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21.2.19.	Release 10.0.0.40, 2014-01-26	375
21.2.20.	Release 10.0.0.26, 2013-08-11	375
21.2.21.	Release 10.0.0.1, 2013-05-28	375

1. Product Documentation

1.1. Introduction

1.1.1. Installation

1.1.1.1. Click Once installation

To install ClickLearn please open your Internet Explorer and enter the address <https://apps.clicklearn.com/Studio/ClickLearnStudio.application>

The Microsoft Click Once technology ensures that you always have access to the newest ClickLearn Studio release.

If you are installing on Windows XP or Windows 7 and do not have Microsoft .NET Framework 4 installed, please use the link <https://apps.clicklearn.com/Studio/setup.exe>

1.1.1.2. On premise installation

To install ClickLearn Studio please download the installation package. Open Internet Explorer and enter the address <https://apps.clicklearn.com/ClickLearnStudioSetup.msi> Save it and run it.

Please remember that this requires access rights to install it. If you are not allowed to, please contact your system administrator.

When installing ClickLearn Studio this way, you manually need to download the latest installation package and update your system.

1.1.2. Application Data

ClickLearn requires to store application data on the machine where it is installed.

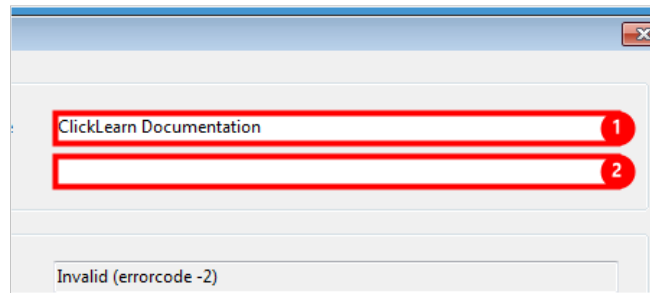
It is required that the user logged on to the system has full access to the folder C:\ProgramData\ClickLearn.

The data stored is for all users on the machine, so it is shared by all if installed on a server.

No data will be stored in the Windows registry database.

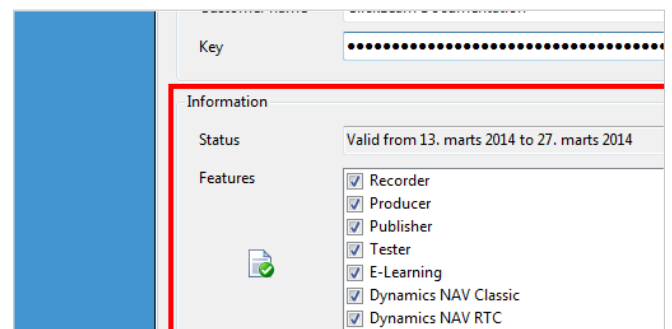
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1.1.3. License information



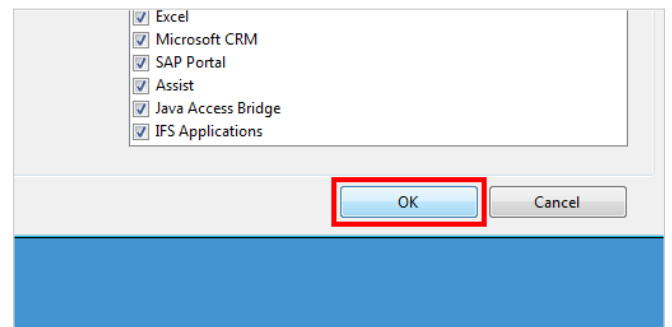
1. Click on the input field **Customer Name**. - Enter **Customer Name**.
2. Click on the input field . - Enter **Key**.

Click on the group **Information**.



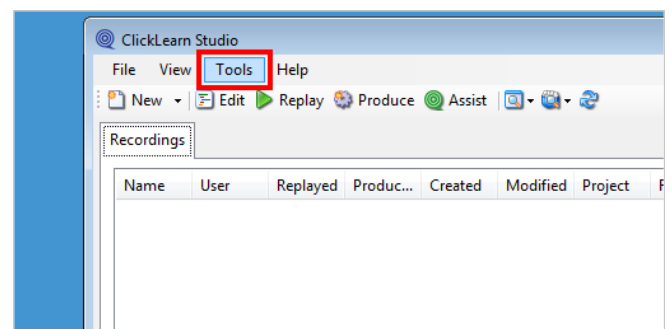
When the license information is present, you may start using ClickLearn.

Click on the button **OK**.

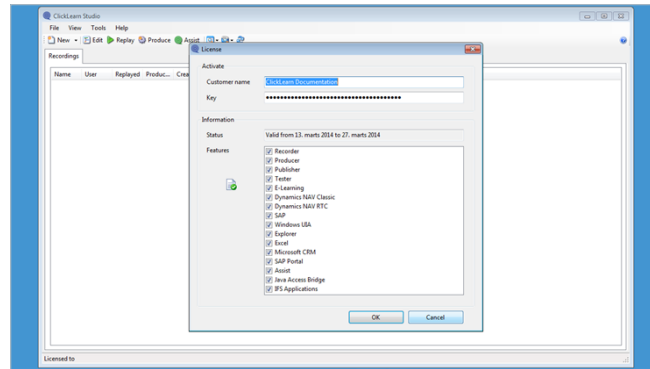
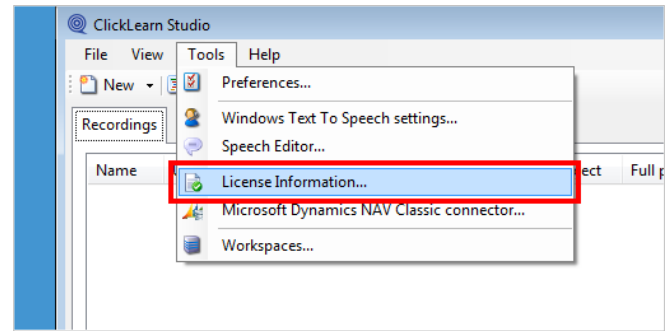


1.1.3.1. Finding license information

Click on the menu **Tools**.

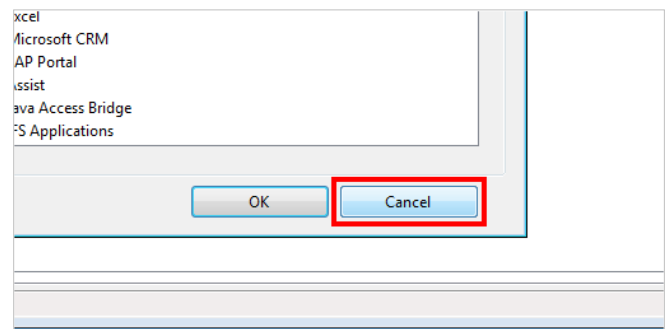


Click on the menu **License Information....**



Current license information

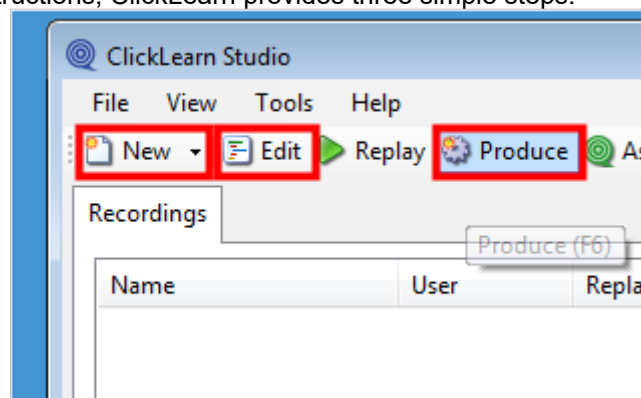
Click on the button **Cancel**.



1.1.4. ClickLearn Studio

1.1.4.1. Easy creation of work instructions

To create and edit work instructions, ClickLearn provides three simple steps.



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1.1.4.1.1. **New**

Instead of writing text and cropping images into a word document manually, ClickLearn provides a recording feature, where the work instruction is recorded as you perform the process in the application.

1.1.4.1.2. **Edit**

It is possible to edit your recorded work instruction. You may remove incorrect clicks, adding chapters, subchapters, notes, screen samples and grouping of steps.

If you missed some steps in your work instruction, or new steps have been added to the application, you may record these additional steps and paste them into your existing work instruction.

1.1.4.1.3. **Produce**

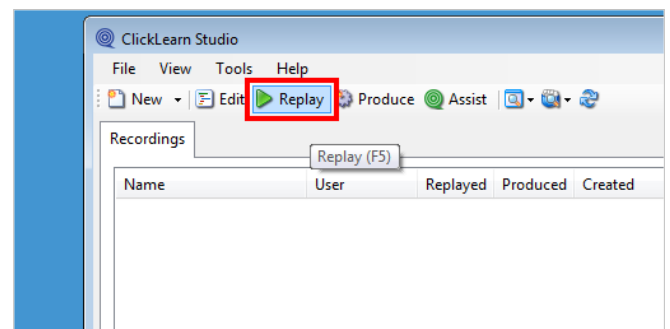
When you produce the material, you get the work instruction as a word document. Never edit the word document. Always do all editing in ClickLearn.

Producing does not only result in a Word document. You will also get learning material in formats like PowerPoint and Video.

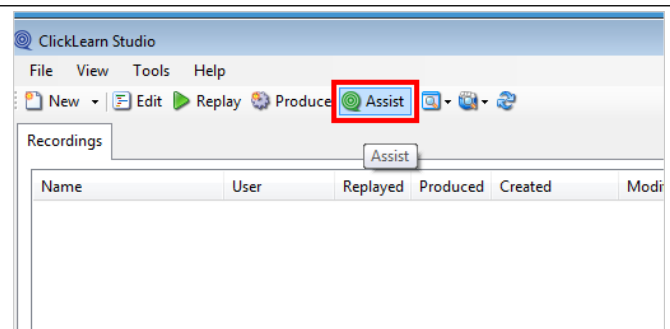
1.1.4.2. **Advanced features**

Maintaining work instructions may be a difficult task and often result in re-creating it. With ClickLearn, it is possible to automatically replay the work instruction on the updated system. Hereby all material will be up to date.

Move the mouse to the button **Replay**.



Move the mouse to the button **Assist**.



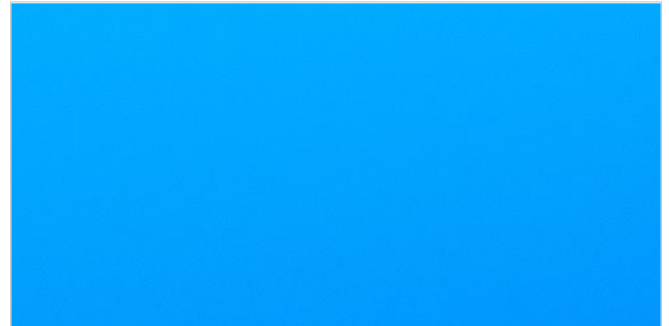
1.2. Resolution and scaling

In order for the recorder to capture the steps correctly you may need to set the right screen resolution and make sure not to use text scaling.

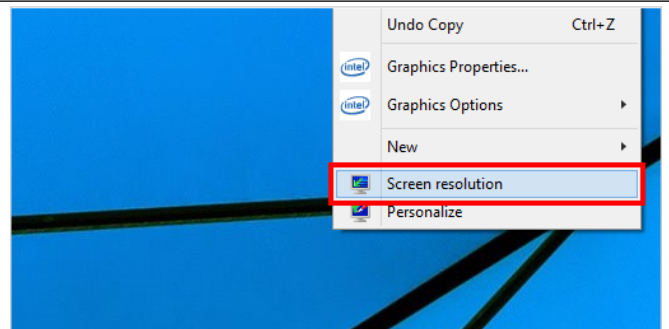
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If the scaling is wrong your windows system may report incorrect coordinates to ClickLearn.

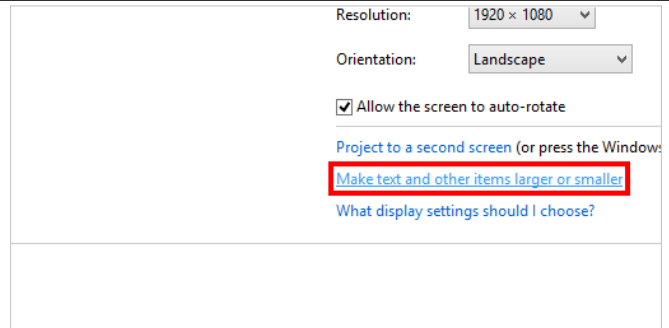
Right click on **the Desktop background**.



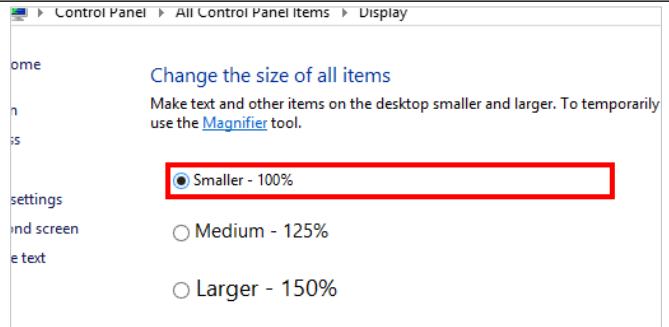
Click on the menu **Screen resolution**.



Click on the link **Make text and other items larger or smaller**.



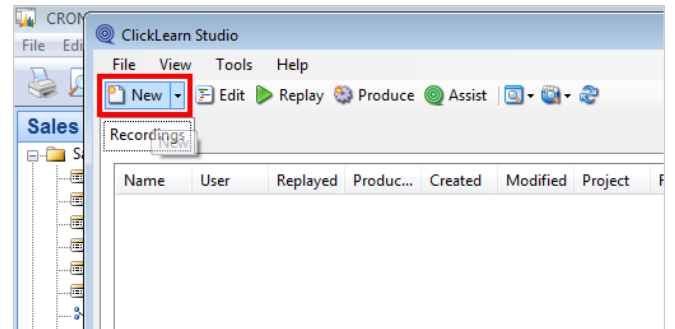
Click on the radio button **Smaller - 100%**.
You may also press **ALT+S**.



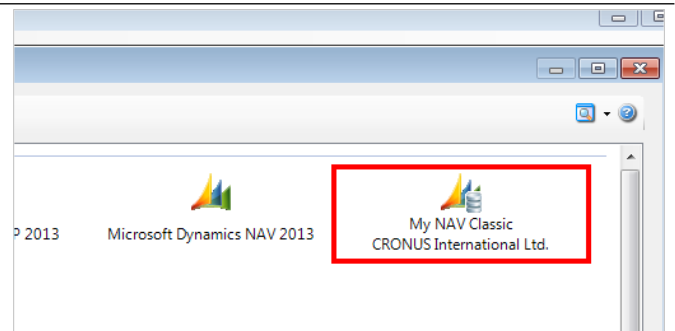
1.3. Record work instruction

1.3.1. Start recorder

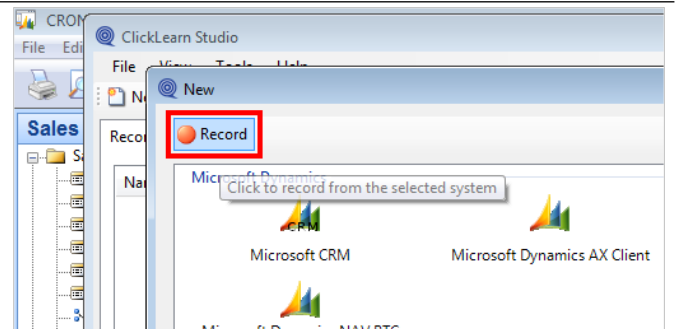
Click on the button **New**.



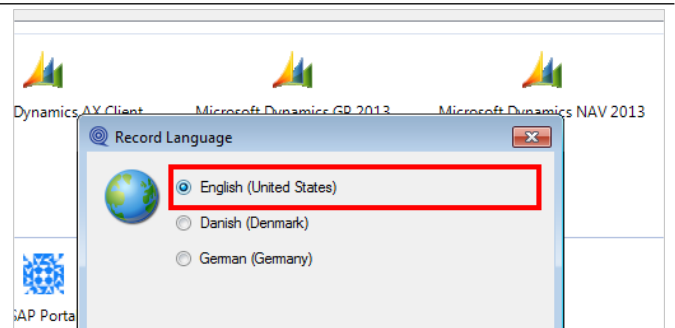
Click on the list element **My NAV Classic, CRONUS International Ltd.**



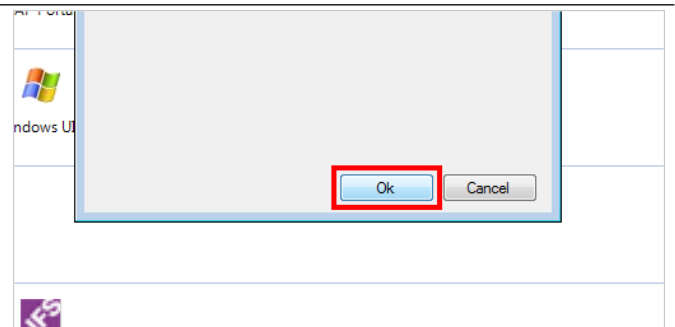
Click on the button **Record**.



Click on the radio button **English (United States)**.

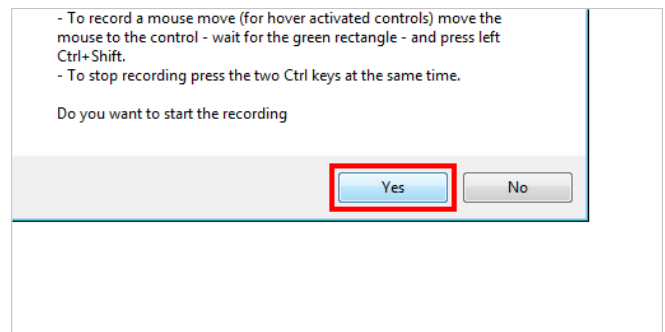


Click on the button **Ok**.



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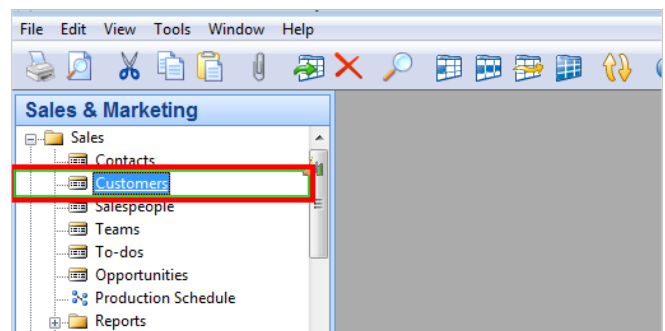
Click on the button **Yes**.



1.3.2. Perform the work instruction

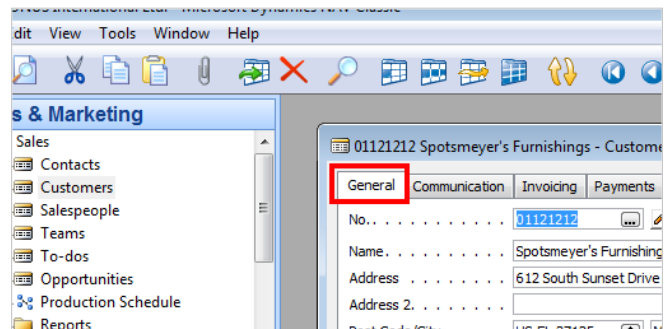
For each step in the work instruction you need to wait for the green rectangle before performing the click.

Select **Sales, Customers** from the menu **Sales & Marketing** in the Navigation Pane



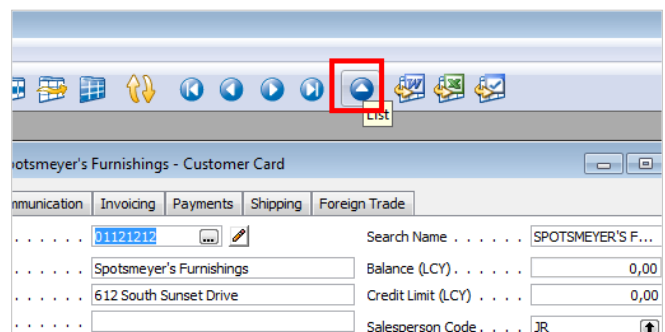
Never assume that the current tab is always the initial tab when a form is entered. It is good practice to click it and this will automatically add a text to the work instruction stating which tab is used.

Select the tab named **General**



The system provides shortcut keys, but good practice for work instructions are to click on the tool strip item instead as it will automatically add the shortcut in the final work instruction. If no tool strip is available for the shortcut or you still want to use it, please consider to add some notes before this step to improve the work instruction.

Click **List** on the toolbar



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Click on row '10000'

No.	Name	Responsi...	Location ...	P
01121212	Spotsmeyer's Furnishings		YELLOW	
01445544	Progressive Home Furnishings		YELLOW	
01454545	New Concepts Furniture		YELLOW	
01905893	Candoxy Canada Inc.		YELLOW	
01905899	Elkhorn Airport		YELLOW	
01905902	London Candoxy Storage Cam...		YELLOW	
10000	The Cannon Group PLC	BIRMING...	BLUE	
20000	Selangorian Ltd.			
20309920	Metatorad Malaysia Sdn Bhd		YELLOW	
20312912	Highlights Electronics Sdn Bhd		GREEN	
20339921	TraxTonic Sdn Bhd		YELLOW	
21233572	Somadis		YELLOW	
21245278	Maronegoce		BLUE	
21252947	ElectroMAROC		YELLOW	

Click on **OK**

20312912	Highlights Electronics Sdn Bhd	GREEN	Mr. Mar
20339921	TraxTonic Sdn Bhd	YELLOW	Mrs. Ruf
21233572	Somadis	YELLOW	M. Syed
21245278	Maronegoce	BLUE	Mme. Fe
21252947	ElectroMAROC	YELLOW	

Do not tab between fields, as it will not result in good instructions. Always click into a field before entering data. If tab or enter is required to update field content, just include it after your input.

Click on **No.**

10000 The Cannon Group PLC - Customer Card

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City B27 4KT Birmingham

Country/Region Code GB

Click on **Name**

10000 The Cannon Group PLC - Customer Card

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City B27 4KT Birmingham

Country/Region Code GB

Phone No.

Click on **Address**

10000 The Cannon Group PLC - Customer Card

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City B27 4KT Birmingham

Country/Region Code GB

Phone No.

Primary Contact No.

Click on **Post Code**

Click on **City**

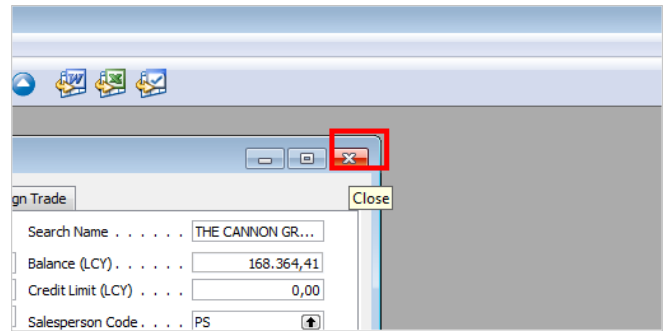
Click **Country/Region Code** lookup

Click on row '**GB**'

Code	Name	Address Format	Cont
DZ	Algeria	Post Code+City	Afte
EE	Estonia	Post Code+City	Afte
EL	Greece	Post Code+City	Afte
ES	Spain	Post Code+City	Afte
FI	Finland	Post Code+City	Afte
FJ	Fiji Islands	City+Post Code	Firs
FR	France	Post Code+City	Afte
GB	Great Britain	City+Post Code	Afte
HR	Croatia	Post Code+City	Afte
HU	Hungary	City+Post Code	Afte
ID	Indonesia	Post Code+City	Afte

Click on **OK**

Close the form **Customer Card**



1.3.3. End recording

Press the two Ctrl keys.

If you are working on a device without two Ctrl keys, please move the mouse cursor to the top left corner of the screen and press Shift + Ctrl.

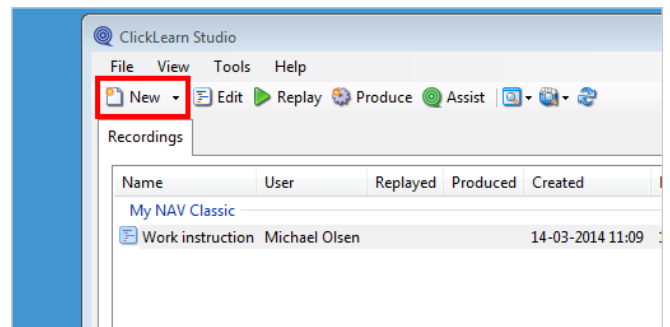
ClickLearn will open a dialog from where you may save the recording. Once the recording is saved, ClickLearn will reopen and you may produce the material or edit it.

Please save your work instruction. It is best to save them on a network drive, so that other users may get access to the recording.

1.4. ClickLearn User Interface

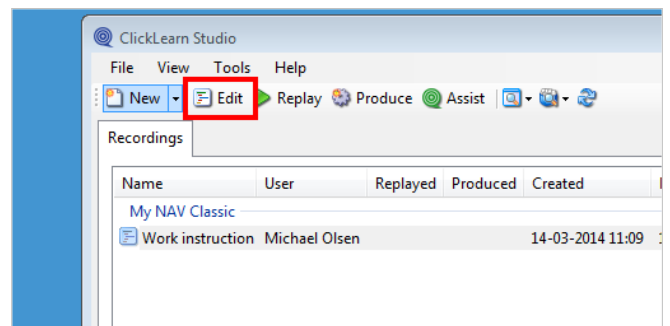
1.4.1. The Toolbar

Move the mouse to the button **New**.



