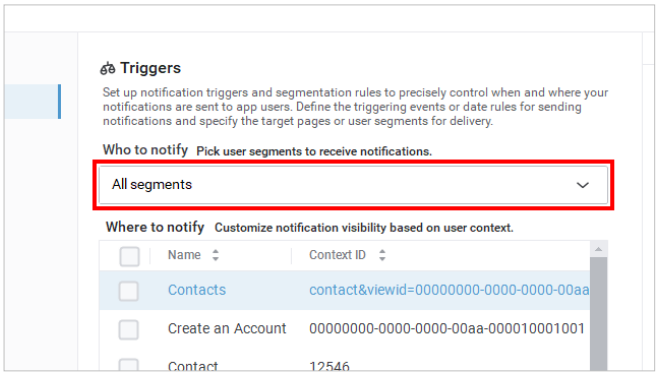
Click on the label **Show only once per user.**



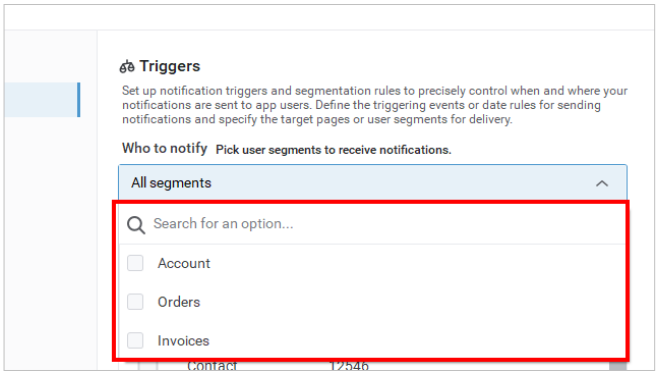
Click on the button **Triggers.**



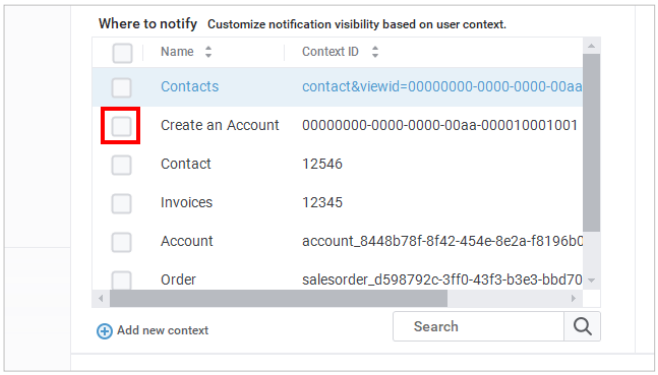
Click on the dropdown **Segments.**



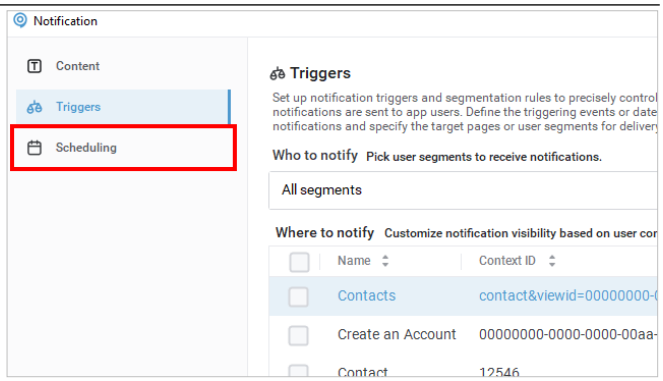
Click on the dropdown **Who to notify** and select **All segments**. You can include the segments you wish to have.



Here, we have selected create an account. We can select all segments to receive notifications.

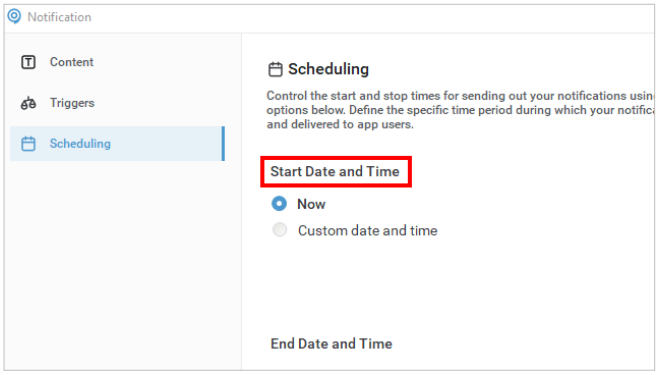


Click on the button **Scheduling.**

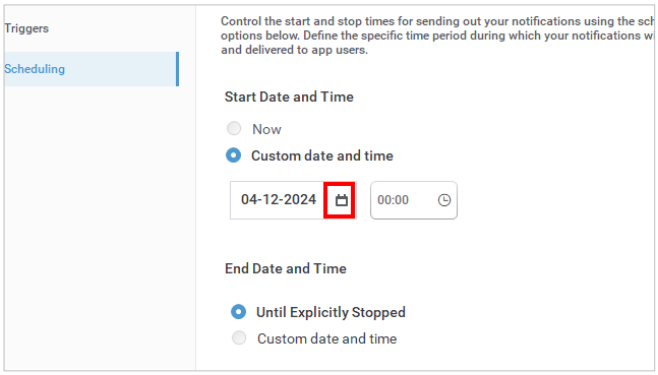


Click on the label Start **Date and Time**.

- **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.

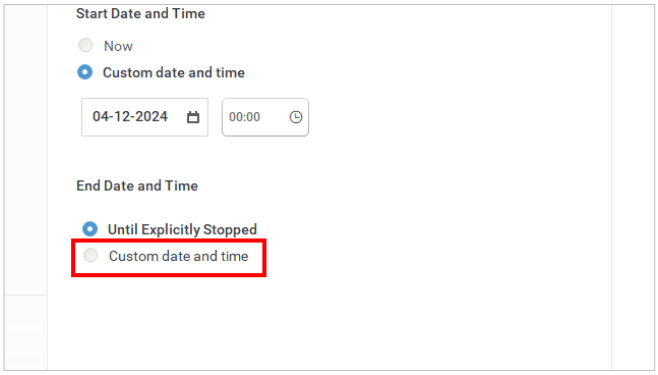


Select a custom date and time that suits your project requirements. To choose a custom date, click on the calendar icon.

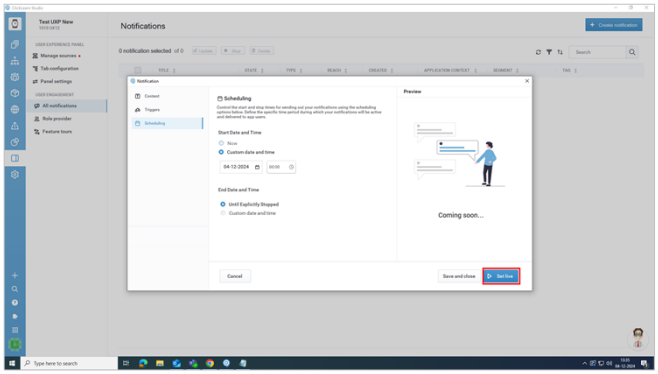


End Date and Time: You can choose the option until explicitly stopped.

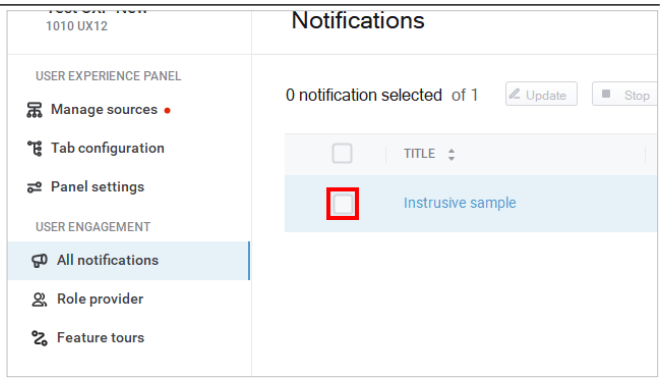
Click on the option **Custom date and time**. You can select the Custom Date and Time.



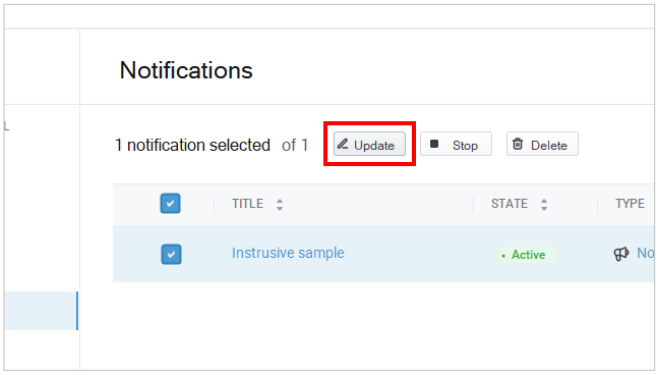
We have chosen the Start Date and Time as **Now** and the End Date and Time **Until Explicitly Stopped**. Click on the button **Set live**.



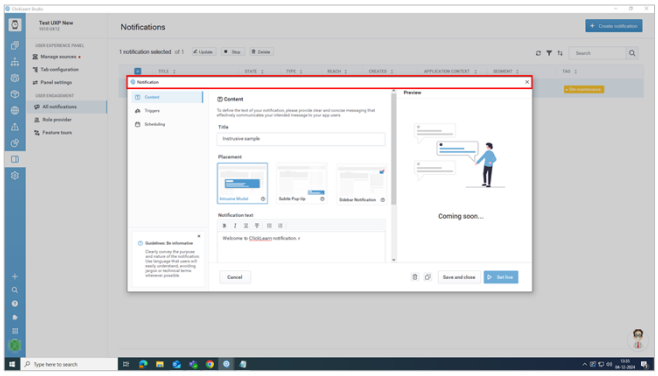
Click on the **checkbox** of grid cell.



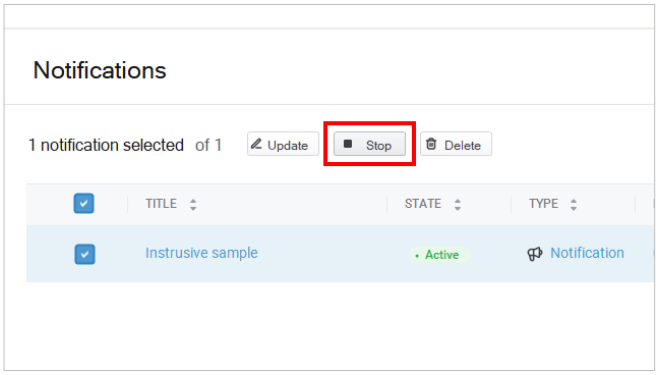
Click on the button **Update.**



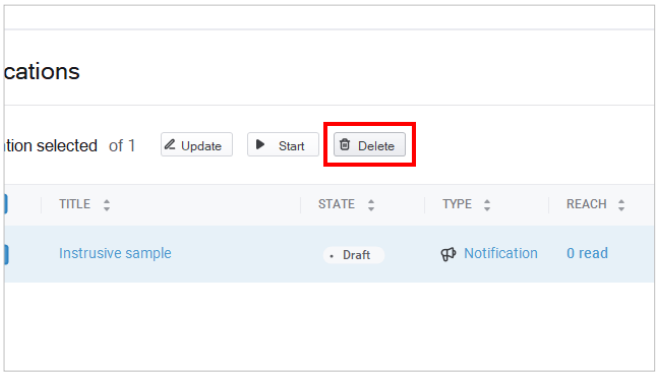
You can update the notification and click on the button Set live.



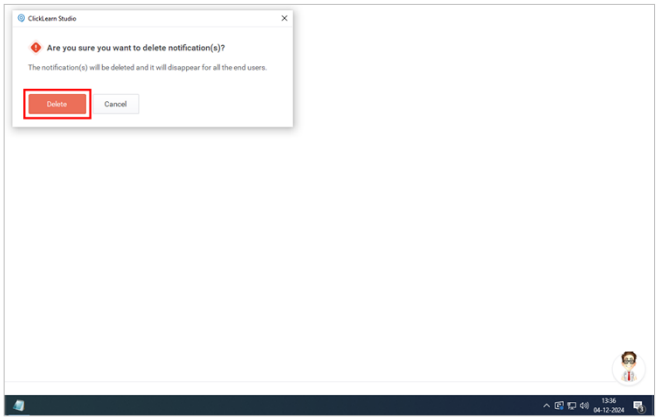
Click on the button **Stop** to stop the notification.



Click on the button **Delete**



Delete: This deletes the selected notification.



17.16. Types of Notifications

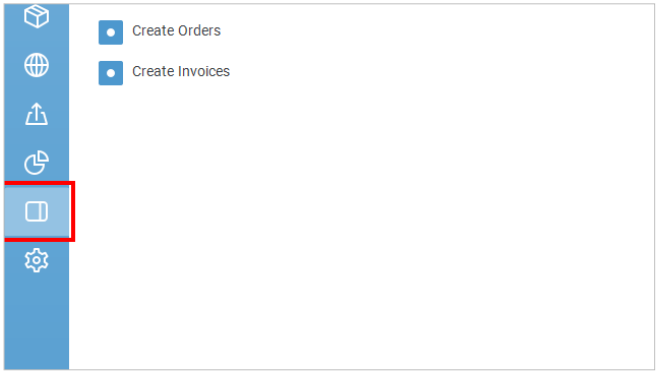
Choose how prominently each message lands, from a full modal to a subtle pop-up or sidebar, so every notification matches its urgency and updates the panel instantly without republishing.

17.16.1. Adding Notifications

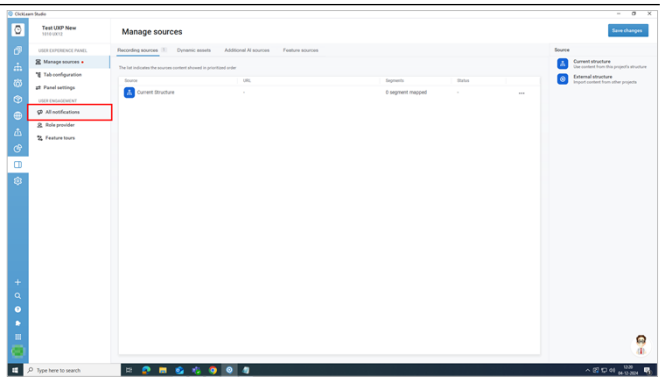
There are three types of notifications in ClickLearn Attain.

- Intrusive Modal
- Subtle Pop-Up
- Sidebar

Listed below are the steps for configuring these notifications.
Click on the button **User Experience Configuration.**

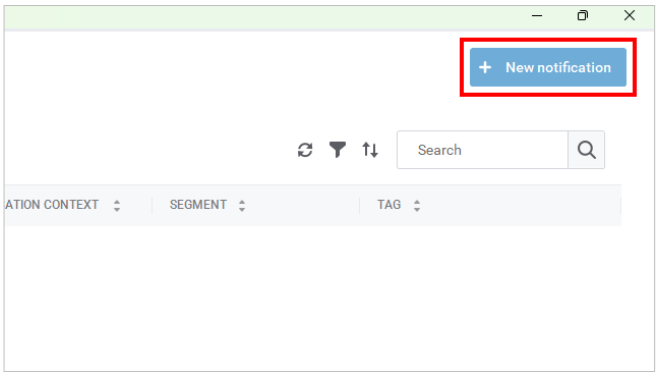


Click on the button **All notifications.**

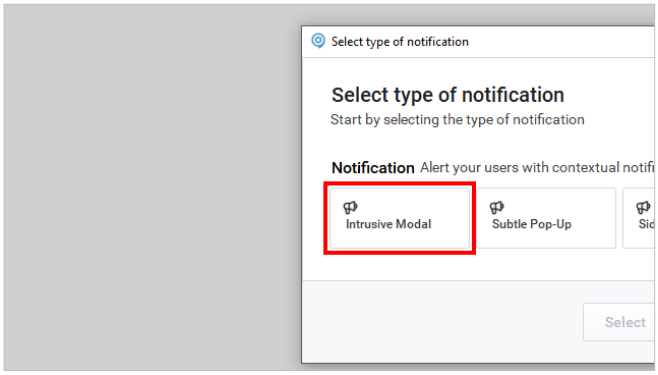


17.16.1.1. Intrusive Modal

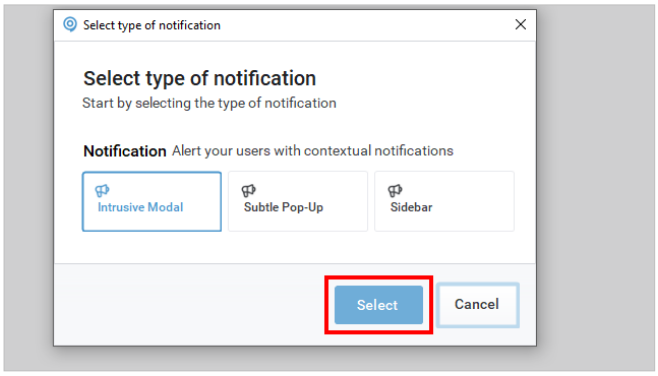
To create an intrusive modal notification, click on the button **New notification**.



Click on the label **Intrusive Modal**.

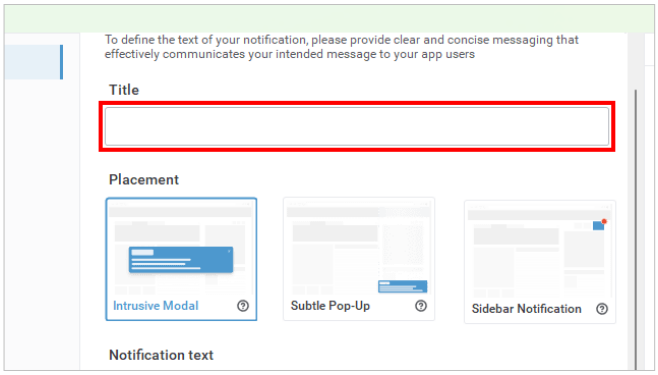


Click on the button **Select.**

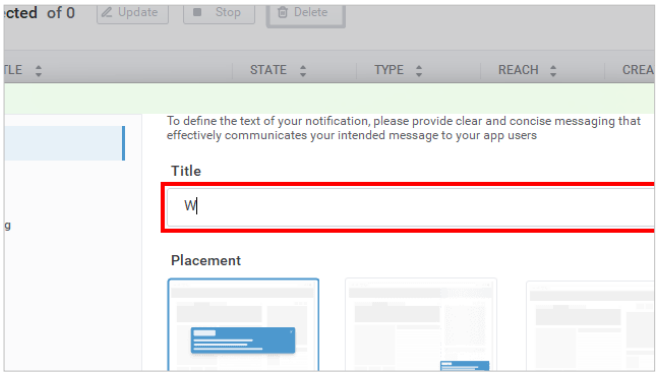


Click on the textbox **Title**.

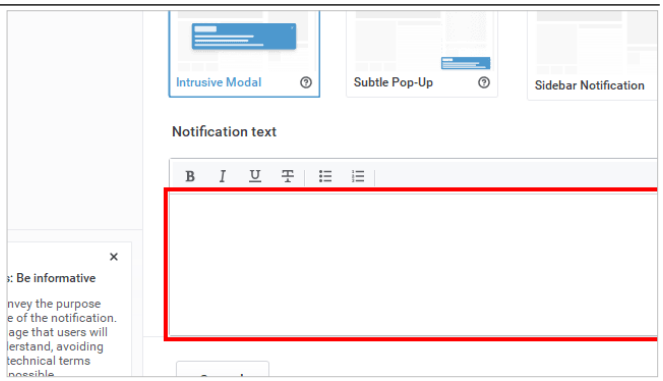
Here, you can provide the title name for the notification based on your project requirements.



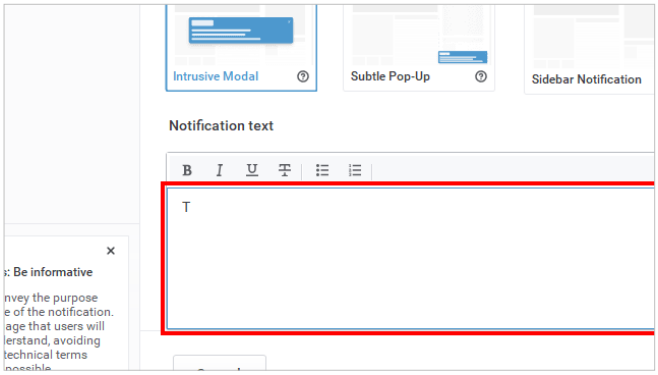
Enter **Title**.



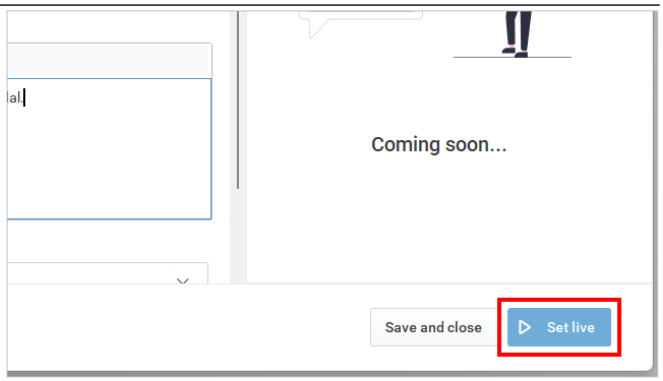
Click on the text editor **Content.**



Enter **Content**.

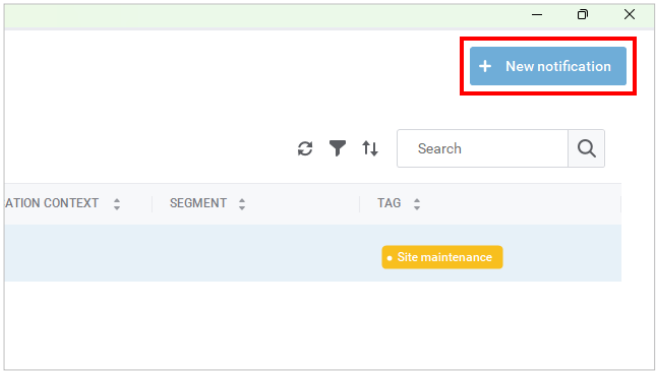


Click on the button **Set live**.

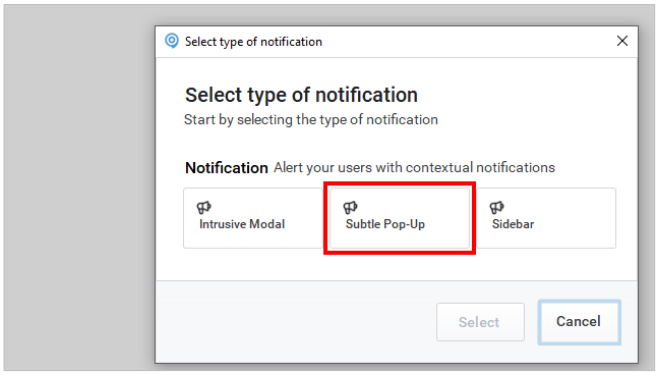


17.16.1.2. Subtle Pop-Up

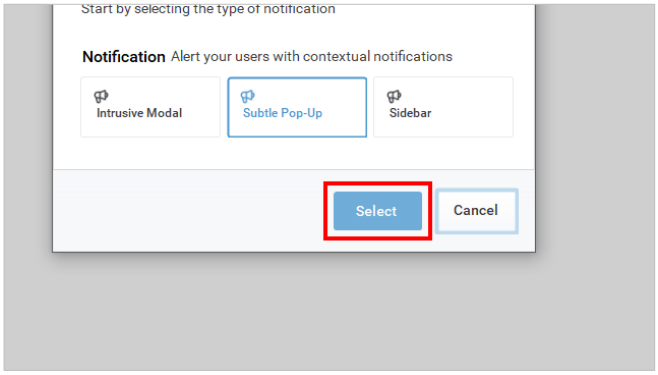
To create a subtle pop-up notification, click on the button **New notification**.



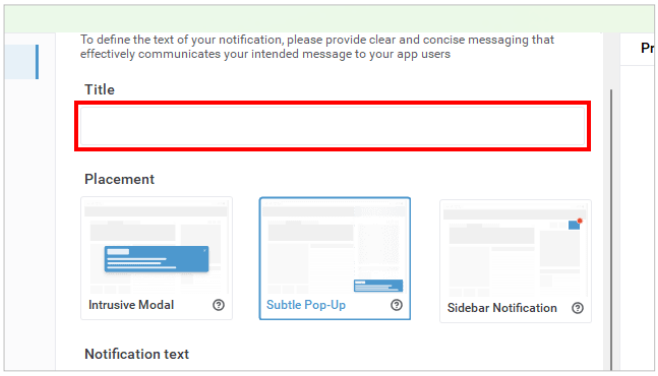
Click on the label **Subtle Pop-Up**.



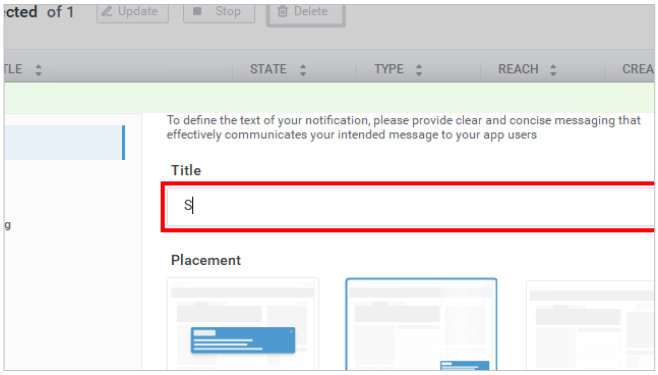
Click on the button **Select.**



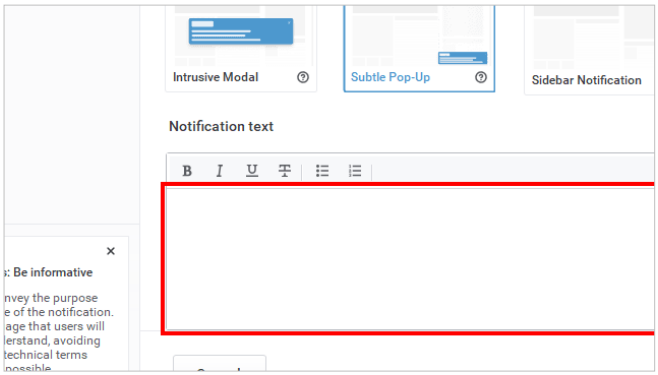
Click on the textbox **Title**.



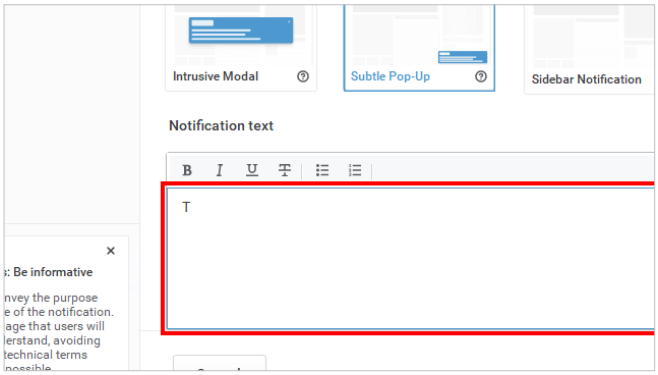
Enter **Title**.



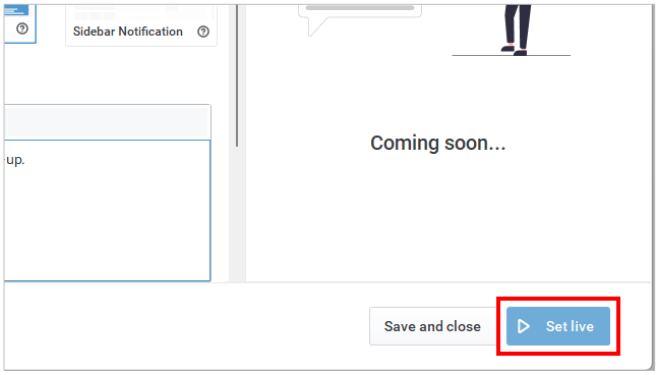
Click on the text editor **Content**.



Enter **Content**.

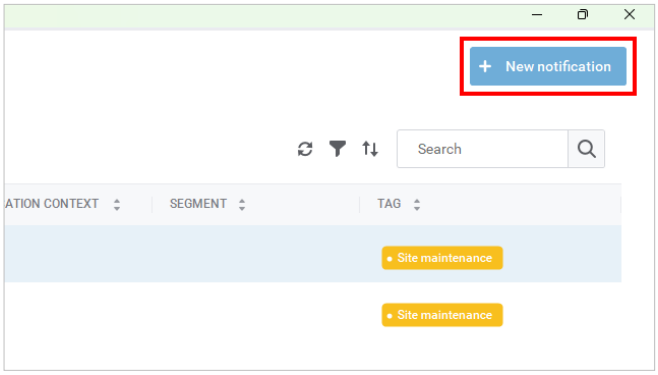


Click on the button **Set live**.

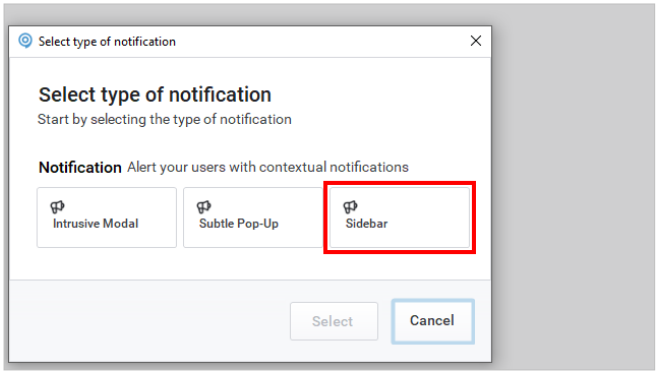


17.16.1.3. Sidebar

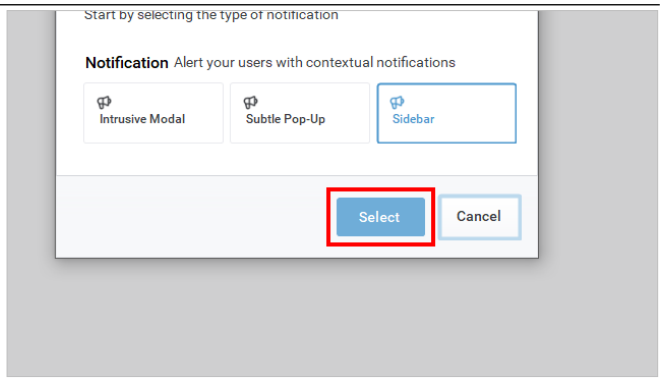
To create a sidebar notification, click on the button **New notification**.



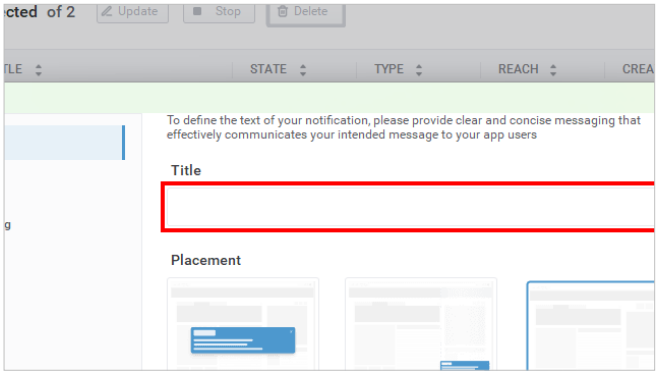
Click on the label **Sidebar**.



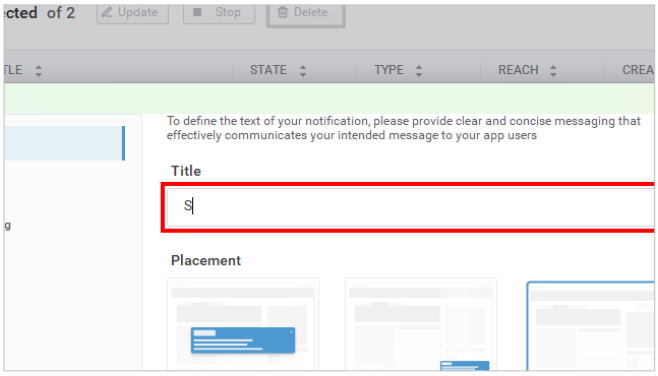
Click on the button **Select.**



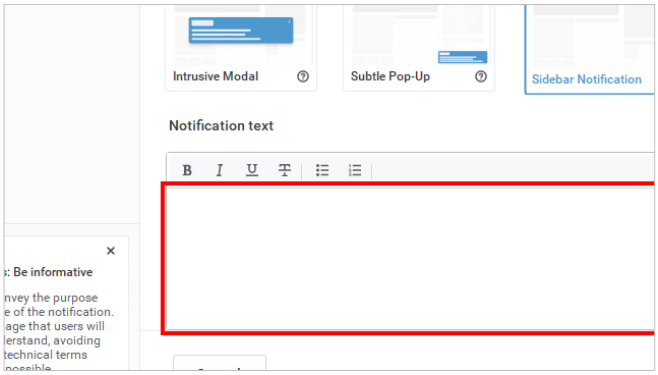
Click on the textbox **Title**.



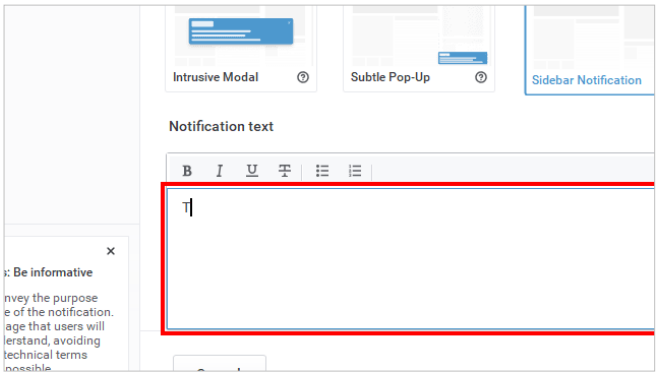
Enter **Title**.



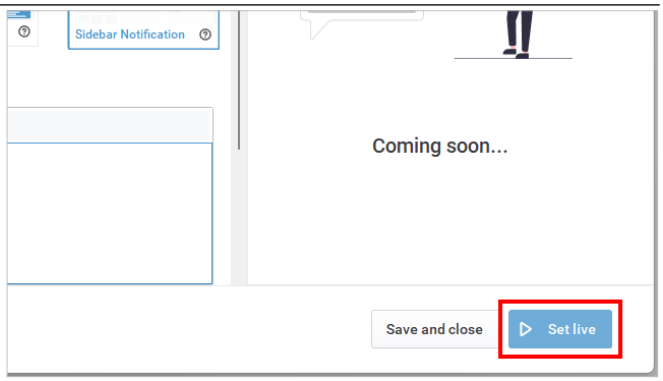
Click on the text editor **Content**.



Enter **Content**.



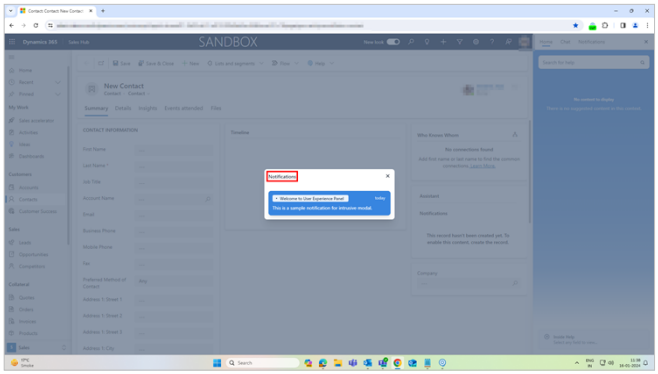
Click on the button **Set live**.



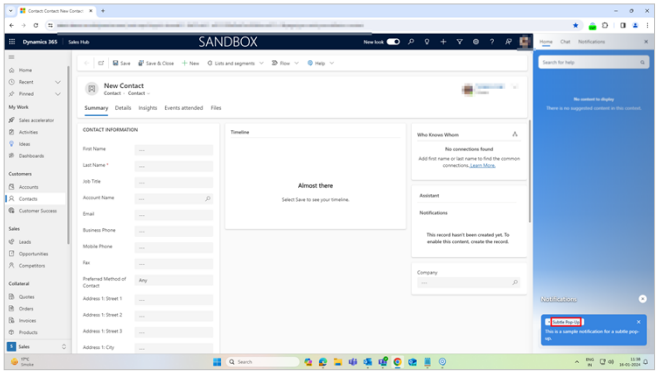
17.16.2. Preview Notifications

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.

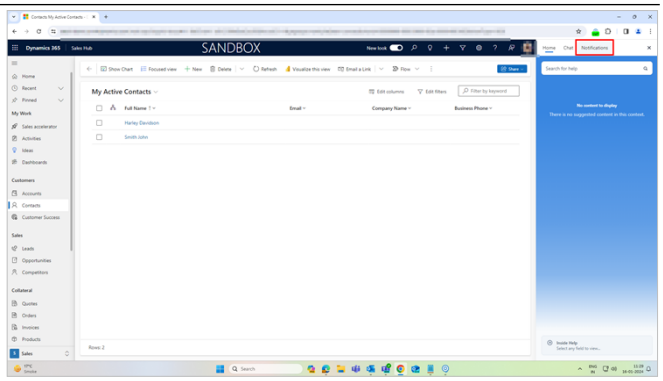
NOTE: Any changes done to the notifications do not require producing and publishing your project. The changes are portrayed directly on the UXP Panel.
Notifications: This is what the intrusive modal notification looks like.



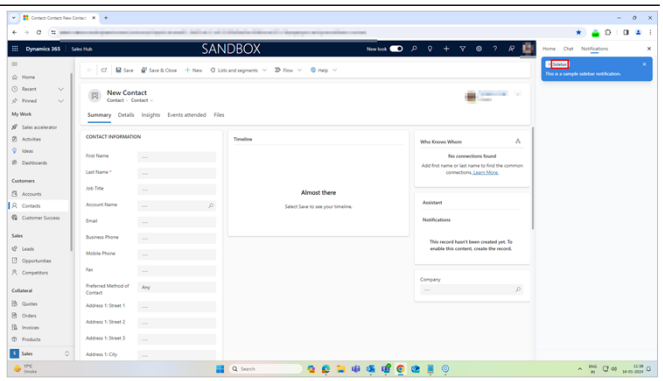
Subtle Pop-Up: This is what the subtle pop-up notification looks like.



Click on the button **Notifications**.



Sidebar: This is what the sidebar notification looks like.



17.17. Create a Feature Tour

Stitch steps from any recording into a single guided tour, so new users learn a feature end to end through video or on-screen Assist, in the order that makes sense for them.

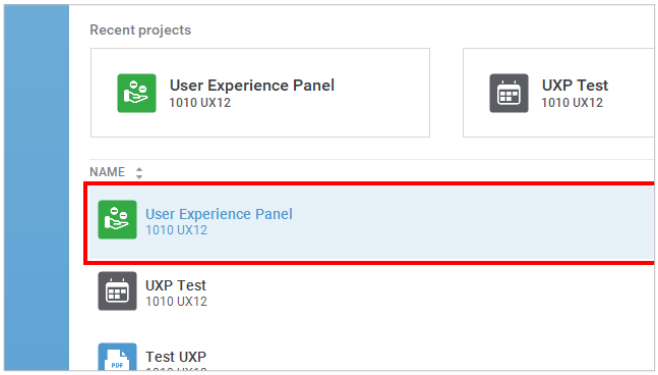
17.17.1. Introduction

This tool offers step-by-step instructions and contextual assistance, making navigation and system utilization more efficient.

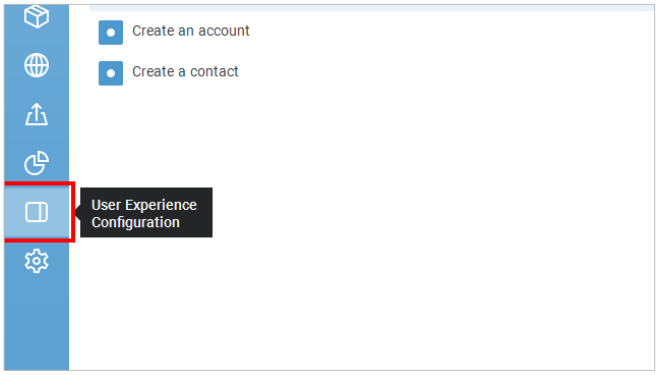
17.17.1.1. Feature Tour

Open the project where you wish to add the feature tour.

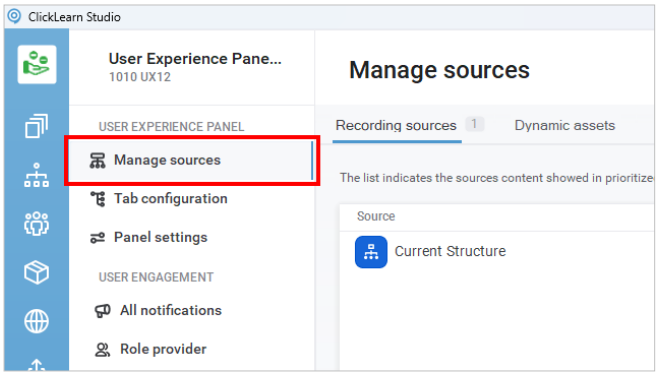
Double-click on the grid cell **NAME** with the value **User Experience Panel**.



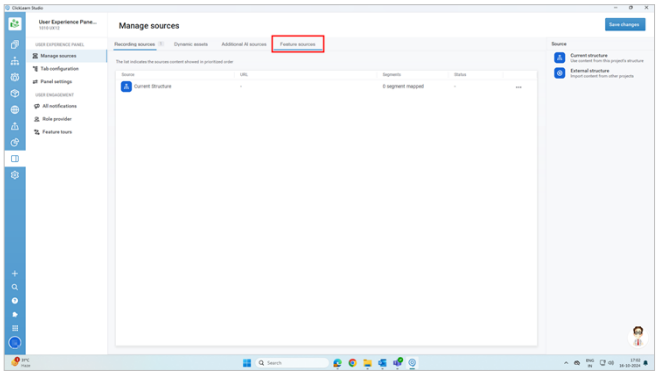
Click on the button **User Experience Configuration**.



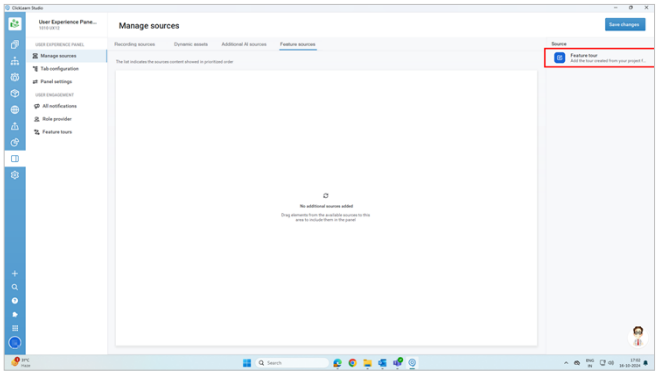
Click on the button **Manage sources**.



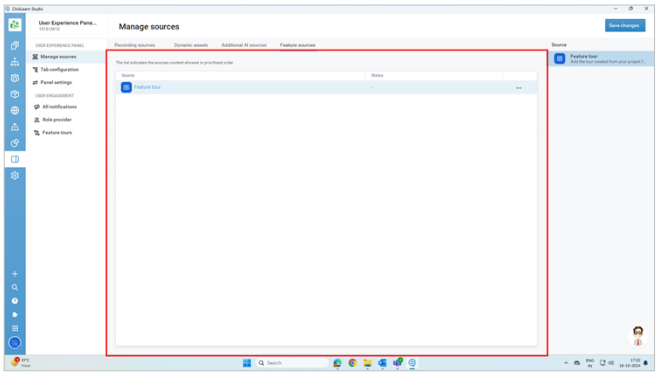
Click on the tab item **Feature sources**.



Click on the node **Feature tour**.

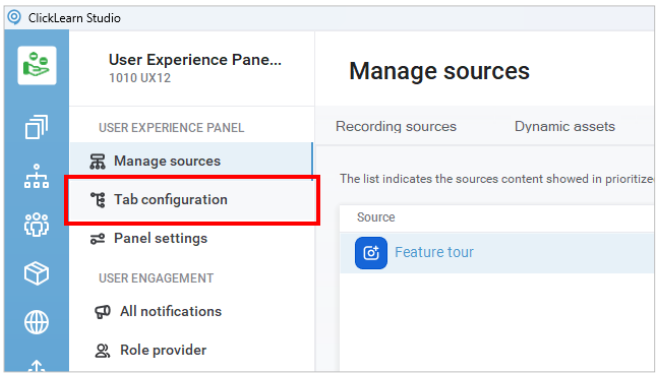


Drag and drop the feature tour option in the empty panel.

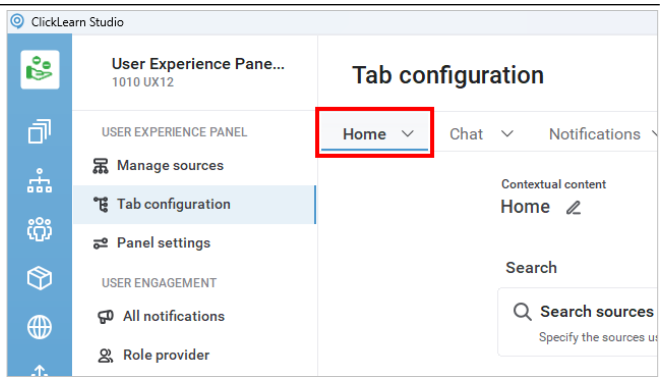


17.17.1.1.1. Adding Feature Tour in Tabs

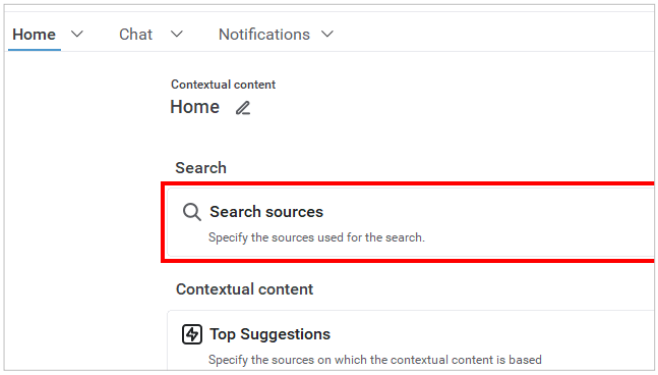
Click on the button **Tab configuration**.



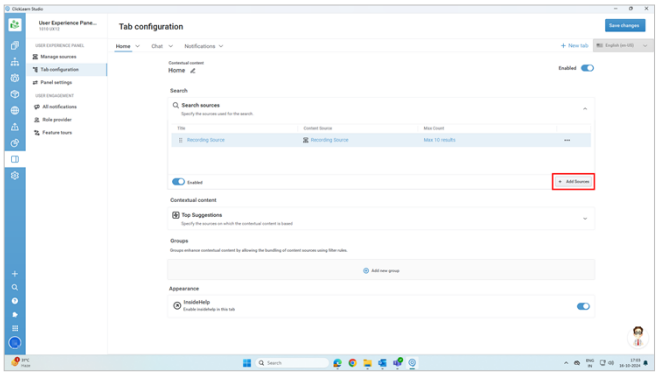
Click on the tab item **Home**.



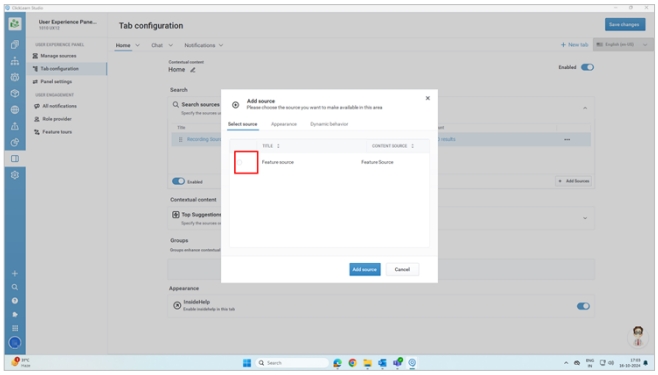
To add the Feature tour as a source for the search sources, click on the collapsible panel **Search sources**.



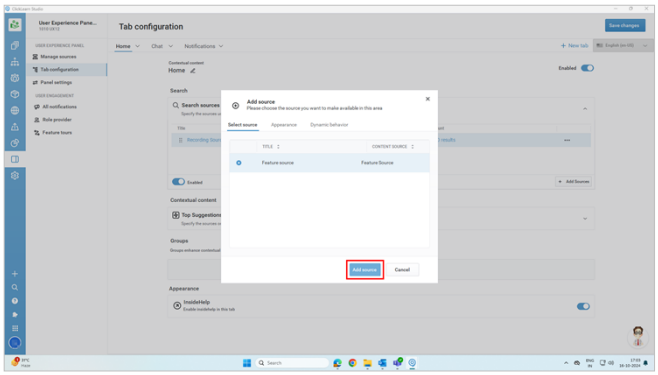
Click on the button **Add Sources**.



Click on the radio button to select Feature source.

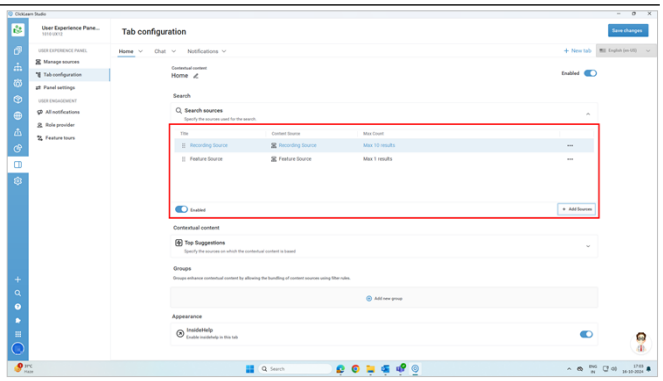


Click on the button **Add source**.



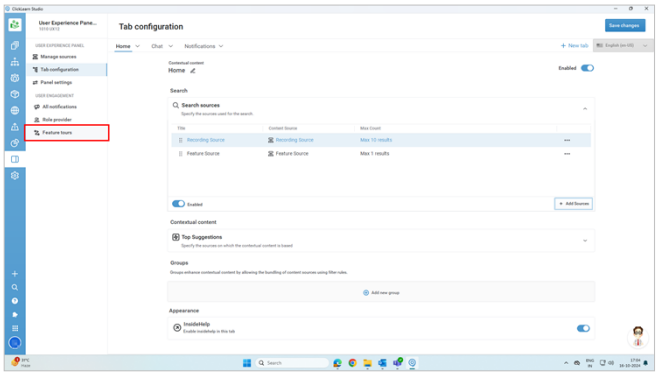
Click on the collapsible panel **Search sources**.

We have added the Feature Source to the Search sources for the Home tab. Similarly, you can add the feature source for top suggestions and groups.

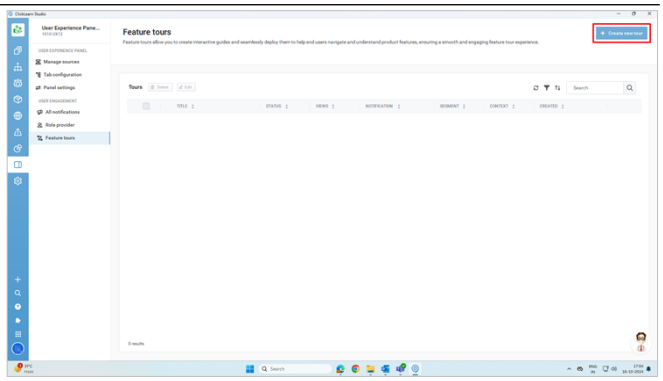


17.17.1.1.1.1. Create new tour

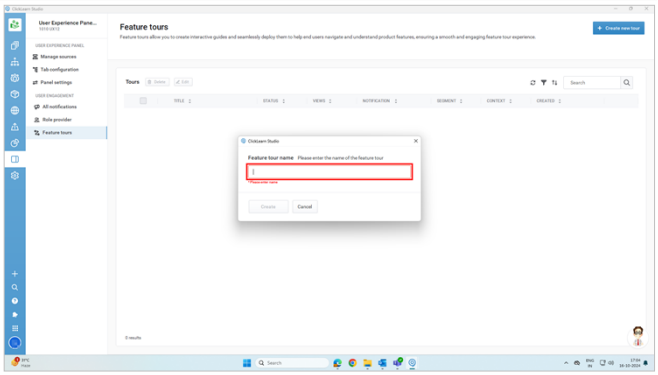
Click on the button **Feature tours**.



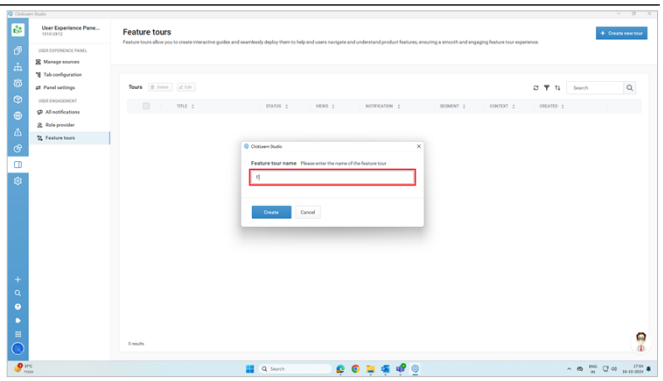
Click on the button **Create new tour**.



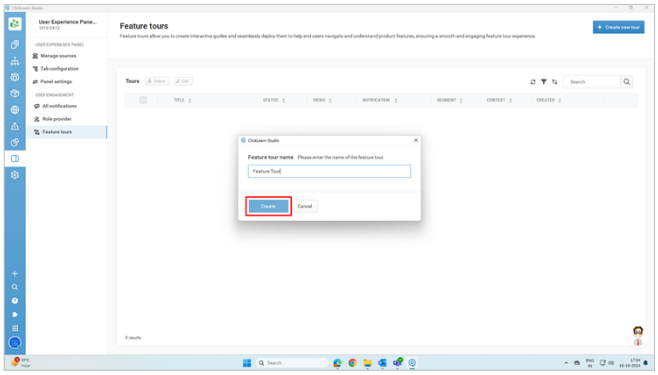
Click on the textbox **Txt Rename** to enter the name of the feature tour.



Enter **cc Txt Rename**.
NOTE: Please ensure that the term **Onboarding** is not used when naming the feature tour.

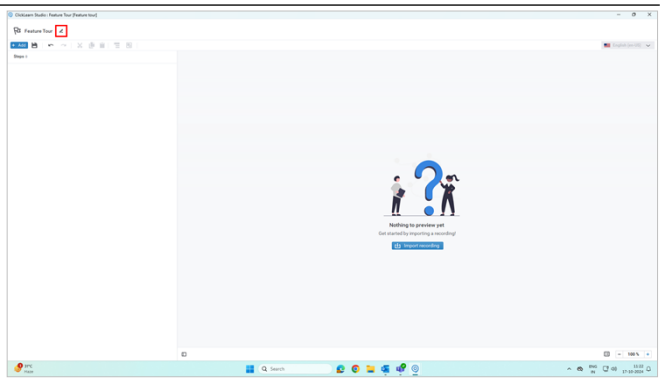


Click on the button **Create**.

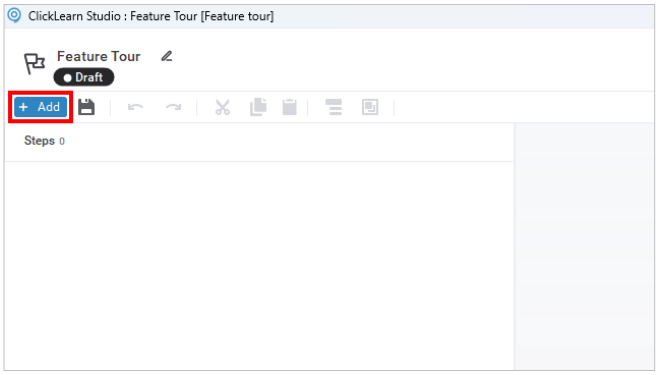


This displays the basic view of the feature tour.

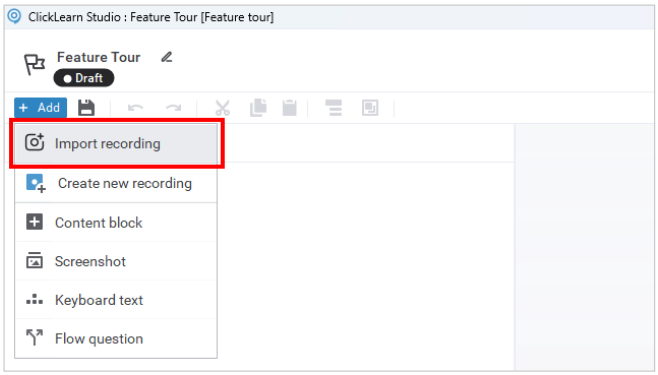
Rename: To rename the feature tour.



Click on the button **Add**.

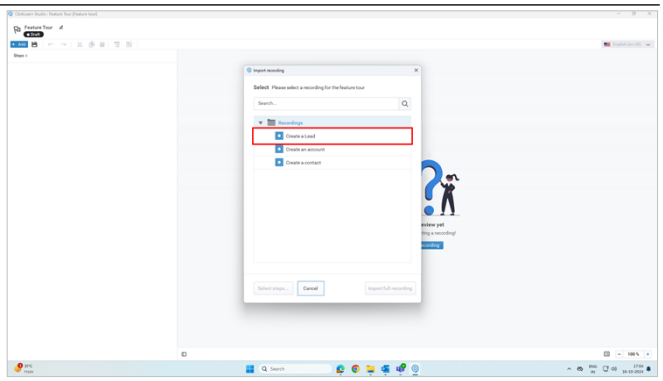


Click on the menu item **Import recording**.

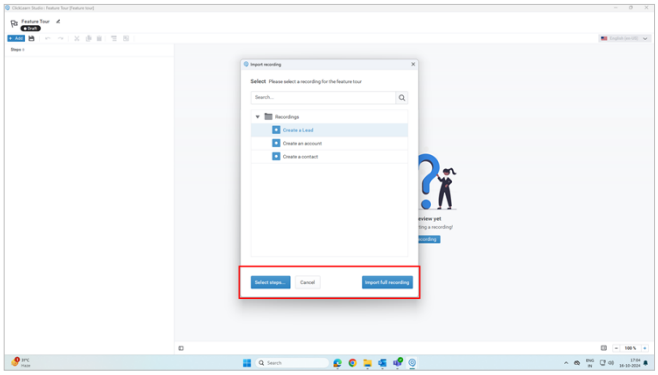


You can select the recording you wish to import.

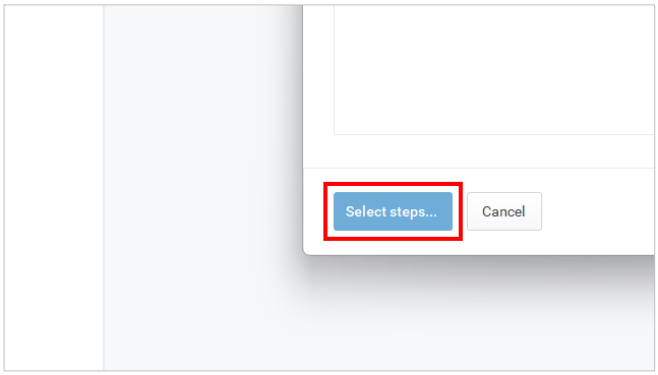
Click on the tree node **Create a Lead**.



When importing a recording, you have two options: import the selected steps or the entire recording.

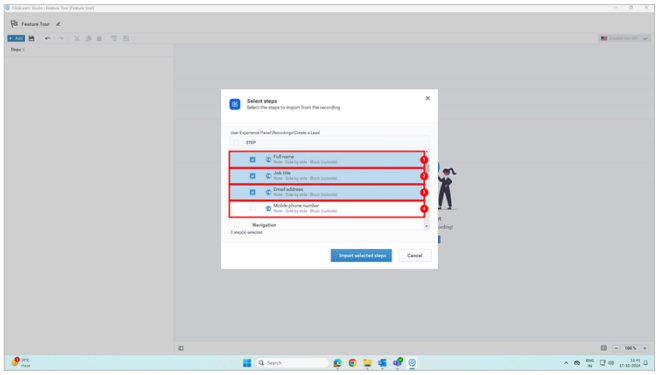


Click on the button **Select steps**.

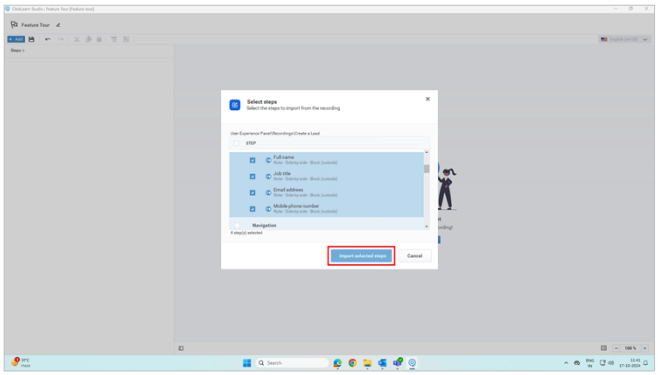


Selected Steps

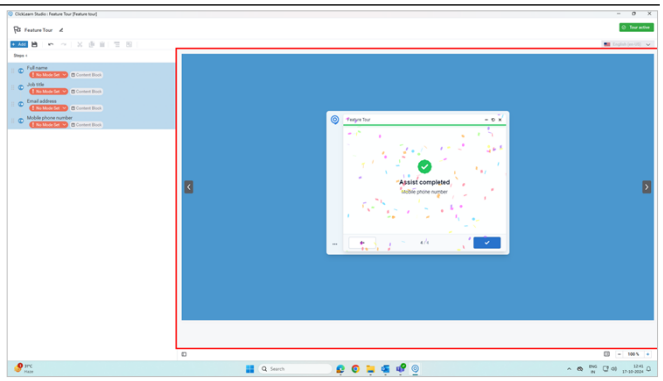
1. Click on the steps **Full name**.
2. Click on the steps **Job title**.
3. Click on the steps **Email address**.
4. Click on the steps **Mobile phone number**.



Click on the button **Import selected steps**.

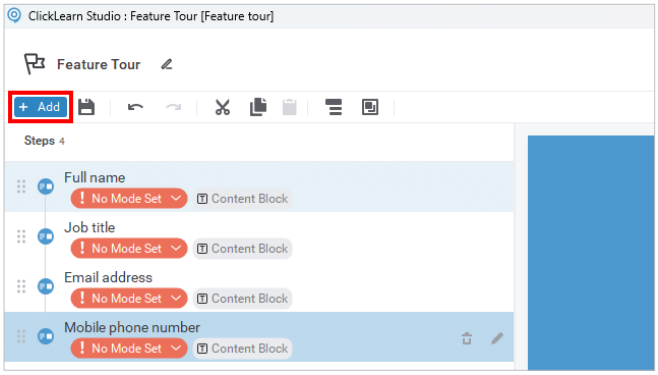


The selected steps are imported.

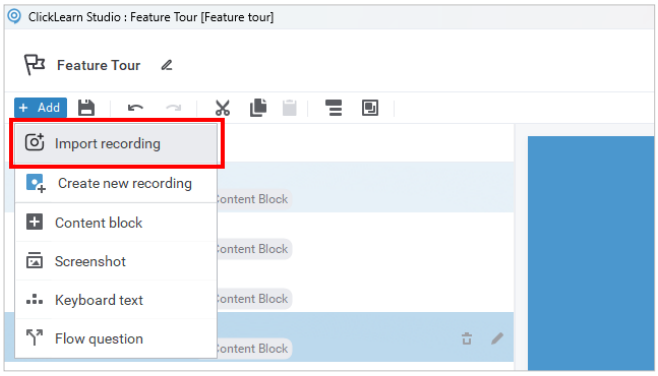


Likewise, you can add steps from different recordings as well.

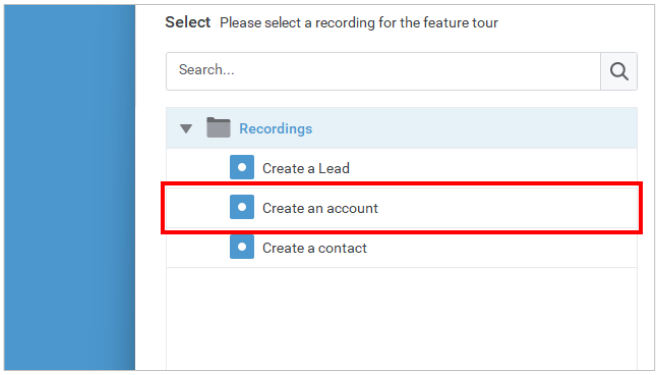
Click on the button **Add**.



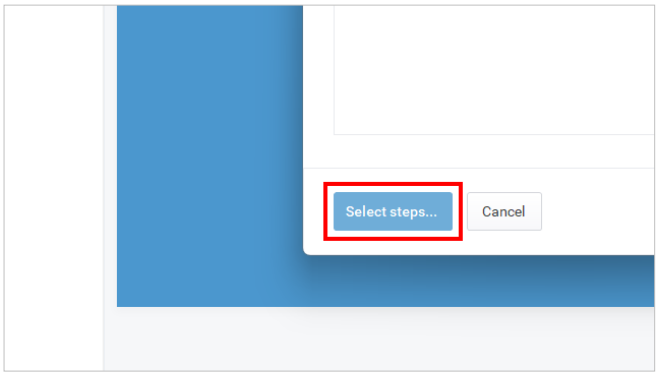
Click on the menu item **Import recording.**



Click on the tree node: **Create an account**.

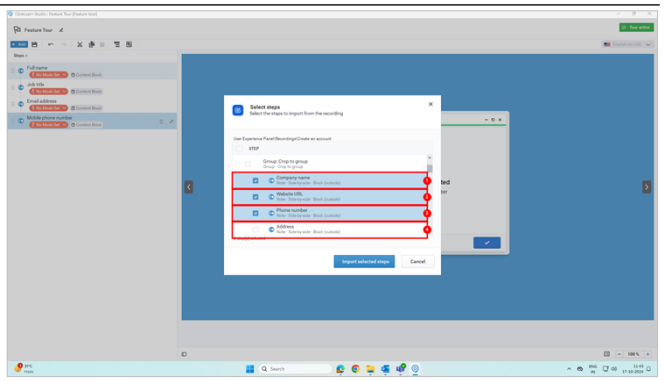


Click on the button **Select steps**.

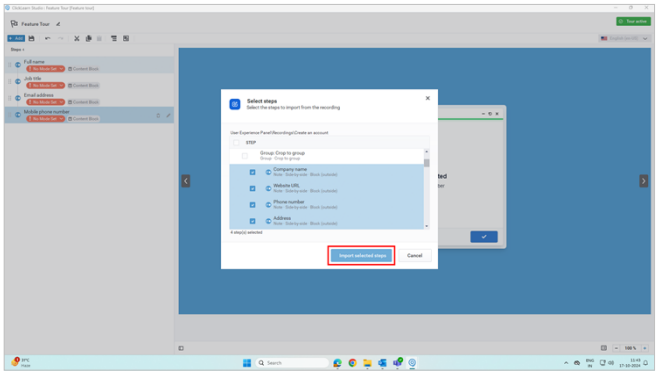


Selected Steps

1. Click on the steps **Company name**.
2. Click on the steps **Website URL**.
3. Click on the steps **Phone number**.
4. Click on the steps **Address**.

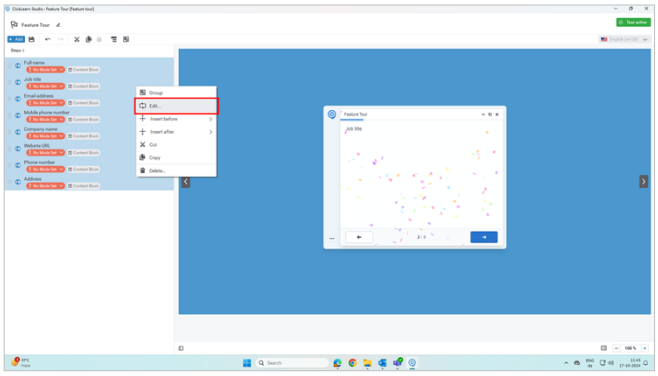


Click on the button **Import selected steps**.



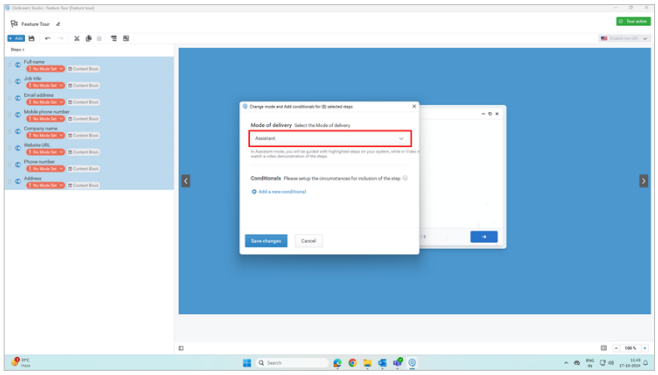
Select all the steps and right-click on the ddlVisualType icon for the step.

Click on the menu item **Edit**.

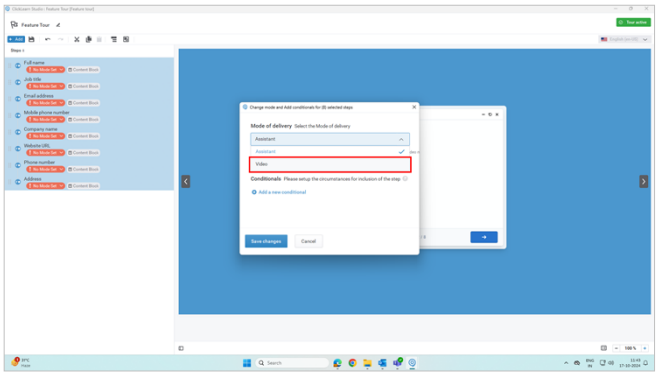


This gives us two options to create different sections: the video and the Assist mode. You can select the mode of delivery depending on your requirements.

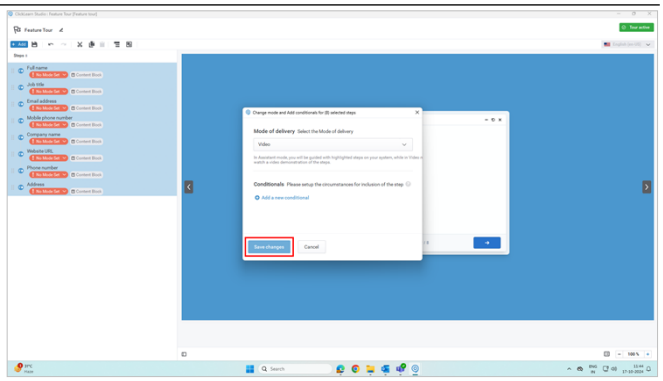
Click on the dropdown **Onboarding Mode**.



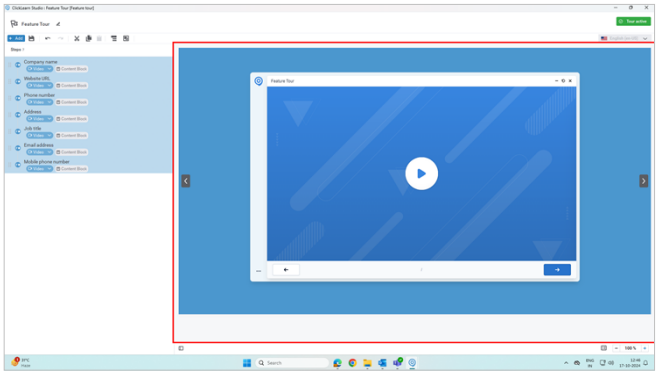
Click on the dropdown item **Video**.



Click on the button **Save changes**.

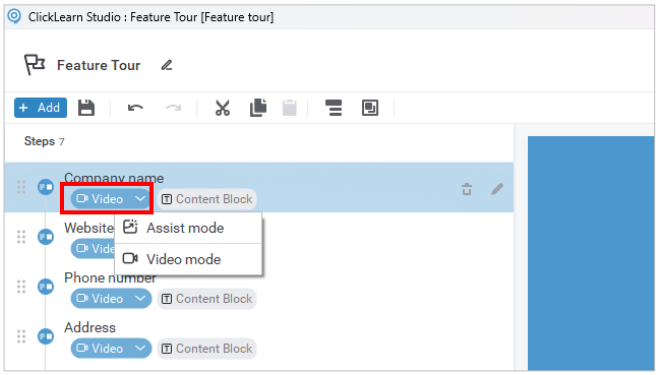


This is how the screen shows when you select the mode of delivery as video.

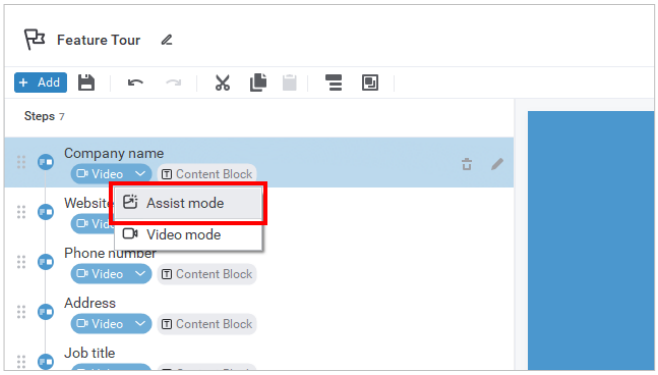


To change the mode of delivery, click on the icon in the step.

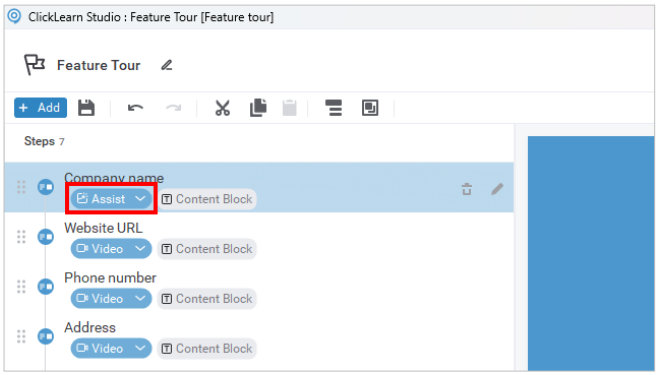
Click on the **VisualType** icon of the step.



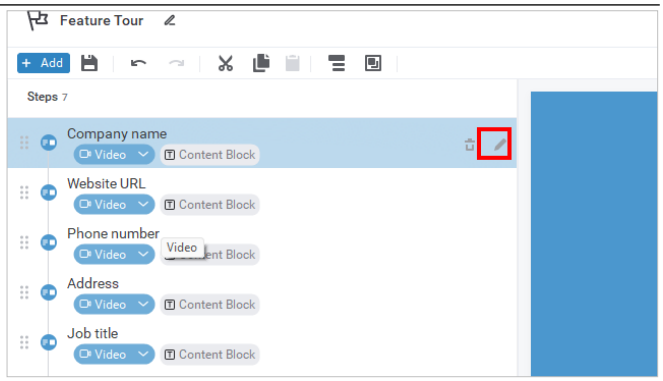
Click on the menu item **Assist mode**.



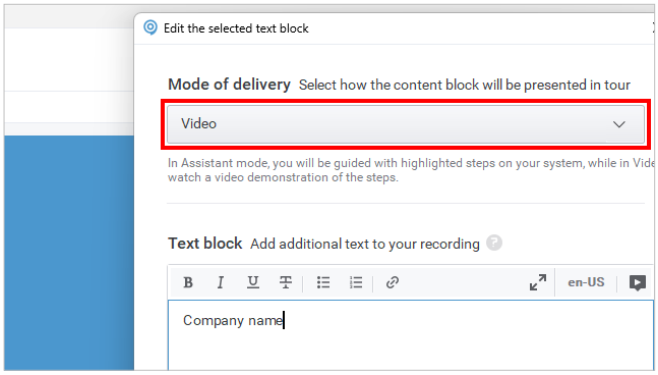
This changes the mode of delivery to Assist.



You can also change the mode of delivery by clicking on the **Edit** icon of the step.

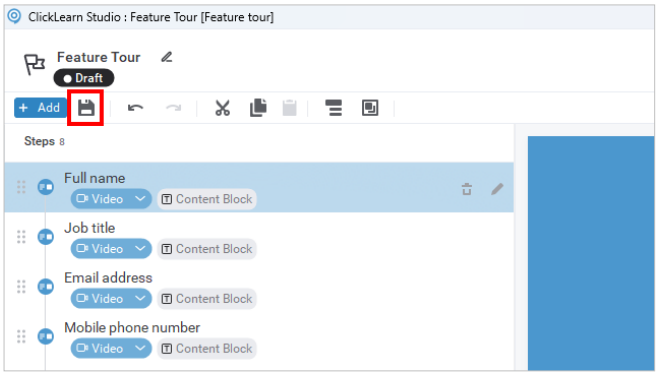


Click on the dropdown **Onboarding Mode** to change the mode of delivery.

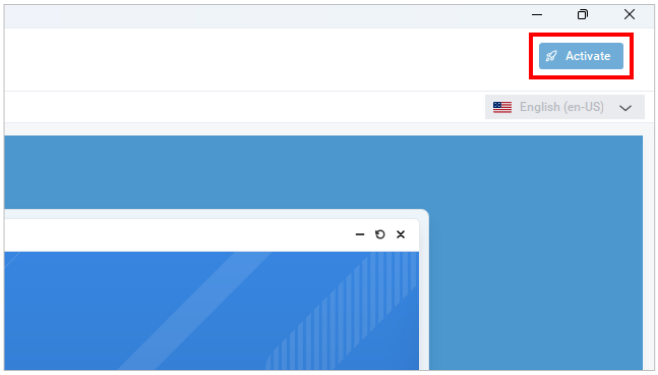


Click on the button **Save (Ctrl+ S)**.

Saving this feature tour will save it as a draft.

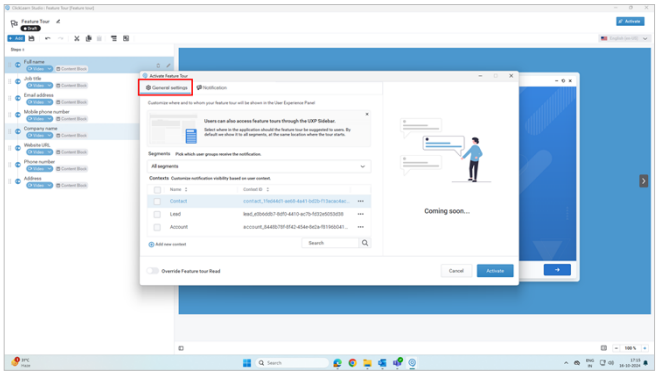


To activate the feature tour, click on the button **Activate**.

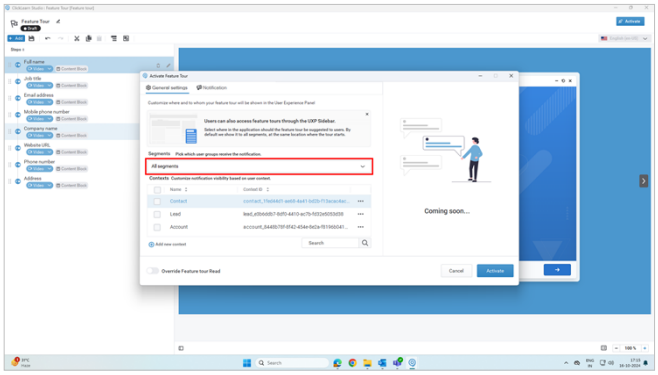


17.17.1.1.1.2. Create a notification in the feature tour.

Click on the tab item **General settings**.

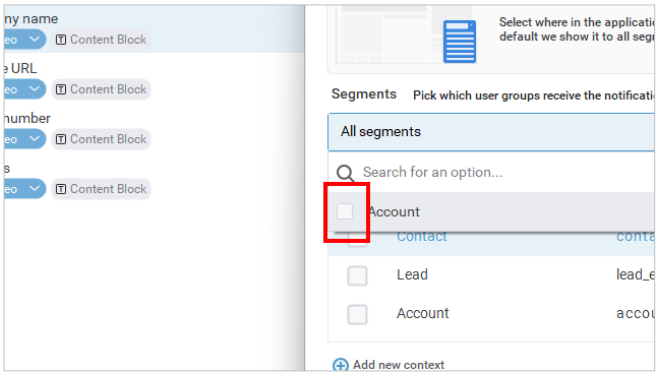


Click on the dropdown **Segments**.



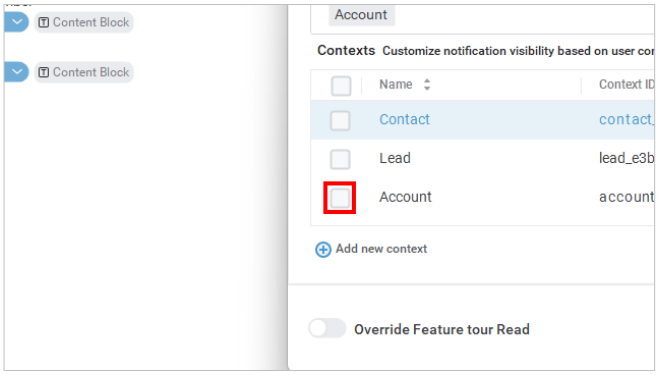
Click on the list view item **Account**.

NOTE: These are the segments we have created in the structure. The segment you select here will be displayed in the notification.

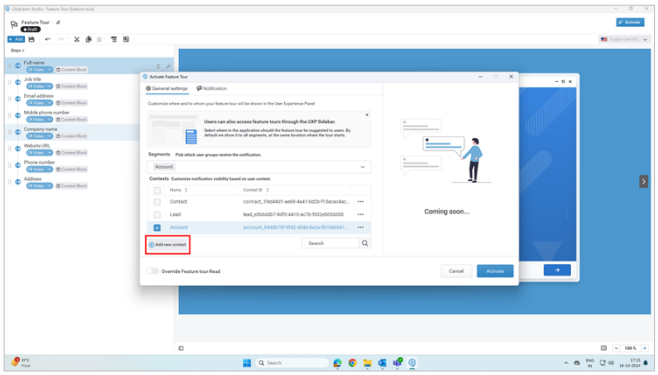


Click on the checkbox of the grid cell: **Select**.

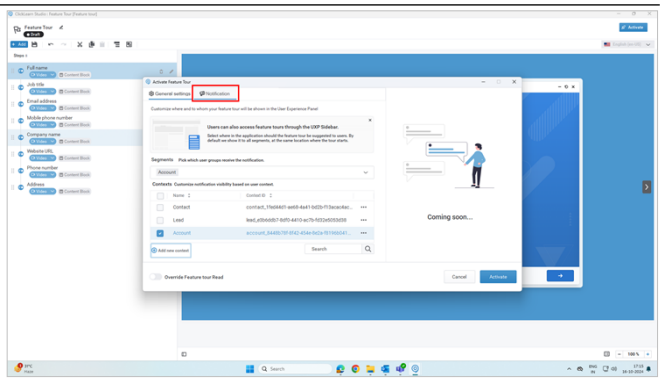
This is the app context associated with our recordings.



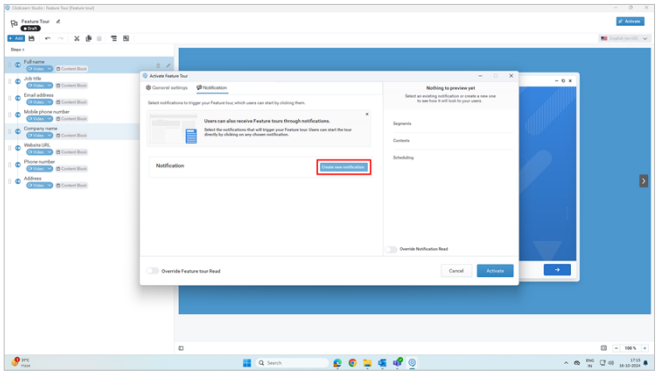
To add a new app context, click on the icon **Add new context**.
NOTE: If you want to display it in the contextual area without pushing it to the notification, simply click 'activate.' This will ensure it appears only in the contextual area and not in the notification. If you decide to push it to the notification, you must create a notification.



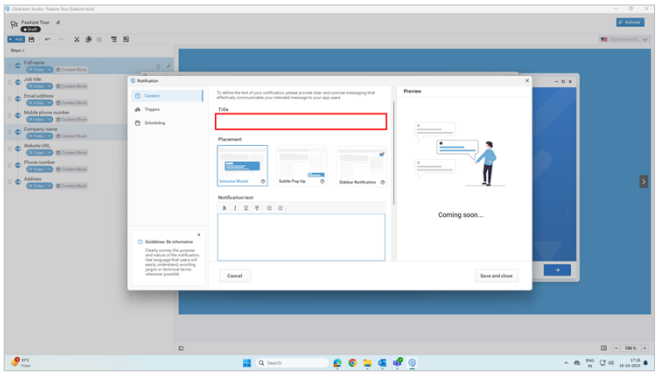
Click on the tab item **Notification**.



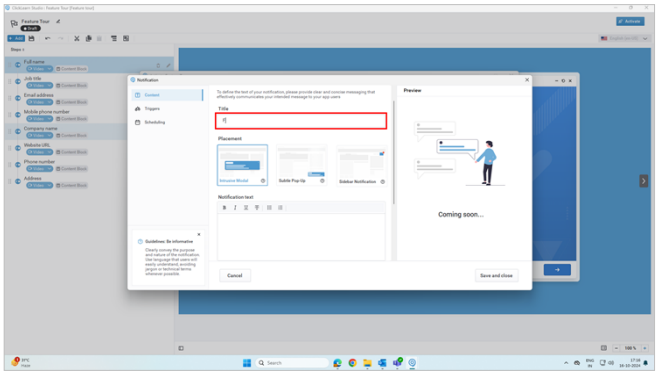
Click on the button **Create new notification**.



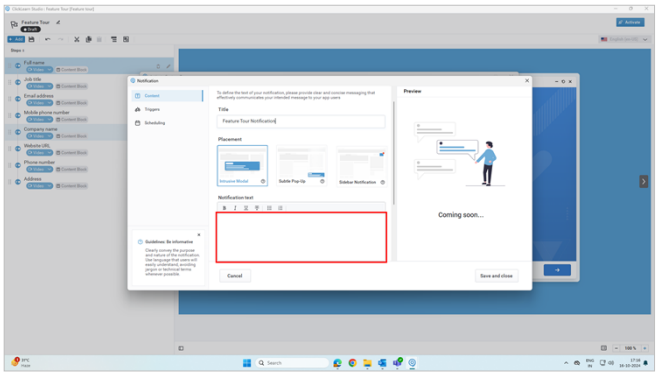
Click on the textbox **Title**.