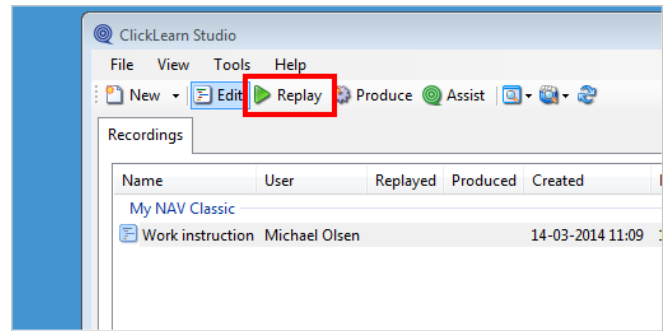
The New button enables you to make a new recording of a work instruction.

Move the mouse to the button **Edit**.



The Edit button enables you to modify a work instruction. You need to select a recording from the list before clicking the button.

Move the mouse to the button **Replay**.

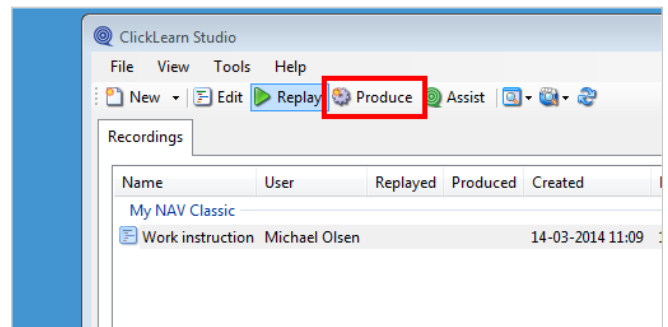


The Replay button enables you to automatically replay a work instruction. You need to select a recording from the list before clicking the button.

Also, please remember that replay will overwrite all screen content in the current recording and collect new screen content while running. If the replay failed, the recording will only have screen content up to the step where it failed. The remaining steps will not have meaningful thumbnail images and rectangles.

Make sure to prepare your system to the Home screen before replaying.

Move the mouse to the button **Produce**.

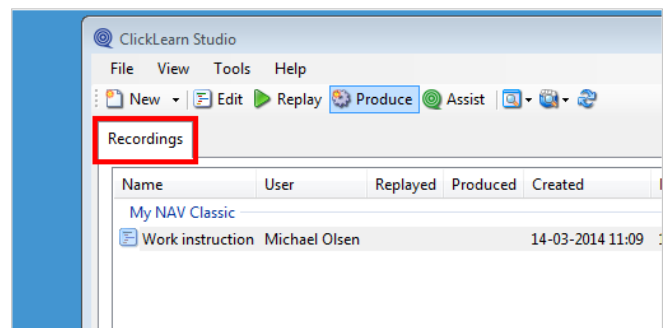


The Produce button enables you to produce a work instruction. You need to select a recording from the list before clicking the button.

The produced material is made according to a template. Please refer to adding a workspace if your produced material does not use the desired template.

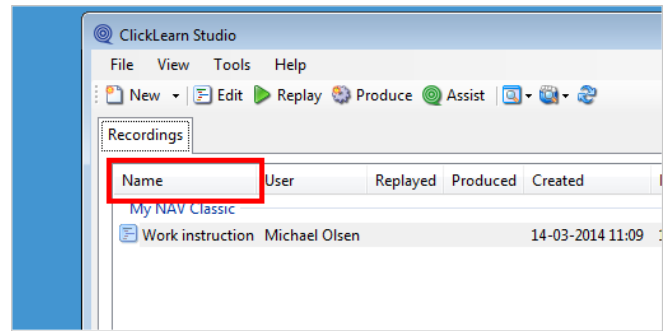
1.4.2. The Recordings tab

Click on the tab **Recordings**.



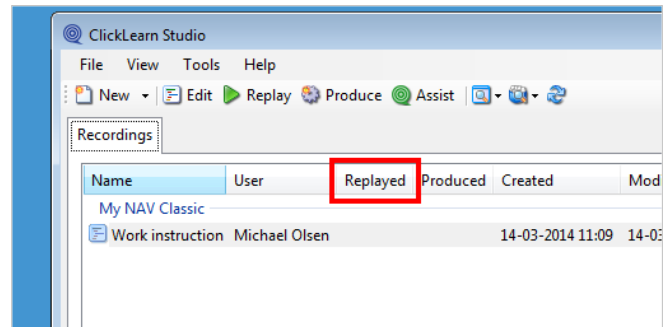
This is the list of your recordings.

Move the mouse to the column header **Name**.



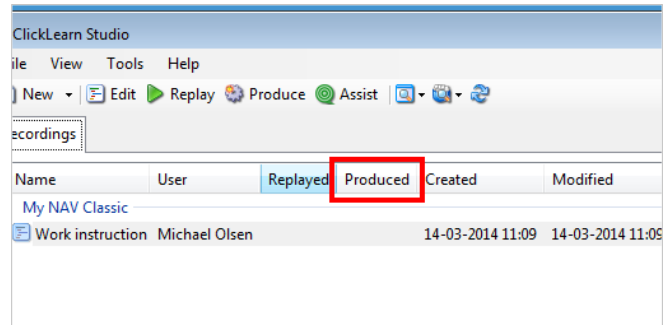
If you click on the recording name in this column, you may rename it.

Move the mouse to the column header **Replayed**.



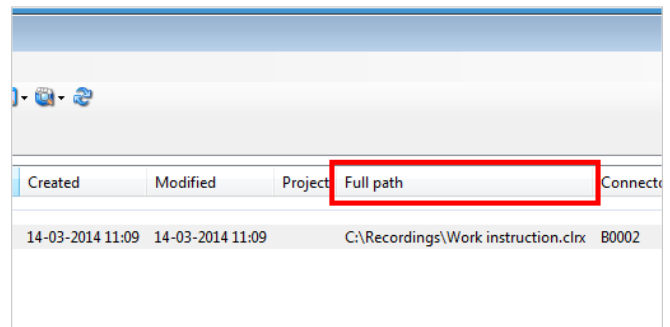
This column indicates if you have replayed the recording.

Move the mouse to the column header **Produced**.



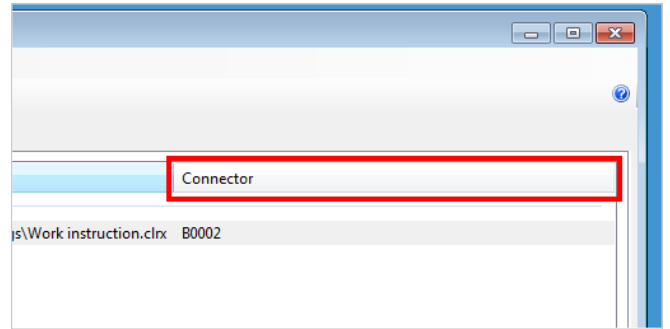
This column indicates when you have produced the material. The produced material is located in a folder named according to the recording name and placed in the same location. Please refer to the full path column for location.

Move the mouse to the column header **Full path**.



This column gives you the full path of the recording. A recording is saved as a .clrx file. From this ClickLearn is able to produce all material.

Move the mouse to the column header **Connector**.



This column indicates which connector was selected when the recording was done.

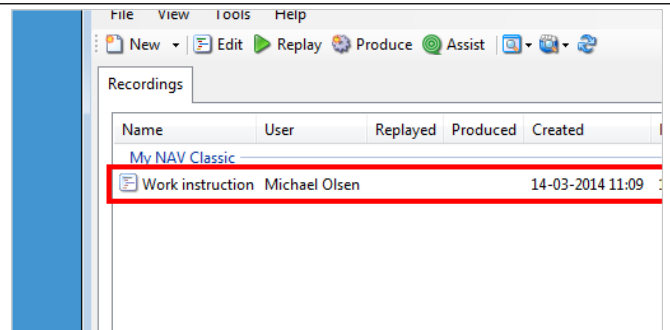
1.5. Produce the work instruction

1.5.1. Select work instructions

It is possible to select one or more recordings to produce.

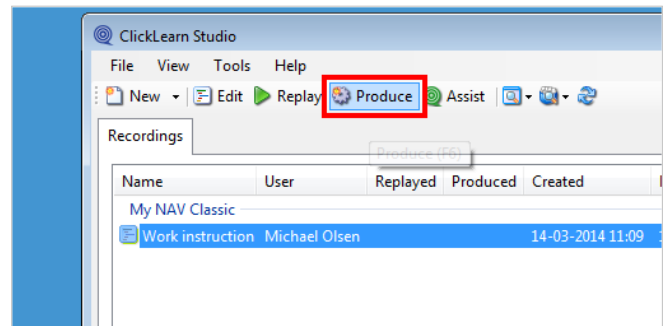
The menu Tools, Preferences will control how much ClickLearn will produce. By default, ClickLearn will produce all types of material but Windows Media Video. The reason is that it may be very time consuming for your PC.

Click on the list element **Work instruction**.



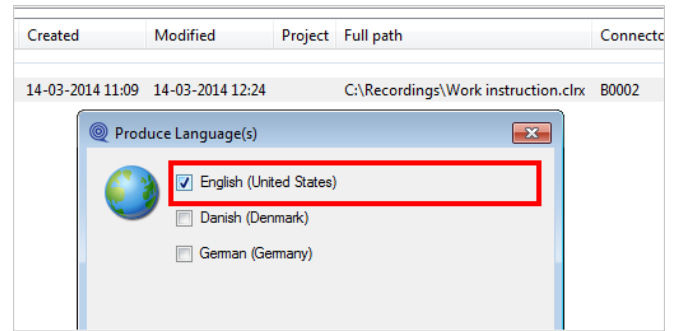
1.5.2. Produce

Click on the button **Produce**.

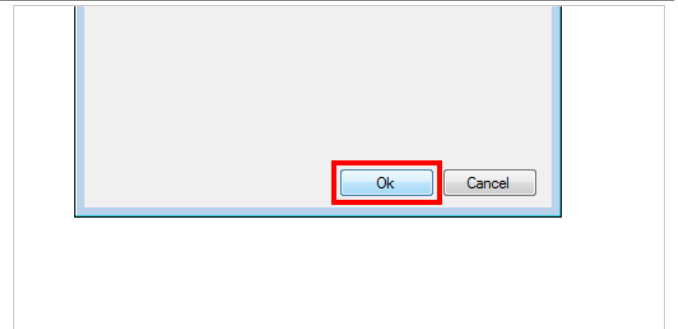


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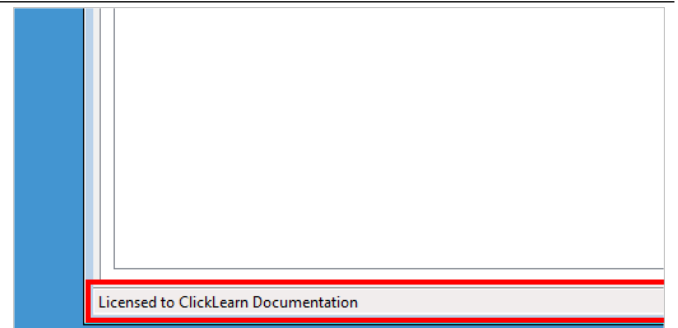
Click on the checkbox **English (United States)**.



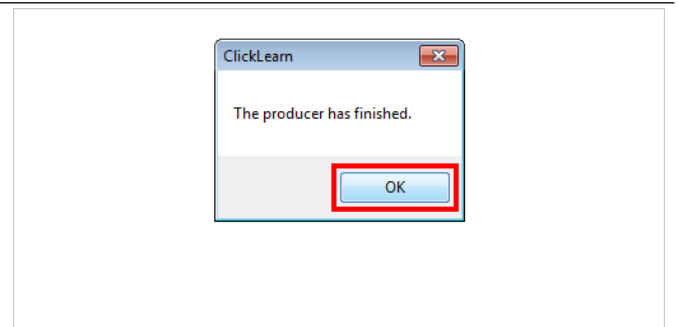
Click on the button **OK**.



While the producer is working, the progress will be shown in the status bar of ClickLearn.



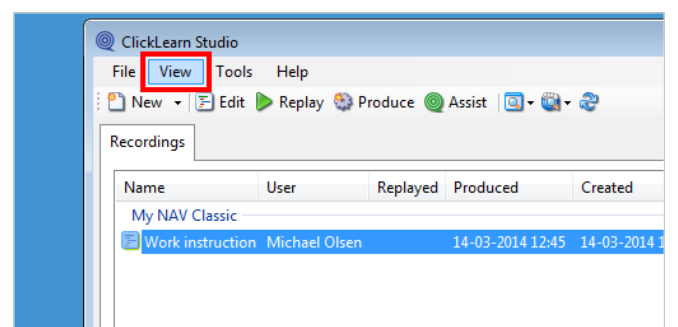
Click on the button **OK**.



1.5.3. The produced material

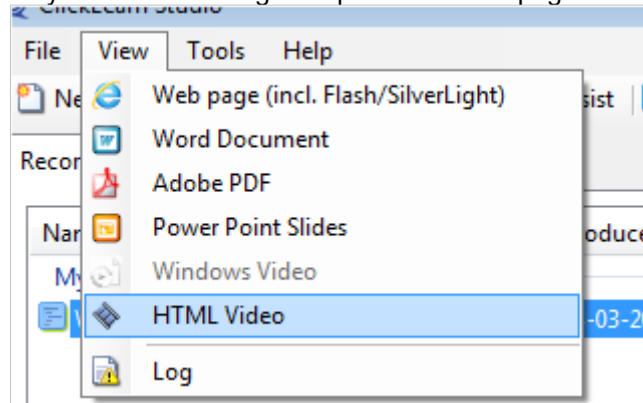
For the current selected recording, you may view the produced material.

Click on the menu **View**.

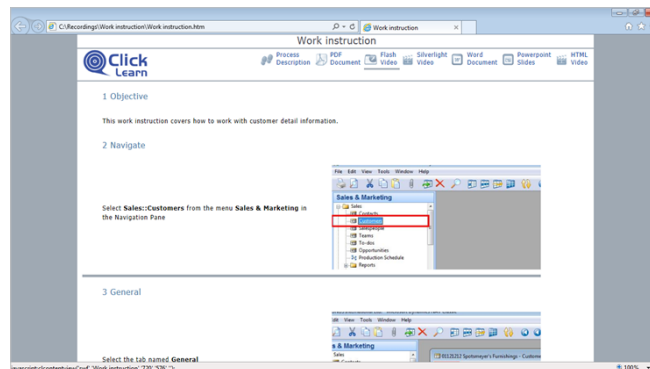
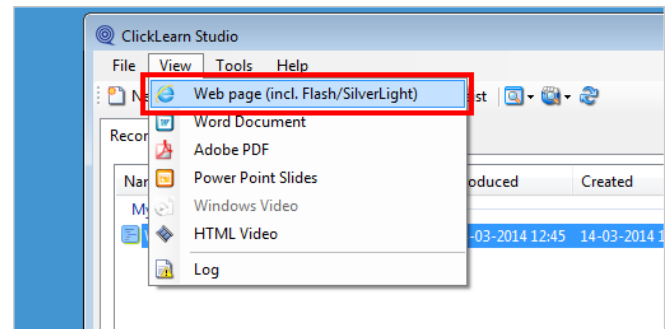


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The view menu will provide instant access to some of the produced material. Other produces material, such as Flash and SilverLight video, may be access through the produced Web page.



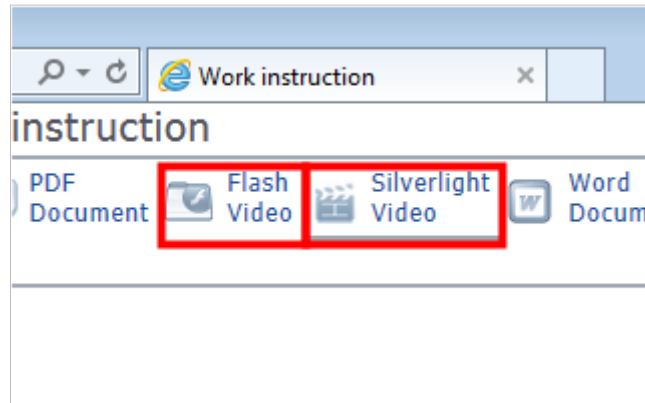
Click on the menu **Web page (incl. Flash/SilverLight)**.



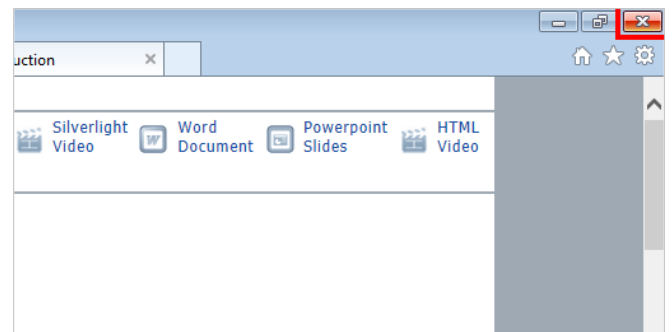
The produced web page

On the web page, you have access to the two video formats.

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Click on the button **Close**.



1.6. Technical support

1.6.1. ClickLearn Support Team

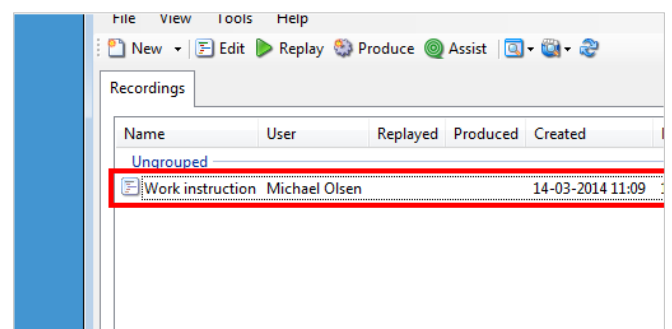
When you have questions or technical issues regarding your work instructions ClickLearn wants to support you. To provide the best and fastest support we advise you to use our Technical Support function.

1.6.2. Send support mail

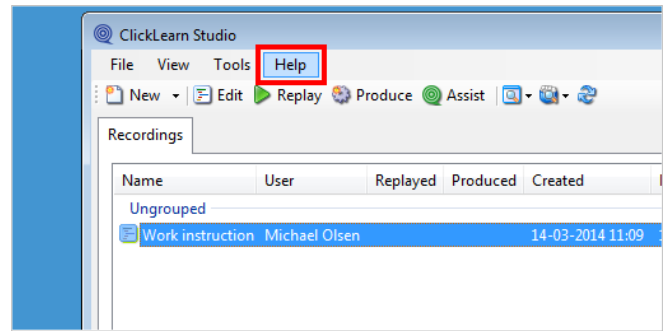
Support questions often have to do with one or more recordings you have created using ClickLearn.

Instead of adding many screen shots to the support mail, just select one or more recordings, which will include what we need to provide support.

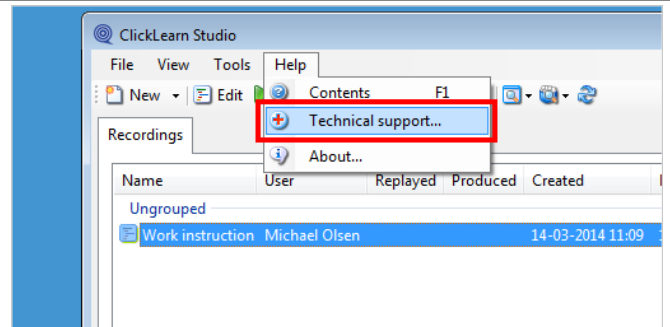
Click on the list element **Work instruction**.



Click on the menu **Help**.



Click on the menu **Technical support...**



Please note the following fields.

You may alter the email address if you would like to send it to a co-worker.

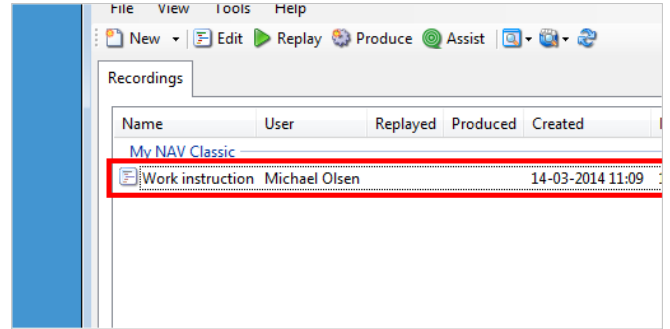
- Click on the input field **Send email to**.
- Click on the input field **Attach file**.
- Click on the input field **Subject**.

1. Click on the input field **Description**. - Enter a **description**.
2. Click on the button **OK**.

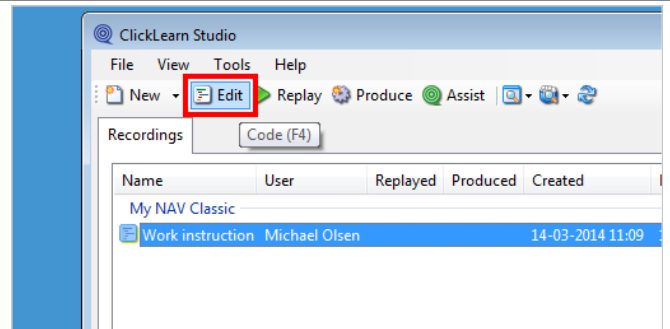
1.7. Edit work instruction

1.7.1. Select a work instruction

Click on the list element **Work instruction**.

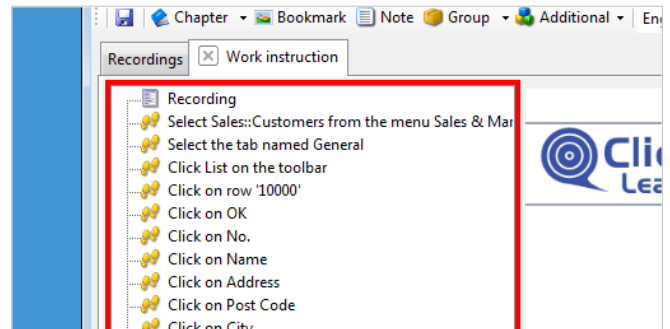


Click on the button **Edit**.

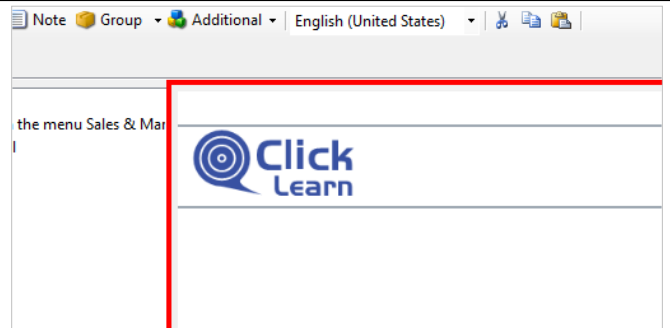


1.7.2. The structure of the editor

The left side of the editor is the structure of the work instruction.



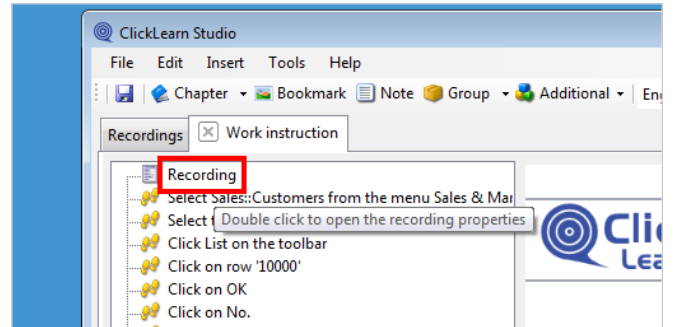
The right side is a preview of how the final work instruction will look.



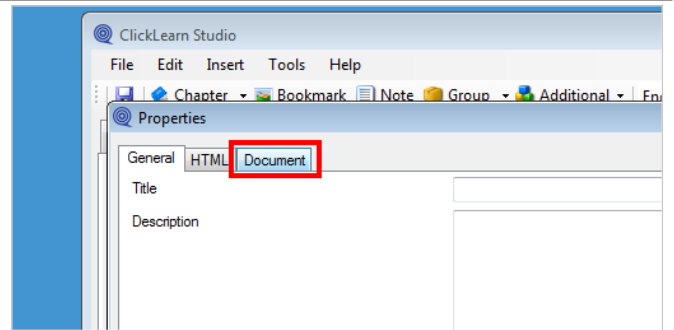
The preview is dependent on which editor role is selected. The role may be selected on the top right part of the editor toolbar.

1.7.3. Meta data

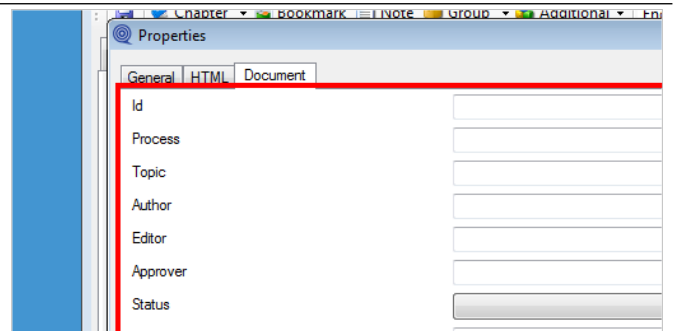
Double click on the folder **Recording**.



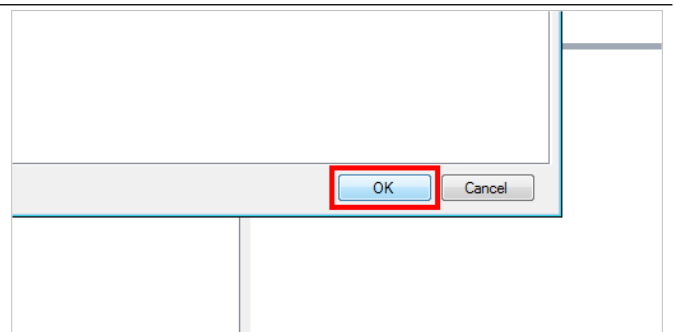
Click on the tab **Document**.



This is the meta data for a recording.
The meta data may be added automatically to the produced HTML and Word document if the template is setup for it.

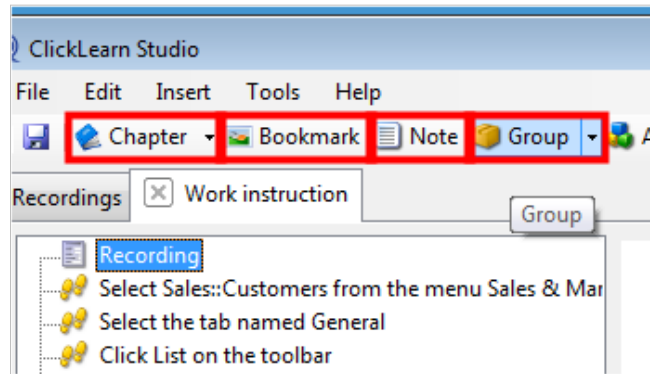


Click on the button **OK**.



1.7.4. Insert elements

The editor provides a number of elements, which may be inserted in a work instruction.

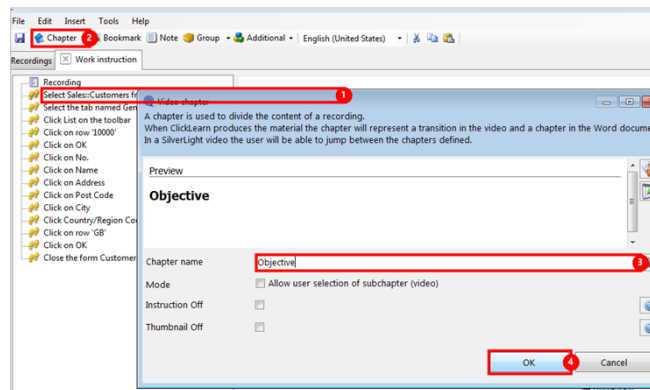


Before inserting an element, please remember to select a step. The element will be inserted before the selected step.

To insert an element at the bottom of a recording, select the first step named Recording. To insert an element at the end of a group, select the last group step and ClickLearn will ask if you want to insert after the step or not.

1.7.5. Chapter

The chapter button is a split button. You may click the split button in order to insert subchapters instead of chapters.

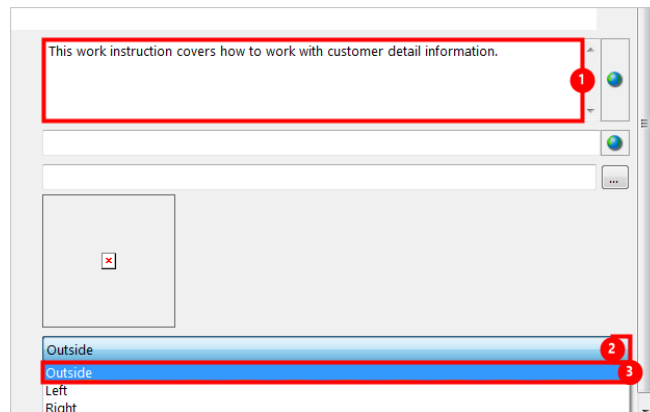
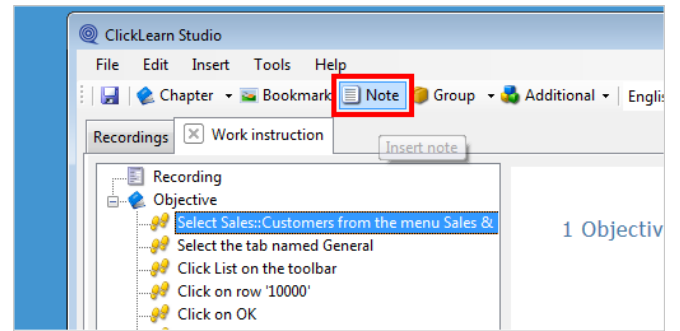


1. Click on the folder **Select Sales::Customers from the menu Sales & Marketing in the Navigation Pane**.
2. Click on the button **Chapter**.
3. Click on the input field **Chapter name**. - Enter **Chapter name**.
4. Click on the button **OK**.

1.7.6. Note

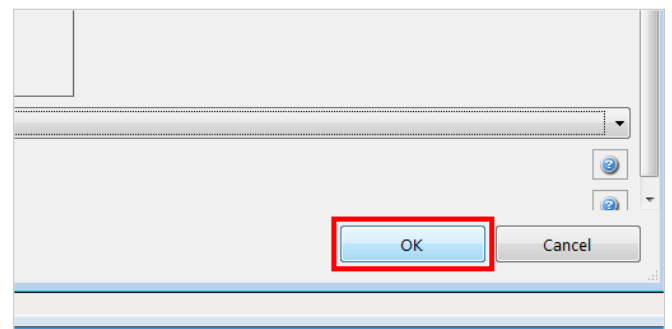
A note may be placed in different ways in the final document. The template operates with two placements, left or right. Only if you choose placement left, the note will be an insight note. Placement outside is therefore equal to placement right.

Click on the button **Note**.

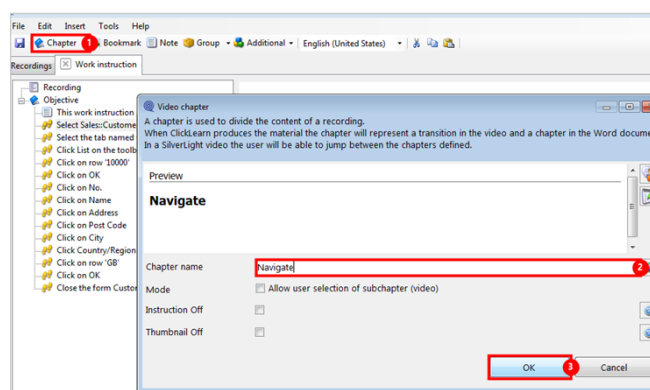


1. Click on the input field **Notes**. - Enter **Notes**.
2. Click on the button **Open**.
3. Click on the list element **Outside**.

Click on the button **OK**.

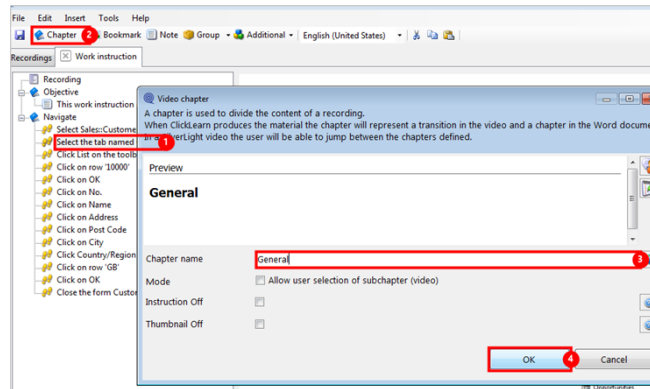


1.7.7. More chapters

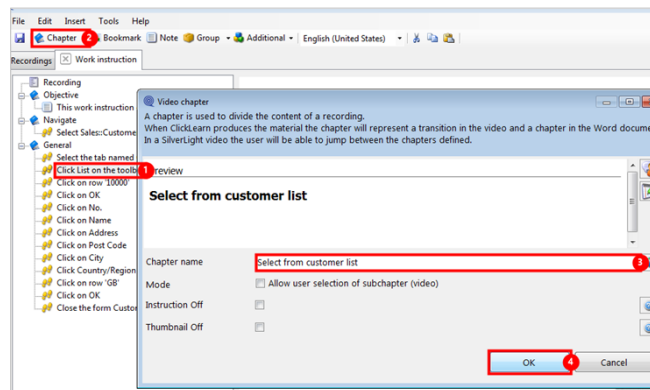


1. Click on the button **Chapter**.

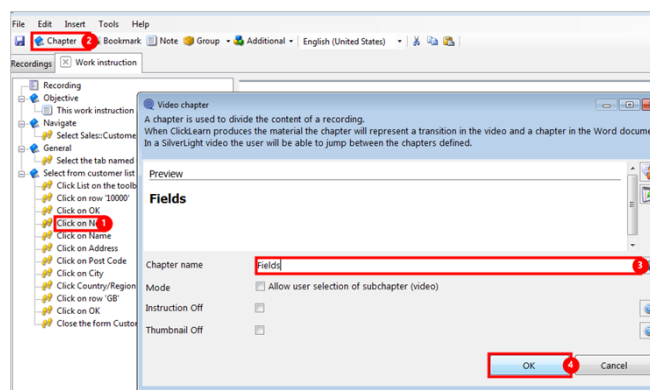
2. Click on the input field **Chapter name**. - Enter **Chapter name**.
3. Click on the button **OK**.



1. Click on the folder **Select the tab named General**.
2. Click on the button **Chapter**.
3. Click on the input field **Chapter name**. - Enter **Chapter name**.
4. Click on the button **OK**.



1. Click on the folder **Click List on the toolbar**.
2. Click on the button **Chapter**.
3. Click on the input field **Chapter name**. - Enter **Chapter name**.
4. Click on the button **OK**.

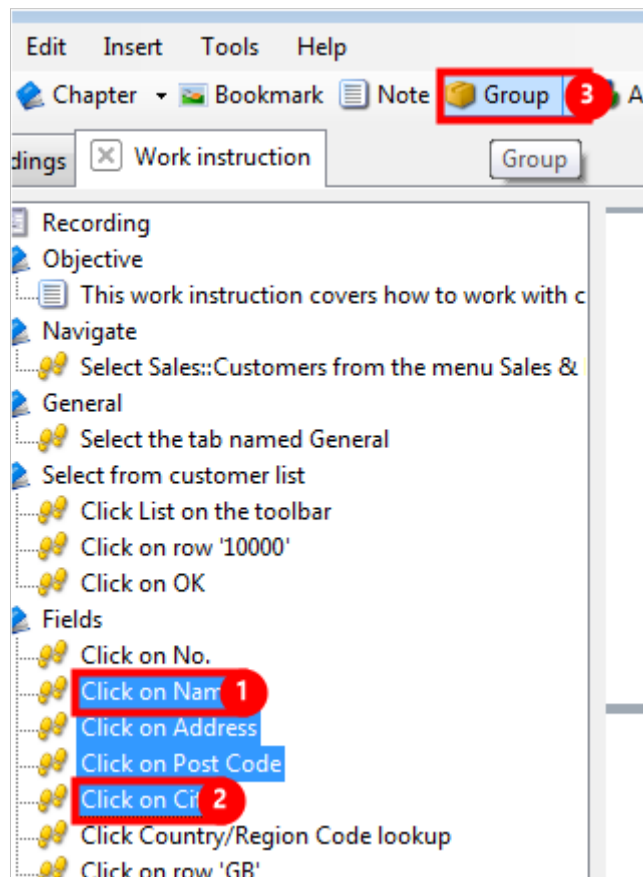


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1. Click on the folder **Click on No.**
2. Click on the button **Chapter**.
3. Click on the input field **Chapter name.** - Enter **Chapter name.**
4. Click on the button **OK.**

1.7.8. Group

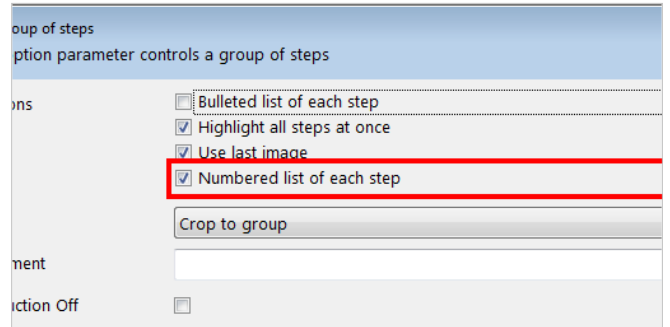
Notes within a group will be collected into one, and inserted into the produced document according to the template. This means, that the placement on a note will be ignored. To have an insight note in connection with a group, place it before or after the group.



1. Click on the folder **Click on Name.**
2. Press and hold the **Shift** key down. Click on the folder **Click on City.**
3. Click on the button **Group.**

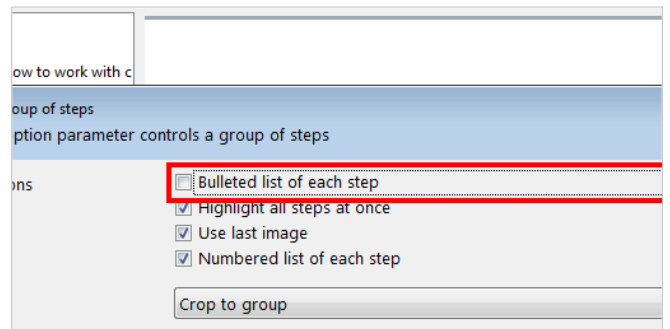
1.7.8.1. Group options

Move the mouse to the checkbox **Numbered list of each step** each step.



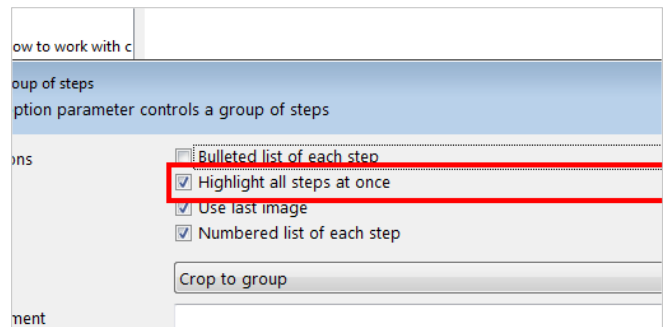
This option will insert a numbered list of all steps within the group. If a step is followed by a keyboard input, the two steps will be merged into one.

Move the mouse to the checkbox **Bulleted list of each step** each step.



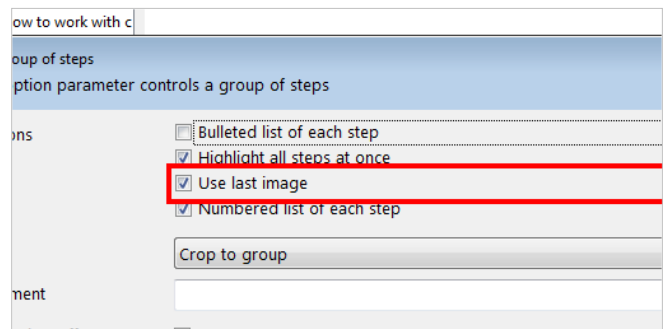
This option will insert a bulleted list of all steps within the group. If both this option and the numbered list is checked it will be a bulleted list.

Move the mouse to the checkbox **Highlight all steps at once** at once.



This option will highlight all step rectangles in the image. If it is a numbered list, each rectangle will be numbered.

Move the mouse to the checkbox **Use last image**.



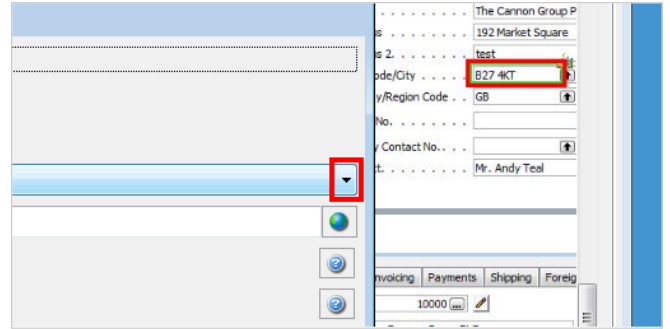
This option will use the last image of the group. If not checked the first image of the group is used.

If the steps within the group is putting data into various fields, the last image will display all data entered. If not using the last image, no data will be displayed in the

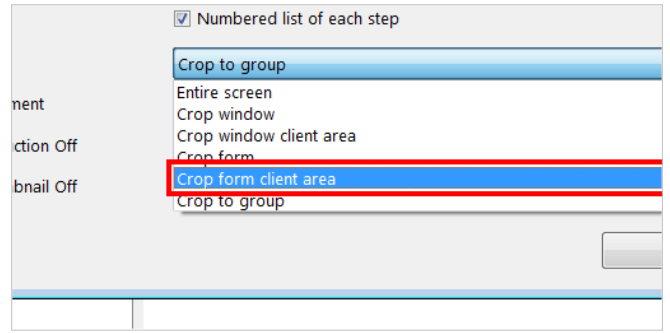
image.

1.7.8.2. Cropping the image

Click on the button **Open**.

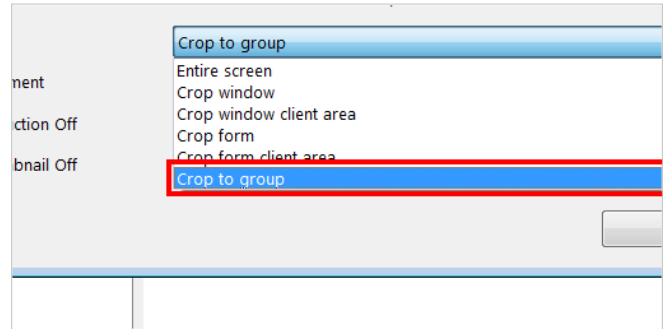


Move the mouse to the list element **Crop form client area**.



The form client area is equal to the currently active form.

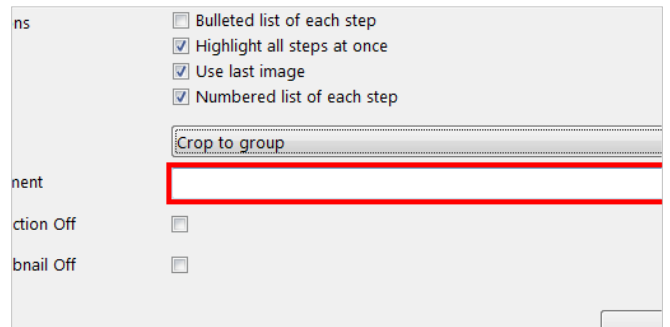
Click on the list element **Crop to group**.



1.7.8.3. Comment your group

The comment field of a group will be displayed in the left side structure of the editor.

Click on the input field **Comment**.



Enter **Comment**.

Click on the button **OK**.

1.7.9. Data driven steps

Data driven steps are steps that either select data from combo boxes, lists, data grids or by entering data using the keyboard.

These are important when a work instruction needs to be replayed back on the system at some point.

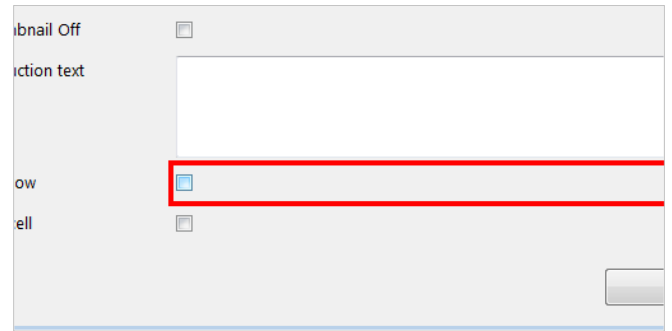
1.7.9.1. Allow any row

Double click on the folder **Click on row 'GB'**.

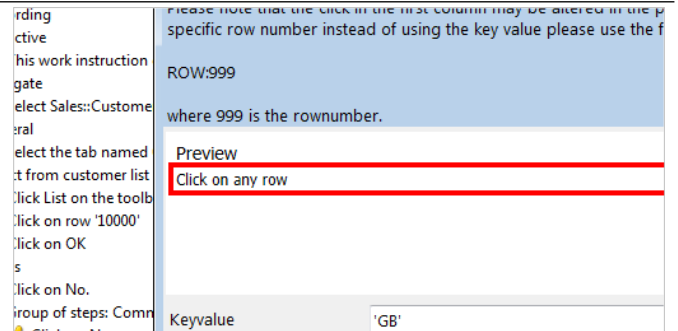
Move the mouse to **Click on row 'GB'**

Notice how the instruction refers to a specific data value.

Click on the checkbox **Any row**.



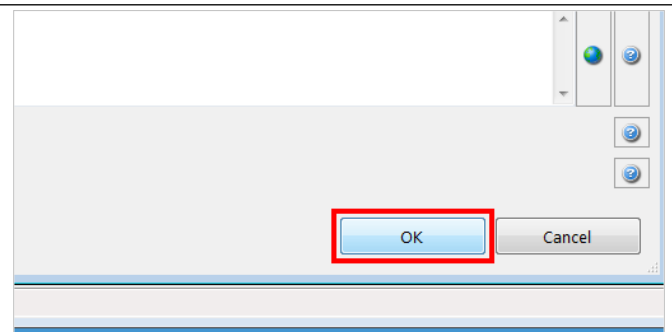
Move the mouse to **Click on any row**



Notice how the any row has transformed the instruction.

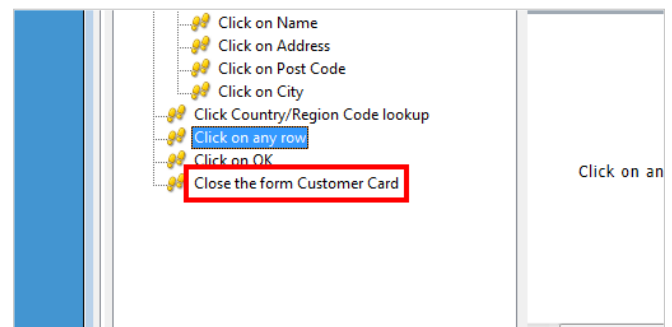
This will also affect ClickLearn Assist, so that the user may select any value from the list. It will not affect the replay, which will still use the data value.

Click on the button **OK**.

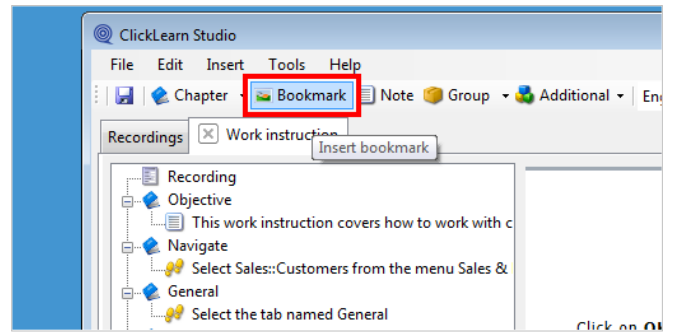


1.7.10. Bookmark

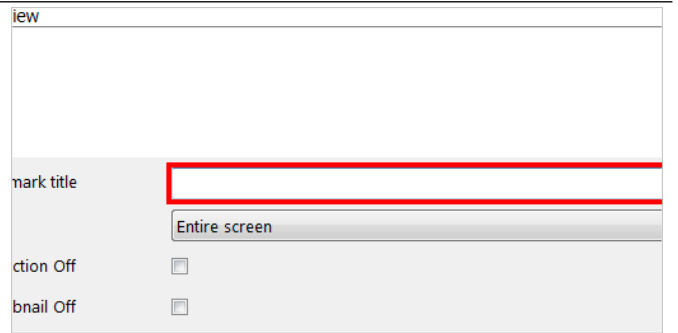
Click on the folder **Close the form Customer Card**.



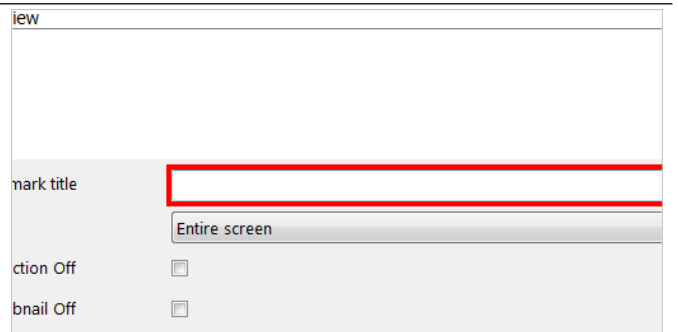
Click on the button **Bookmark**.



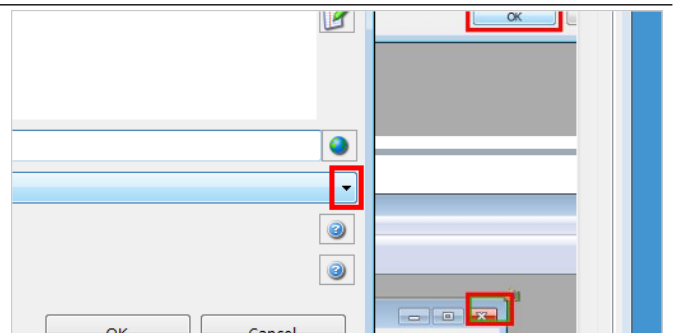
Click on the input field **Bookmark title**.



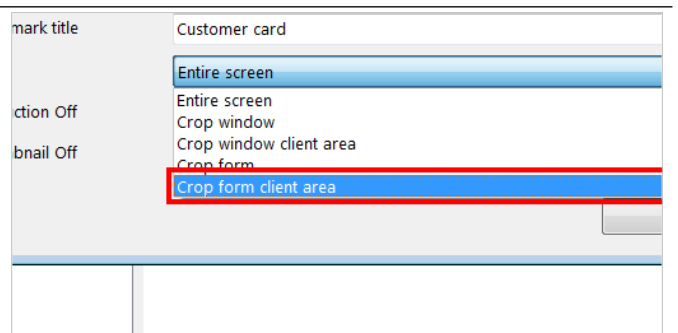
Enter **Bookmark title**.