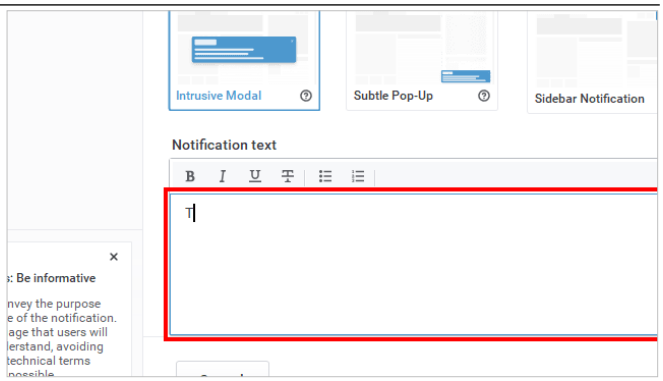
Enter **Title**.



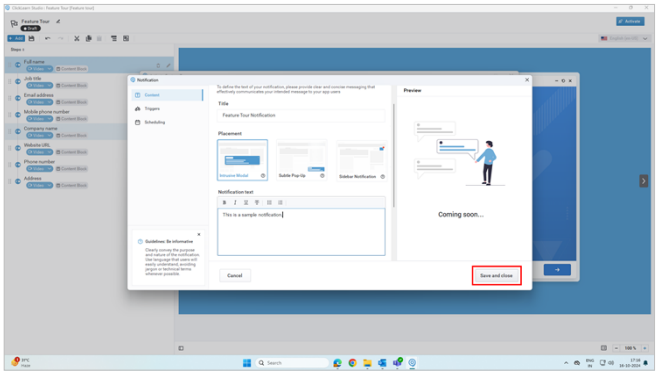
Click on the text editor **Content**.



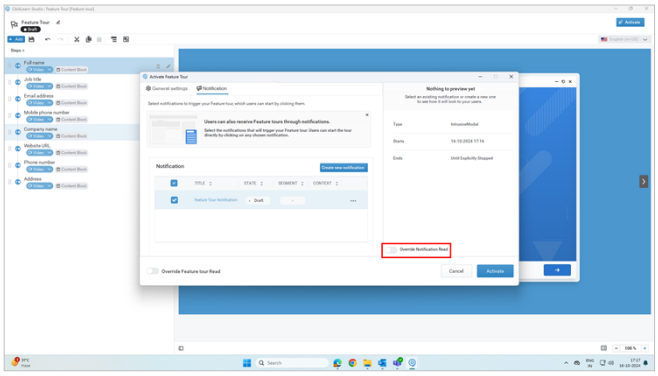
Enter **Content**.



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



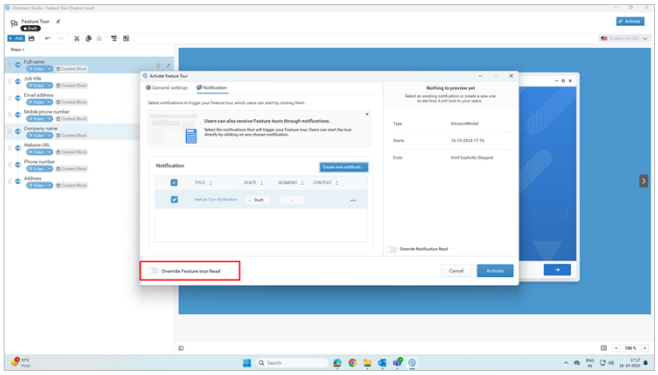
Click on the label **Override Notification Read**.



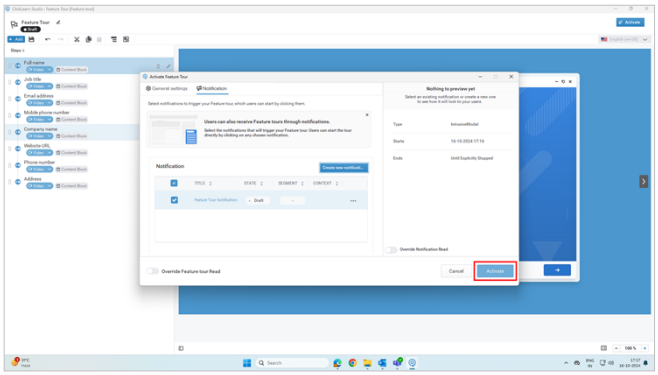
Click on the label **Override Feature tour Read**.
For now, we have two options:

Override Notification Read: When a notification is activated, suppose 10 users have received it and 5 have read it. If you click this button and reactivate the notification with some changes, the read count will reset to zero, starting from scratch.

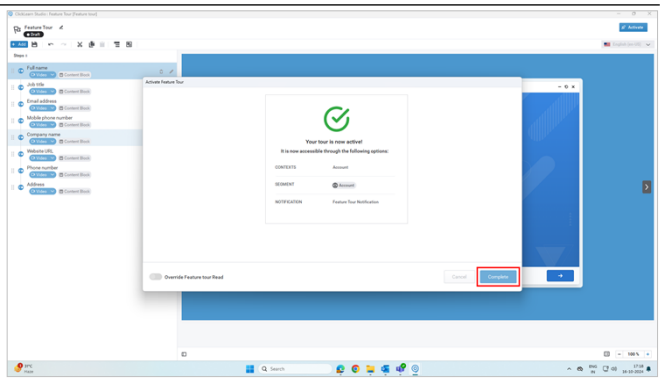
Override Feature Tour: This works similarly. You can see the impact of these changes on the dashboard.



Click on the button **Activate**.



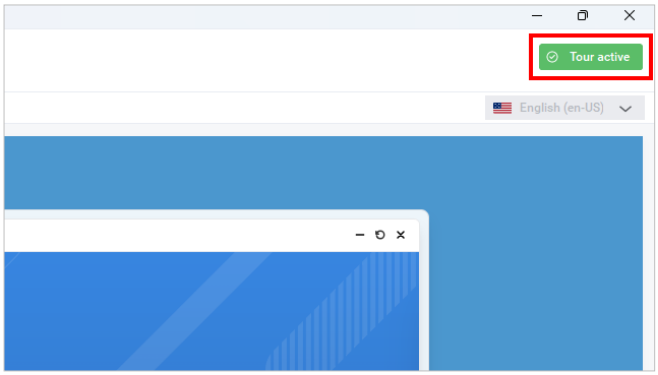
Click on the button **Complete**.



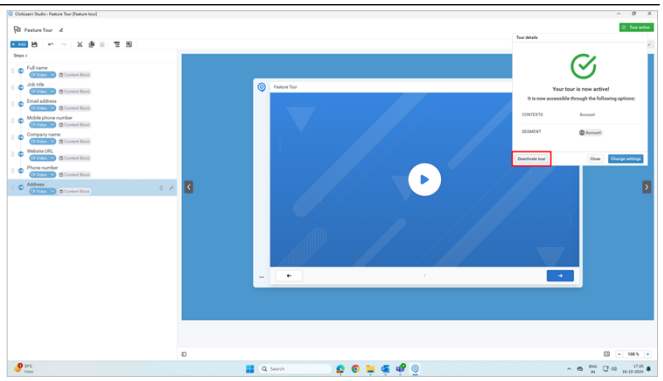
17.17.1.1.1.3. Deactivate Tour

In the top right corner, you can see that the tour is active.

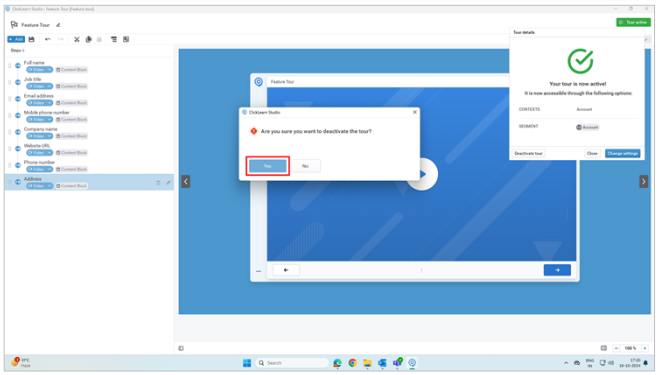
To deactivate the tour, click on the button **Tour active**.



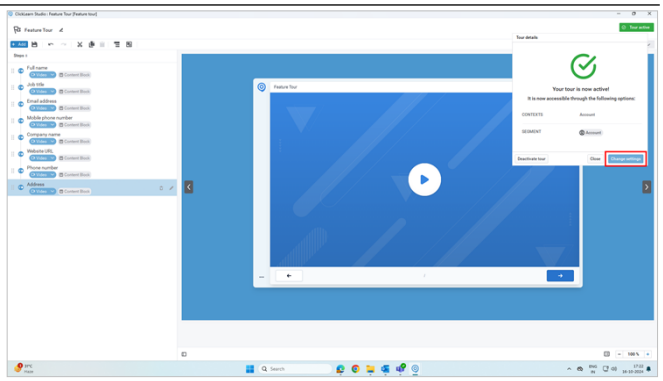
Click on the button **Deactivate tour**.



Click on the button **Yes**.



Click the **Change settings** button to adjust the general or notification settings. This will open the general settings dialog box.



17.18. Set Up Multilingual UXP

Serve every user in their own language from a single link, so UXP detects each person's system language and shows the right recordings, chat answers, notifications, and tours automatically.

17.18.1. What is Multilingual UXP?

Multilingual UXP lets you support users in multiple languages without creating separate portals or managing multiple links. UXP is a side panel that lives inside your business system, like Microsoft Dynamics CRM and helps users learn on the job through guided recordings, AI-powered chat, notifications, and feature tours.

When multi-language is configured, UXP automatically detects the language set in your user's business system and displays everything in that language. Your users see the right content, in the right language, without doing anything extra on their end.

This guide walks you through how to configure Multilingual UXP from scratch.

17.18.1.1. Before You Begin

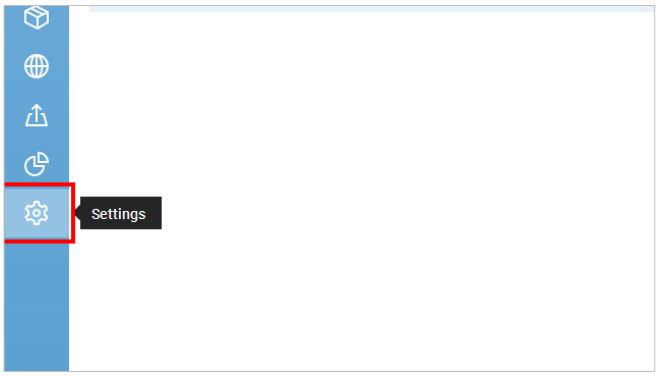
Before you start, make sure you have the following ready:

- A ClickLearn Studio account with admin access.
- At least one recording already created in your project.
- The languages you want to support are already added to your project.
- PDFs or other source documents prepared for each language you plan to configure.

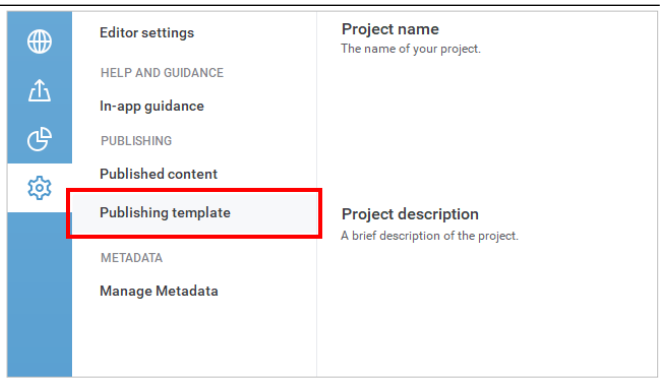
If any of these aren't in place yet, set them up first before continuing with this guide.

17.18.2. Enable UXP in Your Project

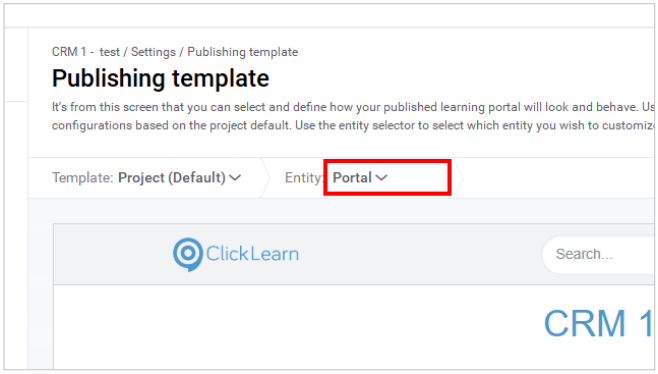
Click on the button **Settings**



Click on the button **Publishing template**

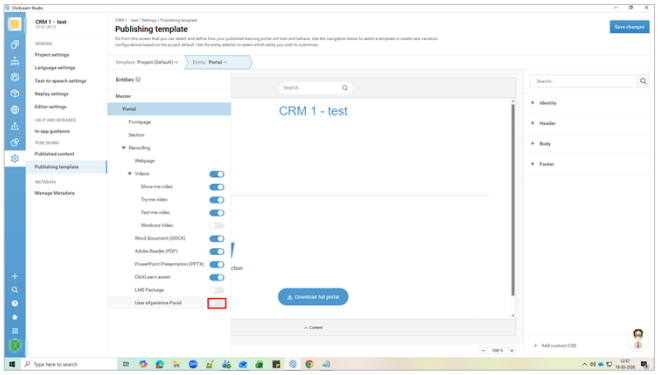


Click on the button **Portal**



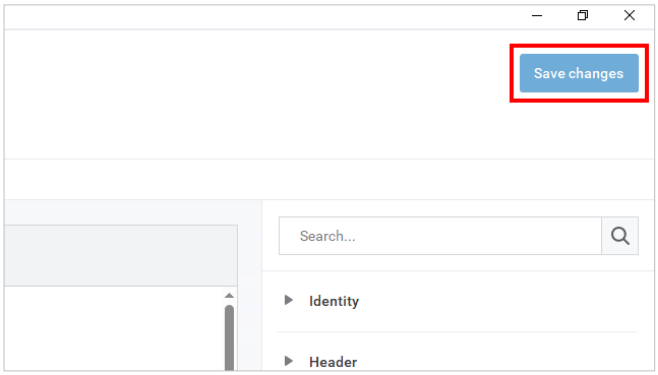
Click on the toggle switch of tree node **User eXperience Panel**

Note: If you don't see the toggle, your account may need it enabled first. Contact Support@clicklearn.com



Click on the button **Save changes**

Once enabled, navigate to the UXP section. If you haven't set up a structure yet, ClickLearn Studio will notify you. You'll need to add at least one recording to your structure before proceeding. You can do this by dragging and dropping a recording into the structure panel.

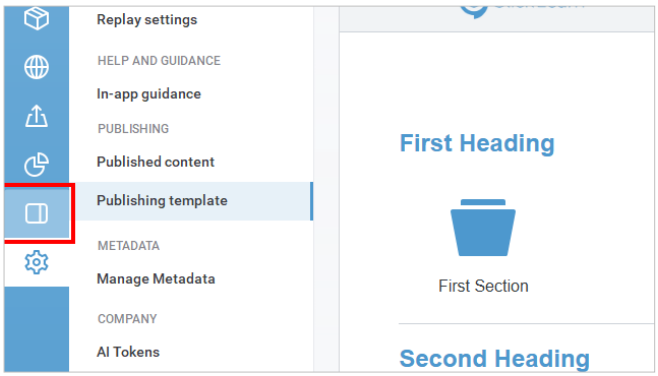


17.18.3. Set Up Your Languages

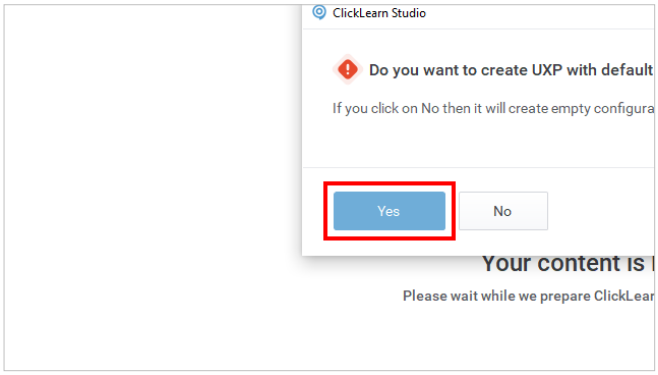
Before you start configuring anything inside UXP, make sure your project already has all the languages you need set up. You don't want to be halfway through configuration and realize a language is missing.

To add languages to your project, go to Project Settings → Languages and add each language you need before proceeding. Once your languages are in place, continue below.

Click on the button **User Experience Configuration**



Click on the button **Yes**



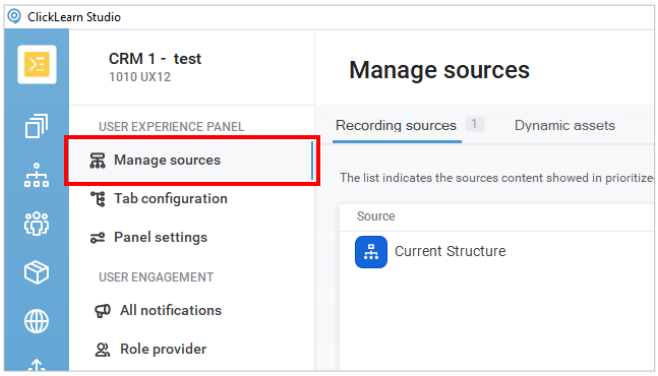
17.18.3.1. Manage Sources

This is where you tell UXP which content belongs to which language. You'll be adding AI sources (like PDFs)

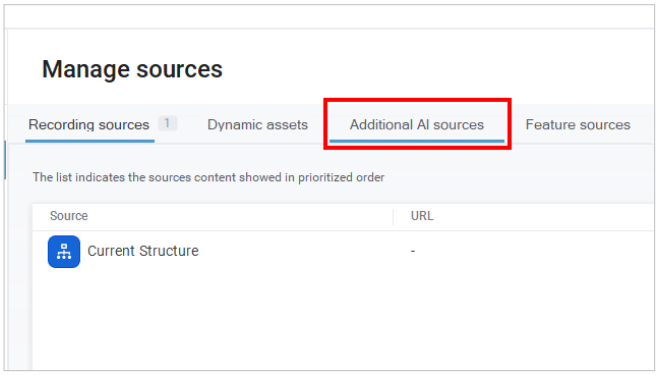
and feature sources (like recordings) so UXP knows what to pull from when a user opens the panel in a specific language.

17.18.3.2. Adding AI Sources

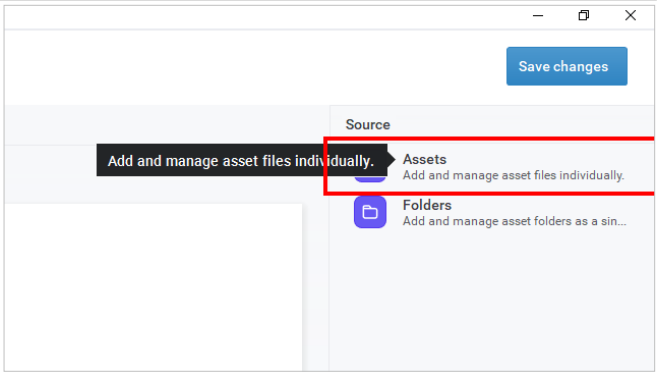
Click on the button **Manage sources**



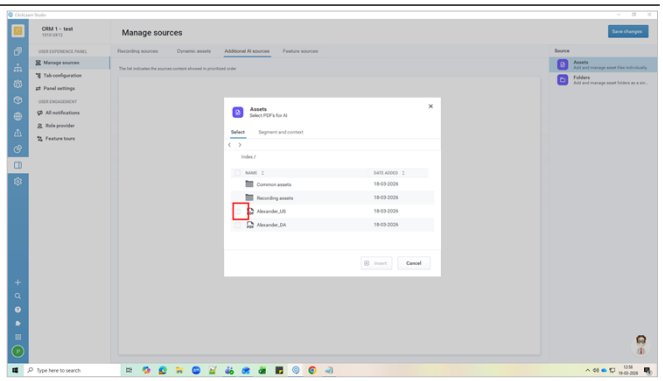
Click on the tab item **Additional AI sources**



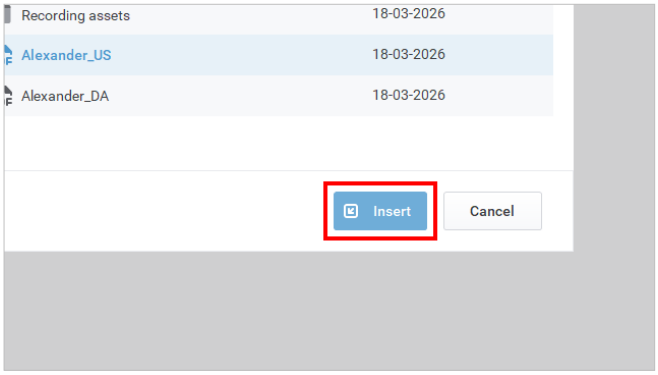
Find your English **asset** in the Assets panel on the left and drag it into the grid.



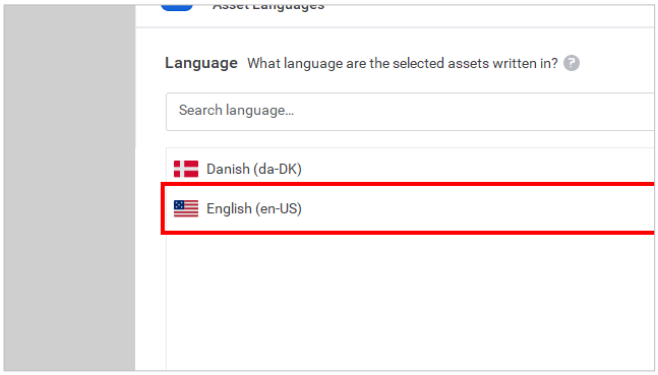
Check the **checkbox** next to the asset to select it.



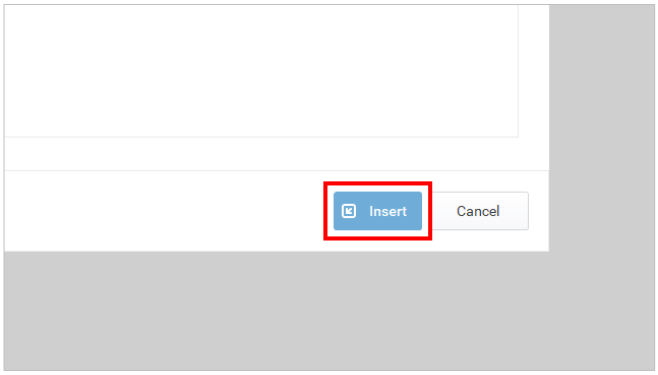
Click on the button **Insert**



Click on the tree node **English (en-US)**

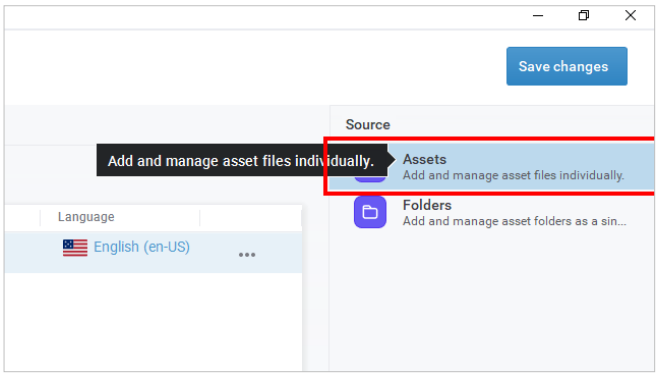


Click on the button **Insert**

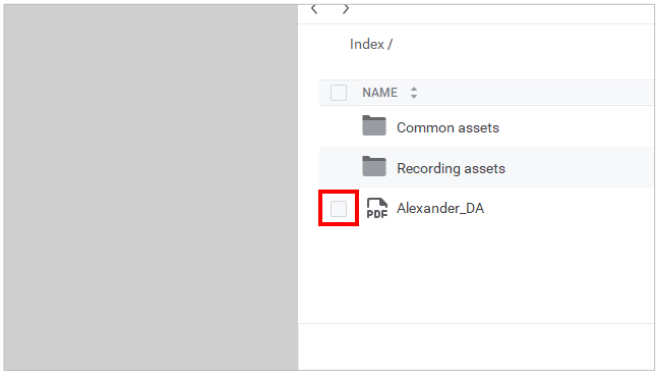


17.18.4. Do the same for the Danish (da-DK) asset.

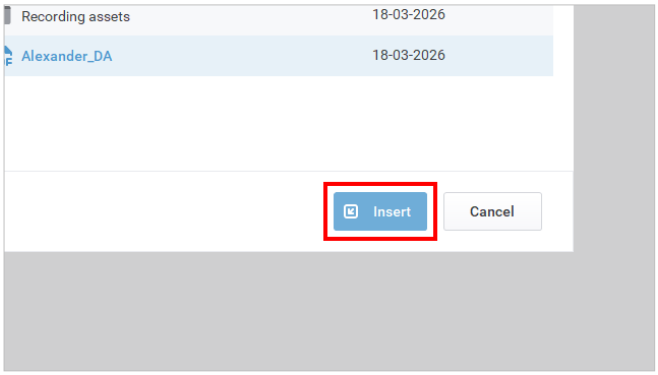
Find your Danish asset in the **Assets panel** and drag it into the grid.



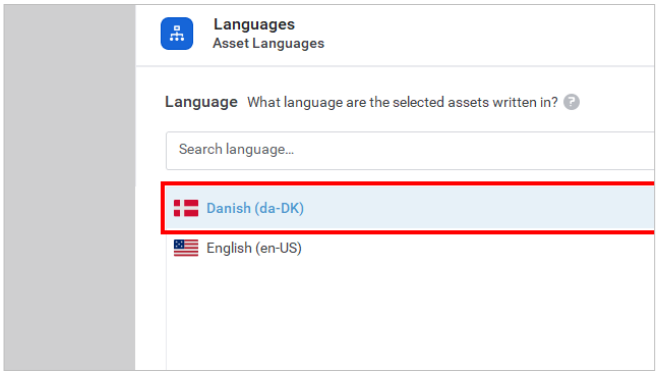
Check the **checkbox** next to the asset to select it.



Click on the button **Insert**

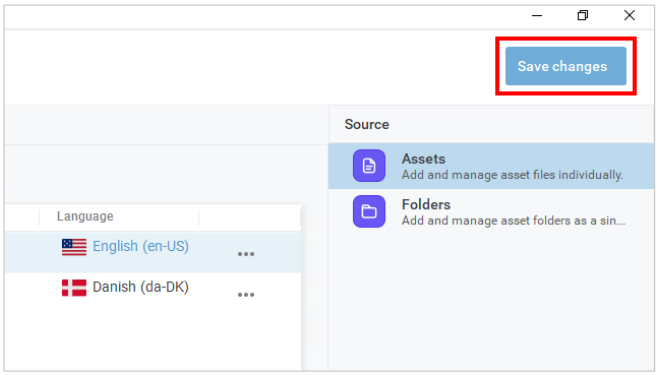


Click on the tree node **Danish (da-DK)**



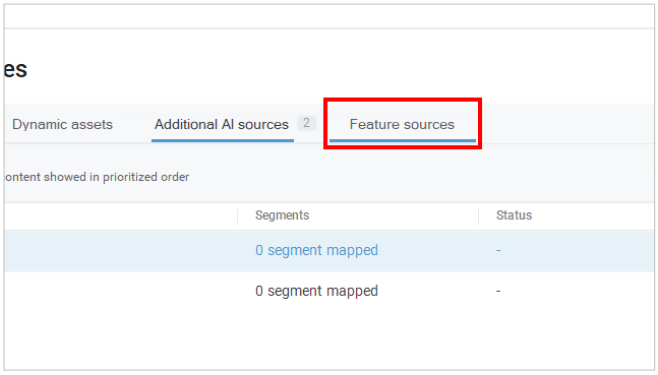
Click on the button **Save changes**

Note: This is the key step that makes AI chat language-aware. When you assign a PDF to English and a different PDF to Danish, the chat feature will only pull answers from the PDF that matches the user's language. So an English user and a Danish user can ask the same question and get answers from completely different source documents.

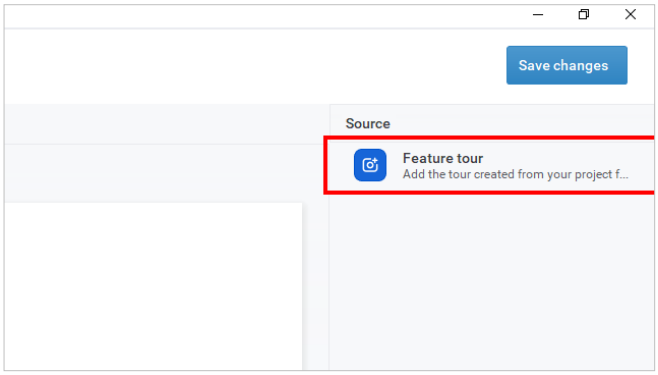


17.18.4.1. Adding Feature Sources

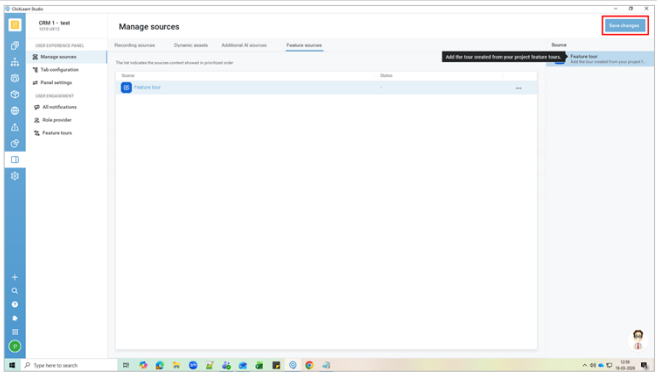
Click on the tab item **Feature sources**



Click and hold the left mouse button the node **Feature tour**



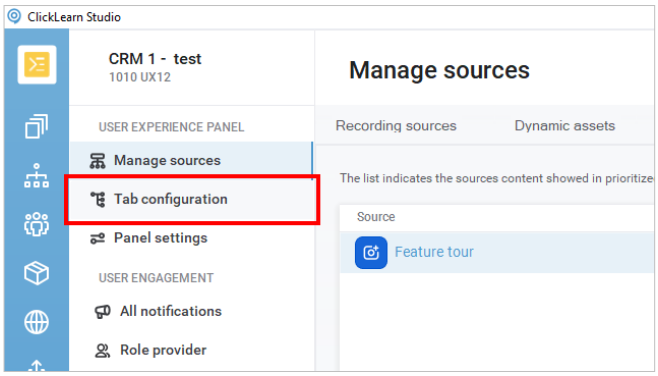
Click on the button **Save changes**



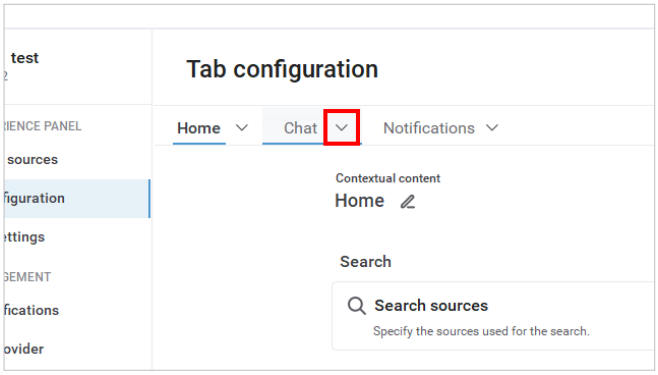
17.18.5. Set Up Tab Configuration Per Language

Tab configuration controls how the UXP panel looks and behaves for each language, what's in the chat, what recordings are shown, and where the AI pulls its answers from.

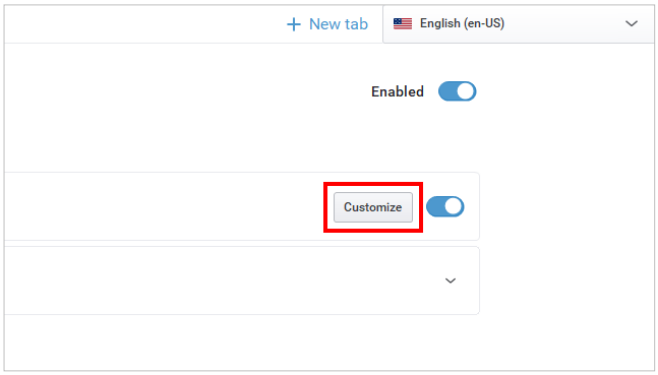
Click on the button **Tab configuration**



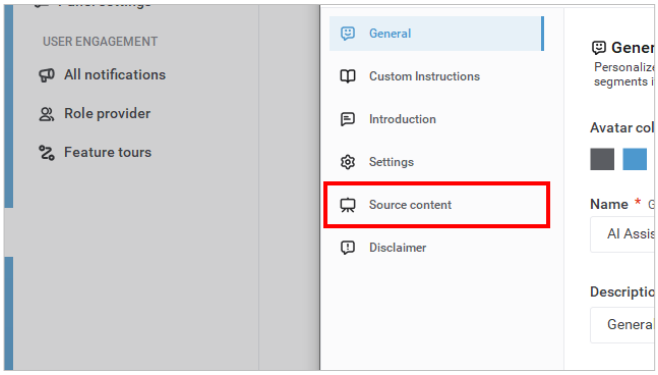
Click on the dropdown button of **Chat**



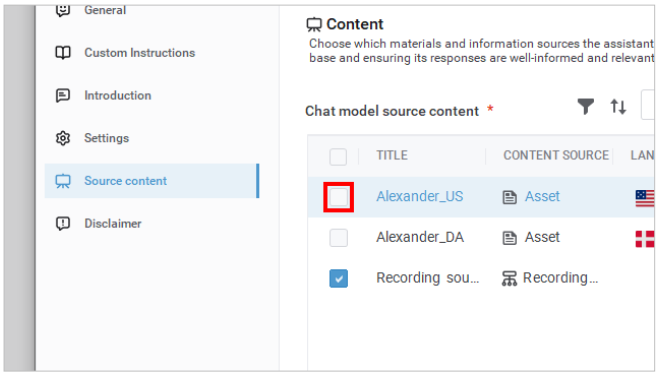
Click on the button **Customize**



Click on the button **Source content**

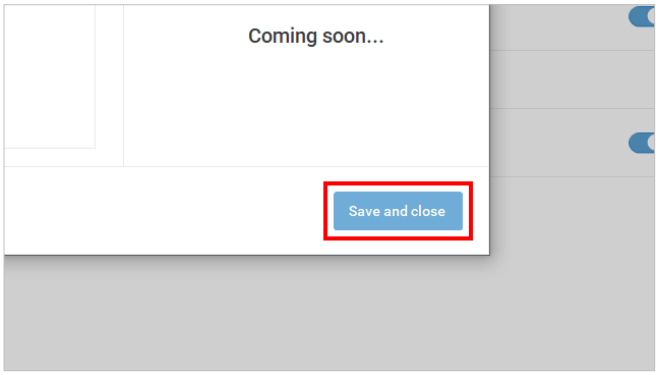


Click on the checkbox of grid cell **Select**



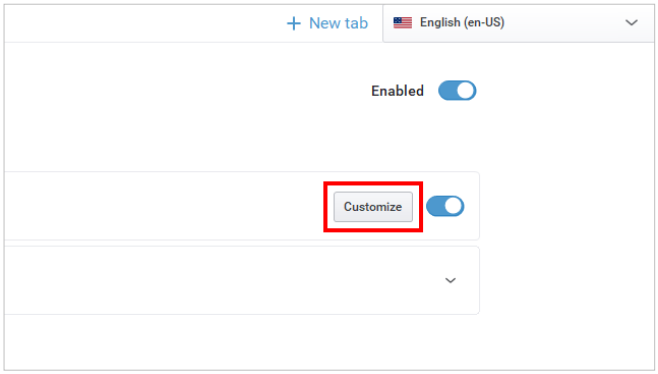
Click on the button **Save and close**

Note: - Now switch to the Danish language tab by clicking Danish (da-DK) in the language selector at the top of the Tab Configuration screen. Then do the same for the Danish language source:

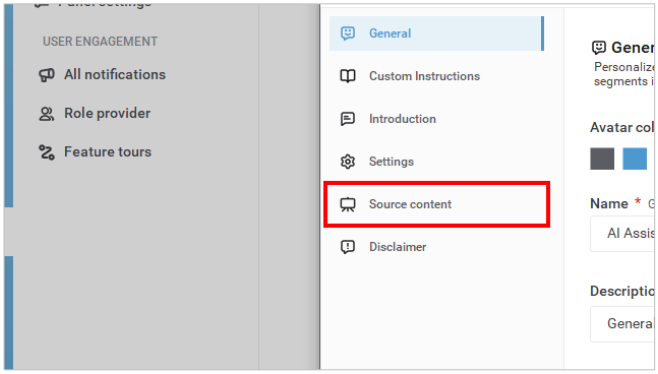


17.18.6. Do the same for Danish language source

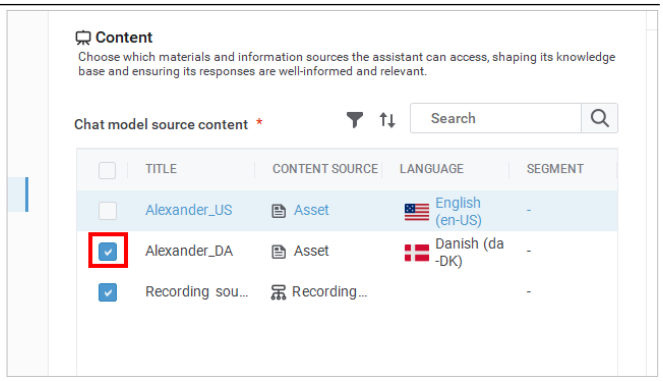
Click on the button **Customize**



Click on the button **Source content**

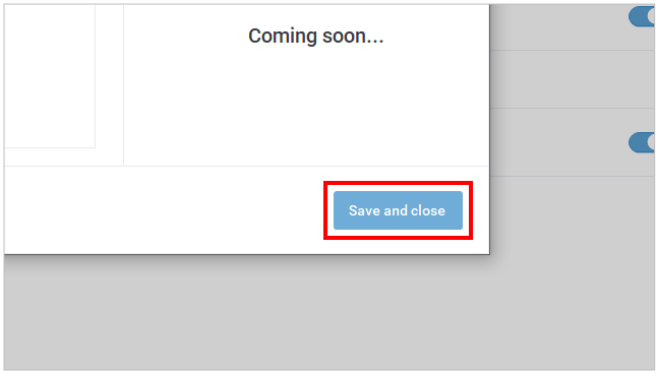


Click on the checkbox of grid cell **Select**



Click on the button **Save and close**

Note: You're essentially telling UXP's AI chat which document to read from per language. If you skip this step or select the wrong source, users might get answers in the wrong language or from the wrong content entirely.

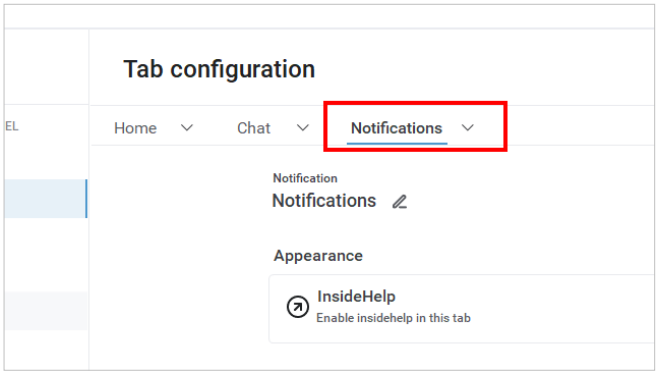


17.18.6.1. Set Up Notifications Per Language

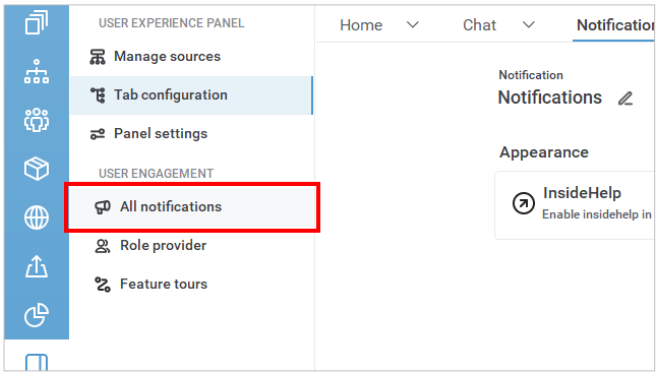
Notifications are the messages that pop up for your users inside UXP , things like welcome messages or announcements. Since you're working with multiple languages, you'll create separate notifications and use the Triggers setting to control which language sees which notification.

17.18.6.1.1. Set Up Notification for English (en-US)

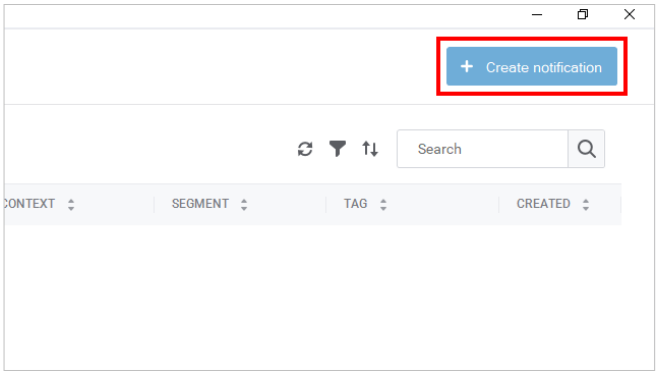
Click on the tab item **Notifications**



Click on the button **All notifications**

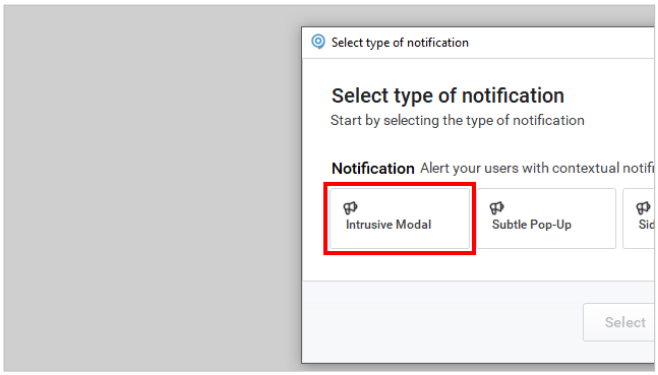


Click on the button **Create notification**

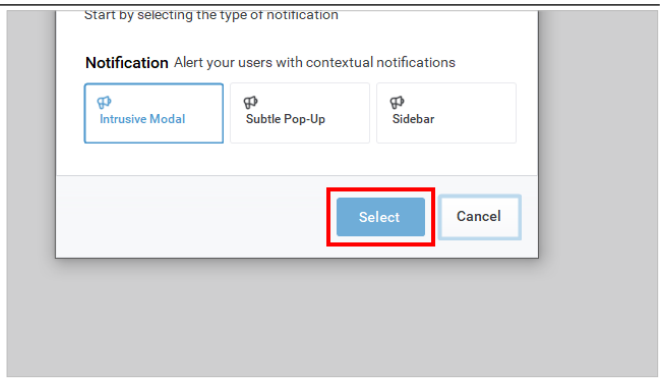


Click the **Intrusive Modal**.

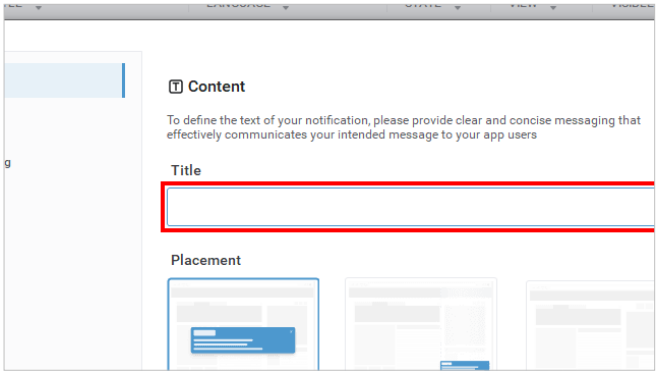
Optional: Choose a different notification type based on your preference.



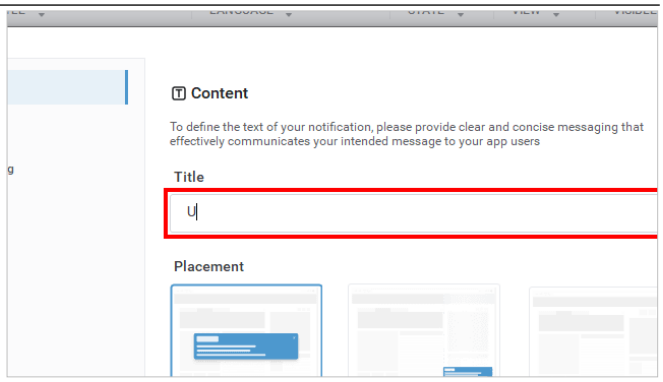
Click on the button **Select**



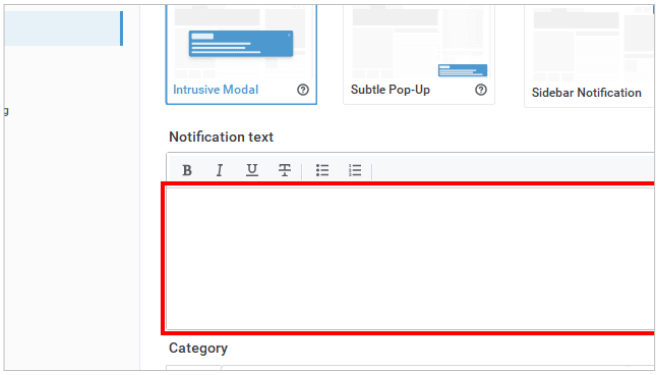
Click on the **Title** field and enter your title.



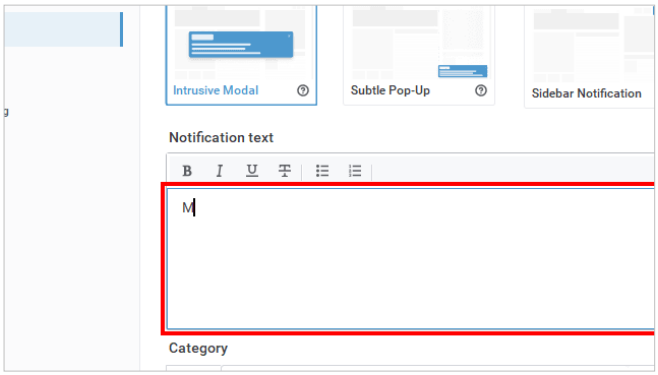
Enter **Title**.



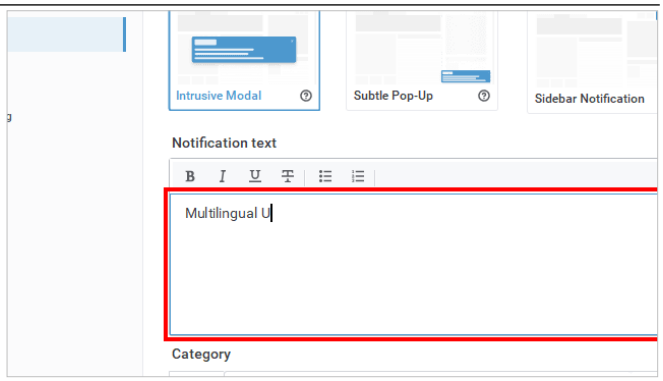
Click on the **Notification text** and enter your message.



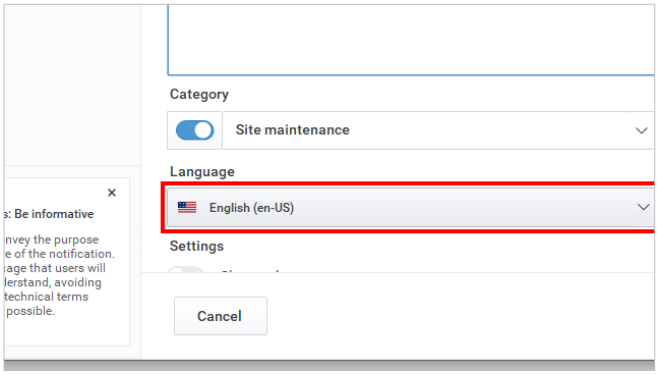
Enter **Content**.



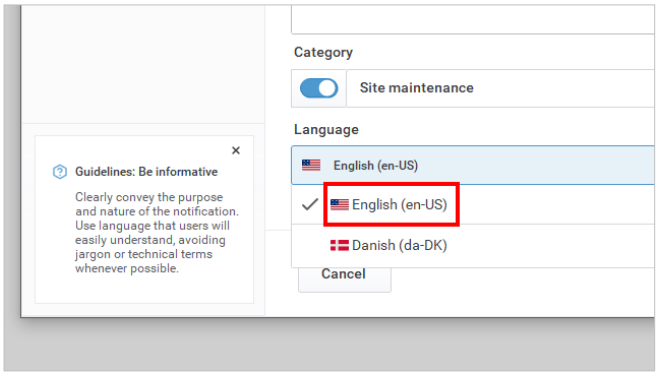
Enter **Content**.



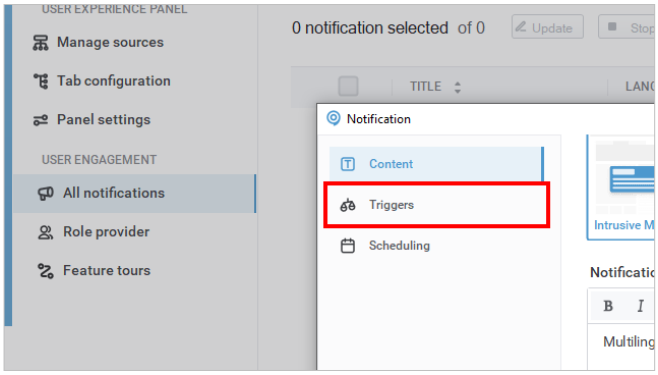
Click on the dropdown **Language**



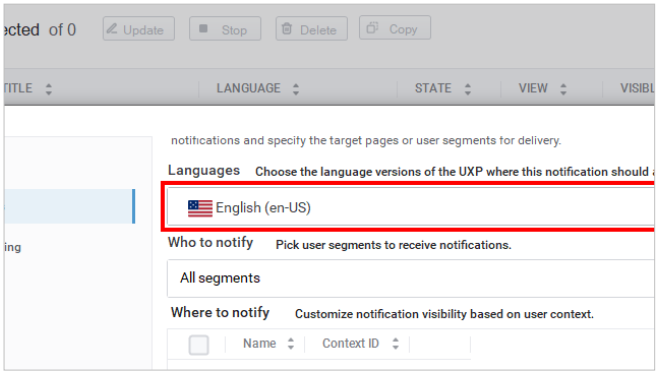
Click the Language dropdown and select **English (en-US)**.



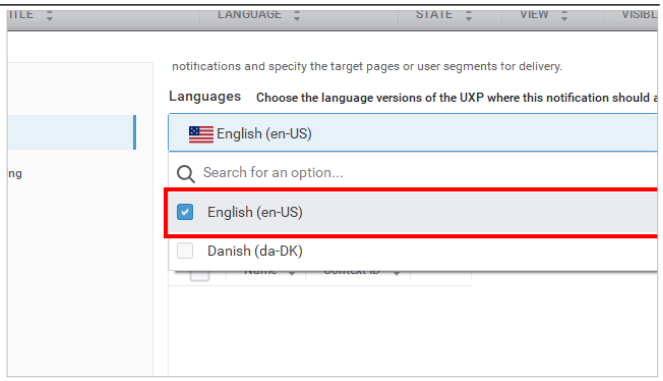
Click on the button **Triggers**



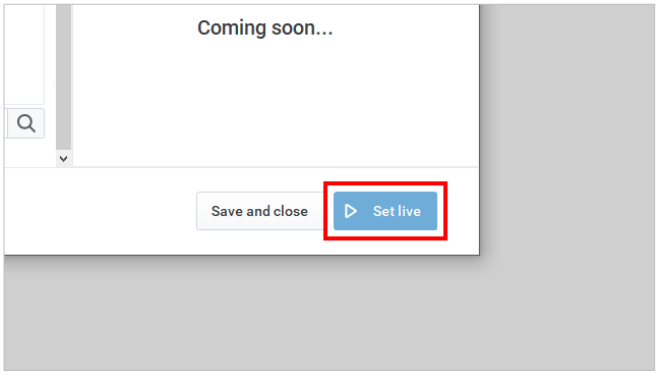
Click on the dropdown **Language**



Click the Language dropdown inside Triggers and select **English (en-US).**



Click on the button **Set live**



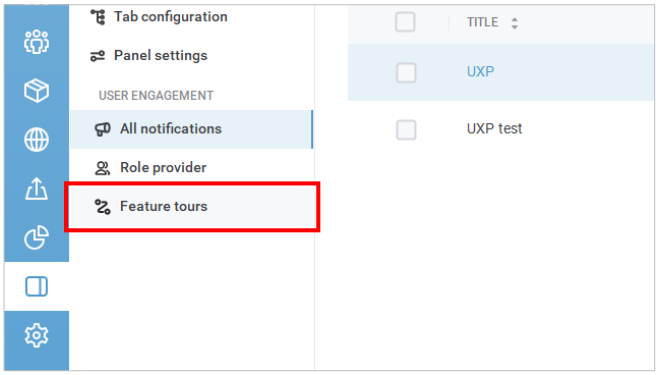
Follow the same steps to create a Danish Notification. Simply select Danish from the language dropdown and configure your triggers in that language. You are now ready to deploy live notifications to your Danish audience.

17.18.6.2. Set Up Feature Tours Per Language

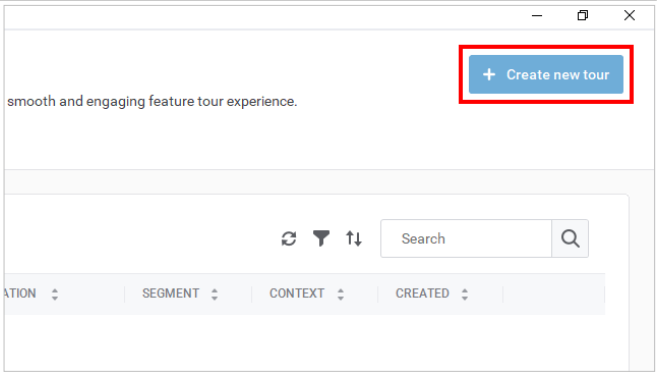
Feature tours are step-by-step guided walkthroughs that highlight specific elements in your business system. Just like notifications, you create a separate tour for each language and control visibility through language settings.

17.18.6.2.1. Creating a Feature Tour for the English Language

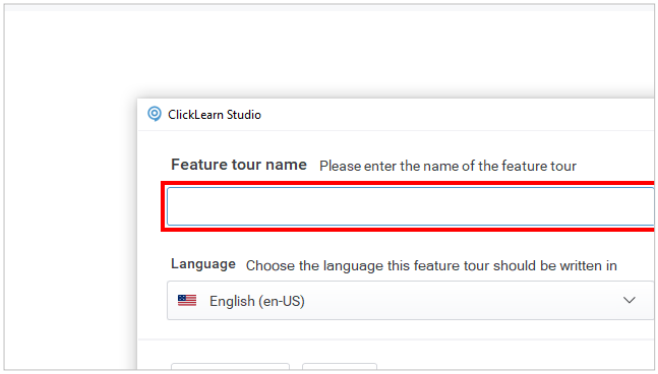
Click on the button **Feature tours**



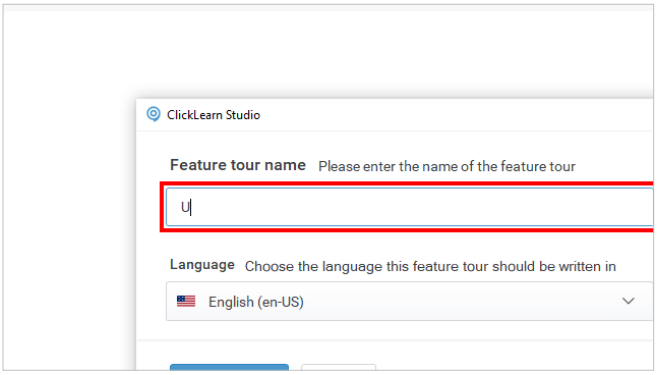
Click on the button **Create new tour**



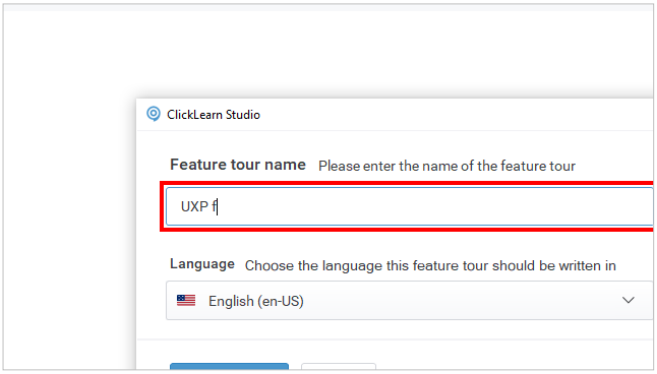
Enter a **name** for your tour in the text field.



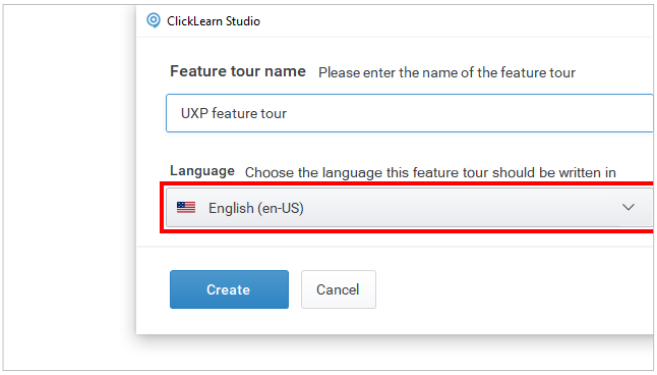
Enter **cc Txt Rename**.



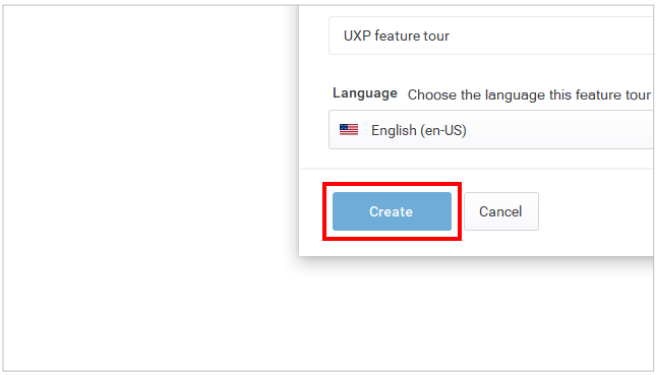
Enter **cc Txt Rename**.



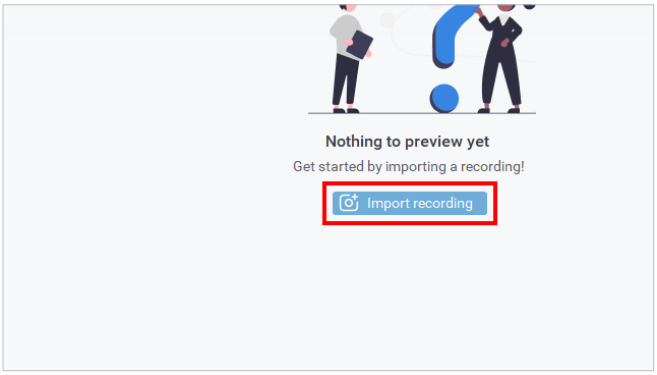
Click the Language dropdown and select your language **(English)**.



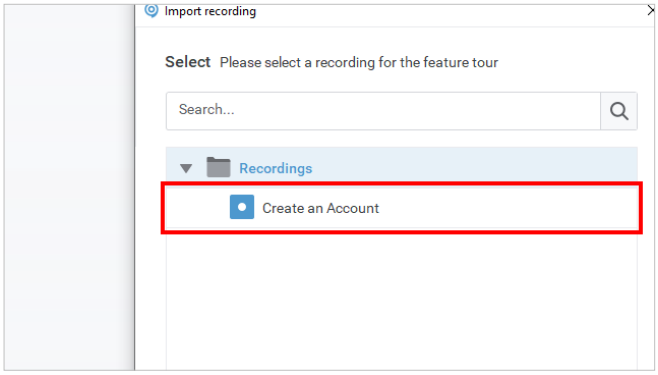
Click on the button **Create**



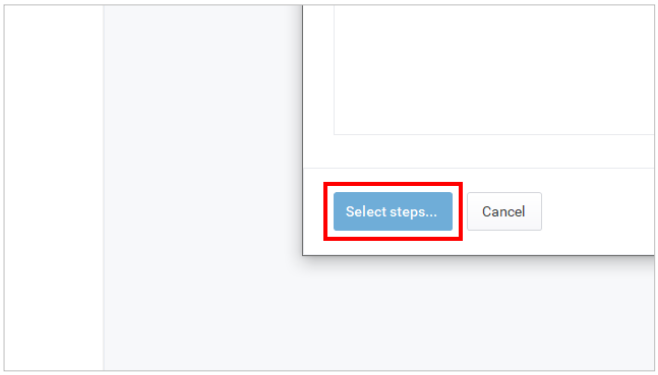
Click on the button **Import recording**



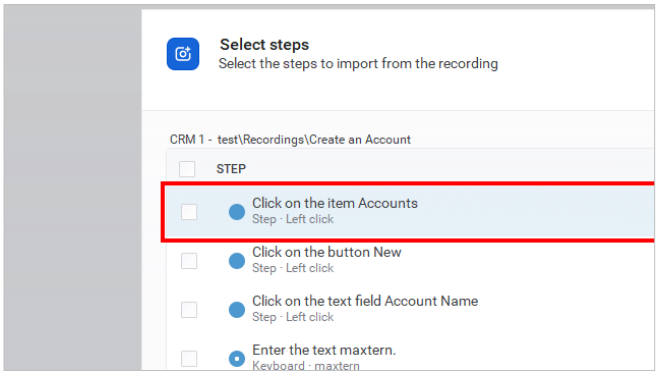
Click on the tree node **Create an Account**



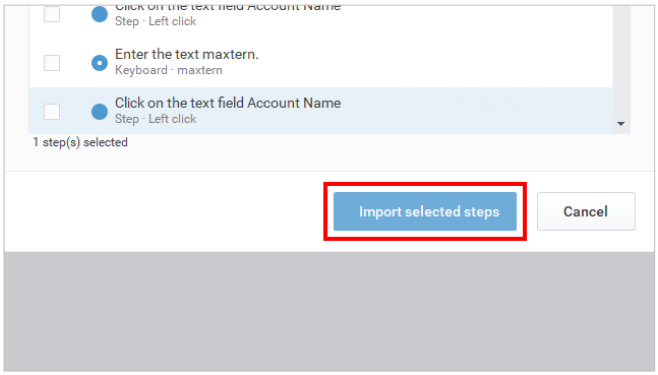
Click on the button **Select steps...**



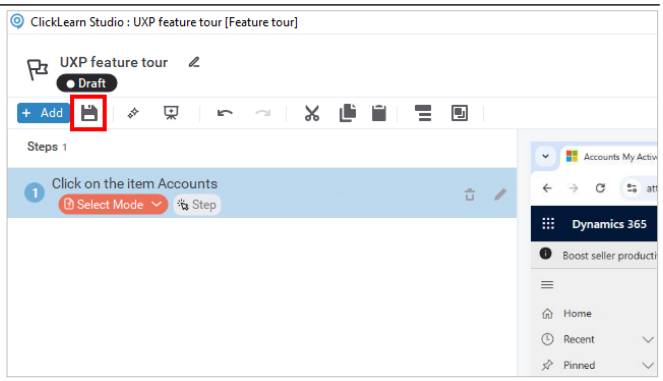
Check the step you want to include in this tour (for example, "**Click on the item Accounts"**).



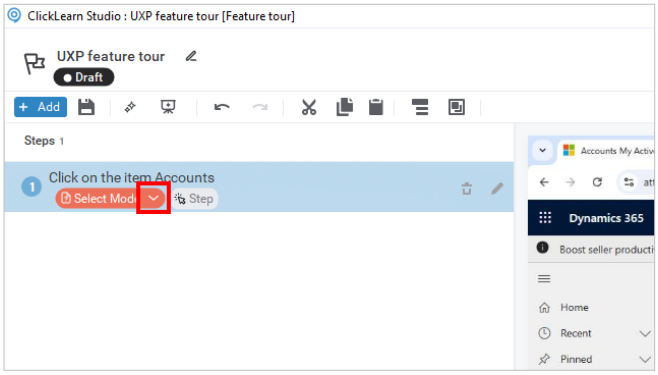
Click on the button **Import selected steps**



Click on the button **Save (Ctrl+ S)**

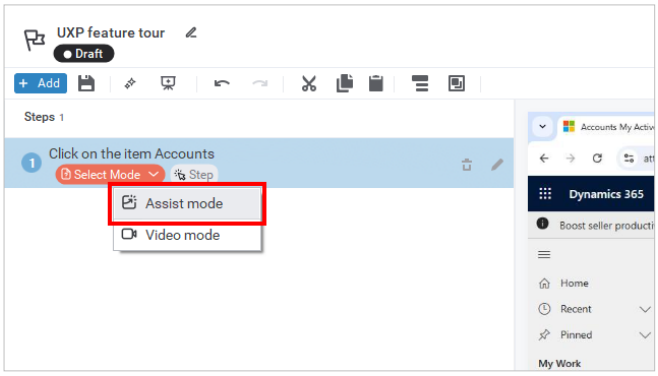


Click the **display type icon** on the step.

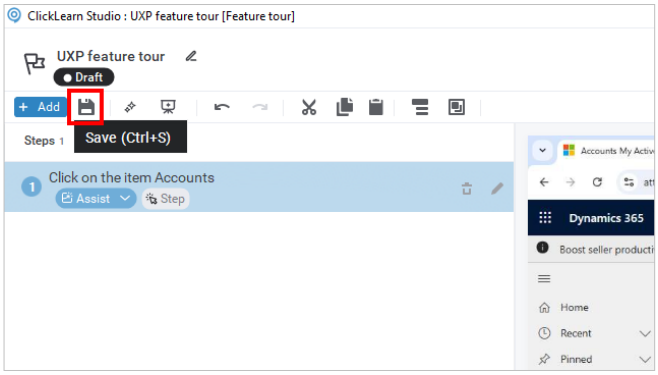


Click on the menu item **Assist mode**

Note: Assist Mode walks the user through each step interactively inside the business system, highlighting what to click as they go. This is generally more useful than Video Mode for guided tours because the user is actively doing the task, not just watching it.

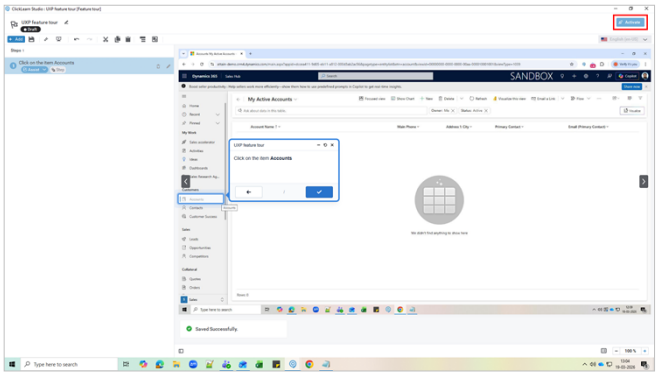


Click on the button **Save (Ctrl+ S)**

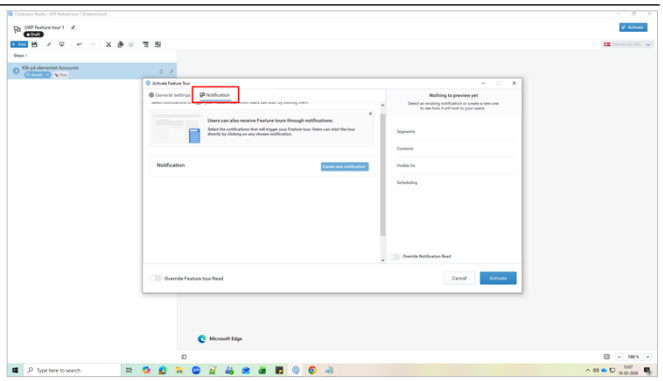


Now activate the tour and attach a notification to it:

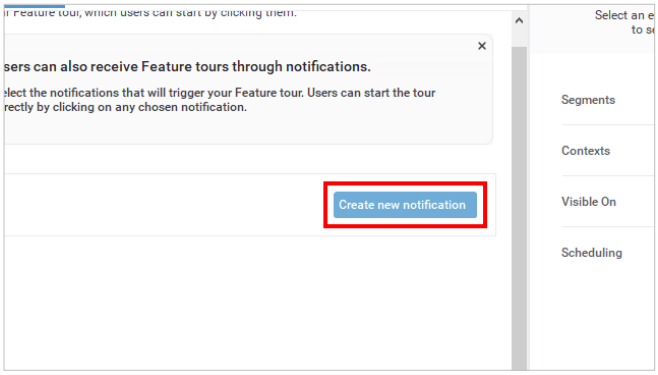
Click on the button **Activate**



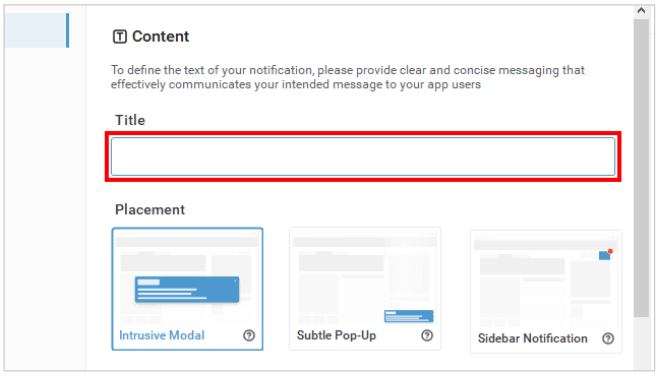
Click on the tab item **Notification**



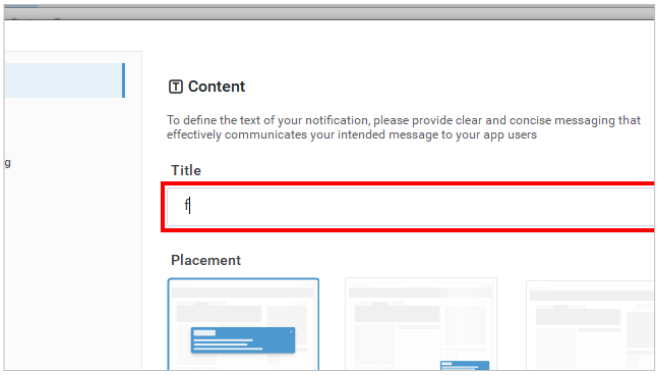
Click on the button **Create new notification**



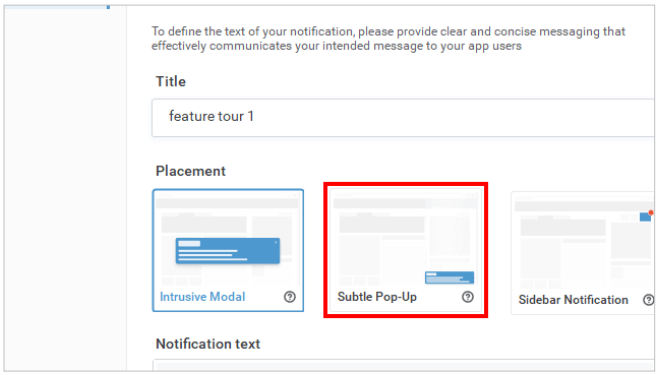
Click on the textbox **Title**



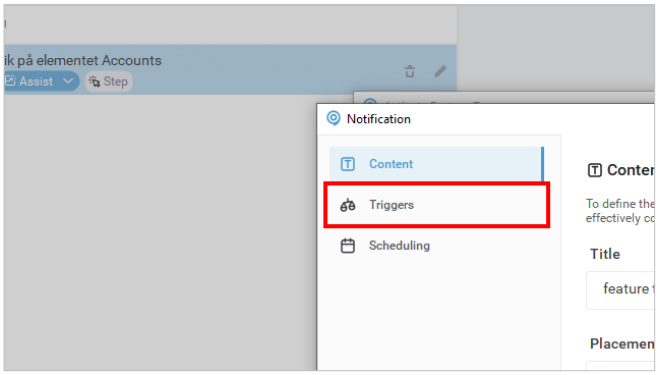
Enter **Title**.



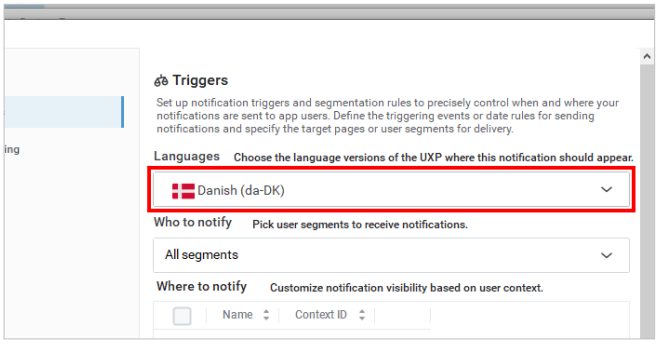
Click on the item **SubtlePopup** as the notification style.



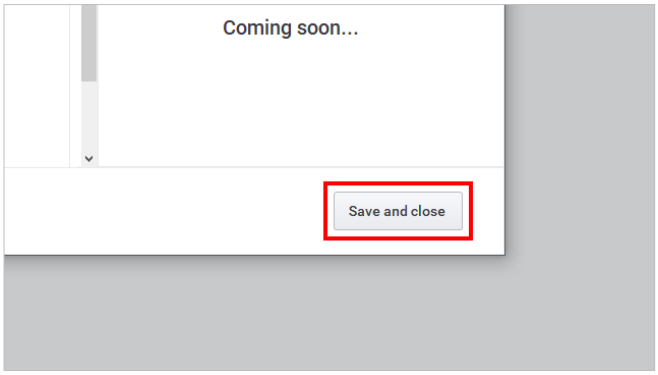
Click on the button **Triggers**



Click the Language dropdown and select your language.

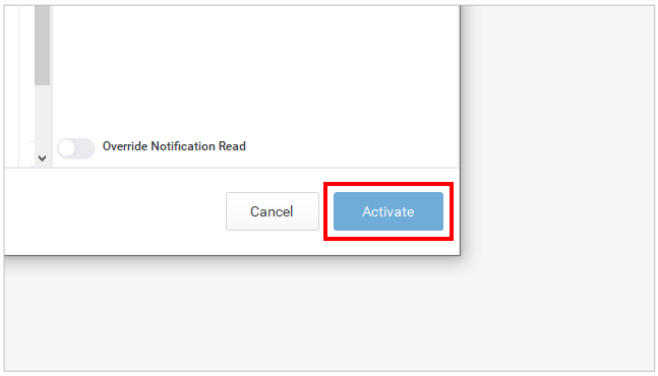


Click on the button **Save and close**



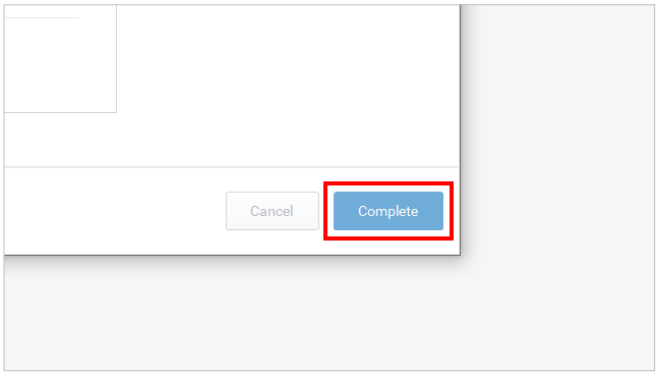
Click on the button **Activate**

Similarly, you can create a Feature Tour in Danish. Simply select Danish from the language dropdown and follow the same configuration steps used for the English version

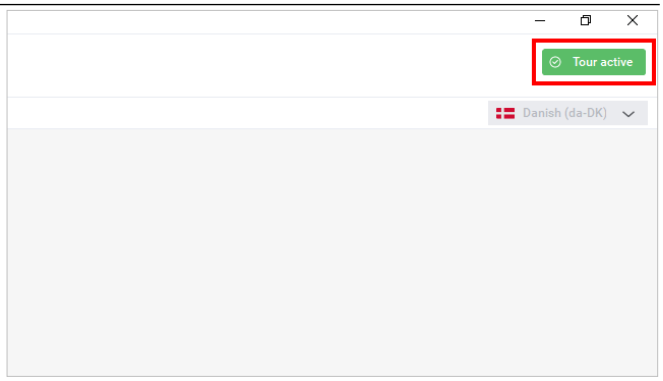


Click on the button **Complete**

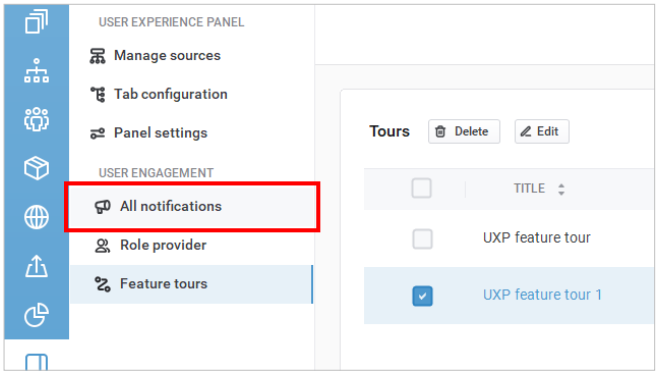
Once both tours are set up, click Tour Active and then go to All Notifications to review everything. You'll be able to see each feature tour notification listed with the language it's configured for.



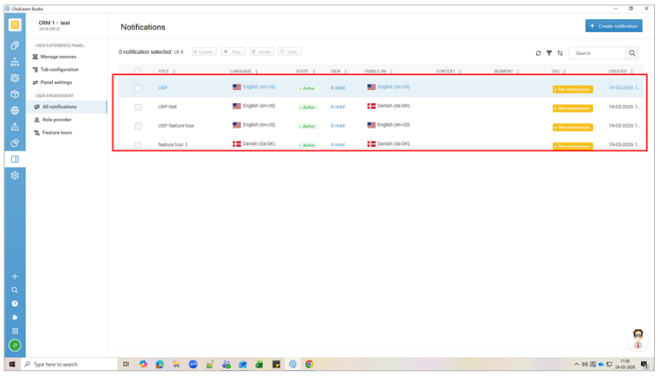
Click on the button **Tour active**



Click on the button **All notifications**



Now you can go back to notifications and see what language you've set it up in feature tours. And you can see the selected is a feature tour notification in Danish.



17.18.6.3. Troubleshooting

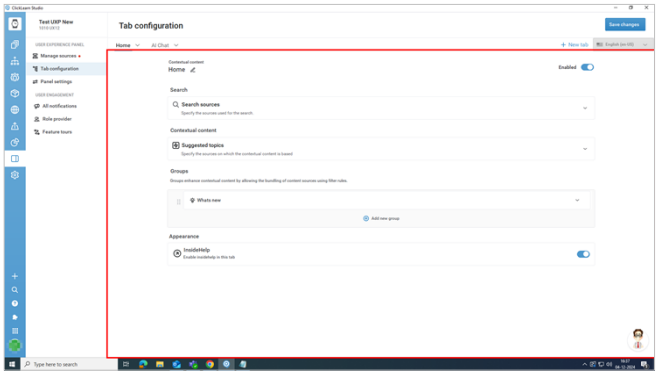
- **My notification isn't showing in Danish**. Check that you've set the language in both the notification itself and inside the Triggers setting. Both need to be set to Danish for it to show correctly.
- **My chat is pulling answers from the wrong language**. Go back to Tab Configuration, switch to the affected language tab, and confirm the correct source is selected under Source Content.
- **The toggle for UXP isn't visible**. Your account may need it enabled. Contact support@clicklearn.com
- **My feature tour isn't appearing for the right language**. Check the Triggers setting on the tour's notification and confirm the correct language is selected there.

Once everything is configured, UXP handles the rest automatically. You distribute a single link to all your users. Based on their business system language, UXP adapts and displays everything, recordings, chat responses, notifications, and feature tours in that language. No switching, no separate links, no extra steps for your users.

What's Next: Now that your multi-language UXP is set up, you can test it by switching the language in your business system and opening UXP to confirm everything appears correctly in each language. You can also explore adding more languages, updating your source PDFs, or creating additional feature tours as your content grows.

17.19. UXP Best Practices

Get the configuration, sources, and segment mapping right from the start, so your UXP panel serves exactly the content you intend to the right users the first time you publish.



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.

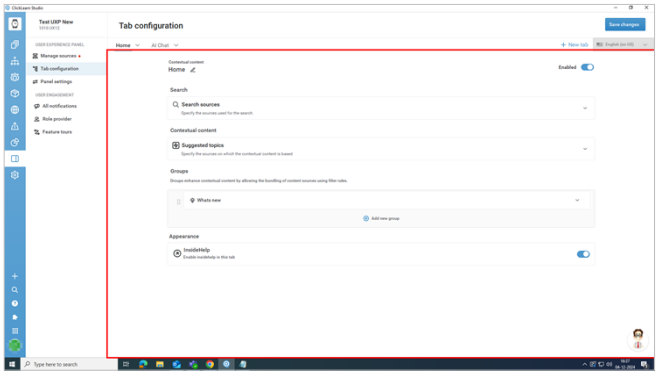
Browser: We recommend you restart your browser before using the User Experience Panel.

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.

17.20. UXP Limitations

Know the boundaries of the UXP panel before you build, so you plan around subscription needs, publish-and-restart cycles, and role-update refreshes instead of hitting them by surprise.



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.

- You cannot use ClickLearn UXP and Click Assist extensions both at the same time. To use the ClickLearn UXP extension, you must disable/off ClickLearn Assist from the web store.

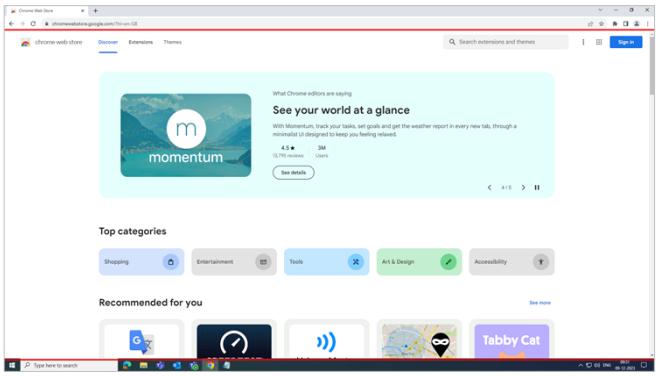
17.21. Deploy and Configure UXP

Enable in-app guidance in your browser without waiting for an IT deployment; useful for authors testing UXP before rolling it out organisation-wide.

17.21.1. Steps to install ClickLearn UXP Extension

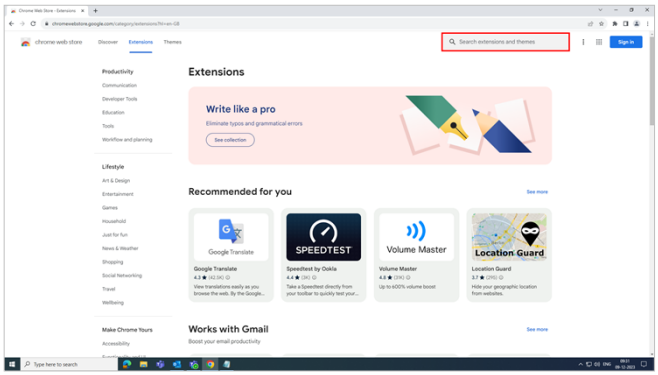
To install the ClickLearn UXP Chrome extension, follow the steps listed below.

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

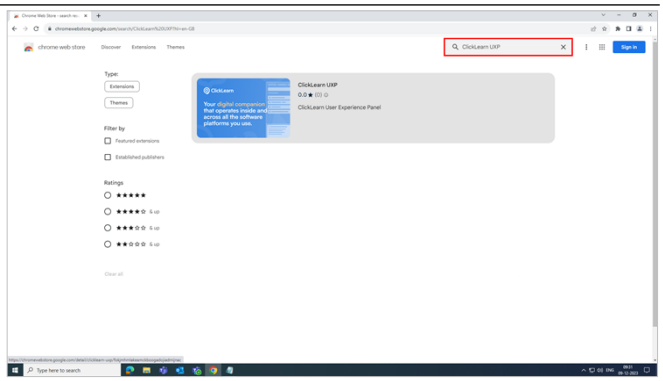


Following are the steps for the Google Chrome browser; you can follow the same steps for Microsoft Edge.

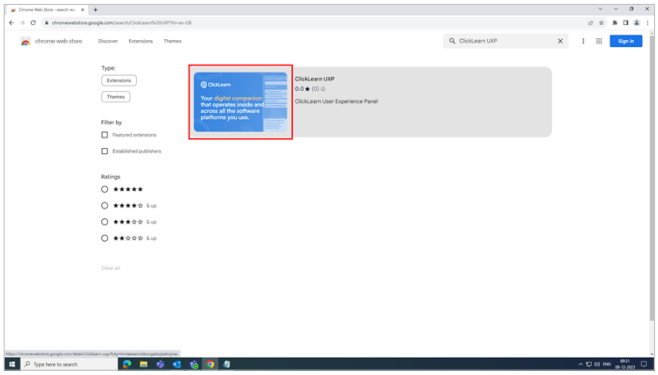
Click on the **search box**.



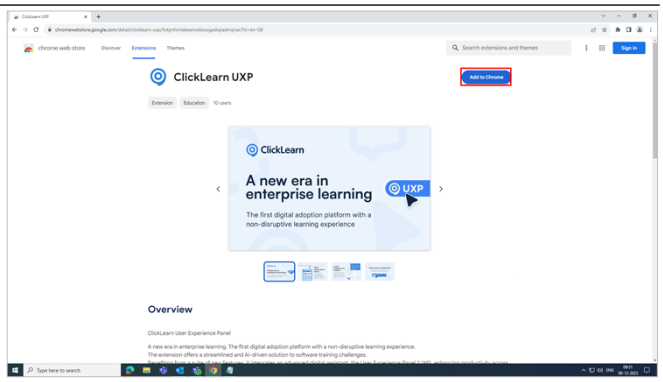
In the search box, type **ClickLearn UXP**.



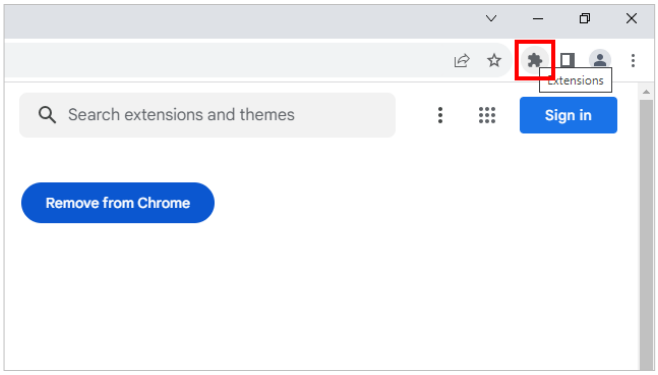
Click on the **UXP**.