Click on the button **Open**.



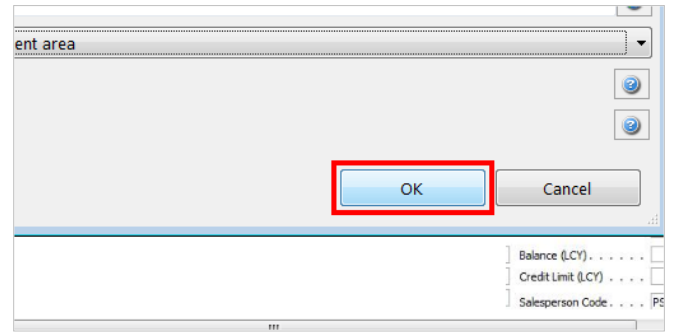
Click on the list element **Crop form client area**.



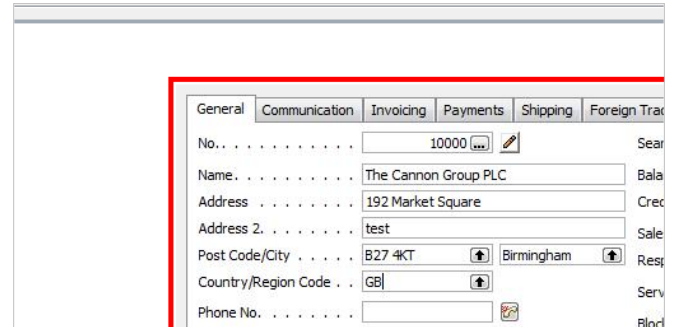
The form client area is equal to the currently active form.

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Click on the button **OK**.

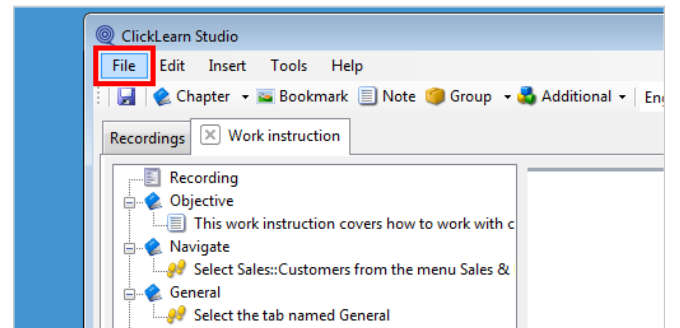


This is the bookmark cropped according to the work area.



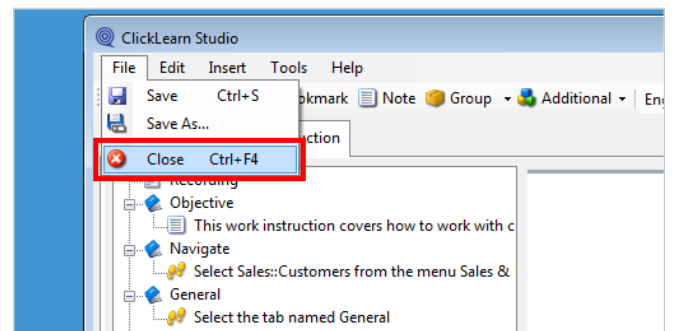
1.7.11. Save your work

Click on the menu **File**.

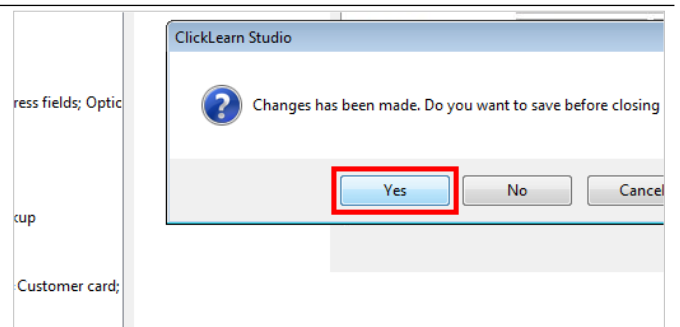


If you select the menu item Save As, you are able to save a copy of your work instruction.

Click on the menu **Close**.

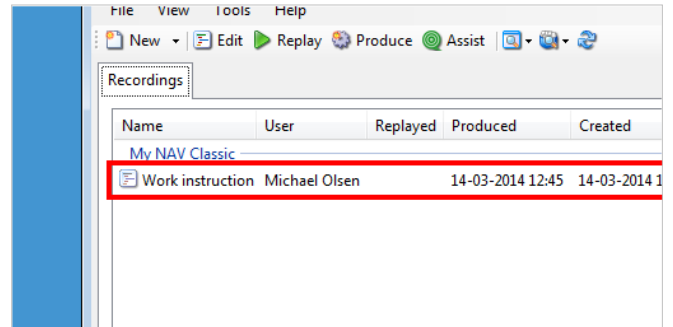


Click on the button **Yes**.

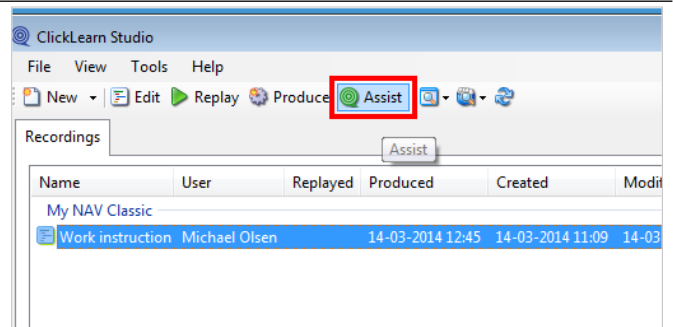


1.8. Onscreen Assistance

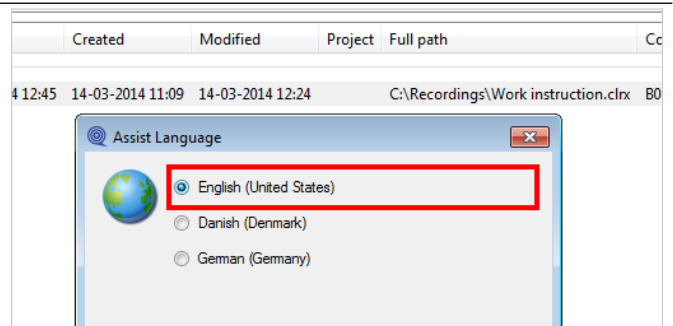
Click on the list element **Work instruction**.



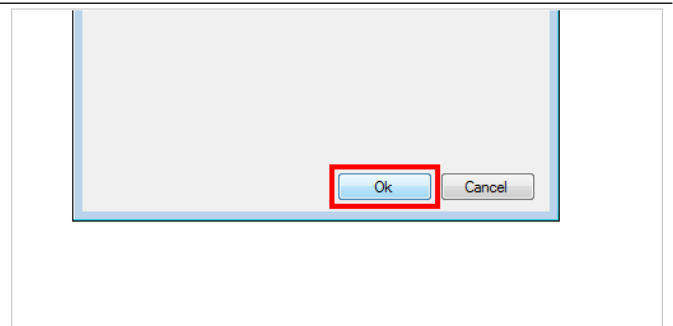
Click on the button **Assist**.



Click on the radio button **English (United States)**.

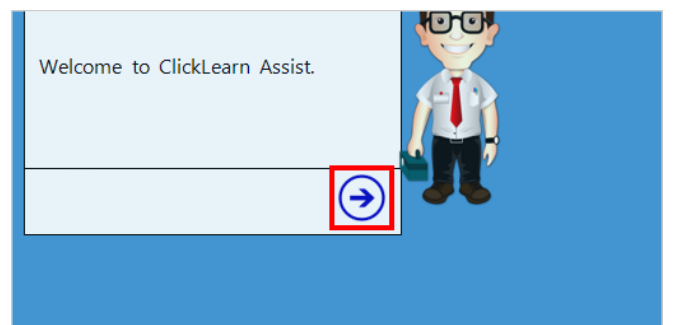


Click on the button **Ok**.



Assist will start with a welcome dialog. You may advance to the next step, or wait for 5 seconds, where Assist will automatically go next.

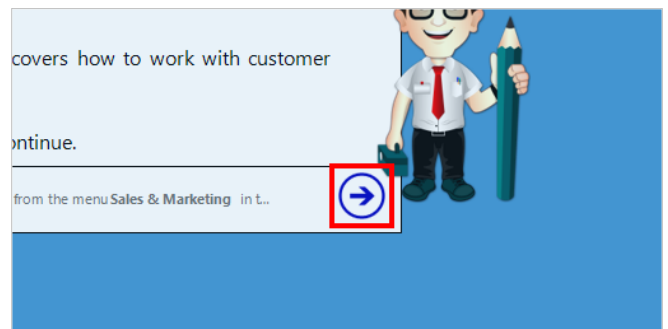
Click on the button **Next**.



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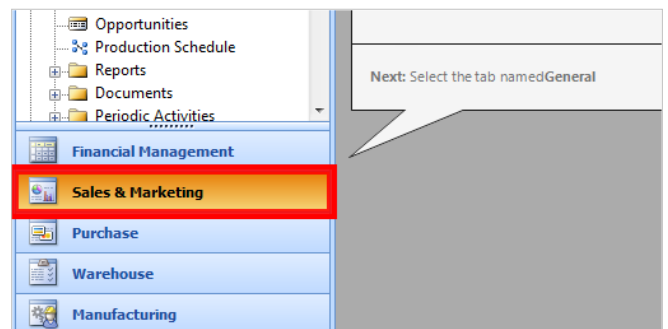
As edited in the work instruction, the inserted note will appear, and in the header, the current chapter name is displayed. Notes will force the user to click next in order to advance to the next step.

Click on the button **Next**.

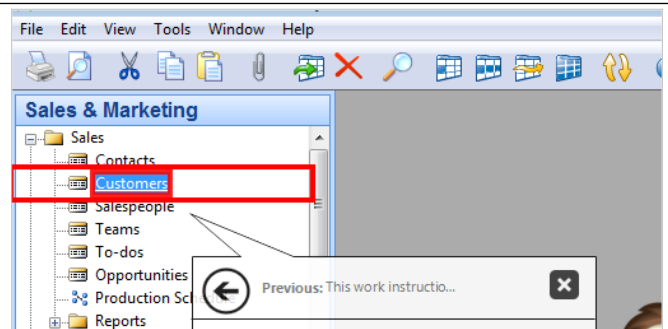


Assist will now ask the user to click with the rectangle for each step recorded in the work instruction. As the user performs the click it is done in the live system, and therefore the user will actually perform the task.

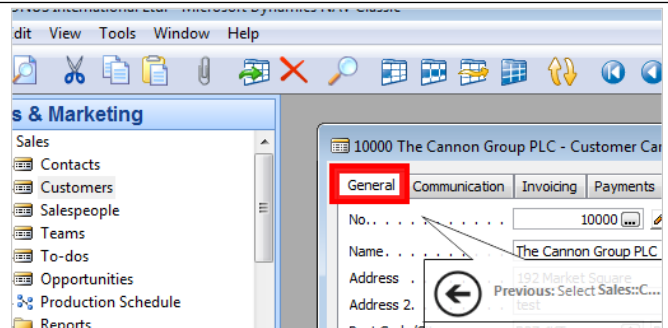
Select menu button **Sales & Marketing** in the Navigation Pane



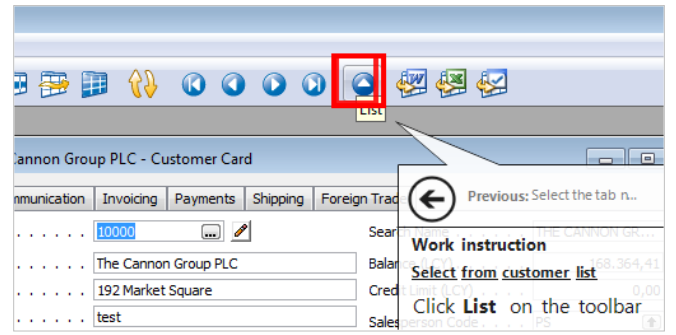
Select **Sales, Customers** from the menu **Sales & Marketing** in the Navigation Pane



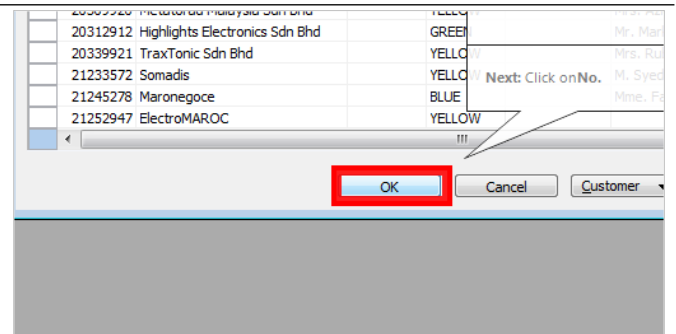
Select the tab named **General**



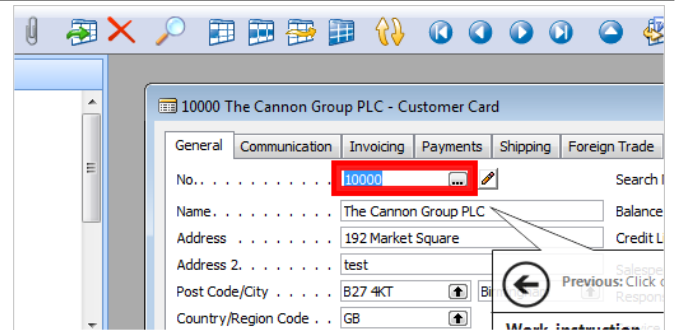
Click **List** on the toolbar



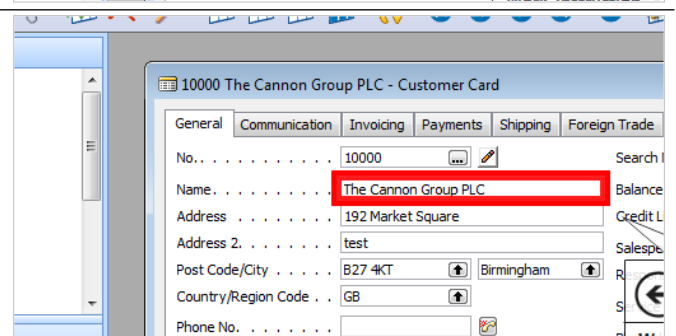
Click on **OK**



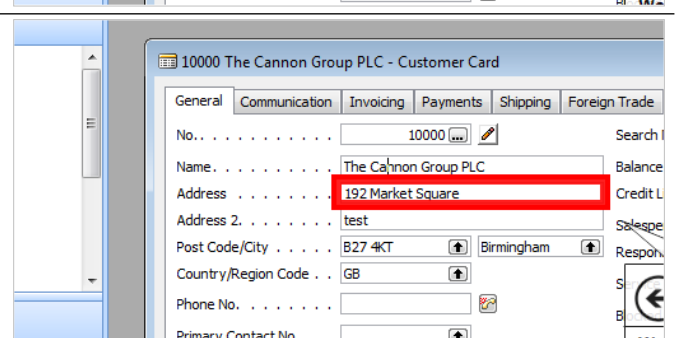
Click on **No.**



Click on **Name**



Click on **Address**



Click on **Post Code**

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City **B27 4KT** Birmingham

Country/Region Code GB

Phone No.

Primary Contact No.

Contact. Mr. Andy Teal

Click on **City**

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City B27 4KT **Birmingham**

Country/Region Code GB

Phone No.

Primary Contact No.

Contact. Mr. Andy Teal

Click **Country/Region Code** lookup

General Communication Invoicing Payments Shipping Foreign Trade

No. 10000

Name. The Cannon Group PLC

Address 192 Market Square

Address 2. test

Post Code/City B27 4KT Birmingham

Country/Region Code GB

Phone No.

Primary Contact No.

Contact. Mr. Andy Teal

Click on **OK**

FI	Finland
FJ	Fiji Islands
FR	France
GB	Great Britain
HR	Croatia
HU	Hungary
ID	Indonesia

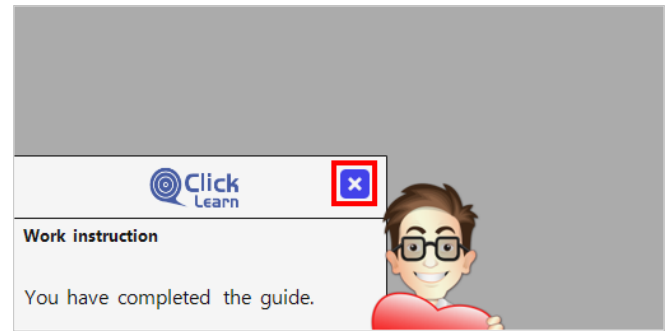
OK Cancel Country/...

Close the form **Customer Card**

Customer Card window closed.

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Click on the button **Close**.



2. Books and Shelves

2.1. Books

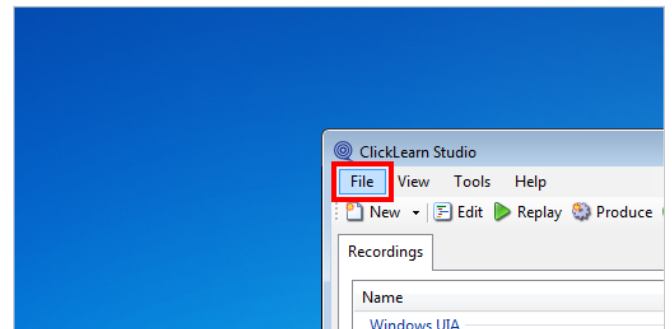
2.1.1. Introduction

A book provides a way to combine recordings into a user friendly web site, allowing the user to browse between recordings.

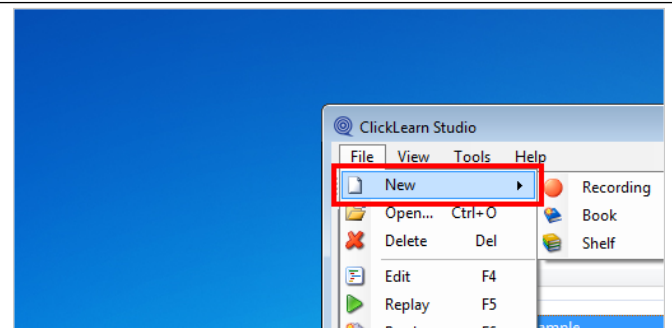
At the same time, the book will produce a single Word and PDF document, should you choose to produce them.

2.1.2. How to create a book

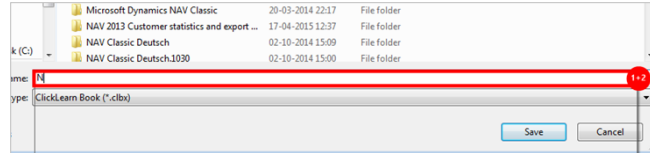
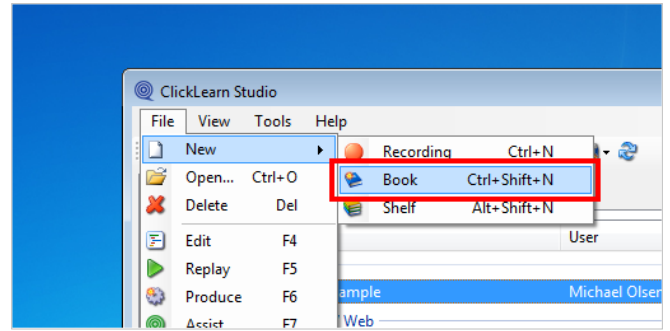
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **New**.

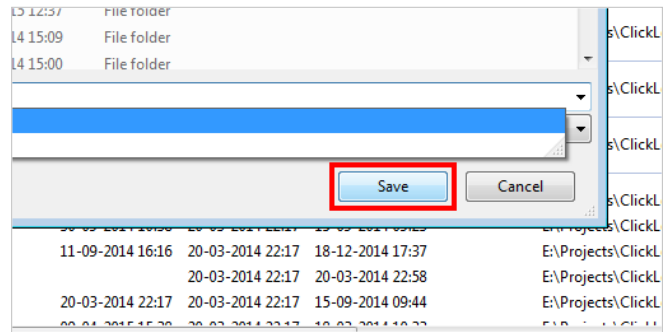


Click on the menu **Book**.



1. Click on the input field **File name:**. You may also press **ALT+N**. - Press **CTRL+a**.
2. Enter **File name:**.

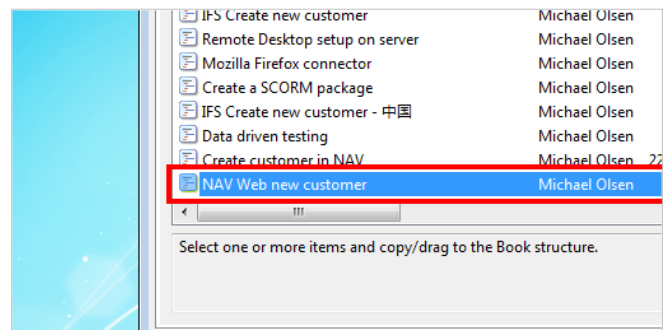
Click on the button **Save**.
You may also press **Alt+S**.



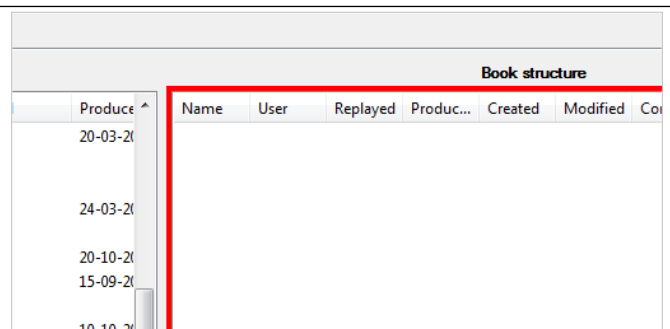
2.1.3. Add recordings

It is simple drag and drop, to add recordings to the book structure.

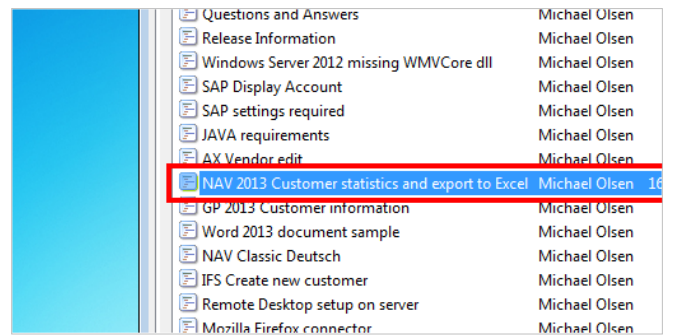
Click and hold the left mouse button on the list element **NAV Web new customer**.



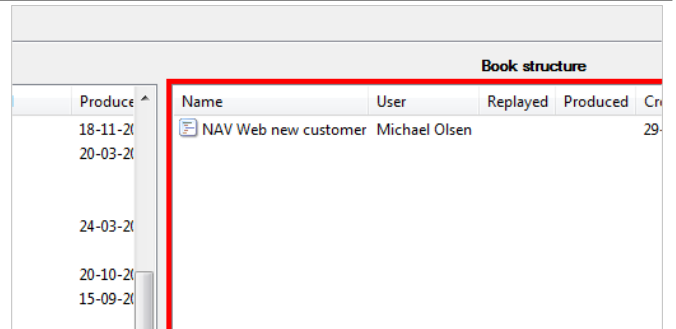
Release the left mouse button on the list **Book structure**.



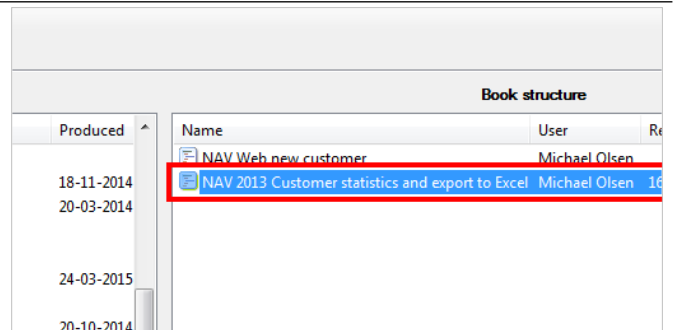
Click and hold the left mouse button on the list element **NAV 2013 Customer statistics and export to Excel**.



Release the left mouse button on the list **Book structure**.

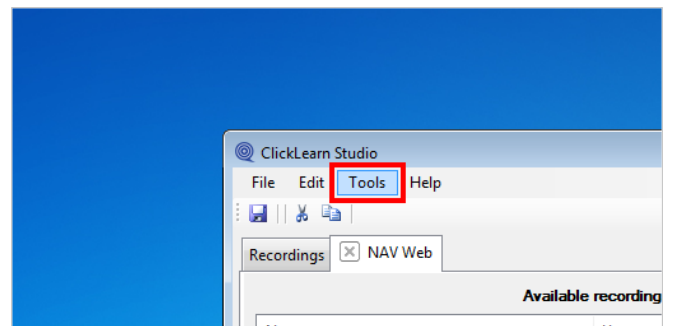


Click on the list element **NAV 2013 Customer statistics and export to Excel**.