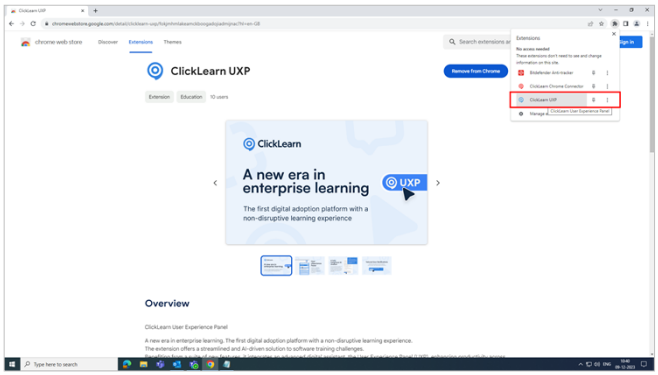
Click on the button **Add to Chrome**.



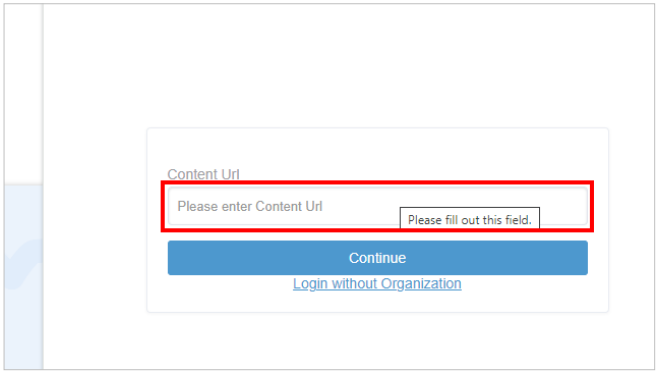
Click on **Extensions**.



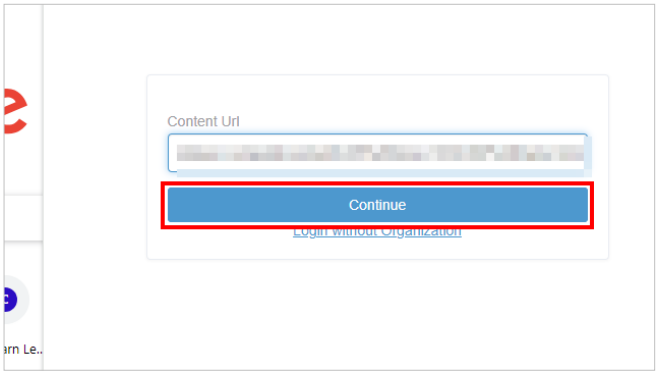
From the extensions, select **ClickLearn UXP**.



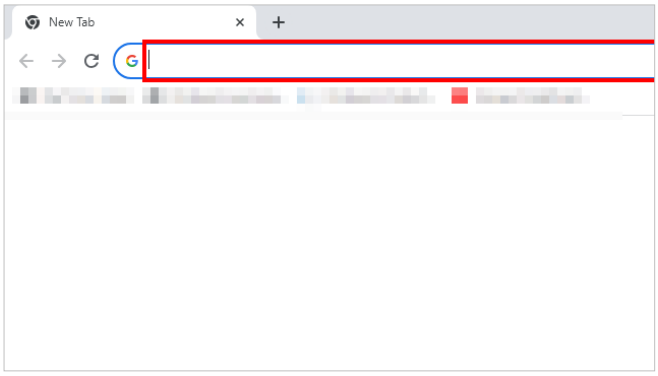
Click on the input field. **Please enter the content URL**.



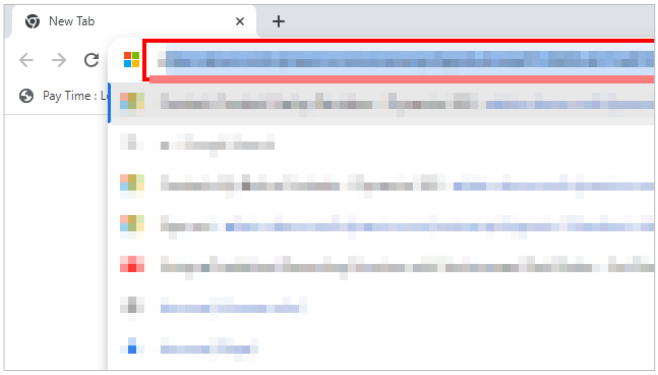
Here, you need to enter the content URL from the publication page. Copy and paste the content URL and click on the button **Continue**.



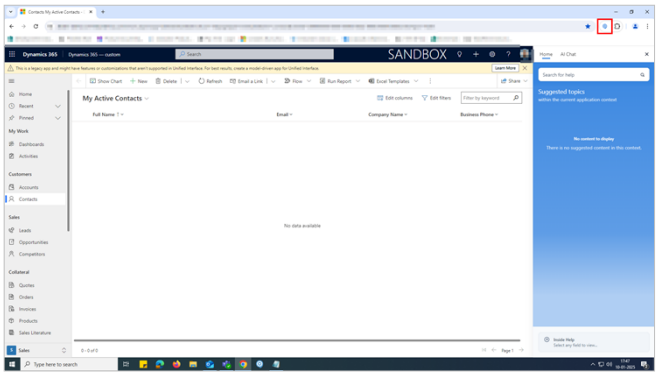
Click on the input field **Address and search bar**.



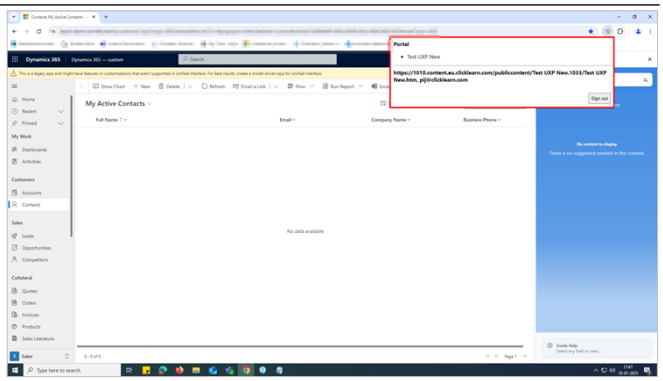
Enter the URL of the application.



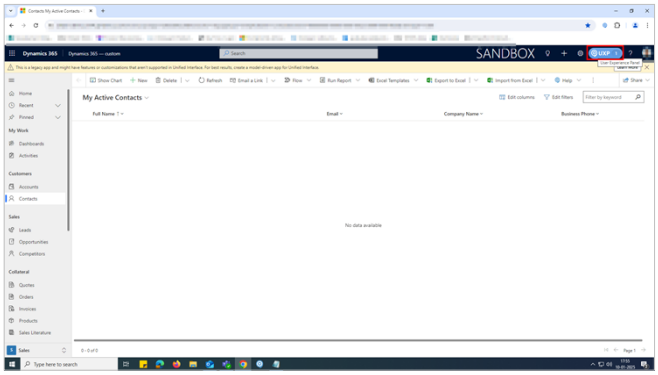
Click on **ClickLearn User Experience Panel**.



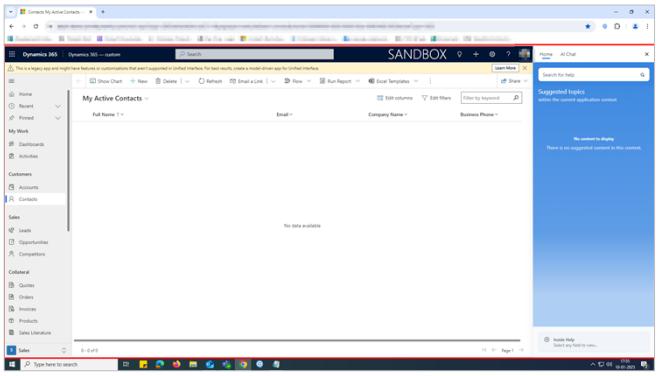
When you click on the UXP icon, a new pop-up will appear showing the URL of the currently published project.



Click on the group **UXP**.



The UXP appears next to the application.



17.22. Deploy UXP via GPO

Enable in-app guidance for all end-users.

17.22.1. 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

Follow the below mentioned steps for installing it as a group policy:

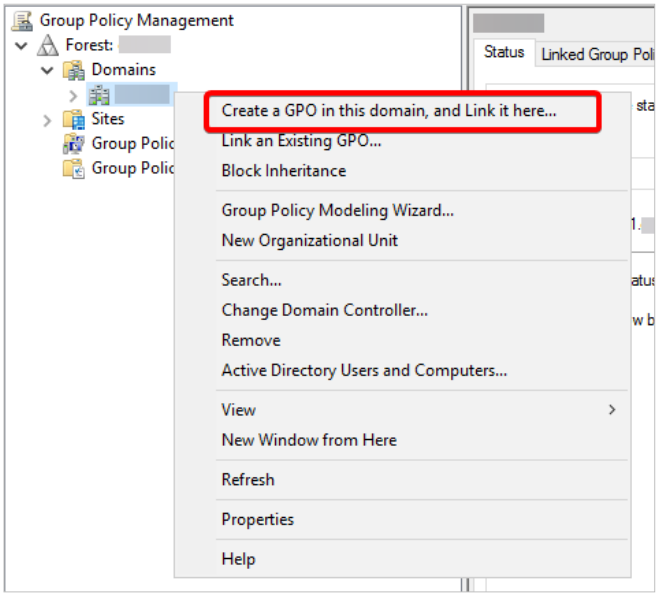
Edit the .bat file in a text editor of your choice (for example, Notepad or Visual Studio Code). Then update it as follows:

1. Locate the line where you need to put your content URL.

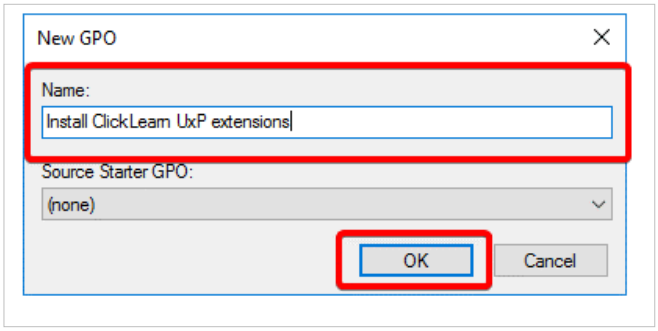
2. Copy the content URL from the studio and add it to the line located make sure its decoded ie it should not contain "**%20**".

3. Save the file
Refer to screenshot for an example of how the edited file should look. In the screenshot, the URL points to producut documentation; in your case, use your own content URL.

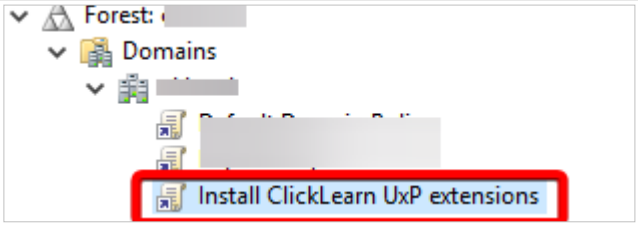
Go to the active directory server. Open the "**Group Policy Management**." Right-click on your domain directory. Click "**Create a GPO in this domain, and Link it here**."



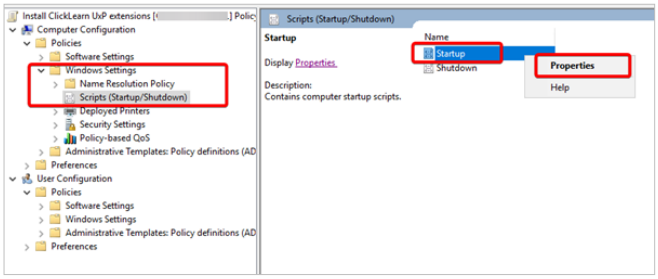
Later, a pop-up appears wherein you must fill in the value as per the given name, "**Install ClickLearn UxP extensions**." Click on the **OK** button.



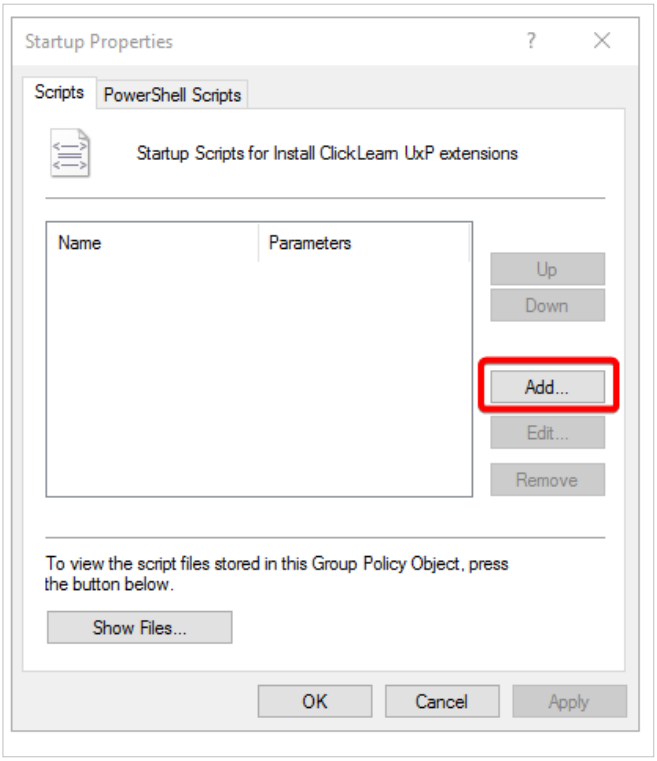
Once you click the OK button, the screen looks something like this.



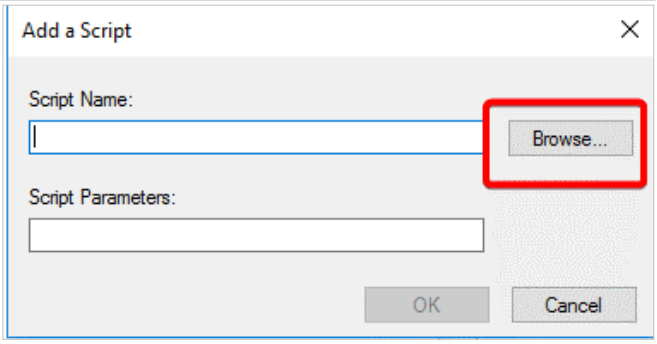
Expand Windows Settings, right-click on the policy, and click Edit. The screen looks something like this.



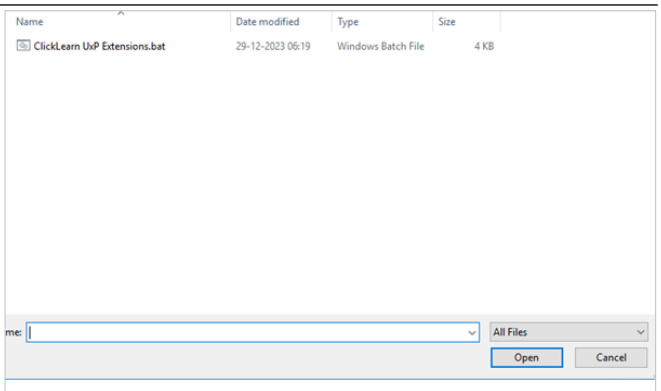
Click on the button **Add**.



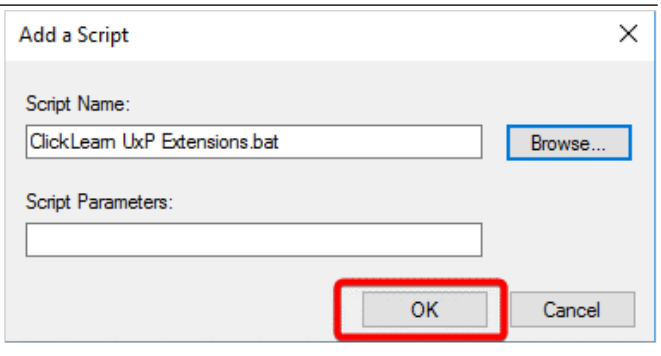
Click on the button **Browse**.



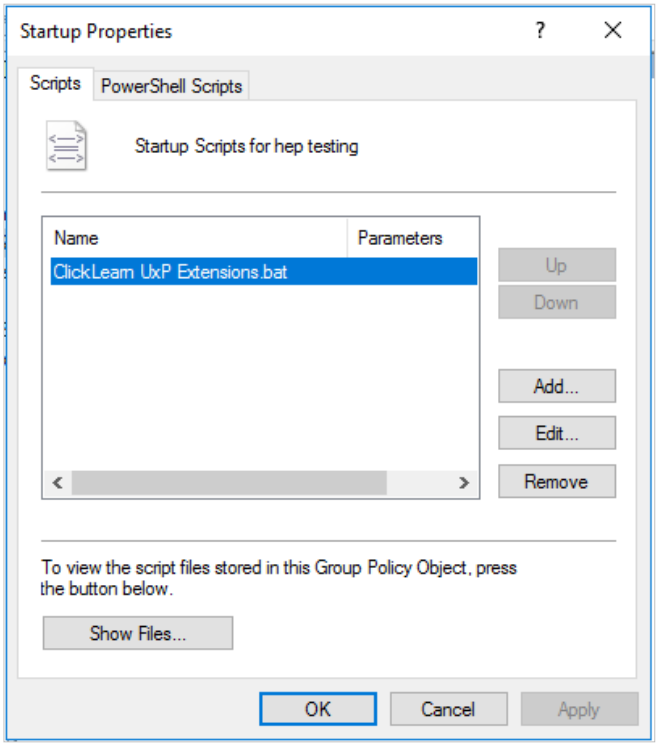
Copy the file you downloaded in the first step and paste it into the folder you opened from the browse option. Choose the file and open it.



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.

17.23. Deploy UXP via Microsoft Intune

Deploy in-app guidance to every managed device automatically, so users get contextual help from day one without any per-device configuration.

17.23.1. Introduction

This guide explains how to deploy the ClickLearn UXP Extension to Windows devices using a PowerShell script through Microsoft Intune. Once set up, the extension installs automatically on all devices in your selected group no manual action needed from users.

17.23.2. Requirements

Check these before you start:

- Devices are enrolled in Microsoft Intune
- Users or devices are part of an Azure AD group
- You have admin access to the Intune portal
- You have tested the script on at least one device locally

17.23.3. Step 1: Download the Script

Download the PowerShell script here:
Deployment Script
Save it somewhere easy to find on your computer.

17.23.4. Step 2: Update the Script

Before uploading the script to Intune, you need to update two parameters. For that, first open the .ps1 file in Notepad or any text editor.

17.23.4.1. Content URL

$ContentUrlSchema = "https://your-content-url"

$ContentUrlSchema contains the ClickLearn Content URL that the extension will use. Replace the example value with your own Content URL and ensure the URL remains enclosed in quotation marks (").

The script includes the ClickLearn Product Documentation URL as a placeholder. Replace this URL with the Content URL for your own ClickLearn content URL.

Example:
$ContentUrlSchema = "https://yourtenant.content.eu.clicklearn.com/publiccontent/YourContent.1033/YourContent.htm"

This URL is displayed in the extension and is used as the default content location for users. Depending on the **IsAllow** setting, users may either be able to view the URL only or edit it themselves.

17.23.4.2. User Permission (IsAllow)

$IsAllow = $false

The IsAllow setting determines whether users can manage the Content URL themselves.

17.23.4.2.1. False

When set to $false

$IsAllow = $false

Users are restricted to the Content URL configured by the administrator.

- The Content URL is displayed as read-only.
- Users cannot sign out of the extension.
- The Back link on the login page is disabled.
- A "**Managed by your administrator**" message is shown for restricted actions.

Use this setting when all users should access the same ClickLearn content and should not be able to switch to another environment.

17.23.4.2.2. True

When set to $true

$IsAllow = $true

Users have more control over the extension.

- Users can sign out of the extension.
- Users can change the Content URL from the login page.
- Users can switch between different ClickLearn environments configured for UXP.

Use this setting when users need access to multiple ClickLearn environments or during testing and validation activities.

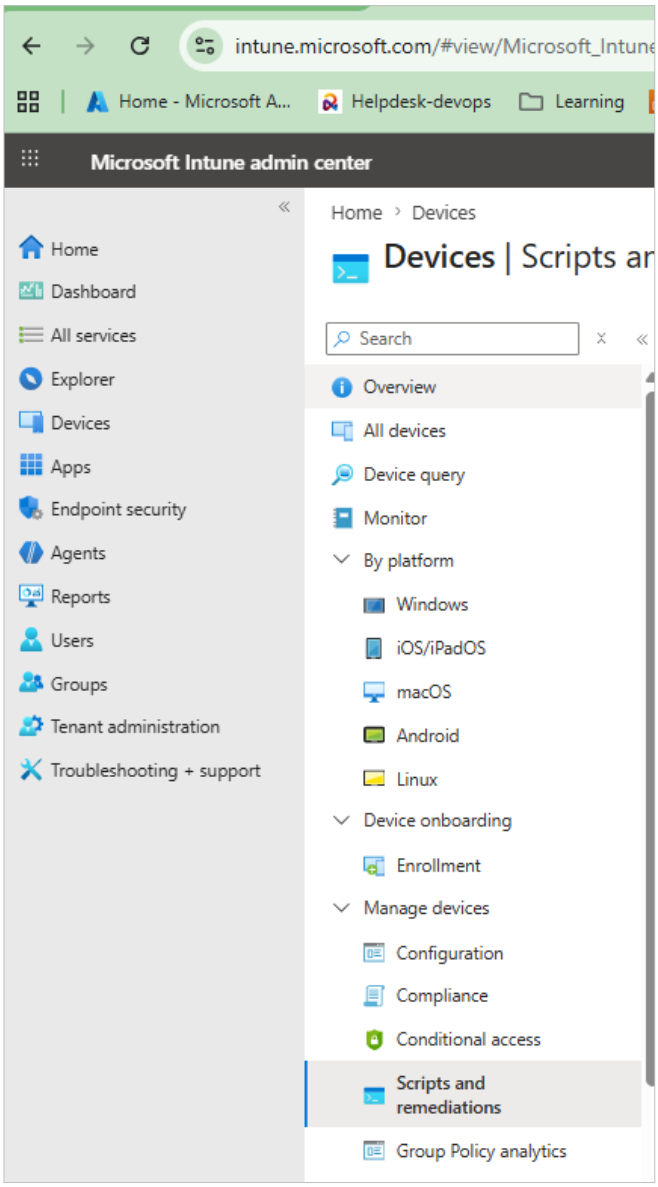
Important: Enter $true or $false exactly as shown, including the $ sign and without quotation marks.

17.23.5. Step 3: Sign In to Intune

- Open browser
- Go to: https://intune.microsoft.com and and sign in with your admin account.

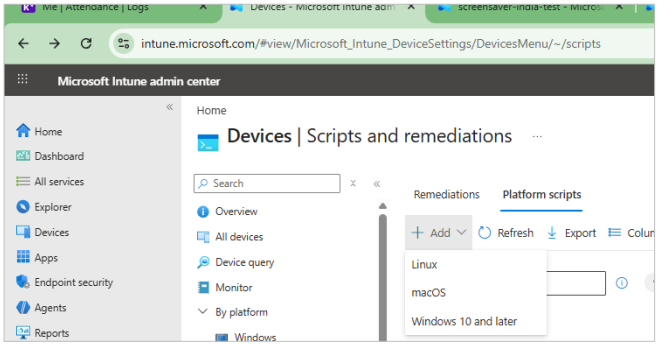
17.23.6. Step 4: Go to Platform Scripts

- Click Devices in the left menu
- Click Scripts and remediations
- Click Platform scripts



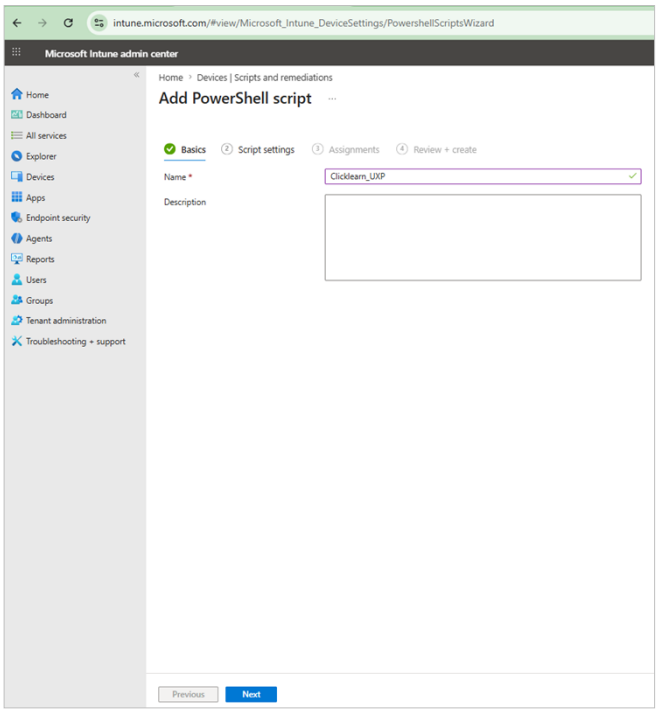
17.23.7. Step 5: Add a New Script

- Click + Add
- Select Windows 10 and later



17.23.8. Step 6: Fill In the Basic Details

- Name: ClickLearn_UXP
- Description: Optional - You can leave this blank or add a short note.
- Click Next.



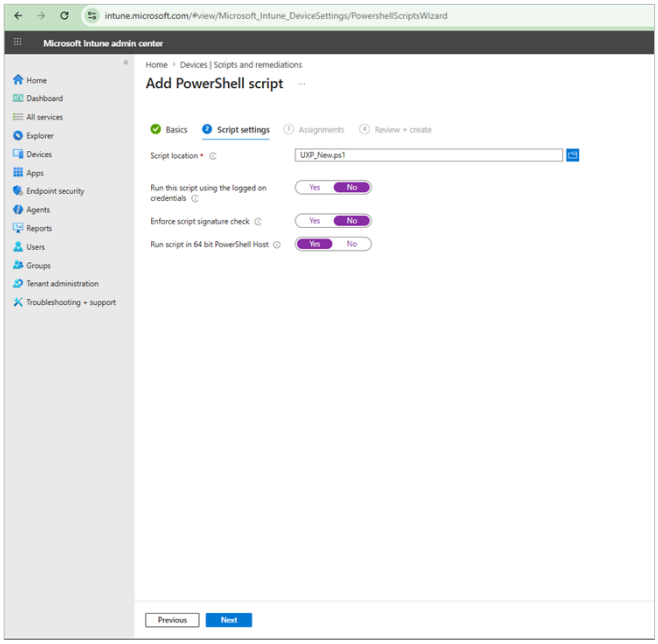
17.23.9. Step 7: Upload the Script and Set the Options

Upload the .ps1 file you updated in Step 2.

Set these options exactly as shown:

Setting	Value
Run this script using logged-on user credentials	No
Enforce script signature check	No
Run script in 64-bit PowerShell host	Yes

Click **Next**.

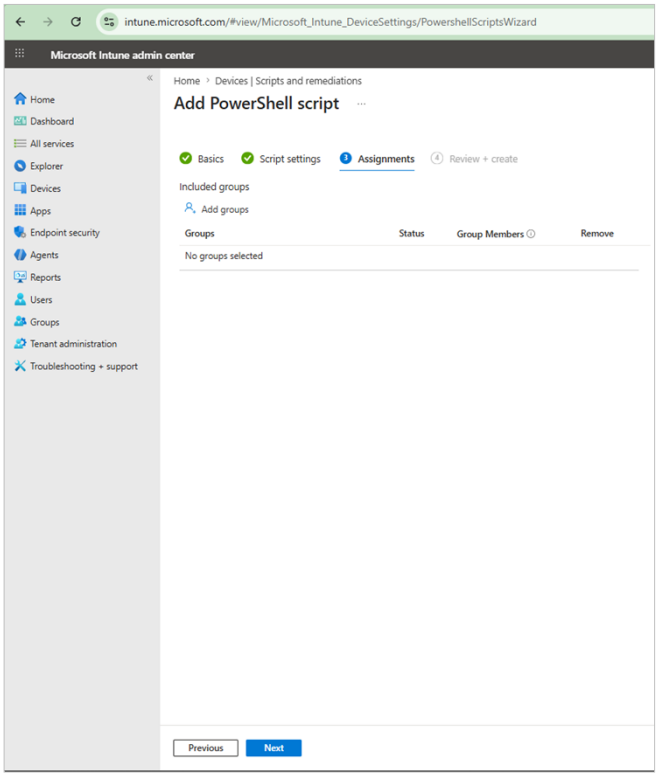


17.23.10. Step 8: Assign to a Group

- Click Add groups

Choose your target group:
Use a User group if you want the extension to follow users across devices

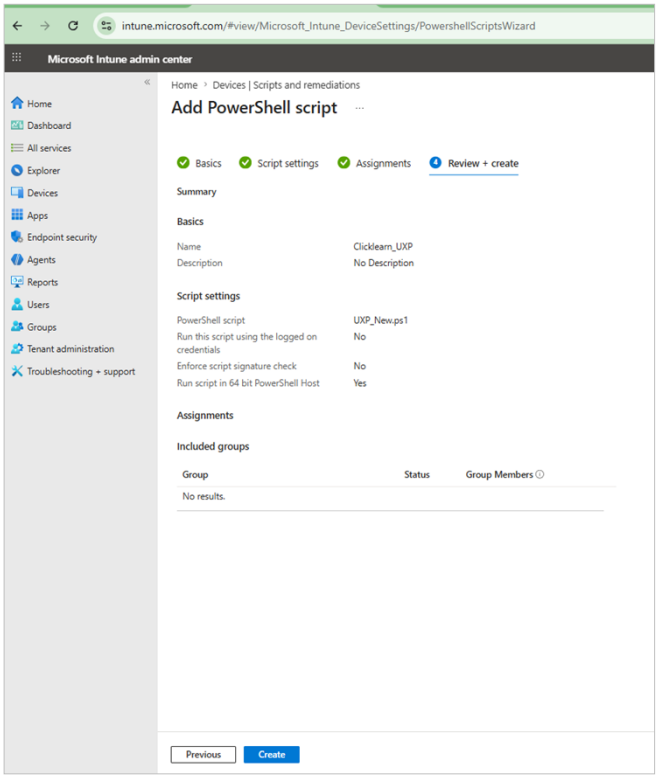
- Use a Device group if you want it installed on specific machines regardless of who logs in
- Click Select, then click Next



17.23.11. Step 9: Create the Deployment

Review your settings and click Create.

Intune will start rolling out the script. It can take up to 8 hours for all devices to receive it, depending on when they check in.

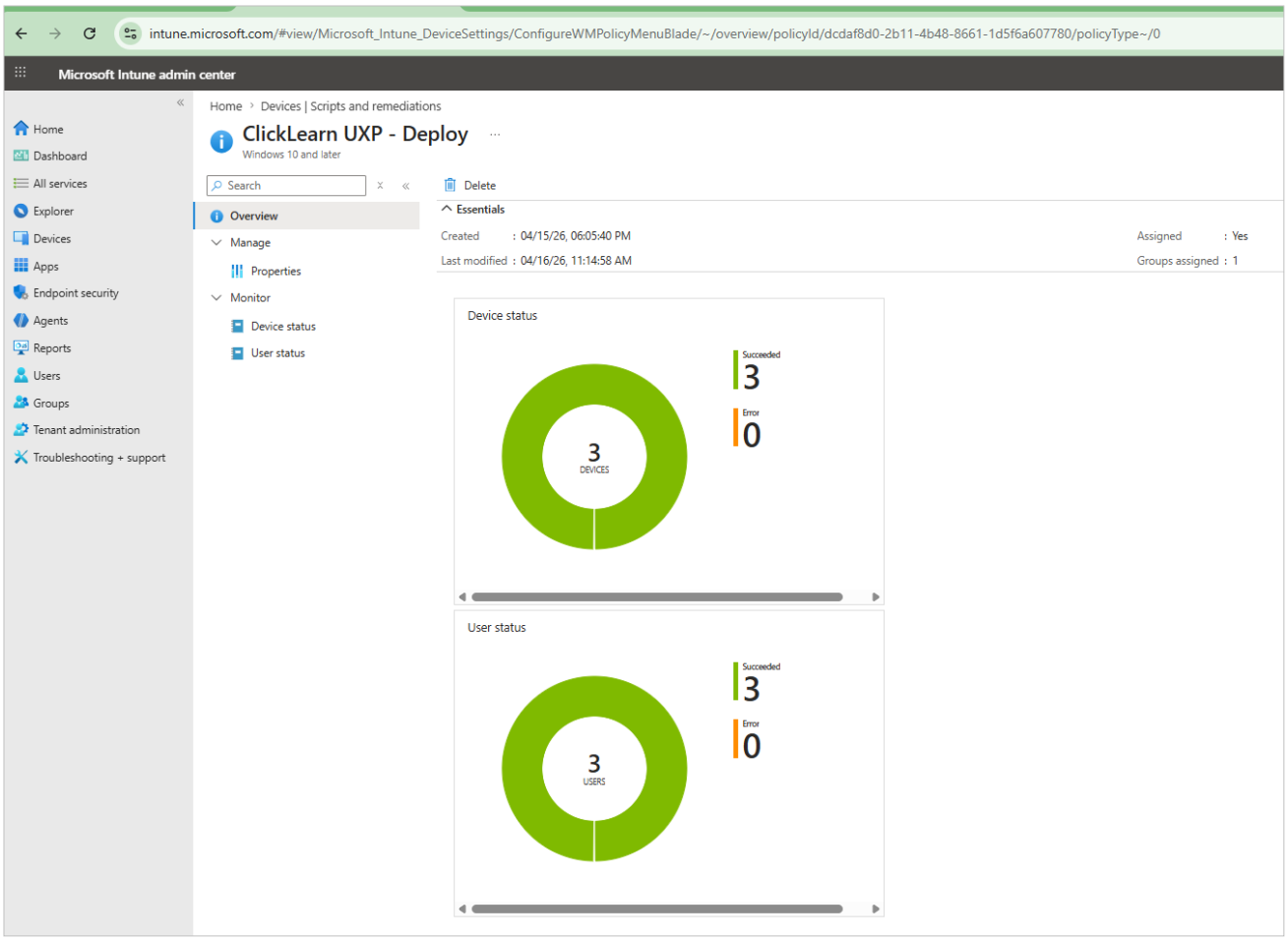


17.23.12. Step 10: Check Deployment Status

To see how the rollout is going:
Open the script from Platform scripts
Check the Device status or User status tab

Status	What It Means
Succeeded	Script ran and extension is installed
Failed	Something went wrong - check device logs
Pending	Device hasn't checked in with Intune yet

If many devices show Failed, double-check that your Content link is correct and reachable from those devices.

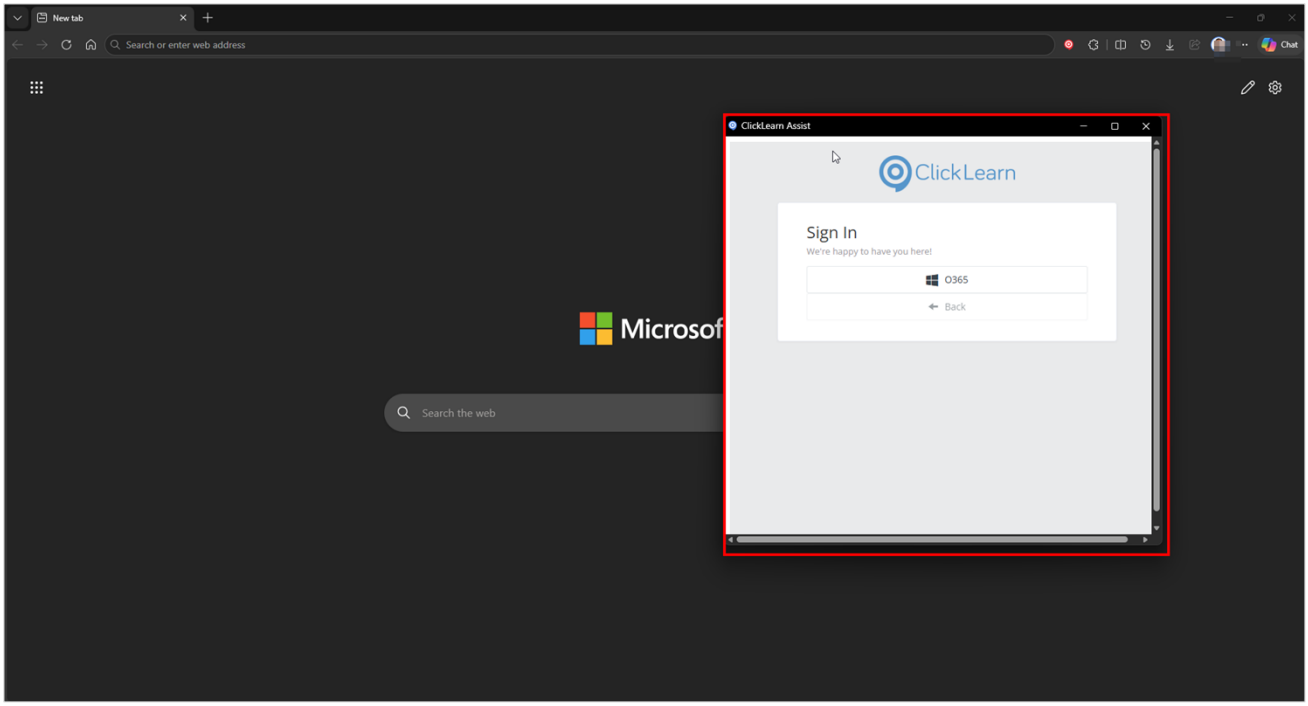


1. **In Intune**: open the script and check Device status. The test device should show Success.
2. **On the device**: open **C:\ProgramData\ClickLearnUXP\Deploy-ClickLearnUXP.log**. The VERIFICATION block at the end should show the forcelist entries, your Content URL and your IsAllow value.
3. **In the browser**: go to chrome://policy or edge://policy, then select Reload policies. **ExtensionInstallForcelist**, ContentUrlSchema and IsAllow should show status OK. Also note ContentUrlSchema and IsAllow wont be displayed in edge policy it will appear only on chrome policy list.

17.23.13. Step 11: Post Deployment

Once the script has been deployed through Intune and executed on user devices, Chrome and Edge will automatically restart so that the new policy settings can be applied.

- For **public content**, users can simply navigate to their business system URL and the ClickLearn UXP icon should be available automatically.
- For **private content**, users will first see the ClickLearn login page based on the configured Content URL. Users should sign in to ClickLearn before accessing their business system. After signing in, navigating to the business system URL will display the ClickLearn UXP and enable access to the configured content.



17.23.14. Updating the content URL or IsAllow

Edit **$ContentUrlSchema** or **$IsAllow** in your copy of the script. Then, in Intune, open the same platform script, go to Properties > Script settings > Edit and upload the updated file. Intune only runs a script again on a device when the script content changes, so uploading the edited file makes it run once more.

If the Content URL changes, the extension signs out users who are already signed in, so they pick up the new URL.

17.23.15. Uninstall UXP

Download the PowerShell script here:
Uninstall Script
Follow the same deployment process as above to rollback.

18. Portal Home Overview

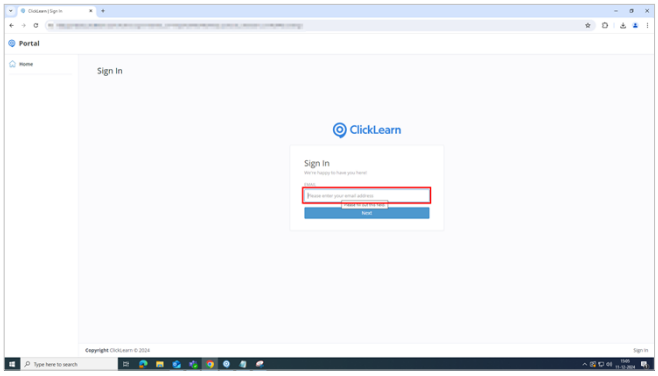
Sign in and get oriented on the Admin Portal home screen, the central hub for managing users, published content, and organisation settings, with quick access to Search, your profile, password reset, the ClickLearn download, and the Community, Universe, and Product Documentation tabs.

18.1.Introduction

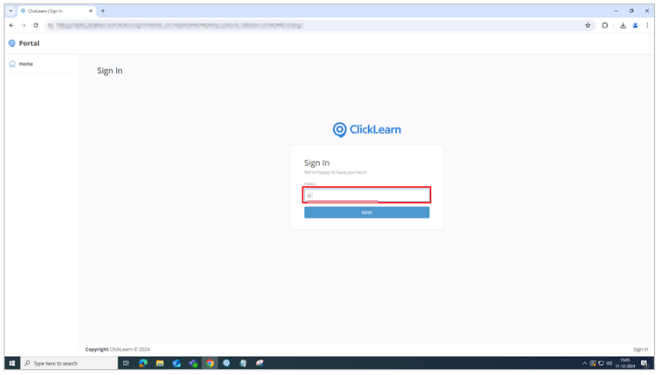
To access a **ClickLearn Portal**, you would have received a license email where you have to simply click, and you will be redirected to the login screen.

18.1.1. Sign in with Email and Password.

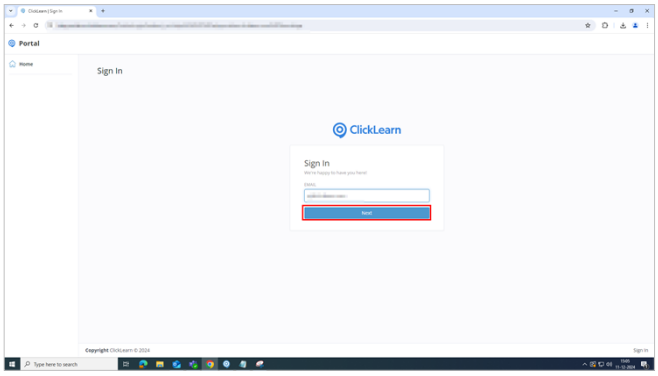
Click on the input field **Please enter your email address.**



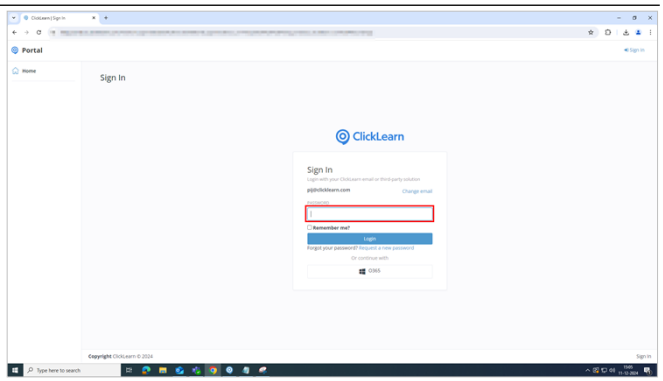
Enter **Please enter your email address**.



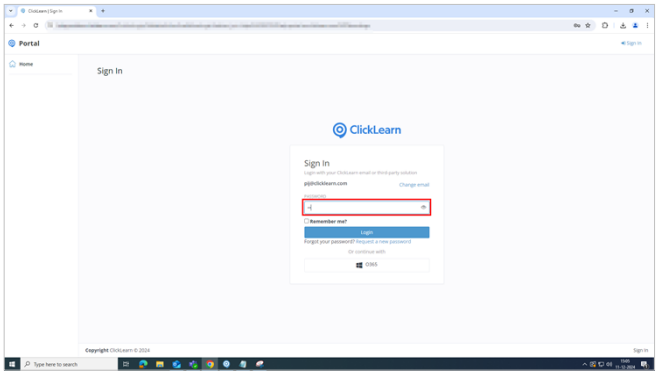
Click on the button **Next.**



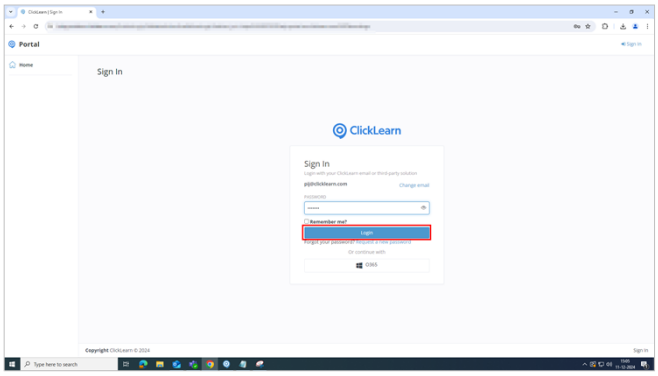
Click on the **password** field.



Enter the **password**.

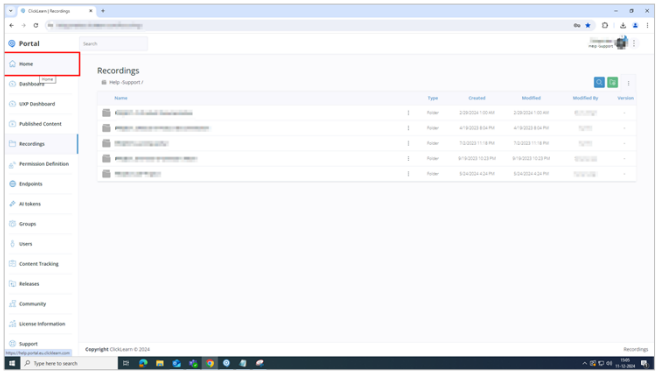


Click on the button **Login.**



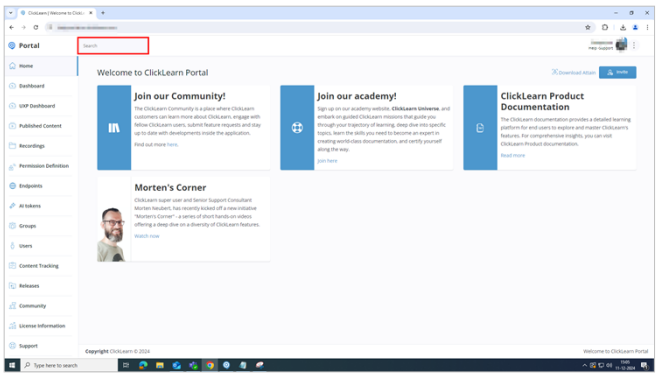
18.1.1.1. Home

Click on the button **Home.**

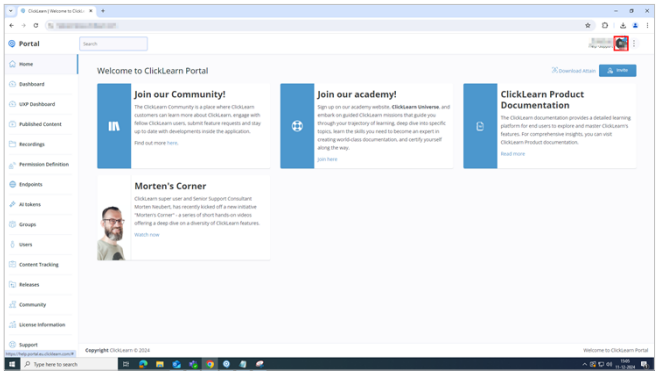


18.1.1.2. Search

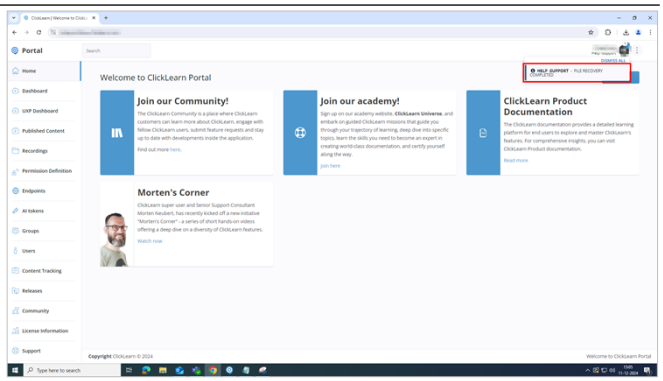
Click on the input field **Search.**



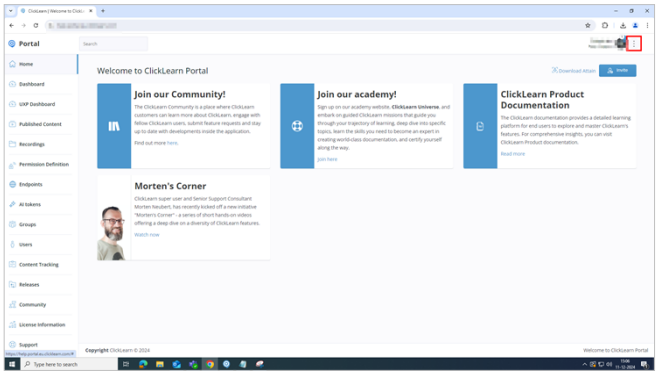
Click on the **profile icon** at the top right corner.



Once you click on the icon, you can see **all notifications** of the portal.

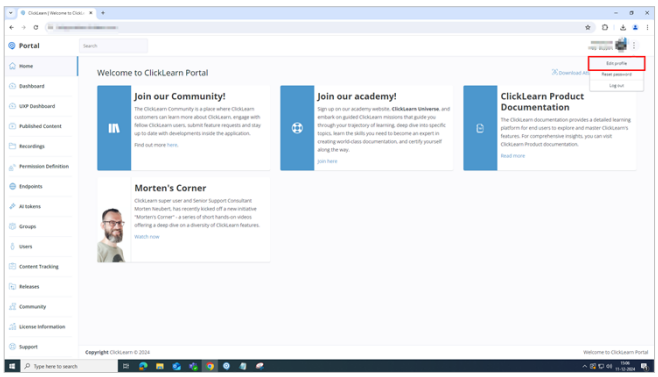


Click on the **three-dot menu** to perform different settings.



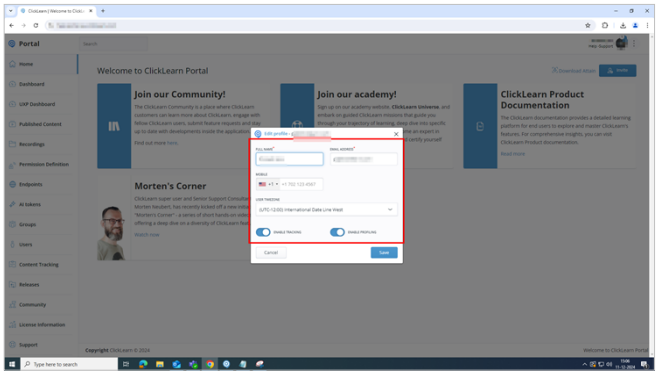
18.1.1.3. Edit Profile

Click on the button **Edit profile.**

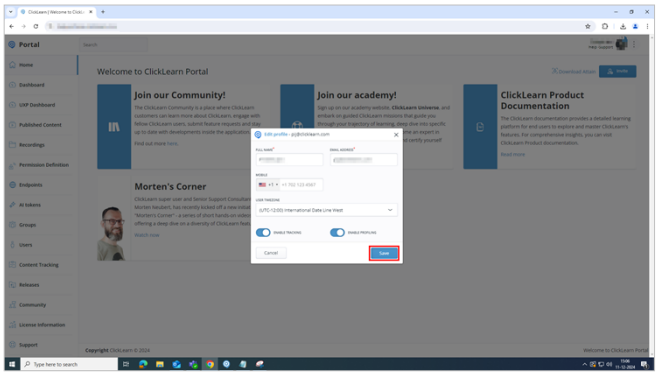


Once you hit the Edit profile button, a new pop-up will appear, letting you edit your name, email address, mobile number, and user timezone.

You can also **enable/disable** tracking and profiling.

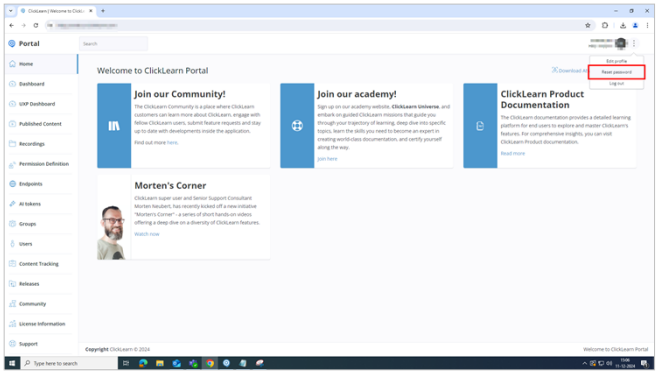


Click on the **Save** button to save data**.**



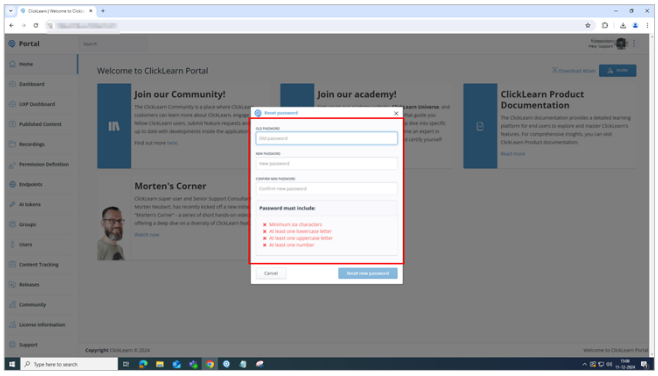
18.1.1.4. Reset Password

Click on the link **Reset password.**

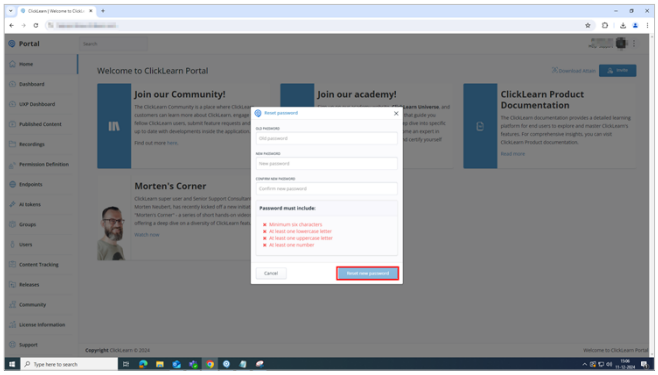


Once you click on reset password, a new pop-up will appear, allowing you to reset your password and set a new one.

Make sure you ensure about **password requirements**.

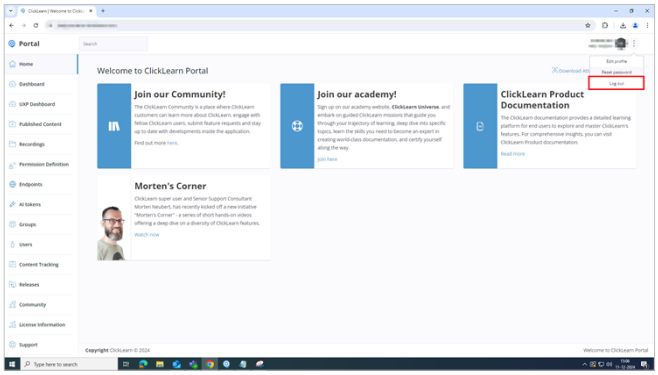


Click on **Reset new password** to update or change**.**



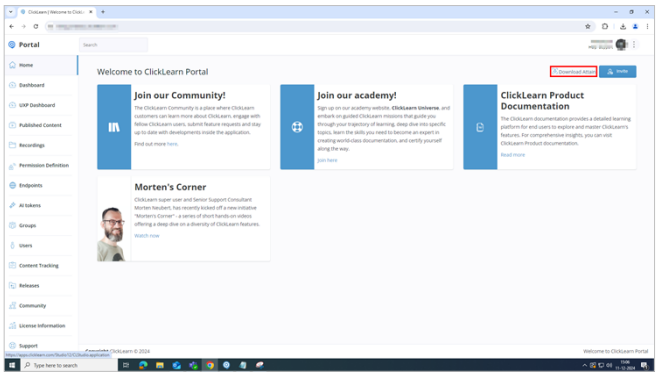
18.1.1.5. Log out

Click on the **log out.**



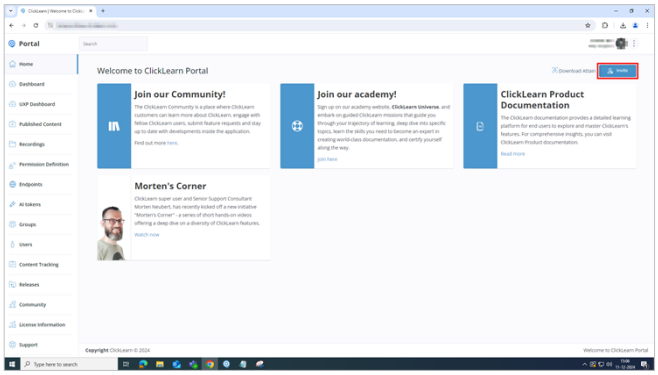
18.1.1.6. Download Attain

Click on the button **Download Attain** to download latest version.

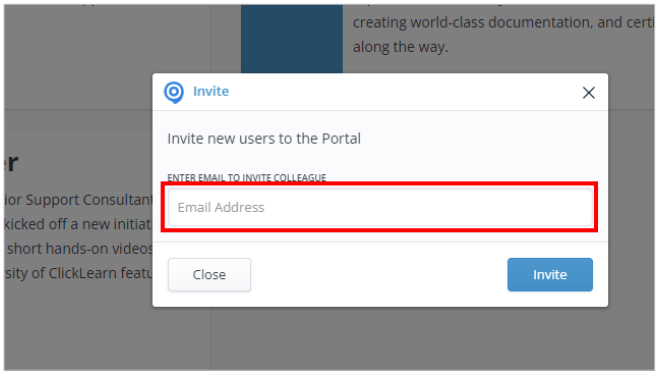


18.1.1.7. Invite Users

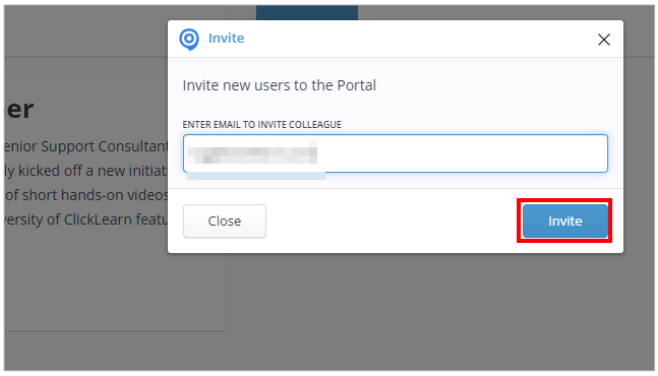
Click on the button **Invite** to Invite new users to the Portal.



Click on the input field **Email Address,** and enter the email address of the user you want to invite.

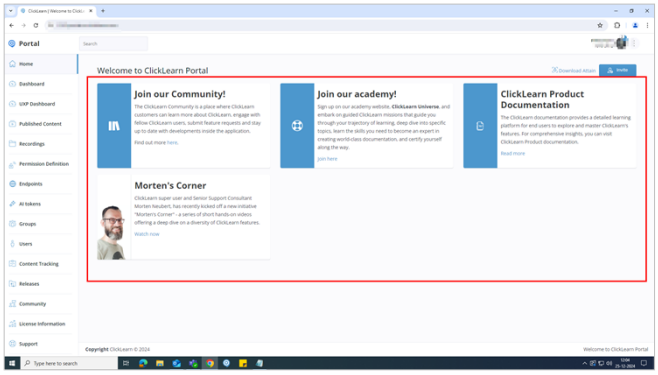


Click on **Invite.**



18.1.1.8. ClickLearn Portal

Once you click on Home, the screen will display various tabs.



- **Join our Community:** The ClickLearn community is a space to find answers, updates, and connect with fellow ClickLearn users.
- **Join our academy:** Click on the link ClickLearn Universe to learn more about specific topics and become an expert in creating world-class documentation.
- **ClickLearn Product Documentation:** ClickLearn product documentation is comprehensive platform for users to learn and master features.
- **Morten's Corner**: Morton is a super user and senior support consultant who initiated Morton's Corner. At Morton's Corner, he shares a series of short, hands-on videos that provide in-depth features of ClickLearn.

19. Admin Portal Dashboard

Monitor how users across your organisation engage with published content, so you can identify which content is working and which users are not being reached.

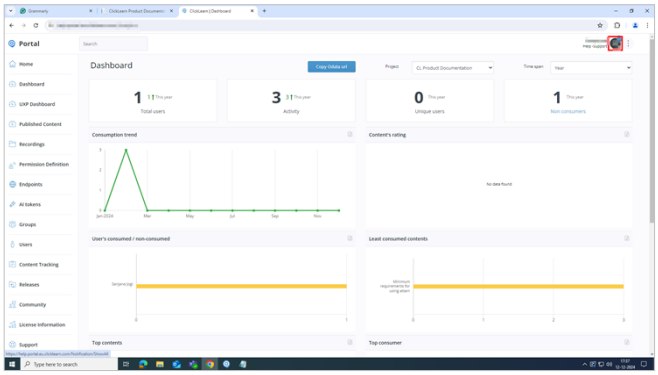
19.1.Introduction

The dashboard helps you gather customer engagement data in one place, giving an instant overview of user interactions with your published content. The dashboard metrics give you a better understanding of how long users engage with your content, either actively or passively. These visual elements include charts, graphs, and single-value widgets to help you better understand the performance of content.

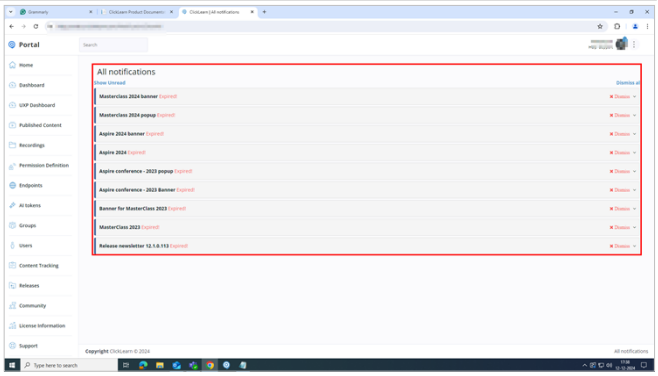
19.1.1. Other Elements

19.1.1.1. All Notifications

Click on the **profile icon** to see all notifications.



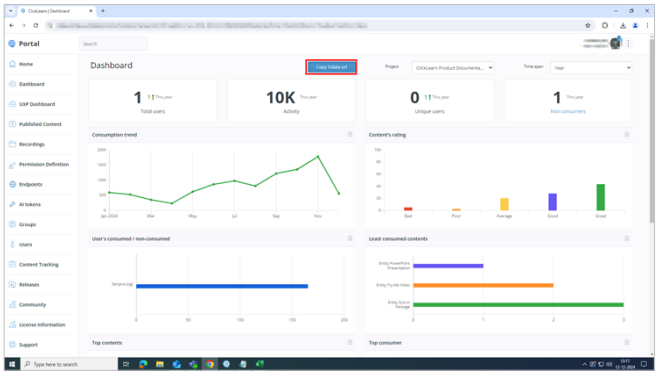
Once you click on profile icon, a new pop-up will appear where you can see all latest notifications.



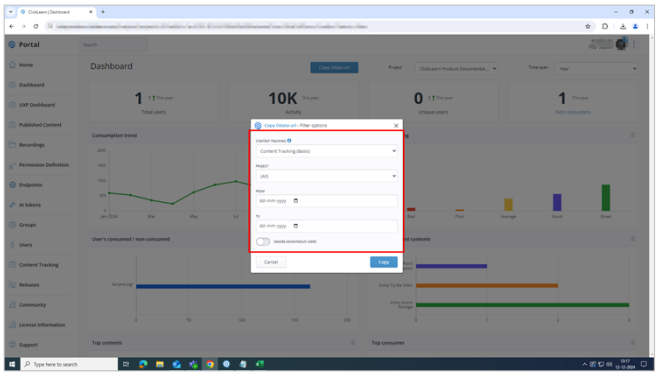
19.1.1.2. Copy Odata URL

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

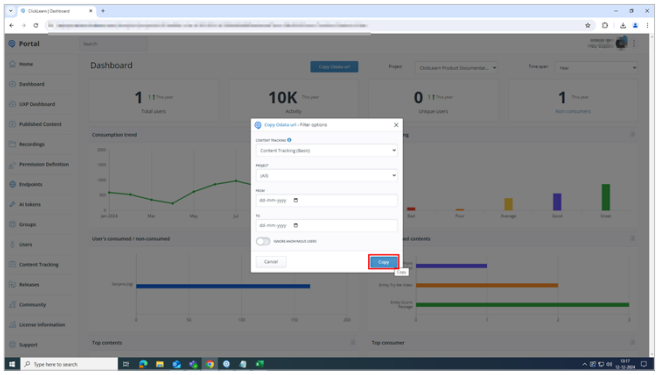
Click on the button **Copy Odata url.**



Once you hit the button Copy Odata URL, a new pop-up will appear. It will let you choose content tracking (basic), published metadata, project, and timespan and also allow you to ignore anonymous users.

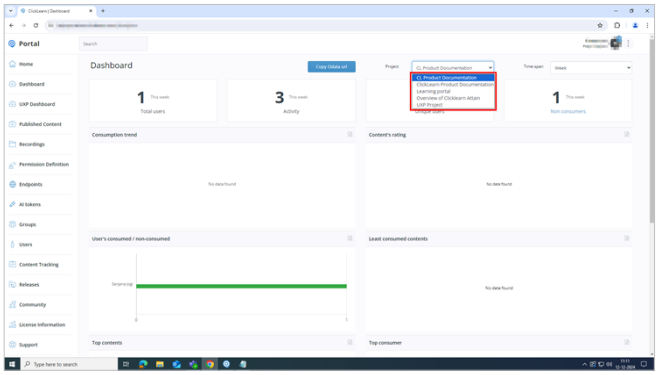


Click on the button **Copy.**



19.1.1.3. Project

Click the **dropdown** and select the project you wish to see on the dashboard.



19.1.1.4. Time Span

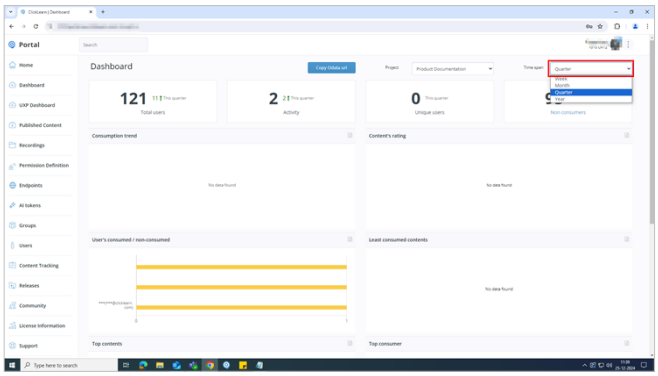
Click on the dropdown and select the **timespan** to specify the time period that you wish to search.

This function offers you with four different options.

- **Week**
- **Month**
- **Quarter**

Year

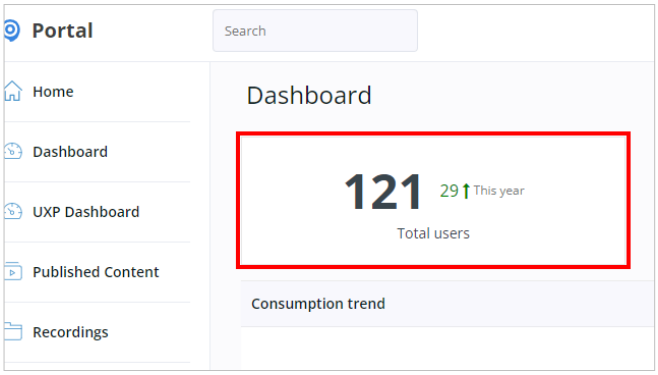
-



19.1.1.5. Total Users

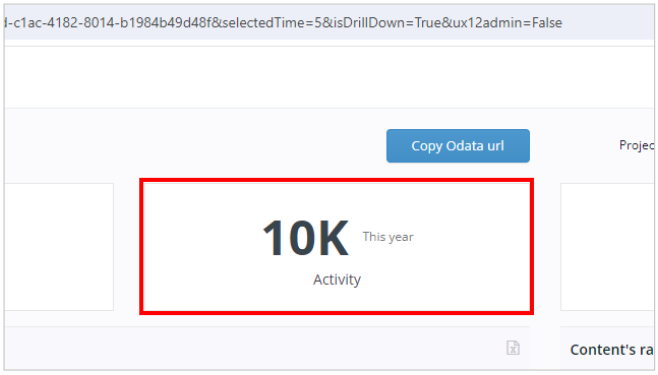
Total users is the total number of users who used the portal or have seen content.

Here, 121 user (total user) has seen content for the project CL Product documentation during this year.



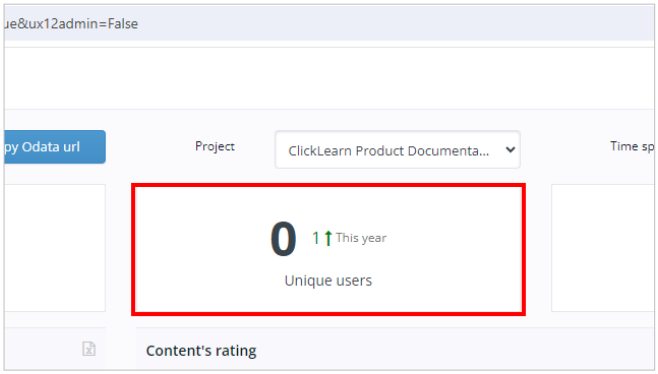
19.1.1.6. Activity

Activity means the amount of time users take to complete an activity.



19.1.1.7. Unique Visitors

Unique visitors are the number of unduplicated individual users or **new users** who used the portal or saw the content over a year.

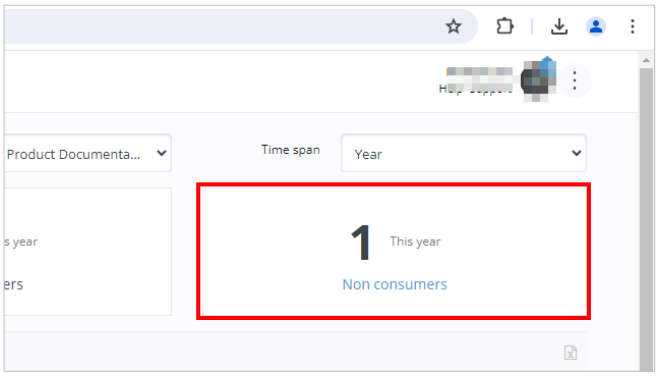


19.1.1.8. Non Consumers

Non consumers are those who haven't seen your content.

Let's say you have 10 end users, 5 of whom have seen content and 5 of whom haven't. Then, those 5 left out will be considered non-consumers.

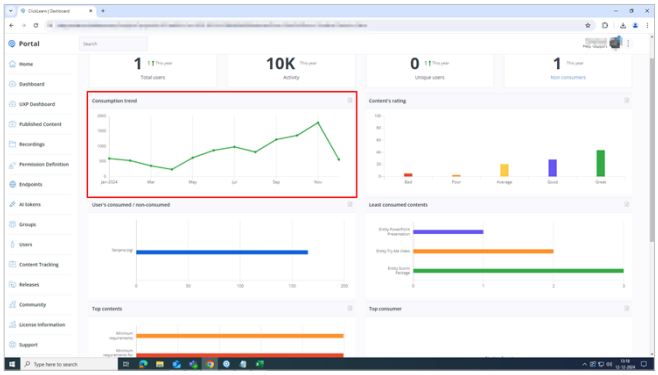
Click on **Non-Consumers** to see a list .



19.1.1.9. Consumption Trend

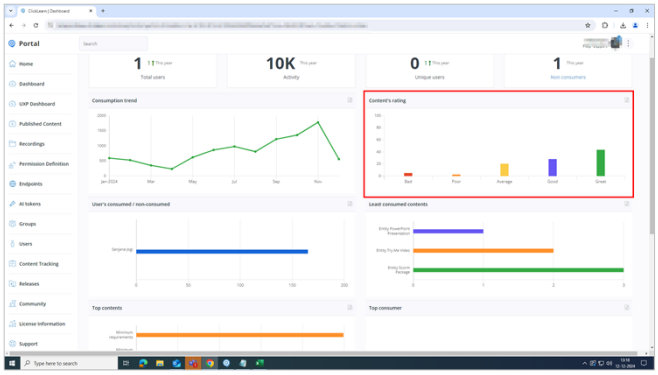
The consumption trend graph shows content that's trending for a particular month. Users can see which content is trending by clicking on each month.

Once you click on a month, a new pop-up will appear where you can choose a project and view the content dashboard for each project.



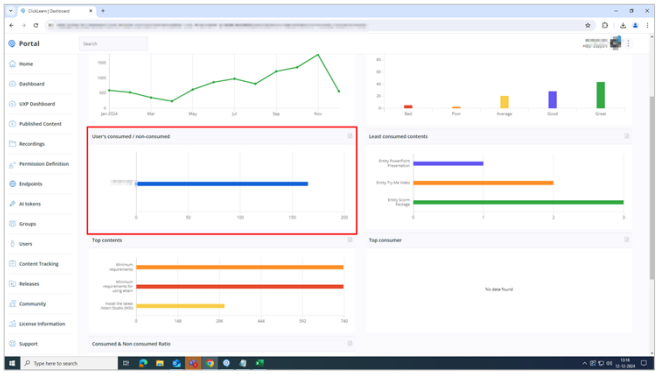
19.1.1.10. Content's Rating

In the content rating, you can see the content performance and comments users have posted. You can see content rated bad, poor, average, good, and great by clicking on each.



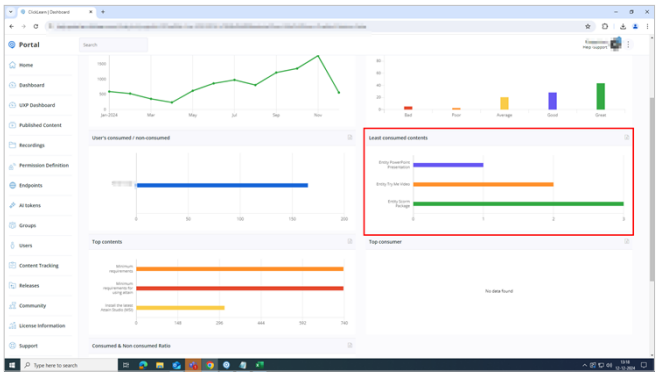
19.1.1.11. User's Consumed / Non-Consumed

Here, consumed content and non-consumed content can be seen. Once you click on a **name**, you will be redirected to the list of non-consumed content.



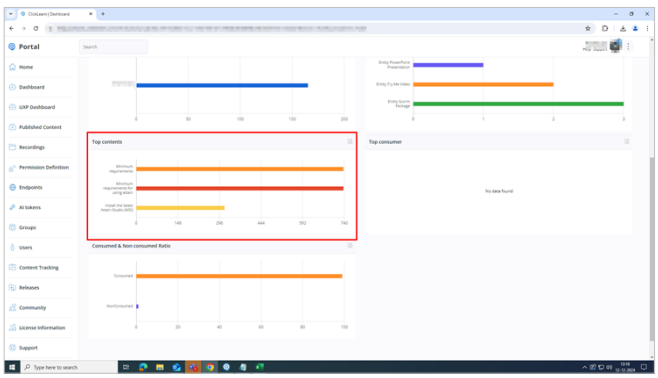
19.1.1.12. Least Consumed Contents

This is where you can see the list of least consumed contents among all contents. The graph shows three different contents with the least consumption.



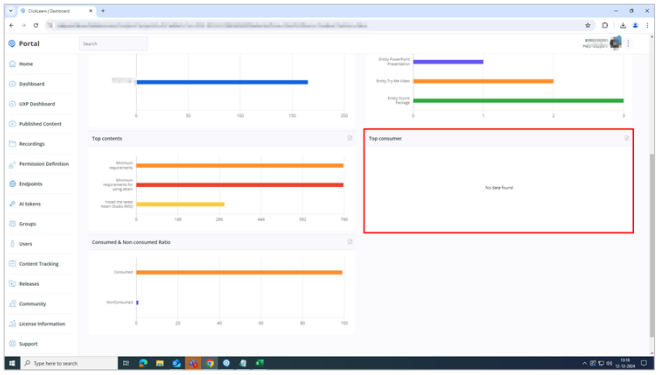
19.1.1.13. Top Contents

In top contents, you can see the list of top contents. This means content performing well will be displayed here with the consumption.



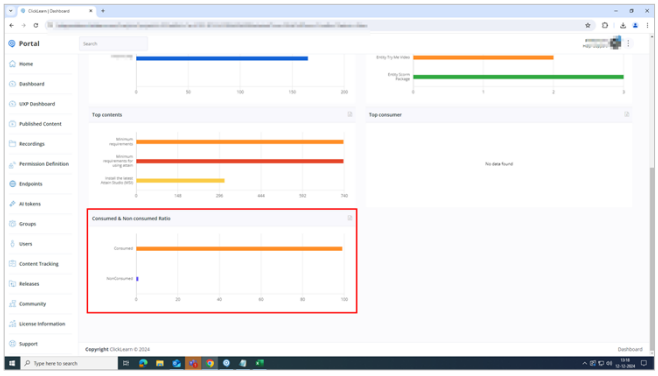
19.1.1.14. Top Consumer

These are the primary consumers of the content. The list will show who consumed content the most.



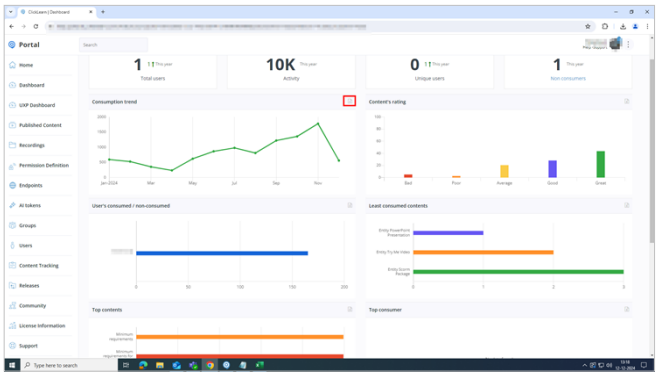
19.1.1.15. Consumed & Non Consumed Ratio

This will show the percentage of consumed and non-consumed content ration.



19.1.1.16. Export Data

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



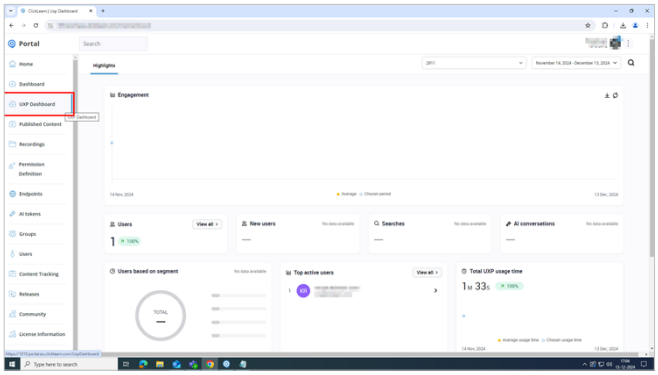
20. UXP Dashboard

Track engagement with the UXP panel across your user base, so you understand which content is being surfaced, which searches are run, and how the AI chat is being used.

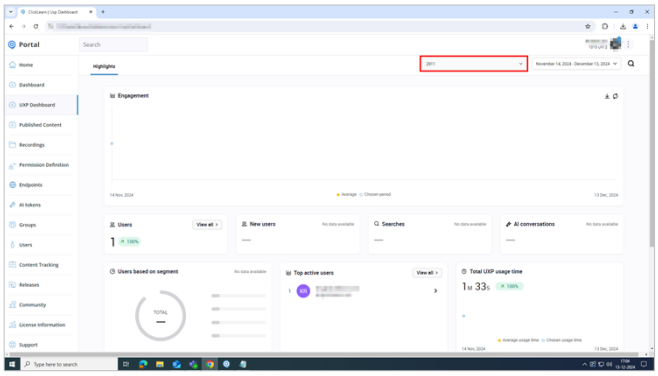
20.1.Introduction

Assess the impact of the User Experience Panel using the new User Experience Panel Dashboard. Discover how users are interacting with your content, notifications, and AI chat. Identify your champions within the User Experience Panel and implement suggestions provided by end users.

Click on the button **UXP Dashboard.**

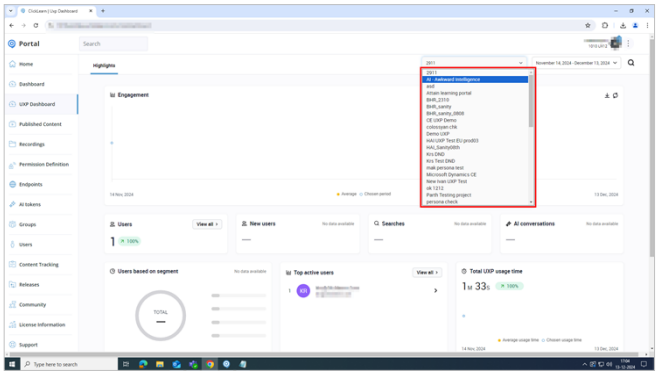


Click on the **combo box.**



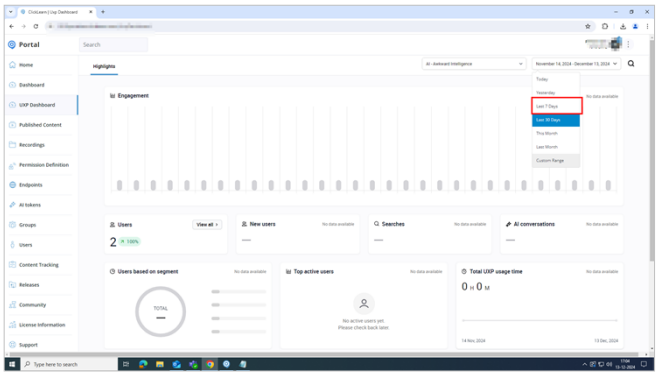
Select a project from the list you wish to see in the UXP dashboard.

Here, we are selecting **AI - Awkward Intelligence** from the list.

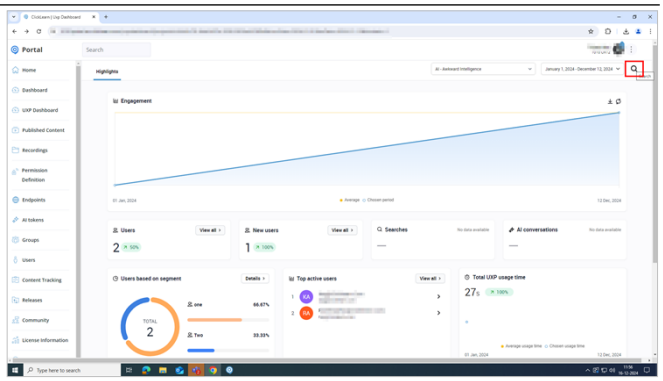


Choose a timeframe to view the data on the UXP dashboard.

Here, we are selecting **Custom Range**, which allows us to define our own date range by selecting the start and end dates.

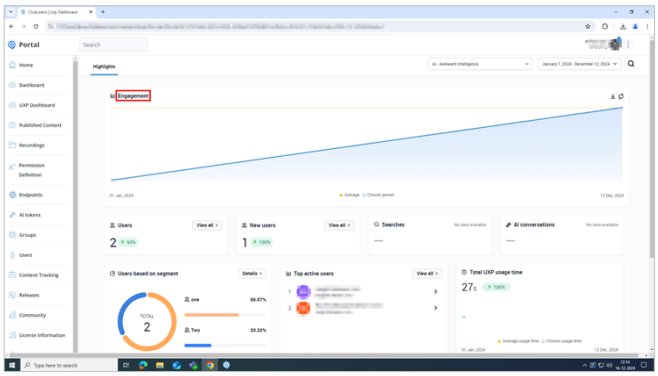


Click the **Search** button, and type what you're looking for in the search box.

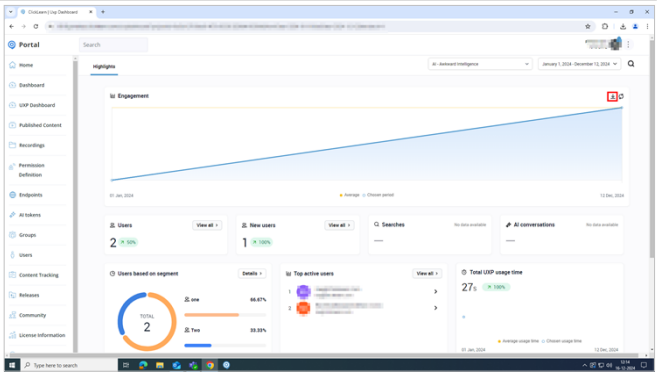


20.2.Engagement

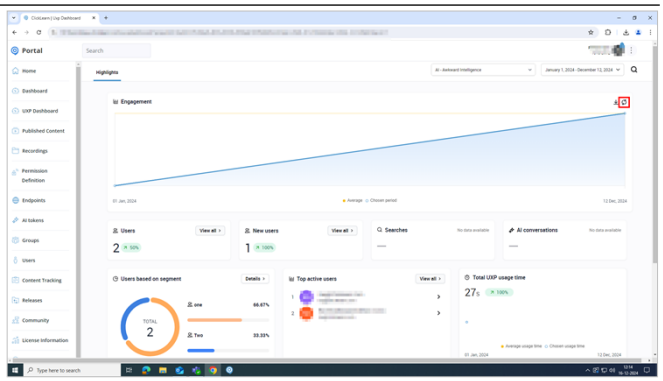
Engagement: This shows the project's engagement ratio.



Download: To download the engagement statistics, click the download button.

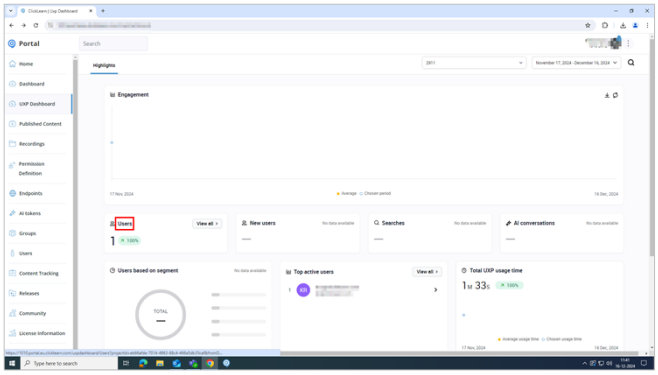


Refresh: This refreshes the engagement statistics.

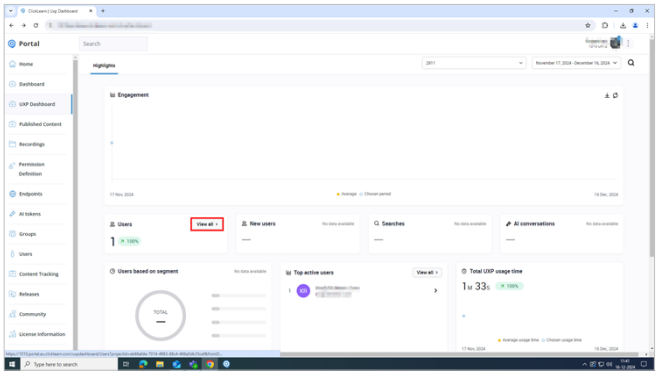


20.2.1. Users

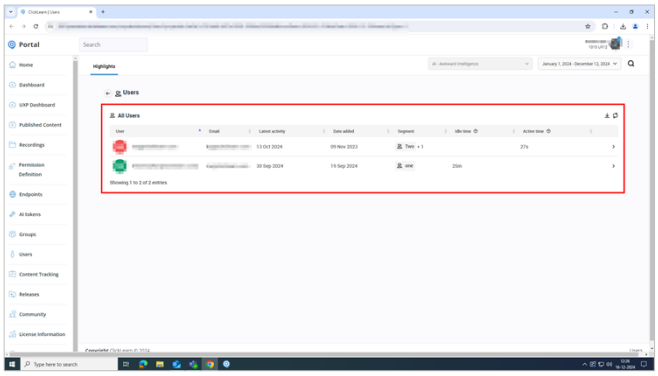
Users: This displays the list of users linked to that particular project.



Click on the link **View all** to see all users.

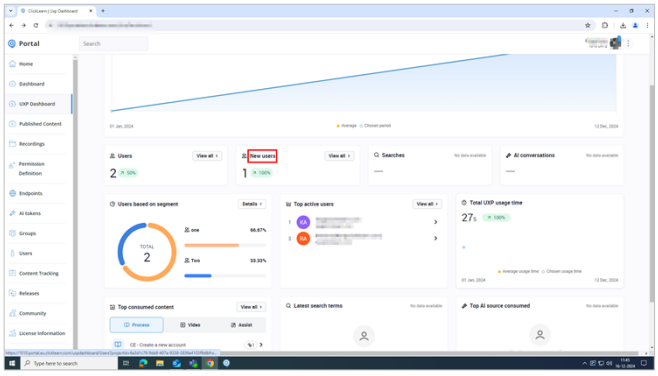


This displays the user details like the user name, email, latest activity, date added, active time, etc.

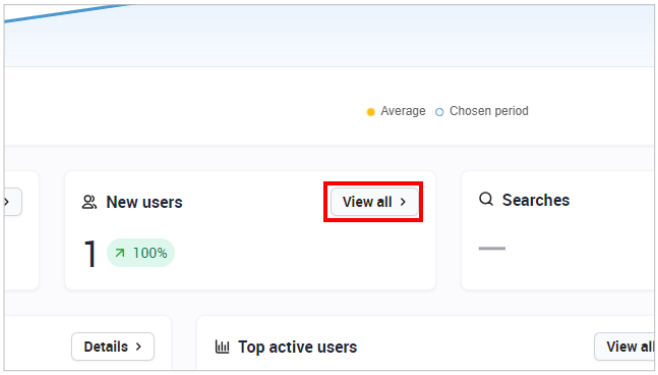


20.2.2. New Users

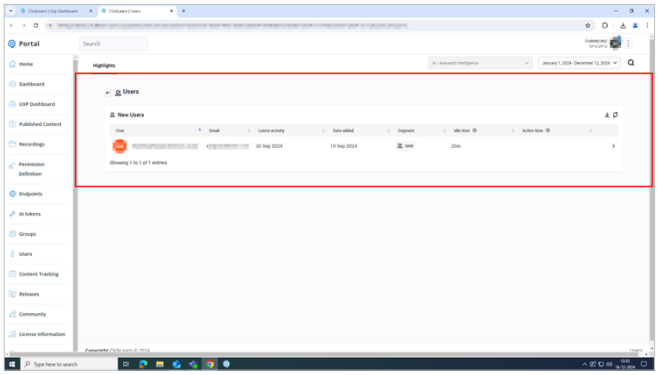
New users: This displays new users for that particular project.



Click on the button **View all** to see all users.

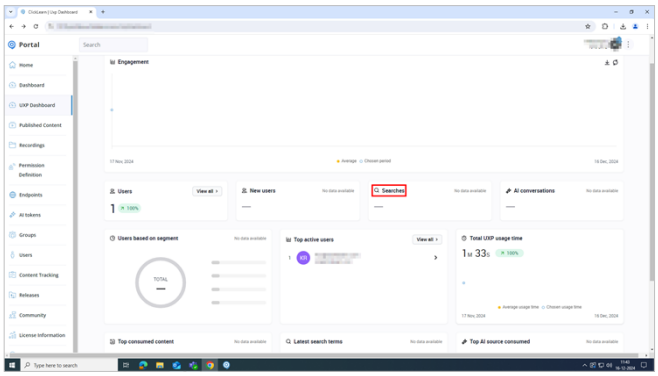


Once you click the View All button, a new pop-up will open displaying all the details of the users, such as their user name, email, segment, idle time, and active time.



20.2.3. Searches

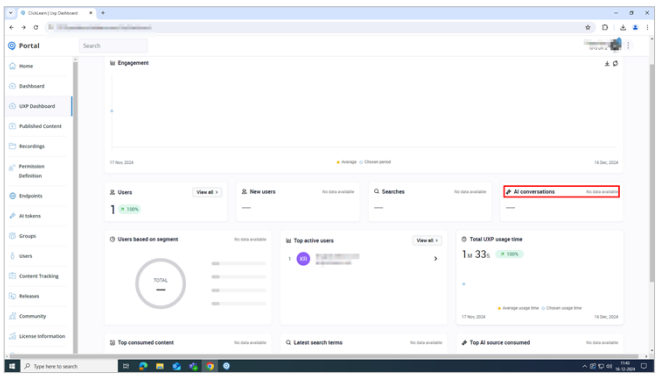
Searches: You can search for a particular user using the search feature.



20.2.4. AI Conversations

AI conversations: This displays the AI conversations with that particular project.

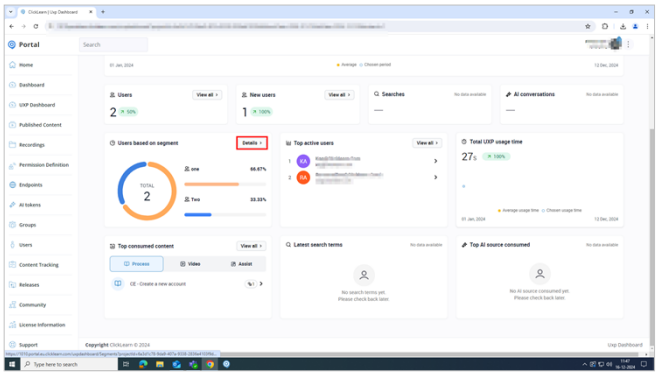
Currently, there are no AI conversations for the selected project and timeframe.



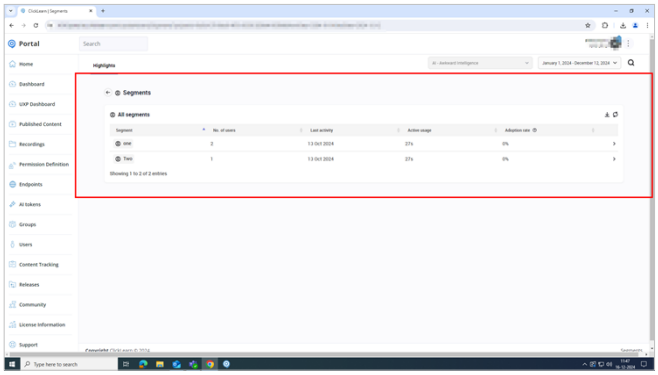
20.2.5. Users Based on Segment

Users based on segment: This displays the virtual representation of the users based on segments.

Click on **Details**.

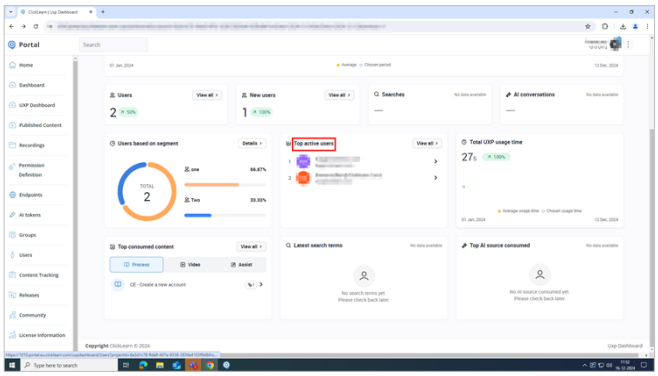


The interface gathers all the segments that are associated with your specific project.

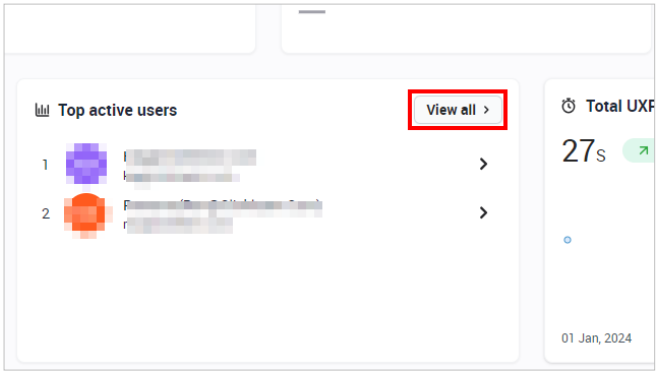


20.2.6. Top Active Users

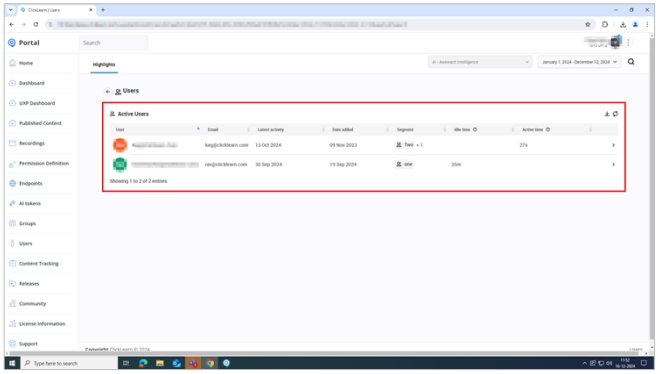
Top active users: This displays the list of top active users for that particular project.



Click on the button: **View all**.

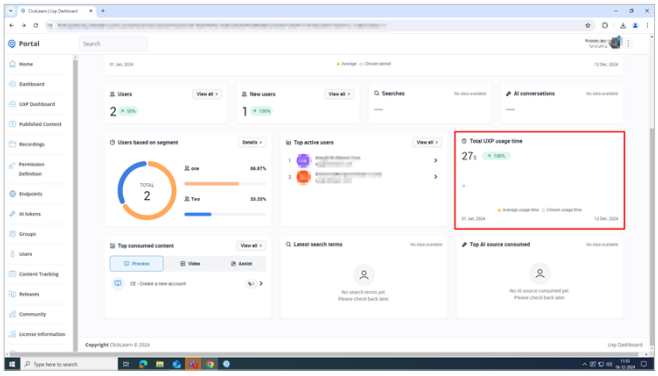


This displays the list of **Active Users**.



20.2.7. Total UXP Usage Time

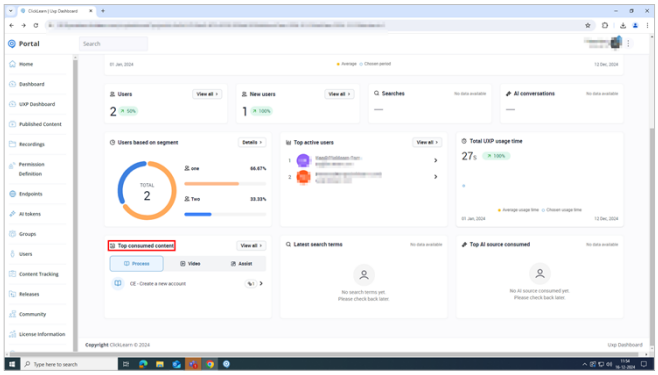
This displays the Total UXP usage time the user spent on the selected project.



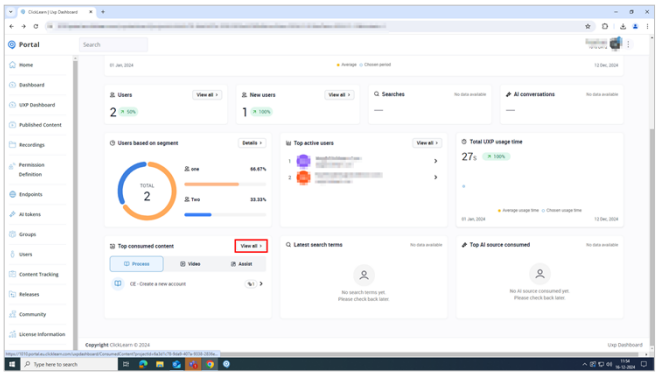
As you can see, for this project, the total UXP usage time is 27 seconds.

20.2.8. Top Consumed Content

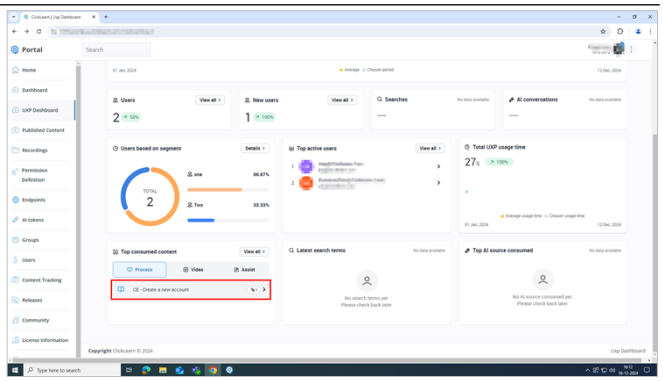
Top consumed content: This displays the top consumed content.



Click on the button **View all** to see all consumed content (**process**, **video**, and **assist)**.



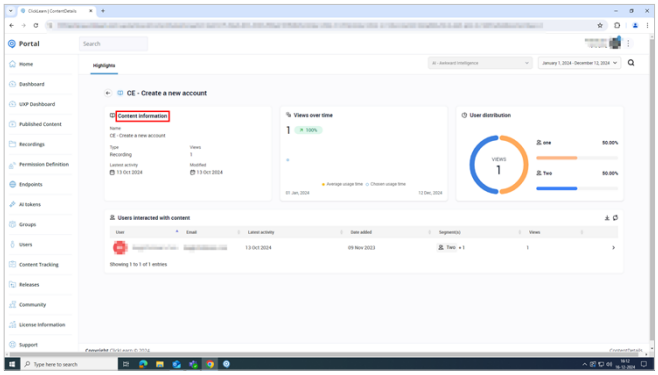
Click on **Create a new account.**



Content information: This displays the recording's name, type, views, latest activity, modified, etc.

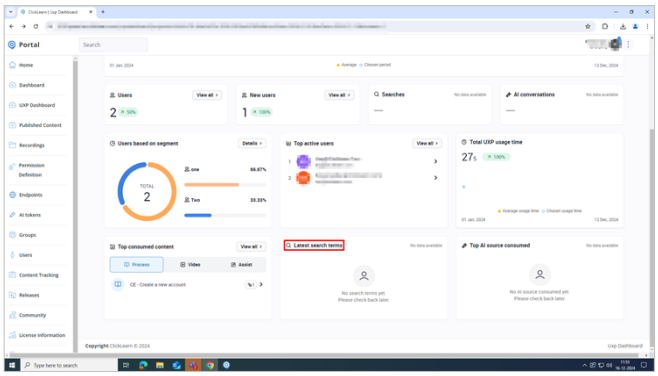
Content information also includes these details:

- **Views over time**: This displays the user views.
- **User distribution**: This displays the user distribution of the content.
- **Users interacted with the content**: This displays the list of users who have interacted with the content.



20.2.9. Latest Search Terms

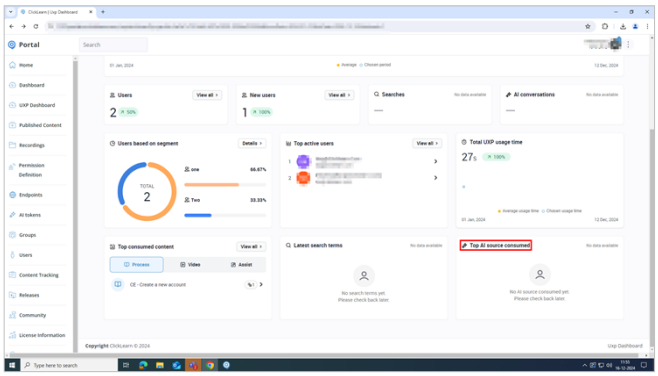
Latest search terms: This displays the most recent search terms used by the end user.



20.2.10. Top AI Source Consumed

Top AI source consumed: This displays the sources of AI source consumption.

Currently, no AI source has been consumed yet.



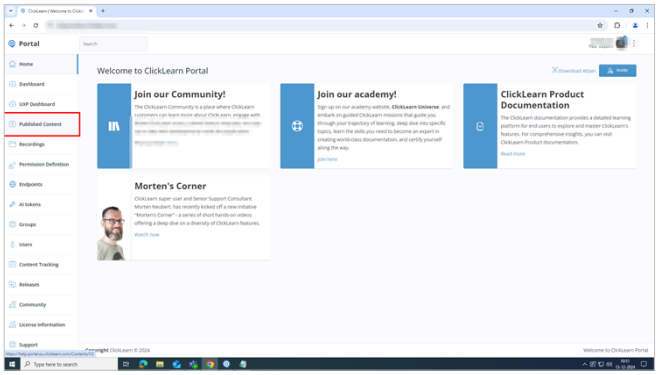
21. Manage Published Content

Oversee all published versions of your organisation's content from one place, so you can update permissions, remove outdated versions, and track who has access.

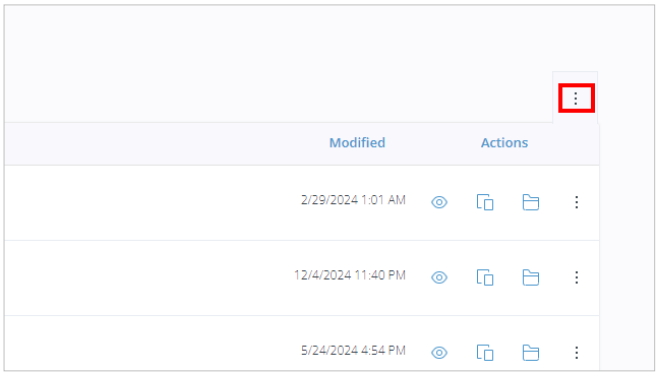
21.1.Introduction

Published content refers to material that has already been shared by users within your organization. You can perform various actions and view the users who modified these items.

Click on the link **Published Content.**



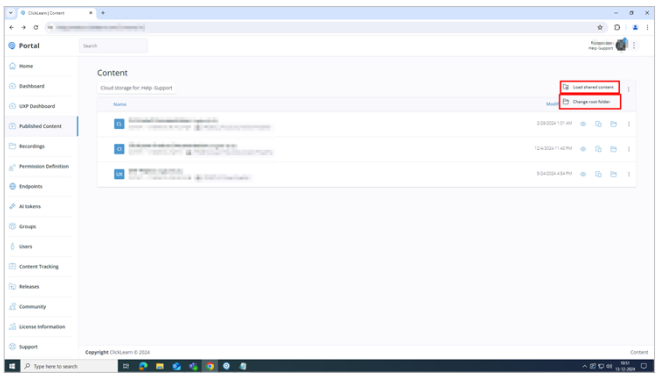
Click on the **three dot button** to open the menu.



21.1.1. Other Elements

Other Elements

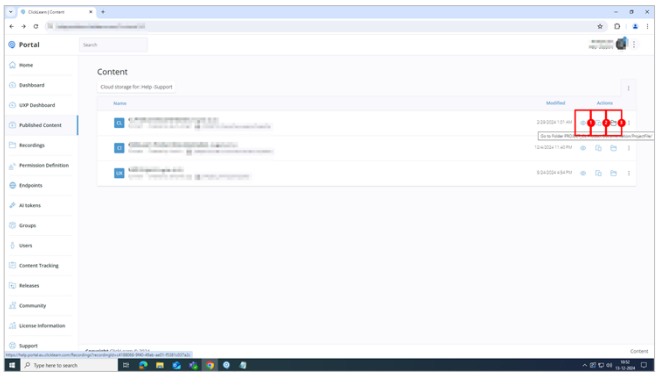
- **Load shared content**: If you share a recording/structure, it will load that particular content.
- **Change root folder**: This option allows you to change the root folder.



21.1.1.1. Actions

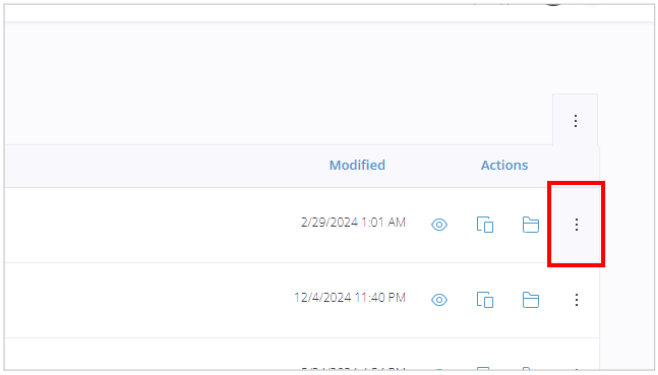
Options associated with the action menu

1. Click on the link **View content** to preview content.
2. Click the **Copy** button to copy the link of the published content for a selected project.
3. Click on the button **Go to Folder** to see all the files of the selected project.



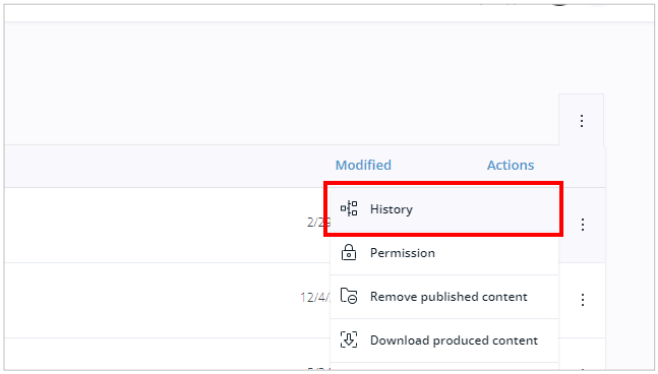
21.1.1.2. Open Menu

Click on the **three-dot button** to open a menu.

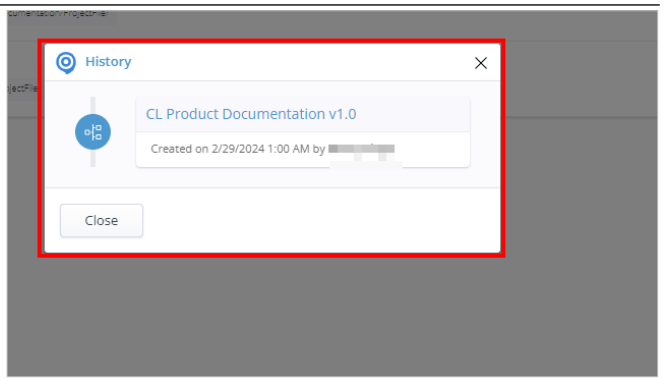


21.1.1.3. History

Click on the button **History.**

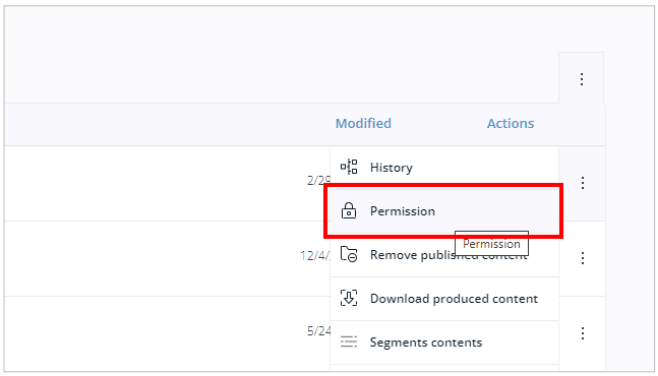


This will display a new pop-up containing details of previous recording versions, including the person who created it with the date and time.



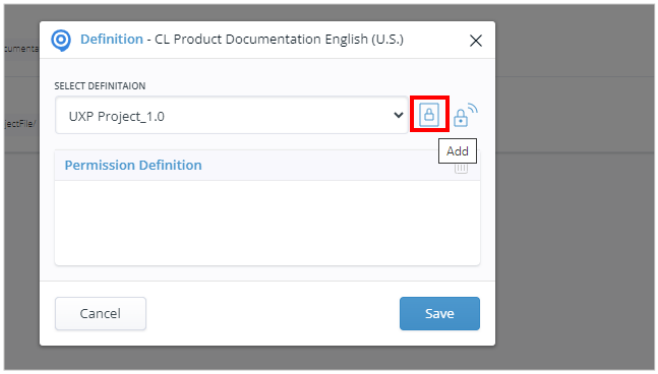
21.1.1.4. Permission

Click on the button **Permission.**

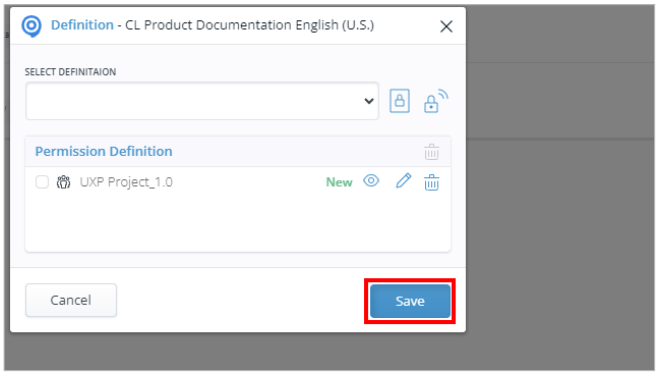


21.1.1.5. Add Permission

Select the definition and Click on the button **Add** to add permission.

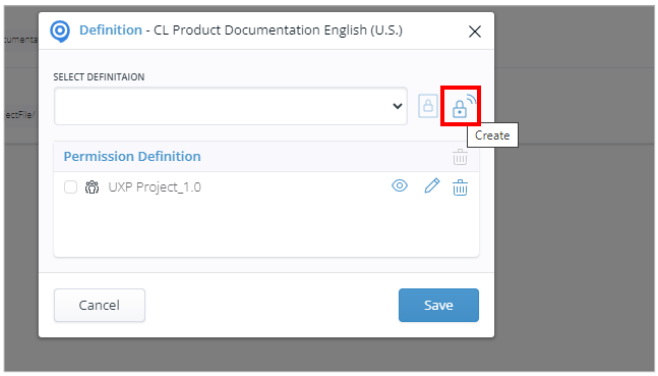


Click on the button **Save** to add permission.

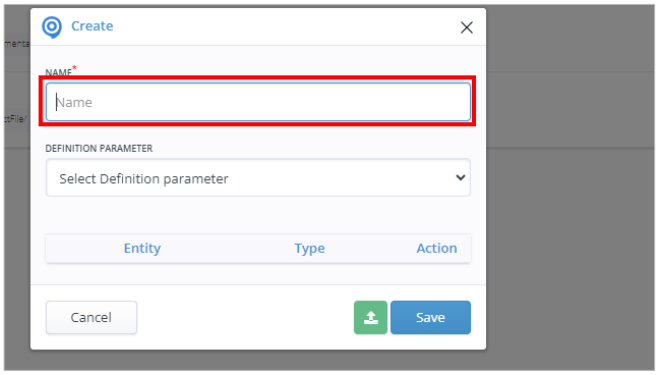


21.1.1.6. Create Permission

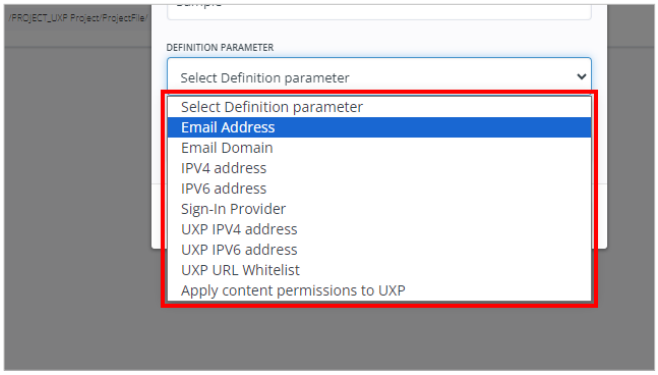
Click on the button **Create** to create permission.



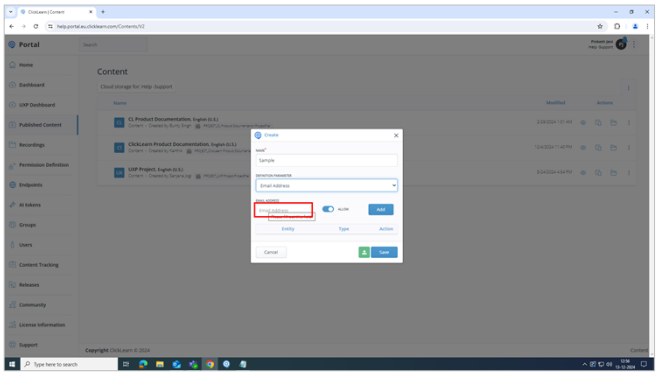
Click on the input field **Name** and enter name.



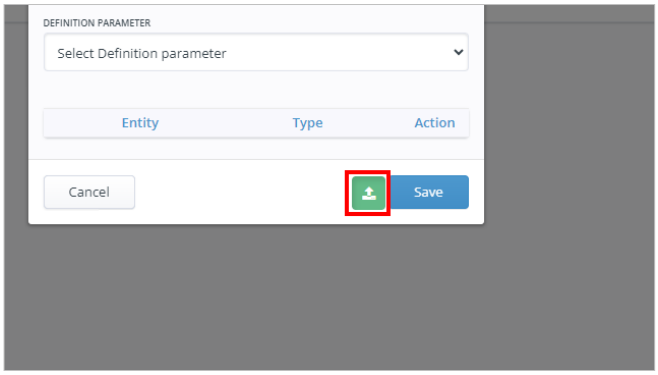
Click on the definition parameter dropdown and select **Email Address** in the list.



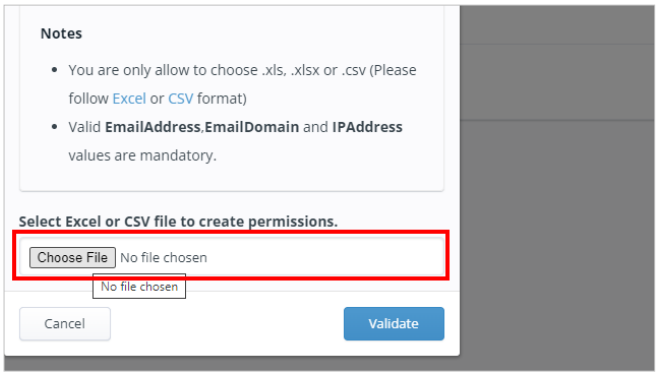
Click on the input field **Email Address** and enter email.



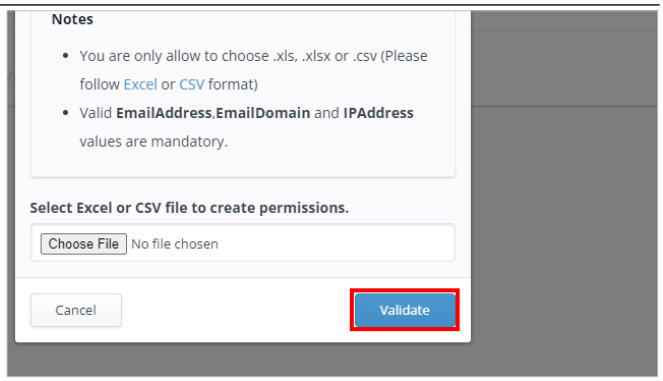
Click on the button **Upload File.**



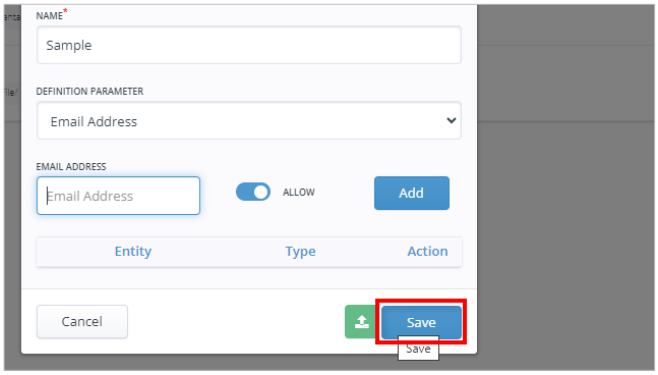
Choose **Excel or CSV** file to create permissions.



Click on **Validate** to validate file.

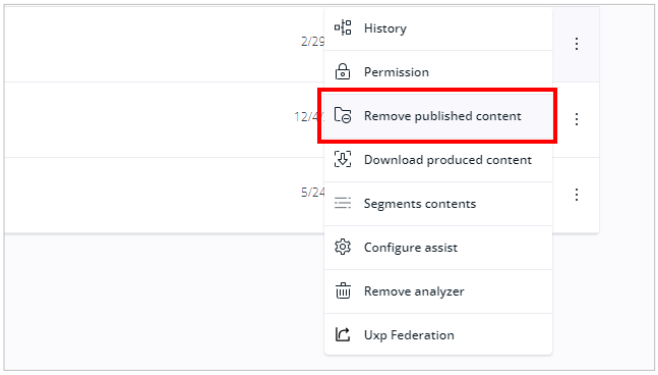


Click on the button **Save.**

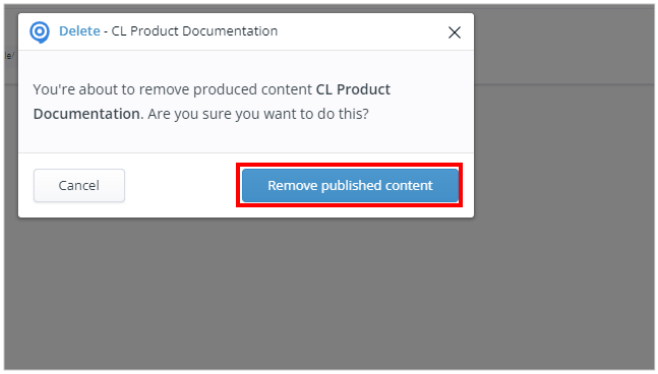


21.1.1.7. Remove Published Content

Click on the button **Remove published content.**

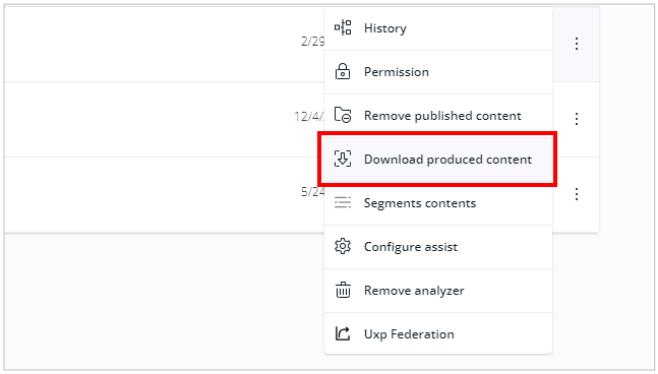


Click on **Remove published content** to delete content.



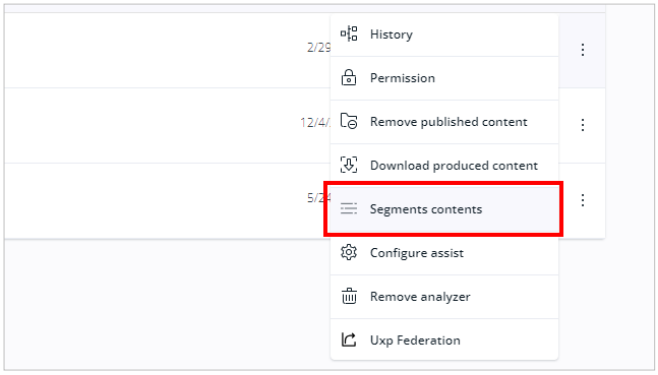
21.1.1.8. Download Produced Content

Click on the link **Download produced content** to download published content.



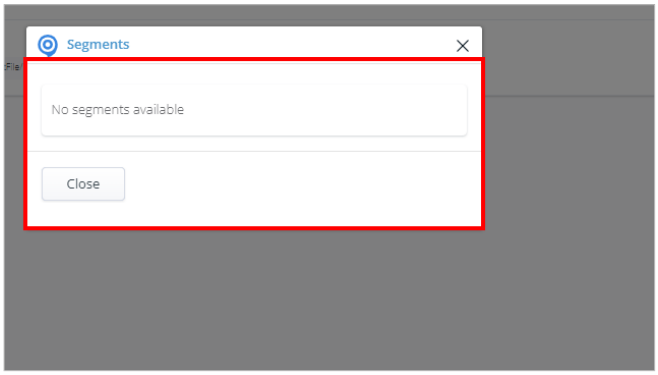
21.1.1.9. Segments Contents

Click on the button **Segments contents** to segment content.



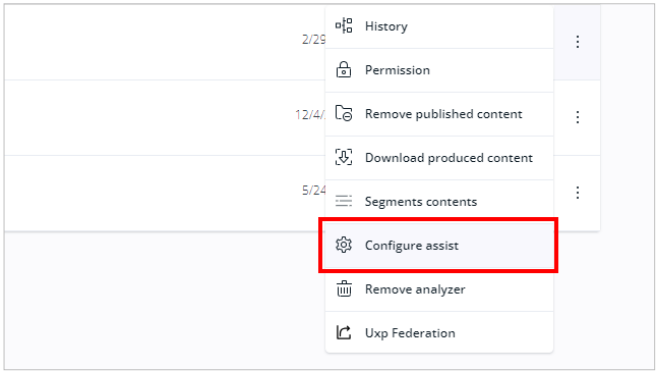
This opens a new pop-up, which shows that currently, there's **no segment available**.

If there are segments, it will show you a list of them.

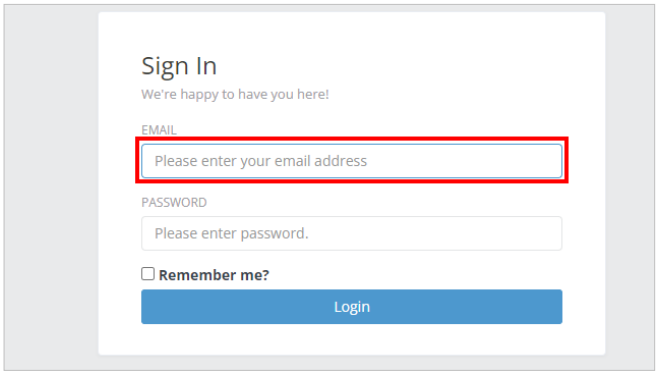


21.1.1.10. Configure Assist

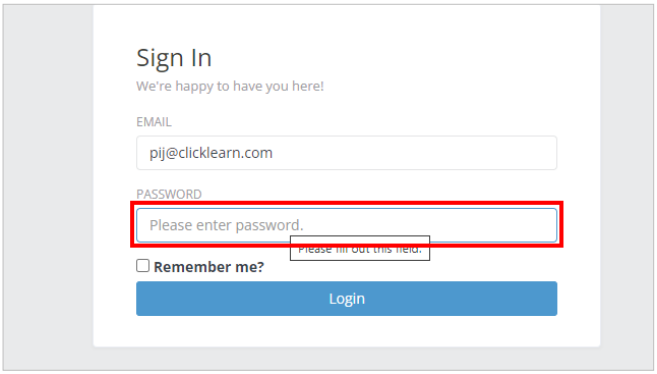
Click on the link **Configure assist.**



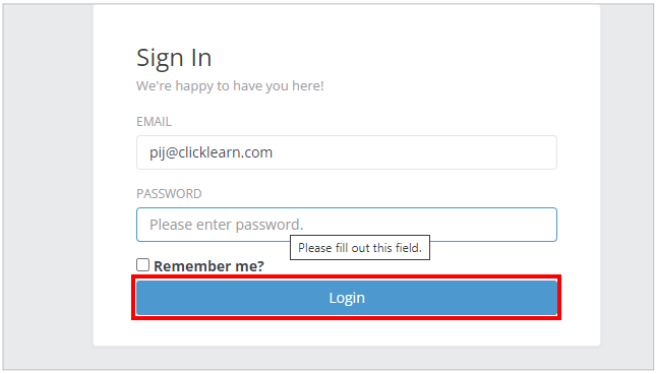
Click on the input field **Please enter your email address** and enter your email.



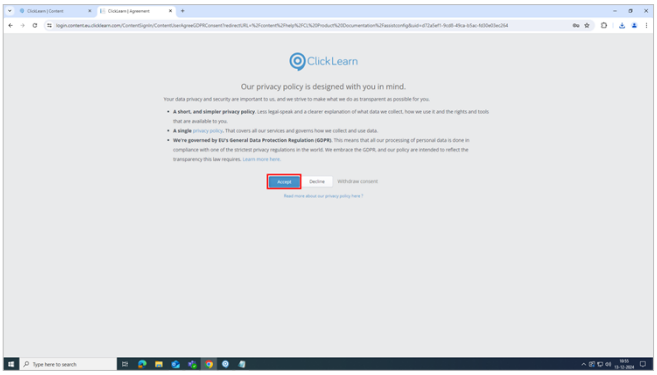
Click on the password field **Please enter password** and enter password.



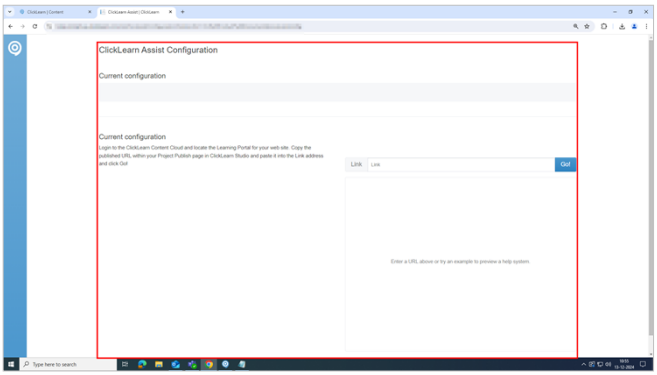
Click on the button **Login**.



Click on the button **Accept** to agree privacy policy.

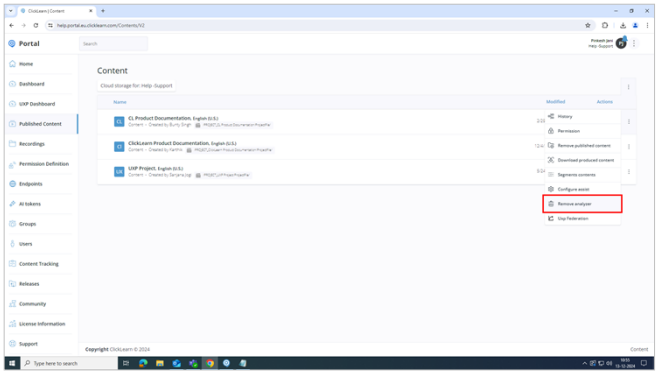


Once you hit the ClickLearn Assist Configuration button, this is how the screen will look. Copy the published URL within your Project Publish page in ClickLearn studio, paste it into the Link Address, and click Go.

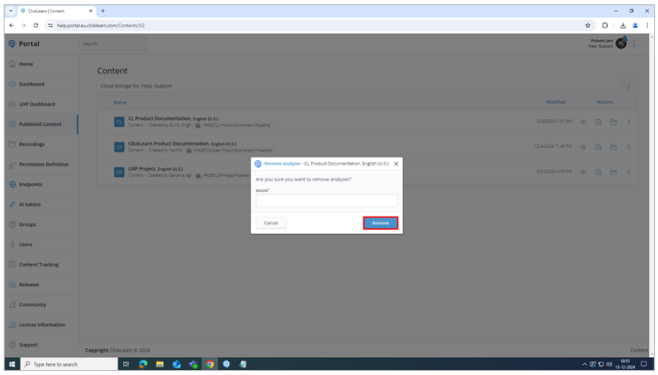


21.1.1.11. Remove Analyzer

Click on the link **Remove analyzer.**



The **Remove Analyzer** lets you force a full regeneration of published content when updates do not appear as expected.



When content is republished, the Analyzer reviews previously generated output to identify similarities. Matching items are excluded, and only the differences are generated, which keeps republishing efficient. If this analysis fails, you can delete the analyzer file so that it is regenerated and the system produces the complete content without any exclusions.

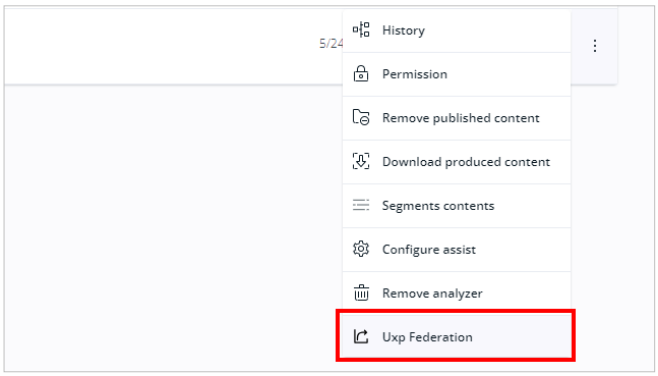
Removing the analyzer and publishing again can resolve the issue and ensure the content updates as expected.

When removing the analyzer, you must enter a Reason for the removal before confirming the action.

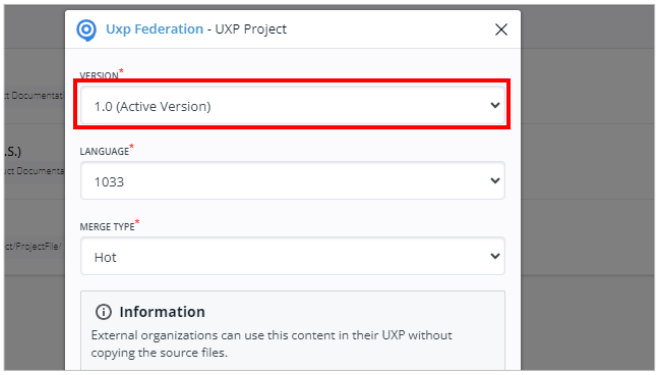
Write a reason in the checkbox and click on **Remove**.

21.1.1.12. Uxp Federation

Click on **Uxp Federation**.

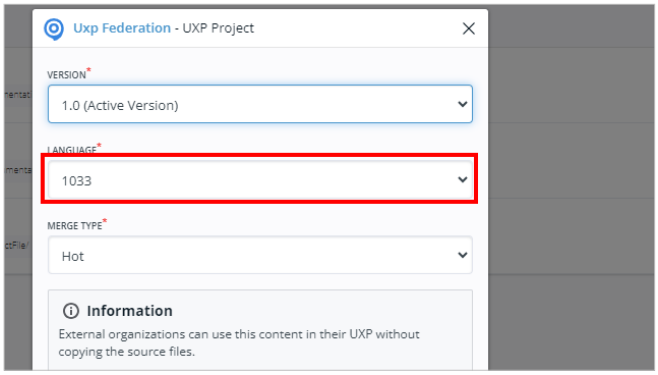


This displays the active version of the project.

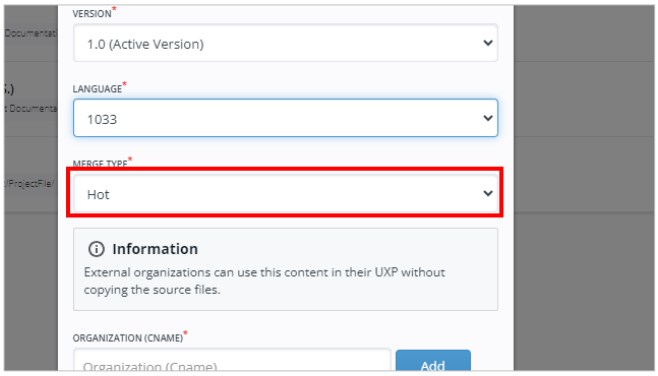


If you have multiple versions, you can choose the version you want to use.

You can select the language of the project.



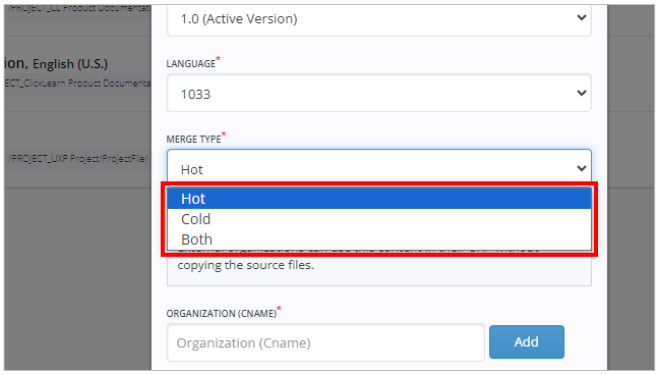
Click on the combo box.



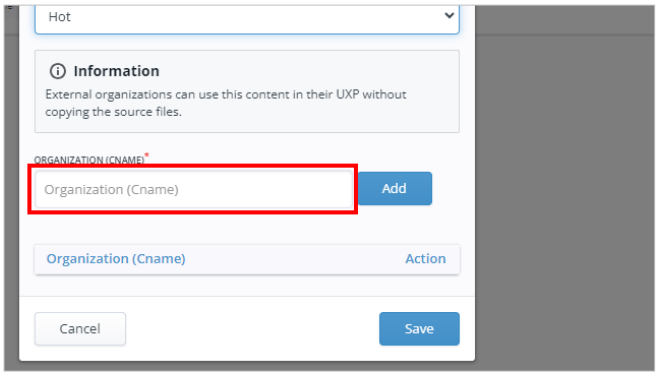
Merge Type: **Hot** merge imports the recordings based on your external structure, allowing you to view them without making any changes.

On the other hand, **cold** merge imports all recordings and files, enabling you to modify and edit them.

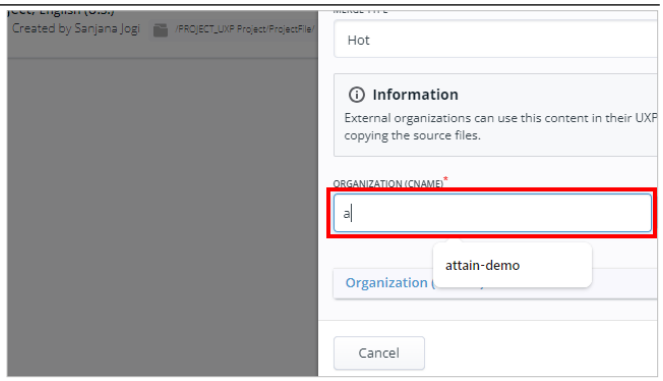
You also have an option to use **both,** which combines the hot and cold merge.



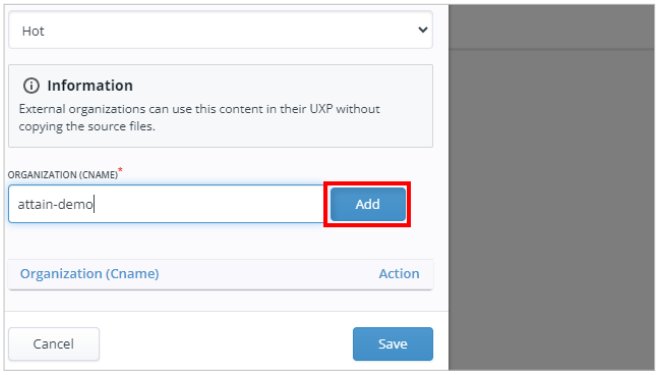
Click on **Organization (Cname).**



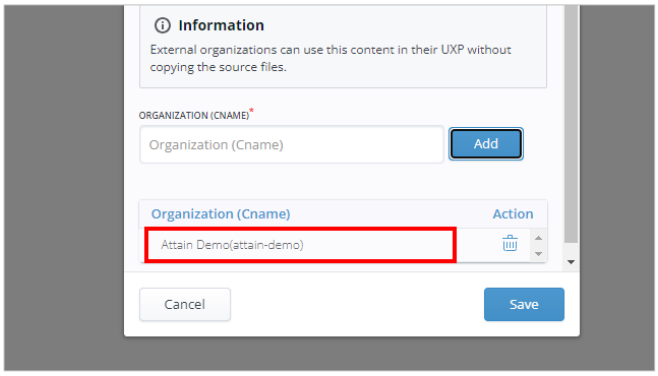
Enter **Organization (Cname)**.
This should be the organization name of the company to which you are sharing the content to be used in UXP.



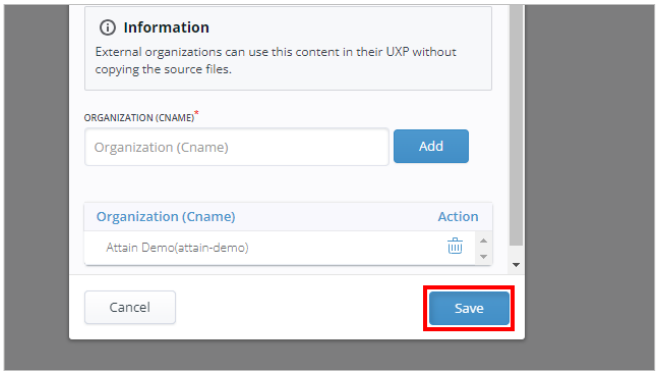
Click on **Add**.



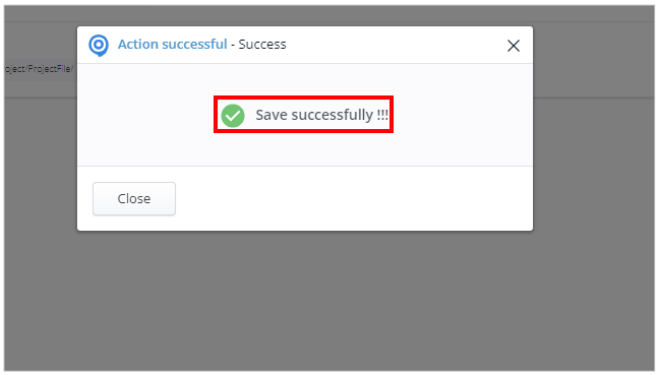
The company Cname **Attain Demo** is created.



Click on **Save.**



This displays the message: **Save successfully**.

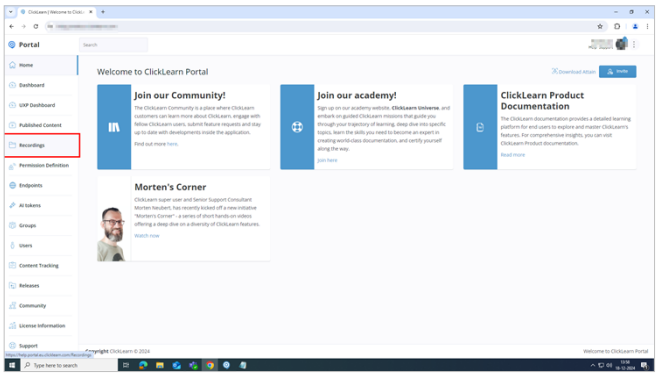


22. Manage Recordings in the Portal

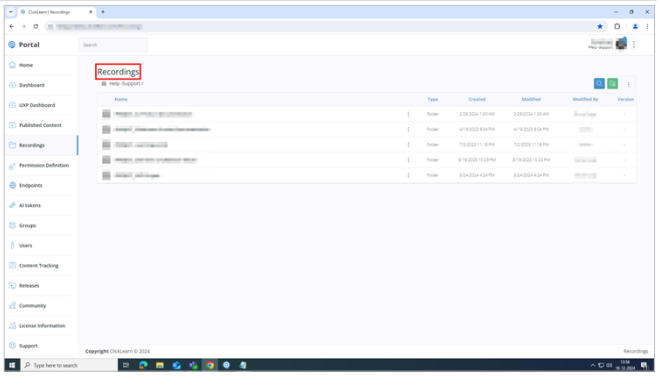
View, organise, and control access to recordings stored in the portal, so content stays accessible to the right authors and protected from unauthorised changes.

22.1.Introduction

Click on the button **Recordings.**



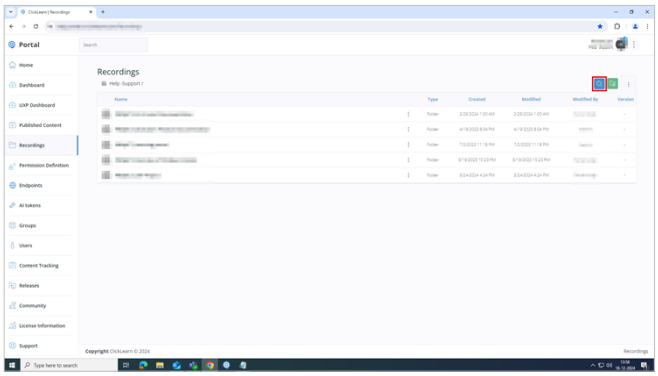
This is how the recording screen appears when you choose recordings.



22.1.1. Overview of recordings

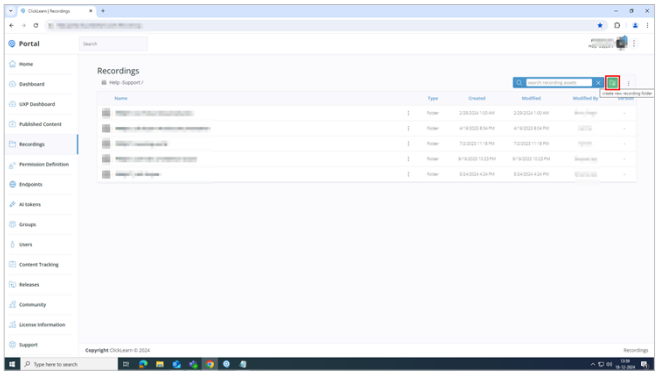
22.1.1.1. Search

Click on the **Search** button to find any recordings you would like to access.

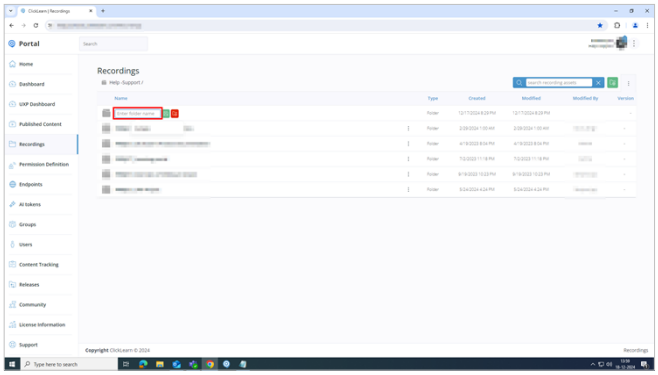


22.1.1.2. Create New Folder

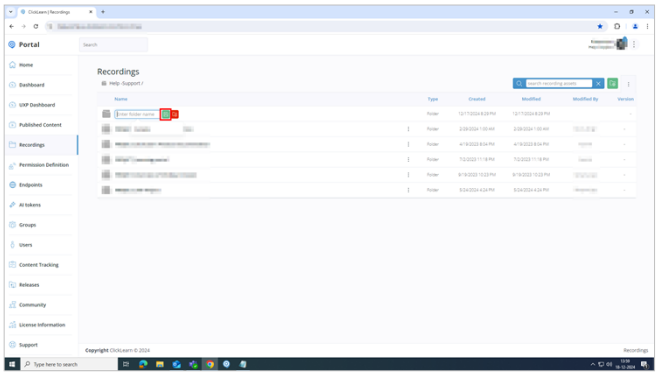
Click the **Create new recording folder** button to create a new folder.



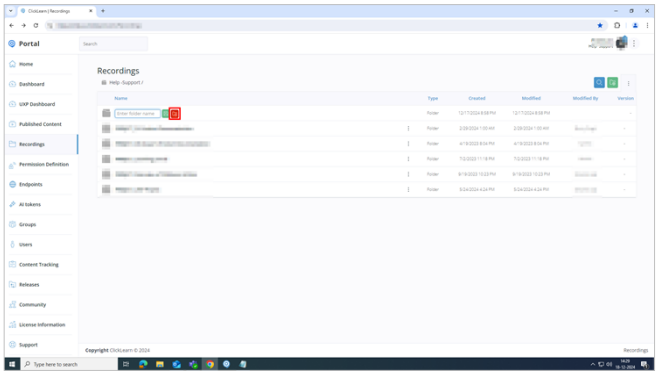
Click on the input field **Enter folder name to** name the folder you create.



Click on the button **Save.**

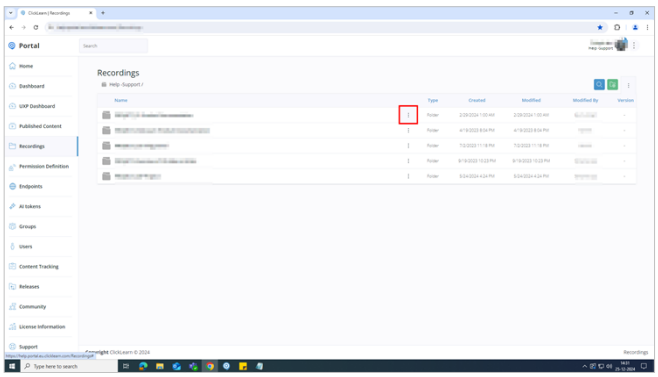


Click on the **remove folder button**.

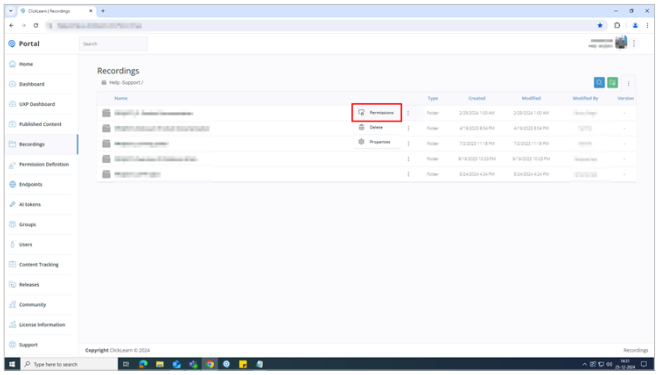


22.1.1.3. Open Menu

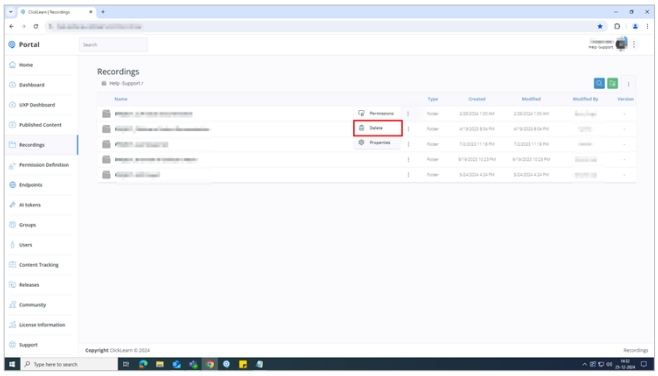
Click on the button **open menu.**



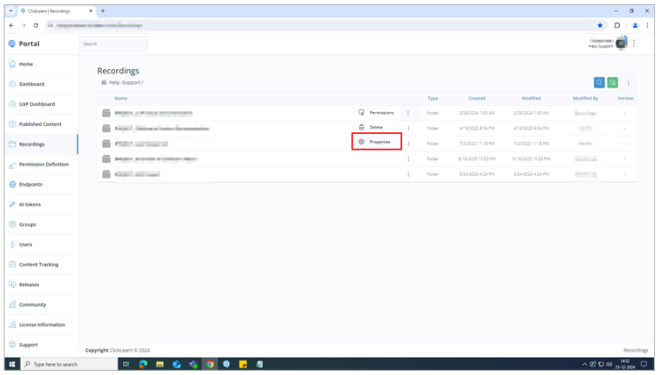
Click on the button **Permissions.**



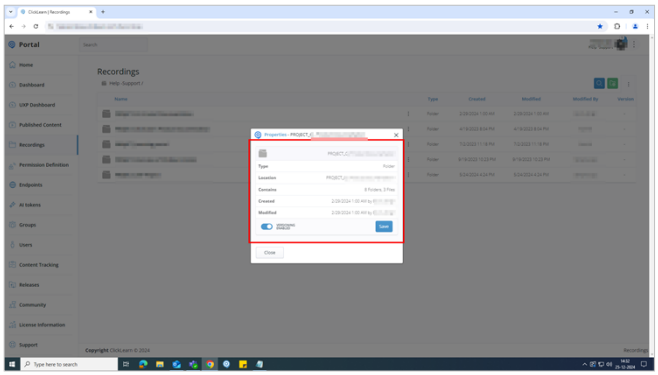
Click on the button **Delete.**



Click on the button **Properties.**

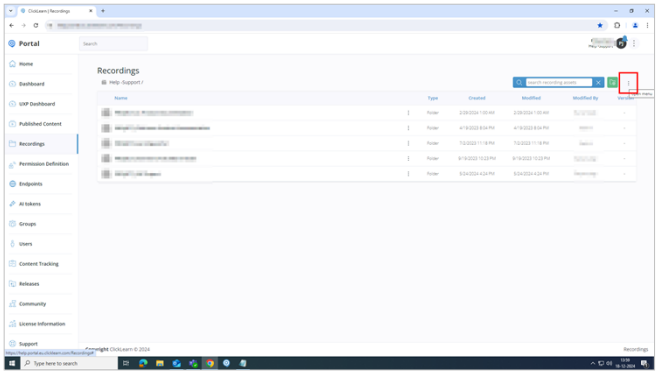


This opens a property pop-up where you can see the project type, location, what it contains, and who created and modified it. You can also see whether the produced version is enabled or not, and you can disable it by toggling off. Click on **Save**.

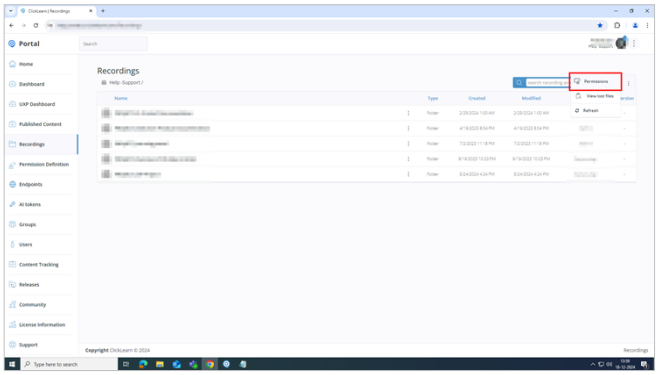


22.1.1.4. Permissions

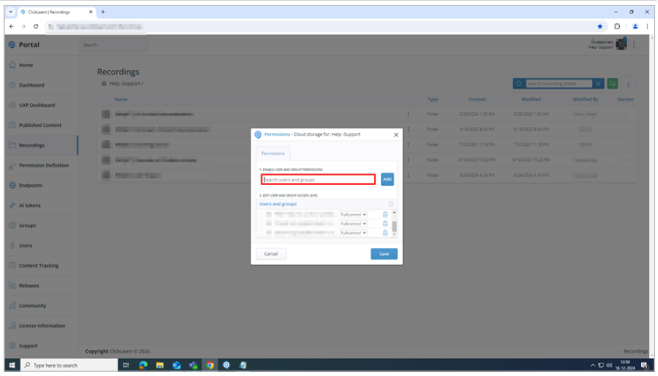
Click the **three-dot button** to open the menu.



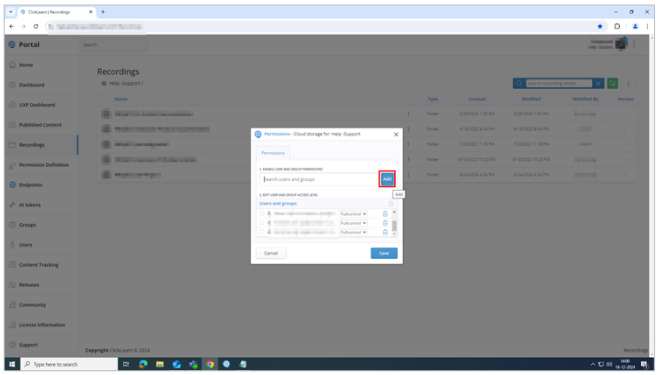
Permissions: This shows your users and group access rights to the folder or recording.



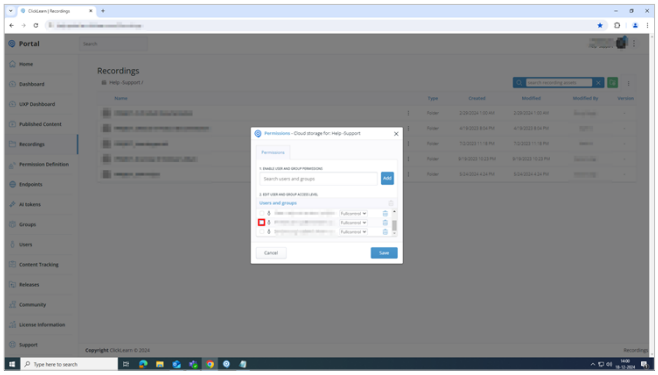
Click on the input field **Search users and groups.**



Click on the button **Add** to enable user and group permissions.

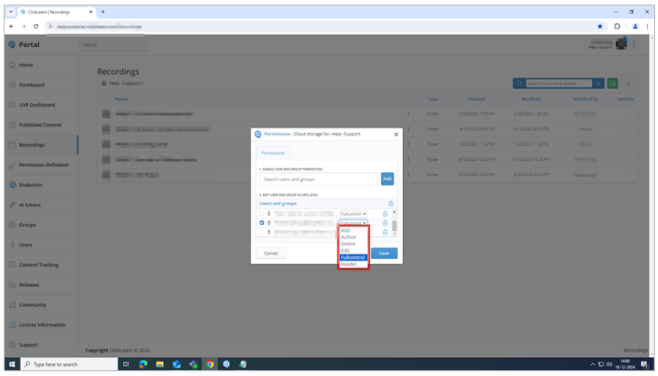


Choose the user you want to edit and specify their group access level.

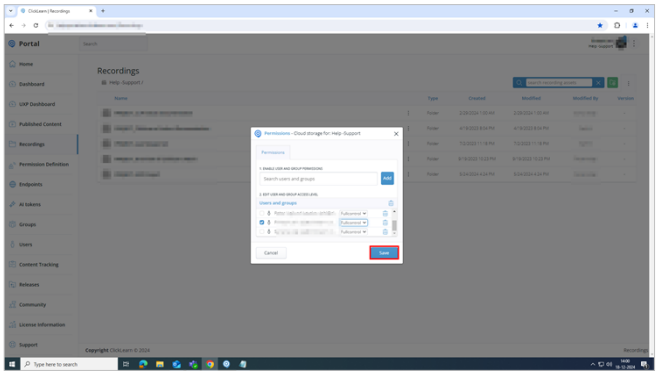


Select the option from the dropdown to provide access level.

Click on the dropdown item: **Fullcontrol**.

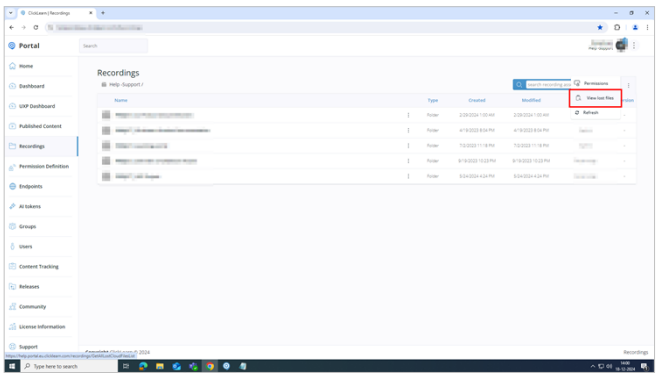


Click on the **Save** button.

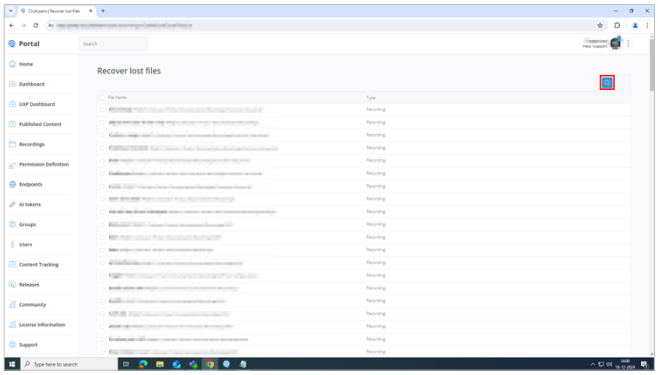


22.1.1.5. View Lost Files

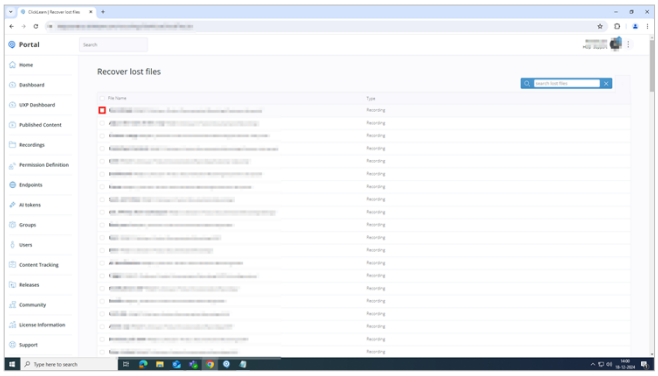
View lost files: To locate any missing files.



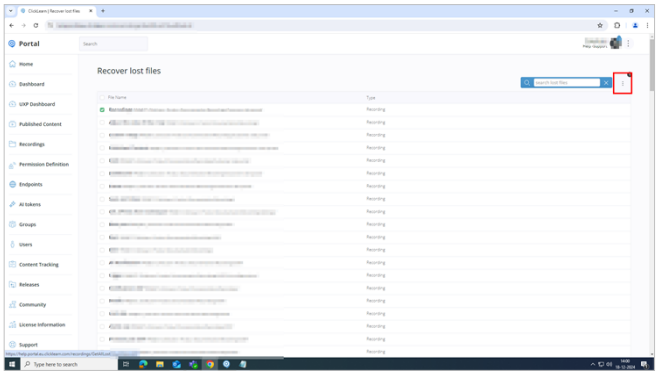
Click on the button **Search** to find lost files.



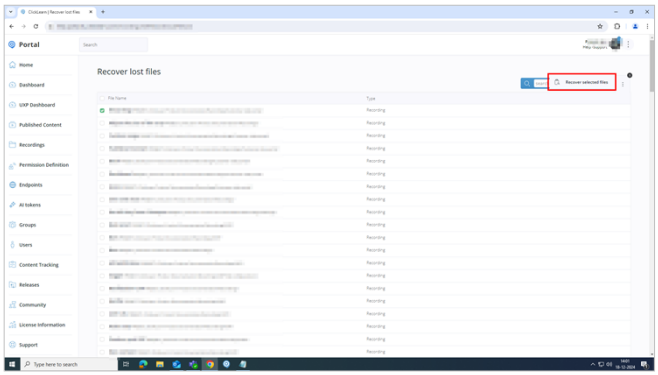
Select any file from the list that you would like to recover.



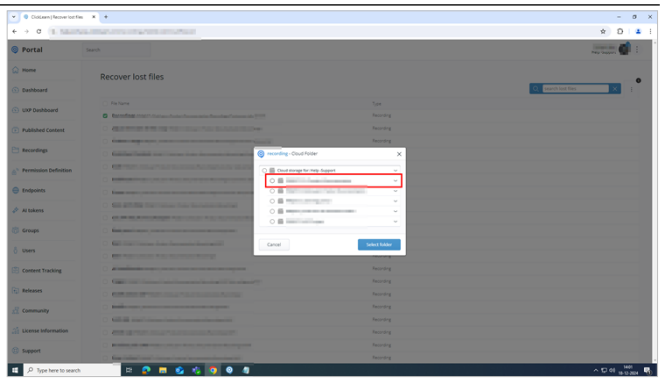
Click on the **three-dot menu.**



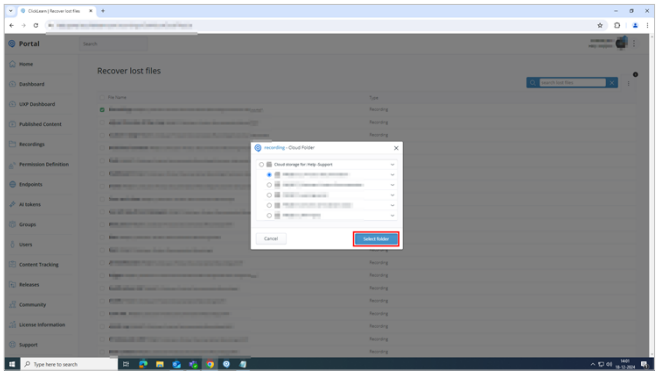
Click on the button **Recover selected files** to recover multiple lost files.



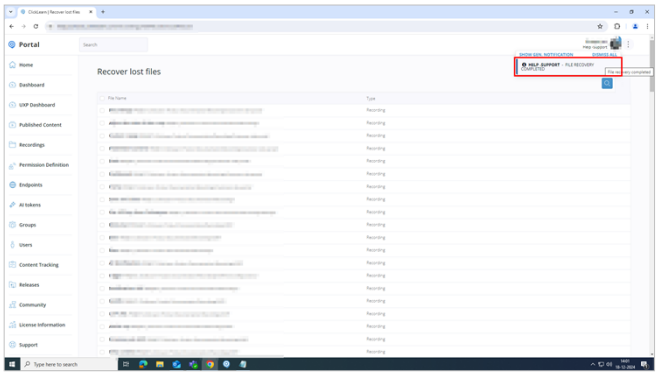
Choose the folder where you wish to add lost files.



Click on the button **Select Folder**.

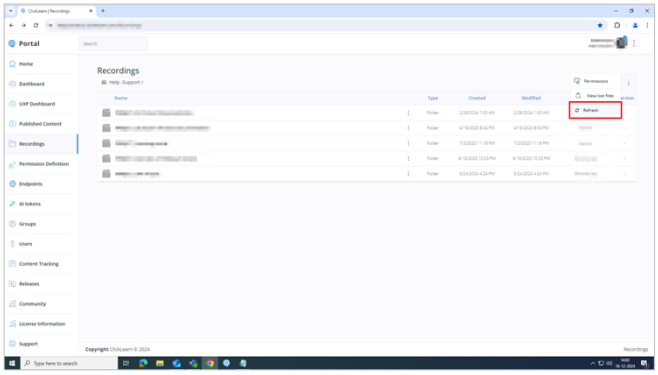


Once recovery is completed, you will be notified in the notification.



22.1.1.6. Refresh

Refresh: To reload or update what is displayed or stored on a page.



23. Create and Manage Permission Definitions

Create, edit, and delete permission definitions in ClickLearn to control user actions, whitelist UXP URLs, and import access rules via Excel or CSV.

23.1.Permission Definition

23.2.Introduction

Permission definitions specify what actions a user can perform and what information they can access within a given environment. They are a set of rules or settings that control user capabilities, ensuring only authorized individuals can carry out certain tasks (like creating content, editing existing assets, or managing system settings).

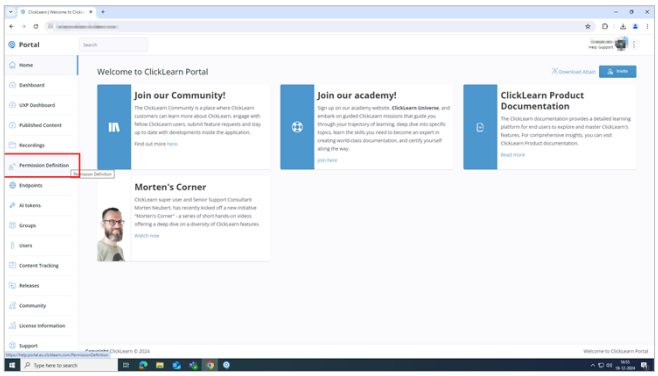
23.2.1. Why Are Permission Definitions Used?

Permission definitions serve several key purposes:

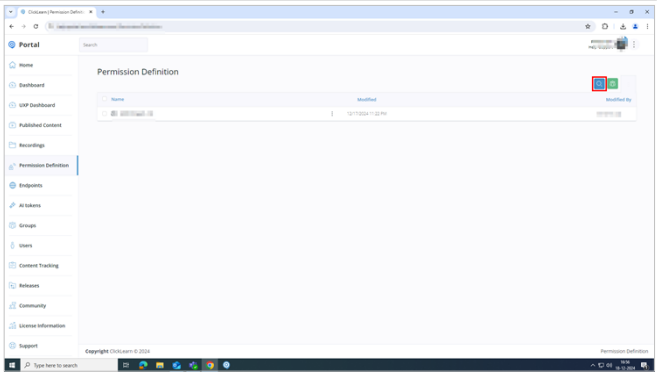
- **Security**: Protect sensitive information and system functionality by restricting access.

- **Collaboration Control**: Allow team members to contribute according to their responsibilities without overstepping boundaries.
- **Process Integrity**: Prevent accidental or unauthorized changes that might impact project quality or data accuracy.
- **Auditing**: Easily track actions based on user roles, aiding in troubleshooting and compliance.

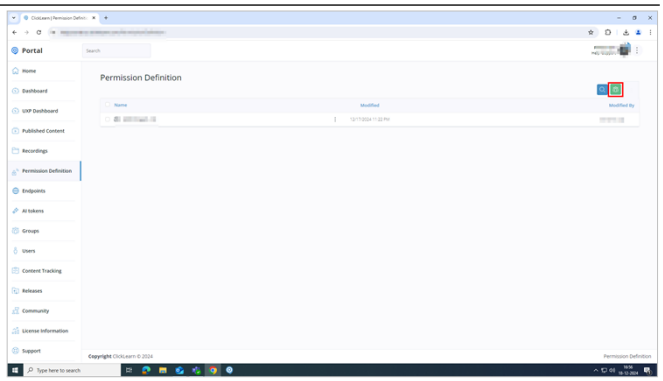
Click on the button **Permission Definition.**



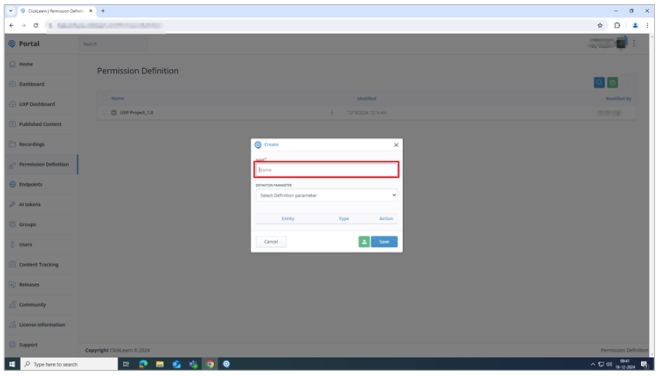
Search: Use the Search option to find your project by typing its name.



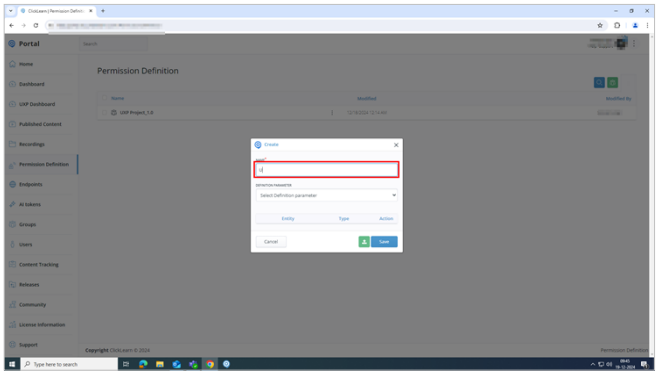
Click on the button **Create** to set the permission definition.



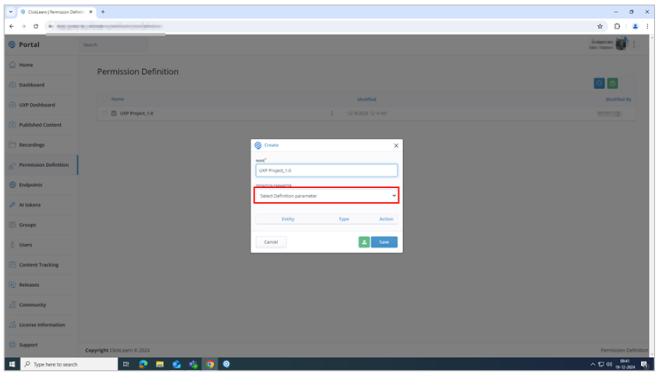
Click on the input field **Name.**



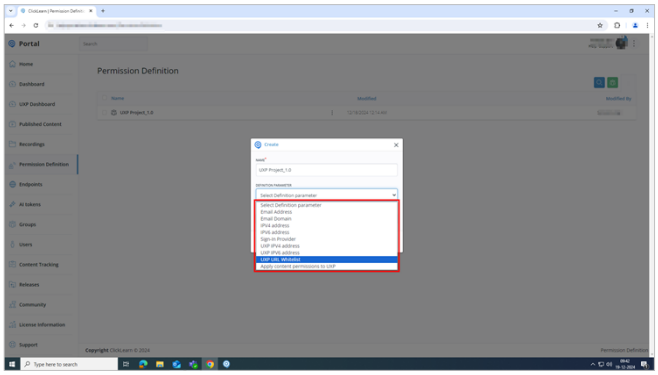
Enter **Name**.



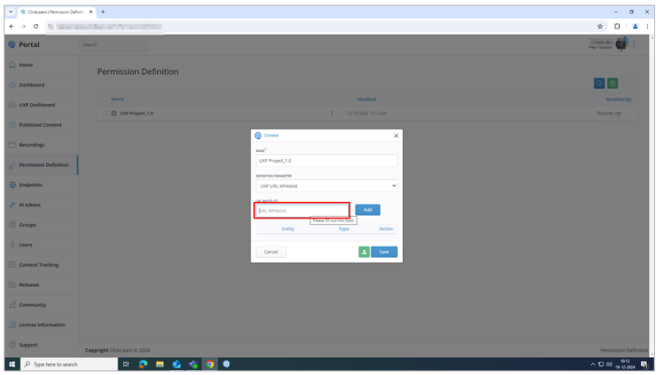
Click on the combo box to select the Definition parameter**.**



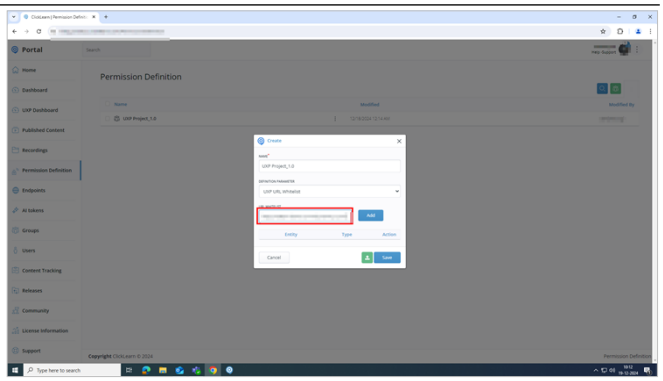
Click on the item **UXP URL Whitelist** in the list.