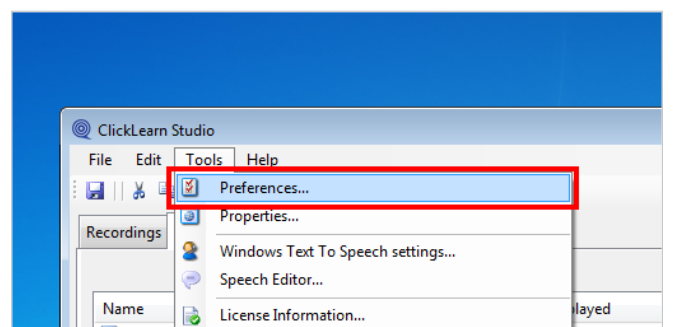
You may control the sequence within the book, by dragging and dropping with the book structure list.

Click on the menu **Tools**.



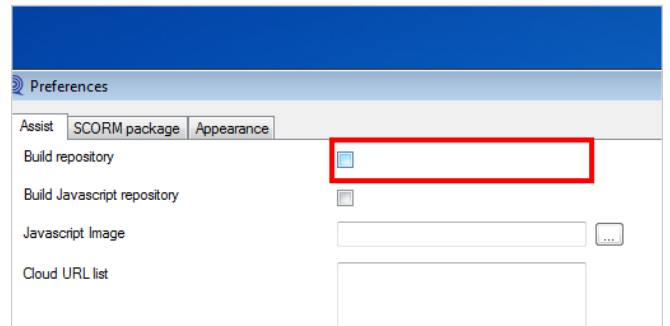
2.1.4. Preferences

Click on the menu **Preferences...**



2.1.4.1. ClickLearn Assist

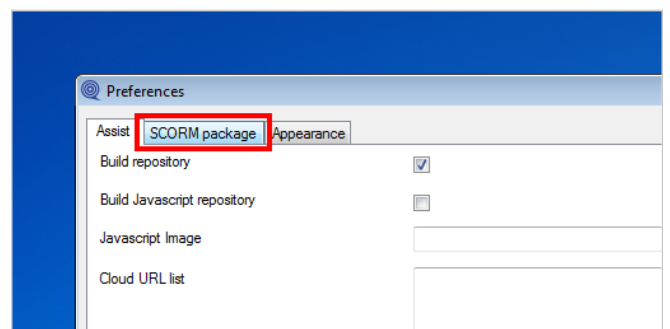
Click on the checkbox **Build repository**.



You may set this checkmark in order to produce the required repository for ClickLearn Assist.

2.1.4.2. SCORM and LMS

Click on the tab **SCORM package**.



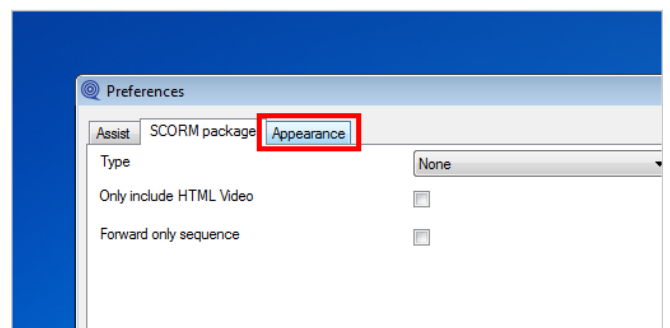
Please refer to the book named "SCORM and LMS".

2.1.4.3. Appearance

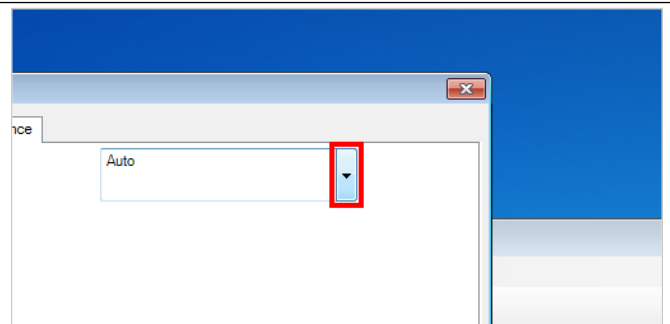
The icon option is used if you create a shelf. Then, each book will be represented on the front page of the shelf with its name and icon.

If you do not set an icon, ClickLearn will automatically choose one according to the name of the book.

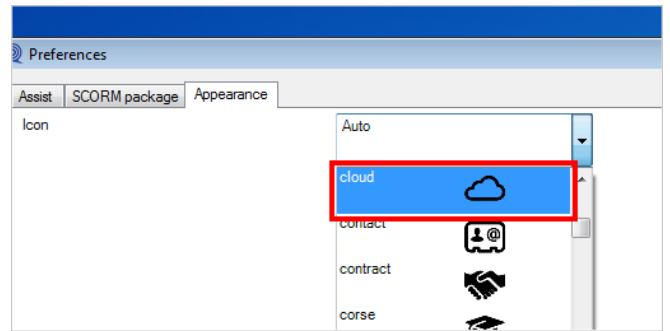
Click on the tab **Appearance**.



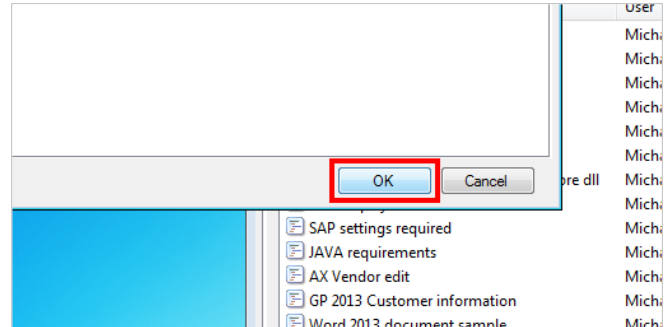
Click on the button **Open**.
You may also press **Alt+Down Arrow**.



Click on the list element **ICON_CLOUD,cloud**.

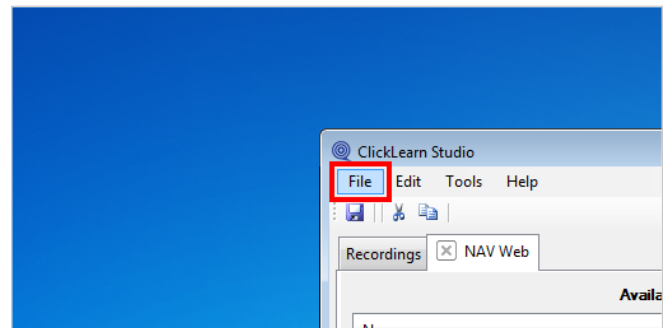


Click on the button **OK**.
You may also press **Alt+O**.

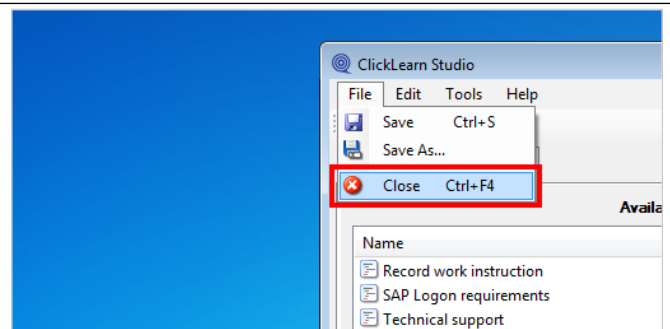


2.1.5. Save and produce

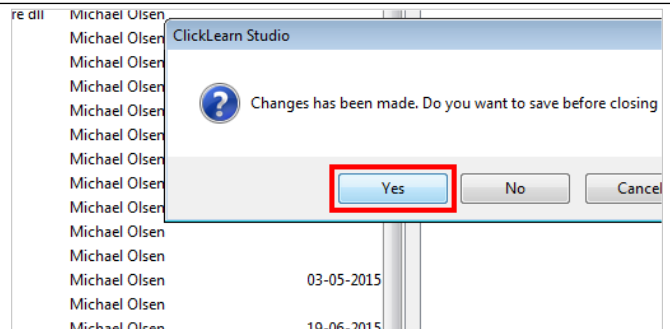
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

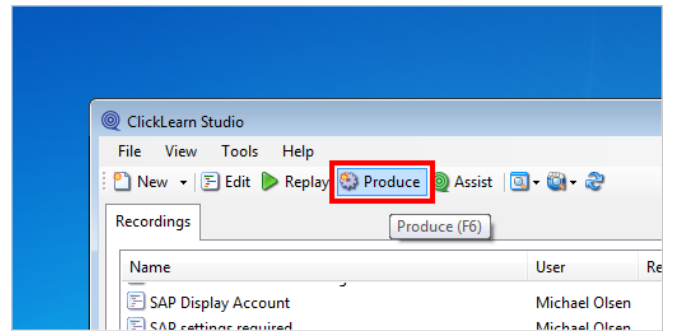


Click on the button **Yes**.
You may also press **Alt+Y**.

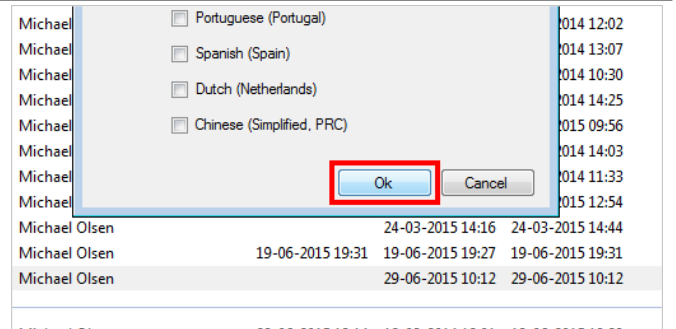


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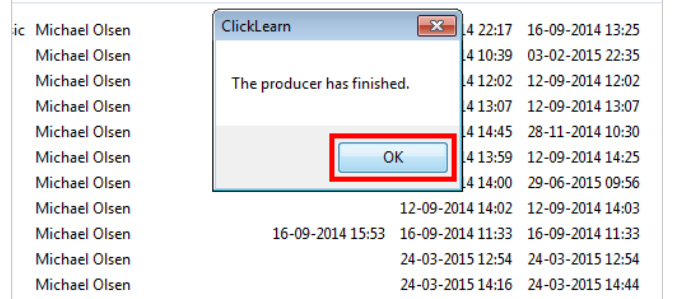
Click on the button **Produce**.
You may also press **Alt+U**.



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

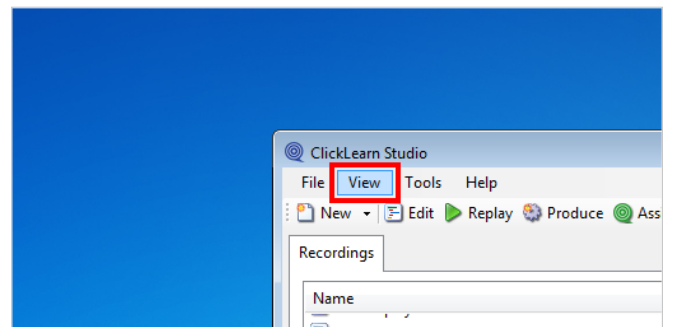


Click on the button **OK**.

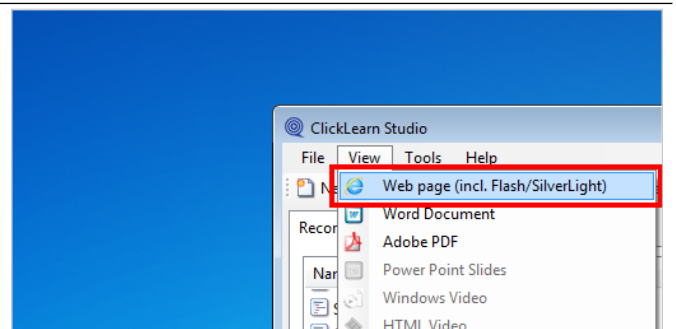


2.1.6. The result

Click on the menu **View**.
You may also press **Alt+V**.



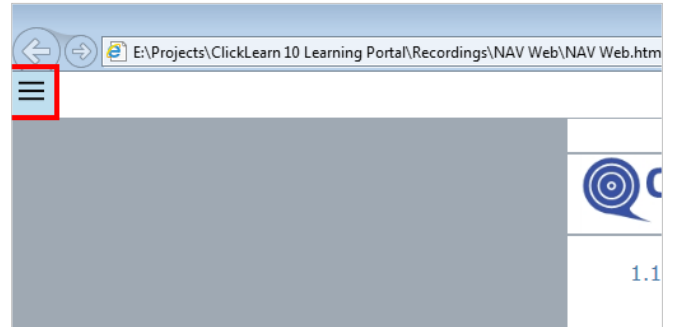
Click on the menu **Web page (incl. Flash/SilverLight)**.



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2.1.6.1. Menu structure

Click on the menu icon.



The menu icon gives you access to the recordings in the book.

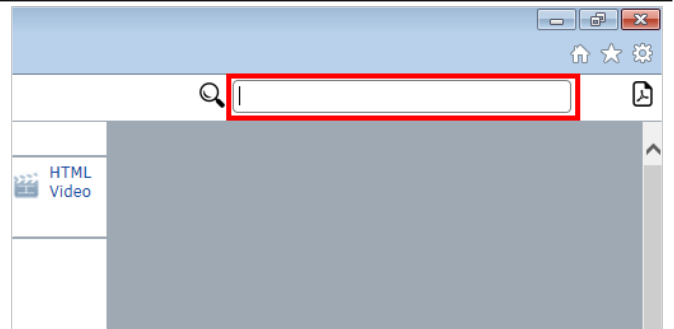
2.1.6.2. Search

The book produces a full word index of all recordings, which allows you to search easily in all content.

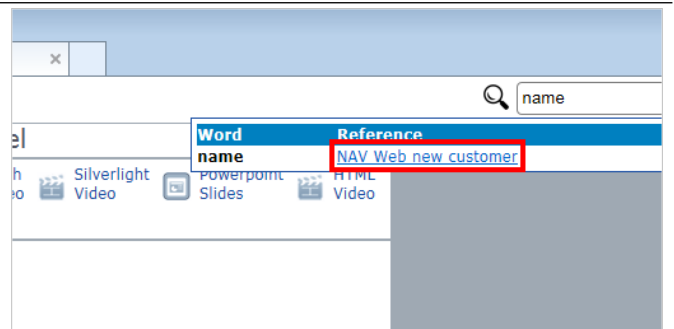
Click on the input field



Enter the text to search for.

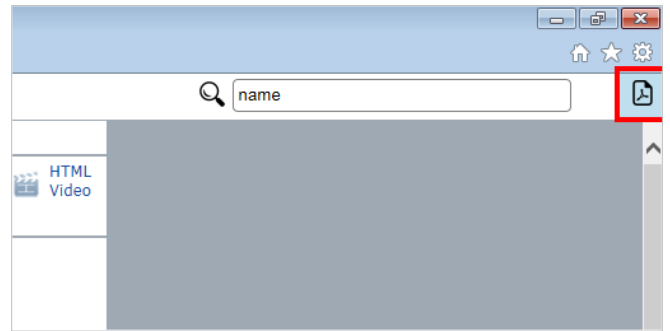


Click on the link **NAV Web new customer**



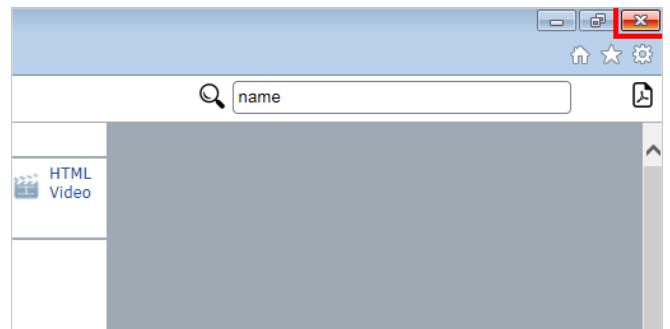
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Move the mouse to the PDF icon.



The user gets access to the complete book as one single PDF document.

Click on the button **Close**.



2.2. Shelves

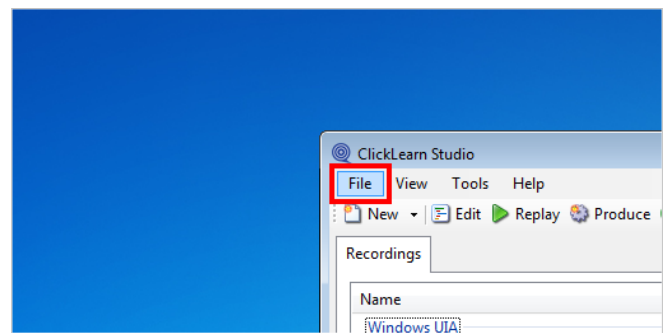
2.2.1. Introduction

A shelf provides a way to combine books into a user friendly web site, allowing the user to get a complete learning portal.

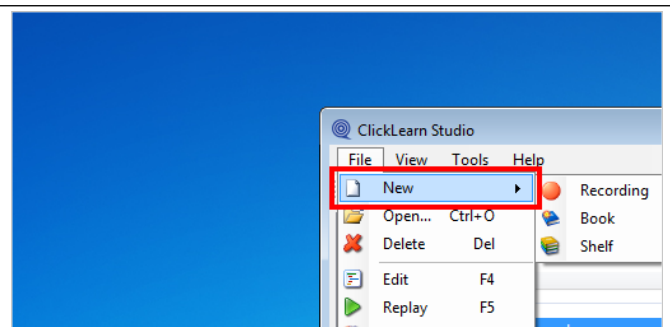
At the same time, the shelf will produce a single Word and PDF document, should you choose to produce them.

2.2.2. How to create a shelf

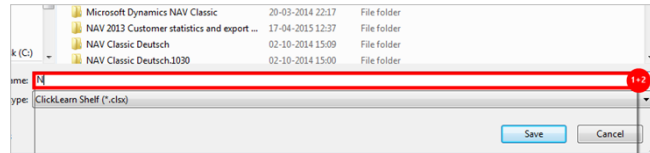
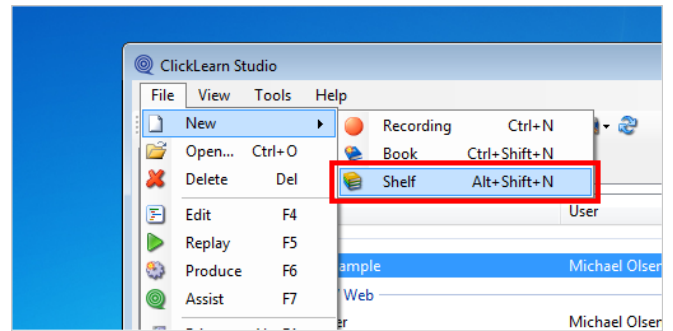
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **New**.

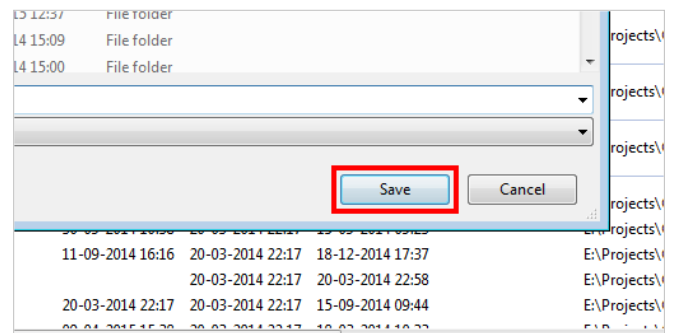


Click on the menu **Shelf**.



1. Click on the input field **File name:**. You may also press **ALT+N**. - Press **CTRL+a**.
2. Enter **File name:**.

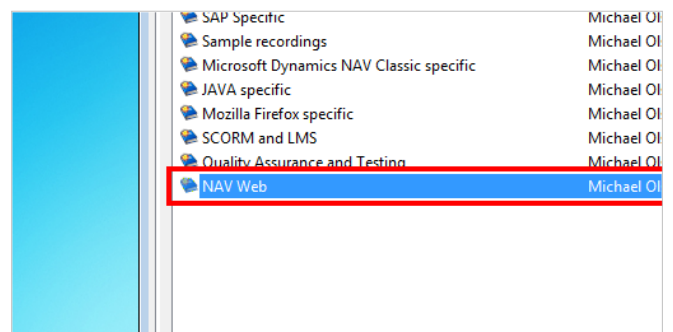
Click on the button **Save**.
You may also press **Alt+S**.



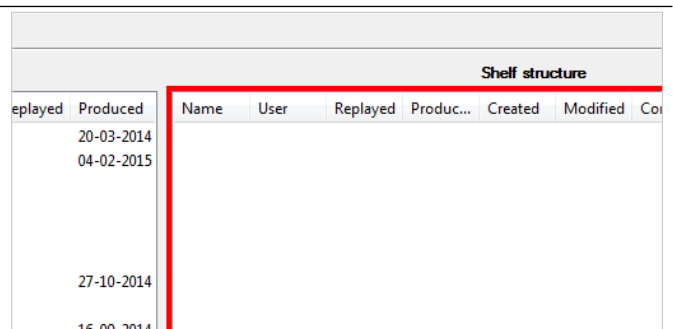
2.2.3. Add books

It is simple drag and drop, to add books to the shelf structure.

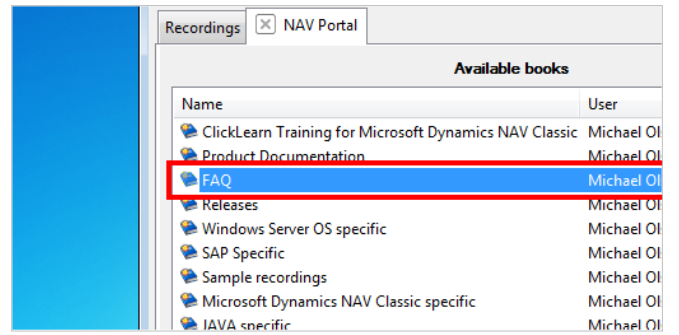
Click and hold the left mouse button on the list element **NAV Web**.



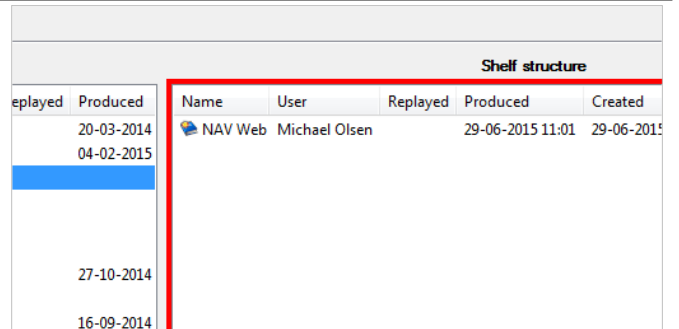
Release the left mouse button on the list **Shelf structure**.



Click and hold the left mouse button on the list element **FAQ**.



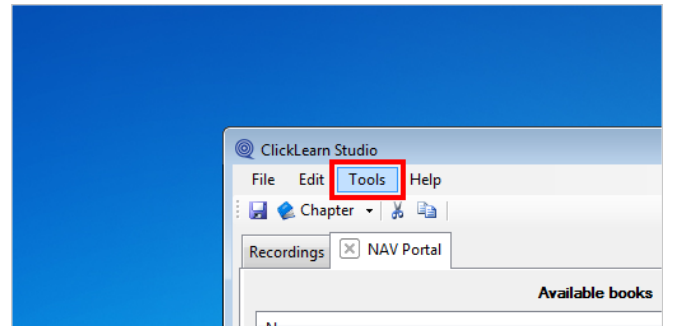
Release the left mouse button on the list **Shelf structure**.



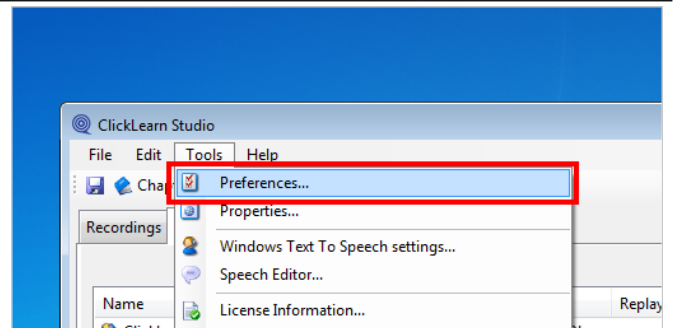
You may control the sequence within the book, by dragging and dropping with the book structure list.

2.2.4. Preferences

Click on the menu **Tools**.

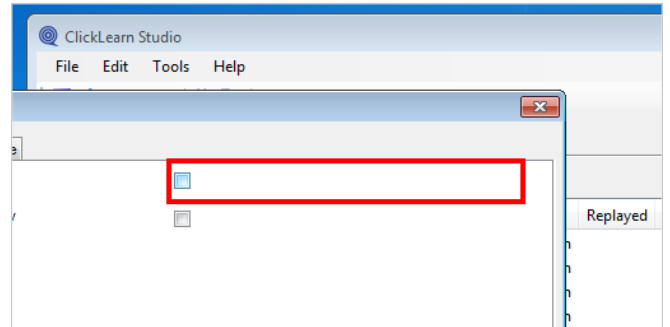


Click on the menu **Preferences...**



2.2.4.1. ClickLearn Assist

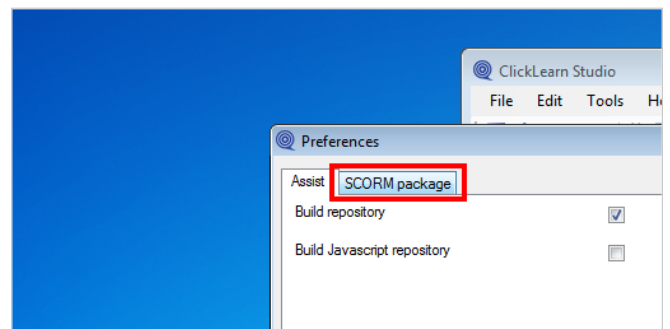
Click on the checkbox **Build repository**.