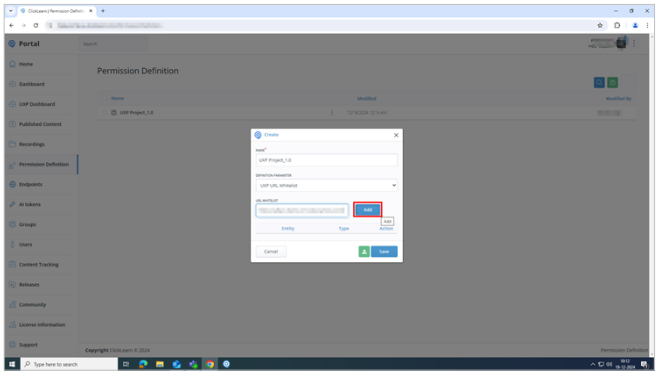
Click on the input field **URL Whitelist.**



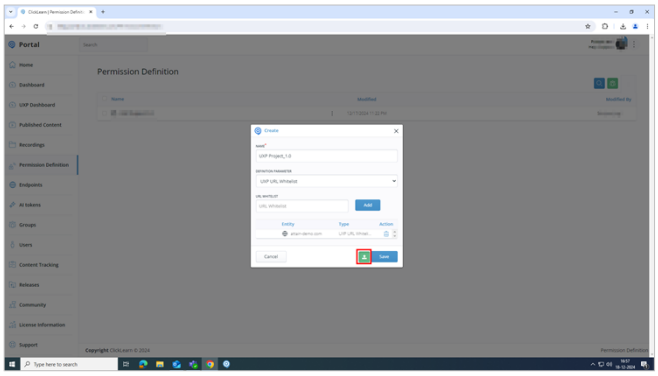
Press **CTRL+v**.



Click on the button **Add.**

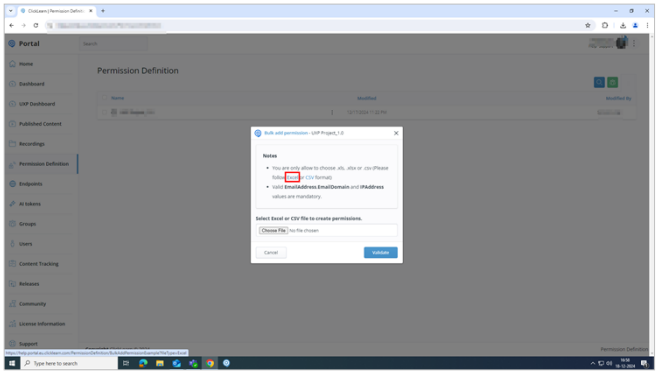


Click on the button **Upload File.**

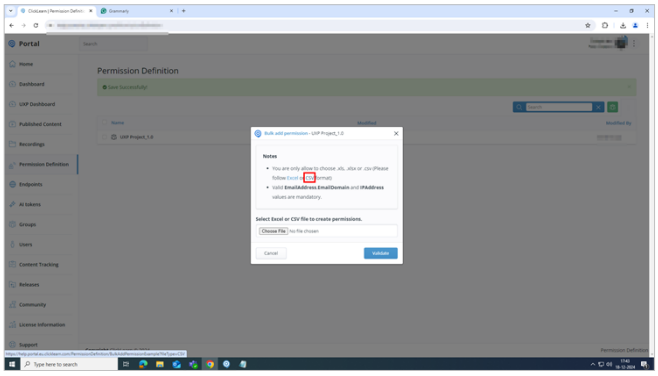


23.2.1.1. Upload Excel or CSV File

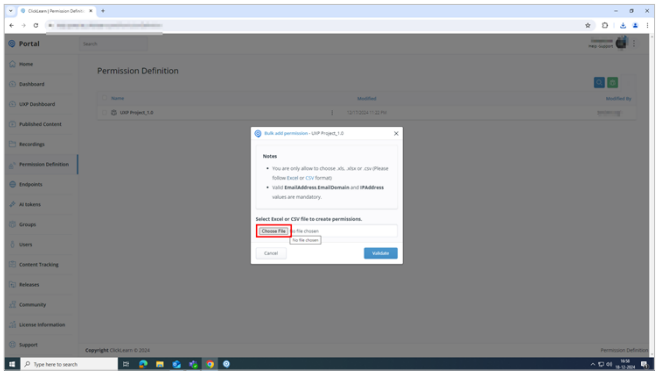
Click on the button **Excel** to download Excel File.



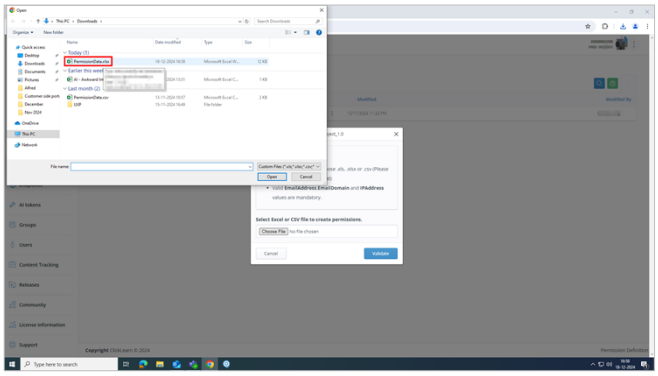
Click on the button **CSV** to download CSV File.



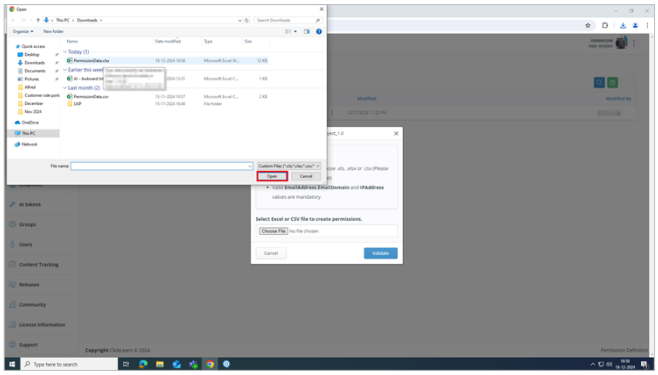
Choose downloaded **Excel or CSV** File from the local machine.



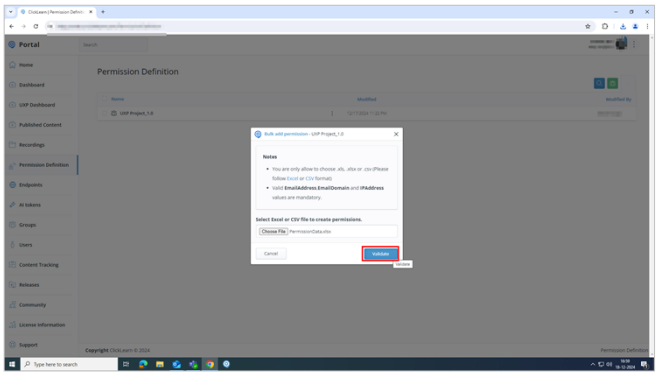
Select the Excel or CSV File to import.



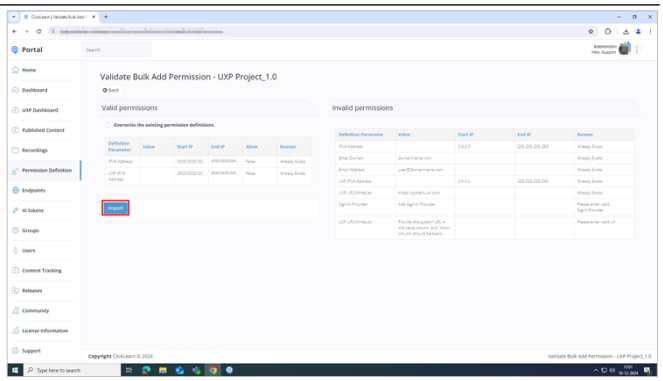
Click on the **Open** button.



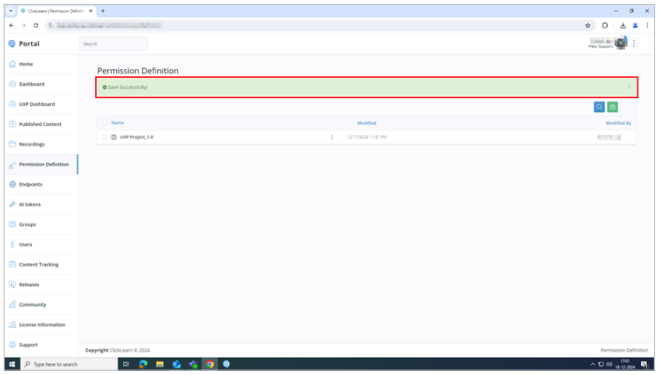
Click on the button **Validate.**



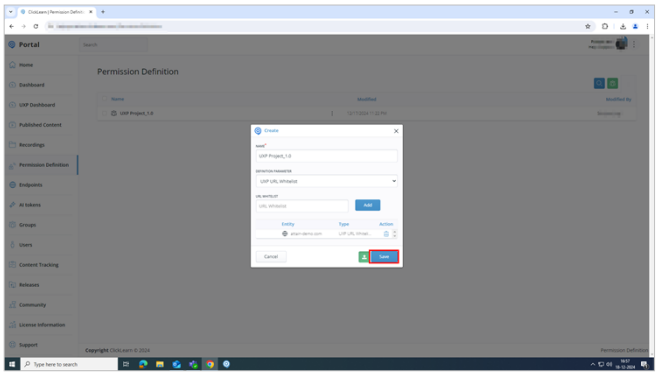
Click on the button **Import.**



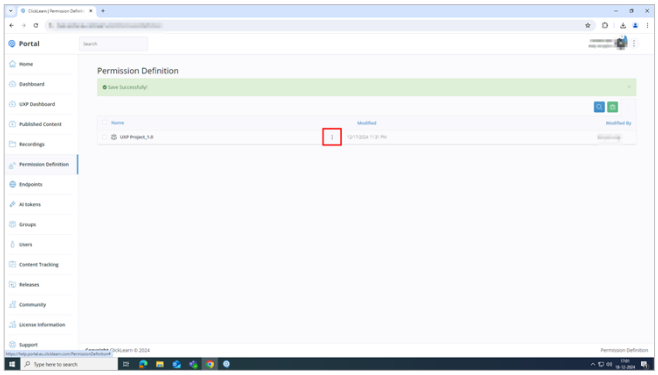
After importing the Excel or CSV File, a pop-up message at the top displays, showing save successfully.



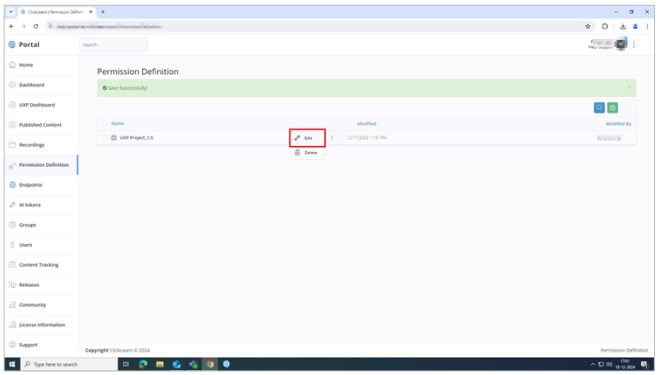
Click on the button **Save**.



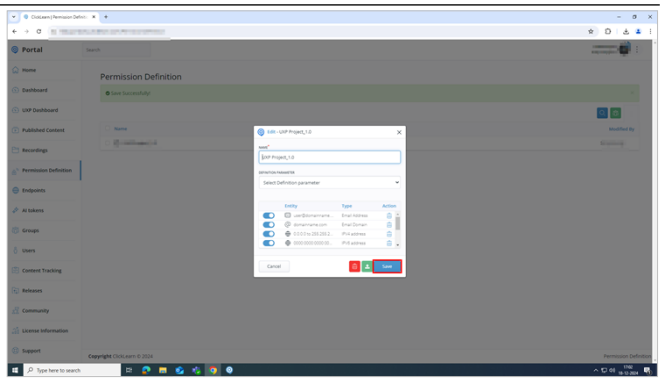
Click on the **three-dot button** to open the menu.



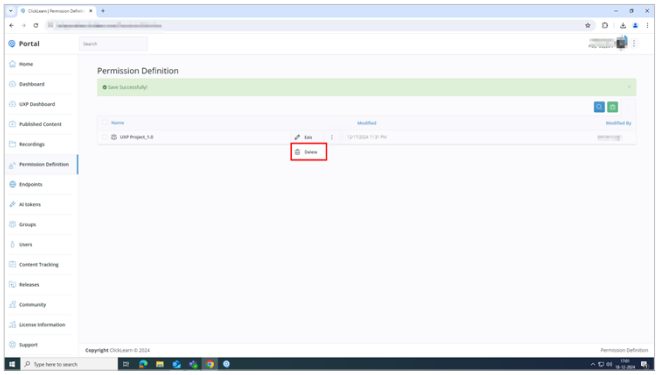
Click on the button **Edit.**



Edit the information you would like to change and hit button **Save**.



Click on the button Delete.



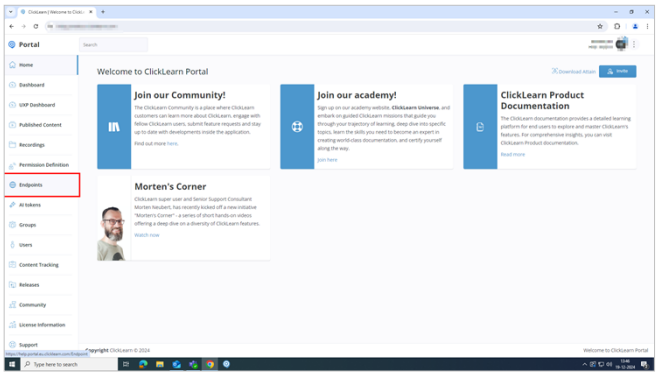
24. Manage Endpoints

Control the stable URLs through which users access published content, understanding endpoints prevents broken links when content is re-published.

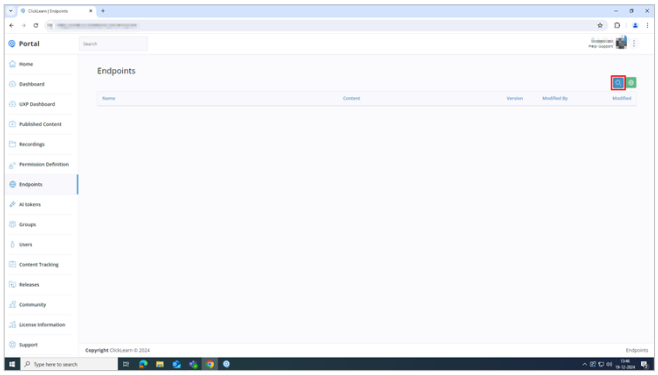
24.1.Introduction

You can now configure an endpoint name and link it to your produced content. Once linked, your content can be accessed using the **endpoint link**. Additionally, as long as the endpoint link remains the same, we can redirect it to the content produced by other projects.

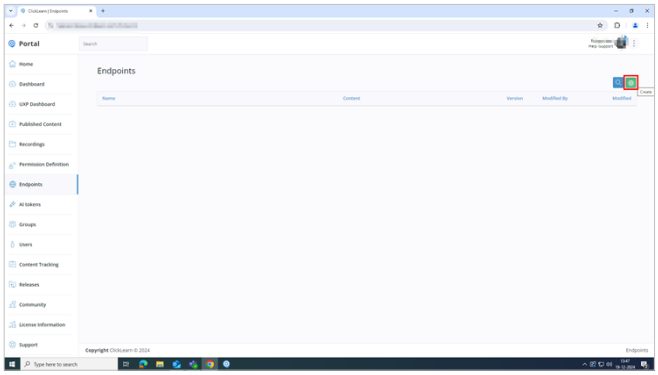
Click on the button **Endpoints.**



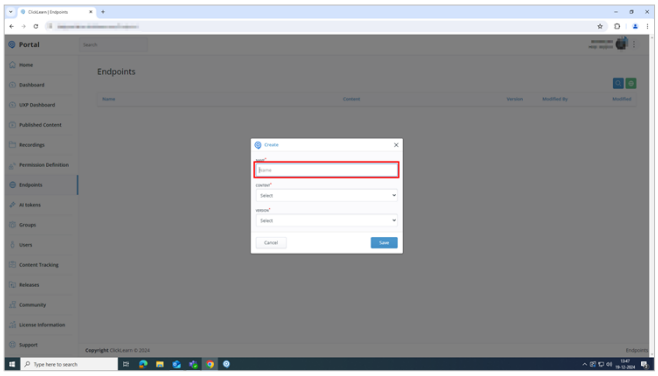
Search: Search the project for which you want to create endpoints.



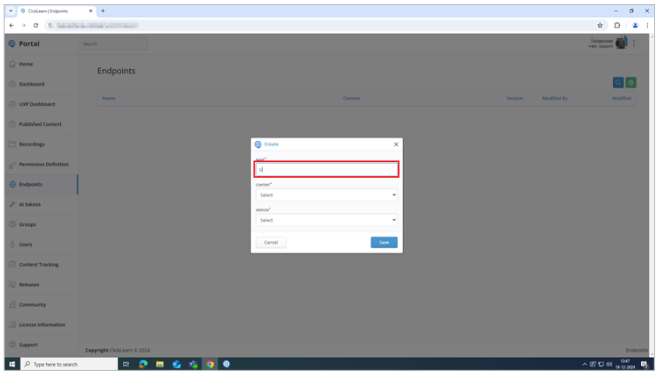
Click the **Create** button to generate endpoints.



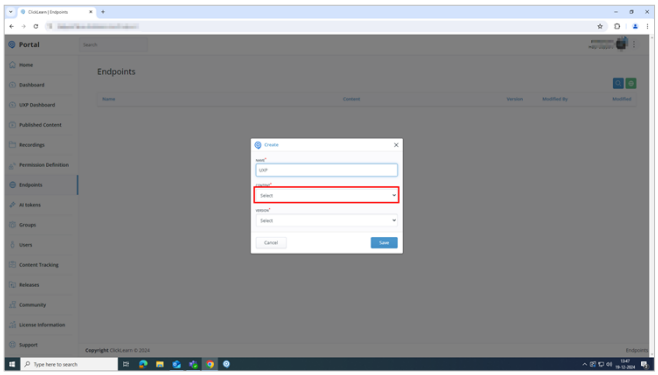
Click on the input field **Name.**



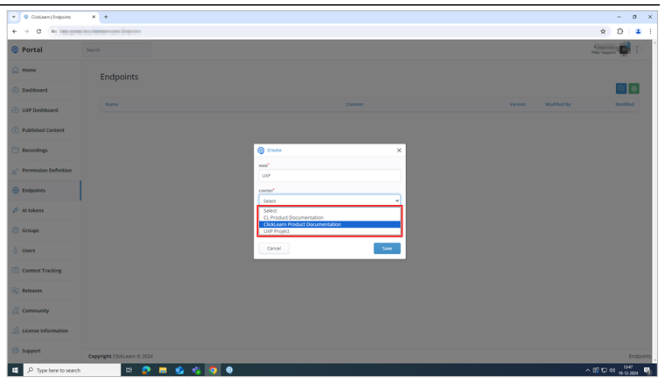
Enter **Name**.



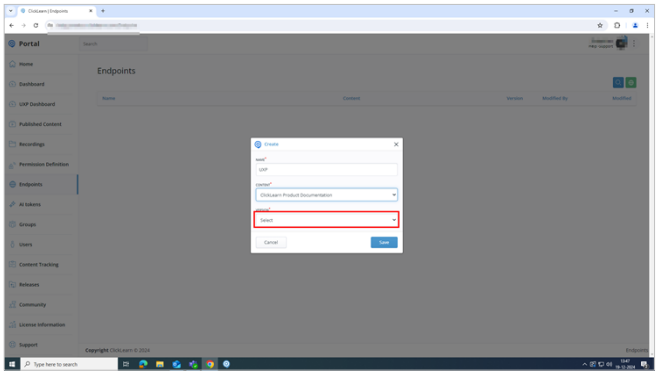
Click on the combo box.



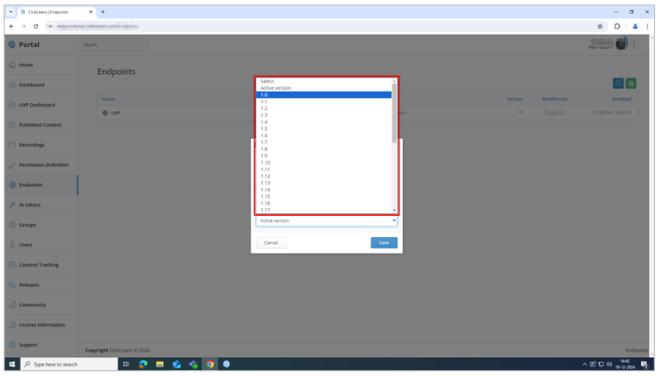
Click on an option from the list.



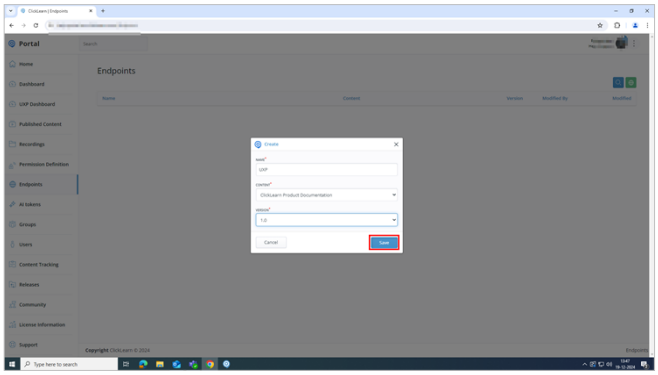
Click on the combo box.



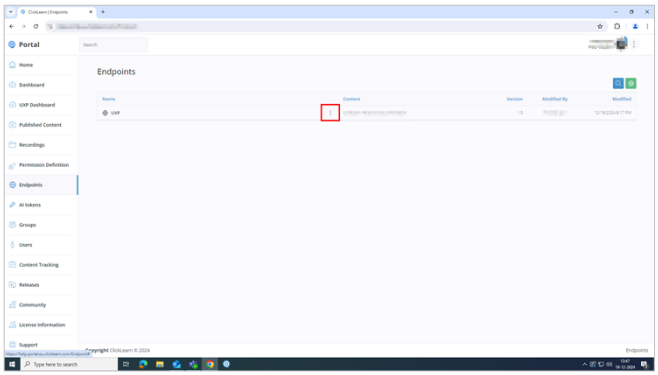
Click on an option from the list.



Click on the button **Save.**

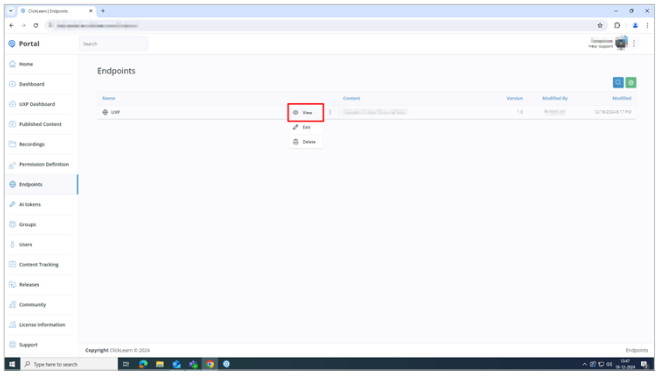


Click on the **three-dot button** to open menu.



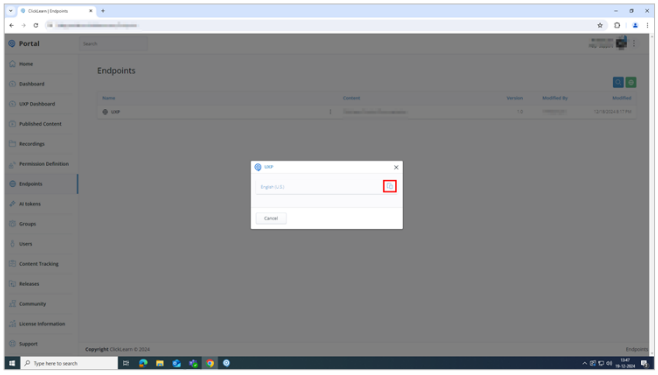
24.1.1. View

Click on the button **View.**



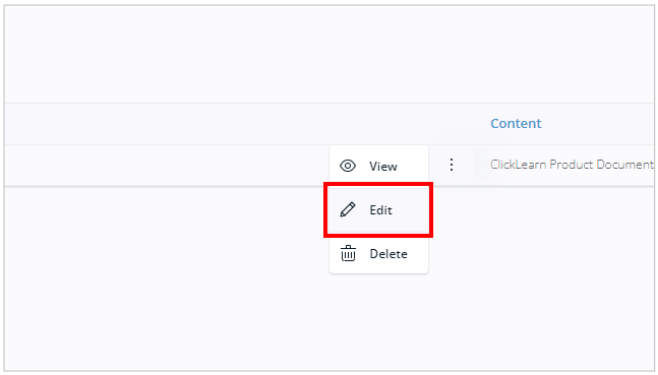
This will open a pop-up window.

Click on the button **Copy** to preview content.

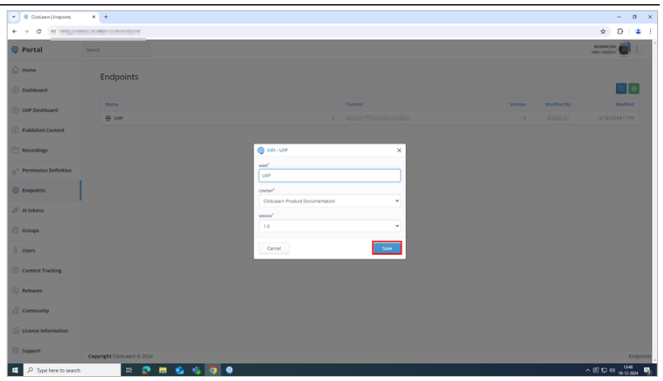


24.1.2. Edit

Click on the button **Edit**

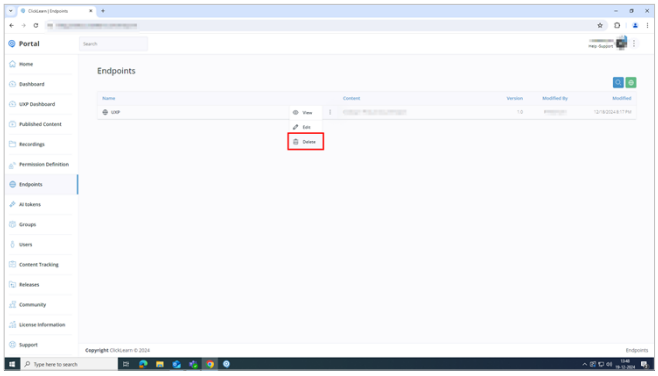


Edit the name, project, and published version, and hit **Save** to make changes.

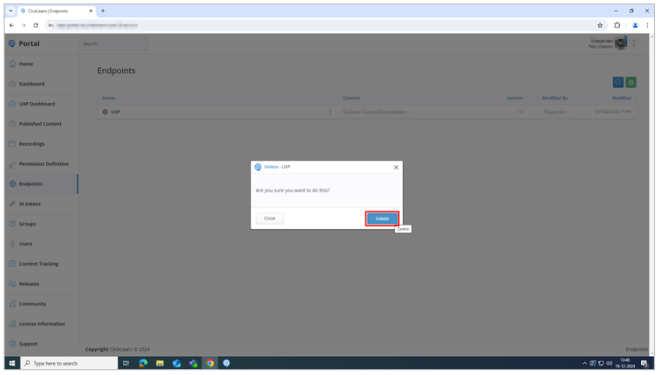


24.1.3. Delete

Click on the button **Delete.**



This will ask you for confirmation to delete. Click on **Delete**.



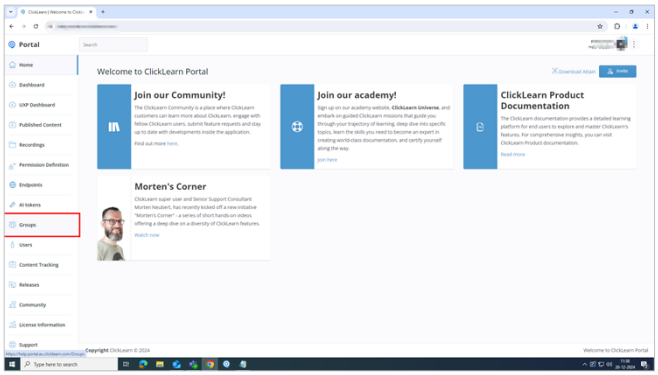
25. Create and Manage Groups

Organise users into groups to manage content permissions efficiently, assigning permissions to a group once applies to all members, removing the need for individual user configuration.

25.1.Introduction

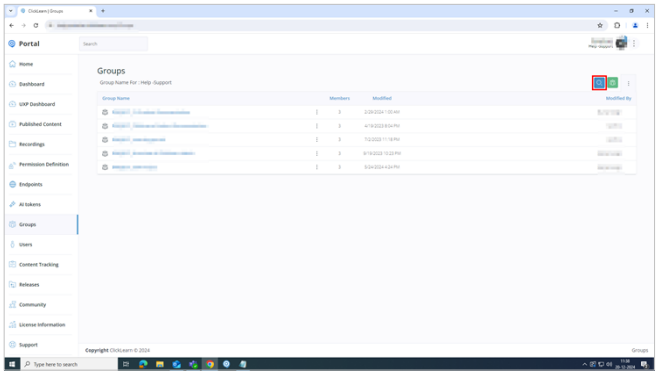
Groups are created to assign varying levels of access to users within a project. By default, each project includes three user groups with different access levels: administrators, authors, and readers.

Click on the button **Groups.**



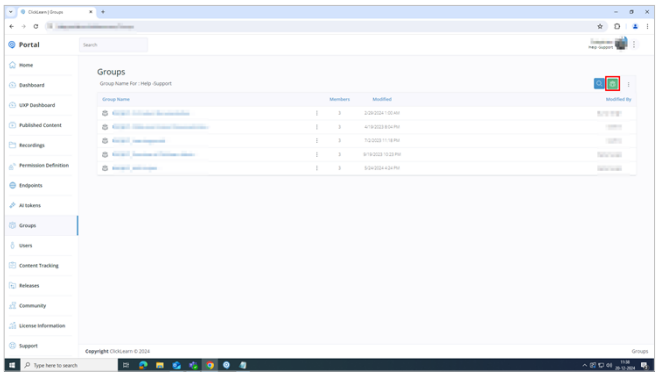
25.1.1. Search

Search: The search is used to see group names, the number of members in a group, and who modified it.

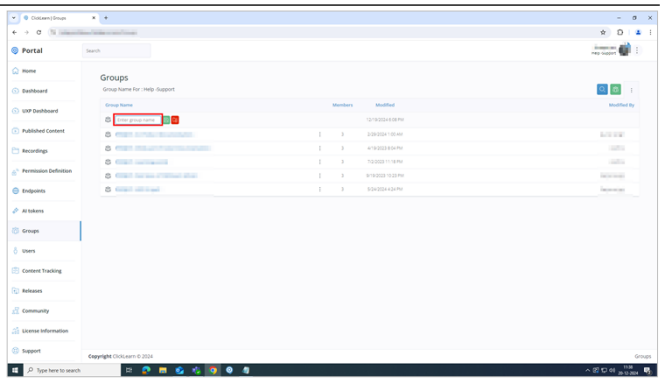


25.1.1.1. Create a New Group

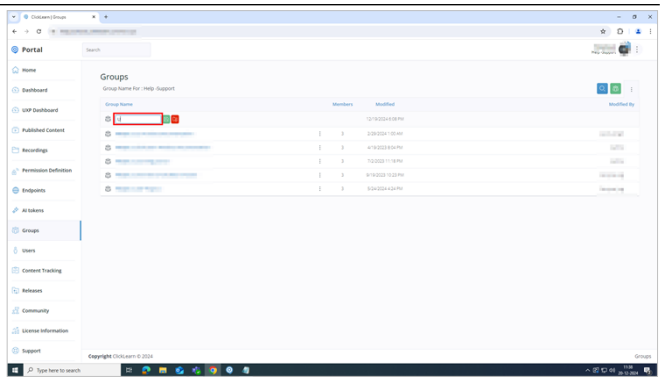
Click on the button **create new group.**



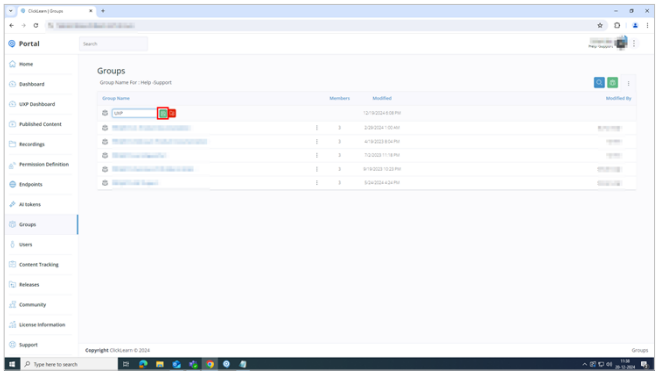
Click on the input field **Enter group name.**



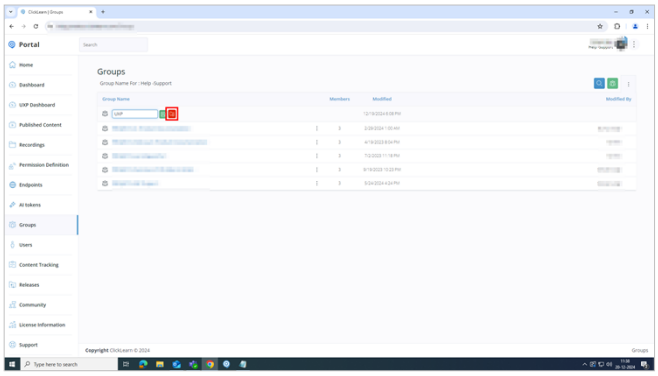
Enter **Enter group name**.



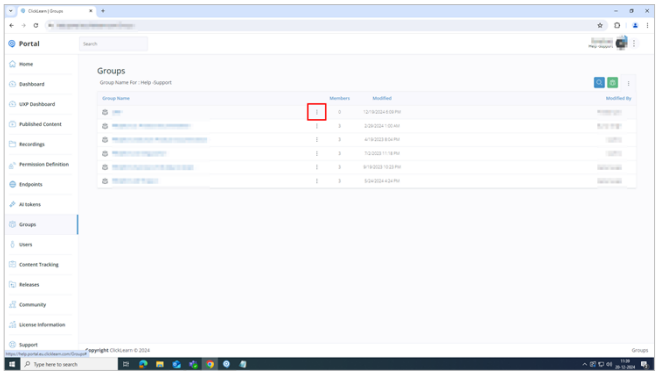
Click on the button Save.



Click on the **button remove folder** to delete the created group.



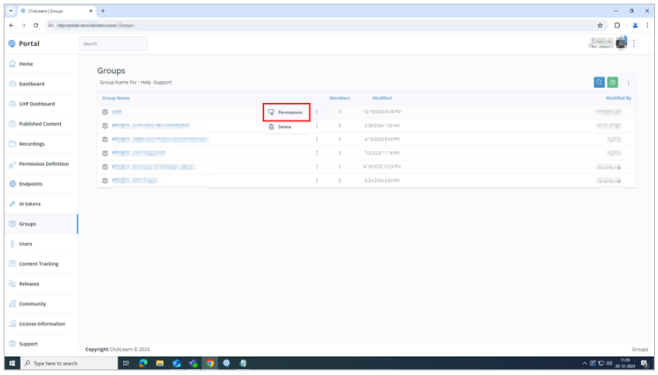
Click on the button **open menu.**



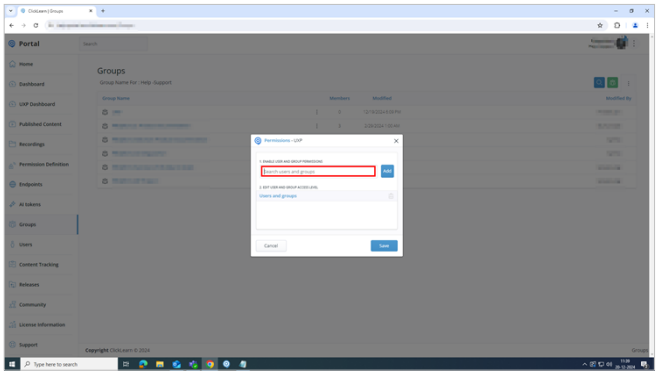
25.1.2. How to Assign Permissions

Permissions can be set on each folder in portal for restricting access.

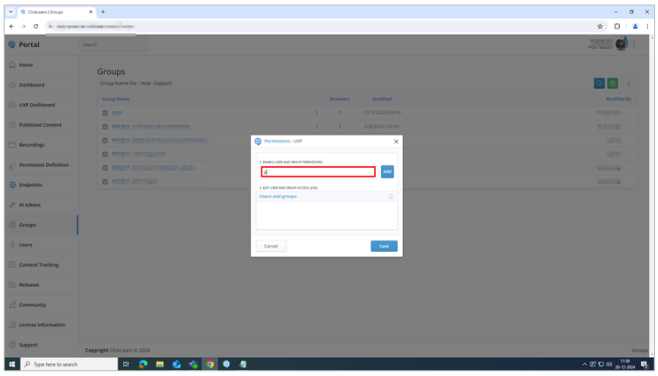
Click on the button **Permissions.**



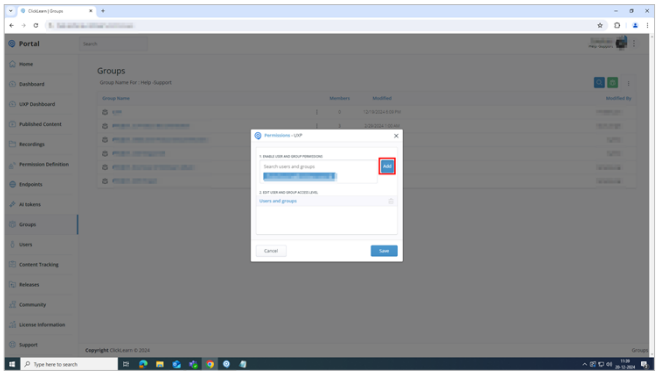
Click on the input field **Search users and groups.**



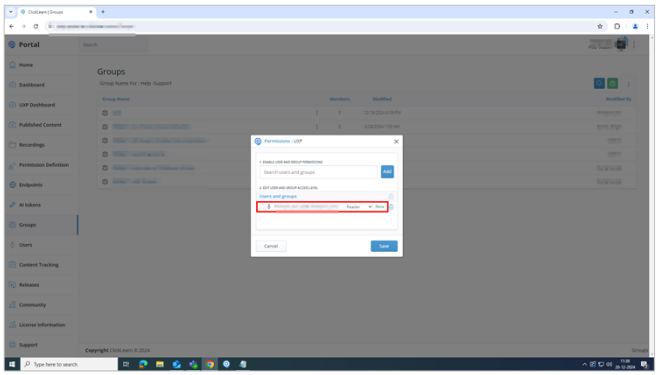
Enter **Search users and groups**.
Search for the users and groups to assign permissions.



Click on the button **Add.**

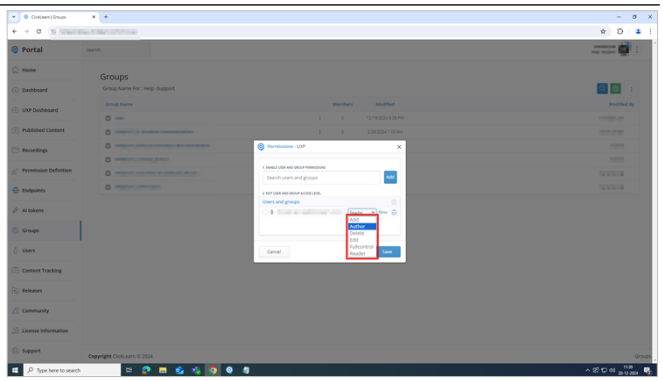


Once you add the user, you will be able to see them here.



Click on an option from the list.

Here, you can choose any role you wish for the user selected.

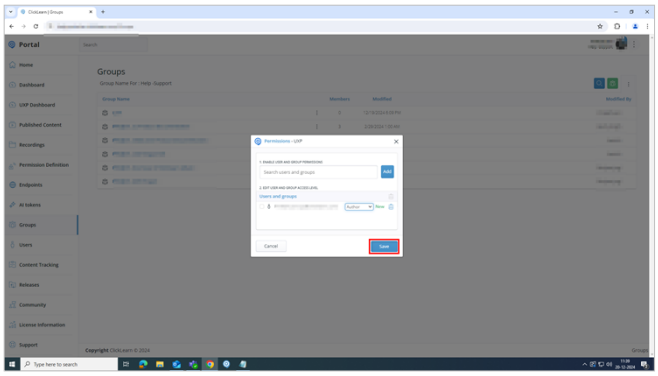


- **Add:** Users with add permissions can create or add items in the assigned folder.
- **Author:** Authors can add, edit, and delete content within the folder. They have the ability to upload files and make changes but cannot manage folder settings or permissions.
- **Delete:** Users with delete permissions can

permanently remove files or content from the folder but cannot make other changes unless they have additional permissions.

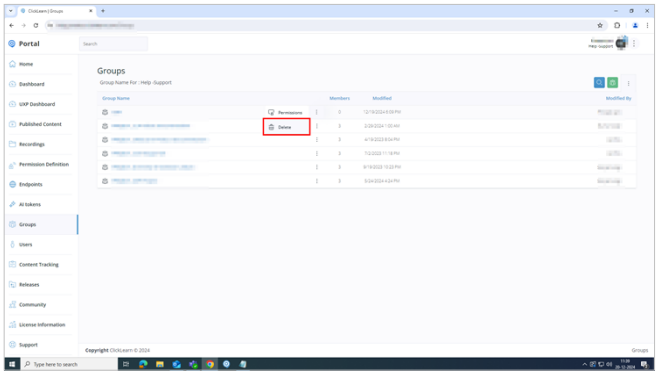
- **Edit:** Users with edit permissions can make changes or update existing content but cannot delete files or manage settings.

Click on the button **Save.**



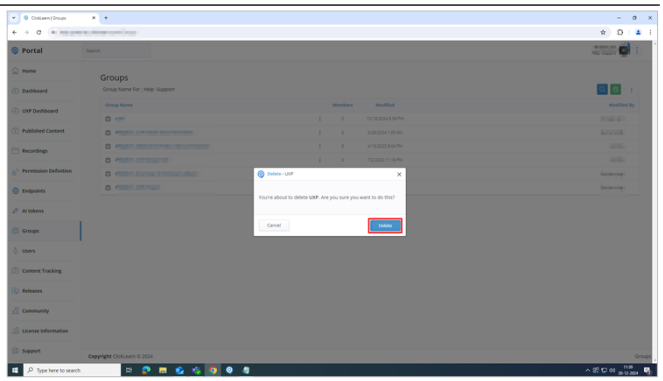
25.1.3. Delete

Click on the button **Delete.**



This will prompt you to confirm whether you want to proceed with the deletion.

Click on **Delete**.

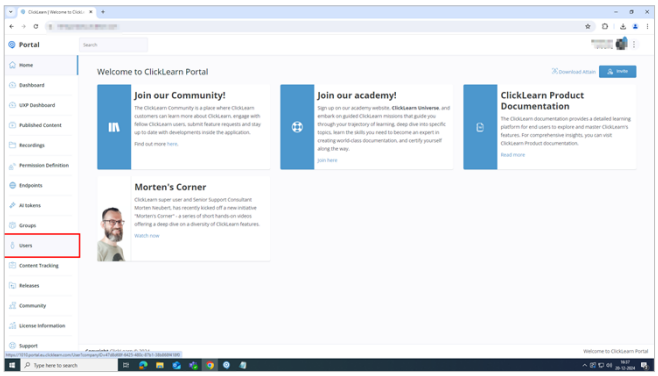


26. Users

Manage everyone who touches your ClickLearn environment, from choosing the right user type (Authors consume licensed authoring seats, Content Users don't) to adding, editing, and removing both the authors who create recordings and the content users who consume published content, so licence seats are used correctly and access stays accurate as your organisation changes.

26.1.Introduction

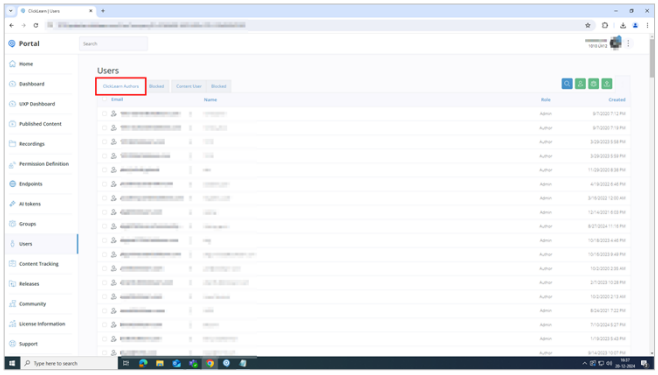
Click on the button **Users.**



26.1.1. ClickLearn Authors

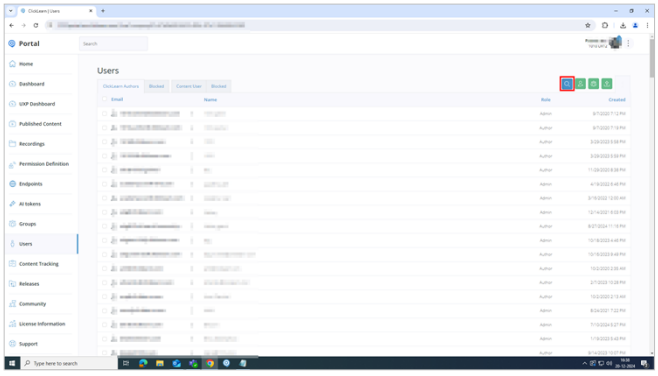
Click on the button **ClickLearn Authors.**
Here is a list of ClickLearn Authors, indicating their roles as either Admin or Author and the date the user was created.

Note: When creating a user, ensure that the same user cannot have different roles. Each user must be unique in their role.



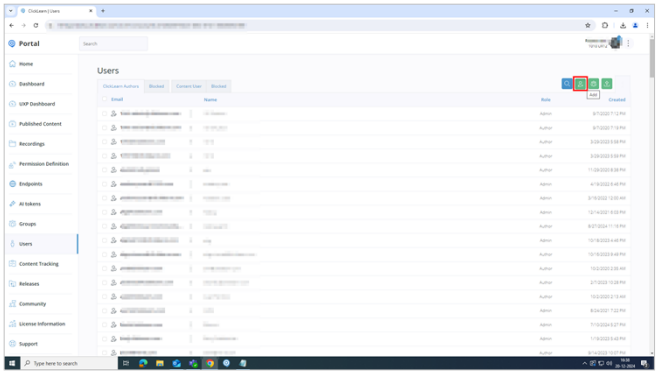
26.1.1.1. Search

Search: To search for users you created in the past and check their assigned roles.

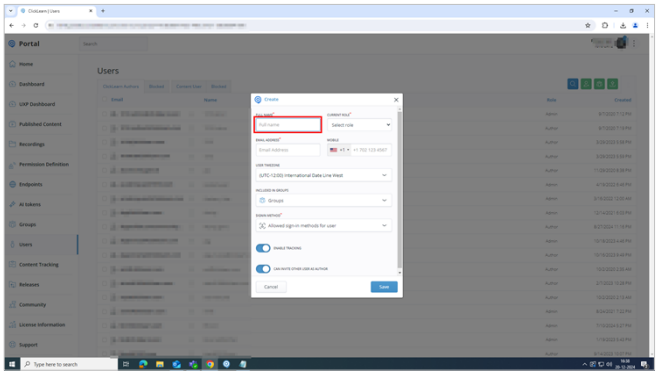


26.1.1.2. Add User

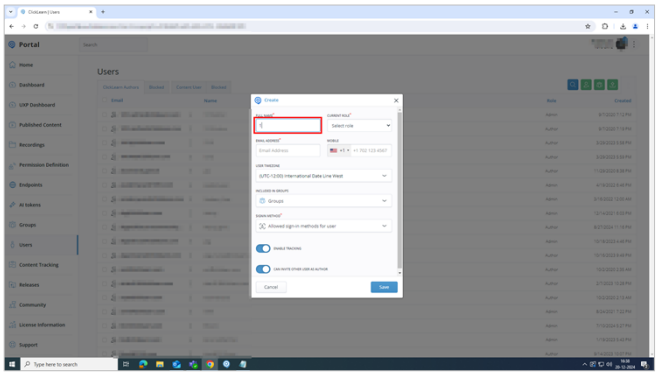
Click on the button **Add.**



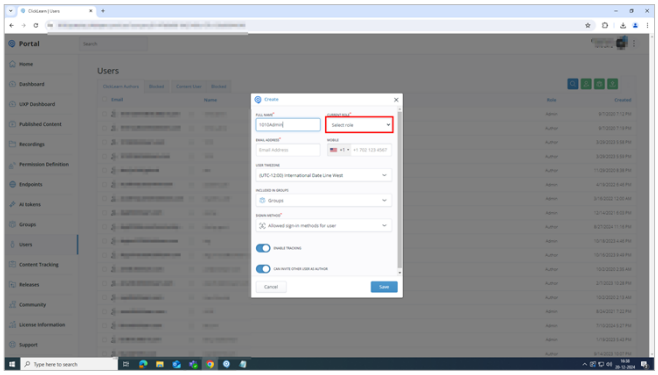
Click on the input field **Full name.**



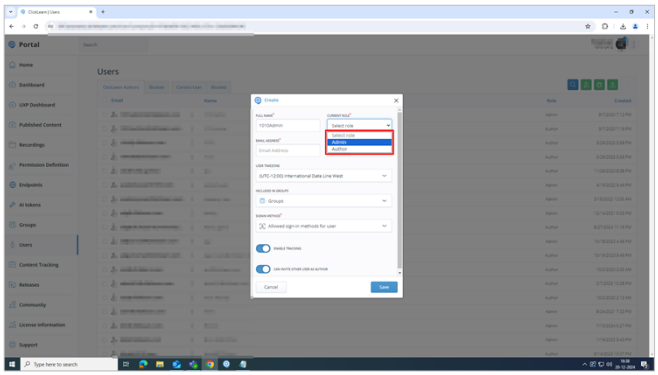
Enter **Full name**.



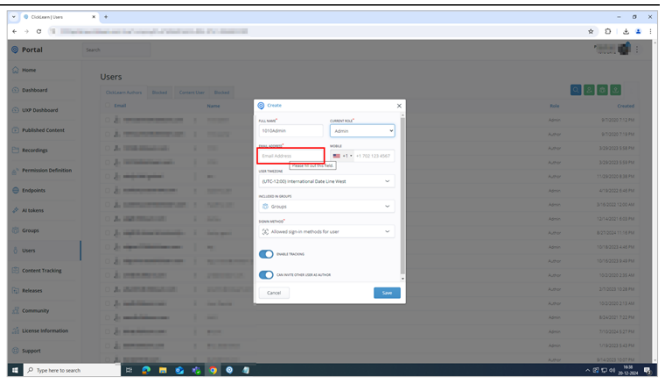
Click on the **combo box**.



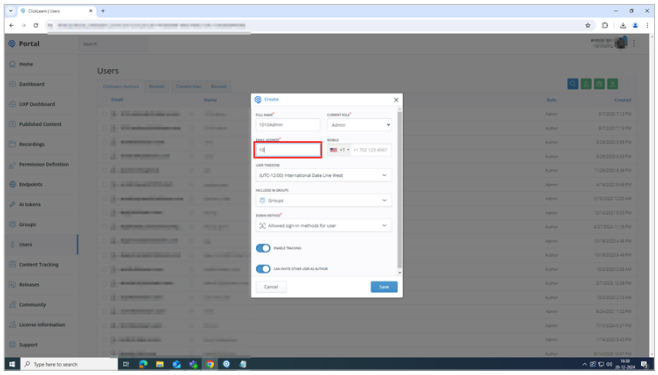
Select a role from the dropdown as the current role, either **Admin** or **Author**.



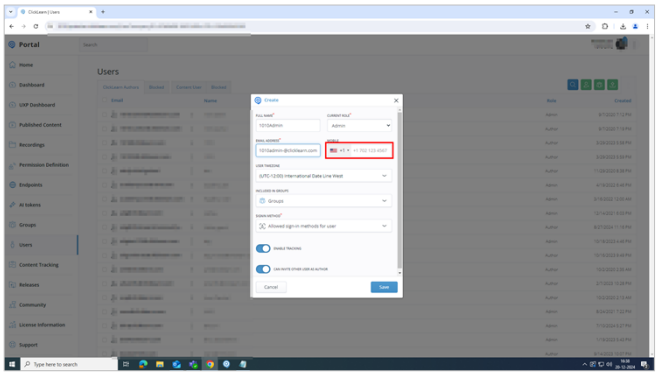
Click on the input field **Email Address.**



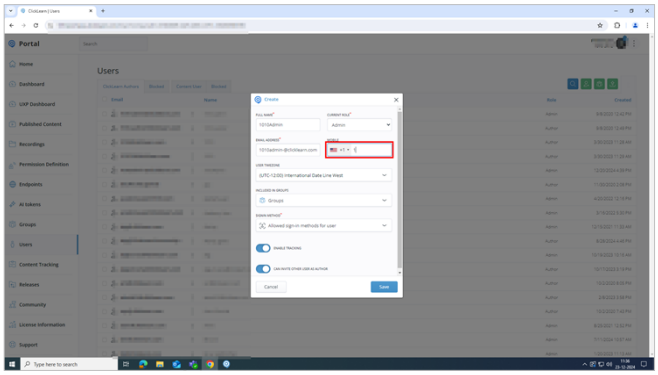
Enter **Email Address**.



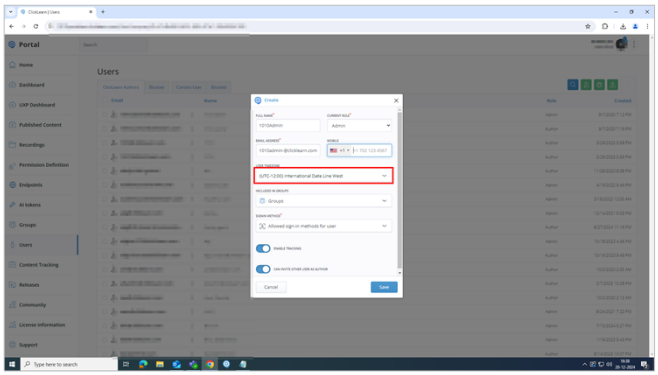
Click on the item **mobile**.



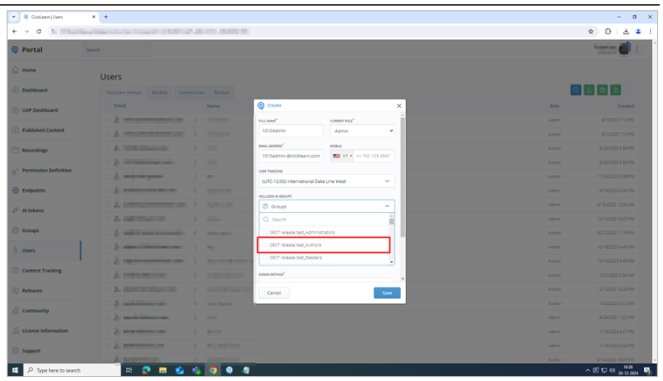
Enter **Mobile**.



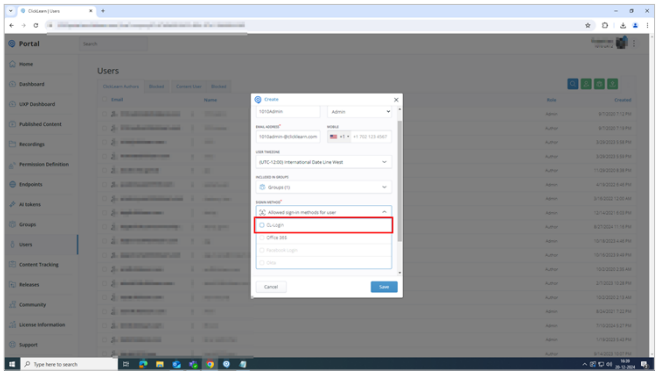
Click on the **user timezone** from the dropdown menu.



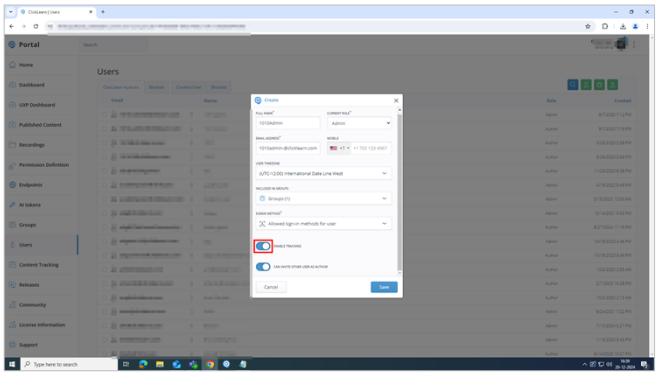
Click on the **Groups** dropdown menu to select an available group.



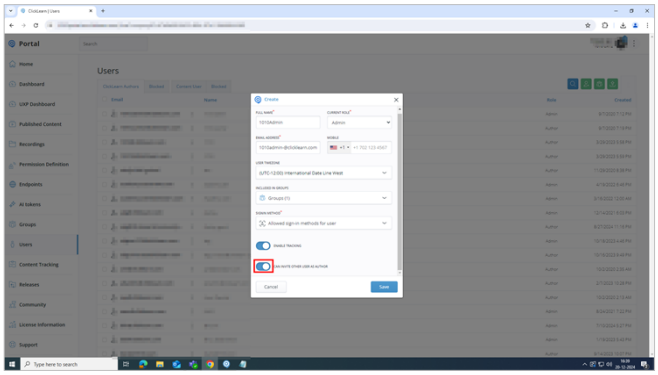
Click on the **sign-in method** for the user.



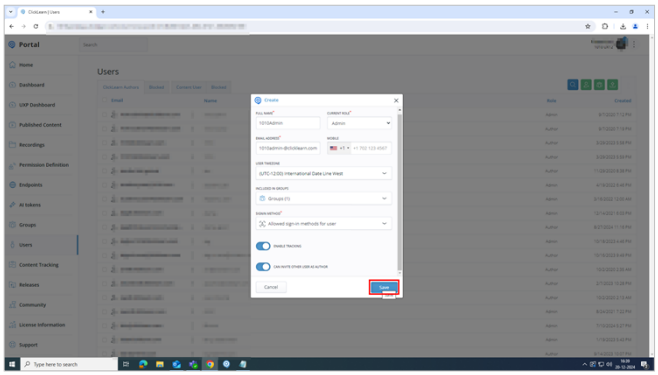
Click the toggle to **enable** or **disable** user tracking. By toggling this option, you can track the user.



Click on **toggle on/off** to Invite other user as Author.

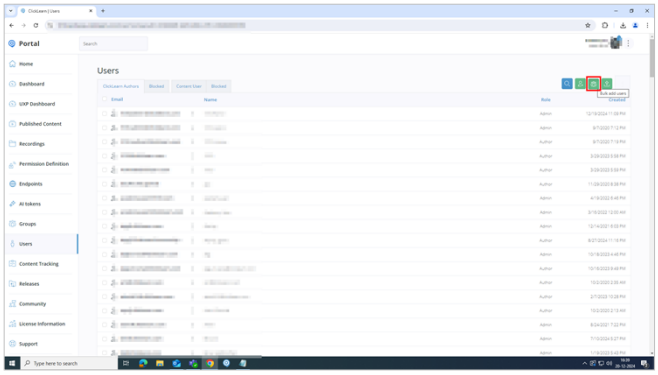


Click on the button **Save.**



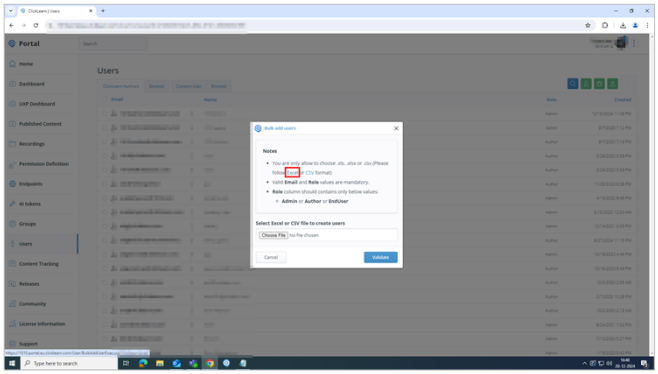
26.1.1.3. Add Bulk Users

Click on the button **Bulk add users.**

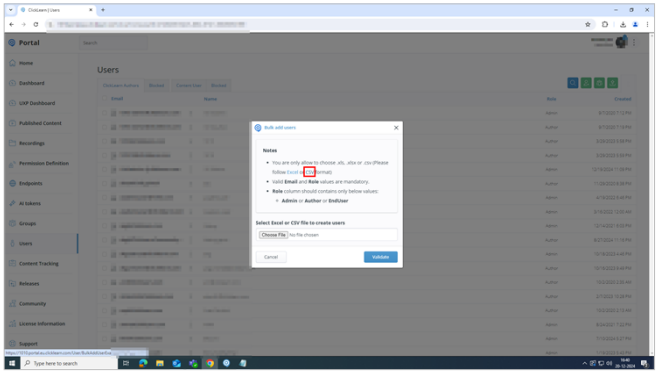


26.1.1.4. Upload Excel or CSV File

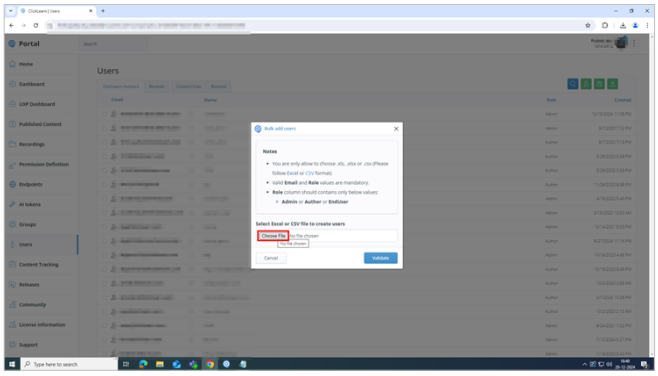
Click on the button **Excel.**



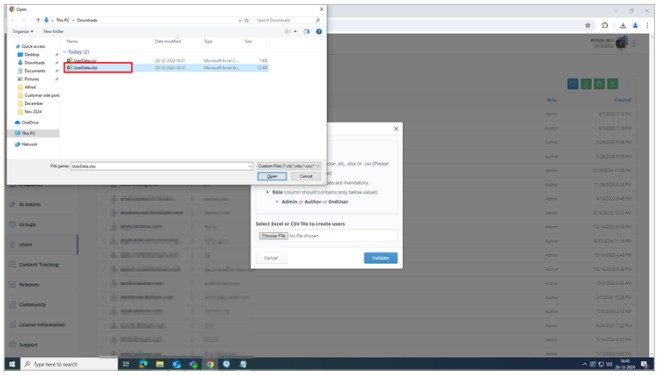
Click on the button **CSV.**



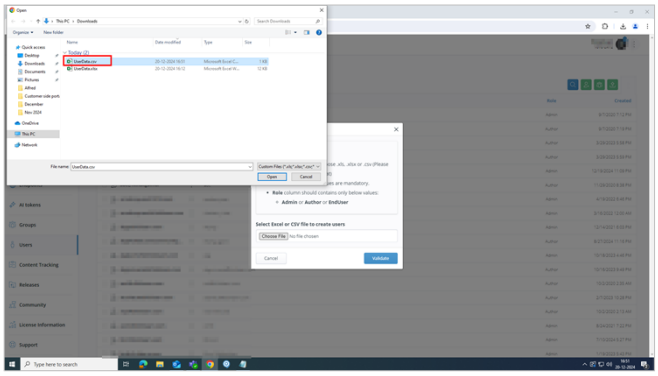
Click on **Choose File** to select Excel or CSV file.



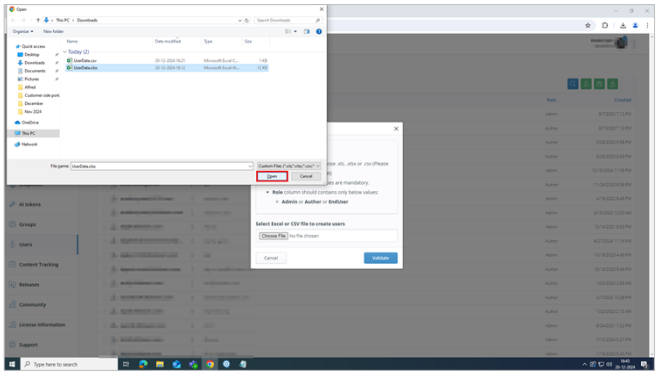
Click on the downloaded **Excel file** to upload it.



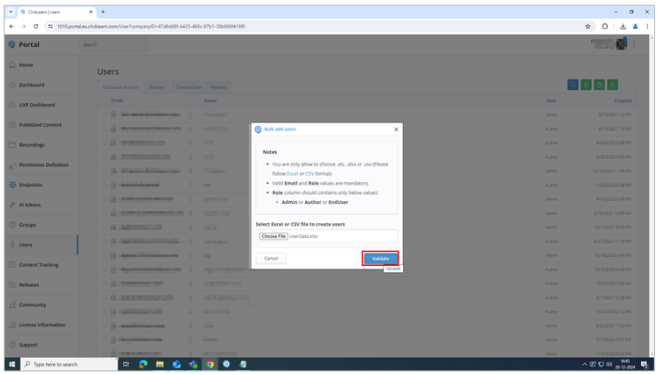
Click on the downloaded **CSV file** to upload it.



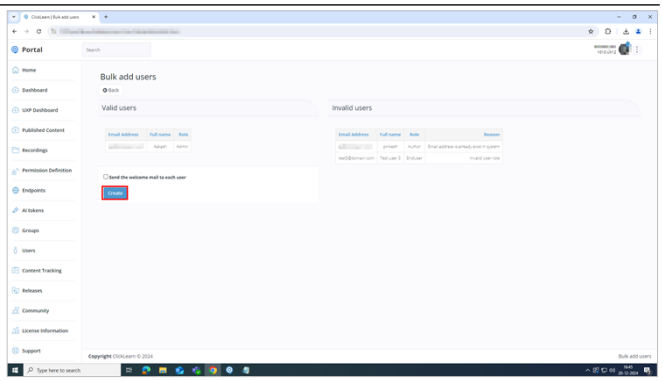
Click on **Open** to upload an Excel or CSV file.



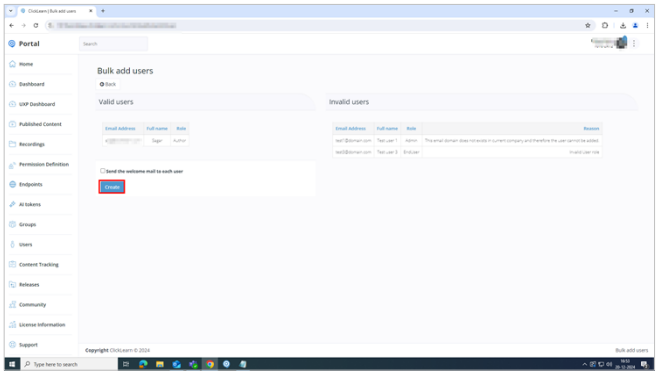
To validate your Excel or CSV file, click the **Validate** button.



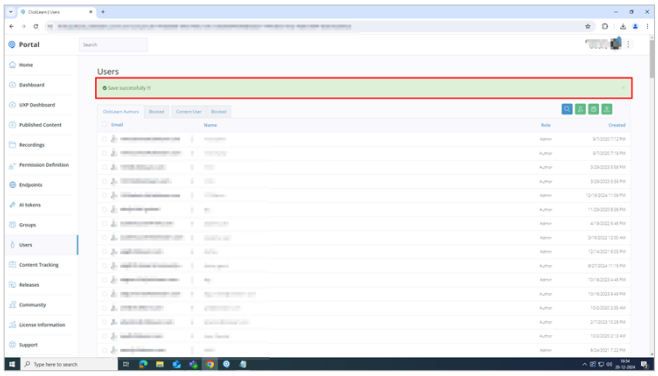
Once you validate the Excel file, you can see added users. You can also send a welcome mail to the added user. Click on **Create** to add a user.



Once you validate the CSV file, you can see added users. You can also send a welcome mail to the added user. Click on **Create** to add a user.

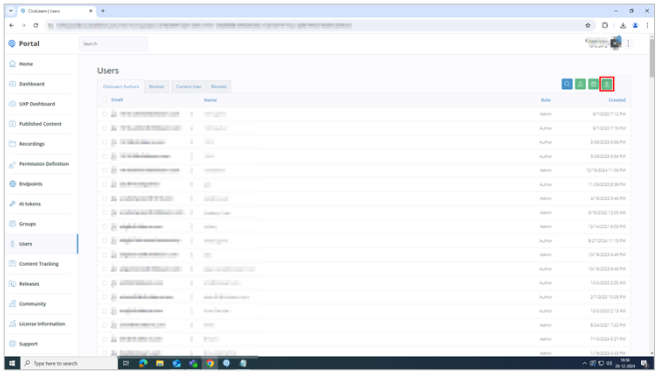


After uploading an Excel or CSV file and adding users, you will see all the created bulk users along with the message **Save Successfully**.

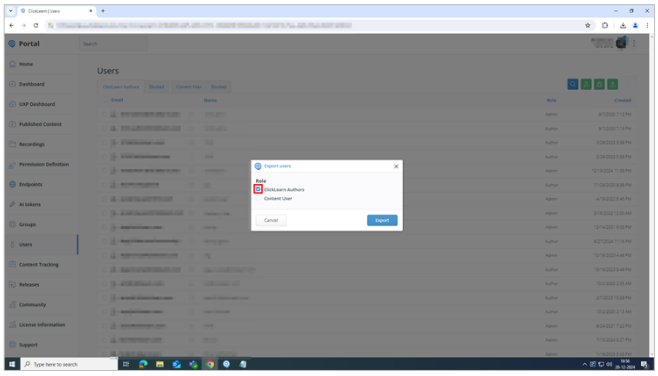


26.1.1.5. Export Users

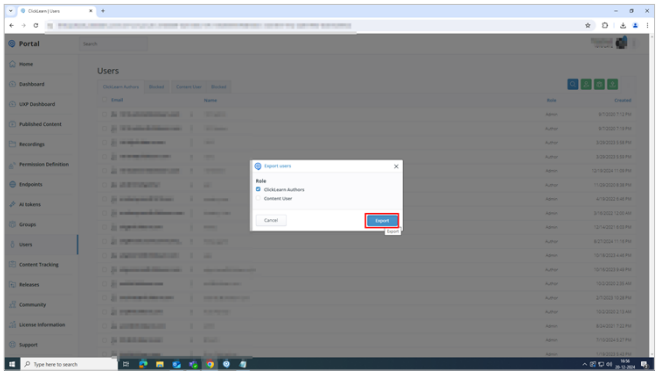
Click on the button **Export users.**



Click on **ClickLearn Authors.**

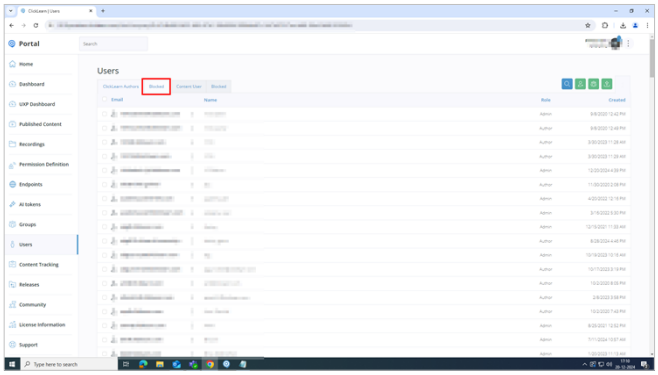


Click on the button **Export.**

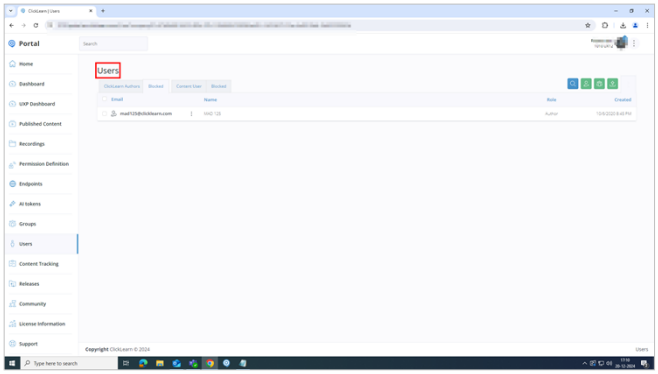


26.1.1.6. Blocked Users

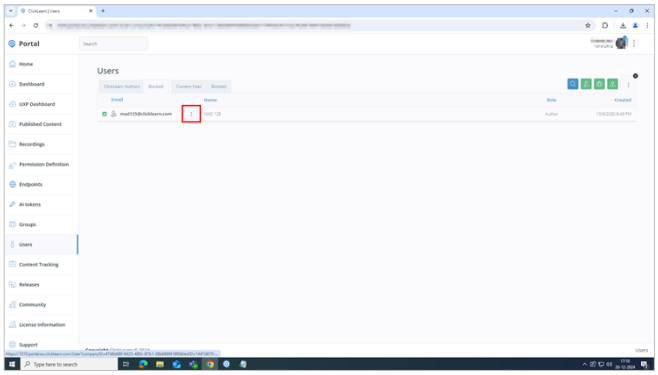
Click on the button **Blocked.**



Click on **Users.**
You can view all the users who have been blocked for **ClickLearn Author** here.

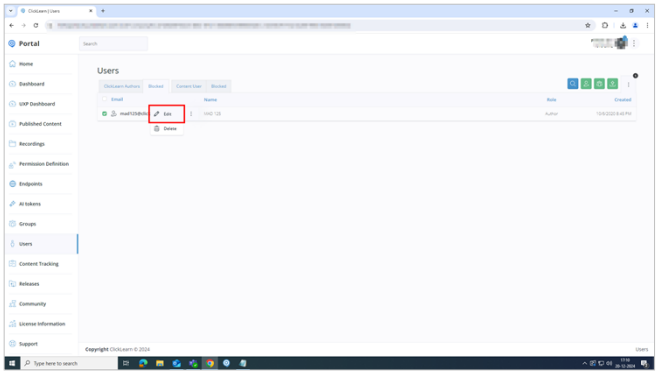


Click on the button **open menu.**

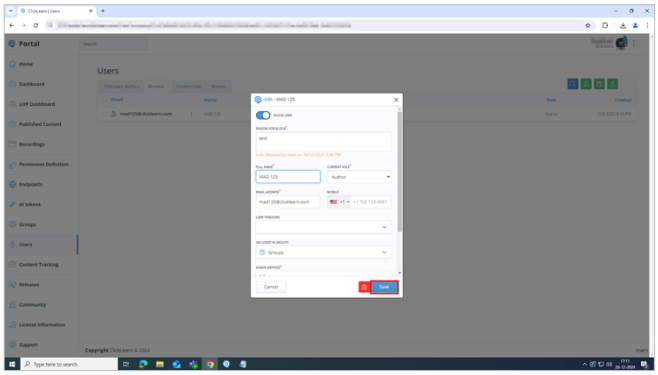


26.1.1.7. Edit

Click on the button **Edit.**

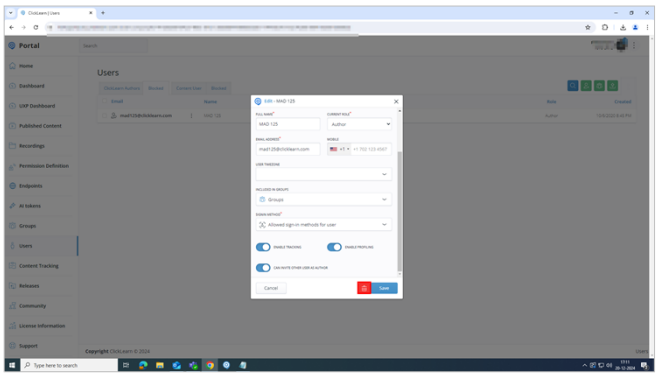


Once you click on Edit, you can change the details of the user, such as the reason for the block, full name, current role, email, mobile, user time zone, groups, and signing method. You can also enable/disable tracking and invite another user to be the author. Click on **Save**.



26.1.2. Delete

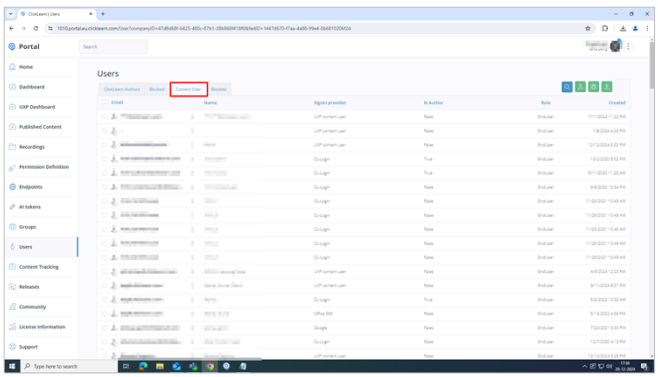
Click on **Delete** to remove the blocked user.



26.1.3. Content User

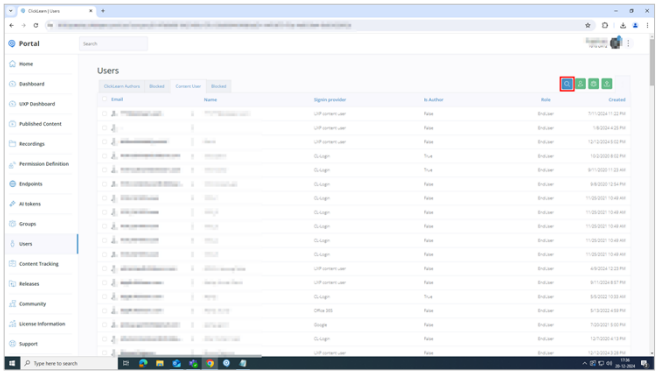
Click on **Content User**.

The Content User display list includes the user's name, email, sign-in provider, author status, role, and creation date. This information is essential for tracking and managing user activity on the platform.



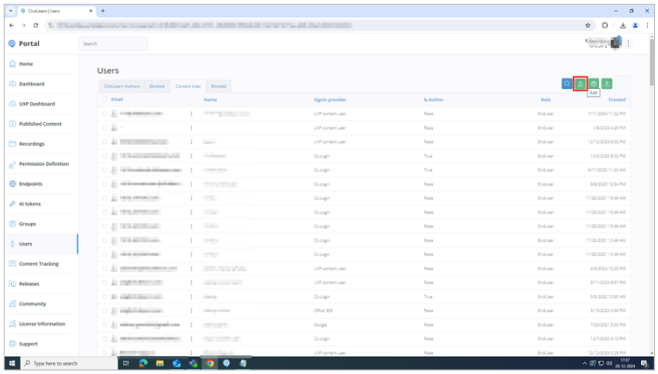
26.1.3.1. Search

Search: To search content users and check which role they're assigned to.

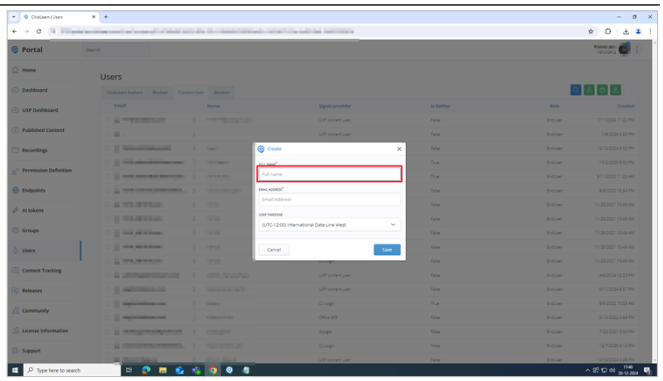


26.1.3.2. Add User

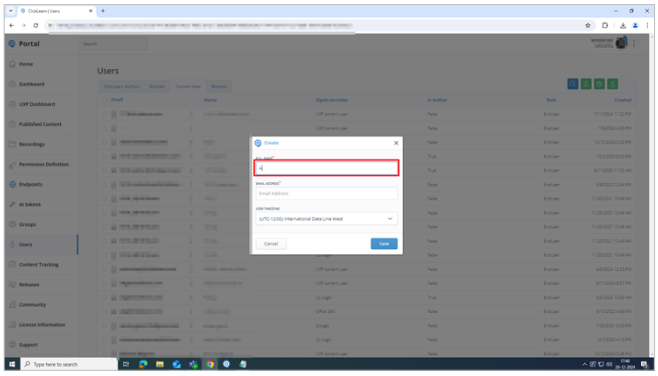
Click on the button **Add.**



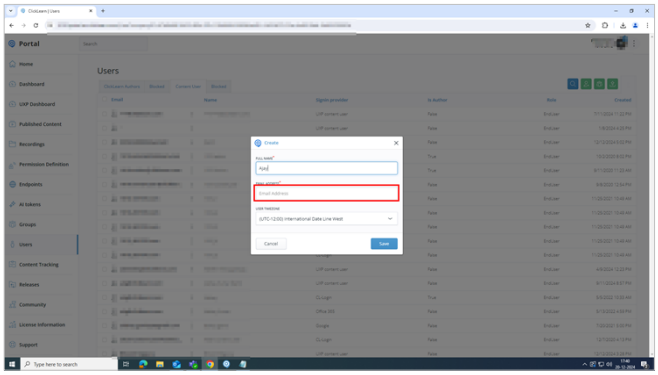
Click on the input field **Full name.**



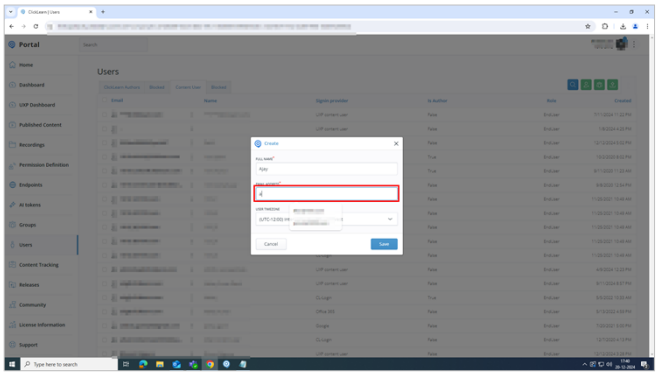
Enter **Full name**.



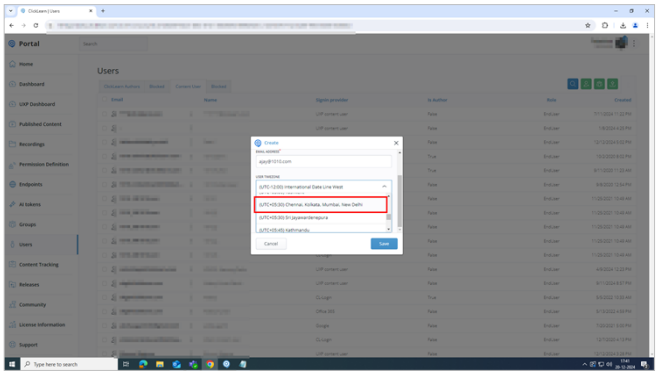
Click on the input field **Email Address.**



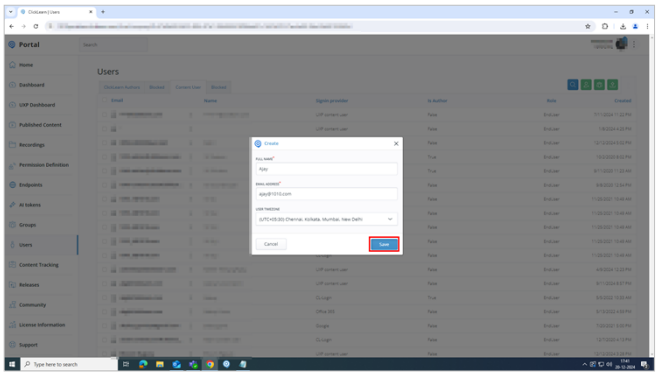
Enter **Email Address**.



Click on the user timezone from the dropdown menu.

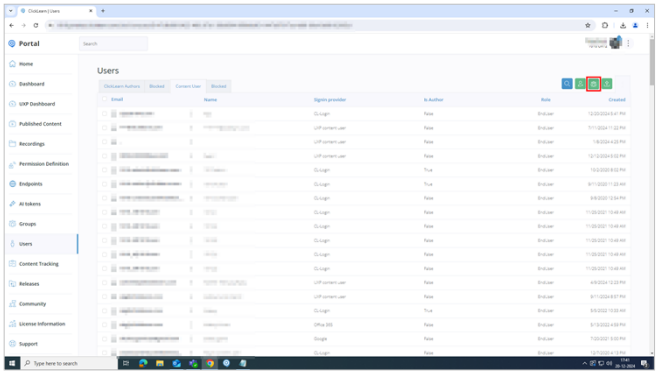


Click on the button **Save.**



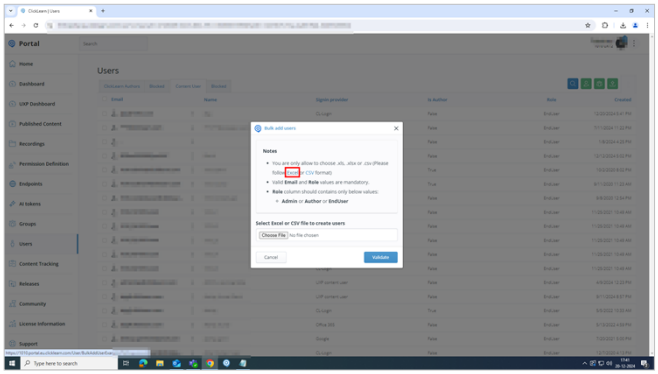
26.1.3.3. Add Bulk Users

Click on the buttton **Bulk add users.**

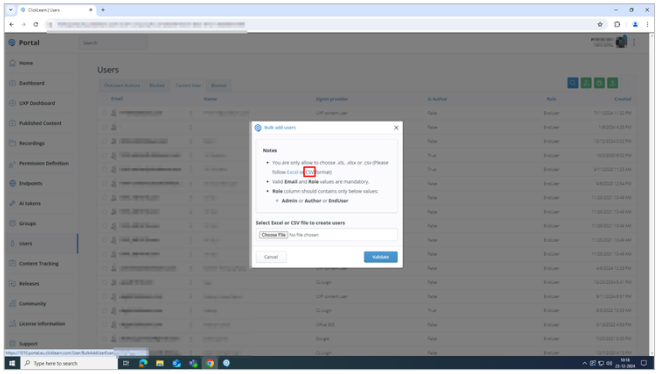


26.1.3.4. Upload Excel or CSV File

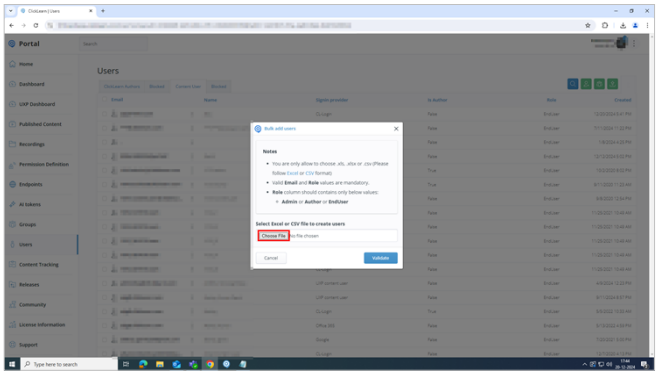
Click on the button **Excel.**



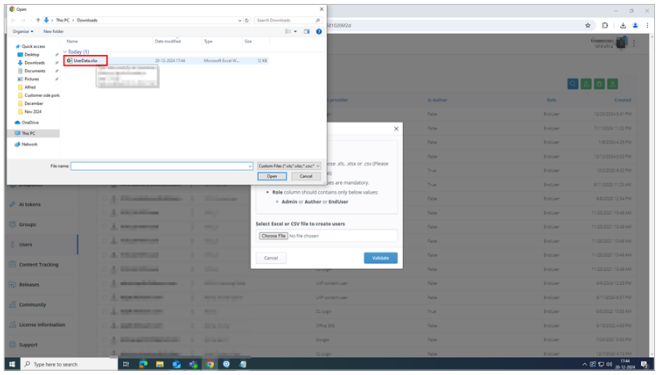
Click on the button **CSV.**



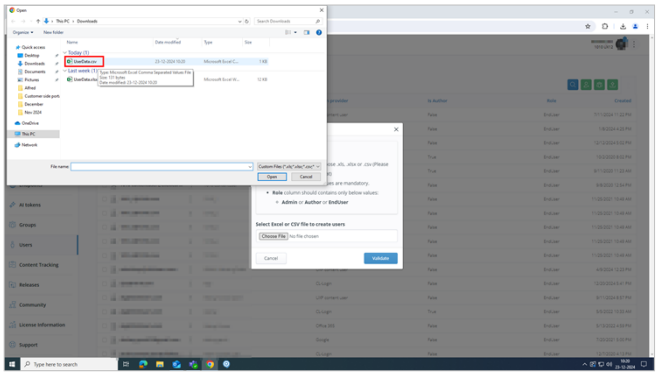
Click on **Choose File** to select Excel or CSV file.



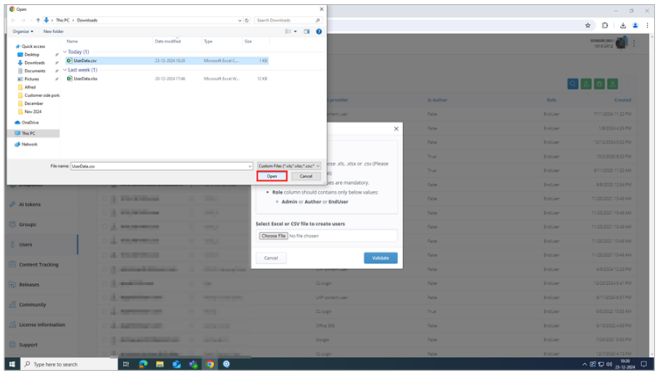
Click on the downloaded **Excel file** to upload it.



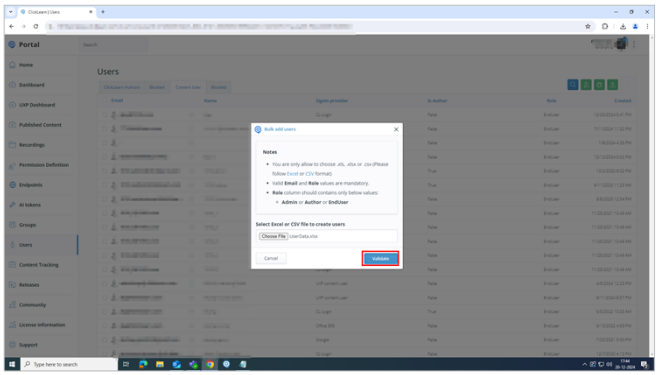
Click on the downloaded **CSV file** to upload it.



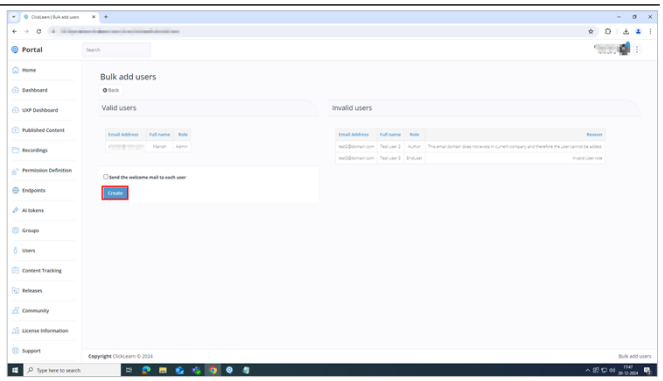
Click on **Open** to upload an Excel or CSV file.



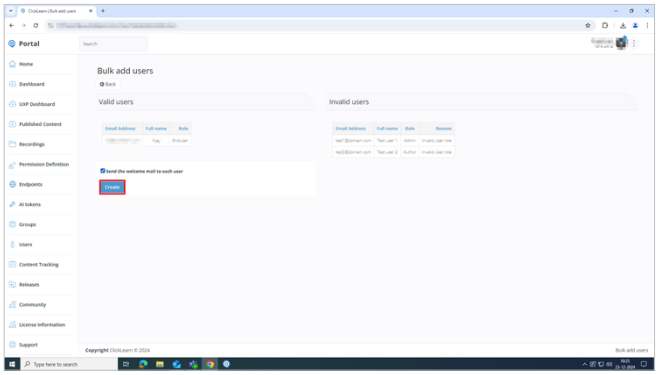
To validate your Excel or CSV file, click the **Validate** button.



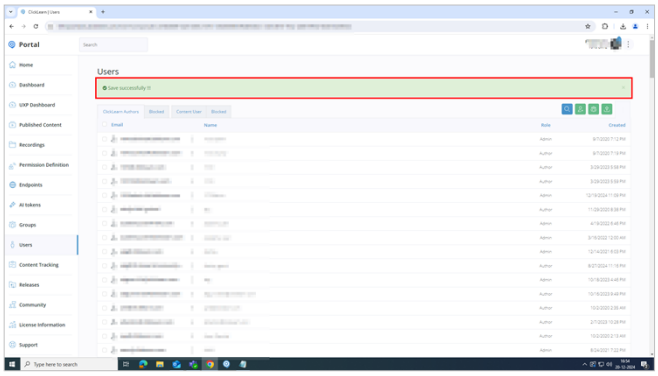
Once you validate the Excel file, you can see added users. You can also send a welcome mail to the added content user. Click on **Create** to add a content user.



Once you validate the CSV file, you can see added users. You can also send a welcome mail to the added user. Click on **Create** to add a content user.

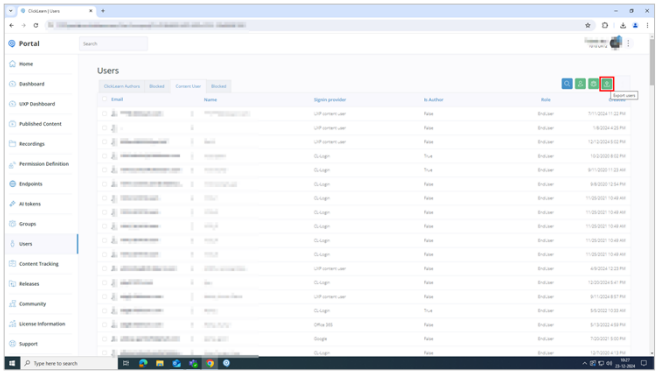


After uploading an Excel or CSV file and adding users, you will see all the created bulk users along with the message **Save Successfully**.

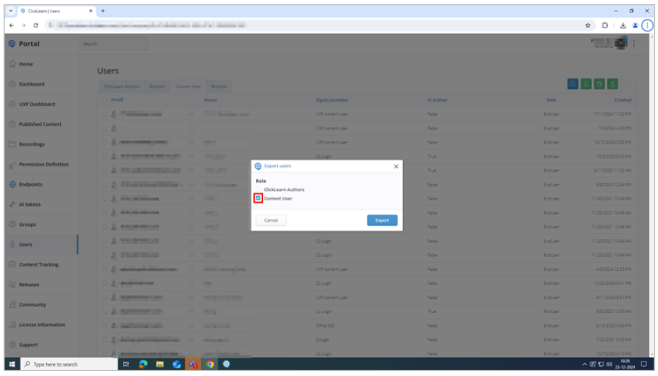


26.1.3.5. Export Users

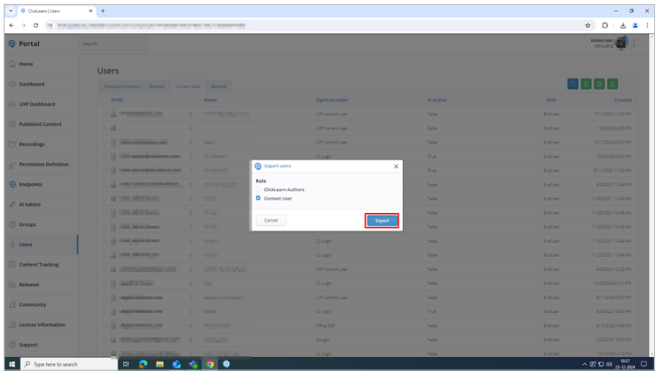
Click on the button **Export users.**



Click on **Content User.**

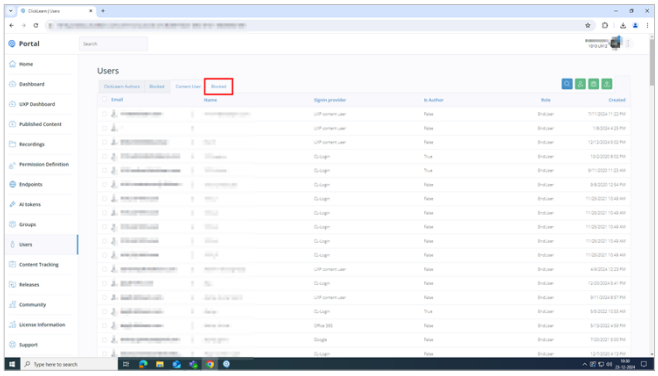


Click on the button **Export.**

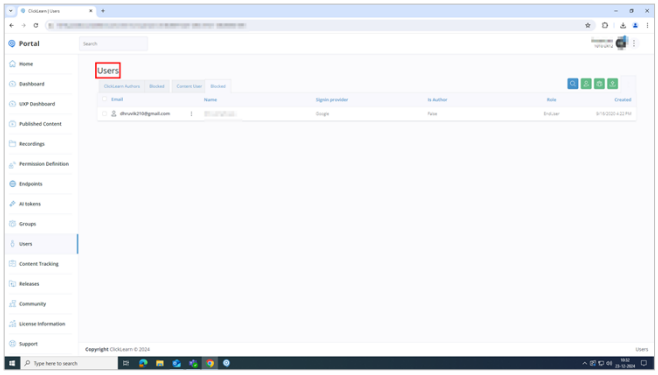


26.1.3.6. Blocked Users

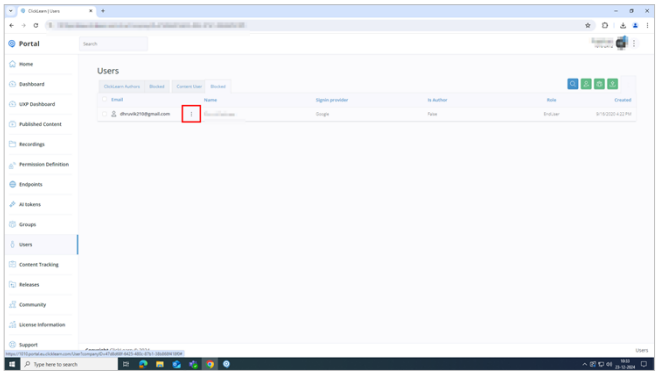
Click on the button **Blocked.**



Click on **Users.**
You can view all the users who have been blocked for **Content Users** here.

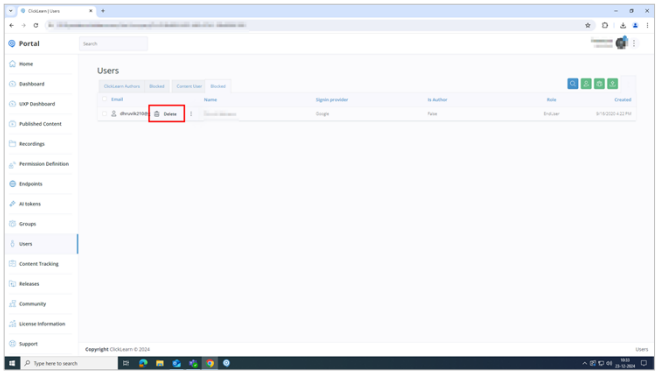


Click on the button **open menu.**



26.1.3.7. Delete

Click on **Delete** to remove the blocked content user.



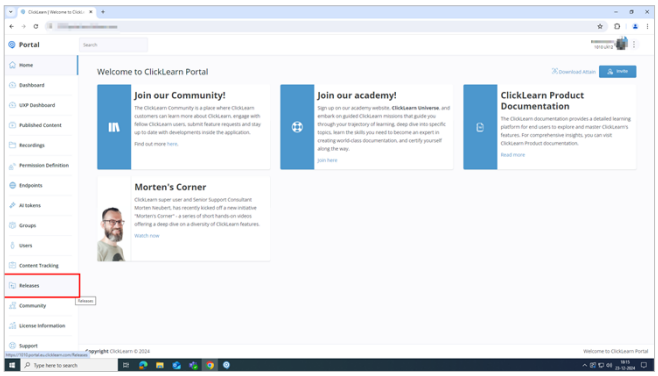
27. Download Studio Releases

Access the latest ClickLearn Attain MSI installer from the portal, so managed deployments can be updated to a specific version without searching external sources.

27.1.Introduction

The Release section in ClickLearn provides detailed information about the latest updates, features, and enhancements introduced in each version. It covers improvements across tools like **Assist MSI**, **ClickLearn Console**, and **Attain MSI**, helping users stay informed about new functionalities and optimize their use of ClickLearn.

Click on the button **Releases.**

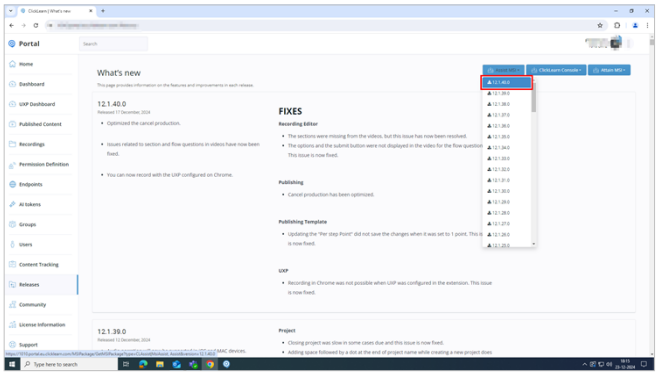


27.1.1. Download MSI

Click the **Assist MSI** button.

Select the version for which you wish to download the MSI. In this case the latest version of attain is **12.1.40.0**

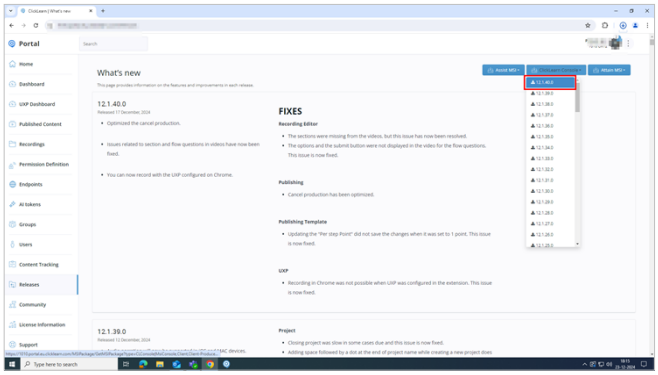
Assist MSI: A tool designed to enhance user productivity by delivering on-screen guidance and support, helping users navigate and complete tasks seamlessly.



Click on **ClickLearn Console** button.

Select the version for which you wish to download the MSI. In this case the latest version of attain is **12.1.40.0**

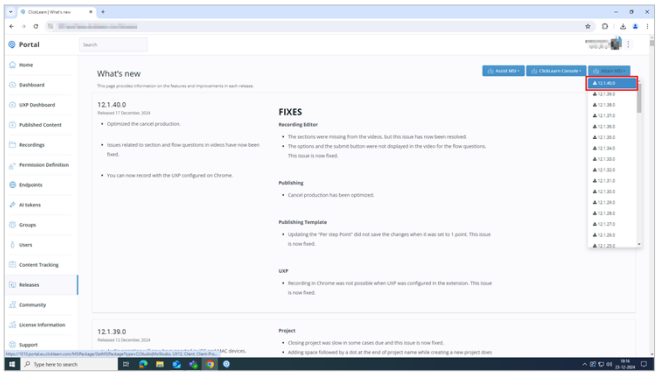
ClickLearn Console: The central hub for managing and creating content, allowing users to record, edit, and publish learning materials with ease and efficiency.



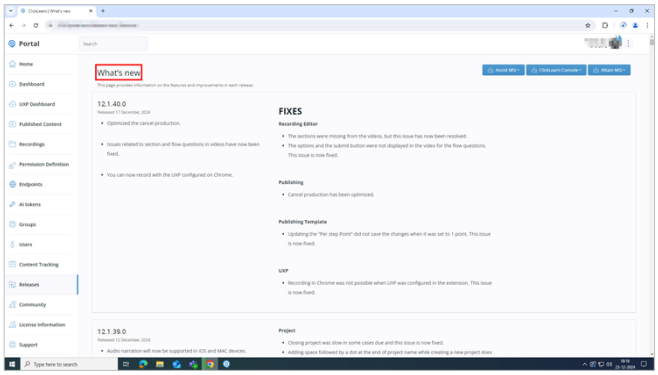
Click on **Attain MSI** button.

Select the version for which you wish to download the MSI. In this case the latest version of attain is **12.1.40.0**

Attain MSI: A platform that ensures users receive interactive and engaging training experiences, making learning more effective and accessible.



What's new: This page includes information about the latest features and improvements of each release.



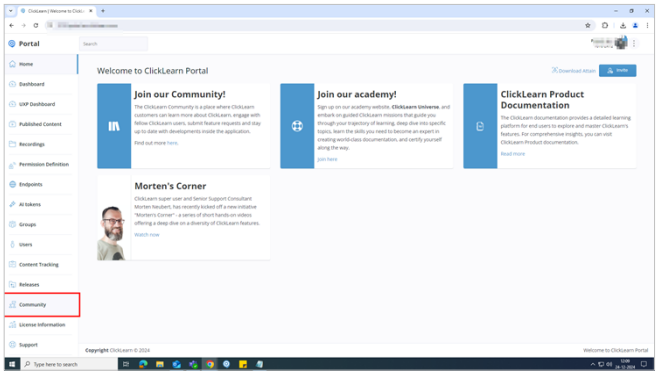
28. Community

Connect with other ClickLearn users, find answers to questions, and contribute to shared knowledge, reducing reliance on support tickets for common queries.

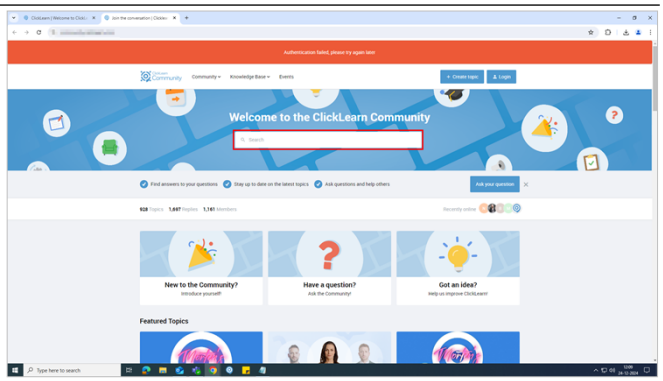
28.1.Introduction

ClickLearn Community is a resource library where you stay updated on the latest topics, find answers to your questions, ask questions, and help others. You can also chat with other users, share your opinion, and engage the community in a discussion.

Click on the button **Community.**



Click on the input field **Search.**



Why not join our growing online community? ClickLearn Community is a great place for customers to learn more about the solution, ask questions, or share experiences and use cases with fellow ClickLearn users. You can also submit feature requests and stay up-to-date with the latest developments in ClickLearn.

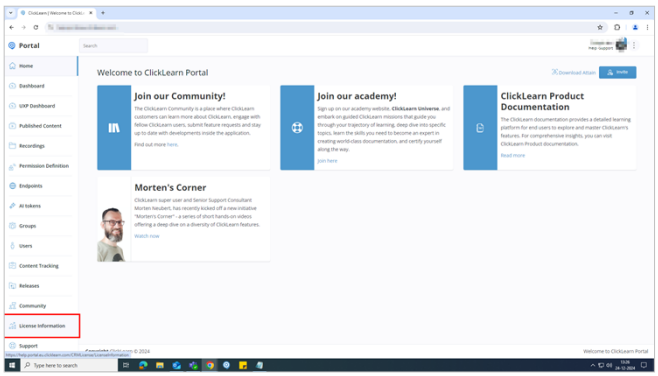
To join, please visit: https://community.clicklearn.com/

29. License Information

View your organisation's ClickLearn license details, including seat counts, expiry, and what features are included in your subscription.

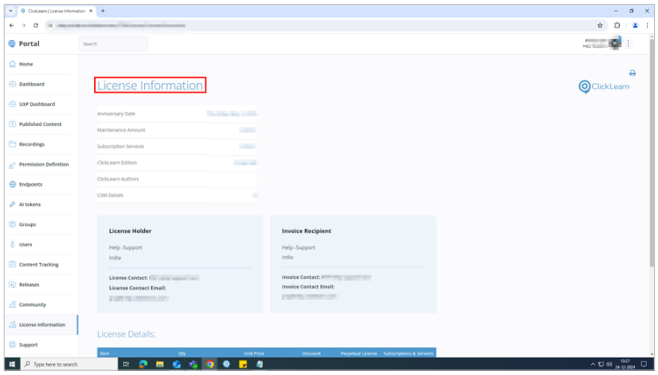
29.1.License Information

Click on the button **License Information.**

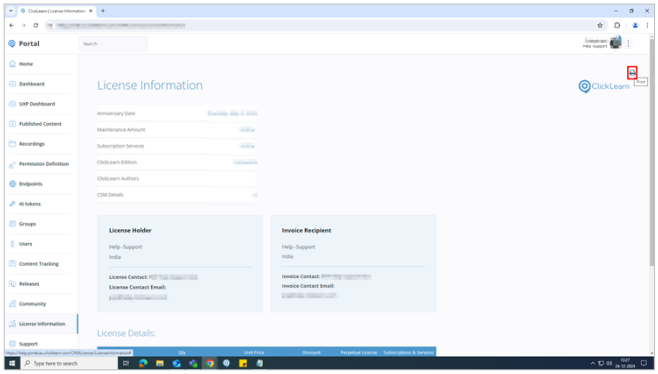


Once you click on License information, you can see details of your license, such as the **anniversary date**, **maintenance amount**, **subscription services**, **ClickLearn edition** (which type of license is—corporate here), **ClickLearn Authors** (how many ClickLearn Authors are), and **CSM** (the name and email ID of the CSM).

Also, you can see the license holder and invoice recipient with contact email. In License details, you can see items (features you've subscribed to), quantity, unit price, discount, perpetual license, and subscriptions & services.



Click on the button **Print** to download and print the license.

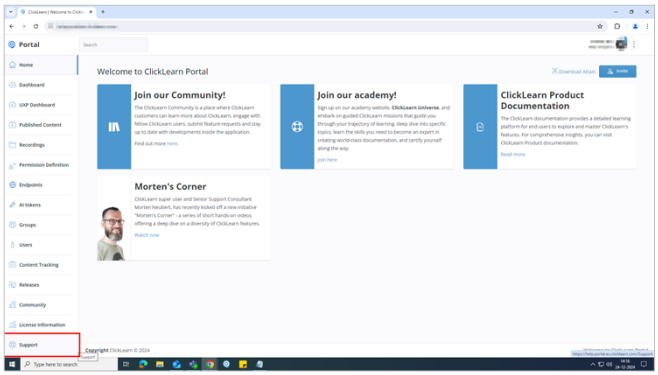


30. Contact Support

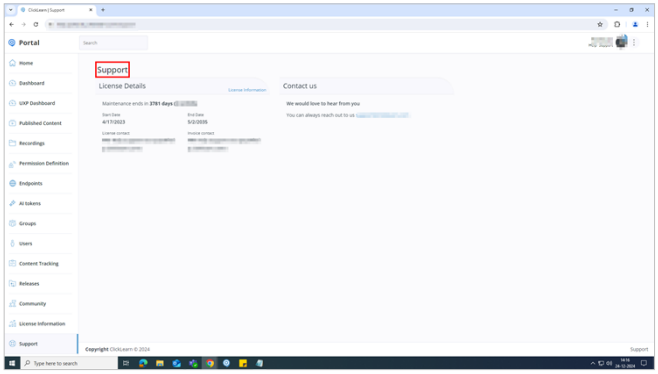
Reach the ClickLearn support team directly, for issues that cannot be resolved through documentation or community resources.

30.1.Support

Click on the button **Support.**



Support provides guidance on license details, including maintenance dates, start and end dates, license and invoice contact emails, as well as the support team's contact information.



31. Folder permissions in portal

Control which authors can access recordings within specific folders, so content ownership and editing rights are enforced at the folder level.

31.1.Introduction

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

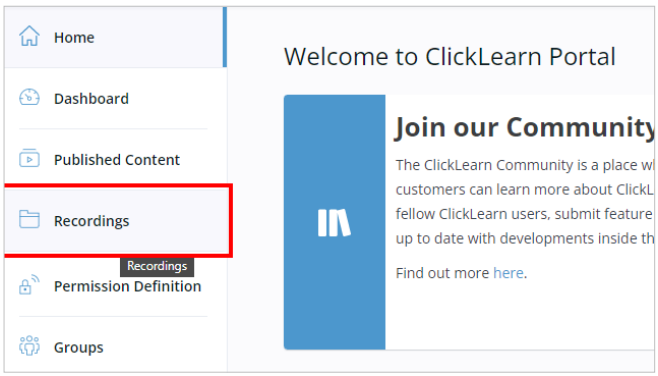
Reader : Only read the folder and files.

Please note that the permissions set will be overwritten by the root folder permission if it has less access.

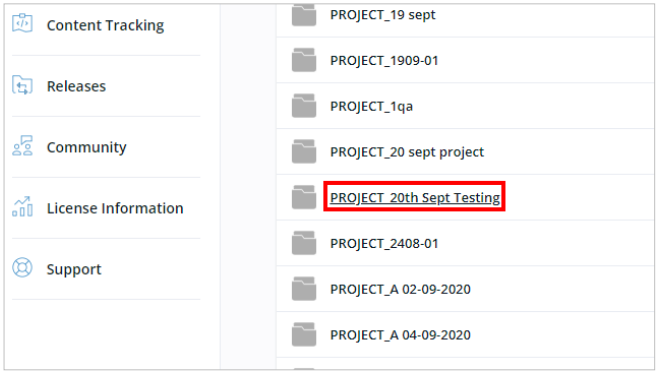
For example:
-A user having Author access[Add + Edit + Delete + Read
] on Assets folder and no delete access on its sub folder, user still can delete the sub folder and its contents, as it inherits the parent folder access.

31.2.Eg. How to assign permissions on recordings folder

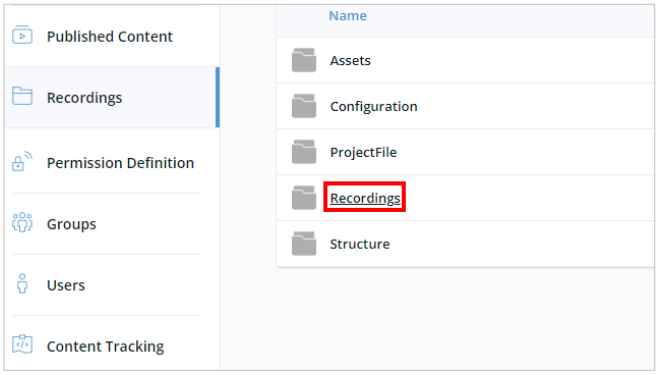
Click on the link **Recordings**



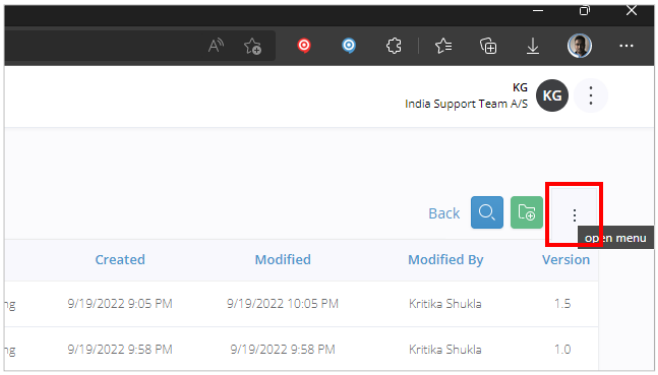
Click on the link **PROJECT_20th Sept Testing**



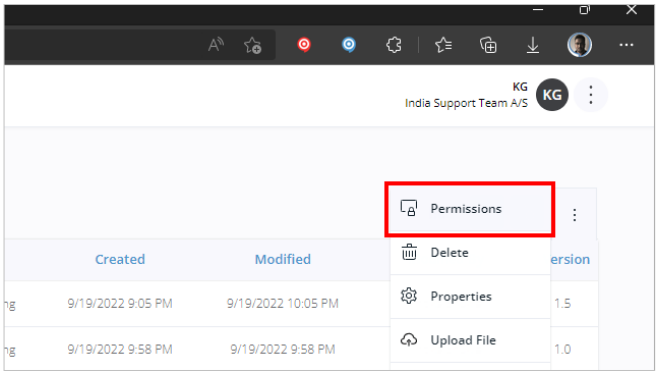
Click on the link **Recordings**



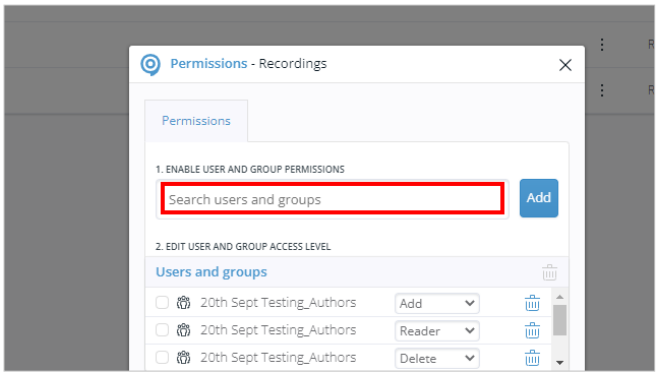
Click on the link **open menu**



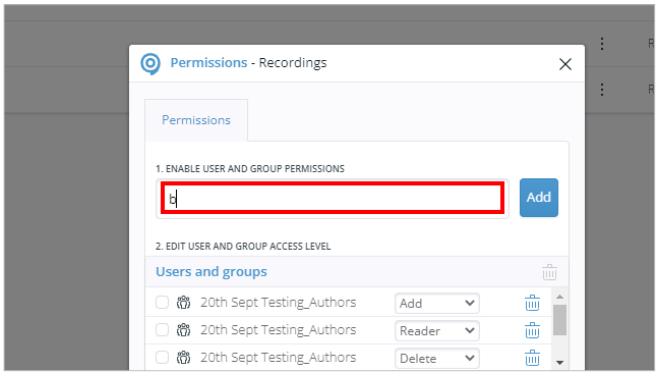
Click on the link **Permissions**



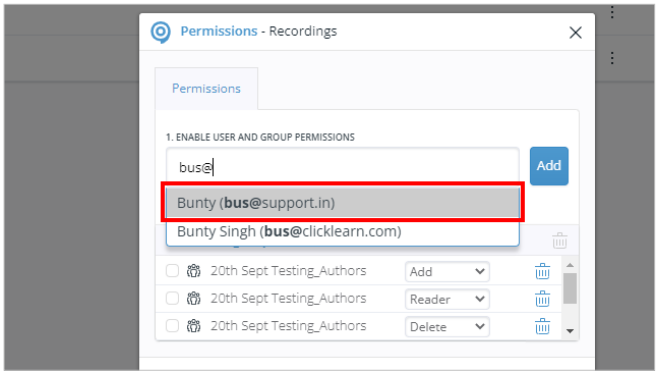
Click on the input field **Search users and groups**



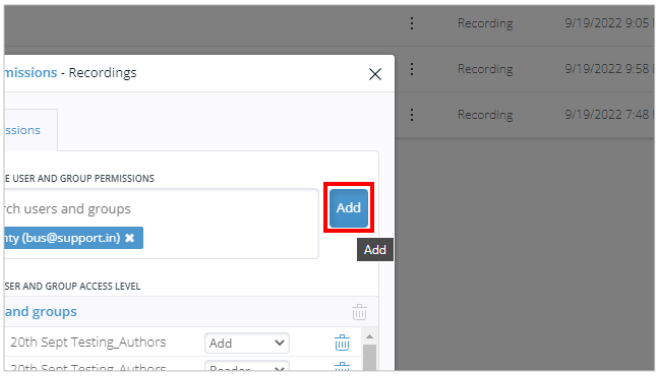
Enter **Search users and groups**.



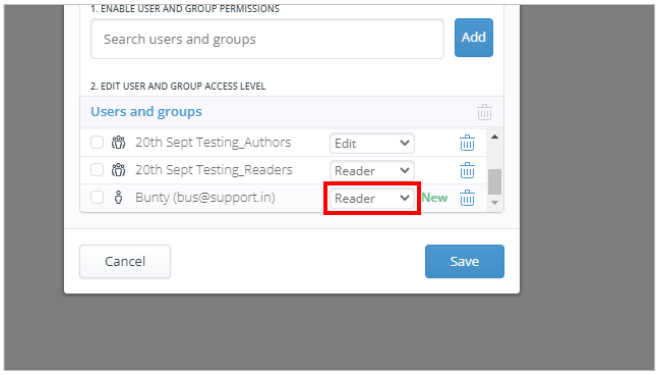
Click on the item **Bunty (bus@ support.in)** in the list



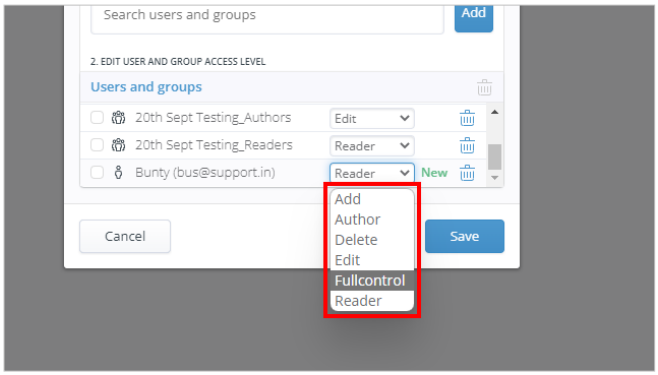
Click on the link **Add**



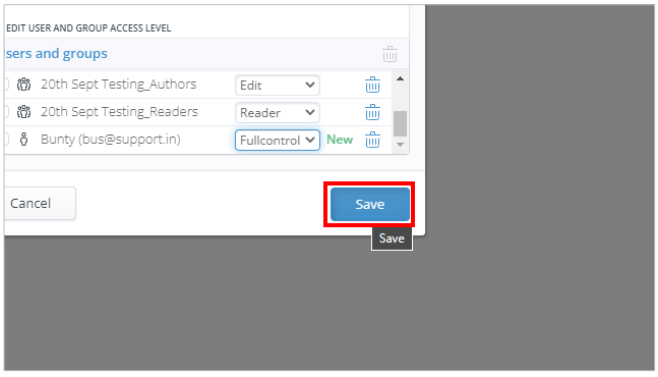
Click on the combo box



Click on an option from the list



Click on the link **Save**



32. Generic Web Connector

32.1. Generic web connectors

Record processes in web applications that don't have a dedicated ClickLearn connector - extending ClickLearn's coverage to any browser-based system.

32.1.1. 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.

32.1.2. 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>
```

32.1.3. Generic Web Page Replay Issues

To illustrate how changes will affect the replay, please have a look at the changed html document.

```
<html>
    <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.

32.1.4. 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>
    <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>
```

32.1.5. 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.

32.1.6. 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.

32.1.7. 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.

32.1.8. 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>
    <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>
```

32.1.9. 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.

32.1.10. 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.

32.1.11. 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.

32.1.12. Modified Replay Still Ok

Even though the html document is changed the replay works correctly.

32.1.13. 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.

32.1.14. 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>
    <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.

33. ClickLearn Authoring Tools

Extend ClickLearn with the Authoring Tools add-in, enabling additional recording and editing capabilities for specific application types.

33.1.Introduction

ClickLearn Authoring Tools is used by ClickLearn Studio to let you capture your screen actions, record documents, and track elements within a screen. This makes it easy to record, replay annd assist process within the browser.

Note: With ClickLearn Authoring Tools, you can also record directly in Outlook Online, making it possible to capture email and calendar-based processes without any additional setup.

33.1.1. How to Install ClickLearn Authoring Tools Extenstion

To use ClickLearn Studio and record from any web-based application, you have to install an extension. Here are the steps to Install the ClickLearn Authoring extension.

Download : You can download ClickLearn Authoring Tools extension from the web store.

Chrome: https://chromewebstore.google.com/detail/clicklearn-authoring-tool/nicmgkdfjeohcjkeeafghpafmkhpomdo?hl=en-GB&utm_source=ext_sidebar

Edge : https://microsoftedge.microsoft.com/addons/detail/clicklearn-authoring-tool/hpjglmmmlghioncgkbfnajmmibgdmolh?hl=en-GB

33.1.2. How to Configure ClickLearn Authoring Tools

- Remove the existing clicklearn connector extensions in both the browsers.[You should delete them and not disable].
- Install the authoring tools extensions from the webstore.

Add a file with the name ClickLearnConfig.json in the path 'C:/ProgramData/ClickLearn and paste the below text into it.

JSON{
"webSocket":false,
"webSocketPort": 8768

- }

Once you paste the text below and click on the extension, you will see the message ClickLearn Authoring Tools is connected.

Note: Port 8768 must be active; otherwise, you have to use another one.

Important: *Make sure the file is saved as ClickLearnConfig.json and not as ClickLearnConfig.json.txt.*

By default, Notepad saves files as text (.txt) files, and Windows hides known file extensions. The file may look like it's named ClickLearnConfig.json, but its real name is ClickLearnConfig.json.txt. If the file stays a .txt file, ClickLearn can't read it, and the Authoring Tools won't connect.

To check the file name and fix it:

1. Open File Explorer and go to C:\ProgramData\ClickLearn.
2. Turn on file name extensions:
- Windows 11: Select View > Show > File name extensions.
- Windows 10: Open the View tab and select the File name extensions check box.
3. Look at the full file name. If it ends with .txt, right-click the file, select Rename, and delete .txt at the end so the name is exactly ClickLearnConfig.json.
4. When Windows asks if you're sure you want to change the file name extension, select Yes.

Tip: You can skip the renaming step by saving the file correctly from Notepad.

In the Save As window, set Save as type to All files (*.*), then enter ClickLearnConfig.json as the file name.

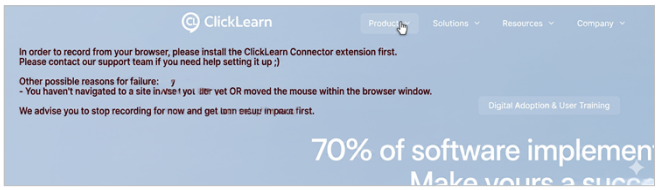
34. Troubleshooting

34.1.Connector Extension Issue

Get back to recording without reinstalling the connector by restarting the browser and Studio, then giving the connector code a moment to download, is usually enough to restore element-level capture (the green rectangle) when it stops appearing.

34.1.1. Introduction

When trying to record and if you face the issue like in the screenshot, please follow the mentioned steps.



34.1.2. Steps

Check if you have installed the extension and has the browser settings mentioned in this guide.

If its installed, then follow the below steps:

- Close all the browsers that are open.
- Close the ClickLearn Studio.
- Open the studio and log in.
- Now open the browser in which you need to record and navigate to the link.
- Start the recording.
- Hover on any button and wait for approx. 30s to 40s, which allows time to download the connector code.

34.1.3. Impact

You should see the green rectangle on the controls and icon of the supported application that is been recorded on top right corner of the rectangle.

35. ClickLearn Console

Automate ClickLearn operations from the command line, so that producing and publishing content can be integrated into existing CI/CD or scheduled automation pipelines.

35.1.Introduction

The ClickLearn Console application allows users to interact directly with the ClickLearn Studio client using a command-line interface.

This tool empowers users to manage ClickLearn projects and execute various commands directly from the Windows Command Prompt, PowerShell, or similar command-line environments. It is designed to help teams automate processes, perform scripted operations, and seamlessly integrate ClickLearn functionalities into their workflows.

The application offers two modes of operation: an interactive mode for issuing commands one at a time, or a batch mode for automating sequences of actions from a file. All communication, including input and output, is handled using the **UTF8 format** to support a wide range of characters.

35.1.1. Installation

To begin using the ClickLearn Console application, you must first install it on your Windows machine.

Installation Steps:

1. Download the MSI installation package from the ClickLearn Portal.
2. Follow the standard Windows installation process to complete the installation.

Once installed, you can launch the application from your preferred command-line environment.

35.1.2. Supported Commands

The ClickLearn Console supports a variety of commands to manage projects, run tests, and interact with applications. Each command has specific parameters and expected behaviors.

This section provides an overview and usage details for each supported command in the application.

- **help** - Help for all commands
- **quit** - Quit application
- **lcid** - Set current language

list -
Parameters =[select] [project|recording|test] [%name]

- *Description* = List files and optionally select files
- **edit** - Edit selected file

close
Parameters = [save|discard]

- *Description* = Close edit of selected file

apt.run
Parameters = testname expectedresult [true]

- *Description* = Run APT test, specify true if it should run even if a previous apt.run failed

apt.savelog
Parameters = destinationfilename

- *Description* = Save APT log file

apt.share
Parameters = destinationfilename

- *Description* =Download the APT log package as a ZIP file.

apt.exitonerror
Parameters = [true|false]

- *Description* = Exit console if apt.run failed and running from batchfile. If apt.run is followed by apt.savelog the log will be saved before exit.

ifs.restart
Parameters = url username password [true]

- *Description* = Restart IFS Applications, if true then use iexplore.exe to start the clickonce
- **ifs.exit =** Exit IFS Applications

web.restart
Parameters = url [true] [true]

- *Description* = Restart Web application, if first argument is true then use edge instead of chrome. If second argument is true, run the browser in incognito mode.

web.exit
Parameters = [true]

- *Description* = Exit Web browser, if true then use edge instead of chrome

security.encrypt
Parameters = *value*

- *Description* = Encrypt value. Please use this for batchfiles! The first line in the batchfile will be decrypted before login to ClickLearn. This also applies to any password used for commands like ifs.restart etc.

Note:
Each command may be followed by one or more parameters. All parameters are separated by a space. If any

of the individual parameters contains spaces, you may specify the parameter in double quotes.
Any parameter shown in the command table in square brackets are optional. For example, the close command may be given as

- **close**
- **close save**
- **close discard**

Batch file - When using a batch file the first line MUST contain the encrypted string from executing the command

- security.encrypt cname|username|password

35.1.3. Sample batchfile content

VebhQuyk0oAgHbyY9znl5chtFrjrCW4kNPzWC8l9TEqluhazS8F4Xmuy6BkV9OJZ

```
// This is a sample ClickLearnConsole batch file
// Set language to English
lcid 1033

// Select the desired APT project
list select project "%apt test project"

// Open the selected project
edit

// Restart IFS Applications
ifs.restart https://xxx/client/runtime/Ifs.Fnd.Explorer.application ifsapp xxx

// Execute an APT test; expect result true (no errors)
apt.run "crm test 4" true

// Save the log file locally
apt.savelog "c:\temp\clconsole1.aptlog.xml"

// Execute another test; expect result false (errors expected), force execution regardless of previous result
apt.run "crm test 5" false true

// Save another log file
apt.savelog "c:\temp\clconsole2.aptlog.xml"

// Close the opened project
close

// Exit IFS Applications
ifs.exit

// Quit the console application
quit
```

35.1.3.1. Exit codes

Exit codes help you determine the result of the ClickLearn Console's operation and are particularly useful when automating tasks or integrating with other tools.

This section describes the exit codes you can expect from the application and what each one means.

Exit code = -1
Description = Login failed

Exit code = -2
Description = Cannot find testfile

Exit code = -3

Description = Execution not as expected

35.1.4. Sample run from command line and console output to log file

You can execute the ClickLearn Console application from the command line and redirect output to a log file as shown below:

"C:\Program Files (x86)\ClickLearn\ClickLearn Console\ClickLearnConsole.exe" "c:\temp\clconsole.txt" > c:\temp\clconsole.log

This will execute the commands defined in the specified batch file and save the output to the given log file.

36. JAVA specific

36.1.JAVA requirements

Confirm your environment meets the JAVA Access Bridge prerequisites before you start configuring it, so setup doesn't stall midway on a missing JRE version or dependency.

36.1.1. Introduction

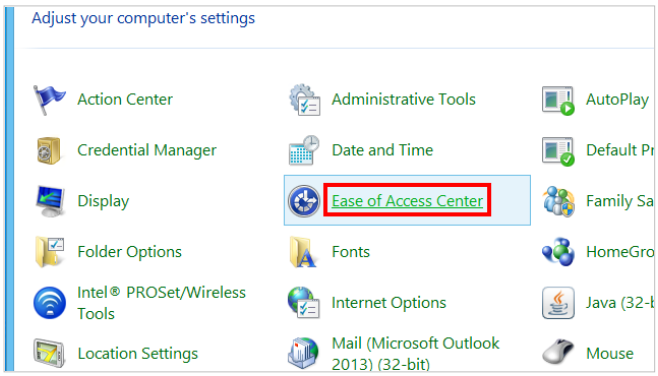
This guide outlines how to activate the Java Access Bridge on your Windows system. This feature serves as a critical connector between Java-based applications and the Windows operating system's accessibility infrastructure.

Why you should do this?
If you rely on assistive technologies such as screen readers, magnifiers, or voice recognition software, you should enable this feature.
By default, many Java applications cannot communicate with Windows accessibility tools. Activating the bridge ensures that your assistive software can "read" and interact with Java programs, preventing them from appearing as inaccessible blank windows.

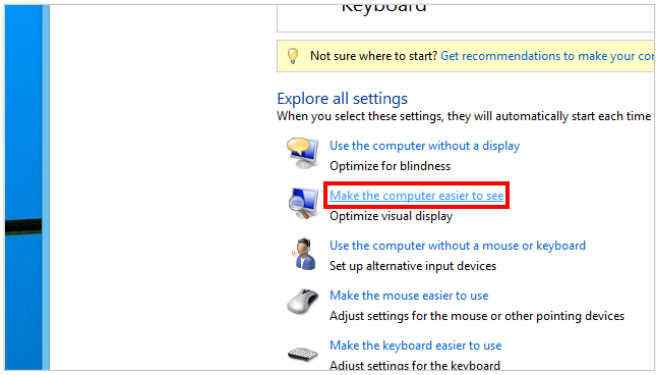
36.1.2. How to Enable the Java Access Bridge

Follow these steps to configure the setting via the Control Panel:

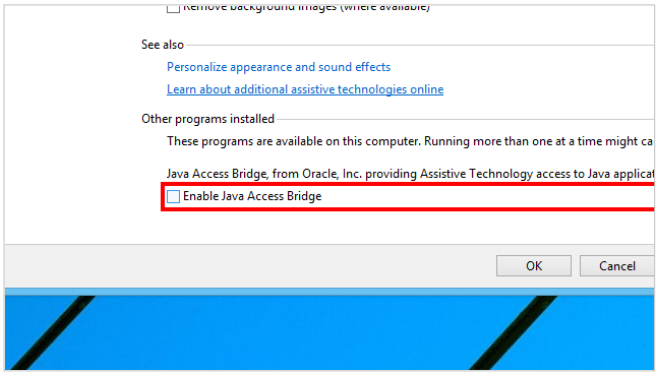
Click on the link **Ease of Access Center.**



Click on the link **Make the computer easier to see**.

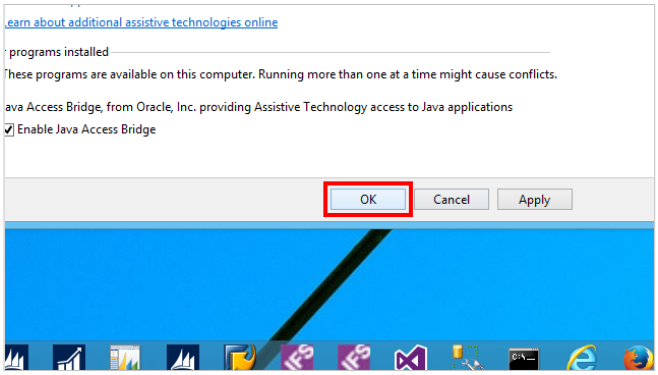


Click on the checkbox **Enable Java Access Bridge**.



Click on the button **OK**.

You may also press **ALT+O**.



36.2.Java Access Bridge: Requirements and Verification

Enable ClickLearn to record individual elements within JAVA applications as without the JAVA Access Bridge enabled and verified, only the entire application window is captured, not the buttons and fields inside it.

36.2.1. Introduction

This guide outlines the technical requirements for using ClickLearn with Java-based applications. The Java Access Bridge must be installed and functioning correctly; otherwise, ClickLearn cannot identify individual buttons or menus and will simply highlight the entire application as a "green rectangle."

36.2.2. JAVA requirements

The ClickLearn JAVA connector may be used on all JAVA based application, which complies to the Oracle accessibility layer.

For this to work, JAVA Access Bridge must be installed properly, otherwise the ClickLearn connector will not work, and you will only have a green rectangle for the entire JAVA application, not the individual screen elements within it.

36.2.2.1. Installing JAVA Access Bridge

Ensure the Java Access Bridge is installed according to Oracle's guidelines. You can view the official setup instructions here:

http://docs.oracle.com/javase/accessbridge/2.0.2/setup.htm

36.2.2.1.1. Sample file listing using JAVA version 6

The folder C:\Program Files\Java must contain a folder named jre6 with the following files:

bin\JavaAccessBridge.dll
bin\JavaAccessBridge-32.dll
bin\JAWTAccessBridge.dll
bin\JAWTAccessBridge-32.dll
bin\JavaMonkey-32.exe
accessibility.properties
ext\access-bridge.jar
ext\access-bridge-32.jar
ext\jaccess.jar

The C:\Windows\system32 folder must contain the following files:
WindowsAccessBridge.dll
WindowsAccessBridge-32.dll

36.2.2.1.2. Test JAVA Access Bridge

To test that all is installed properly, please start your JAVA based application.

Then start the JavaMonkey-32.exe, and select the menu File-Refresh.

The tree structure in this window should contain multiple screen elements, otherwise the installation is not in order.

37. SAP Specific

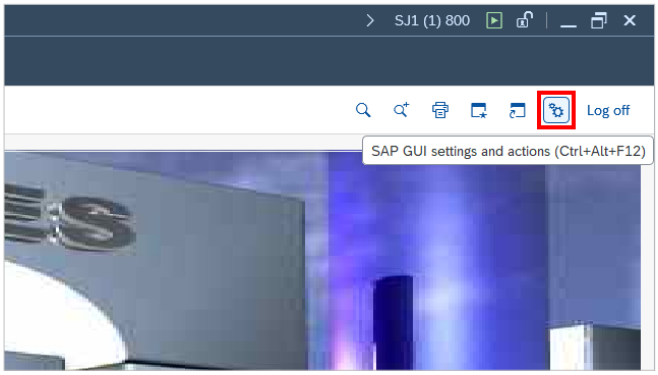
37.1.How to configure SAP

Enable scripting and set the required display theme in SAP GUI as without having both in place, ClickLearn cannot address individual SAP screen elements, only the SAP window as a whole.

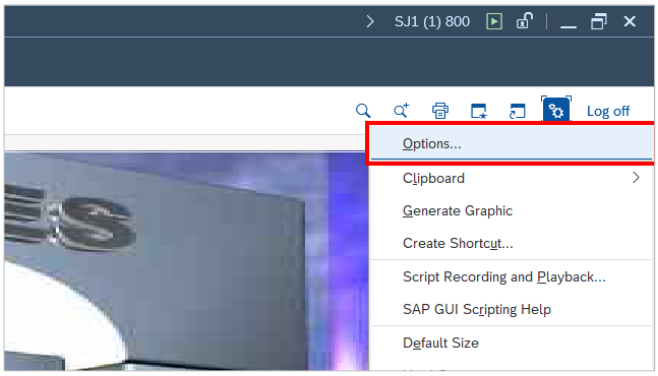
37.1.1. Introduction

This guide provides step-by-step instructions on how to configure your SAP environment for optimal compatibility with ClickLearn recording, replay, and assistance features. Please follow these steps to ensure all necessary options are enabled and recommended settings are applied for a smooth recording experience.

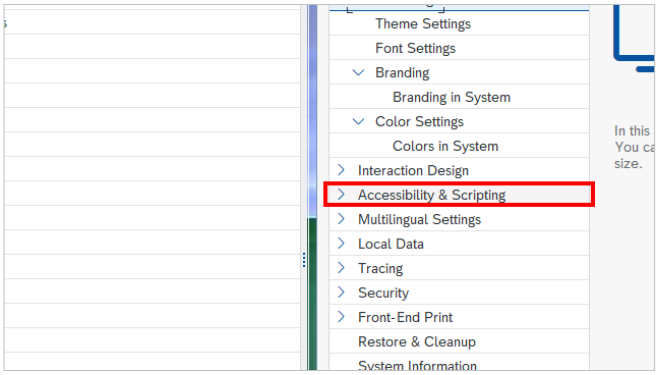
Click on the button **SAP GUI settings and actions**.



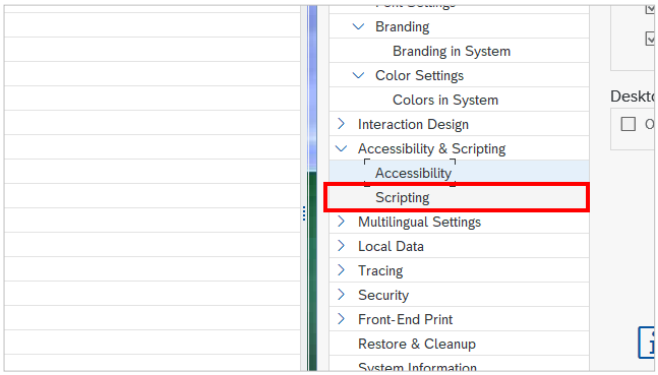
Select the menu **Options...**



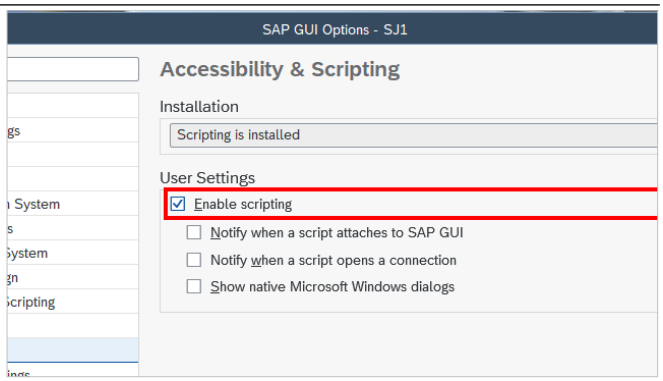
Click on **Accessibility & Scripting**



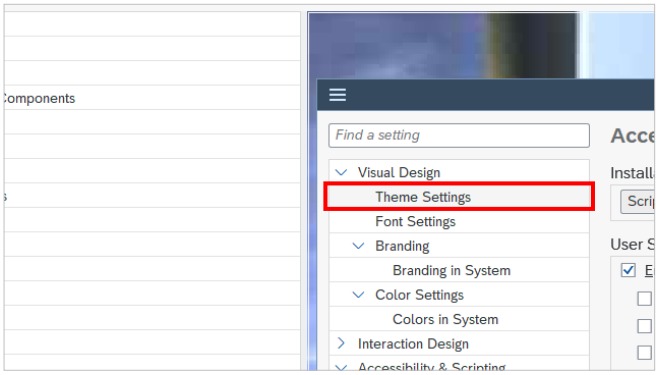
Select the menu **Scripting**



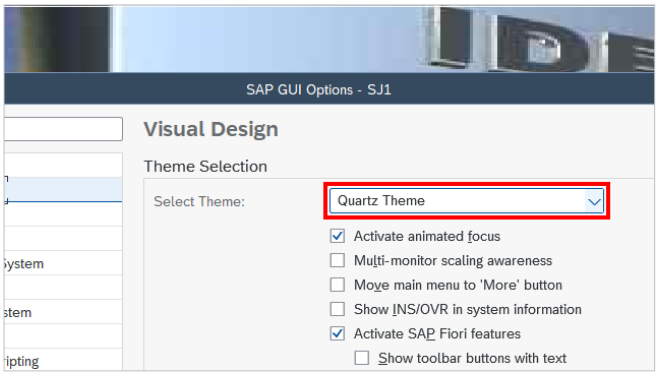
Only the **Enable scripting** option must be checked, all other options must remain unchecked



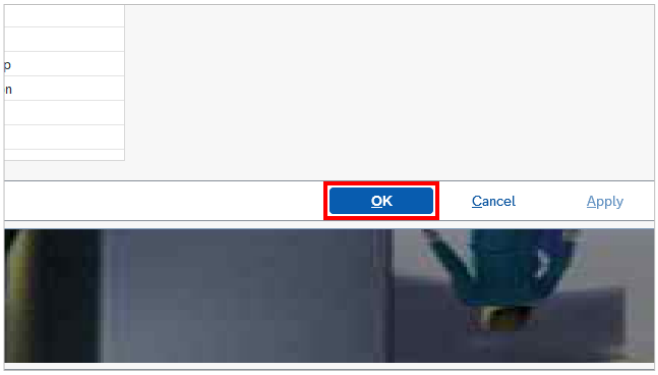
Click on the **Theme Settings**



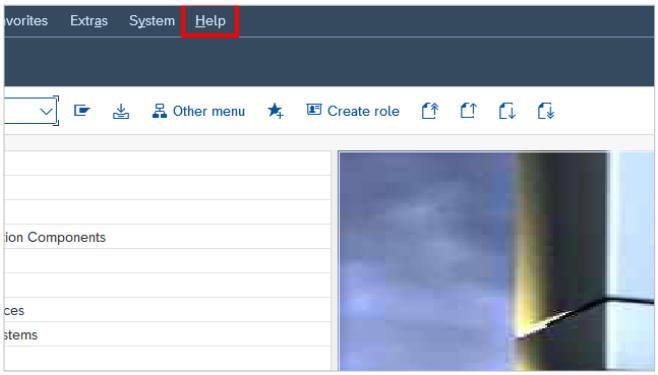
Click on the **Quartz Theme**



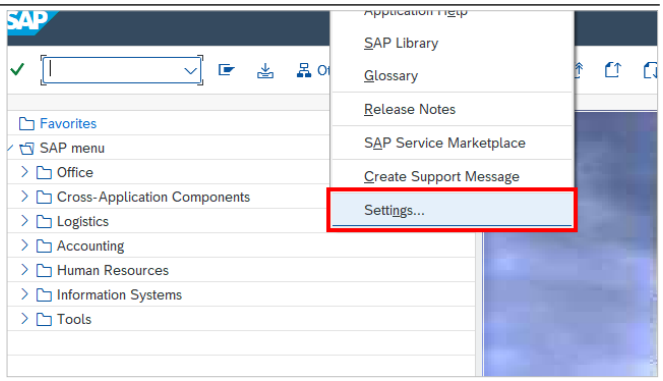
Click on the button **OK**.
You may also press **Alt+O**.



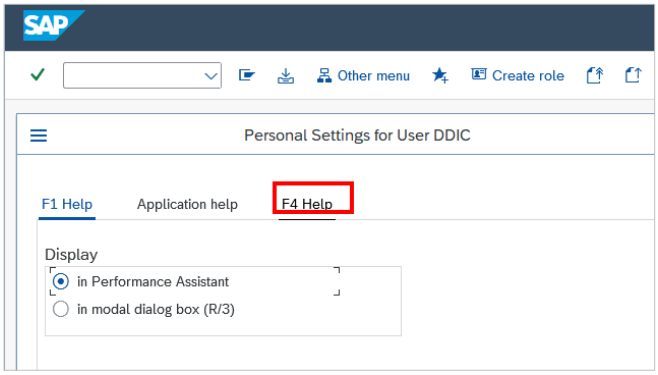
Click on the button **Help**



Select the menu **Settings...**

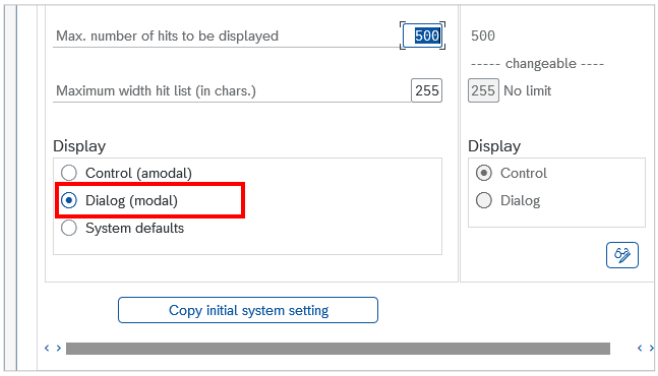


Select the tab named **F4 Help**

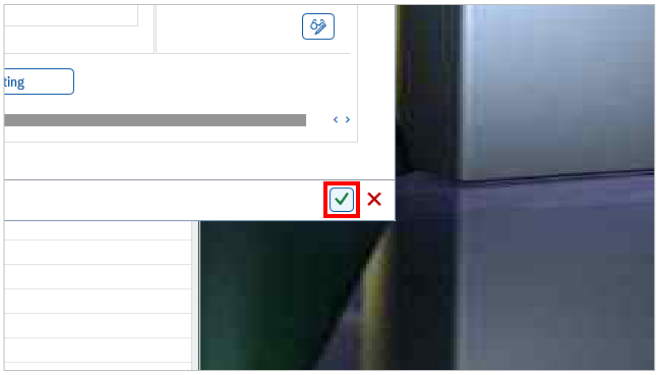


Click on radio button **Dialog (modal)**

Make sure this option is set.



Click on the button **Copy** on the toolbar



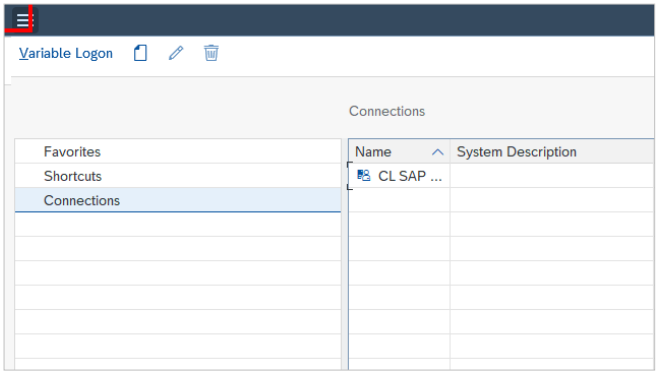
37.2.SAP Logon requirements

Confirm your SAP Logon setup meets ClickLearn's requirements before you configure scripting, so the connection to your SAP system doesn't block recording later.

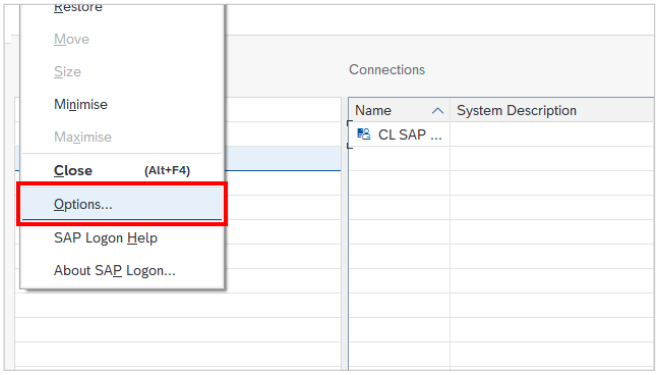
37.2.1. Introduction

Follow these steps to check your SAP scripting settings. This will ensure ClickLearn works correctly with SAP. Please complete these steps before recording or replaying actions. If scripting is enabled, SAP may ask for extra permissions each time you use ClickLearn.

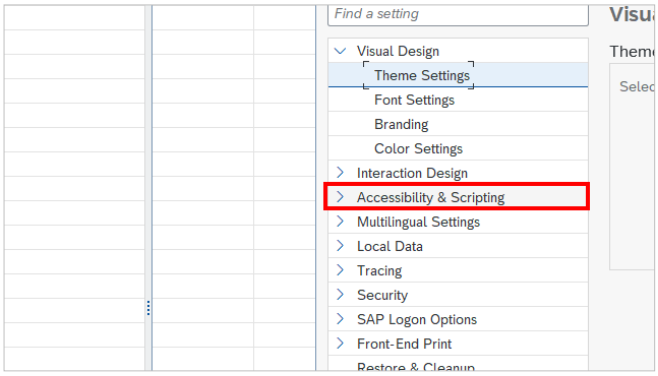
Click on the menu **System**.



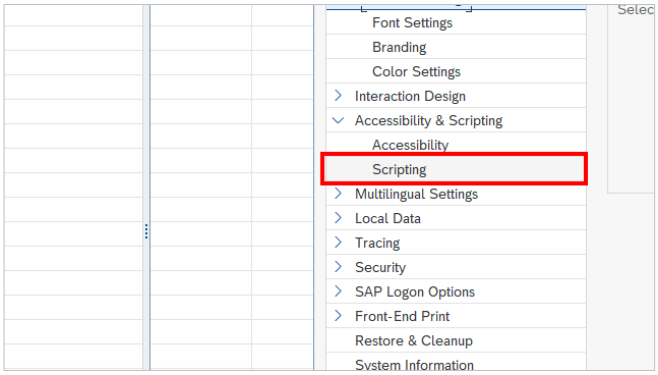
Click on the menu **Options...**.



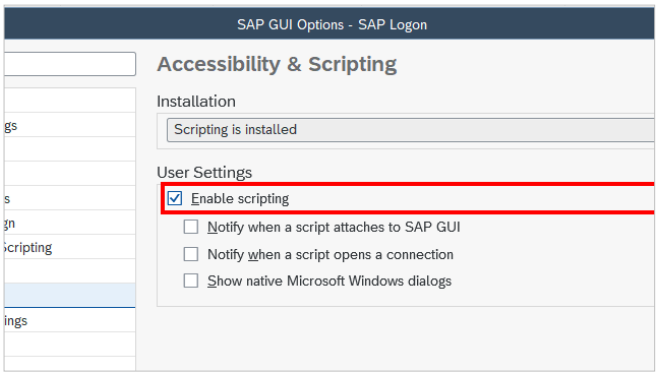
Click on **Accessibility & Scripting**



Click on **Scripting**



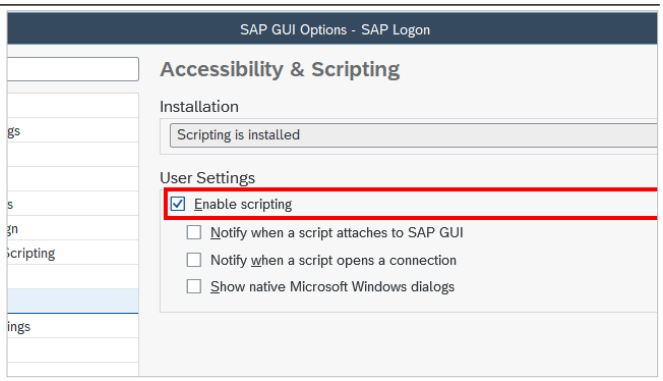
Move the mouse to the checkbox **Enable scripting**. You may also press **Alt+E**.



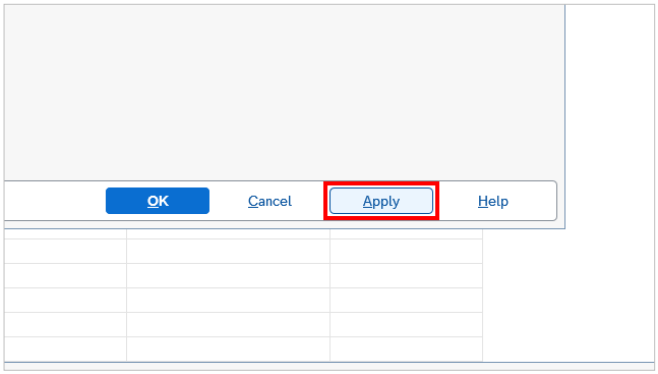
The installation must state that scripting is installed.

If scripting is not installed or enabled, please refer to **SAP OSS Note 480149**.

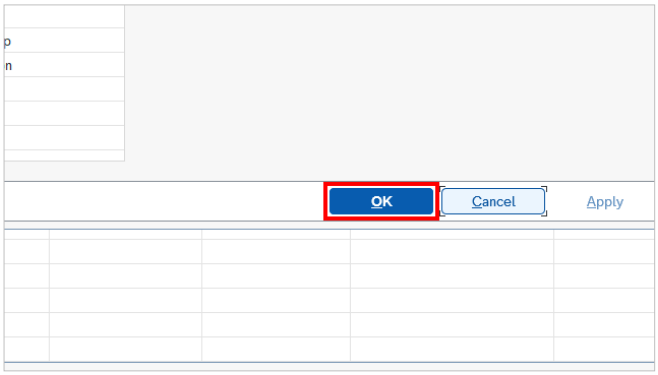
Only the Enable scripting option must be checked, all other options must remain unchecked



Click on the button **Apply**.
You may also press **Alt+A**.



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



38. IFS Specific

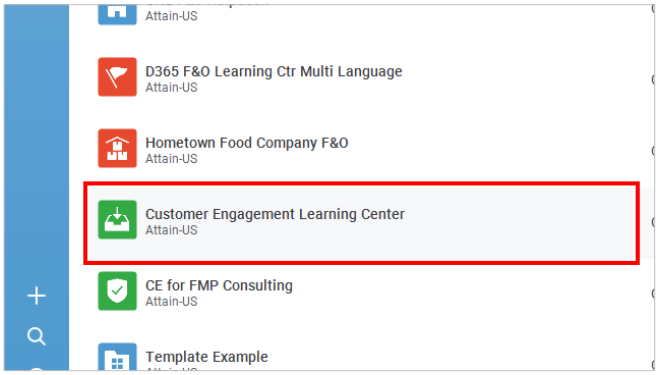
38.1.Create a ClickLearn Table of Contents

Build a structured, navigable table of contents for your IFS documentation straight from your project data, so users find the right guide inside IFS instead of scrolling through a flat, unsearchable list.

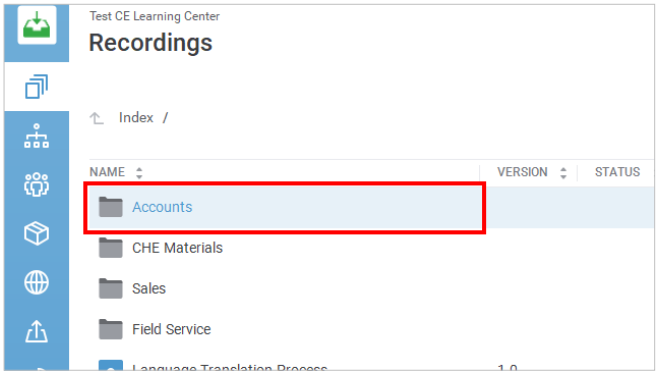
38.1.1. Introduction

Follow these instructions to create a table of contents from your ClickLearn recordings within the project you wish to download, and choose a location where you can easily access them.

To begin with, locate and open the project of the recordings you would like to download.
Double-click on the grid cell **NAME** with the value **Customer Engagement Learning Center**.

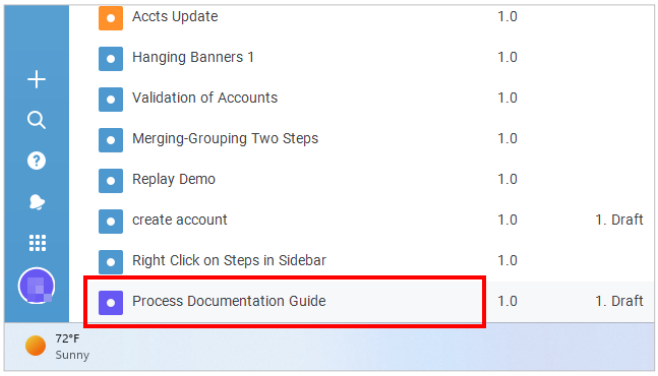


After opening your project, select all the folders and recordings from your list of recordings.
Click on the grid view cell **NAME** with data **Accounts**.

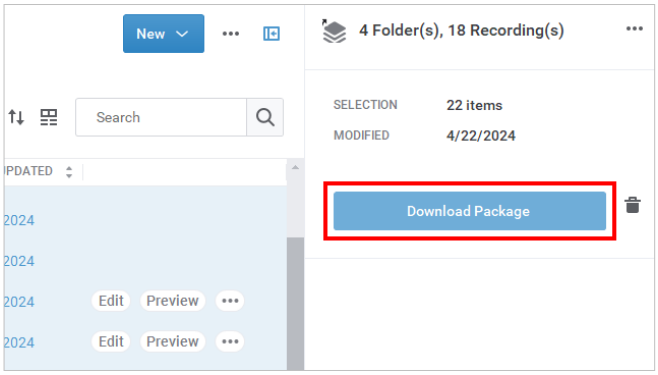


Select all of your recordings.
Press and hold the **Shift** key down.

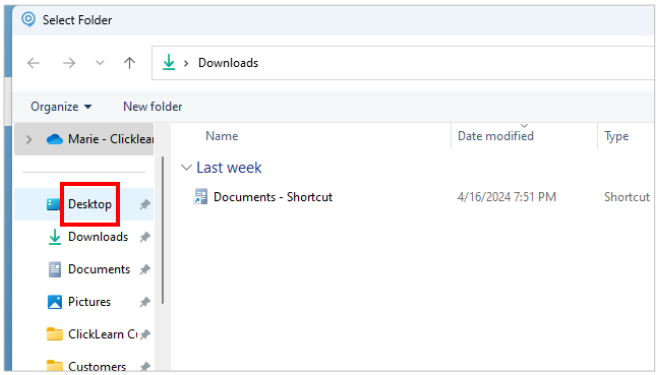
Click on the grid view cell **NAME** with the data **Process Documentation Guide**.



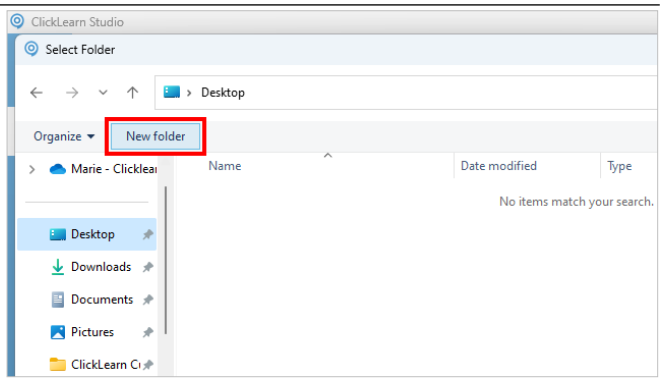
Click on the button **Download Package**.



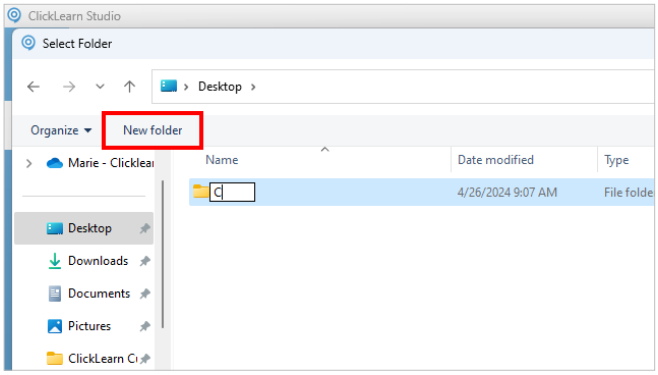
Navigate to the designated location where you intend to save your recordings.
Click on the folder **Start of Quick Access - Desktop (pinned)**.



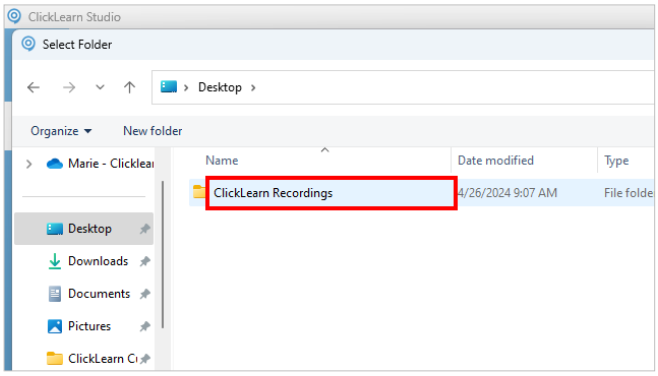
Create a folder to store your Clicklearn recordings.
Click on the button **New folder**.



Enter **New folder**.

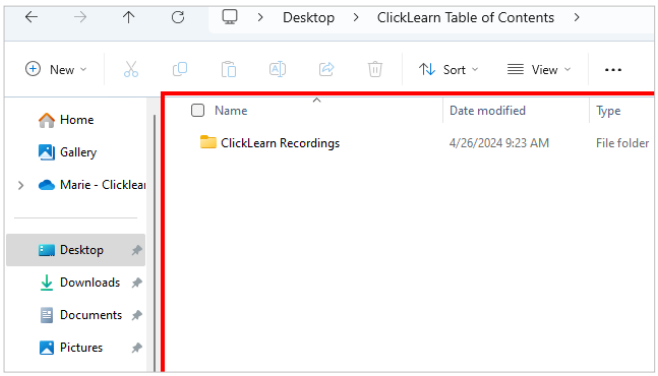


Click on Name.

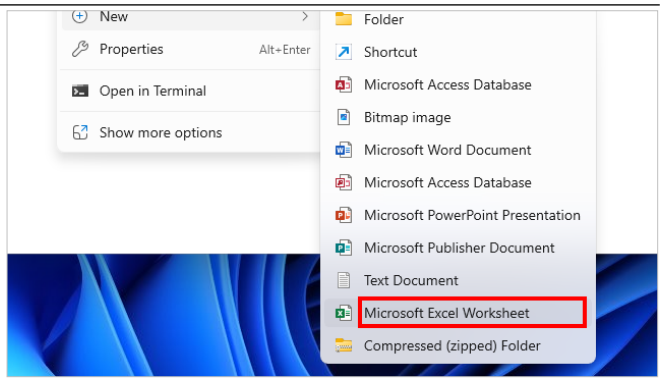


38.1.2. Create an Excel Sheet

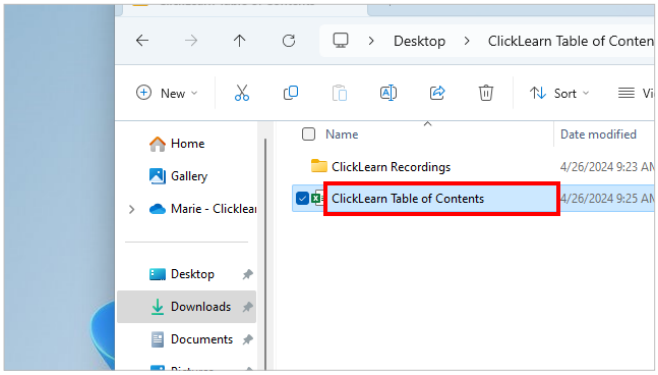
Right-click on the list.



Click on **Microsoft Excel Worksheet**.

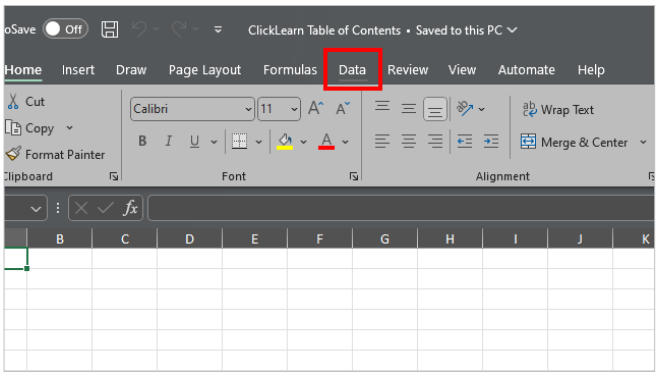


Double click on Name.

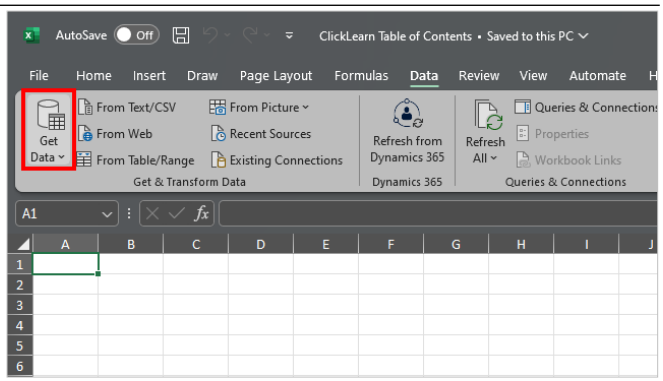


38.1.3. Import the Data

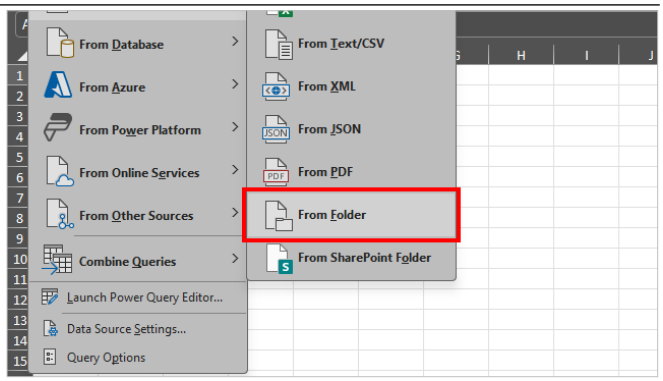
Click on the tab **Data**.



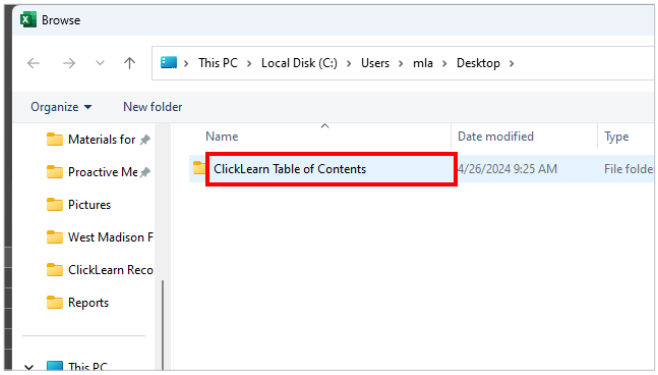
Click on the drop-down button: **Get Data**.



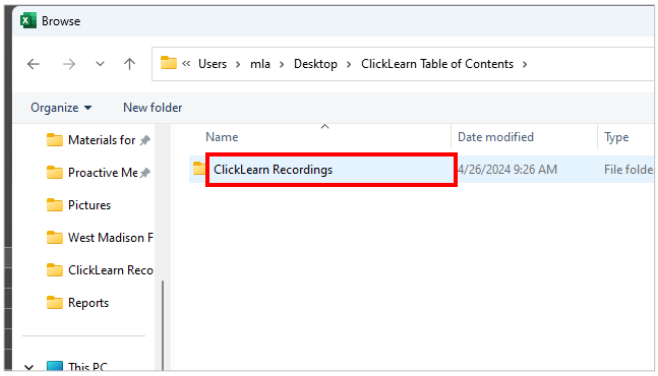
Click on the menu **From Folder**.



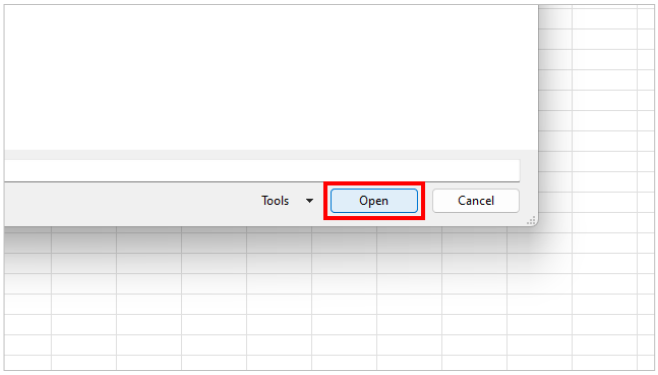
Double click on Name.



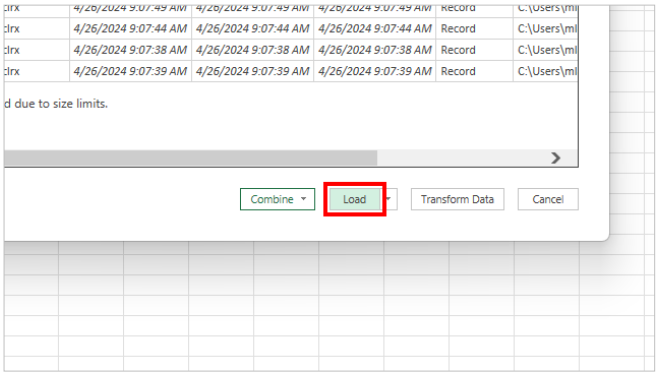
Double click on Name.



Click on the **Open** button.

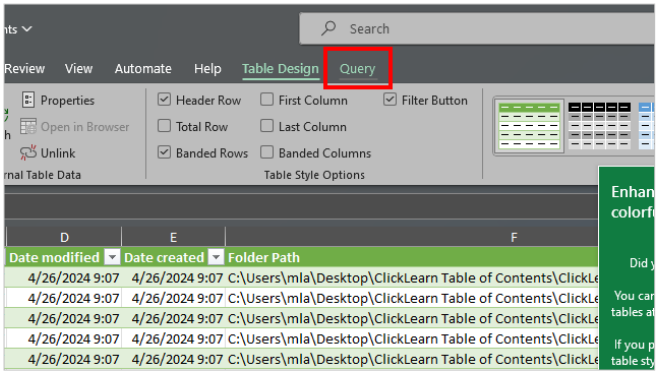


Click on **Load**.