You may set this checkmark in order to produce the required repository for ClickLearn Assist.

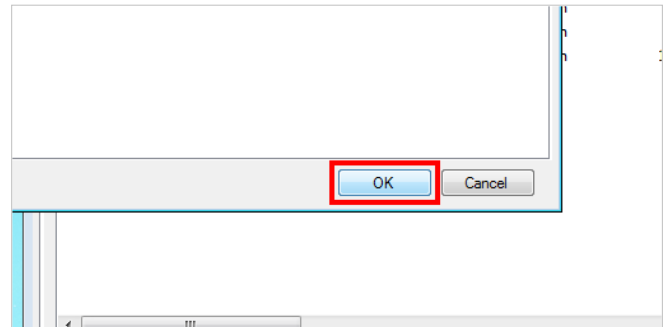
2.2.4.2. SCORM and LMS

Click on the tab **SCORM package**.



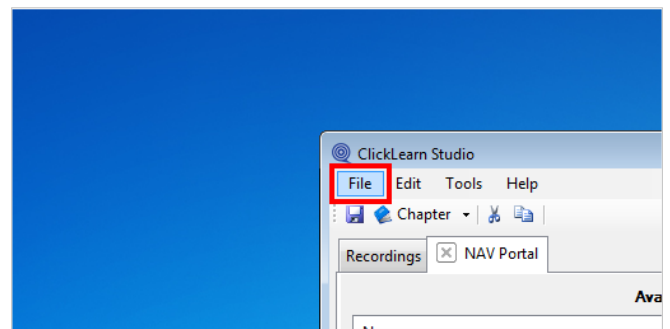
Please refer to the book named "SCORM and LMS".

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



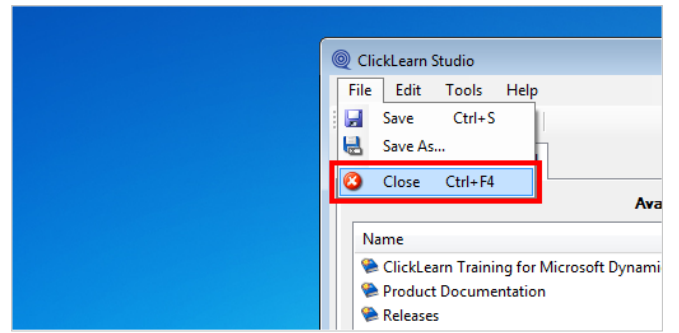
2.2.5. Save and produce

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

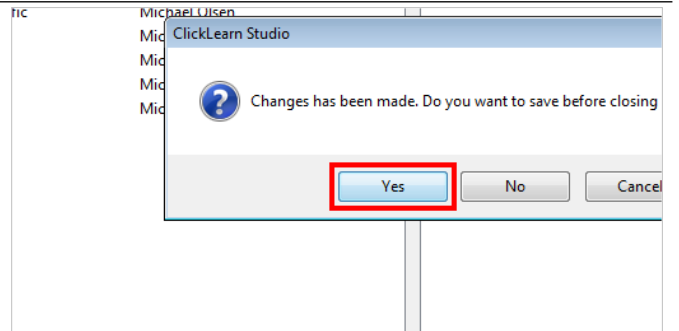


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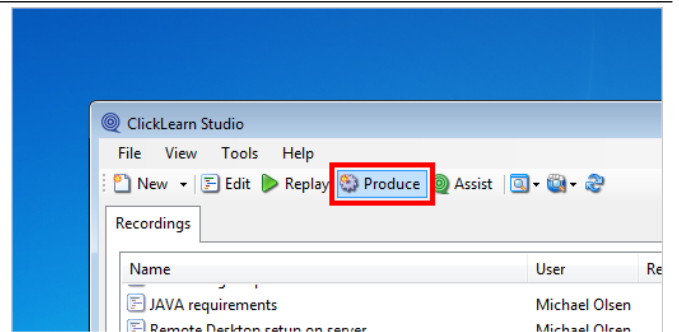
Click on the menu **Close**.



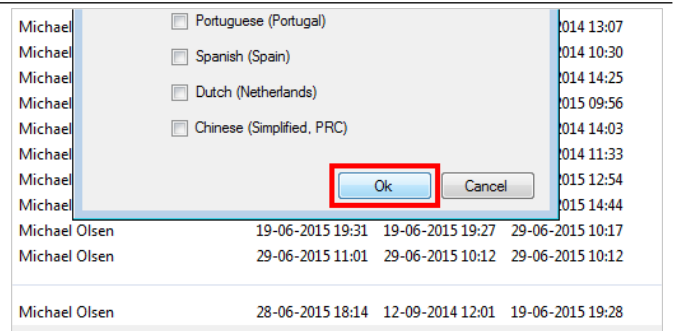
Click on the button **Yes**.
You may also press **Alt+Y**.



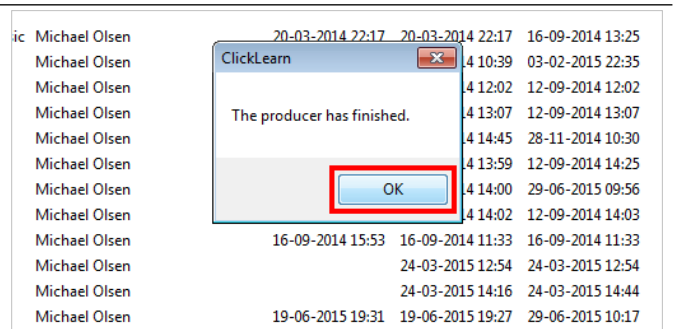
Click on the button **Produce**.
You may also press **Alt+U**.



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



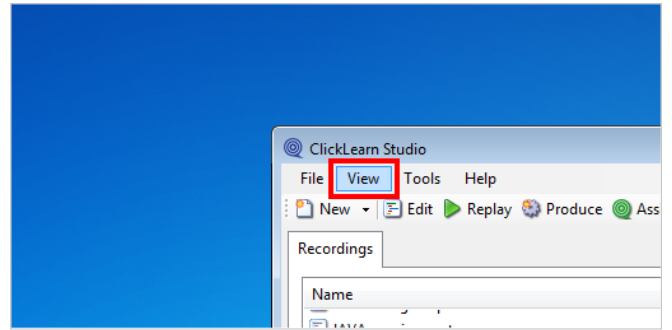
Click on the button **OK**.



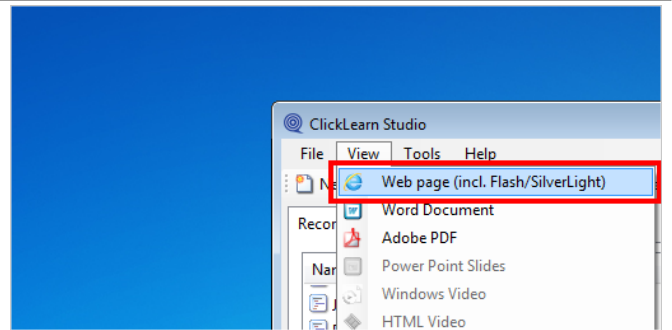
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2.2.6. The result

Click on the menu **View**.
You may also press **Alt+V**.

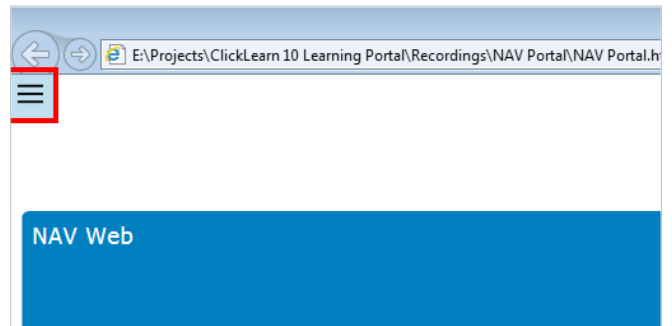


Click on the menu **Web page (incl. Flash/SilverLight)**.



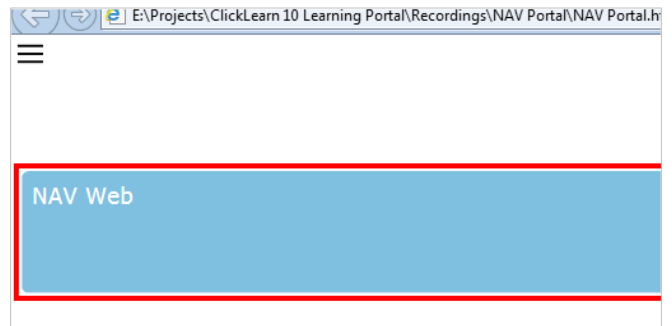
2.2.6.1. Menu structure

Click on the menu icon.



The menu icon gives you access to the books and recordings on the shelf.

Click on **NAV Web**

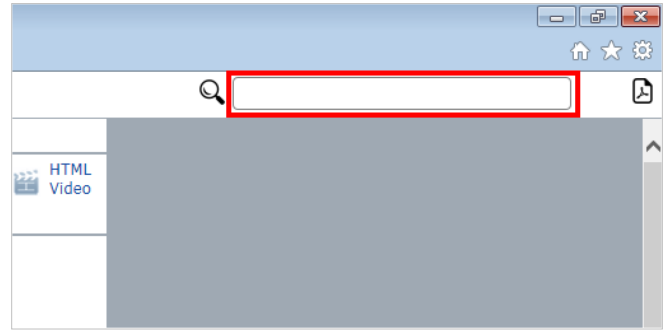


2.2.6.2. Search

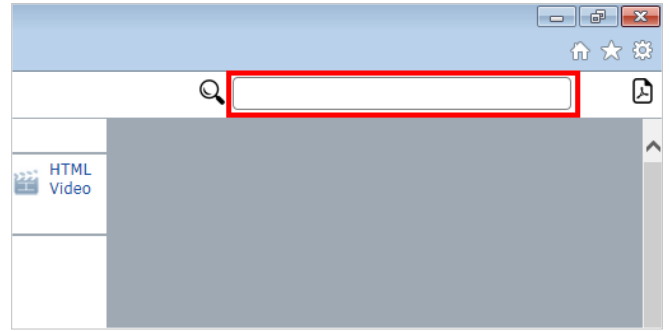
The shelf produces a full word index of all books and recordings, which allows you to search easily in all content.

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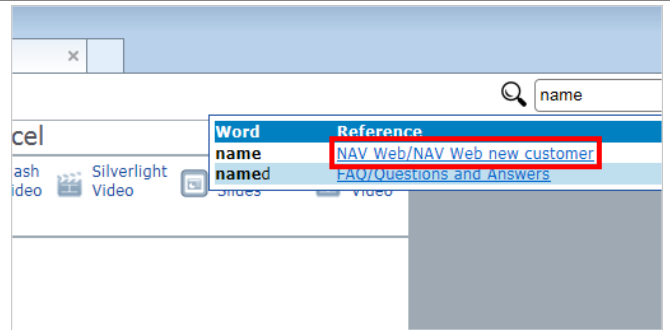
Click on the input field



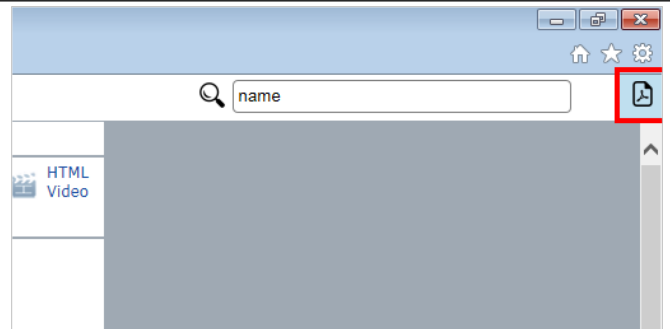
Enter the text to search for.



Click on the link **NAV Web/NAV Web new customer**

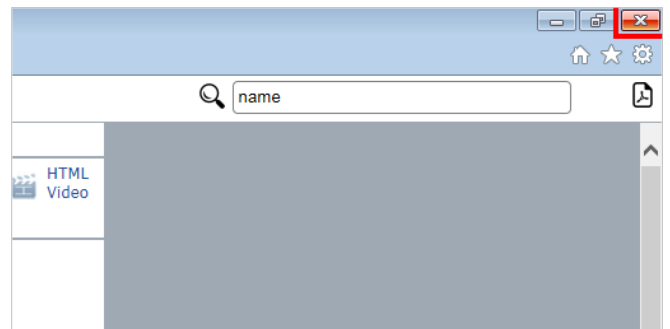


Move the mouse to the PDF icon.



The user gets access to the complete shelf as one single PDF document.

Click on the button **Close**.



3. ClickLearn Assist

3.1. Assist in ClickLearn Studio

3.1.1. Introduction

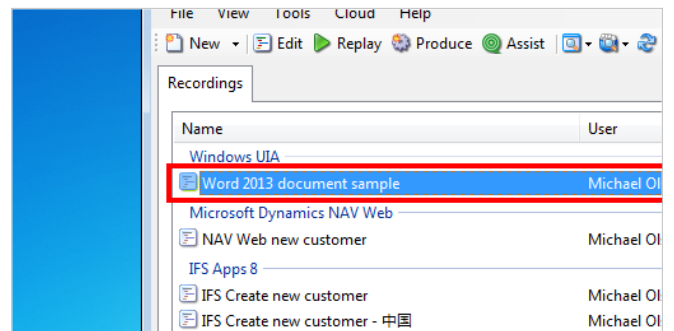
ClickLearn Assist provides an on-screen assistant that will guide you through the process on top of your live system.

When you have recorded your process on the system, you may start Assist from within ClickLearn Studio.

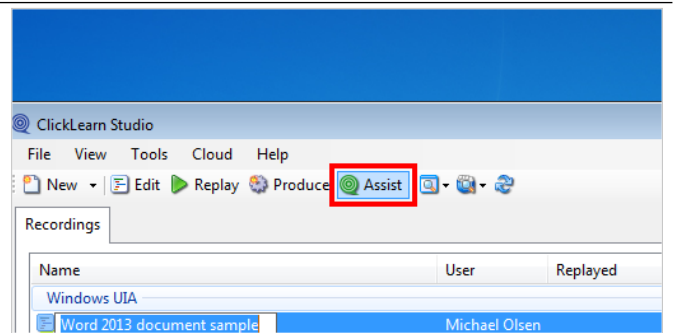
3.1.2. Start Assist

Please make sure that you have the right starting point on your system before starting the Assist.

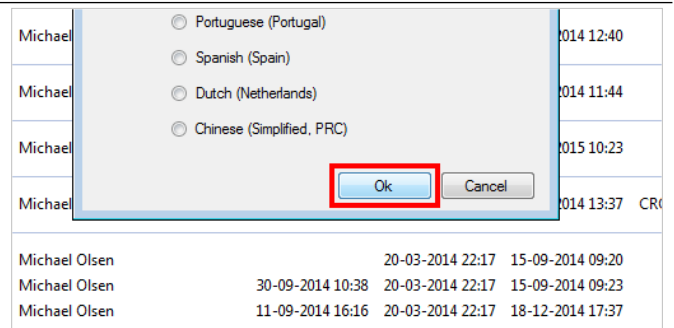
Click on the list element **Word 2013 document sample** **sample**.



Click on the button **Assist**.
You may also press **Alt+A**.



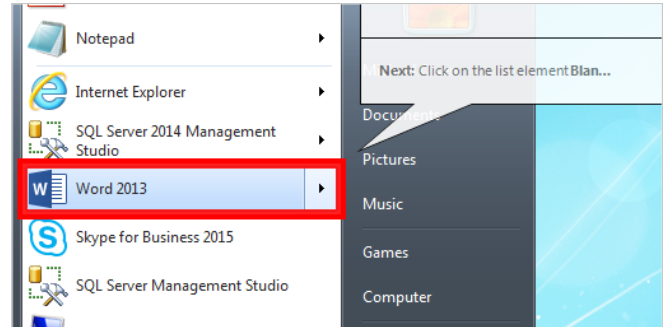
Click on the button **Ok**.
You may also press **Alt+O**.



Click on the button **Start**.
You may also press **Ctrl+Esc**.



Click on the menu **Word 2013**.

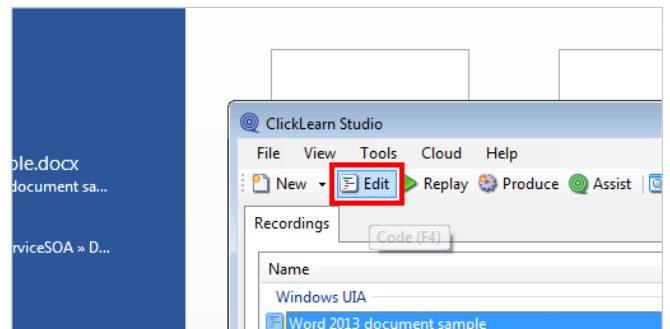


3.1.3. Assist starting point

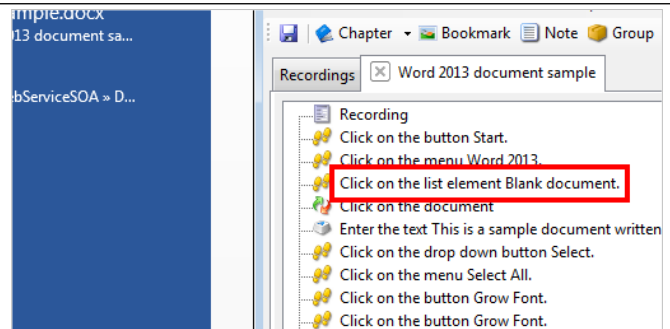
If you are testing the flow of your recorded Assist, you may want to start the Assist from a specific point, instead of starting from the first step each time.

It is possible to do so, when you are editing the recording.

Click on the button **Edit**.
You may also press **Alt+D**.

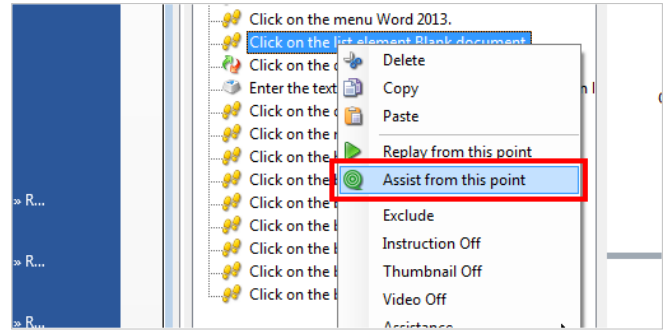


Right click on the list element you want as starting point.

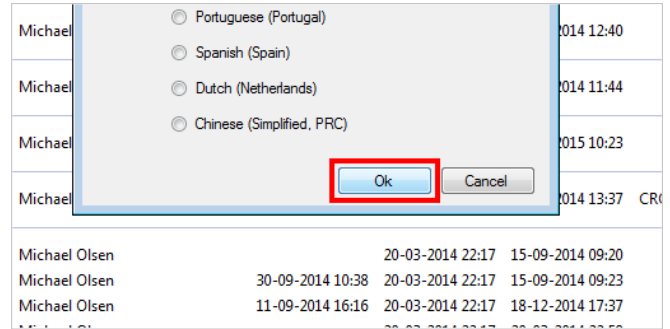


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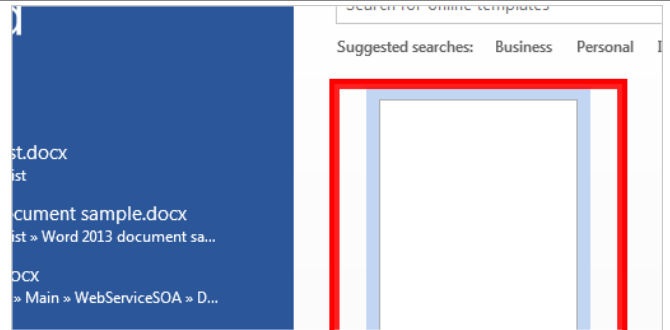
Click on the menu **Assist from this point**.



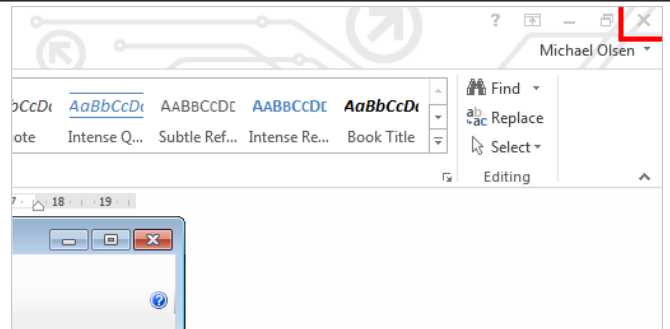
Click on the button **Ok**.
You may also press **Alt+O**.



Click on the list element **Blank document**.



Click on the button **Close**.



3.2. Assist for Windows applications

3.2.1. Installation

3.2.1.1. Click Once installation

To install ClickLearn please open your Internet Explorer and enter the address <https://apps.clicklearn.com/Assist/ClickLearnAssist.application>

The Microsoft Click Once technology ensures that you always have access to the newest ClickLearn Assist release.

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3.2.1.2. On premise installation

To install ClickLearn Assist please download the installation package. Open Internet Explorer and enter the address <https://apps.clicklearn.com/ClickLearnAssistSetup.msi> Save it and run it.

Please remember that this requires access rights to install it. If you are not allowed to, please contact your system administrator.

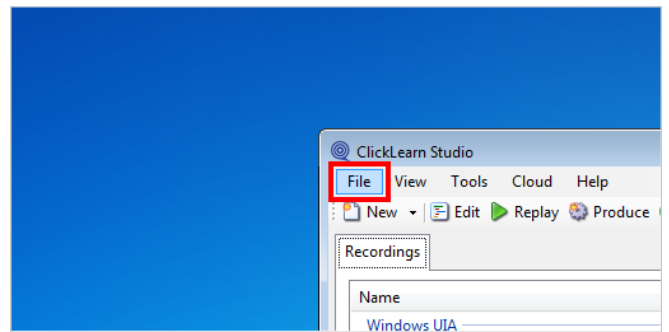
When installing ClickLearn Assist this way, you manually need to download the latest installation package and update your system.

3.2.2. Create the repository

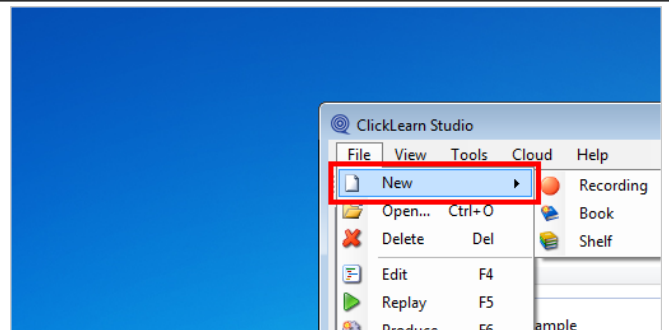
ClickLearn Assist requires to load a repository. This repository is a simple XML file, and may easily be created from a book and a shelf.

In this example, we will create it from a book, but it is the same procedure for a shelf.

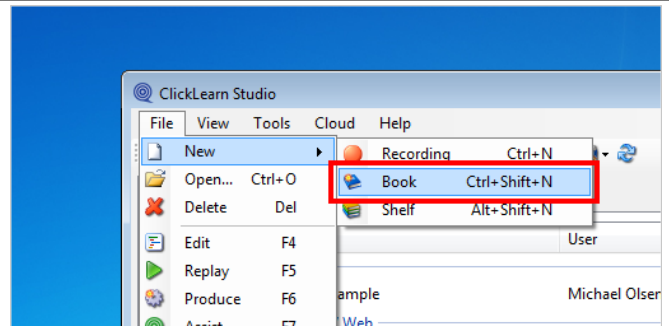
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **New**.

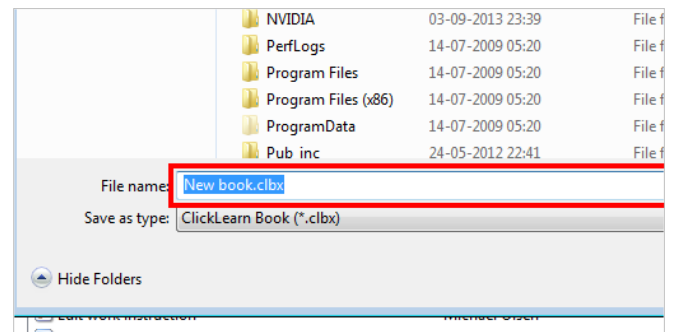


Click on the menu **Book**.

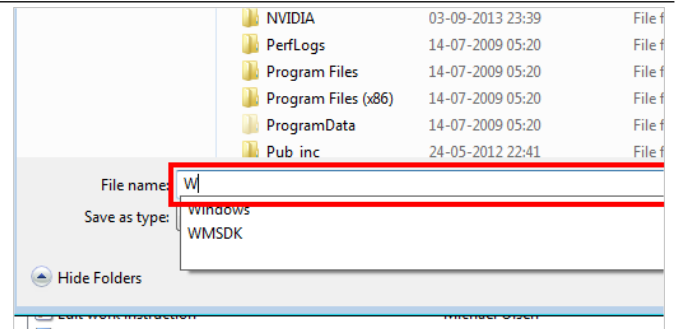


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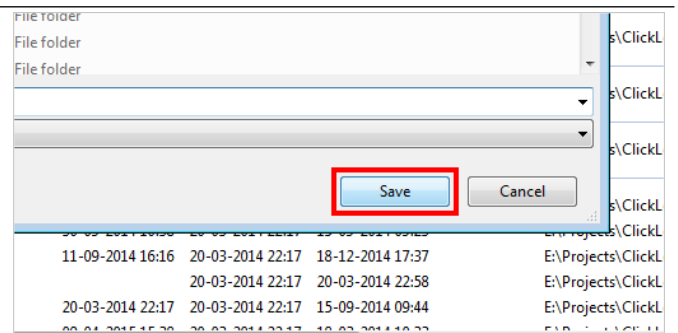
Click on the File name



Enter the name of your book.