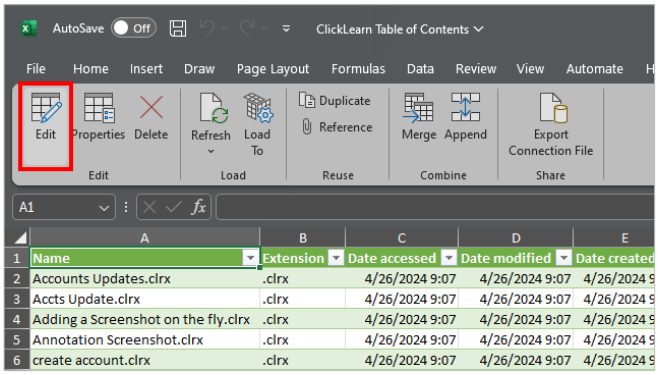


38.1.3.1. Edit your Query Fields

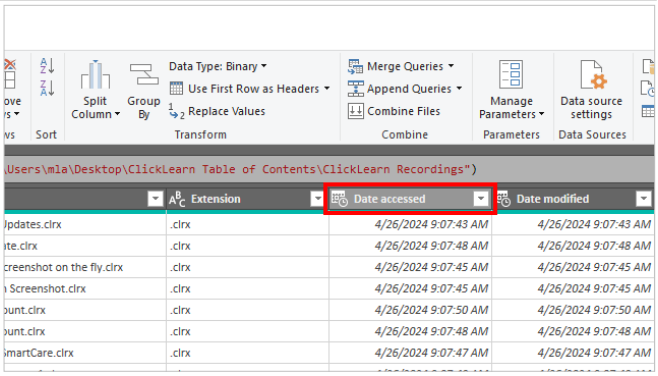
Click on the **Query** tab.



Click on the button **Edit**.

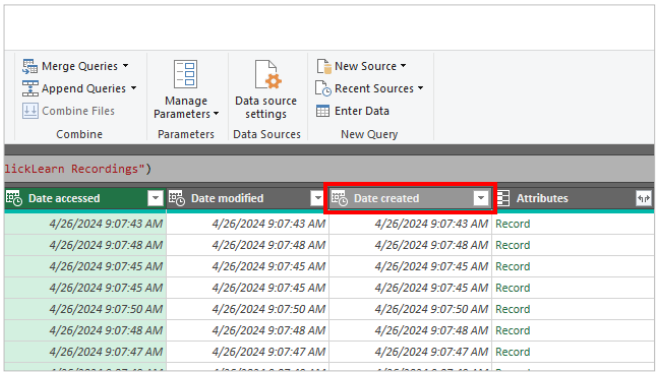


Since the date will show the date downloaded for all columns, it is recommended to delete those columns unless you see value in keeping one or all of them.
Click on **Date accessed**.

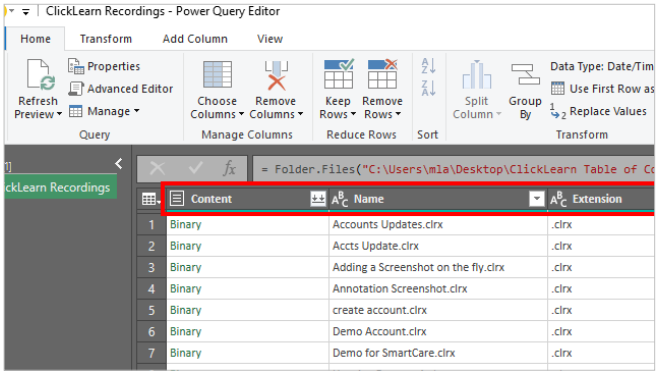


Press and hold the **Shift** key down.

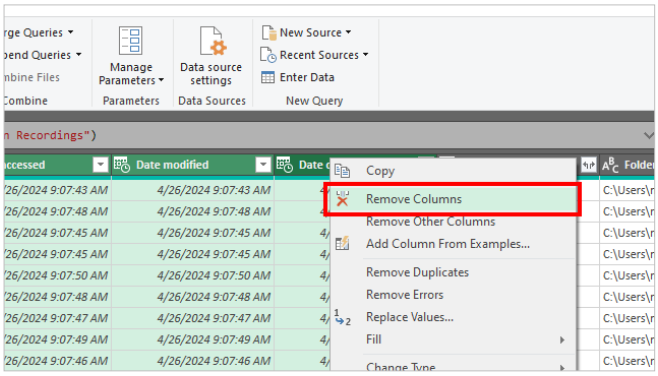
Click on the **Date created.**



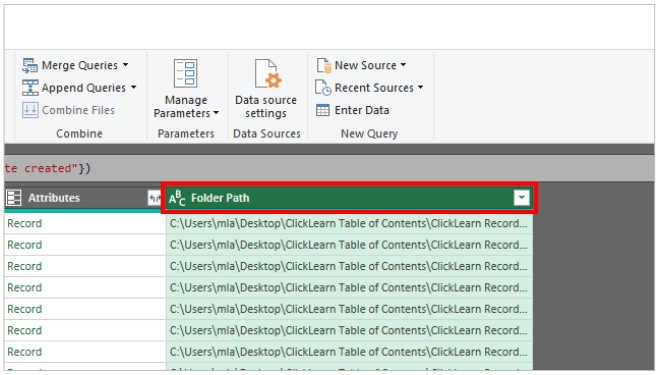
Right-click on the column.



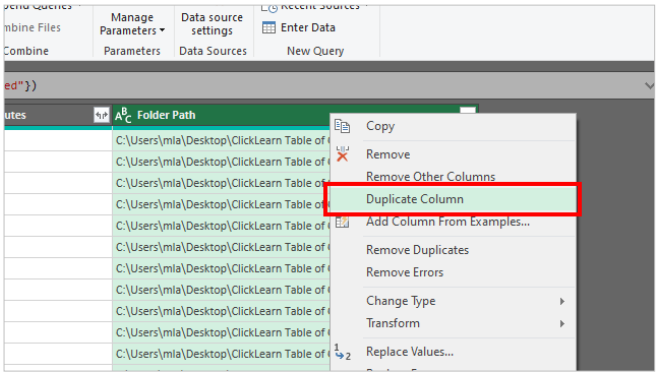
Click on the menu **Remove Columns 2 of 17**.



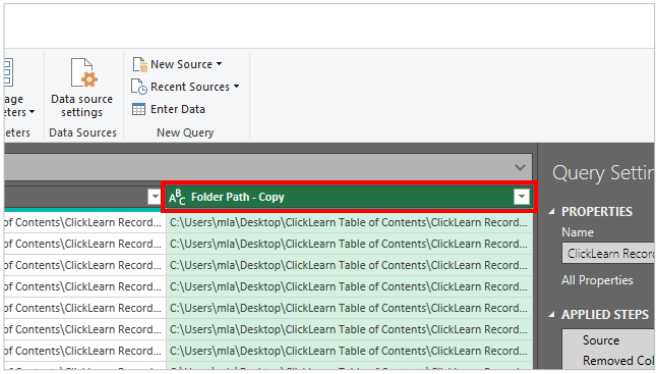
Right-click on **Folder Path**.



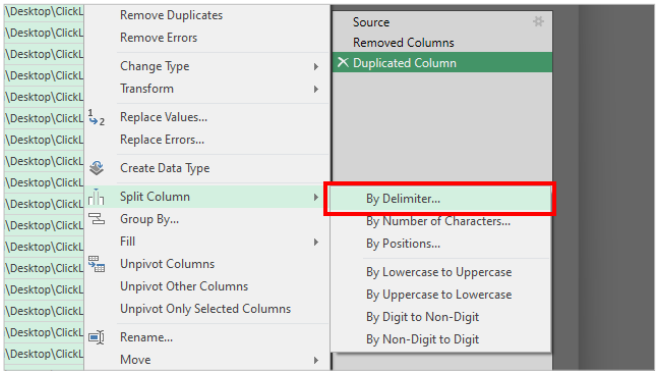
Click on the menu **Duplicate Column 4 of 22**.



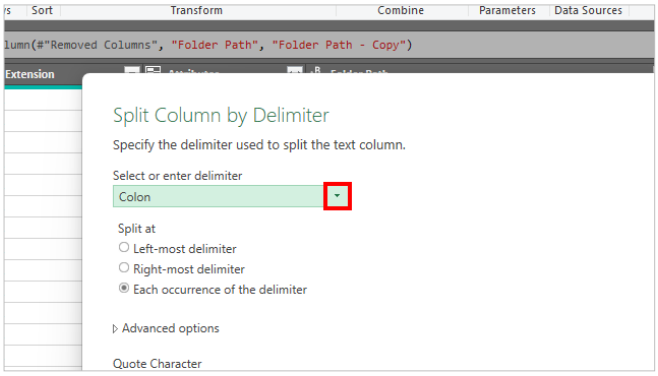
Right-click on **Folder Path - Copy**.



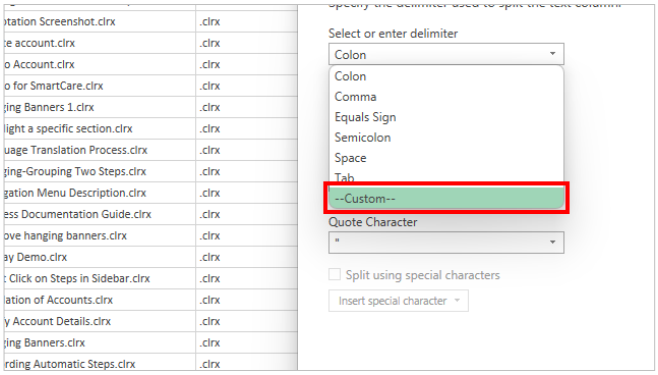
Click on the menu **By Delimiter 1 of 7**.



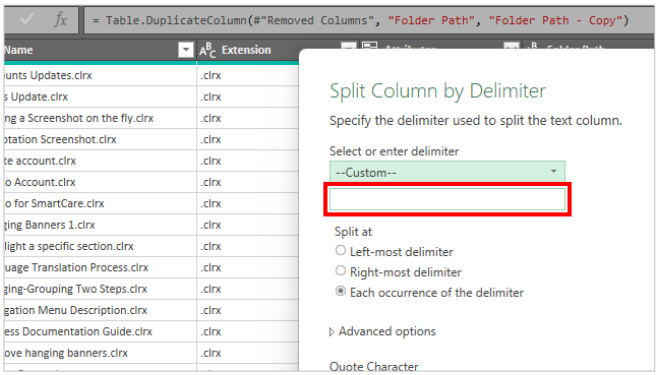
Click on the drop-down.



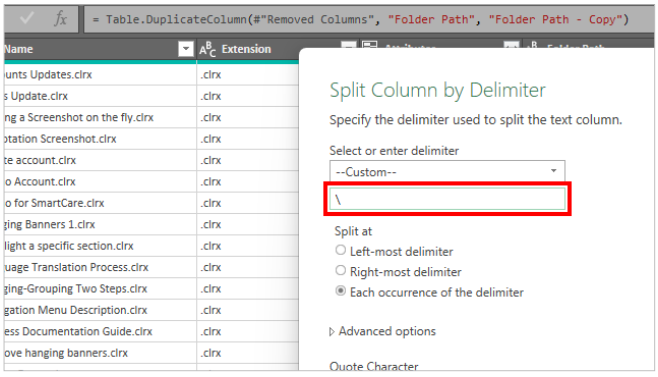
Click on the item **Custom**.



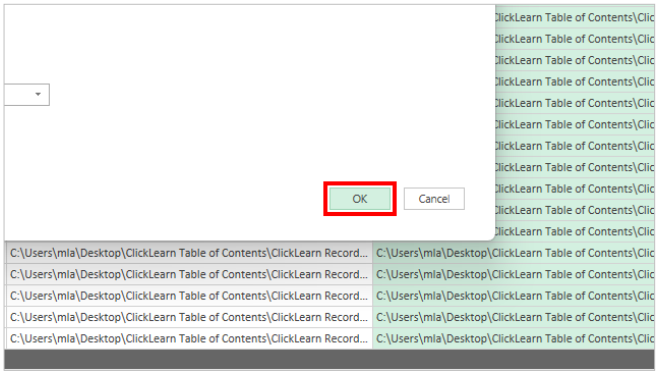
Click on the input field.



Enter the text \.

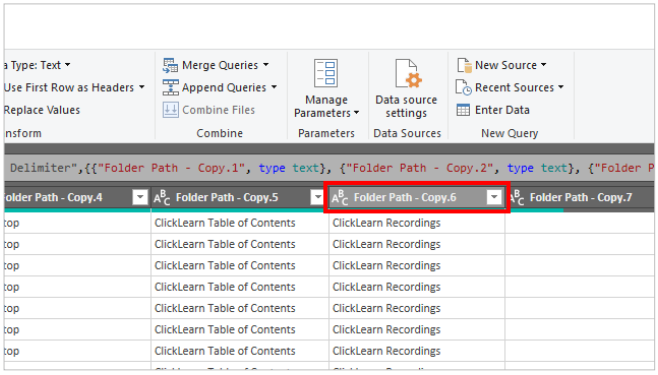


Click on **OK**.

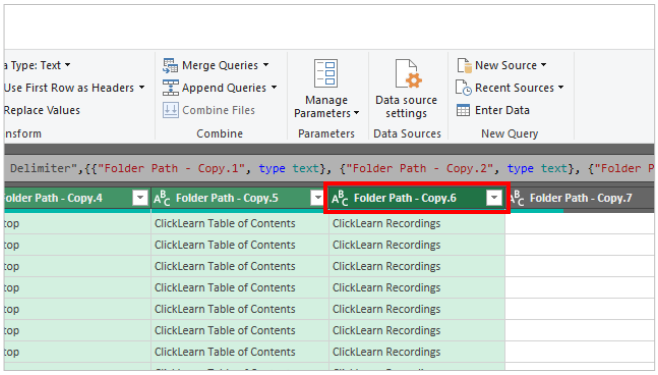


You can eliminate unnecessary and redundant columns, such as "ClickLearn Recordings."

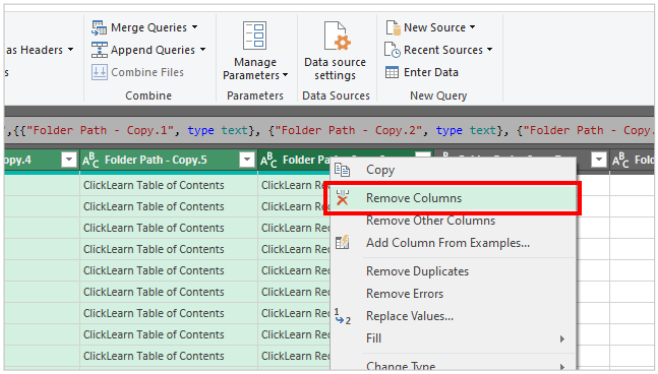
Remove the columns you do not need and are redundant information, such as "ClickLearn Recordings."
Press and hold the **Shift** key down.
Click on **Folder Path - Copy.6**



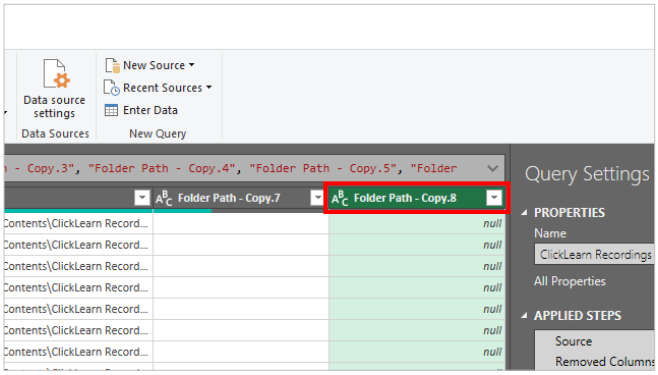
Right-click on **Folder Path - Copy.6**.



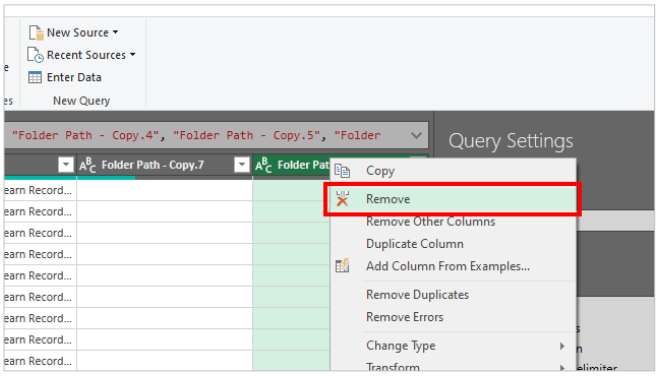
Click on the menu **Remove Columns 2 of 17**.



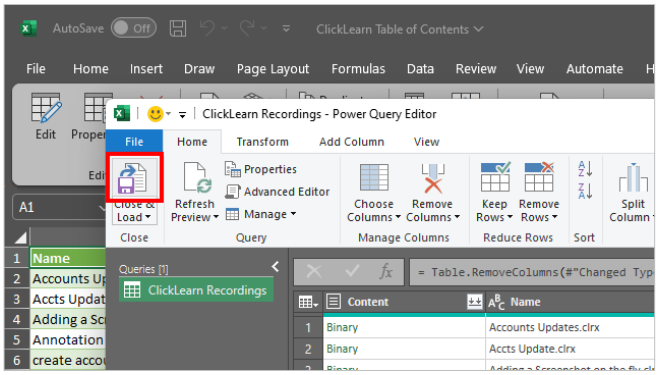
Right-click on **Folder Path - Copy.8**.



Click on the menu **Remove, 2 of 22**.

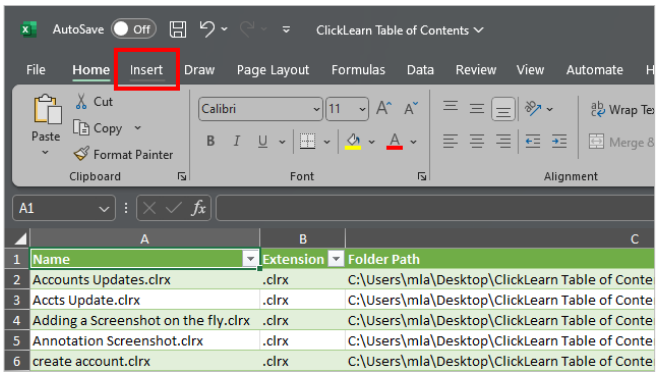


Click on the split button **Close & Load**.

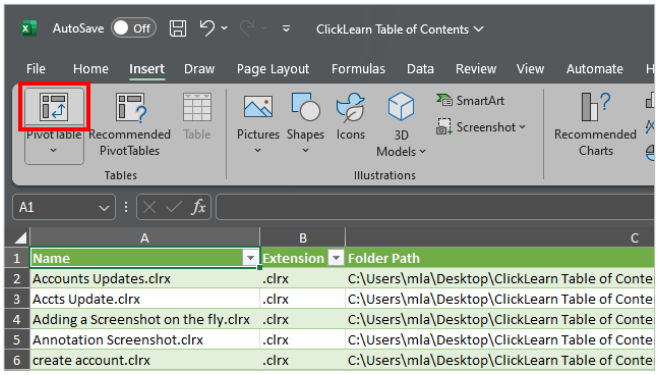


38.1.3.1.1. Create a Pivot Table

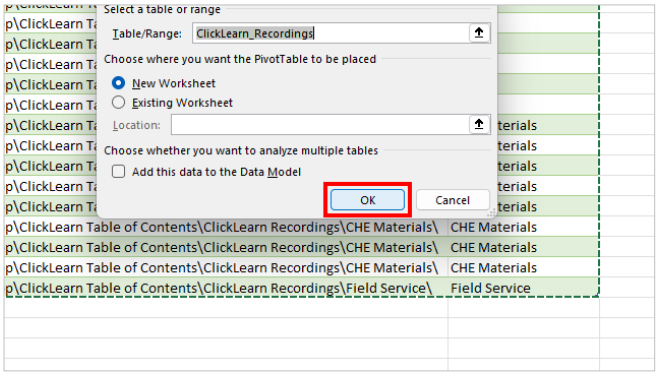
Click on the tab **Insert**.



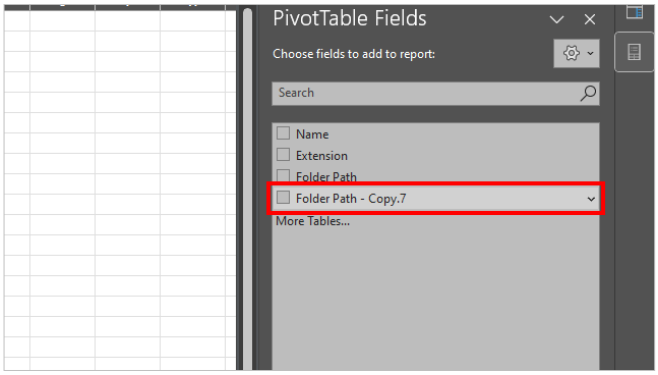
Click on the split button **PivotTable**.



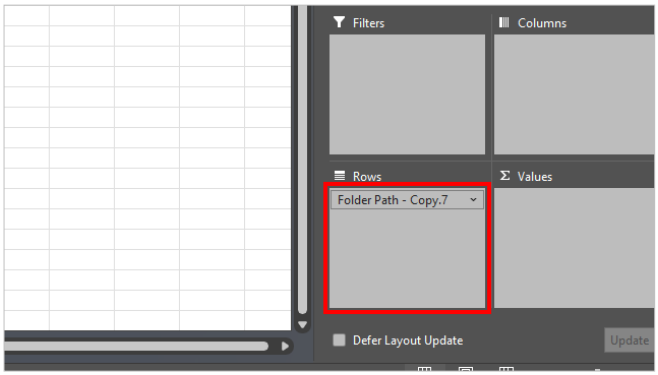
Click on the button **OK**.



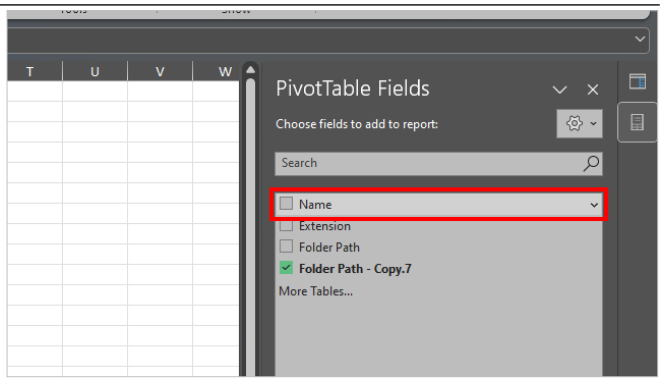
Press the left mouse button on **Folder Path - Copy.7 Checkbox Unchecked**.



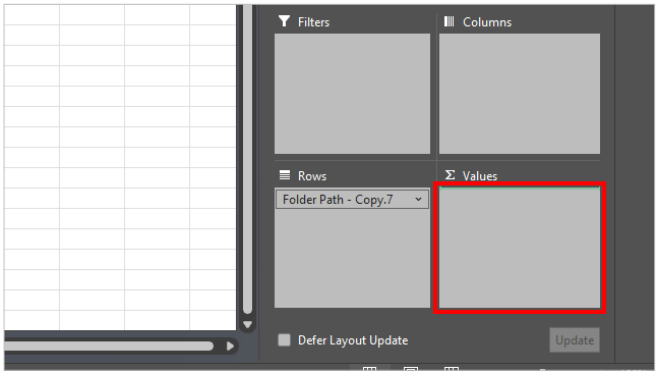
Release the left mouse button on the area.



Click and hold the left mouse button on the **Name Checkbox Unchecked**.

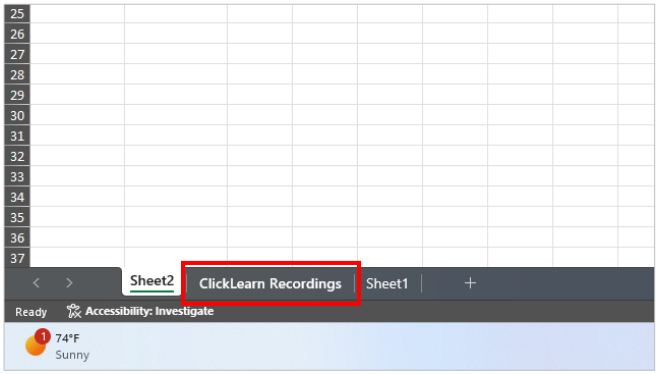


Release the left mouse button on the area.



38.1.3.1.1.1. Refresh your data

Click on the tab **ClickLearn Recordings**.



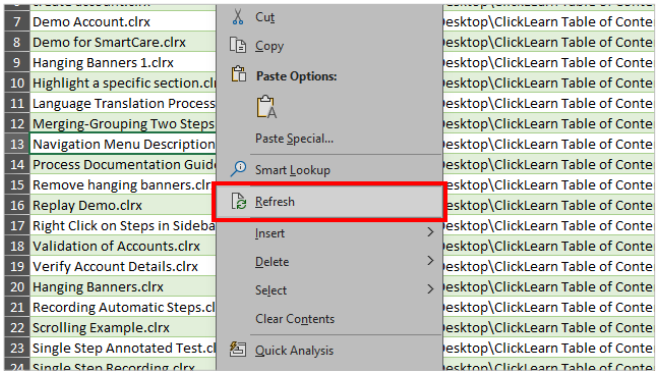
Click on the cell **A13** with the value **Navigation Menu Description.clrx**.

4	Adding a Screenshot on the fly.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
5	Annotation Screenshot.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
6	create account.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
7	Demo Account.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
8	Demo for SmartCare.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
9	Hanging Banners 1.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
10	Highlight a specific section.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
11	Language Translation Process.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
12	Merging-Grouping Two Steps.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
13	Navigation Menu Description.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
14	Process Documentation Guide.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
15	Remove hanging banners.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
16	Replay Demo.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
17	Right Click on Steps in Sidebar.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
18	Validation of Accounts.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
19	Verify Account Details.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
20	Hanging Banners.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
21	Recording Automatic Steps.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte

Right-click on cell **A13** with the value **Navigation Menu Description.clrx**.

4	Adding a Screenshot on the fly.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
5	Annotation Screenshot.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
6	create account.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
7	Demo Account.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
8	Demo for SmartCare.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
9	Hanging Banners 1.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
10	Highlight a specific section.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
11	Language Translation Process.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
12	Merging-Grouping Two Steps.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
13	Navigation Menu Description.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
14	Process Documentation Guide.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
15	Remove hanging banners.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
16	Replay Demo.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
17	Right Click on Steps in Sidebar.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
18	Validation of Accounts.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
19	Verify Account Details.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
20	Hanging Banners.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte
21	Recording Automatic Steps.clrx	.clrx	C:\Users\mla\Desktop\ClickLearn Table of Conte

Click on the menu **Refresh**.

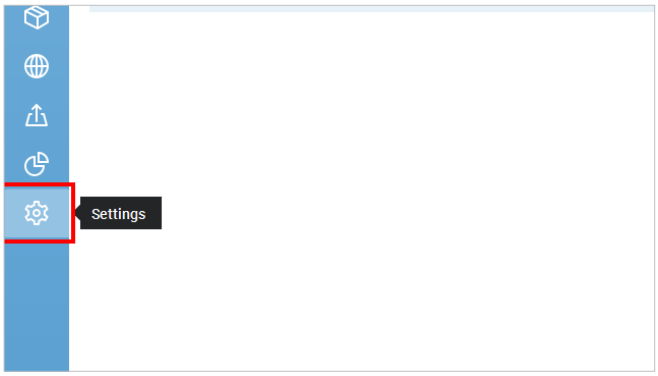


Moving forward, you can delete the ClickLearn recordings you have downloaded, re-download them, and refresh the data in the Excel sheet.

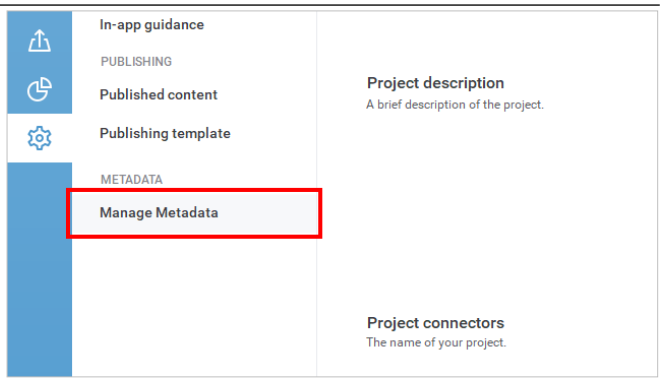
38.2.Enabling Metadata

Metadata ready to use in a few clicks, to enable user editing, add description and document properties, and save without complex configuration.

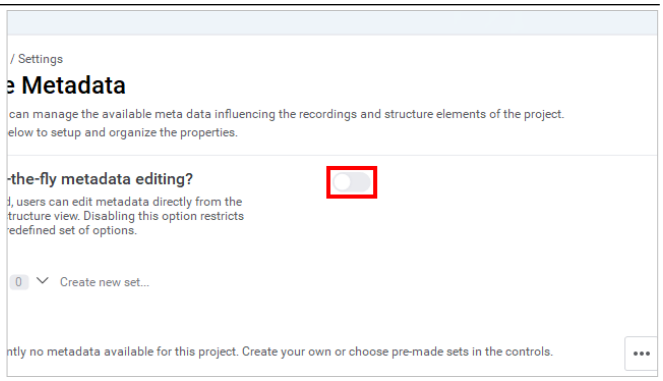
Click on the **Settings** button.



Click on the button **Manage Metadata**.

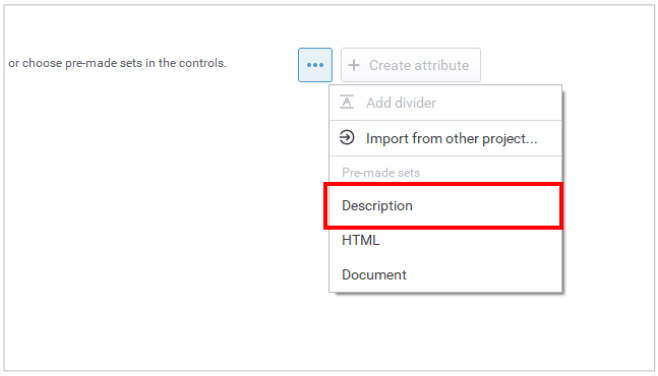


Click on the toggle switch: **Allow User Edit Properties**.

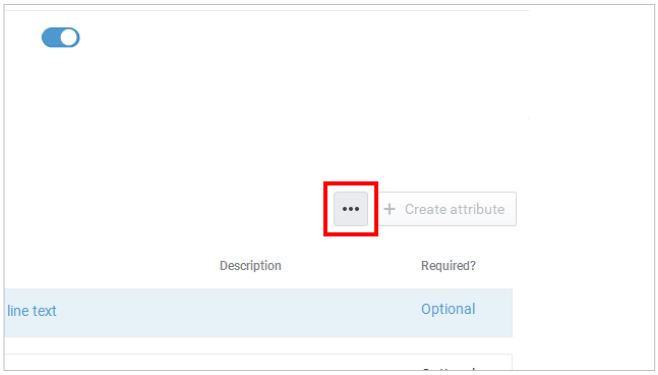


Click on the icon **Metadata more**.

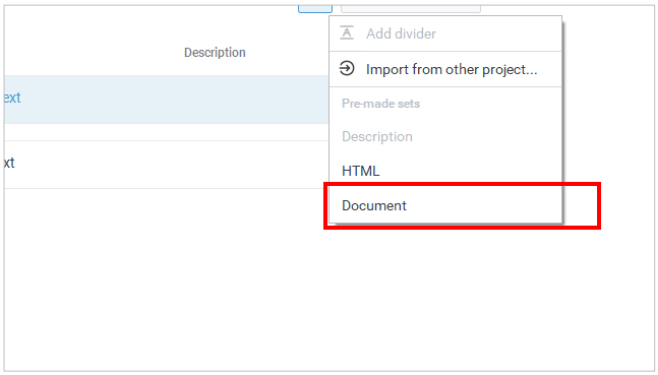
Click on the menu item **Description**.



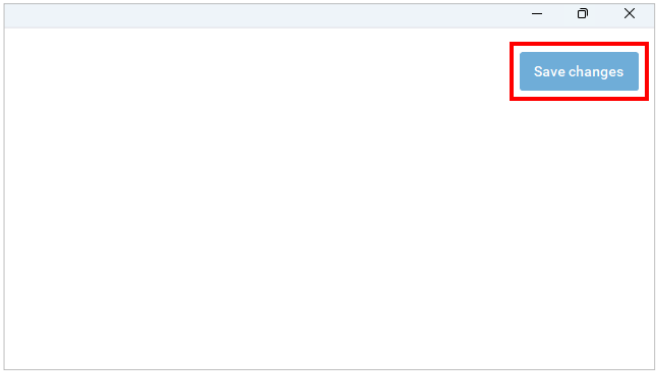
Click on the icon **Metadata more**.



Click on the menu item **Document**.



Click on the button **Save changes**.



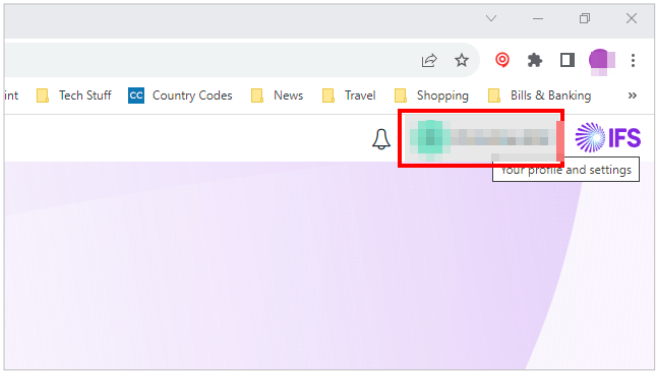
38.3.IFS Cloud Embed CL Portal Link

Embed the ClickLearn Portal directly inside IFS Cloud so that users get guidance in the context of the screen they're working on, without leaving IFS to find it.

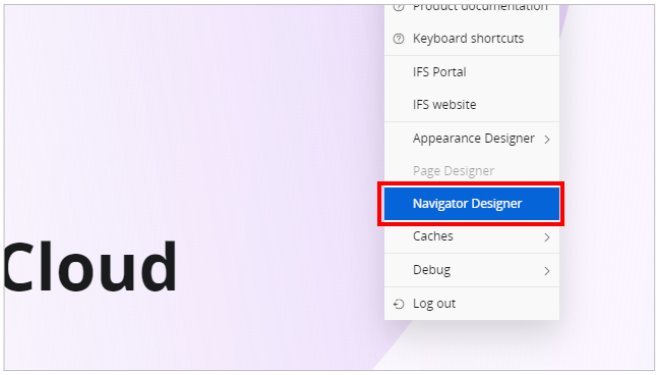
38.3.1. Introduction

Before creating the shortcut, copy your learning link from the project using (Ctrl + C).

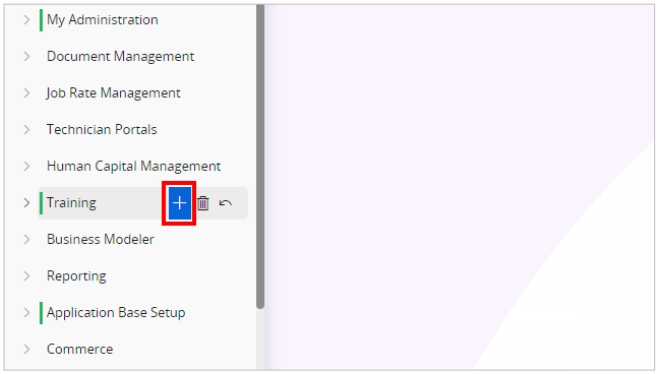
Click on the button: **Your profile and settings**.



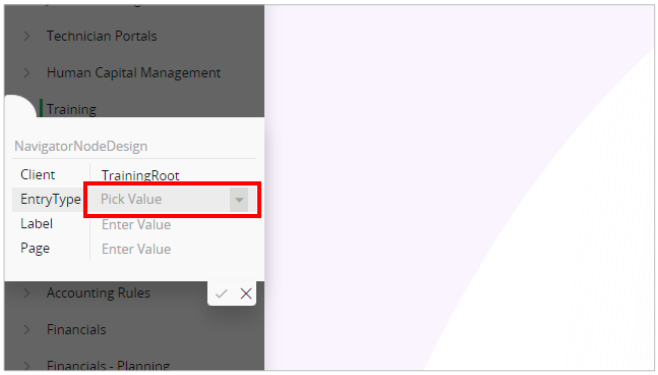
Click on the button **Navigator Designer**.



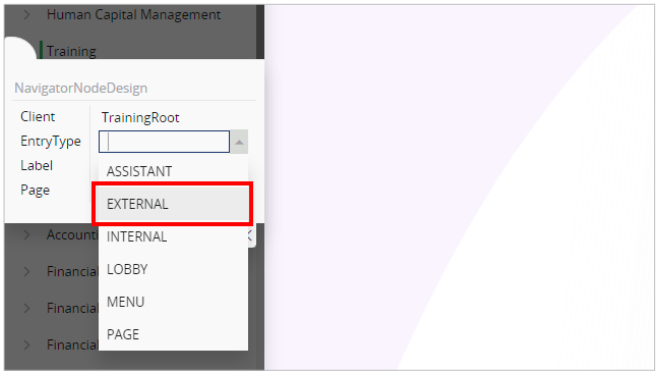
Click on the button **Add Element**. You can place the link in any available navigation menu item. Additionally, the same link can be embedded in multiple locations within the menu.



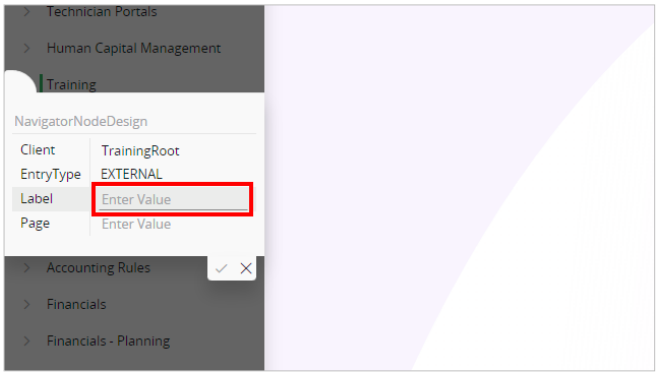
Click on the grid cell.



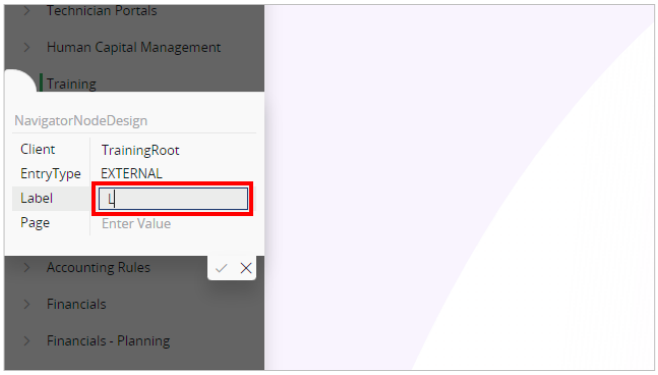
Click on **EXTERNAL**.



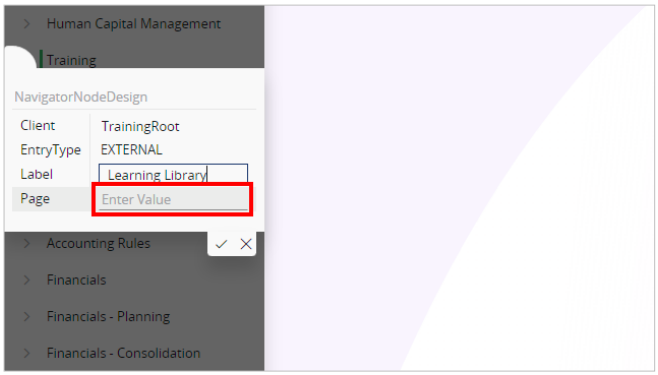
Click on the input field **Enter Value**.



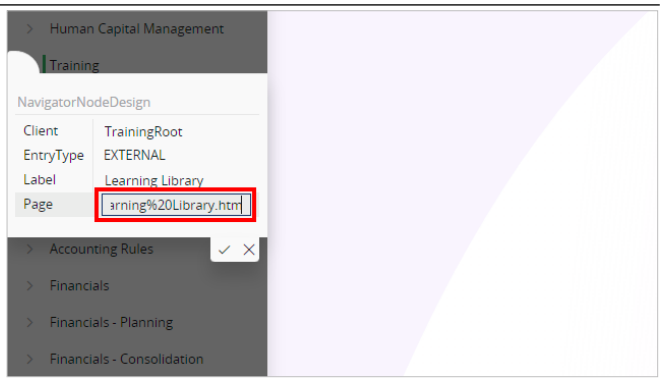
Enter the text **Learning Library** or whatever the name of your learning portal is.



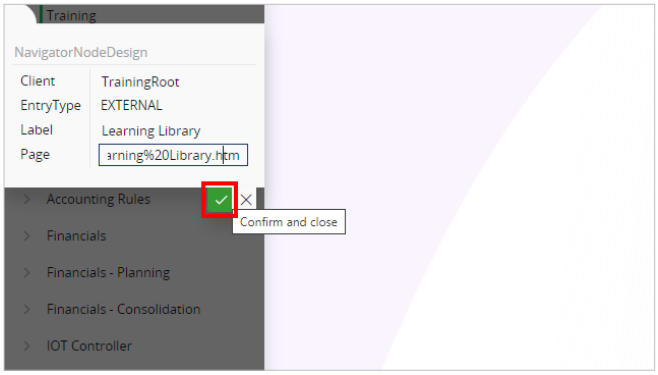
Click on the input field **Enter Value**.



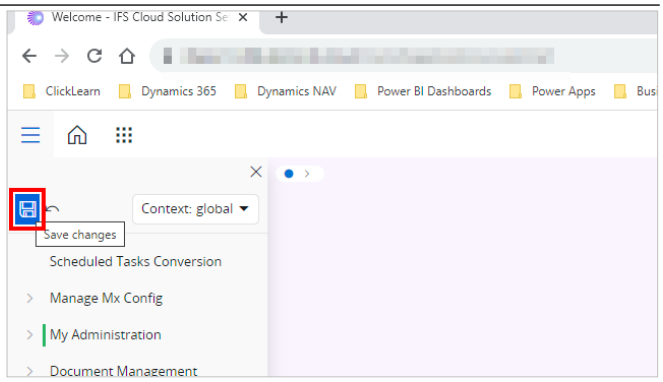
Press **CTRL+v**.



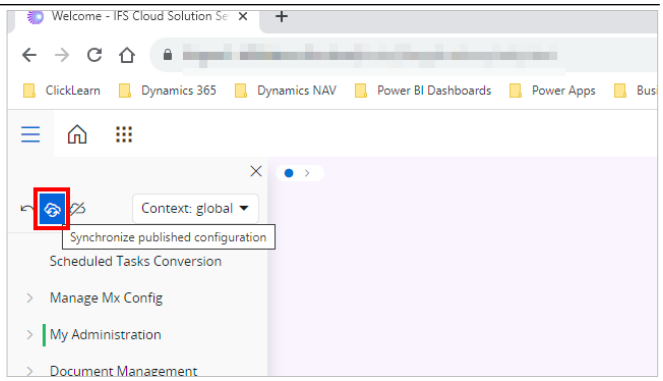
Click on the button: **Confirm and close**.



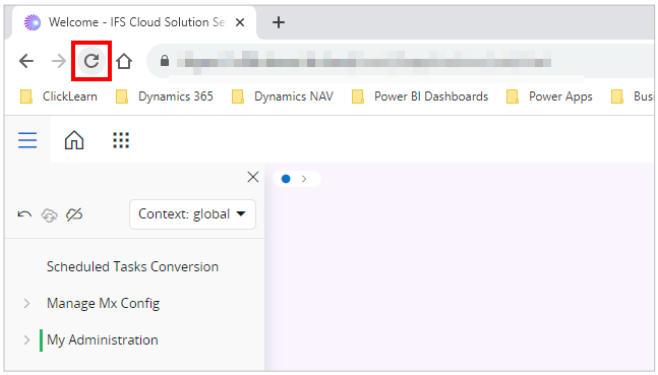
Click on the button **Save changes**.



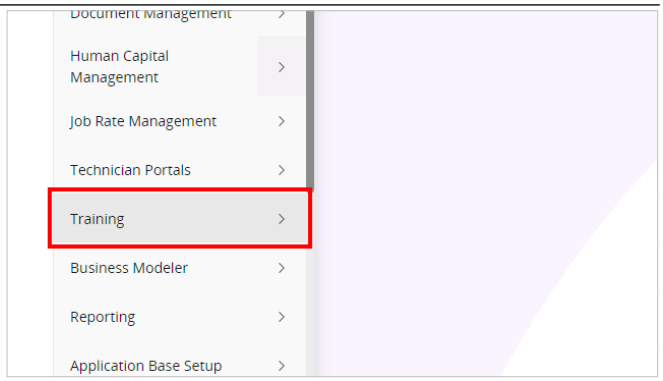
Click on the button **Synchronize published configuration**.



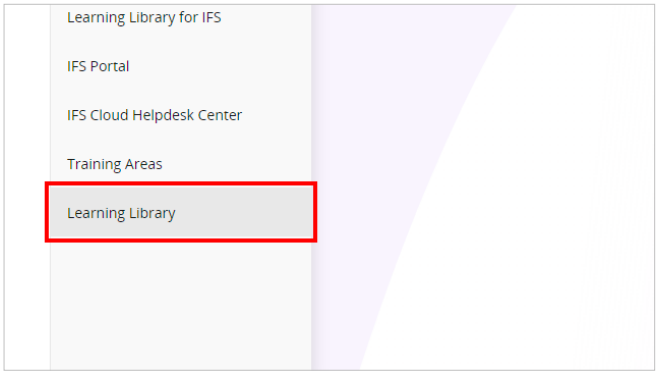
Click on the button **Reload**.



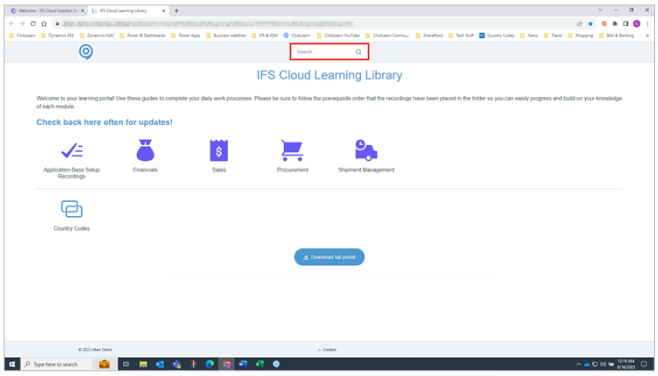
Click on the navigation sub-menu **Training**. You can use the Search Page field at the top of the Navigation Menu to find the learning library by name. A minimum of three characters is needed to search.



Navigate to the **Learning Library**.



Click on the input field **Search** to confirm you can see your learning materials.



38.4.IFS Scope Tool

Define exactly which parts of your IFS environment ClickLearn documents and manages, so your team isn't recording and maintaining more content than the business process actually requires.

38.4.1. Introduction

Follow these steps to import your IFS scope tool into your project. To get started, ensure you have the following items from IFS or your Implementation Partner:

- A .csv file.
- A zipped folder containing the scoped tool
- Confirmation that the Scope tool has been published.

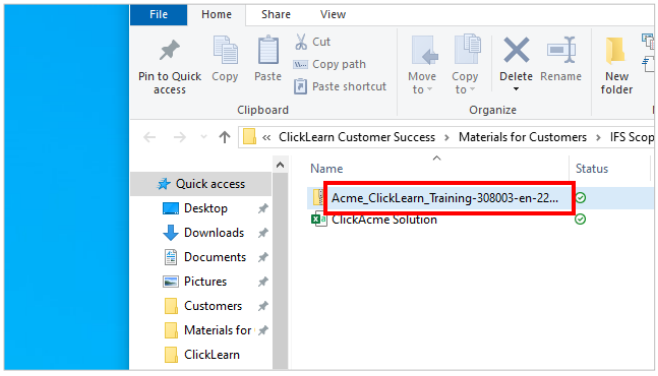
Once you have the above list, you are ready to begin the import process.

Once you have prepared the above, you are ready to begin.

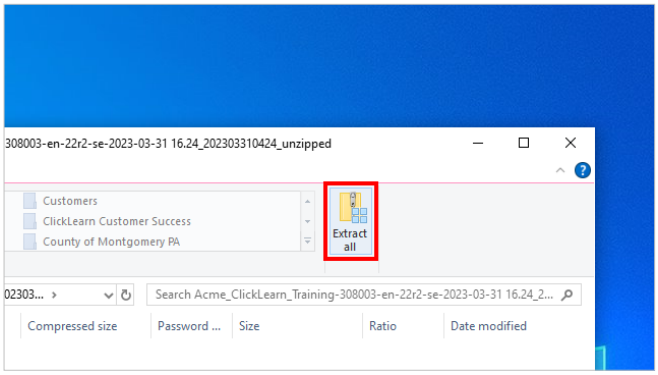
38.4.2. Prepare Your Files

To begin with, extract the files from the zipped folder into an easily accessible location. Create a folder with the contents of the unzipped file and a short name and path, for example, c:\ifs. Copy the extracted contents into this root-level folder, like c:\ifs.

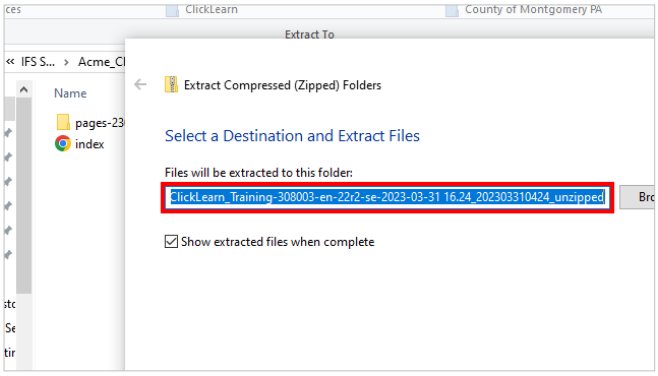
NOTE: Ensure you store these files where you can easily access them.
Double-click on the folder **Name** to extract your files.



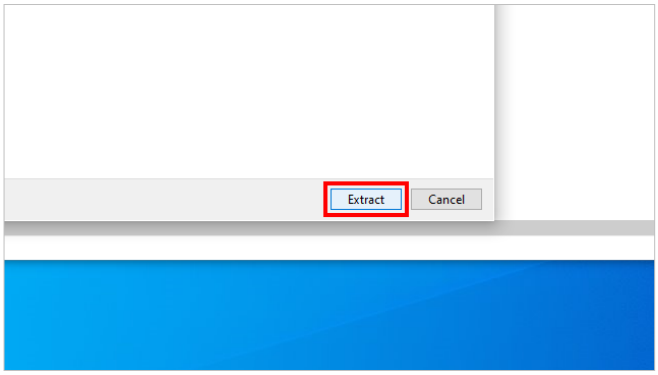
Click on the button **Extract all**.



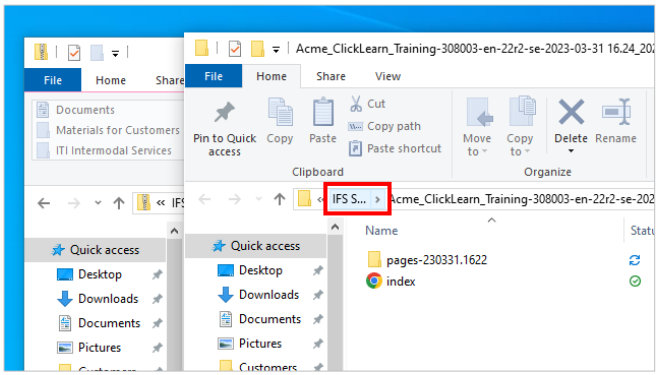
Click on **Files will be extracted to this folder**.



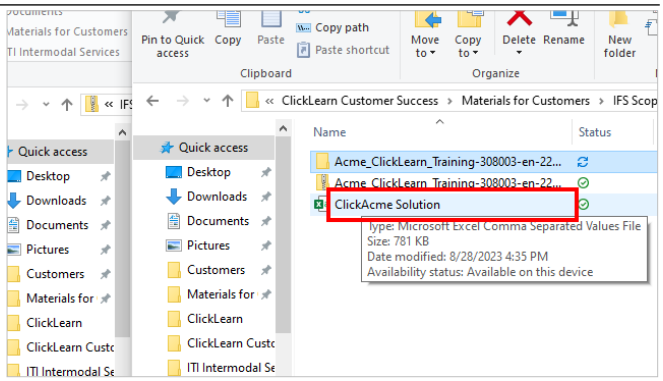
Click on the button **Extract**.
You may also press **Alt+E**.



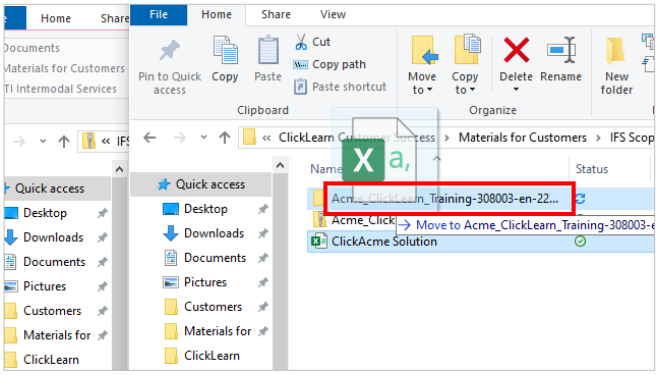
After extracting your files, add the .csv file to the same folder. You can do this by dragging and dropping the file into the folder or copying and pasting it.
Click on the folder name **IFS Scope Tool**.



Click and hold the left mouse button on the input field **Name**.



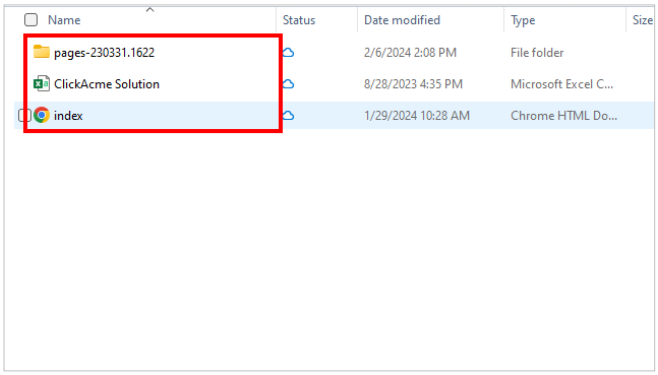
Release the left mouse button on the input field **Name**.



Confirm that you have the following items after extracting your files and adding the .csv file to the extracted folder.

- A folder named "pages."
- The .csv file.
- An HTML file named "index."

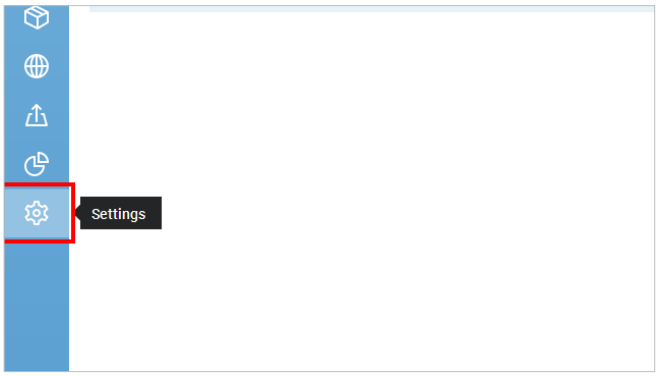
Once you have verified that all these items are present, you can proceed to the next step to import the Scope Tool into ClickLearn.



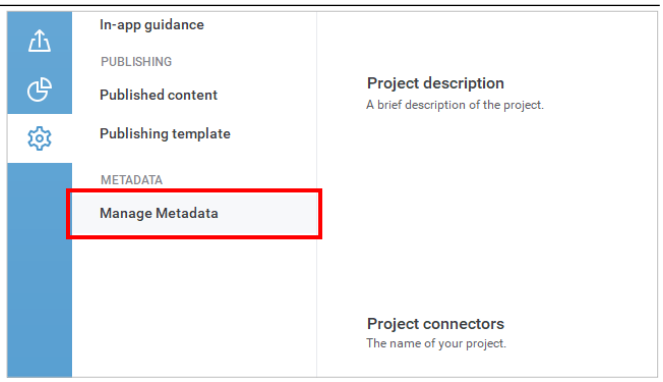
38.4.2.1. Enable Metadata in Your Project

Enabling metadata in your project is recommended. The IFS Scope Tool will use an abbreviated process name, such as 6.4.1, as the default name for recordings. By enabling metadata, you can view the alternate title of your recording, which is also imported.

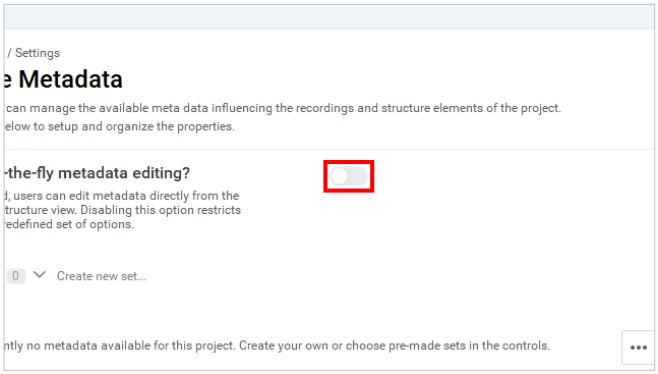
Click on the **Settings** button.



Click on the button **Manage Metadata**.

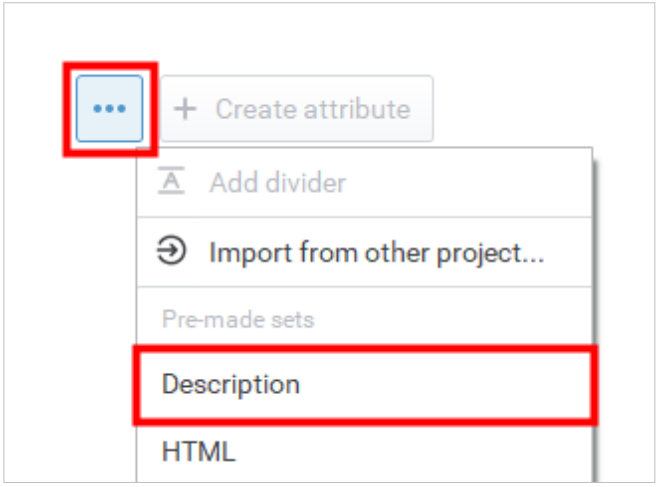


Click on the toggle to enable on-the-fly metadata editing.



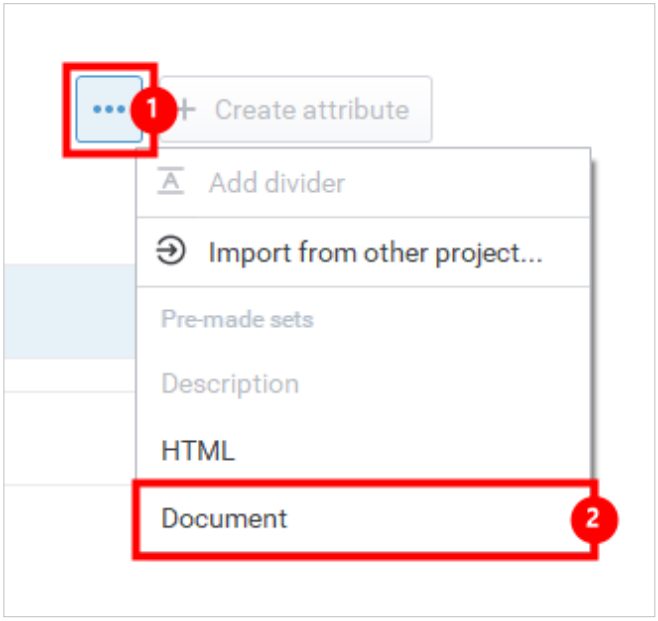
Description

Click on the icon **Metadata more**.
Click on the menu item **Description**.

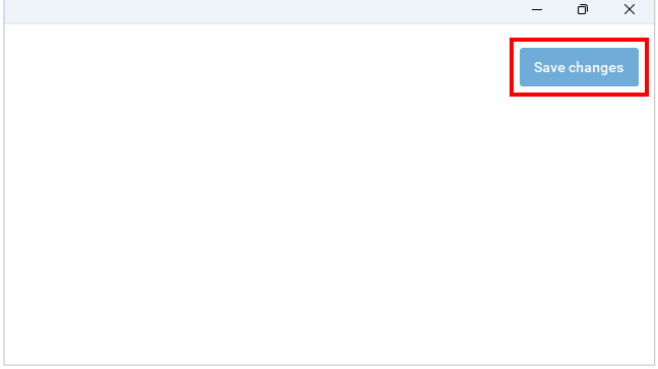


Document

1. Click on the icon **Metadata more**.
2. Click on the menu item **Document**.



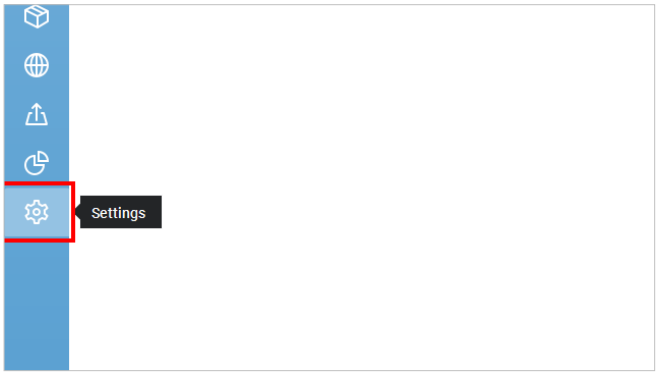
Click on the button **Save changes**.



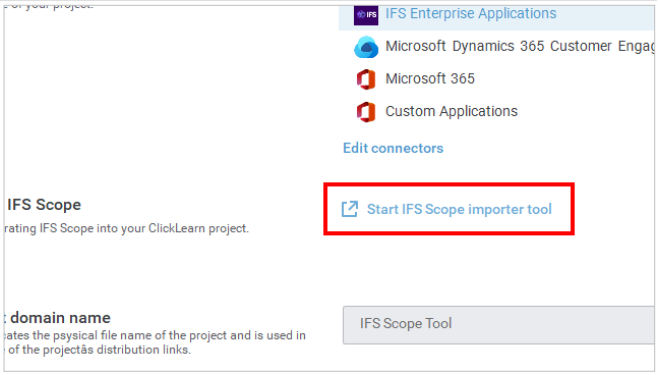
38.4.2.1.1. Import the files

Import the Scope Tool after creating your project to import the files. During project setup, ensure you designate IFS as your primary connector. When prompted to import the Scope Tool, choose "Skip Importing IFS Scope Tool." After completing these steps, follow the subsequent instructions.

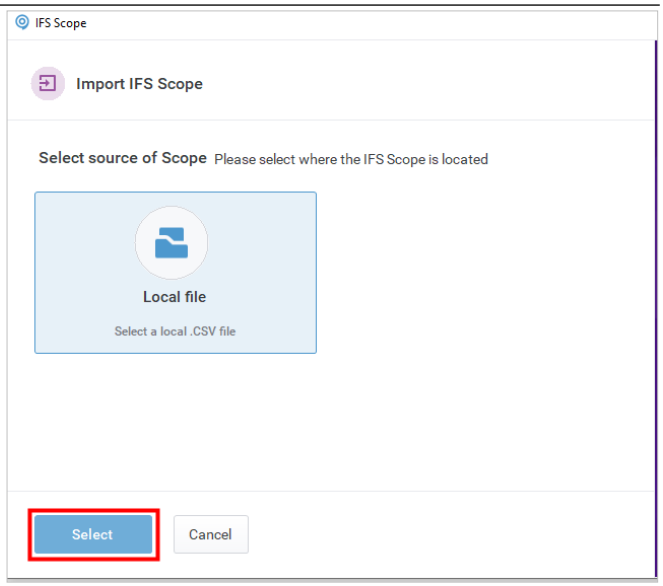
Click on the **Settings** button.



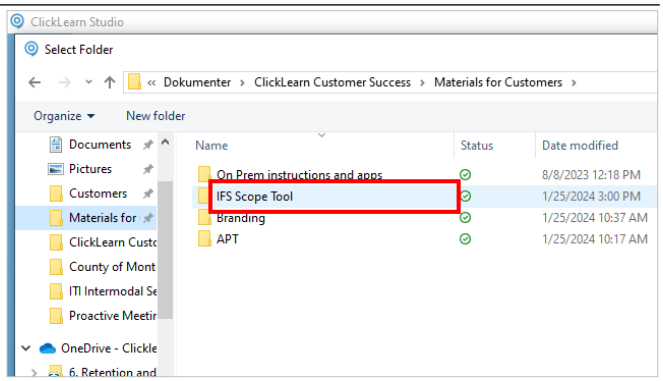
From the Project Settings page, click on the button: **Start IFS Scope importer tool**.



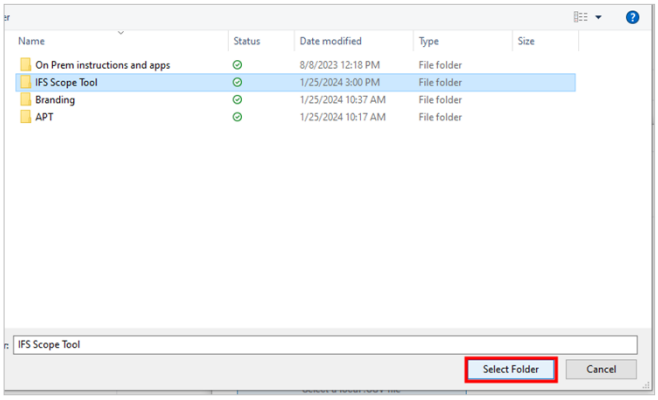
Click on the button **Select**.



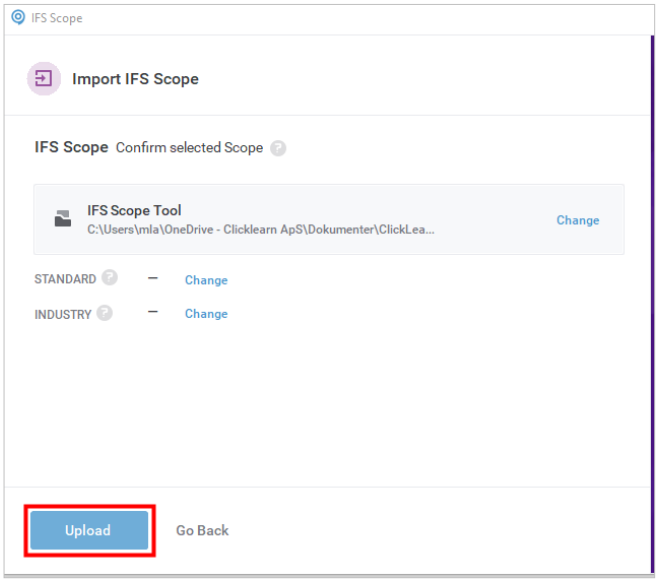
Select the folder by clicking on the input field **Name**.



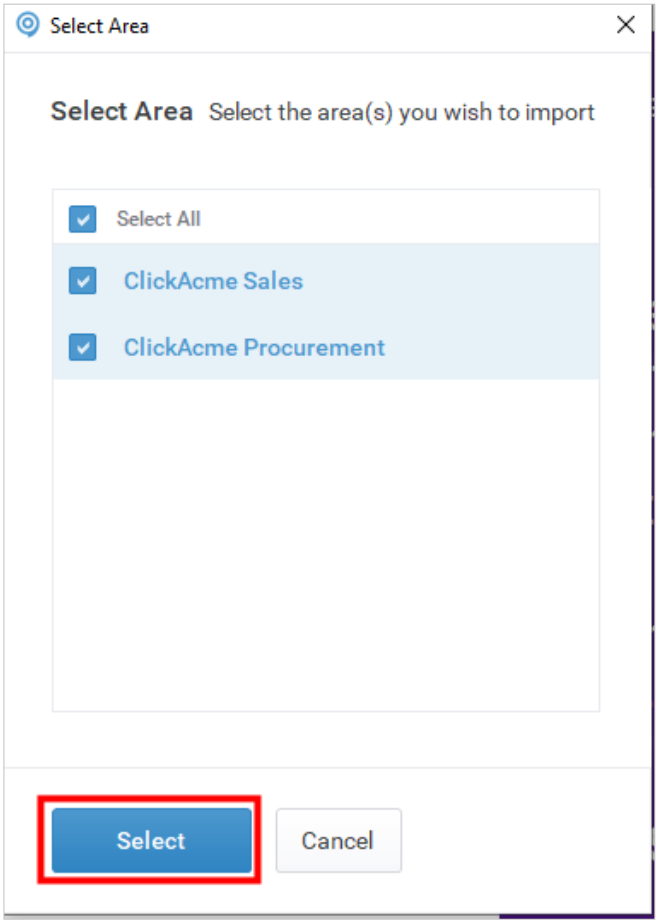
1. Click on the button **Select Folder**.



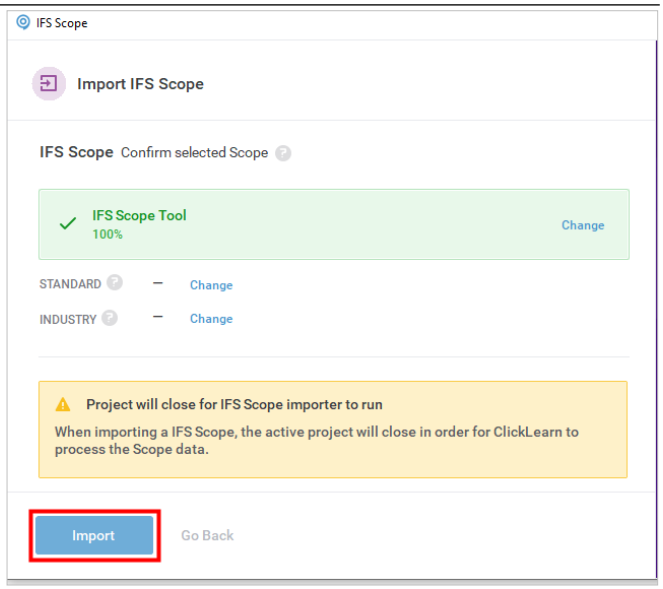
Click on the button **Upload**.



Click on the button **Select**.

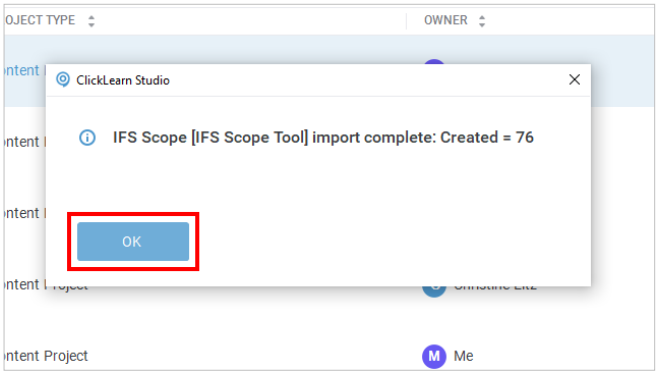


Click on the button **Import**.



Importing the Scope Tool may take some time. Please be patient and keep ClickLearn open during the process. You will be notified when the import is complete.

At this step, please select the folder in which you extracted your materials. You will not need to choose a specific file, as ClickLearn will bring everything in from that folder.
Click on the button **OK**.



Congratulations! You have successfully imported the Scope Tool. In your recordings, you will notice folders containing recordings. These recordings are templates with outlines of what needs to be captured. You will need to then update these recordings by recording the steps. If you have any questions, please contact your Customer Success Manager.

39. Frequently Asked Questions

Find fast answers to common questions, so you can solve issues yourself and keep moving.

39.1. Getting Started with ClickLearn Attain

39.1.1. Installation

39.1.1.1. How Do I Download ClickLearn Attain?

When you get a ClickLearn Attain license, you receive an email from ClickLearn providing you with a download link for ClickLearn Attain and your Attain credentials. You can also download the ClickOnce installation of ClickLearn Attain from here. If you are still unable to access it, contact your administrator or ClickLearn support.

39.1.1.2. What are the System Requirements for Installing ClickLearn Attain?

System Requirements for Installing ClickLearn Attain

- **Operating System**: Windows 11 or above
- **Dependent Software**: .NET Framework 4.8+, Microsoft Edge
- **Hardware**: Minimum 10GB HDD, Dual-core CPU (4-core recommended), Mouse & Keyboard
- **RAM**: Minimum 16GB
- **Network**: Whitelist region-specific URLs based on your application-hosted region. Replace [ORG NAME] with your organization name.

For detailed URL lists per region (EU, US, AU, CA), refer to ClickLearn's official documentation.

39.1.1.3. How do I Install ClickLearn Attain on Mac?

ClickLearn Studio runs on Windows, but Mac users can also access it by setting up a Windows virtual machine and recording within that environment.

39.1.1.4. How to install ClickLearn using an executable file?

No, you cannot install ClickLearn Attain using an executable file. There are only two installation methods available: ClickLearn Once and MSI Installation.

39.1.1.5. Can I Install ClickLearn Attain on a virtual machine?

Yes, ClickLearn Attain can be installed on a Windows virtual machine. Ensure the VM meets the system requirements, including Windows 7 or later, .NET Framework 4.8+, Microsoft Edge, and at least 16GB RAM for optimal performance.

39.1.1.6. What should I do if I find an error during Installation?

Check if your display scaling is set to 100%, close unnecessary applications, and ensure your system meets minimum requirements. Verify you're using the latest ClickLearn version and sign in with your ClickLearn credentials. If you are still facing an issue, go to the ClickLearn community and raise a query or contact ClickLearn support.

39.1.1.7. How can I check if ClickLearn Attain is Installed correctly?

Open ClickLearn Studio and sign in with your credentials. **Go to profile icon**→ check for updates to verify the installed version. Ensure all required dependencies (.NET Framework 4.8+ and Microsoft Edge) are installed. If you face issues, restart your system or reinstall ClickLearn.

39.1.1.8. What is the recommended version of ClickLearn Attain for Installation?

The latest recommended version of ClickLearn Attain is 12.1.45.0 (***as of now on 10th March 2025***). Always install the newest release to ensure optimal performance, security, and feature updates. Check **Get Help** → **What's new** in ClickLearn or visit the official portal for updates.

39.1.1.9. Can I Install ClickLearn Attain on multiple machines using the same license?

No, ClickLearn Attain licenses are typically per user. You cannot install and use the same license on multiple machines unless permitted by ClickLearn's licensing terms. Check with ClickLearn support for specific licensing details.

39.1.1.10. How to know which version of ClickLearn Studio I am using?

To check your ClickLearn Studio version, open ClickLearn Studio and go to **Get Help> What's New**. The version number will be displayed there.

39.1.1.11. What is the Administrative portal, and how do I access it?

The ClickLearn Administrative Portal enables you to manage key aspects of your ClickLearn environment, including published projects, file recovery, and ClickLearn Studio downloads. With administrative rights, you can also create, block, and delete users and projects.

To access the portal, open your web browser and use the following URL structure, replacing yourorganization with your actual organization name:

- AU: https://yourorganization.portal.au.clicklearn.com
- CA: https://yourorganization.portal.ca.clicklearn.com
- EU: https://yourorganization.portal.eu.clicklearn.com
- US: https://yourorganization.portal.us.clicklearn.com

Alternatively, you can access the Administrative Portal within ClickLearn by clicking on your profile and selecting Administrative Portal.

39.1.1.12. Is it possible to add more authors to my license than is currently allowed?

Yes, you can add multiple Authors to your license. If you need access for additional authors beyond your

current limit, please email engage@clicklearn.com, and we will process your request as soon as possible.

39.1.1.13. What is my organisation name and where can I find it?

Your organisation name is a unique identifier required to access ClickLearn Studio. It is typically a single word without spaces and can be found in your license email. Additionally, you can locate it in the URL of your organisation's ClickLearn portal, formatted as https://organisationname.portal.us.clicklearn.com.

39.1.1.14. Is there a resource platform available for Initial assistance?

Yes, ClickLearn offers a resource platform for initial assistance. You can explore the ClickLearn Documentation for detailed learning materials, engage in the ClickLearn Community to find answers and share knowledge, and use ClickLearn Universe to enhance your skills and earn certifications.

39.1.2. Download

39.1.2.1. Can I download ClickLearn Attain on a mobile device?

No, ClickLearn Attain can not be downloaded on mobile devices. It is intended for use on Window-based desktops and laptops. However, you can access content created with ClickLearn Attain on a mobile device through a web browser.

39.1.2.2. What should I do if my download of ClickLearn Attain is Interrupted?

If download is interrupted, we recommend you to check your Internet connection and ensure it is stable. Also, restart the download from the ClickLearn website or portal. If still there's an issue, clear your browser cache and try downloading again. Contact ClickLearn Support if the issue continues.

39.1.2.3. How do I download the necessary extensions for ClickLearn Attain in Google Chrome/ Microsoft Edge?

To download and install the ClickLearn Attain extension:

- Open Google Chrome or Microsoft Edge.
- Go to the Chrome Web Store or Microsoft Edge Add-ons.
- Search for ClickLearn Attain.
- Click Add to Chrome or Get to Edge.

Follow the on-screen instructions to complete the installation.

39.1.2.4. Can I download and install ClickLearn Attain on a cloud server?

Yes, you can install ClickLearn Attain on a cloud server. However, you must ensure that the server meets the system requirements and allows the necessary permissions for installation and operation. Contact ClickLearn support team if you need more help.

39.1.3. Sign In & Account Setup

39.1.3.1. How can I get access to ClickLearn Studio?

You can access ClickLearn Studio through:

- ClickOnce Installation – This version automatically updates to the latest release when available.
- MSI Package – You can manually download and install the latest MSI version from the ClickLearn portal under the **Releases** section.

39.1.3.2. What is the purpose of the unique organization name in the login process?

The Organization field represents a unique CNAME that identifies your organization and retrieves your license key from the cloud for all users.

Beyond licensing, it also defines the name of your portal, forming part of your portal's web address — for example: https://www.**xyz**.portal.us.clicklearn.com

39.1.3.3. Where can I find my unique organization name to log in?

You can find your unique organization name in:

- The welcome email from ClickLearn Support.
- Your ClickLearn administrator can also provide it.

39.1.3.4. Can I use a different organization name to sign in?

No, you must use the correct unique organization name assigned to your company to log in successfully.

39.1.3.5. What should I do if I don't know my unique organization name?

If you don't know your unique organization name:

- Check your welcome email from ClickLearn Support.
- Contact your ClickLearn administrator or support team for assistance.

39.1.3.6. How do I know if I'm logged in successfully to ClickLearn Attain?

You are logged in successfully when:

- The ClickLearn Attain interface opens without errors.
- Your user profile and organization details are visible under your profile avatar.

39.1.3.7. How do I sign in to ClickLearn Attain with my Office 365 account?

- Contact ClickLearn Support to enable Office login for your company.
- Forward the link from ClickLearn to your Azure administrator for approval.
- The Azure administrator will:

- Accept the permissions request from Azure AD.
- Grant consent for user profiles (including name, email, and organization).

- After approval, enter your CNAME and select Sign in with Office 365.
- If successful, you will be logged into ClickLearn Attain using Single Sign-On (SSO).

39.1.4. Recording

39.1.5. What's the best screen setup for smooth recordings?

For an optimal experience with ClickLearn Attain, it is advisable to adjust your display scaling to 100% and set your screen resolution to 1920 x 1080. Using a different resolution or recording in 4 K with scaling at 100% may make it challenging to capture the elements accurately.

39.1.5.1. Why do I need the 100% scale in the Windows display settings?

It is important to have 100% scaling in the Windows display settings; otherwise, Replay may fail. Also, if you

don't adjust the display scaling to 100%, you can't record properly. So, make sure scaling and resolution settings are met.

39.1.5.2. How do I add or import recordings?

To add or import recordings, simply go to the Recordings tab. You can import from My Computer, ClickLearn Cloud Storage, or another project. Alternatively, click the **New button** to start a new recording or create a folder to organize your content.

39.1.5.3. How do I stop the recording?

To stop the recording, press both control keys. If your keyboard has only one control key, hold the left Ctrl and Shift keys, then move your cursor to the top left corner. When the recording pane appears, click the stop button to end the recording.

39.1.5.4. Can I record with multiple screens?

No, you can't record with multiple screens, as ClickLearn will grey out the inactive screen.

39.1.5.5. What does the automatic recording feature do?

Automatic recording lets you record your actions continuously until you stop the recording.

39.1.5.6. What is the difference between automatic recording and single-step recording?

- **Automatic Recording**: This feature allows you to record your actions continuously until you manually stop the recording. It captures each action as you go, making it ideal for recording a sequence of tasks without interruptions.
- **Single-step Recording**: This feature allows you to record one action at a time. After performing a step, you can manually choose to record the next one. This option is useful when you want to capture specific steps without recording everything in the process.

39.1.5.7. What is the purpose of the pause button during recording?

The pause button lets you temporarily stop the recording. It’s useful if you need to adjust your screen, clear notifications, or take a break without interrupting your entire recording process. You can resume the recording when you're ready by pressing the record button again.

39.1.5.8. How do I take an annotated screenshot during the recording?

To take an annotated screenshot during the recording, click on the Annotated Screenshot button in the recorder interface. Move your cursor to the area you wish to capture and take the screenshot. You can then add annotations, such as text or drawings, to highlight or explain specific parts of the screenshot. This annotated screenshot will be saved as part of your recording process.

39.1.5.9. Why should I close all extra applications before starting my recording with ClickLearn Attain?

Closing extra applications helps to ensure that only the relevant application is recorded, providing a clean and focused capture of your process. It also reduces the chances of distractions or interruptions during the recording process.

39.1.5.10. How do I ensure that I select the right UI language for my

ClickLearn Attain recording?

When starting a new recording, you can choose the UI language in the UI Language field. Make sure to select the language that fits your project's requirements to ensure that the generated output reflects the correct interface language.

39.1.5.11. Why should I wait for the green rectangle to appear before clicking on elements during a recording?

The green rectangle indicates that ClickLearn has successfully detected the UI element, ensuring that it will be recorded accurately. Clicking before the green rectangle appears may result in the element not being recorded at all.

39.1.5.12. Why doesn't the green box appear even though the recording has started?

If the green rectangle is not appearing, it could be due to an issue with the recorder detecting the UI elements. Make sure the application or web page you're recording is active, and ensure no overlays or popups are blocking the UI elements. Refreshing the page or restarting the recording may resolve the issue.

39.1.5.13. Which extension do I need to record through Microsoft Edge?

To record through Microsoft Edge, you need to install the ClickLearn Connector. This extension allows you to capture and document your processes directly in Edge.

39.1.5.14. Which extension do I need to record through Google Chrome?

You need to install the ClickLearn Connector extension for Chrome. This extension enables the recording of actions and steps within Chrome.

39.1.5.15. I'm unable to start recording. What should I do?

If you are unable to start a recording, ensure that the ClickLearn Attain recorder is properly installed and activated. Try restarting your browser, checking for any updates to the recorder or extensions, and ensuring that your browser is compatible. If the issue persists, check your system settings or contact support.

39.1.5.16. I accidentally deleted my files. How do I get them back?

If you accidentally deleted a recording in ClickLearn Attain, you can recover it by going to the ClickLearn Administrative portal, navigating to the original project folder, clicking the vertical ellipsis (menu), and selecting Recover lost files. After the recording is restored, download the .clrx file and drag it back into ClickLearn Attain to import it. Your deleted file will be restored and ready to use.

39.1.5.17. Within how many days can I restore a deleted recording?

Typically, you can restore a deleted recording within **90 days**. After that, the recording might be permanently deleted. It’s best to restore it as soon as possible if you need it back.

39.1.5.18. How do I add users who can create recordings?

To add users who can create recordings, go to the user management section of ClickLearn Attain and assign the appropriate roles or permissions to users. Ensure they have the necessary access rights to start and manage recordings.

39.1.5.19. What are the best practices for recording?

Here are the best practices for recording with ClickLearn Attain:

- **Environment Setup**: Close all extra applications to avoid unnecessary distractions or recordings.
- **Selecting UI Language**: Always choose the correct UI language before starting the recording to ensure the output is accurate.
- **Recording Mode**: Decide between automatic or single-step recording depending on your needs.
- **Wait for Green Rectangle**: Ensure the green rectangle appears before interacting with elements on the screen to guarantee accurate recording.
- **Stop Recording Properly**: Use the correct method to stop recording to ensure all steps are captured accurately.

39.1.6. Text Block

39.1.6.1. What is a Text Block?

A Text Block is a content element within ClickLearn Attain that allows you to add text to your recording. It can be used in various formats to display instructions, explanations, or other textual content in your documentation.

39.1.6.2. How can I add a new text block to my recording in ClickLearn Attain?

To add a new text block, click the Add New Text Block option within your recording. A dialog box will appear, where you can select the type of text block and how you want it to be displayed.

39.1.6.3. What are the different display options for a Text Block?

There are several display options for a Text Block:

- **Block (outside)**: Starts on a new line and covers the entire width.
- **Inline-previous (keep with previous)**: Attaches the content block to the previous element in the instruction.
- **Inline-next (keep with next)**: Attaches the content block to the next element in the instruction.
- **Side-by-side**: Places the text to the left of an image.
- **Text above image**: Places the text above an image.
- **Side-by-side reversed**: Places the text to the right of an image.
- **Image above text**: Places the image above the text.

39.1.6.4. Can I format the text or add hyperlinks to a text block in ClickLearn Attain?

Yes, you can format the text and add hyperlinks within the Text Block. Basic text formatting features, such as bold, italics, and underline, are available. Hyperlinks can also be inserted to guide users to external resources.

39.1.6.5. How can I add a Word or PDF asset to a Text Block?

You can add Word or PDF assets to a Text Block by using the Asset feature in the editor. You can either upload the asset directly or select it from your project's existing assets. This will allow you to embed the document within your text block for easy reference.

39.1.6.6. How can I control whether a text block is included in the written documentation?

In the Text Block options, you can select whether the text block is included or excluded from the written documentation. This can be managed under the Inclusion setting, which allows you to control whether a particular step or content block should be shown in the final output.

39.1.6.7. Can I adjust the layout of the text or image blocks directly

within the editor?

Yes, you can adjust the layout of text and image blocks directly within the editor. You can choose different arrangements, such as side-by-side or above/below, depending on how you want the elements to be displayed in your final documentation.

39.1.6.8. How can I change the generated instruction text?

To change the generated instruction text, you can right-click on the step and select the "Edit" option. This opens a dialog where you can modify the text, adjust the display settings, and apply any other necessary changes.

39.1.6.9. How to show in written format and virtual assist to choose any data?

To show content in both written format and via virtual assist (interactive guidance), you can create instructions that include both the textual description in the documentation and an interactive sequence that will guide users through each step when the virtual assist is activated. This enables users to switch between traditional documentation and an interactive experience.

39.1.7. Video Editor

39.1.7.1. How do I turn the audio on or off in the video editor?

To turn the audio on or off, simply click the Audio button in the editor. If you want to disable audio preview while editing, use the Audio preview on button — it'll stop playing the audio in the preview but won't affect the final output.