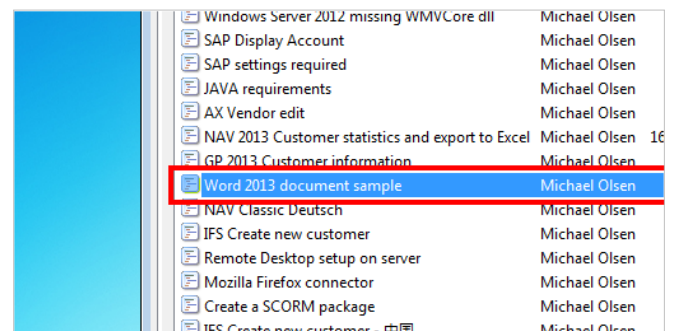


Click on the button **Save**.
You may also press **Alt+S**.

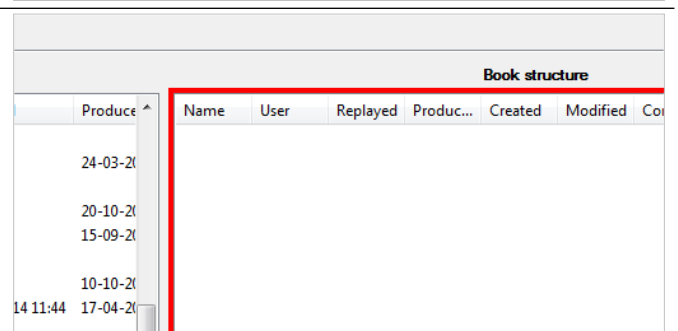


3.2.2.1. Add recordings to the book

Click and hold the left mouse button on the list element **Word 2013 document sample**.

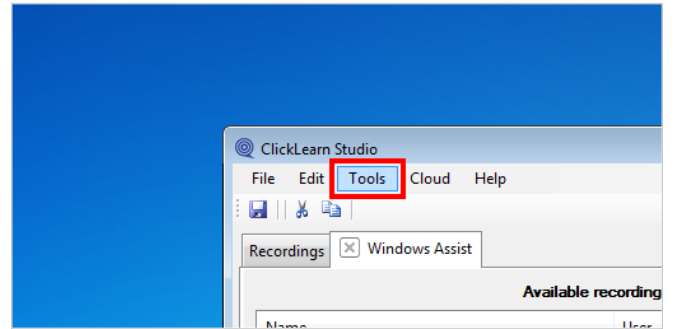


Release the left mouse button on the list **Book structure**.

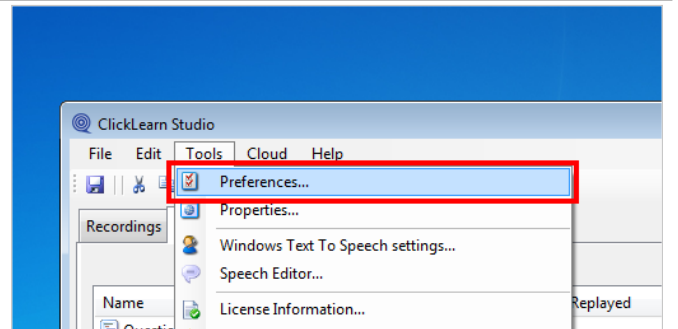


3.2.2.2. Assist preferences

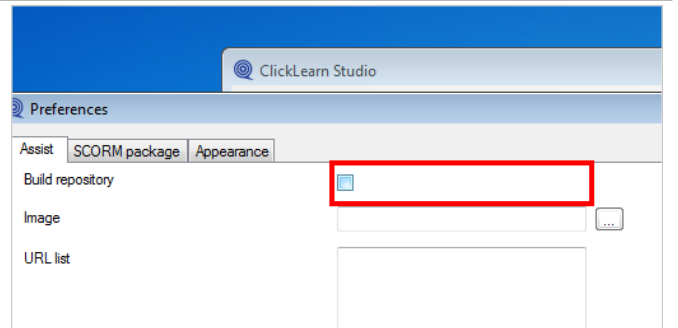
Click on the menu **Tools**.



Click on the menu **Preferences...**

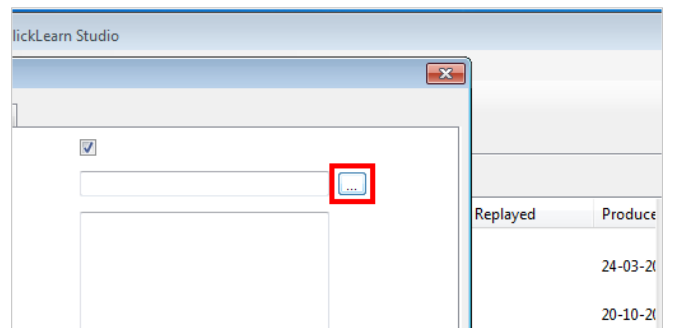


Click on the checkbox **Build repository**.

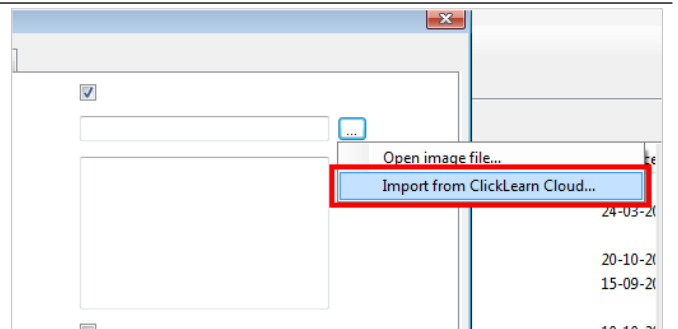


3.2.2.2.1. Customize the Assist image

Click on the button

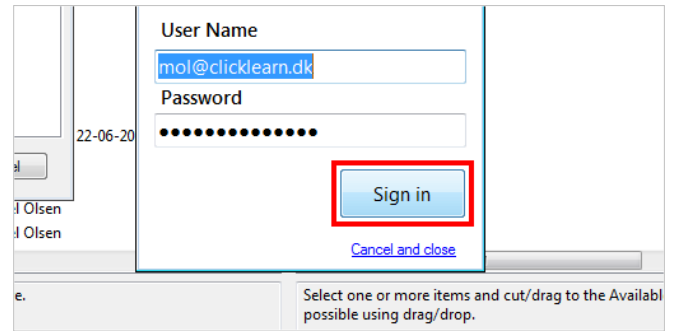


Click on the menu **Import from ClickLearn Cloud...**

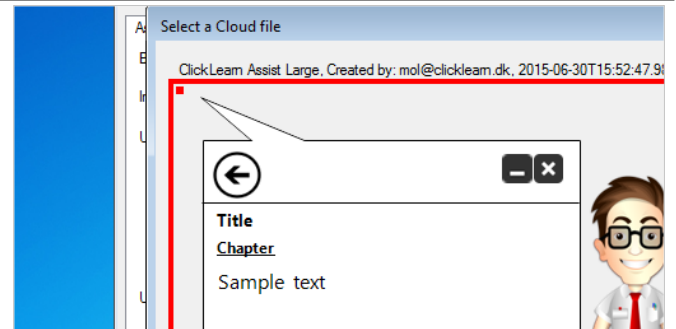


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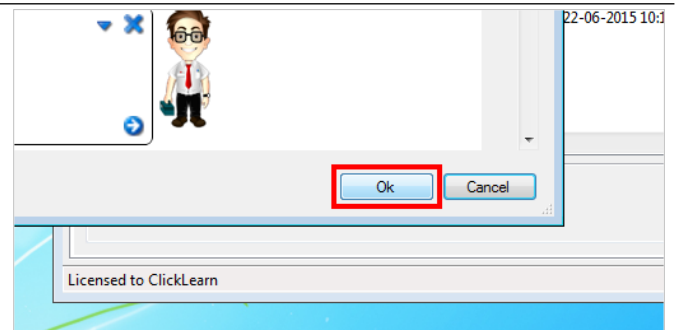
Click on the button **Sign in**.
You may also press **Alt+S**.



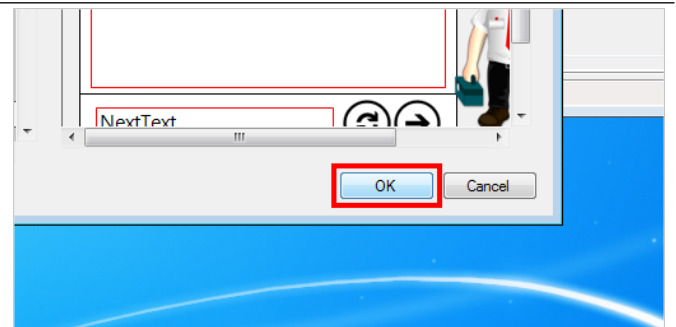
Click on .



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



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



3.2.2.2.

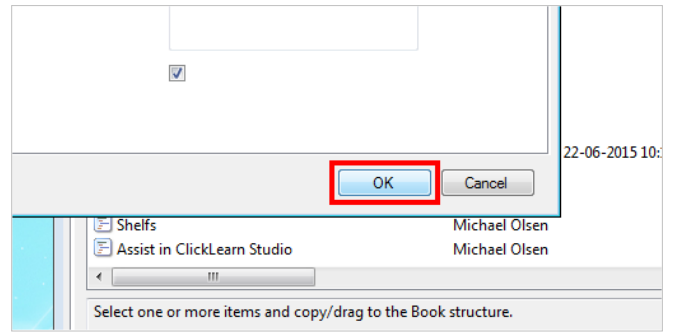
ClickLearn Cloud storage

Click on the checkbox **Upload to Cloud**.

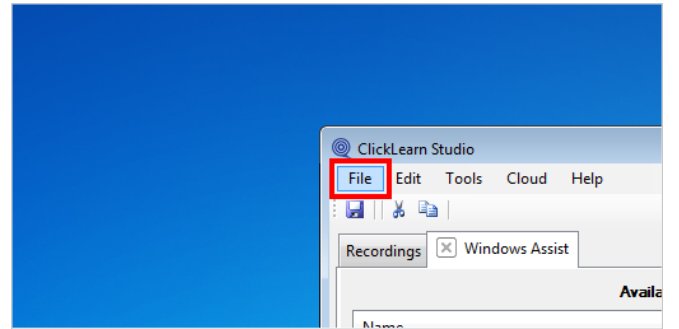


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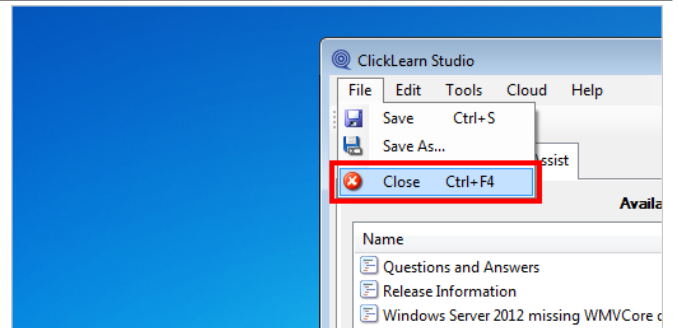
Click on the button **OK**.
You may also press **Alt+O**.



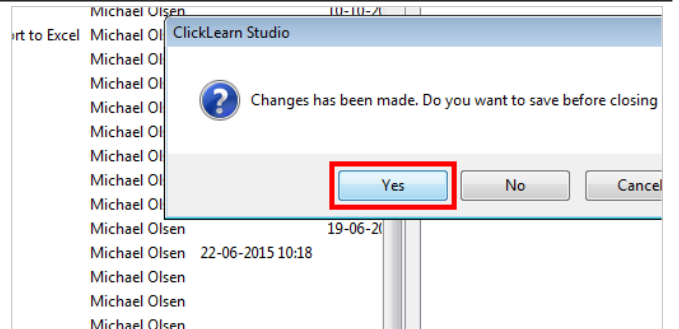
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



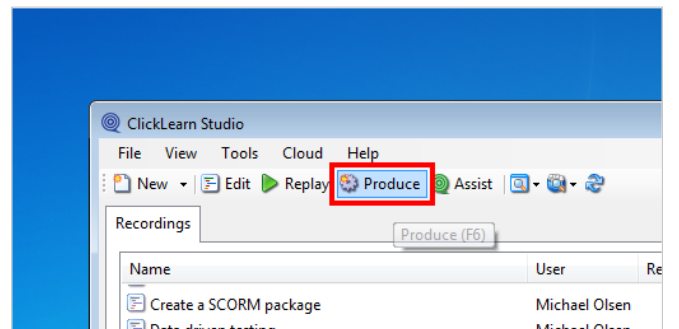
Click on the button **Yes**.
You may also press **Alt+Y**.



3.2.2.3.

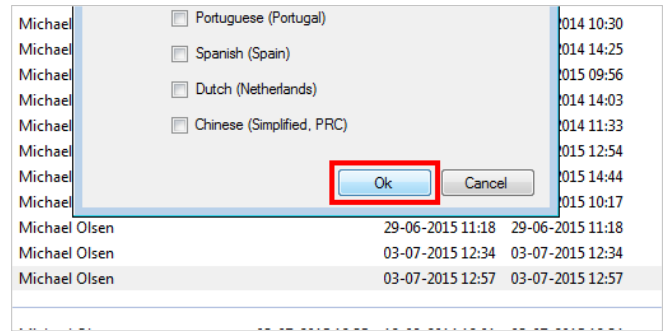
Produce the repository

Click on the button **Produce**.
You may also press **Alt+U**.

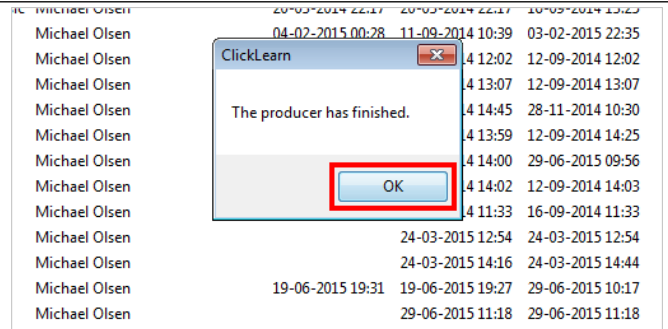


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Click on the button **Ok**.
You may also press **Alt+O**.



Click on the button **OK**.



When the book has been produced, the folder will contain the Assist repository XML file.

In this example, the file is located at C:\Windows Assist\Windows Assist.xml.

Also, It has been uploaded to the ClickLearn Cloud account, and may be accessed using the name of the book, which in this example is Windows Assist.

3.2.3. Application parameters

The Assist application may be started with one or more parameters.

3.2.3.1. AssistRepository

For example:

<https://apps.clicklearn.com/Assist/ClickLearnAssist.application?AssistRepository=C:\Windows%20Assist\Windows%20Assist.xml>

3.2.3.2. Recording

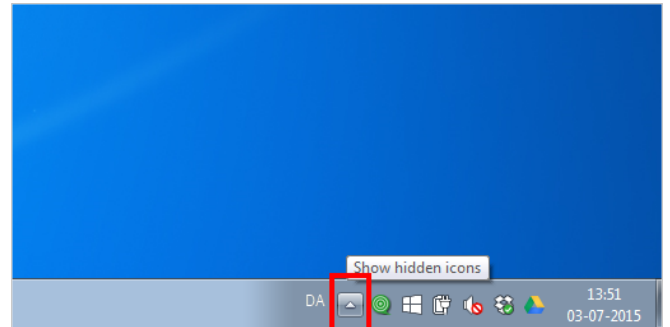
For example:

<https://apps.clicklearn.com/Assist/ClickLearnAssist.application?AssistRepository=C:\Windows%20Assist\Windows%20Assist.xml&Recording=Word%202013%20document%20sample>

3.3. The Assist application

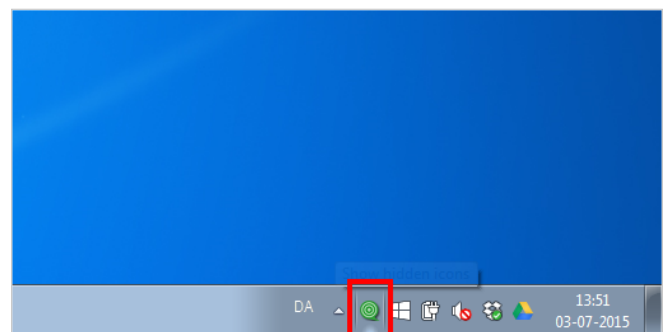
3.3.1. The tray icon

Move the mouse to the button **Show hidden icons**.



If the user cannot see the ClickLearn Assist icon in the task tray, it is because it is not installed or hidden. Windows has this button you may click to view the hidden icons.

Click on the button **ClickLearn Assist**.



3.3.2. Repository from path or URL

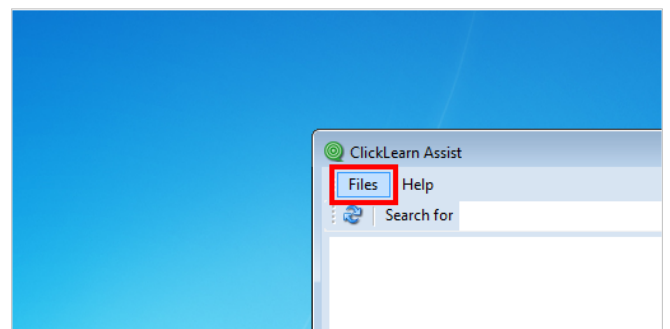
The repository file is the XML file produced from a book or shelf.

In this example, we load it from a book produced on the drive C.

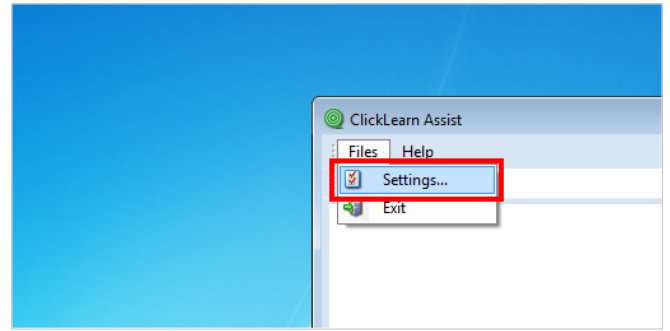
However, you may upload the file to an intranet or internet site, and provide the full URL path instead.

For example, if you upload the XML file to the server named myserver, you could enter the path <http://myserver/repository.xml>

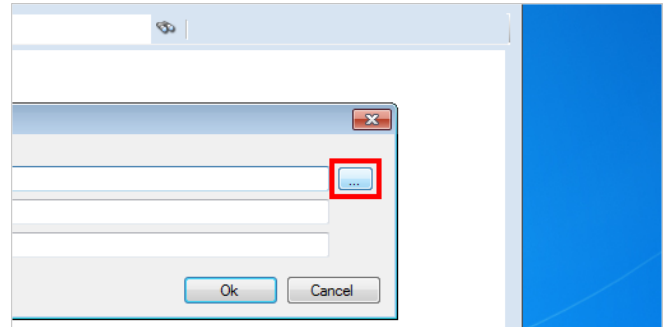
Click on the menu **File**.
You may also press **Alt+F**.



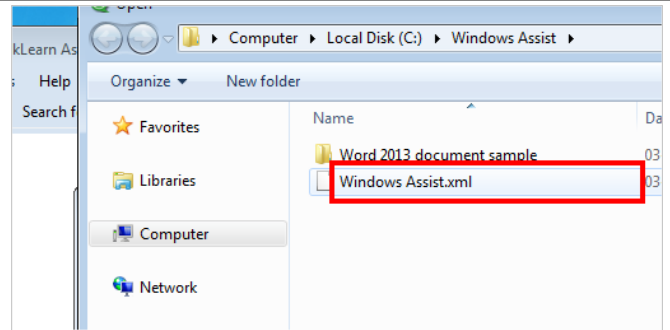
Click on the menu **Settings...**



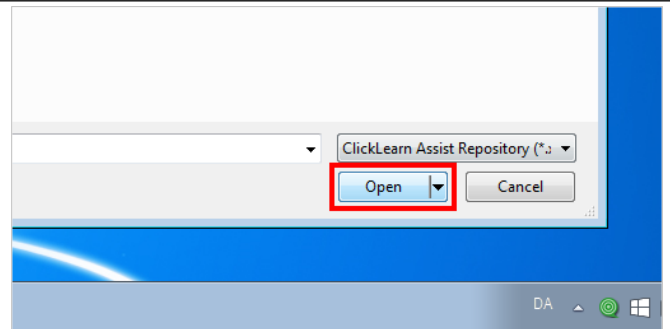
Click on the button **to the right of Repository path or URL.**



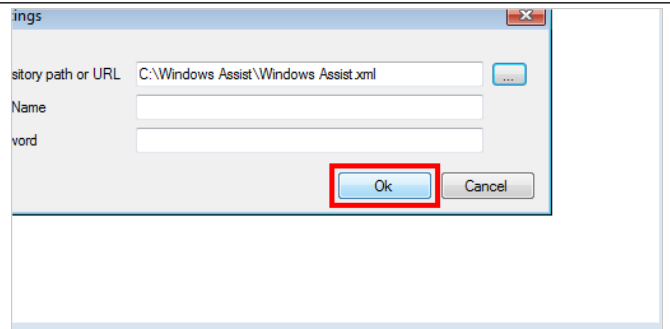
Select the repository XML file.



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



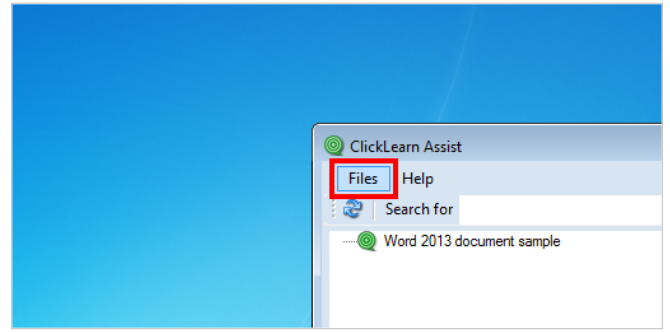
Click on the button **Ok**.
You may also press **Alt+O**.



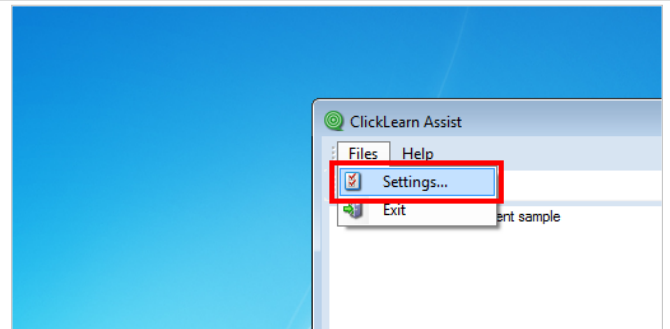
3.3.3. Repository from ClickLearn Cloud storage

In order to load the repository from the ClickLearn Cloud storage, you must provide the name of the book or shelf, along with your user name and password of your ClickLearn Cloud account.

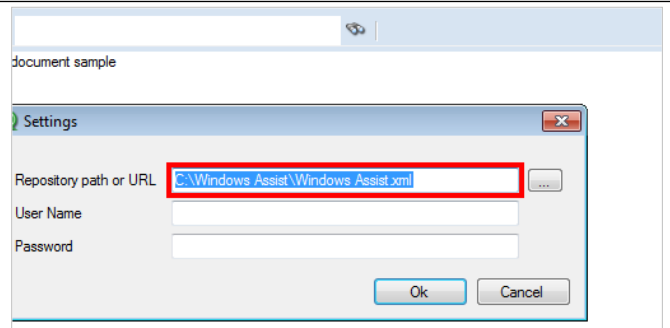
Click on the menu **File**.
You may also press **Alt+F**.



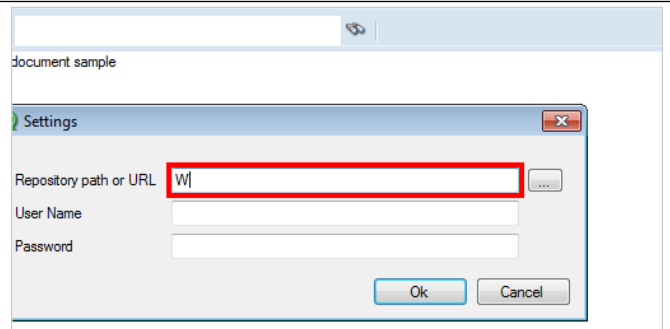
Click on the menu **Settings...**



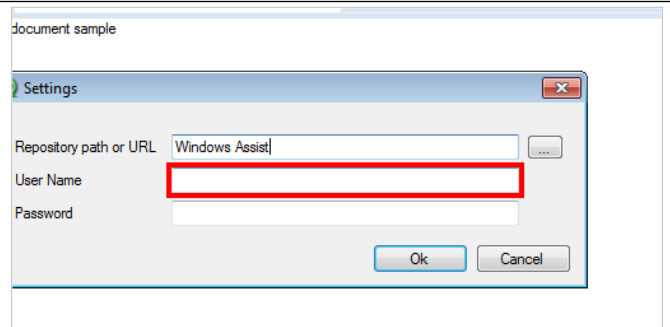
Click on the input field **Repository path or URL**.