39.1.7.2. How can I enable or disable subtitles in my video?

You can toggle subtitles on or off using the Turn off subtitles option. Subtitles are generated automatically from the step text, so if you've added step text, it'll show up as subtitles unless you turn them off.

39.1.7.3. What is the Mouse Action feature in the video editor?

The Mouse Action feature lets you modify the type of mouse click used in the recording — left-click, right-click, double-click, or move. Just open the Mouse Action dropdown, select the click type you want, and you're good to go. Keep in mind that you can't set mouse actions inside a section.

39.1.7.4. How can I add a new content block in the video editor?

Right-click on the step where you want to add the block, then select Add new content block. Once it's added, open the Text Editor to add your content. You can also include subtitles or narration for that block if needed.

39.1.7.5. Can I add subtitles and narration to my video in the editor?

Yes, you can add both subtitles and narration. Subtitles are pulled from the step text, and for narration, you can either upload a recorded file or record directly using your microphone. You can even use an AI Avatar to generate narration if you prefer.

39.1.7.6. How do I use an AI Avatar for narration in my video?

To use an AI Avatar, head to the Narration options tab. Select AI Avatar, enter the text you want narrated, and the avatar will handle the rest. You can adjust the voice settings if you need to tweak the tone.

39.1.7.7. How do I insert and resize images in the video editor?

Go to the Image Selector and pick an image from your project or upload one from your device. After that, you can resize it directly within the editor — just drag the corners to adjust the size and position.

39.1.7.8. Can I change the background color of an image?

Yes, you can. Open the Image Selector, then use the Color Picker to choose a background color. If the image doesn't fill the entire frame, the selected color will show up as the background.

39.1.7.9. How can I add a delay before a step is played in the video?

If you need to add a delay, go to the Timing options tab and enable Pause before. Set the delay time (in seconds) and the editor will hold the step for that long before it starts playing.

39.1.7.10. Can I edit the narration voice in the video editor?

Yes, you can modify the narrator's voice in the Narration options tab. Open Settings > Edit, and you can either select a different voice or upload a custom audio file. If you want to keep the new voice for future projects, just set it as the default.

39.1.7.11. How do I play or pause the video in the editor?

Easy — just hit the Play/Pause button at the bottom of the editor.

39.1.7.12. How do I enable or disable the audio preview?

If you want to stop hearing audio while editing, click the Audio preview on button to turn it off. You'll still hear it in the final export unless you disable audio altogether.

39.1.7.13. Can I turn off the video preview while editing?

Yes, you can. Just click the Turn preview off button, and the preview will stop showing while you work.

39.1.8. Assist Editor

39.1.8.1. What is the purpose of the Assist Editor in ClickLearn Attain?

The Assist Editor in ClickLearn Attain allows you to customize the content and behavior of the assist experience for your recordings. You can fine-tune each step, adjust how users advance through the steps, and modify settings to ensure a smooth and effective user experience.

39.1.8.2. How can I select a step to edit in the Assist Editor?

To select a step, just open the Assist Editor and click on the step you want to modify. From there, you'll see two options — Edit and Delete — allowing you to make changes or remove the step as needed.

39.1.8.3. How can I delete a step from my recording in the Assist Editor?

If you need to remove a step, simply click on the Delete icon next to the step you want to remove. This will permanently delete the step from the assist experience, so double-check before confirming the deletion.

39.1.8.4. How can I edit a step in the Assist Editor?

To edit a step, click on the Edit icon next to the step. A new dialog box will open, where you can modify the step

content and settings. You can adjust how the step behaves, change the advance method, or even lock the step if needed.

39.1.8.5. What is the full editing option in the Assist Editor?

The Full editing option allows you to access all customization settings for a step. After clicking on the Edit icon, select Full editing from the dropdown. This will give you control over the advance settings (like auto-completion or requiring a click), narration, and other advanced options.

39.1.8.6. Can I include or exclude a step from the assist experience? How?

Yes, you can. In the Edit dialog box, you'll see an Inclusion option. Toggle it to either include or exclude the step from the assist experience. If you exclude it, the step won't appear in the assist playback.

39.1.9. Flow Editor

39.1.9.1. What is the Flow Editor in ClickLearn Attain?

The Flow Editor in ClickLearn Attain allows you to add questions to your recordings that guide users to specific steps based on their responses. This makes the assist experience more interactive and dynamic by allowing you to define conditions and set up advanced flow connections.

39.1.9.2. How can I select a step to edit in the Flow Editor?

To edit a step, open the Flow Editor and click on the Edit icon next to the step you want to modify. You'll be able to adjust the step's content, define conditions, and modify its flow behavior from the edit dialog box. If needed, you can also delete the step from this menu.

39.1.9.3. What is the Full editing option in the Flow Editor?

The Full editing option gives you complete control over the selected step's settings. After clicking the Edit icon, choose Full editing from the dropdown menu. This allows you to define conditions, set up flow behavior, and fine-tune how the step advances or interacts with other steps.

39.1.9.4. How can I add a question to my recording in the Flow Editor?

To add a question, select the step where you want to place it and click the Add new question button. Enter the question in the Question name field and define the available answers under the Question answer section. You can also set up conditions and connectivity to control how the flow will adapt based on the user's response.

39.1.9.5. Where can I place my question within the recording?

You have three options for question placement in the Flow Editor:

- **Before the selected step** – The question appears right before the chosen step.
- **At the beginning of the current section** – The question will be positioned at the start of the section.
- **At the beginning of the recording** – The question will appear at the very start of the recording.

39.1.9.6. What question types can I choose from in the Flow Editor?

You can select from three types of questions in the Flow Editor:

- **Yes/No** – A simple binary question with two possible answers.
- **Single selection** – The user can select one option from a predefined list.
- **Multiple selection** – The user can select more than one option from the list.

39.1.9.7. In which content type can I see the flow?

You can view the flow in simulated recordings. After setting up the flow, you can simulate it by expanding the question and selecting the answers. The green icons will show the included steps, while the red icons will highlight the excluded steps. This helps you visually confirm the flow behaviour before publishing.

39.1.10. Data Editor

39.1.10.1. What is the purpose of the Data Editor in ClickLearn Attain?

The Data Editor in ClickLearn Attain allows you to edit the data values captured in your recordings. This includes text inputs, drop-down selections, checkboxes, and more. It provides a clear list of all data fields, making it easy to modify or replace data, add delays, and adjust inputs directly from the editor.

39.1.10.2. Can I add a delay to the steps in the Data Editor?

Yes, you can add a delay in the Data Editor. After selecting the step you want to modify, click on Edit and set the delay time in seconds. This is particularly useful when working with systems that have slower response times, as it ensures the data is captured correctly.

39.1.10.3. What does the Keyboard Input option do in the Data Editor?

The Keyboard Input option allows you to edit the text captured from keyboard inputs in the recording. When you select a step and open the edit dialog, you can modify or replace the text inputted using the keyboard. This helps you refine and correct user input data in the recording.

39.1.10.4. How can I identify which steps have data values in the Data Editor?

You can identify steps with data values by checking the Replay Data column in the Data Editor. Steps with data values will be listed there. Additionally, you can use the Filter option to hide steps with no data or only display steps with modified data.

39.1.10.5. What is Click Location?

Click Location refers to the point where the user interaction (such as a mouse click) was recorded in the step. This helps you identify and adjust the exact position where the interaction occurred, ensuring the recording accurately reflects the user's actions.

39.1.11. Replay

39.1.11.1. What is the Replay feature in ClickLearn Attain?

The Replay feature in ClickLearn Attain allows you to update your business documentation by automatically re-recording business processes. When your systems change or get upgraded, Replay helps keep your documentation aligned with the updated processes. Essentially, Replay ensures that your previously recorded steps are up-to-date with the most recent version of your application.

39.1.11.2. Can I replay a recording in a different language?

Yes, you can. ClickLearn Attain allows you to replay a recording in different languages. For example, if a recording was originally made in English, you can replay it in another language such as Afrikaans (or any other language included in your project).

Steps to Replay in a Different Language:

- Select the recording you want to replay.
- Right-click the grid view cell with the data (e.g., "Create a new contact").
- Click Replay.

- Click Change to open the language options.
- Select your desired language and click Confirm.
- Click Next and start the replay.

39.1.11.3. Why is my replay failing immediately after starting?

One common reason for an immediate replay failure is when the required application is not started before attempting to replay.

How to fix: Ensure that you start the application used for the original recording before initiating the replay. If the application is not running, the replay will fail because ClickLearn Attain cannot locate the necessary elements on the screen.

39.1.11.4. Why is my replay failing when there is no data in the recording?

Replay failures often occur when the application data has changed since the original recording. If the data expected by the recording is no longer available (e.g., a different screen is open or the data has been deleted), the replay cannot proceed.

How to fix:

- Check if the data is still available in the application.
- Retry the recording if necessary, or use the Record and Replace option to capture the missing data.

39.1.11.5. Why is my replay failing because of changes made to the recording?

Replay can fail if changes were made to the recording or if steps have been excluded or altered in a way that makes them unrecognizable by the system.

How to fix:

- Re-record the steps that are causing the failure.
- If needed, use the Exclude option to avoid specific steps or modify the recording to align with the new system changes.

39.1.11.6. What are the best practices for using Replay?

Here are some best practices for a successful Replay:

- **Start the Application First**: Ensure that the same application used for the original recording is running before attempting a replay.
- **Monitor Data Availability**: Make sure the data you recorded is still present in the application; otherwise, the replay will fail.
- **Avoid Unnecessary Changes**: If changes have been made to the application or the recorded steps, make the necessary updates to the recording rather than relying on the old one.
- **Use Retry**: If a specific step fails, use the Retry button to attempt the action again.
- **Exclude Unnecessary Steps:** If a particular step is no longer required for the process, exclude it from the replay to ensure a smooth process.
- **Stay Updated**: Always ensure that your ClickLearn Attain version is up-to-date to avoid bugs or compatibility issues.

39.1.12. Summarization

39.1.12.1. What is Summarization?

Summarization is the process of creating a concise overview of a recording, allowing users to understand the main points without going through every individual step. This is especially useful for lengthy recordings (e.g., over 200 steps), providing a general idea of the content.

39.1.12.2. How do I start creating a summarization for a recording?

To create a **summarization**:

- Open the recording you want to summarize.
- Double-click the grid view cell with the data (e.g., "Create a Lead").
- Hold the Shift key and select the steps you want to include, starting from the Objective.
- Click the Summarization button, which opens a window where you can configure your summary.

39.1.12.3. Can I set a character limit for the summary?

Yes, you can set a character limit for the summary. In the Max Length dropdown, you can specify a maximum character count for the summary, such as a limit of 500 characters, to ensure the summary meets your platform's or needs' requirements.

39.1.12.4. What is the temperature setting in the summarization process?

The temperature setting controls the level of creativity in the AI's responses. It affects how detailed or creative the summary will be. The available options are:

- **More Precise**: High accuracy and detail.
- **Precise**: Balanced accuracy and detail.
- **Balanced**: A mix of precision and creativity.
- **Creative**: More inventive responses.
- **More Creative**: Highly creative responses.

You can adjust the temperature to align with your project's needs. For instance, if you want a highly accurate summary, you may choose More Precise.

39.1.12.5. Can I retry the summarization if I’m not happy with the result?

Yes, if you're not satisfied with the initial summary, you can use the Retry option to generate a new one. Additionally, you can adjust the format, character limit, or temperature settings and try again until you achieve the desired result.

Once satisfied, click Save Changes to finalize the summary.

39.1.13. Custom audio

39.1.13.1. How do I add custom audio to a recording?

To add custom audio, open the recording, go to the Video editor tab, select the step you want, click Edit, then choose Narration options. You can either upload an audio file or record narration using your microphone.

39.1.13.2. Can I record my voice directly into the recording?

Yes, you can. Click Record narration using your microphone, start recording by clicking the microphone icon, and stop when finished. Playback to review and click Save changes once satisfied.

39.1.13.3. Can I upload multiple audio files to different steps in a recording?

Yes, you can upload different audio files to each step in the recording. Select each step individually and upload or record the appropriate audio for that step.

39.1.13.4. Can I edit the audio after uploading or recording it?

You cannot directly edit the audio. If needed, you can re-upload or re-record the audio for any step in the

recording.

39.1.13.5. Are there any limitations on the type of audio file I can upload?

ClickLearn Attain generally supports MP3 and WAV file formats. For specific formats or limitations, refer to the documentation.

39.1.13.6. Is there any way to preview the audio before finalizing it?

Yes, you can preview the audio by clicking the Play button after uploading or recording. If you are not satisfied, you can re-record or upload another file before saving it.

39.1.14. Structure and Segments

39.1.14.1. How do I organise the structure of my learning portal?

Organising the structure of your learning portal involves carefully arranging your content using sections, headings, and recordings. You can organise these elements by dragging and dropping them into the desired order on the structure screen. By categorising your content into relevant sections, you can create an intuitive and user-friendly learning experience.

39.1.14.2. What is the purpose of a section, and how do I add one to the structure?

A section is essential for grouping and organising content into manageable blocks. Sections allow you to categorise different types of recordings, headings, or other resources. To add a section, simply drag and drop the section component from the right-side pane to your structure in the centre of the application.

39.1.14.3. How do I customise the icons and colours for components in my portal structure?

You can customise the icons and colours of the components within your portal by accessing the common properties of each element. You have the option to either automatically assign an icon, select one from a gallery, or upload a custom icon. For colours, you can choose the exact colour to match your branding or preferences.

39.1.14.4. What are the available types of dividers, and how do they impact the visual layout?

The divider feature helps you create a visual separation between content blocks. There are three types of dividers available: Solid, Dashed, and Dotted. Each type affects the visual layout by providing different styles of separation, allowing you to control how distinct or subtle the content separation appears.

39.1.14.5. What are the limitations when adding text to the structure?

The limitation of adding text to your structure is that you can only add up to 300 characters per text element. If you need to format the text or add more content, click the expand button to adjust the text formatting and make edits as necessary.

39.1.14.6. How can I import and export segmentation data from an Excel file?

To import or export segmentation data from an Excel file, use the Import and Export Segmentation features in the "Structure" menu. The process allows you to move your segmentation data between projects easily. For exporting, select the project, and the segmentation details will be saved in an Excel file. For importing, make edits in the Excel file and upload it back into the system for updates.

39.1.14.7. What types of publishing templates are available, and how do I create a custom one?

The available publishing templates include the default project template and any custom templates you create. To create a custom template, click the "Create a new template" option and design it based on your needs. This allows you to modify your portal content's visual appearance and structure to suit various projects or branding requirements.

39.1.14.8. What is the significance of the Language-independent URL part in structuring content?

The **Language-independent URL part** (LIUP) ensures that content can be accessed via a consistent URL, regardless of language preferences. It is particularly useful when your portal supports multiple languages. By assigning a LIUP, you create a stable URL part for content that will remain unaffected by changes in language settings, making it easier to share and access.

39.1.14.9. What is the best way to group and structure my content?

The best way to group and structure your content is by considering users' needs. Use sections to group related materials and recordings, employ headings to separate different topics or categories, and apply segmentation to target specific audiences. This creates an organised, logical flow that enhances user navigation and learning.

39.1.14.10. What are the best practices for using Structure?

Best practices for using the structure feature include:

- Plan your sections ahead of time to group related content logically.
- Use consistent naming conventions for your sections and recordings.
- Utilise the segmentation feature to create specific content variations for different user groups.
- Regularly preview the portal to ensure content is organised and visually appealing.
- Customise icons and colours to match your branding and make the portal visually cohesive.
- Keep content concise and well-organised to enhance the user experience.

39.1.15. Dashboard

39.1.15.1. What is the purpose of the Dashboard?

The Dashboard is designed to help you track and analyze data collected from your published content. It provides insights into user engagement, content consumption, and performance trends. You can monitor how users interact with your content across different locations and time zones, helping you improve training materials and user experience.

39.1.15.2. What data can I track with the Dashboard?

The Dashboard allows you to track:

- Total users and unique users
- Content adoption rate
- Engagement metrics (clicks, views, feedback)
- Most and least consumed content
- Top active users
- Trends over different time spans (week, month, quarter, year)
- User actions like play, pause, exit, feedback, and more

39.1.15.3. What is the Copy OData URL feature?

The Copy OData URL feature allows you to extract data from ClickLearn and create customized reports and dashboards in Microsoft Excel or other business intelligence tools. You can filter the data based on your project

needs and generate reports for deeper analysis.

39.1.15.4. How can I export data from the Dashboard?

You can export Dashboard data as an Excel file using the Export Data function. This allows you to analyze the data offline or share it with stakeholders.

39.1.15.5. What are the key actions tracked in the Dashboard?

The Dashboard tracks various user actions, including:

- Click: When users interact with content
- Pageview: When a user accesses a page
- Feedback: When users submit feedback
- Video Actions: Play, pause, chapter jump, continue, end
- Engagement Actions: Correct/Wrong answers in interactive sessions
- Web Assist & Windows Assist: Start, end, navigation, and user interactions

39.1.15.6. What is the User Experience Panel Dashboard?

The User Experience Panel Dashboard provides detailed insights into how users interact with ClickLearn content. It helps track usability, adoption, and effectiveness of training materials through user behavior analysis.

39.1.15.7. What can I see under Users on the Dashboard?

Under Users, you can view:

- Total users and new users
- Individual engagement levels
- Top active users
- Content consumption behavior (who is consuming content and who isn't)

39.1.15.8. What is the Content Adoption Rate?

The Content Adoption Rate measures how many users are engaging with the published content compared to the total number of users. It helps determine how well your training materials are being used.

39.1.15.9. How can I view New Users in a project?

To view New Users, you can filter the Time Span to see weekly, monthly, quarterly, or yearly trends. The Dashboard will show how many users joined within the selected period.

39.1.15.10. What does the Top Active Users section show?

The Top Active Users section highlights users who interact the most with the content. This is based on actions like clicks, views, feedback, and completion rates.

39.1.15.11. Can I track the top consumed content?

Yes, the Dashboard provides insights into top consumed content and least consumed content, helping you identify which materials are most valuable to users.

39.1.15.12. What is the significance of Recording ID and Book ID?

- Recording ID: A unique identifier for each recorded content piece.
- Book ID: A unique identifier assigned to a training book or guide.

These IDs help track and manage training materials effectively.

39.1.15.13. Why is it not showing who has opened which instruction?

If the Dashboard does not display which user has opened a specific instruction, it could be due to:

- Privacy settings restricting detailed tracking
- Lack of sufficient user authentication data
- Data refresh issues—try refreshing the Dashboard

39.1.16. Localization

39.1.16.1. What is Localization?

Localization is the process of adapting your content to different languages and cultures, ensuring a broader audience can understand and engage with it. It enhances user adoption, satisfaction, and retention of software products.

39.1.16.2. What is the primary language?

English is the default primary language when setting up a project. However, you can select another language as per your preferences.

39.1.16.3. How can I change the primary language?

To change the primary language, go to **Settings** → **Language Settings** and adjust the primary language as needed. Ensure your localization settings reflect the change before proceeding.

39.1.16.4. In what languages is ClickLearn available?

ClickLearn supports multiple languages, allowing users to translate and localize their projects as required. The available languages can be selected during the localization setup.

39.1.16.5. How do I set up languages for my project?

If your project has only one language, you can set up additional languages by:

- Clicking on Setup Languages in the Localization menu.
- Navigating to Settings → Language Settings to add more languages.

39.1.16.6. What is the Localization Dashboard?

The Localization Dashboard provides an overview of your project's translation status, including missing translations, missing replays, assigned users, and overall progress.

39.1.16.7. How can I translate my project into different languages?

You can translate your project by:

- Clicking More Options on the Localization screen.
- Selecting Start Translating for the desired language.
- Using Auto-translate for entire recordings or individual steps.
- Manually translating content through the Open in Translator Tool option.

39.1.16.8. Can I translate individual steps in my recordings?

Yes, individual steps can be translated by:

- Opening the recording.
- Selecting the specific step.
- Clicking Auto-translate single step and committing the translation.

39.1.16.9. What are the best practices for using Localization?

- Set up multiple languages at the beginning of your project.
- Regularly check the Localization Dashboard for missing elements.
- Use the Run Analyzer tool to ensure completeness.
- Leverage the Auto-translate feature for efficiency.
- Keep track of translations using Import/Export to Excel options.

39.1.17. Publishing

39.1.17.1. How do I start publishing my content with ClickLearn Attain?

To publish content, navigate to Publishing in ClickLearn Attain. First-time users must create a structure via the Create Structure button, while existing users can re-produce content with existing settings. Use the Start Guide to produce and publish step-by-step.

39.1.17.2. How can I view the details of the active version of my project?

Go to the Active Version section in ClickLearn Attain. Here, you can see the producer's name, production date, publication status, version number, available languages, tracking status, and access settings. Use the Copy Link function to share the content.

39.1.17.3. How do I publish my project after production?

After producing your content, click Publish as Active Version in the Publishing menu. Once published, copy the generated link and share it with your audience.

39.1.17.4. What are the deployment options available in ClickLearn Attain?

You can deploy content via:

- ContentCloud (hosted by ClickLearn)
- On-premise (local storage)
- SharePoint (Microsoft SharePoint integration)
- Inside CRM (CRM/CE system integration)
- Inside Business Central (Microsoft Business Central integration)

39.1.17.5. How can I configure the deployment options?

Select the Deployment menu before publishing. Depending on the chosen method, you can enable tracking, authentication, and access settings. Note that some options, like On-premise, restrict additional deployments.

39.1.17.6. What is ClickLearn Assist, and how do I use it?

ClickLearn Assist provides step-by-step on-screen guidance for recorded processes. Activate it in ClickLearn Studio via the Assist menu or from a specific step in your recording.

39.1.17.7. How do I create a SCORM package for my project?

Navigate to Publishing, select SCORM as the output format, and generate the package. The SCORM zip file can be uploaded to your Learning Management System (LMS).

39.1.17.8. Can I apply a custom font to my learning portal?

Yes. Custom fonts can be applied via Publishing Settings under Portal Customisation. Ensure your selected

font is supported in the output formats.

39.1.17.9. How do I share my published content with others?

Once published, use the Copy Link function under Active Version. The content can be accessed via a direct link, SharePoint, LMS, or embedded in business applications.

39.1.17.10. What is the setup needed for SharePoint deployment?

Install the ClickLearn SharePoint app, configure permissions, and select SharePoint as the deployment method in Publishing Settings. The content will be accessible within your organisation’s SharePoint portal.

39.1.17.11. Can I integrate ClickLearn with my LMS?

Yes, by exporting content as a SCORM package or providing a direct link. SCORM-compliant LMS platforms will automatically track progress and completion.

39.1.17.12. How will my end-users access the published content?

Users can access content via a direct URL, SharePoint, LMS, or embedded guides in their ERP/CRM system. Deployment settings determine whether access is public or restricted.

39.1.17.13. Do I need to integrate the learning portal into my business application (ERP, CRM, etc.) for end-users to access it?

No, but integration enhances usability. Without integration, users can still access the content through a direct link or SharePoint.

39.1.17.14. Do you have a guide for trainees to use the ClickLearn portal/formats/embedded help?

Yes, ClickLearn provides user guides and embedded help formats, accessible within the portal. Trainees can refer to these for step-by-step instructions.

39.1.17.15. How do I deploy a virtual assistant for all end-users?

Enable ClickLearn Assist during publishing. Once deployed, users can access interactive guides within their application via the Assist icon in the system tray.

39.1.18. Settings

39.1.18.1. What are Project Settings?

Project Settings in ClickLearn encompass various configurations that define the attributes and behaviours of your project. These settings allow you to customise aspects such as the project name, description, icon, colour scheme, language preferences, and other parameters to tailor the project to your organisation's requirements.

39.1.18.2. How can I change the project icon and colour?

To modify the project icon and colour in ClickLearn:

- Open your project and navigate to the 'Settings' section.
- Select 'Publishing Template' to access customisation options.
- Within the 'Identity' menu, you can upload your corporate logo and set the primary colour to align with your organisation's branding.
- After making the desired changes, click 'Save changes' to apply them.

This process ensures that your project's visual elements are consistent with your corporate identity.

39.1.18.3. How do I change the project name?

To rename your project:

- Access the 'Settings' section of your project.
- Locate the 'Project Name' field.
- Enter the new name for your project.
- Click 'Save changes' to update the project name.

Renaming your project helps maintain clarity and relevance as your project's scope evolves.

39.1.18.4. Is there a limit to the project description?

Yes, the project description in ClickLearn is limited to 250 characters. This allows you to provide a concise summary of your project's purpose and scope.

39.1.18.5. How do I export a project?

To export a project from ClickLearn:

- Open the project you wish to export.
- Navigate to the 'File' menu and select 'Export'.
- Choose the desired export format and destination.
- Follow the on-screen instructions to complete the export process.

Exporting projects facilitates sharing and backup of your work.

39.1.18.6. Can I import a project from ClickLearn Classic?

Yes, ClickLearn provides functionality to import projects from ClickLearn Classic. To do this:

- In ClickLearn Attain, go to the 'File' menu and select 'Import'.Choose 'Import from ClickLearn Classic'.
- Locate and select the .clwx file of the project you wish to import.

Follow the prompts to complete the import process.

This allows for a seamless transition of your existing projects into the newer platform.

39.1.18.7. What are Language Settings?

Language Settings in ClickLearn allow you to define the languages in which your content will be published. This includes setting the default language for your project and adding additional languages to cater to a diverse audience.

39.1.18.8. How can I change the publication languages?

To modify publication languages:

- Navigate to 'Settings' and select 'Language Settings'.
- In the 'Publication Languages' section, add or remove languages as needed.
- Click 'Save changes' to apply your updates.

This ensures your content is accessible to users in their preferred languages.

39.1.18.9. How do I change the UI language for my project?

To change the user interface language:

- Go to 'Settings' and select 'Language Settings'.
- Under 'UI Language', choose your preferred language from the dropdown menu.
- Click 'Save changes' to implement the change.

Adjusting the UI language enhances usability for team members working in different languages.

39.1.18.10. What are Language Templates, and how do I customise them?

Language Templates in ClickLearn define the structure and formatting of content in different languages. To customise them:

- Access 'Settings' and select 'Language Templates'.
- Choose the template you wish to modify.
- Make the necessary adjustments to align with your localisation requirements.
- Save your changes to apply them.

Customising Language Templates ensures consistency and cultural appropriateness across multilingual content.

39.1.18.11. What does Force Language Compliance do?

The 'Force Language Compliance' feature ensures that all content adheres strictly to the selected language settings, preventing the inclusion of untranslated or inconsistent language elements. Enabling this helps maintain the integrity and professionalism of your multilingual content.

39.1.18.12. How can I configure Text-to-Speech settings?

To configure Text-to-Speech (TTS) settings:

- Navigate to 'Settings' and select 'Text-to-Speech Settings'.
- Adjust parameters such as voice selection, speech rate, and volume to suit your needs.
- Save your configurations to apply them.

Proper TTS configuration enhances the accessibility and engagement of your training materials.

39.1.18.13. What is the AI Avatar, and how do I set it?

The AI Avatar in ClickLearn is a virtual presenter that can narrate your training content, adding a dynamic and engaging element to your materials. To set up the AI Avatar:

- Go to 'Settings' and select 'Text-to-Speech Settings'.
- Under the AI Avatar section, enter your Colossyan API key.

39.1.18.14. How can I change the default narrator voice?

To modify the default narrator voice in ClickLearn, navigate to the project settings and select the desired voice from the available options. This adjustment will apply to all recordings within the project. For individual recordings, you can override the default by selecting a different voice within the recording's settings. Additionally, creating separate templates with distinct voice settings allows for consistent application across specific modules.

39.1.18.15. What is the Replay feature, and how do I configure it?

The Replay feature in ClickLearn enables the automatic updating of existing recordings to reflect changes in your application's interface or workflow. To configure Replay, open the desired recording and select the 'Replay' option. Follow the prompts to guide ClickLearn through the updated process.

39.1.18.16. What are AI tokens, and how are they used?

AI tokens in ClickLearn are units that facilitate AI-driven functionalities, such as AI Chat and AI Summarization. Each AI request consumes a specific number of tokens. Users are allocated tokens based on their subscription and can monitor usage through the AI Tokens page, which provides insights into balance and transaction history.

39.1.18.17. How do I import a publishing template from another project?

To import a publishing template from another ClickLearn project, access the project settings and select the 'Import Template' option. This process allows you to incorporate templates, including associated assets, from

different projects into your current one.

39.1.18.18. What is the Synthesia and Colossyan AI Avatar integration?

ClickLearn has partnered with Synthesia and Colossyan to integrate AI avatars into training videos, enhancing user engagement. This collaboration allows for the creation of AI-generated videos featuring avatars that can narrate and present content, providing a more interactive learning experience.

39.1.18.19. How do I enable AI Avatar for my content?

To enable AI Avatars in your ClickLearn content, integrate your Colossyan account by entering the API key into ClickLearn's integration settings. Once configured, you can select AI Avatars during the publishing process to enhance your training materials.

39.1.18.20. Are changes in the template affecting existing recordings?

Modifying a publishing template in ClickLearn impacts the presentation of all recordings associated with that template. However, the underlying content of the recordings remains unchanged. To apply template changes, you need to republish the affected recordings.

39.1.19. APT

39.1.19.1. What is Automated Process Testing (APT)?

Automated Process Testing (APT) is a method that allows you to test end-to-end business processes by automating the execution of multiple interconnected tasks. This ensures that complex workflows function correctly across various scenarios.

39.1.19.2. How do I create an APT project?

To create an APT project, start by identifying the processes you want to test. Map out these processes, ensuring that each step flows logically into the next. Incorporate decision points and variables to handle different scenarios, and utilize ClickLearn's features to bind multiple test scenarios together.

39.1.19.3. What are the best practices for using APT?

Effective APT implementation involves careful planning of your test setup, ensuring that each test case is self-contained and easy to understand. Regularly update your regression test suite to reflect any changes in the software application, and collaborate with developers to align testing processes with development.

39.1.19.4. Can I ask ClickLearn to run test scripts?

Yes, ClickLearn allows you to execute test scripts using its Automated Process Testing feature. You can run these tests directly through the ClickLearn interface or utilize the APT Console terminal tool for execution. Additionally, the APT API enables tests to run without manually opening your systems, further automating the process.

39.1.20. Inside Help

39.1.20.1. What is Inside Help?

Inside Help is an integrated documentation tool that allows you to create and manage help content for fields, forms, and tables within Microsoft Dynamics. It enhances the built-in help system by incorporating custom content and ClickLearn recordings.

39.1.20.2. What kind of content can I add to Inside Help?

You can add custom help for forms, fields, and reports, integrate ClickLearn recordings, and include automatic cross-references to improve user navigation and experience.

39.1.20.3. What are the best practices for using Inside Help?

- **Define Clear Help Content**: Ensure documentation is relevant and structured.
- **Integrate ClickLearn Processes**: Enhance help content with interactive guides.
- **Maintain Up-to-Date Information**: Regularly update content to reflect system changes.
- **Use Cross-References**: Link relevant sections for seamless navigation.
- **Test Before Deployment**: Verify content accuracy within the Dynamics platform.

39.1.20.4. On what platforms is Inside Help available?

Inside Help is available for Microsoft Dynamics 365 Customer Engagement (CE) and Microsoft Dynamics 365 Business Central (BC), supporting both single-tenant and multi-tenant setups.

39.1.21. User Experience Panel (UXP)

39.1.21.1. What is UXP? How can I check if UXP/UAC is available to me?

The User Experience Panel (UXP) is an AI-driven feature within ClickLearn that provides personalized in-app guidance, AI-powered assistance, and automated onboarding to enhance user adoption and training. To determine if UXP/UAC is available to you, please contact your ClickLearn administrator or refer to your organization's ClickLearn subscription details.

39.1.21.2. What are the basic requirements to get started with UXP?

To begin using UXP, ensure you have an active ClickLearn subscription that includes the UXP feature. Additionally, verify that your target applications are supported by ClickLearn and that you have the necessary permissions to integrate UXP within those applications.

39.1.21.3. What is Tab Configuration in UXP?

Tab Configuration in UXP allows administrators to customize the tabs displayed within the User Experience Panel. This customization enables the organization and presentation of various resources, such as help content, training materials, and notifications, tailored to user roles and contexts. Proper tab configuration ensures that users have quick access to relevant information within their workflow.

39.1.21.4. What is Dynamic Asset and End JSON in UXP?

Dynamic Assets in UXP refer to resources that are generated or customized in real-time based on user interactions or specific contexts within the application. The End JSON is a configuration file that defines the structure and behavior of these dynamic assets, specifying parameters such as content sources, display conditions, and user permissions. By configuring the End JSON, administrators can control how dynamic content is presented to users within the UXP.

39.1.21.5. How can I add new context and metadata in dynamic assets?

To add new context and metadata to dynamic assets in UXP, you'll need to modify the End JSON configuration file. This involves defining new parameters that specify the context in which the asset should appear and adding metadata that describes the asset's attributes.

39.1.21.6. How do I produce and publish a UXP project?

Producing and publishing a UXP project involves creating the necessary content within ClickLearn, configuring the UXP settings, and deploying the project to your target application. This process includes recording procedures, generating learning materials, configuring the User Experience Panel, and publishing the content so that it is accessible to end-users within their workflow.

39.1.21.7. What is ClickLearn Alfred?

ClickLearn Alfred is an AI-powered virtual assistant integrated within the User Experience Panel. It provides users with real-time, contextual assistance by answering queries, guiding through processes, and offering relevant resources directly within the application. Alfred enhances user productivity by delivering immediate support and reducing the need for external help resources.

39.1.21.8. How do I add notifications in UXP?

To add notifications in UXP, access the ClickLearn authoring tool and navigate to the notification management section. Here, you can create and configure notifications by specifying the message content, target audience, delivery timing, and display conditions. Once configured, these notifications will appear to users within the User Experience Panel at the designated times or events.

39.1.21.9. What types of notifications are available in UXP?

39.1.21.10. What is the Feature Tour?

The Feature Tour in UXP is an onboarding tool that introduces users to the key functionalities and features of an application. It provides step-by-step guidance, highlighting interface elements and demonstrating workflows to help users become proficient with the software quickly.

39.1.21.11. What are the best practices for using UXP?

39.1.21.12. How do I deploy and configure UXP for all end users?

Deploying and configuring UXP for all end users involves several steps:

- **Install the UXP Extension**: Integrate the UXP extension into your target application.
- **Configure Settings:** Customize UXP settings to align with organizational requirements, including tab configurations, notifications, and dynamic assets.
- **Assign Permissions**: Ensure that users have the necessary permissions to access UXP features.
- **Distribute Access**: Provide users with access to the UXP within their application interfaces.
- **Provide Training**: Offer guidance on how to utilize UXP effectively.

39.1.21.13. Releases

39.1.21.14. How often will there be new releases?

ClickLearn periodically releases updates to enhance functionality, introduce new features, and address issues. For the most accurate information on release frequency, it's recommended to monitor official announcements.

39.1.21.15. Where do I find release notes?

Release notes detailing the latest features, improvements, and fixes are available on the ClickLearn Community website. You can access them here.

39.1.21.16. How do I get releases if I opted for MSI?

If you've installed ClickLearn using the MSI package, updates are not applied automatically. To update, download the latest MSI installer from the ClickLearn Community: Download MSI Installation Package After downloading, run the installer to manually update your application.

39.1.21.17. Can I switch to getting automatic releases even if the initial installation was through MSI?

Yes, you can switch to the ClickOnce installation method to receive automatic updates. To do this, uninstall the MSI version and install ClickLearn using the ClickOnce installer. This version automatically updates to the latest release upon launching the application. For guidance on installing via ClickOnce, refer to: Install the latest Attain Studio (MSI)

40. Best Practices

40.1.Installation and Setup

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.1.1. Introduction

Getting ClickLearn Attain up and running smoothly requires proper system setup and installation. This guide covers do's and don'ts, best practices, and troubleshooting tips to help users and IT administrators ensure a successful installation.

40.1.1.1. ✓ Do's

- **Use a supported Windows version**
- Windows 11 or above
- **Install .NET Framework 4.8 or higher**
- ClickLearn relies on this framework.
- Ensure it's installed and updated before setup.
- **Make sure Microsoft Edge is installed**
- Required even if you use Chrome or another browser.
- Acts as a bridge for browser communication.
- **Close all browsers before installing**
- Prevents interference with the installation process and extension setup.

- **Ensure your system meets hardware requirements**
- Minimum: 16 GB RAM and a 4-core CPU
- Helps prevent performance issues during use.
- **Whitelist required ClickLearn URLs**
- Based on your region, whitelist URLs in your firewall or proxy settings.
- Replace [ORG NAME] with your actual organization name.
- **Follow all installation prompts**
- Don't skip steps even if they seem minor.
- **Install browser extensions for Chrome and Edge**
- Extensions are critical for capturing browser actions and syncing with ClickLearn.
- This component enables proper communication between browsers and ClickLearn Studio.

40.1.1.2. ✗ Don'ts

Don't install on Windows 8.0
- This version is not supported and will prevent the app from working.

Don't leave browsers open during installation
- Open sessions can block extension installs or disrupt setup.

Don’t use incorrect URLs
- Use region-specific URLs and always replace [ORG NAME] with your organization’s identifier.

Don’t skip required software
- All dependencies (Edge, .NET, extensions) are essential for full functionality.

40.1.1.3. Best Practices for Installation & Setup

Although this guide focuses on installation, here are a few publishing tips to keep in mind once you're set up:

Test content before publishing
- Preview your recordings locally to catch errors before going live.

Use clear naming conventions
- Helps you stay organized and simplifies search.

Apply segmentation and metadata
- Makes content more accessible and targeted.

Maintain regular backups
- Save your work regularly, especially before updates or reinstalls.

Confirm browser-extension connectivity
- Ensure Chrome and Edge extensions are correctly communicating with ClickLearn before publishing.

40.1.1.4. Troubleshooting Tips

Installation failed?
- Double-check your Windows version and make sure .NET 4.8+ is installed.

Browser extensions not working?
- Uninstall and reinstall extensions manually from the Chrome and Edge Web Stores.

Firewall or proxy blocking access?
- Confirm that all required ClickLearn URLs are whitelisted.

Publishing issues or broken previews?
- Try clearing your browser cache old data can interfere with new content.

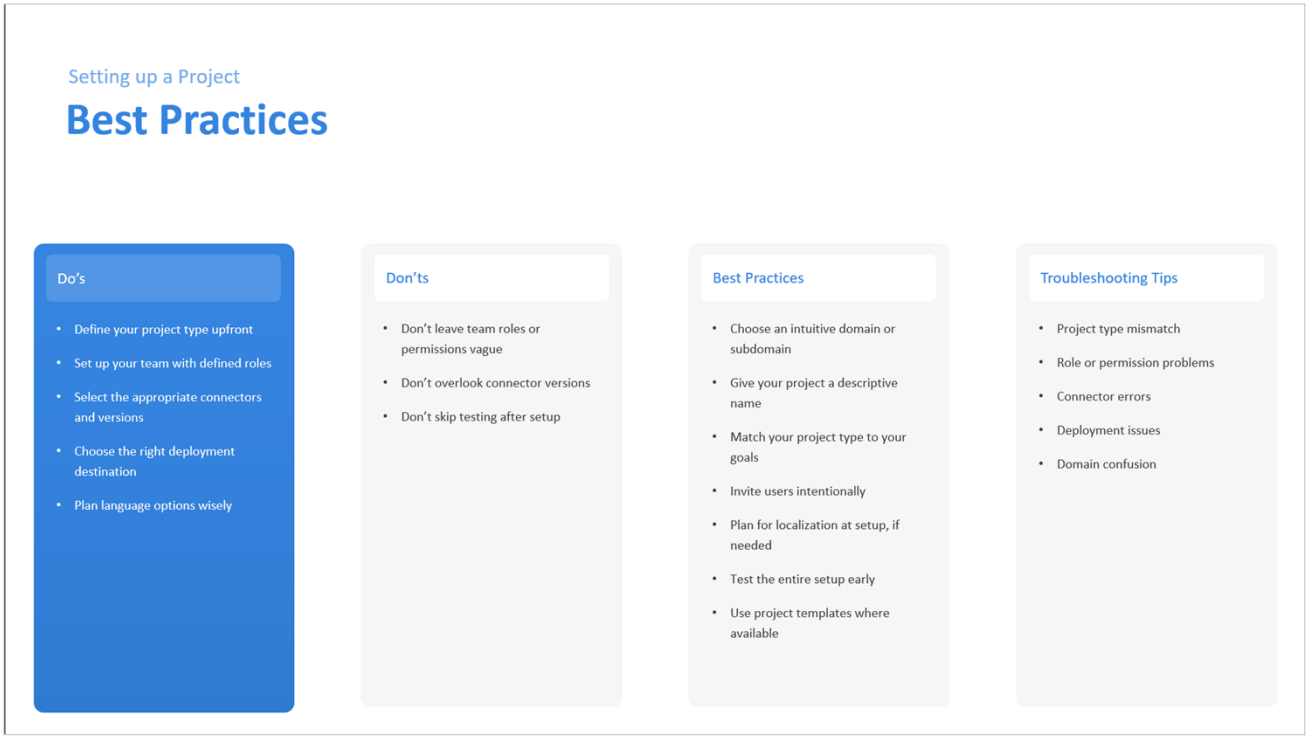
Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

40.2.Setting up a Project

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.2.1. Introduction

A strong start makes all the difference. Setting up your project properly in ClickLearn Attain lays the foundation for a smooth authoring experience and successful content delivery. Whether you’re building training guides, automated system tests, or in-app help, these setup stepsensure you avoid delays and rework later on.



40.2.1.1. ✓ Do's

Define your project type upfront

- Choose the correct type based on what you need:
- Content Project – for guides and documentation
- Automated Process Testing – for step-by-step system tests
- InsideHelp – for delivering contextual help in applications
- Each type unlocks different features, so picking the right one from the start is key.

Set up your team with defined roles

- Invite only necessary team members and assign appropriate roles—Author, Contributor, Administrator, etc. This helps protect content and streamline workflow.

Select the appropriate connectors and versions

- Identify which external systems (e.g., Dynamics 365, SAP, Salesforce) you'll connect to, and make sure you select the correct connector and version to avoid compatibility issues.

Choose the right deployment destination

- Decide where your finalized content will live (e.g., Content Cloud, SharePoint). Planning this early speeds up publishing and ensures user access.

Plan language options wisely

- Start with your primary language but consider adding others if localization is likely. Early planning here supports a smooth rollout across regions.

40.2.1.2. ✗ Don'ts

Don't leave team roles or permissions vague

- Undefined roles lead to confusion, errors, or security risks.

Don't overlook connector versions

- Mismatched connectors can cause system integration failures.

Don't skip testing after setup

- Test sample recordings and connector functionality up front to prevent time-consuming problems later.

40.2.1.3. Best Practices for Project Setup

Choose an intuitive domain or subdomain
- Use a domain like hr-training.clicklearn.cloud for easier organization and retrieval.

Give your project a descriptive name
- Use names like Q2_Sales_Training for quick identification and future reference.

Match your project type to your goals
- Double-check you are building the right kind of project for your target outcome (training, test automation, help, etc.).

Invite users intentionally
- Only give access to people who are necessary for the project, and review their permissions carefully.

Plan for localization at setup, if needed
- Don't wait until later to add languages if there's any future translation planned.

Test the entire setup early
- Run a demo recording, test connectors, and publish a sample to verify all components are working.

Use project templates where available
- If your organization uses templates, leverage them to ensure consistency and speed up setup.

40.2.1.4. Troubleshooting Tip

If something doesn't seem right during setup, here's what to check:

Project type mismatch
- Ensure you've selected the correct type; switching later is disruptive.

Role or permission problems
- If users are blocked or can't edit, double-check roles and user access.

Connector errors
- Confirm your connector and its version match the external application.

Deployment issues
- If content doesn't publish, recheck deployment platform and settings.

Domain confusion
- Use descriptive, short, and relevant domain names for easy access.

Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

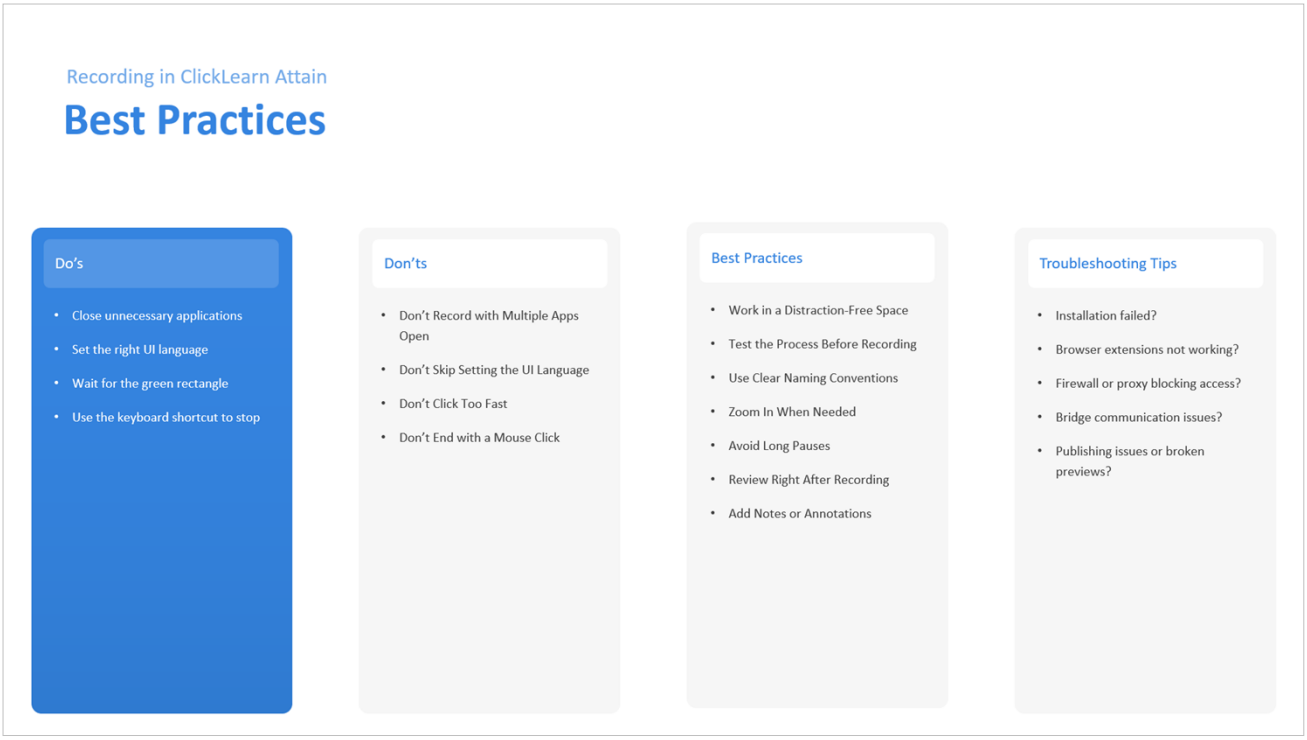
40.3. Recording in ClickLearn Attain

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.3.1. Introduction

Let's be honest—recording a process sounds easy until you're halfway through and realize you've got extra apps open, forgot to switch the UI language, or clicked too fast for the system to catch up. We've all been there.

The good news? With just a bit of prepand a few mindful habits, you can avoid those hiccups and create clean, helpful recordings every time. Whether you're brand new to ClickLearnor just need a refresher, this guide is here to walk you through the do's, don'ts, and best practices of recording like a pro.



40.3.1.1. ✓ Do's

Close Unnecessary Applications
- Keep only the application you're recording open. Extra windows or background apps can clutter the screen and distract both you and your audience. A focused screen leads to a focused recording.

Set the Right UI Language
- Before you begin, make sure the application you're recording is in the correct language. This helps keep things consistent with the rest of your project. It's a simple step that saves time later.

Wait for the Green Rectangle
- That green highlight around a button or field means ClickLearn has detected the element. Wait for it before clicking—otherwise, it might not capture correctly.

Use the Keyboard Shortcut to Stop
- Instead of fumbling with your mouse, just press both CTRL keys at the same time to end your recording. It's quick, reliable, and ensures the recording wraps up cleanly.

40.3.1.2. ✗Don'ts

Don't Record with Multiple Apps Open
- More windows mean more distractions—and more chances to click the wrong thing.

Don't Skip Setting the UI Language
- This one gets missed often, but it really matters. The wrong language setting can lead to mismatched or confusing steps in the final content.

Don't Click Too Fast
- If you rush, ClickLearn may not have time to recognize the element you're interacting with. That little green box? It's your friend.

Don't End with a Mouse Click
- It might feel natural to click your way out, but using the keyboard shortcut is smoother and more reliable.

40.3.1.3. Best Practices When Recording in ClickLearn Attain

Work in a Distraction-Free Space

- Mute notifications. Close chat apps. Focus on the task at hand. You'll be surprised how much cleaner your recording looks—and how much easier it is to follow.

Test the Process Before Recording

- Do a quick run-through of the steps. This helps you spot any tricky bits or decisions you'll need to make during the actual recording.

Use Clear Naming Conventions

- When you go back to find that recording later, you'll thank yourself. Use names that include project titles, dates, or relevant module numbers.

Zoom In When Needed

- If a button or section is too small to see clearly, zoom in before you start. This makes the output much easier for others to follow—especially learners who are new to the system.

Avoid Long Pauses

- ClickLearn can sometimes pick up those idle moments as extra steps. Stay steady, keep moving, and try not to leave long gaps between actions.

Review Right After Recording

- Don't wait. Watch your recording while it's fresh in your mind. You'll catch anything that's off before you forget what happened.

Add Notes or Annotations

- If something needs further explanation or a voice-over later, jot it down while you're still in the recording flow. It'll save you time during editing.

40.3.1.4. Troubleshooting Tip

Sometimes, even with your best prep, things don't go as planned. If your recording isn't capturing correctly, try these fixes:

Pause and Re-Hover

- If the green box doesn't show up, pause. Hover again. Give it a second. Often, that's all it needs.

Run ClickLearn as Administrator

- This gives the recorder access to all the areas it needs—especially in applications that require elevated permissions.

Check App Compatibility

- Make sure the app you're recording is supported and fully loaded. Wait until it's fully open before hitting record.

Use a Single Monitor

- Recording across two screens can confuse the system. Stick to one monitor for the cleanest results.

Restart Before Recording

- If your system's acting slow or the recording tool seems off, give your machine a quick reboot. It can clear out glitches and make everything run smoother.

Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

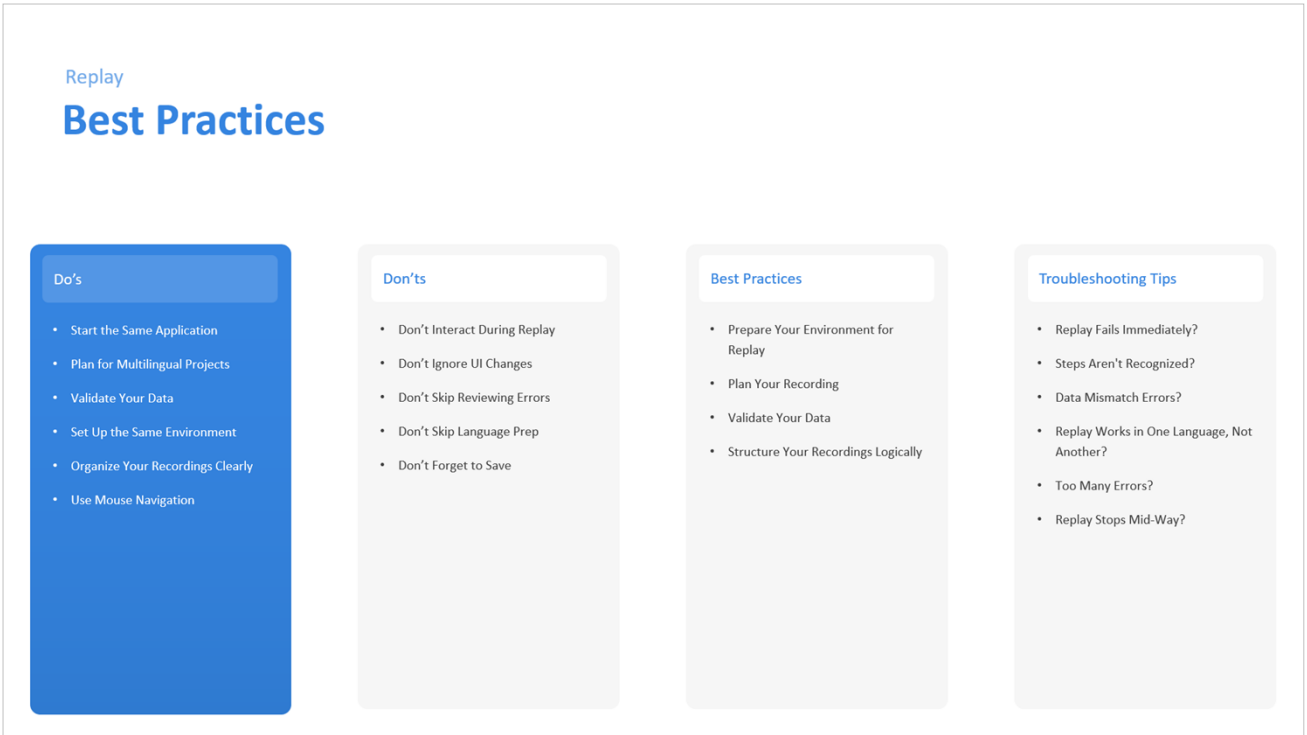
40.4. Replay

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.4.1. Introduction

System upgrades and UI changes don't have to mean starting over. Replay in ClickLearn Attain helps you automatically update existing recordings when your business systems change. It re-records your steps using the current application version—saving manual effort and keeping content up-to-date.

Follow this guide for a smooth, error-free Replay experience:



40.4.1.1. ✓ Do's

Start the Same Application
- Always open the exact same application, in the same version and layout as during your original recording. Any mismatch may cause Replay to fail.

Plan for Multilingual Projects
- Replay in the original recording language first. Fix all issues there before moving to other languages—this prevents duplicating problems.

Validate Your Data
- Replay relies on the same data (IDs, orders, forms, etc.) as in the original recording. Make sure they still exist in your system.

Set Up the Same Environment
- Ensure screens, menus, popups, and tabs match their original state.

Organize Your Recordings Clearly
- Well-structured, logical steps make Replay more reliable.

Use Mouse Navigation
- Replay recognizes mouse clicks better than keyboard shortcuts. Prefer mouse actions during the original recording.

40.4.1.2. ✗ Don'ts

Don't Interact During Replay
- Don't touch your mouse or keyboard while Replay runs—interference can corrupt the process.

Don't Ignore UI Changes
- Even small UI tweaks (moved buttons, renamed fields) can cause Replays to fail. Check for and address these before starting.

Don't Skip Reviewing Errors
- If a step fails, pause to troubleshoot—don't continue with more errors.

Don't Skip Language Prep
- UI elements differ across languages. Adjust each localized version carefully.

Don't Forget to Save
- Always save after adjusting or excluding steps to keep everything consistent.

40.4.1.3. Best Practices While Using Replay

Prepare Your Environment for Replay
Ensure the application is open and in the same state as it was during the original recording.
- (This consistency is essential for a successful and error-free replay.)

Plan Your Recording
For multilingual projects, always replay your recording in the original language first.
- (This helps identify errors before expanding to other languages and ensures consistency across localized replays.)

Validate Your Data
Ensure that all necessary test or real data is available and correct in the system when recording.
- (Accurate data is a core requirement for the replay to work as expected.)

Structure Your Recordings Logically
Organize your recordings so that each process transitions smoothly into the next.
- (This helps in creating clear, modular, and reusable content during replay sessions.)

40.4.1.4. Troubleshooting Tip

Replay Fails Immediately?
- Make sure the application is fully launched before clicking Replay.

Steps Aren't Recognized?
- The UI may have changed. Use 'Record & Replace' to fix broken steps.

Data Mismatch Errors?
- If key data (like order numbers) is missing, use ‘Change Data’ or ‘Record Next Step’ to update it.

Replay Works in One Language, Not Another?
- Replay and clean up the original language first, then apply to other languages.

Too Many Errors?
- If you’re stuck looping on errors, re-record the section or contact ClickLearn Support.

Replay Stops Mid-Way?
- Don’t touch the device during Replay—this is the top cause of stoppages and corruption.

Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

40.5.Structure and Segments

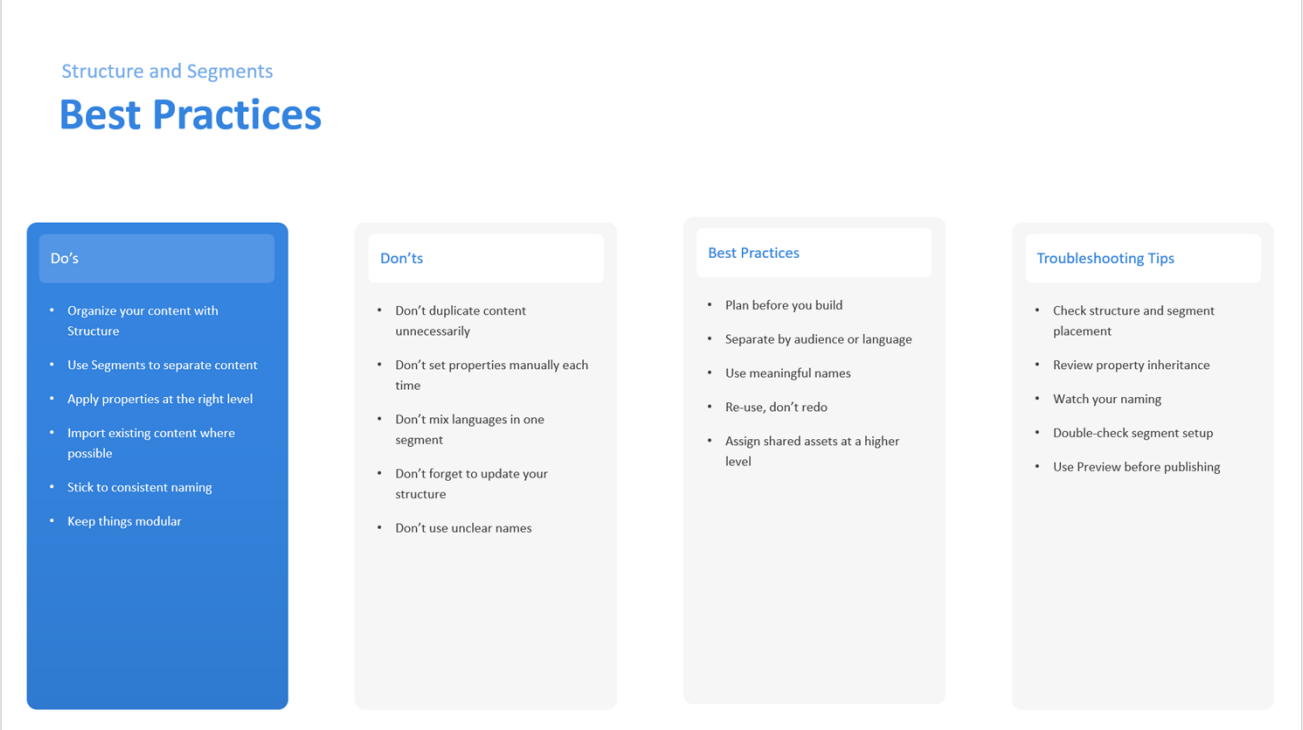
Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.5.1. Introduction

If you've ever had to juggle multiple languages, user roles, or updates across projects, you know things can get messy fast. That's where Structureand Segmentscome in—they help you stay organized, work smarter, and deliver cleaner content every time.

Think of Structureas the blueprint and Segments as the smart way to speak to different audiences—all without duplicating your efforts.

Here are some practical do's and don'ts to help you get started (or stay sharp) with Structureand Segments.



40.5.1.1. ✓ Do's

Organize your content with Structure
- Set up a logical folder structure from the beginning. It helps your team stay aligned and makes updating easier down the line.

Use Segments to separate content
- Create different segments for different languages, user roles, or departments. This keeps things clean and avoids mixing content that shouldn't be mixed.

Apply properties at the right level
- Use structure-level properties so they apply automatically to everything inside. It saves time and ensures consistency.

Import existing content where possible
- Use the import feature to bring in recordings and assets you've already made. It speeds things up and keeps your content aligned.

Stick to consistent naming
- Name folders and segments clearly—think module names, user groups, or language codes. It'll save you (and your teammates) time when searching later.

Keep things modular
- Break content into small, reusable parts. You'll thank yourself when projects grow or change.

40.5.1.2. ✗ Don'ts

Don't duplicate content unnecessarily
- Instead of copying the same thing across multiple segments, reuse recordings wherever you can.

Don't set properties manually each time
- Avoid applying settings one-by-one. Use structure properties to make global changes.

Don't mix languages in one segment
- Keep each language in its own lane. It keeps the learner experience clean and translation work manageable.

Don't forget to update your structure
- If you add new recordings or assets, make sure your structure reflects it. Otherwise, things get lost or out of sync.

Don't use unclear names

- “Folder1” or “Test Segment” may work today, but not next month. Use names that make sense long-term.

40.5.1.3. Best Practices When Making Structure and Segment

Plan before you build
- Sketch out your structure and segments before you dive in. A little prep prevents a lot of cleanup later.

Separate by audience or language
- Keep different user types or languages in their own segments. It simplifies content delivery and helps your learners see only what’s relevant to them.

Use meaningful names
- Choose clear, descriptive names for every folder and segment. It improves collaboration—especially in teams.

Re-use, don’t redo
- If you've already created something useful, reuse it. Structure and Segments are designed to make that easy.

Assign shared assets at a higher level
- For things like logos, layouts, or disclaimers—apply them at the structure or portal level. It keeps branding consistent across the board.

40.5.1.3.1. Troubleshooting Tip

If something in your portal doesn’t look right—like missing content, wrong language showing up, or inconsistent styling—here’s what to check:

Check structure and segment placement
- Make sure each recording and asset is in the right folder and linked to the right segment.

Review property inheritance
- If branding or behavior isn’t consistent, check if the properties are applied at the correct structure level.

Watch your naming
- Typos or unclear names can make content hard to find—or even cause visibility issues in the portal.

Double-check segment setup
- Confirm that each segment is assigned the correct language or user group.

Use Preview before publishing
- Run a quick preview to catch issues early. It's faster to fix before the content goes live.

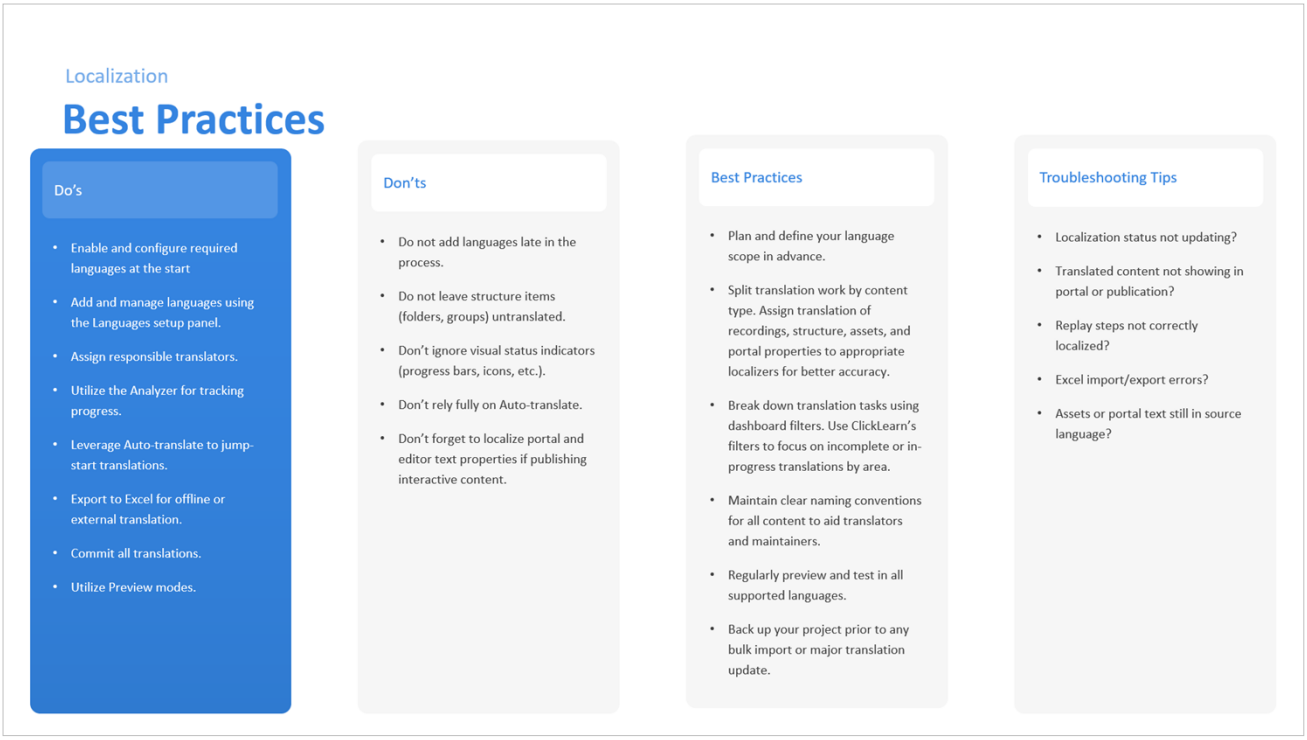
Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

40.6. Localization

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.6.1. Introduction

ClickLearn’s localizationfeatures let you deliver content in multiple languages—ensuring a consistent and accessible experience for global users. This guide provides practical do’s, don'ts, best practices, and troubleshooting tips, based on the latest ClickLearn product documentation.



40.6.1.1. ✓ Do's

Enable and configure required languages at the start

- Use the Project Settings > Languages section to enable all languages you plan to support. This is essential for proper structure and step-level translation.

Add and manage languages using the Languages setup panel.

- This provides a clear overview and lets you manage language settings in one place.

Assign responsible translators.

- Use the Assignees function on the localization dashboard to designate localizers per language or step, improving accountability and workflow.

Utilize the Analyzer for tracking progress.

- Regularly run the Analyzer from the localization dashboard to get a progress overview and identify untranslated areas.

Leverage Auto-translate to jump-start translations.

- Use Auto-translate to populate recordings and steps as a starting point, but always review and edit for correctness.

Export to Excel for offline or external translation.

- ClickLearn enables exporting translation tasks to Excel for collaboration with localization vendors or offline work.
- **Translate all relevant containers: recordings, structure elements, assets, and portal properties.**

Commit all translations.

- After editing a translation, press Ctrl+Enter to ensure it is committed and reflected in the output.

Utilize Preview modes.

- Preview your portal or documents in the target language before publishing to ensure translations and formatting display as expected.

40.6.1.2. ✗ Don'ts

Do not add languages late in the process.

- Always configure all languages needed at the project's start for smooth workflow.

Do not leave structure items (folders, groups) untranslated.

- This affects the portal navigation and user clarity for non-default languages.

Don't ignore visual status indicators (progress bars, icons, etc.).

- ClickLearn's dashboard uses color codes and icons to flag items needing attention.

Don't rely fully on Auto-translate.

- Auto-translate saves time, but always have a human reviewer ensure linguistic accuracy and context.

Don't forget to localize portal and editor text properties if publishing interactive content.

- Don't overwrite Excel templates with non-standard formatting or column changes. Always use the exported template for imports.

40.6.1.3. Best Practices for Localization

- Plan and define your language scope in advance.
- Split translation work by content type. Assign translation of recordings, structure, assets, and portal properties to appropriate localizers for better accuracy.
- Break down translation tasks using dashboard filters. Use ClickLearn's filters to focus on incomplete or in-progress translations by area.
- Maintain clear naming conventions for all content to aid translators and maintainers.
- Regularly preview and test in all supported languages.
- Back up your project prior to any bulk import or major translation update.

40.6.1.4. Troubleshooting Tip

Localization status not updating?

- Use the Run Analyzer button to re-calculate and refresh the localization dashboard.

Translated content not showing in portal or publication?

- Confirm translations are committed and the language is published and activated.

Replay steps not correctly localized?

- Verify the UI is switched to the desired language before running replays.

Excel import/export errors?

- Check for template mismatches, incorrect column headers, or missing required data. Use freshly exported Excel files as your working template.

Assets or portal text still in source language?

- Make sure properties and assets are assigned and localized for all required languages.

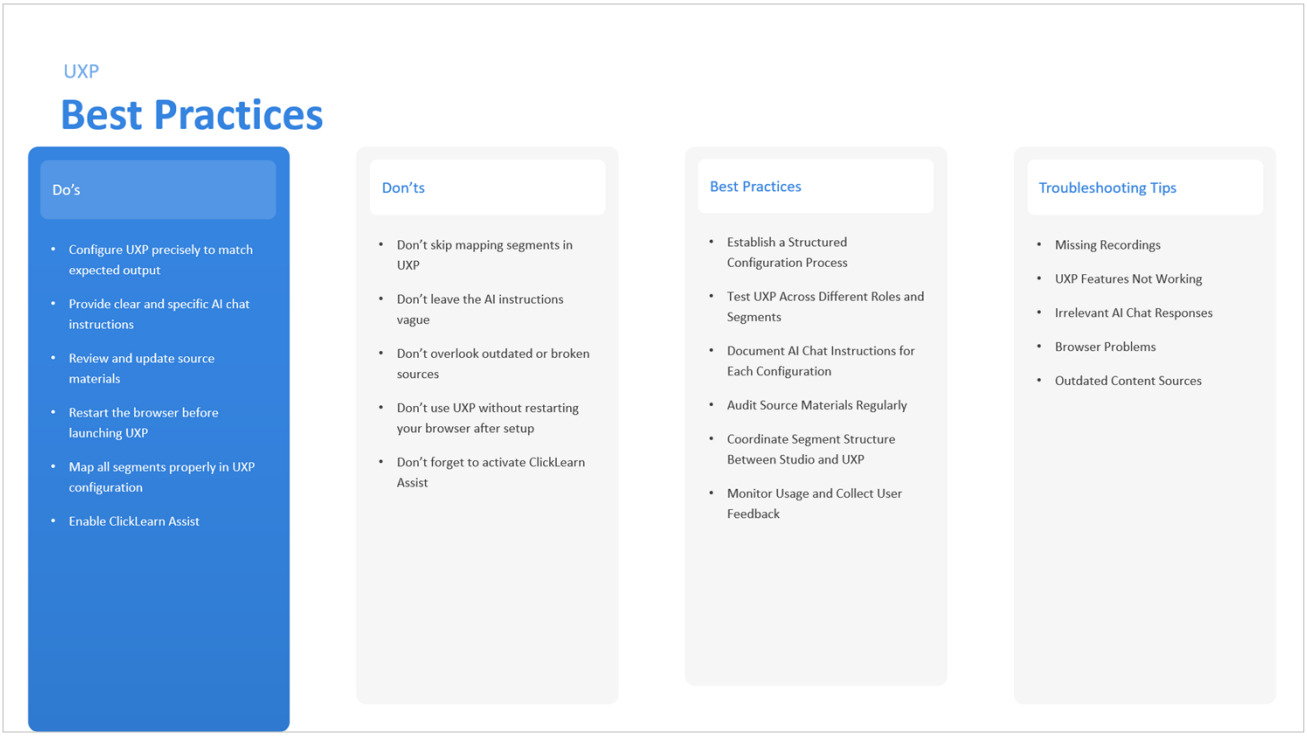
Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

40.7.UXP

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.7.1. Introduction

The ClickLearn User Experience Panel(tm) (UXP) is designed to deliver AI-powered guidance, in-app training, and real-time support—right within your software ecosystem. To ensure optimal use of UXP, this guide covers essential do's and don'ts, best practices for deployment, and troubleshooting tips.



40.7.1.1. ✓✓ Do's

Configure UXP precisely to match expected output
- Ensure your UXP configuration aligns with the intended user experience and learning goals. The setup you create directly affects how content is delivered.

Provide clear and specific AI chat instructions
- For accurate AI chatbot responses, supply well-defined, role-appropriate, and context-rich instructions during setup.

Review and update source materials
- Verify that linked documentation sources such as PDFs and recordings are accurate, relevant, and up to date. Modify content as needed before publishing.

Restart the browser before launching UXP
- Restarting the browser ensures that any recent changes, especially related to extensions and configurations, are fully applied.

Map all segments properly in UXP configuration
- If you assign segments in your structure and do not map them in the UXP configuration, related recordings won't appear in the UXP interface.

Enable ClickLearn Assist
- ClickLearn Assist must be activated for the UXP to function. Check its status under the publishing template settings to ensure it's enabled.

40.7.1.2. ✕ Don'ts

Don't skip mapping segments in UXP
- Unmapped segments result in missing recordings and incomplete learning experiences for users.

Don't leave the AI instructions vague
- General or unclear chatbot prompts reduce the quality of guidance and may confuse users.

Don't overlook outdated or broken sources
- Neglecting to update linked PDFs or recordings can lead to misinformation or broken experiences in the UXP.

Don't use UXP without restarting your browser after setup

- Changes to configuration or extensions may not load properly until the browser is restarted.

Don't forget to activate ClickLearn Assist

- Without this component, UXP features like AI chat and in-app assistance won't function as expected.

40.7.1.3. Best Practices While Using Replay

Establish a Structured Configuration Process

- Create a standardized setup procedure for UXP to ensure reliable and repeatable deployment results.

Test UXP Across Different Roles and Segments

- Validate that content visibility and guidance function correctly for all user roles and audience segments.

Document AI Chat Instructions for Each Configuration

- Record detailed AI chat workflows to ensure all team members can replicate and understand each setup.

Audit Source Materials Regularly

- Review and update content prior to UXP publication to maintain accuracy and high quality.

Coordinate Segment Structure Between Studio and UXP

- Align segment organization in both platforms to ensure consistent content delivery and avoid omissions.

Monitor Usage and Collect User Feedback

- Track how users interact with UXP and gather their insights to inform improvements in subsequent releases.

40.7.1.4. Troubleshooting Tips

Missing Recordings

- Ensure associated segments are mapped correctly in UXP to make recordings appear.

UXP Features Not Working

- Confirm ClickLearn Assist is enabled in the publishing template for full feature functionality.

Irrelevant AI Chat Responses

- Refine the chatbot instructions to improve the accuracy of AI-generated answers.

Browser Problems

- Clear your browser cache and restart it before reloading the UXP to resolve technical issues.

Outdated Content Sources

- Re-publish up-to-date PDFs or recordings to keep information current and relevant.

Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

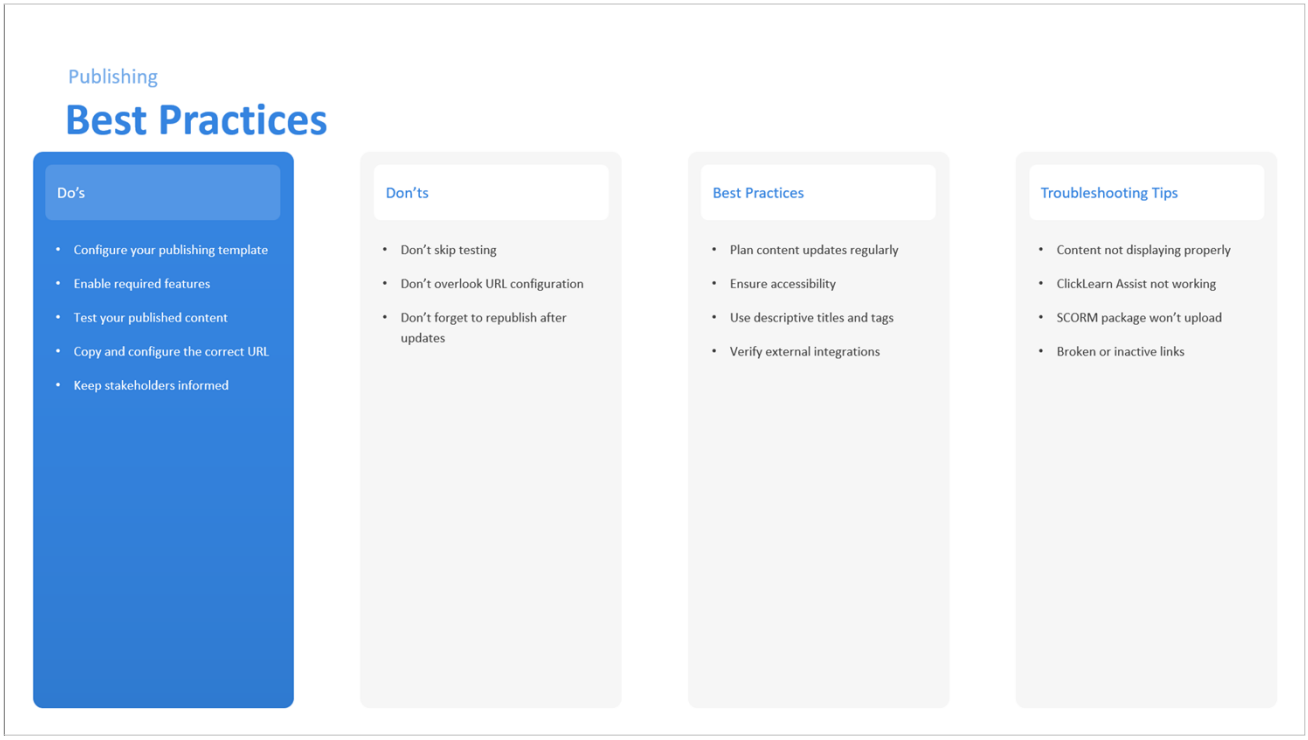
40.8.Publishing

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.8.1. Introduction

Publishingis the final but crucial step to make your content available to learners through the portal. Whether it's a how-to guide, course module, or training series, successful publishing ensures everything looks and works just right for your audience.

This guide shares key do's, don'ts, best practices, and troubleshooting tips to help you avoid common mistakes and deliver polished, accessible content every time.



40.8.1.1. ✓ Do's

Configure your publishing template
- Before you hit "publish," double-check your template settings. This includes display options, navigation structure, links, integrations, and any personalized branding.

Enable required features
- Ensure all necessary elements—like ClickLearn Assist or SCORM support—are turned on in your publishing setup.

Test your published content
- Always preview and test your content in the portal. Look for broken elements, layout issues, or interactive glitches before users see it.

Copy and configure the correct URL
- After publishing, grab the right link—especially important if you're using Assist or SCORM. A wrong URL can break access or functionality.

Keep stakeholders informed
- Let your team or clients know when new content is live. Especially when it supports active projects or training timelines.

40.8.1.2. ✗ Don'ts

Don't skip testing
- Publishing without a content check can lead to broken layouts, faulty navigation, or inaccessible materials. Always test!

Don't overlook URL configuration
- Incorrect URLs mean broken Assist buttons or SCORM imports. Validate your links, especially when integrating with external tools.

Don't forget to republish after updates
- If you catch errors post-publish or make changes, don't leave the portal outdated. Republish with corrections to keep everything aligned.

40.8.1.3. Best Practices While Publishing Content

Plan content updates regularly

- Set a calendar or checkpoint to refresh content. Let users know when key changes are made, especially in active courses.

Ensure accessibility

- Make content usable for everyone—including users with disabilities. Use screen reader-friendly formats, captions for videos, and contrast-friendly color schemes.

Use descriptive titles and tags

- Titles should tell users what to expect. Tags help organize and surface relevant content through search.

Verify external integrations

- For SCORM and ClickLearn Assist, test integrations before going live. Confirm they're linking, tracking, and displaying properly.

40.8.1.4. Troubleshooting Tips

- **Content not displaying properly**
- Check if all required features in your publishing template are turned on.
- Make sure no media (images, audio, videos) is missing or broken.
- **ClickLearn Assist not working**
- Verify that the Assist URL is correctly copied and added in the target system.
- Revisit the Assist configuration to confirm the correct path is used.
- **SCORM package won't upload**
- Make sure the SCORM file is zipped correctly.
- Check that your LMS supports the SCORM version used in the package (e.g., SCORM 1.2 or SCORM 2004).
- **Broken or inactive links**
- Go back and verify each URL.
- Copy-paste the full link from the publishing portal, not from your browser bar unless explicitly instructed.

Still not sure what went wrong?
Explore theClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

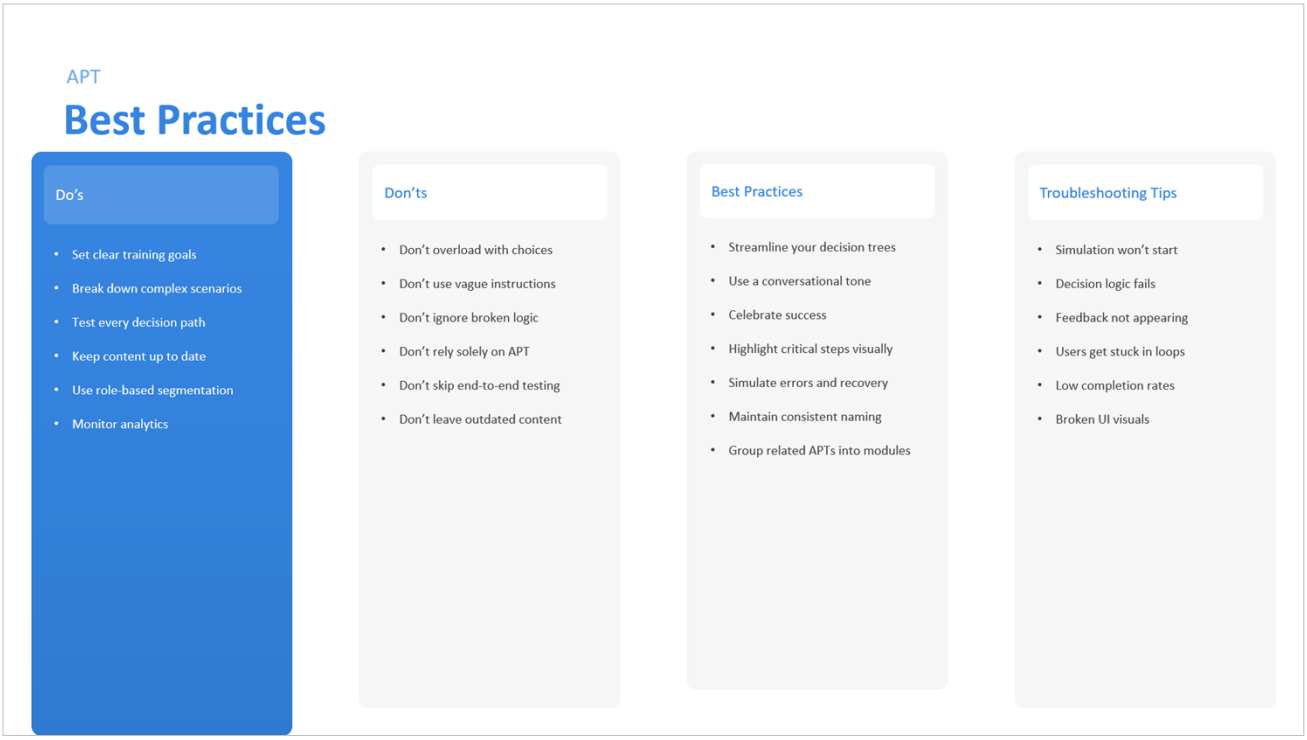
40.9.APT

Best practices help you get it right from the start, so you can work smarter, save time, and deliver consistent, reliable results.

40.9.1. Introduction

Automated Process Testing **(APT**) in ClickLearn Attain is your safety net when systems change. Instead of manually checking every workflow after an upgrade, APT runs through your critical processes automatically—spotting issues before they reach your users. It's perfect for validating everything from single tasks to complex process chains, giving you confidence that your digital environment stays stable and reliable.

Before diving into APT, make sure you've got Replay down pat—APT builds on that feature to simulate and test your recorded steps.



40.9.1.1. ✓ Do's

Set clear training goals
- Know exactly what you want learners to achieve. Defining goals up front keeps your APT focused and aligned with business needs.

Break down complex scenarios
- Divide long or detailed processes into bite-sized steps. It makes simulations easier to follow and helps learners build confidence as they progress.

Test every decision path
- Cover all branches—yes and no, approve and reject, save and cancel. Thorough testing prevents dead ends or logical gaps that can trip up users.

Keep content up to date
- Whenever your application changes, update your APT scripts. Fresh tests reflect the current UI and avoid teaching outdated steps.

Use role-based segmentation
- Show each user only the APT content they need. Tailoring simulations by role or department keeps training relevant and reduces clutter.

Monitor analytics
- Review completion rates, error counts, and drop-off points. Data helps you spot pain points and refine your APT for better learning outcomes.

40.9.1.2. ✗ Don'ts

Don't overload with choices
- Too many branching options can confuse learners. Stick to the essential paths that support your core training goal.

Don't use vague instructions
- Ambiguity frustrates users. Each prompt should tell learners exactly what to do next.

Don't ignore broken logic
- If a decision path loops endlessly or leads nowhere, users get stuck. Test and fix all branches before rolling out.

Don't rely solely on APT
- Complement APT with Replays and traditional documentation. A blended approach accommodates

different learning styles.

Don't skip end-to-end testing

- Always run the full simulation from start to finish. Partial tests can miss issues that only appear late in the process.

Don't leave outdated content

- Screenshots or text from old versions can mislead learners. Keep every asset in sync with your live environment.

40.9.1.3. Best Practices While Using APT

Streamline your decision trees

- Focus on key learning outcomes, not every rare scenario.

Use a conversational tone

- Friendly prompts feel more human and engaging.

Celebrate success

- Add brief "Well done!" messages when users complete steps correctly.

Highlight critical steps visually

- Use icons or colors to call out warnings, required fields, or important notes.

Simulate errors and recovery

- Show common mistakes and how to fix them—real-world practice matters.

Maintain consistent naming

- Name your APT files and steps to reflect their process and sequence (e.g., "Invoice_Entry_Step_03").

Group related APTs into modules

- For multi-part processes, organize simulations into a logical series for a progressive learning path.

40.9.1.4. Troubleshooting Tips

Simulation won't start

- Check that all media files (screenshots, audio) are correctly linked. Missing assets can block APT from launching.

Decision logic fails

- Walk through each branch in the editor. Ensure every choice is mapped and that paths converge or exit cleanly.

Feedback not appearing

- Verify that prompts and feedback elements are connected to the right actions—and that none are hidden or disabled.

Users get stuck in loops

- Review your loop conditions. Make sure every cycle has a clear exit point so learners can continue.

Low completion rates

- Dive into analytics to find where learners drop off. Simplify or clarify those steps to improve flow.

Broken UI visuals

- Re-record affected steps in your live environment. Then update the APT assets to match the current interface.

Still not sure what went wrong?
Explore the ClickLearn Community for similar issues, or contact ClickLearn Support for expert guidance.

40.10. Resource Library

Know where to go for help before you need it , so blockers are resolved quickly without raising a support ticket.

40.10.1. ClickLearn Resource Library - Stay Ahead with Expert Insights!

Looking to sharpen your skills, explore new features, or simply stay updated with everything ClickLearn?

You’re in the right place.

ClickLearn Community: Connect, ask questions, and learn from fellow ClickLearn users.
- *Explore now* → ClickLearn Community

ClickLearn Universe: Your learning space filled with self-paced courses and tutorials.
- *Start learning* → ClickLearn Universe

Product Documentation: Step-by-step technical guidance to help you get the most out of ClickLearn.
- *Access docs* → Product Documentation

Morten's Corner: Insider thoughts, leadership lessons, and sharp takes from our Senior Support Consultant Morten.
- *Take a peek* → Morten’s Corner

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