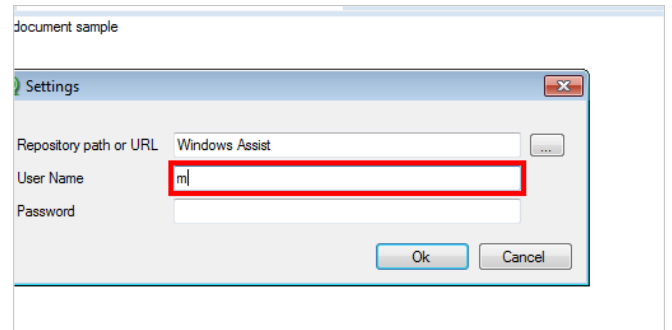
Enter **the name of the book or shelf**.



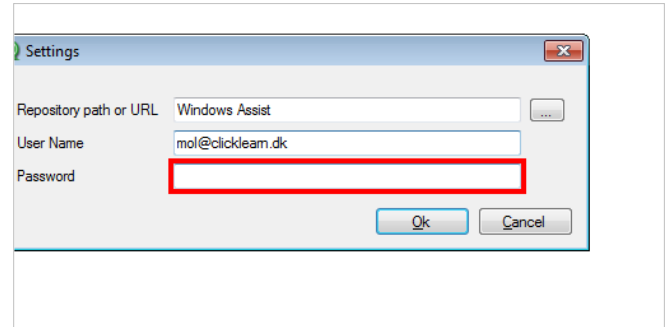
Click on the input field **User Name**.



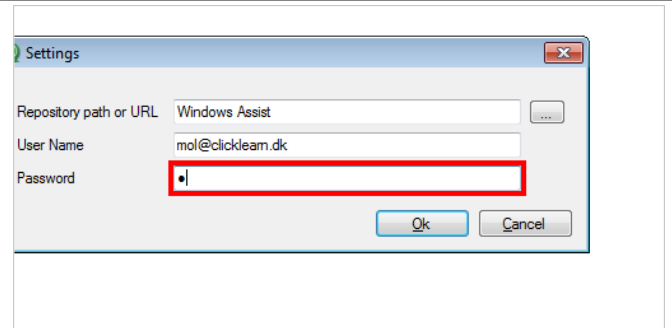
Enter **User Name**.



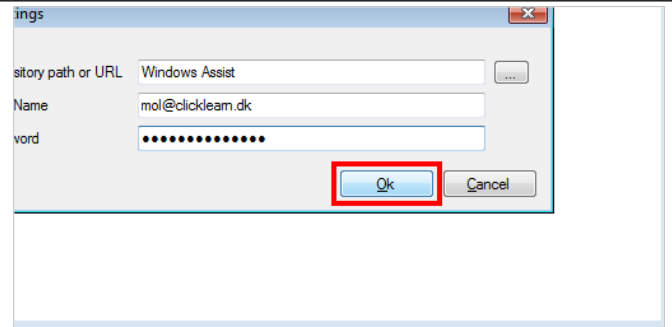
Click on the input field **Password**.



Enter **Password**.



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



3.4. Assist for web sites

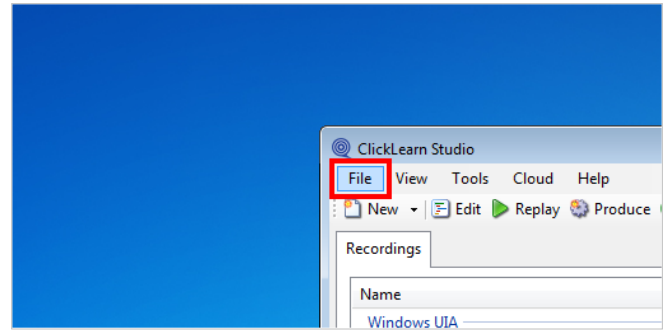
3.4.1. Create the repository

ClickLearn Assist requires to load a repository. This repository is a simple Javascript file, and may easily be created from a book and a shelf.

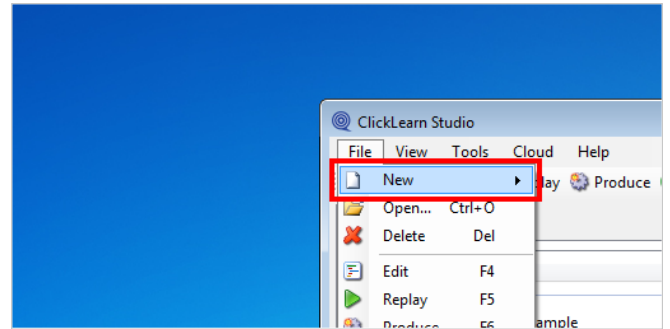
In this example, we will create it from a book, but it is the same procedure for a shelf.

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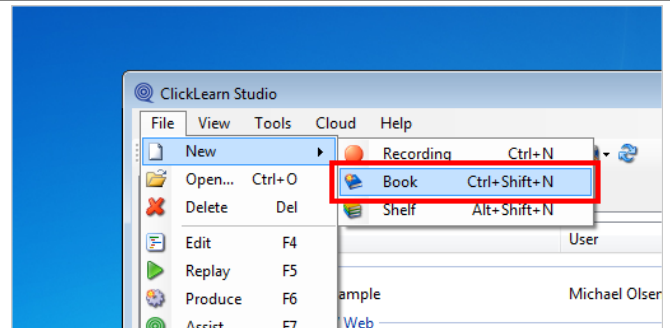
Click on the menu **File**.
You may also press **Alt+F**.



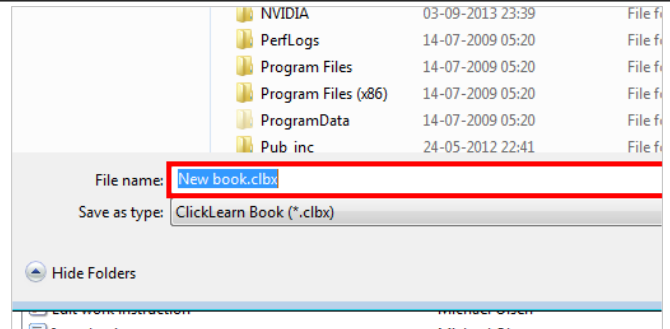
Click on the menu **New**.



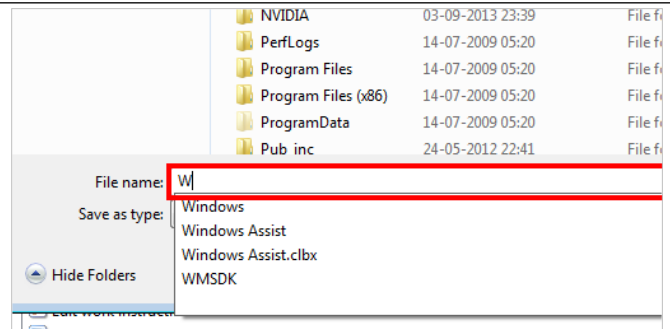
Click on the menu **Book**.



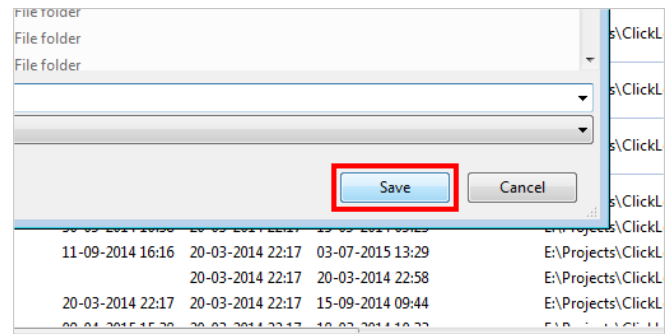
Click on the input field **File name:**.
You may also press **ALT+N**.



Enter **File name:**.

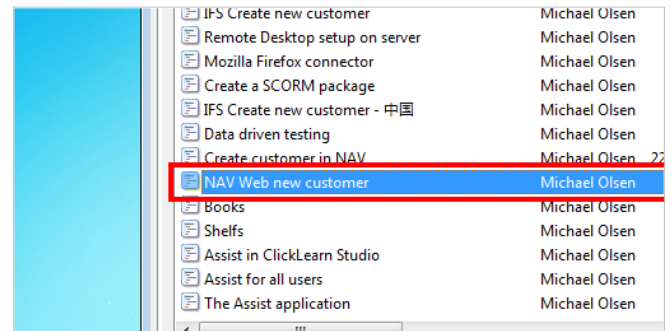


Click on the button **Save**.
You may also press **Alt+S**.

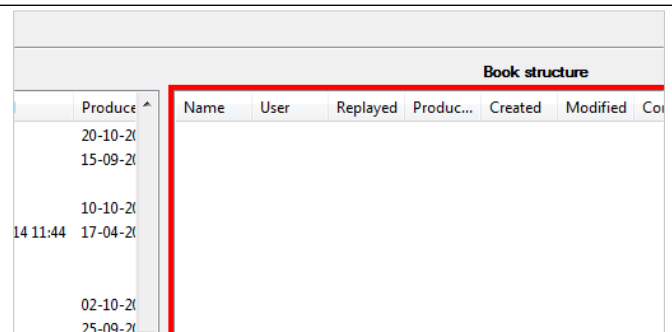


3.4.1.1. Add recordings to the book

Click and hold the left mouse button on the list element **NAV Web new customer**.

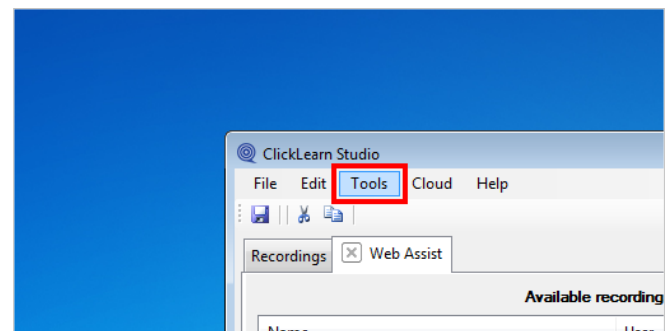


Release the left mouse button on the list .

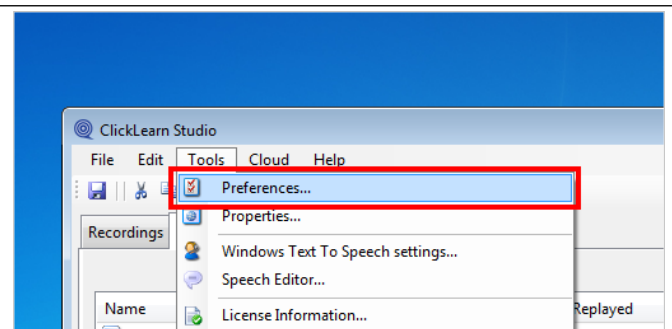


3.4.1.2. Assist preferences

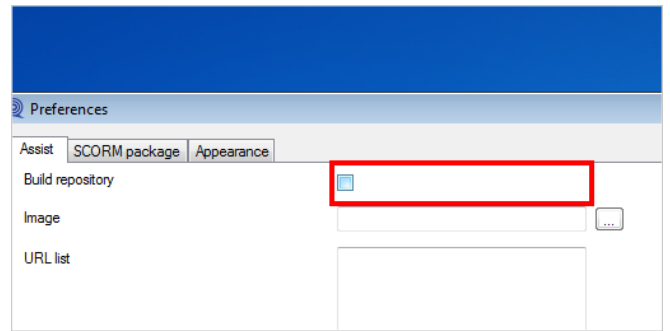
Click on the menu **Tools**.



Click on the menu **Preferences...**



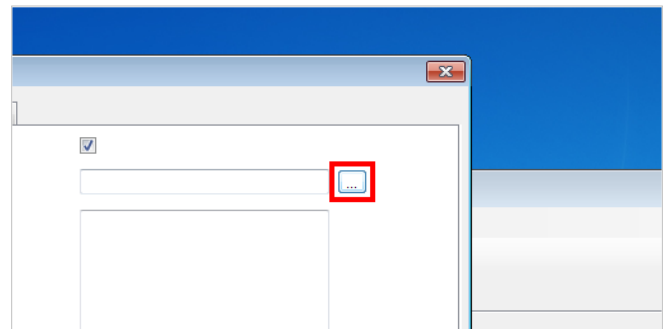
Click on the checkbox **Build repository**.



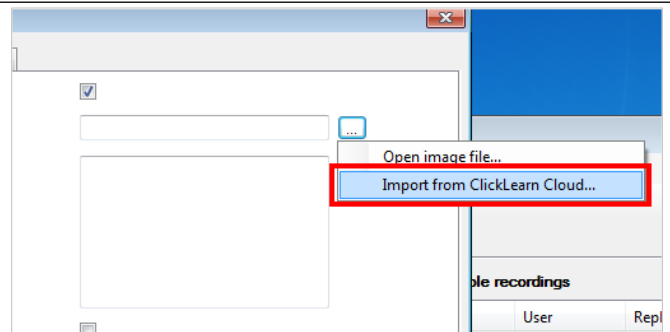
3.4.1.2.1.

Customize the assist image

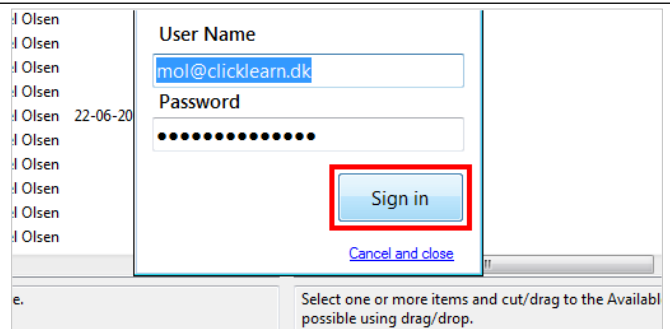
Click on the button



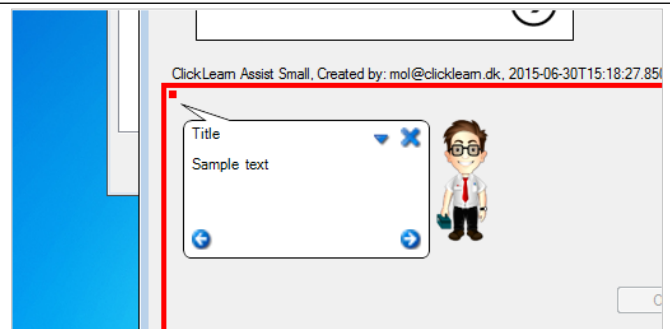
Click on the menu **Import from ClickLearn Cloud...**



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

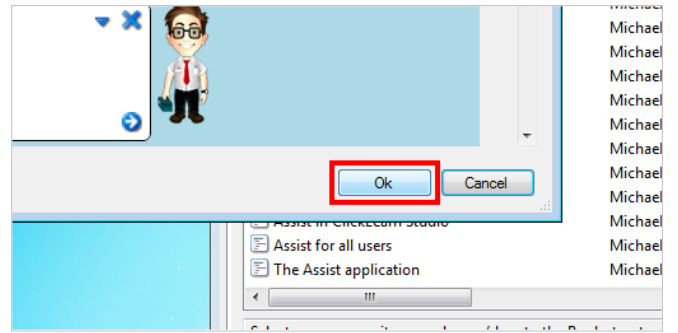


Select an assist image.

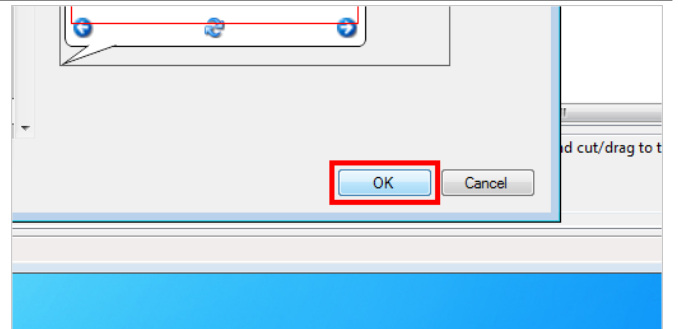


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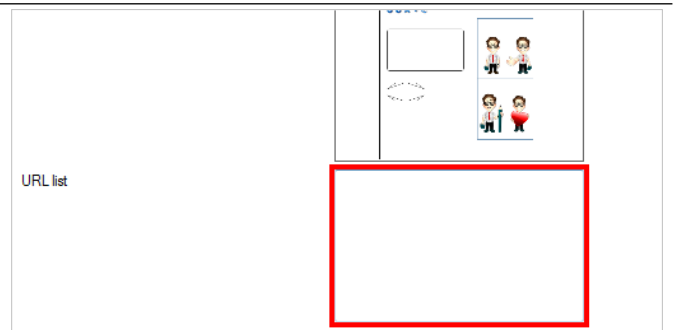
Click on the button **Ok**.
You may also press **Alt+O**.



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

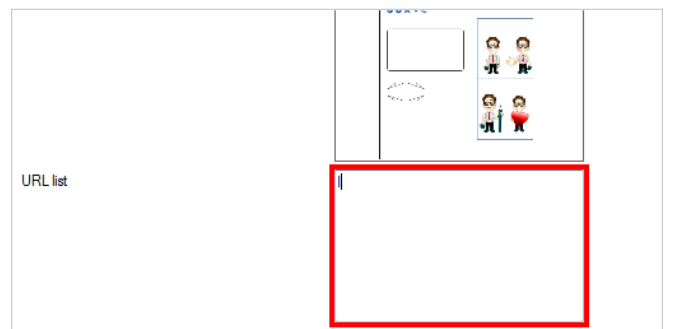


Click on the input field **URL list**.



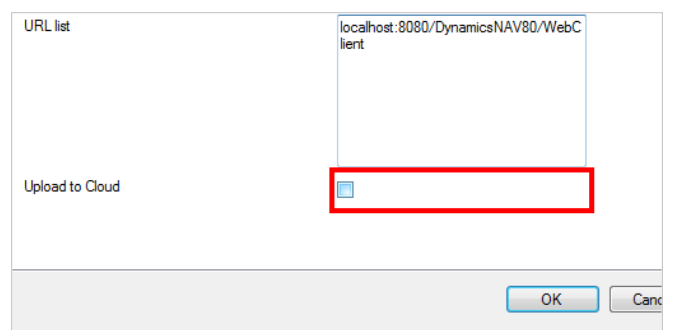
The URL list may be a list of sites where this repository should be available. In this example, we will make it available for the local installation of a Microsoft Dynamics NAV Webclient.

Enter **URL list**.



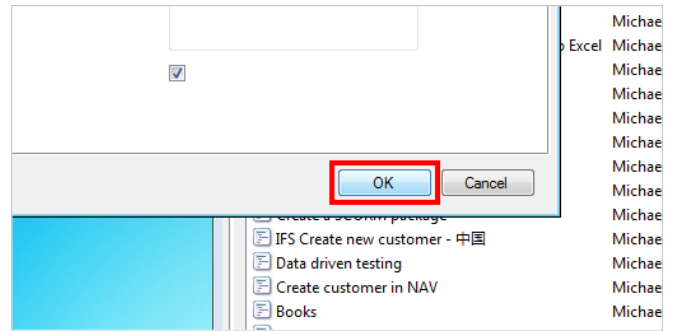
3.4.1.2.2. ClickLearn Cloud storage

Click on the checkbox **Upload to Cloud**.

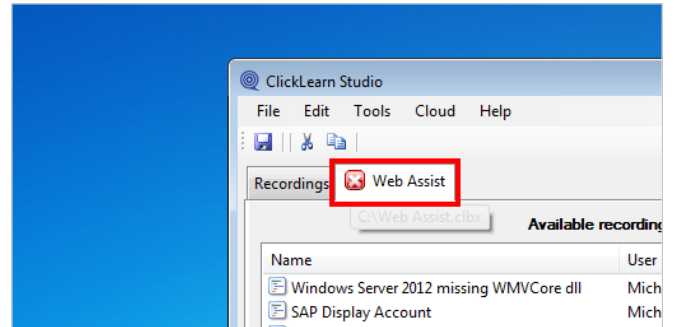


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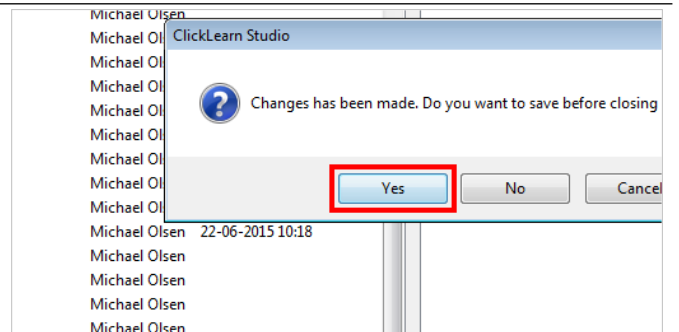
Click on the button **OK**.
You may also press **Alt+O**.



Click on the tab **Web Assist**.

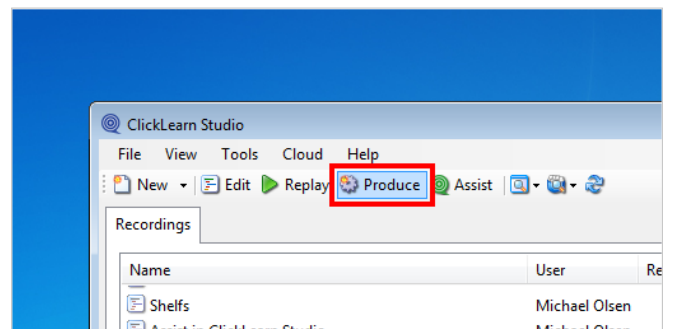


Click on the button **Yes**.
You may also press **Alt+Y**.

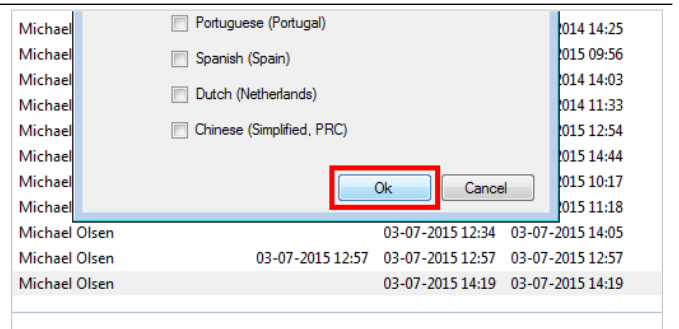


3.4.1.3. Produce the repository

Click on the button **Produce**.
You may also press **Alt+U**.

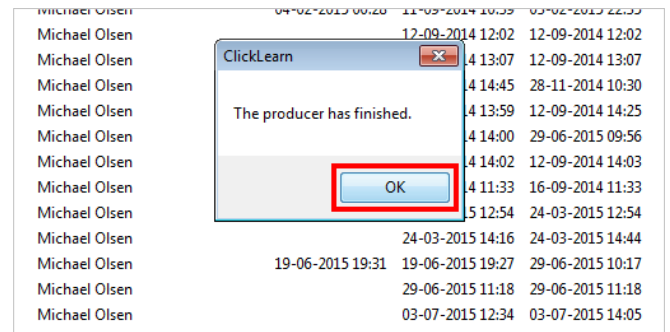


Click on the button **Ok**.
You may also press **Alt+O**.



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Click on the button **OK**.



When the book has been produced, the folder will contain the Assist repository Javascript file.

In this example, the file is located at C:\Web Assist\Web Assist.assist.js.

Also, It has been uploaded to the ClickLearn Cloud account, and will automatically be available when you are on one of the listed URL addresses.

3.5. Assist for all web users

3.5.1. Integrate with your web site

If you have access to the static html pages in your web site, and want to embed the Assist repository produced by ClickLearn, this is easily done by adding a single line to the html document.

However, when web sites consists of a large number of separate html pages, or primarily from dynamic generated pages, this might be an impossible task.

3.5.1.1. Use a HttpModule

For ASP and MVC sites, you will have an easy option to extend it with the ClickLearn Http module, so that the Assist repository is automatically added to all pages.

You may freely download the required http module from:
<https://apps.clicklearn.com/ClickLearnAssistHttpModule.zip>.

Unpack the file and copy the ClickLearnAssistHttpModule.dll into your web site bin folder.

Make sure to copy the produced assist.js javascript file to your web site first.

3.5.1.1.1. Modify the web.config file

You need to modify your existing web.config file. Please refer to following sample setup, for it to work.

```
<configuration> <system.webServer> <modules> <add name="ClickLearnAssistHttpModule"
type="ClickLearnAssistHttpModule" /> </modules> </system.webServer> <appSettings> <add
key="ClickLearnAssistHttpModuleScript" value="Web Assist.assist.js" /> </appSettings> </configuration>
```

3.5.1.2. Manually add the javascript

To manually embed the Assist repository, you need to add the following code line in your html pages:

```
<script src="Web assist.assist.js"></script>
```

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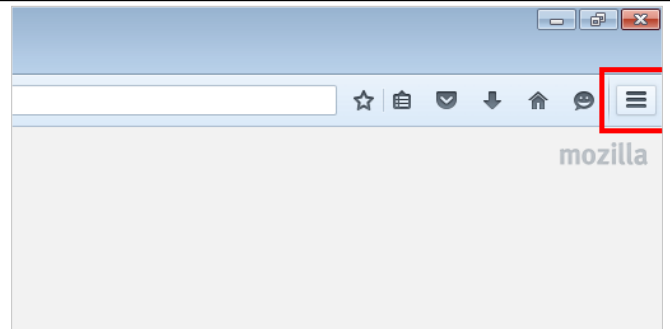
3.5.2. Use the Firefox extension

3.5.2.1. Installation of the extension

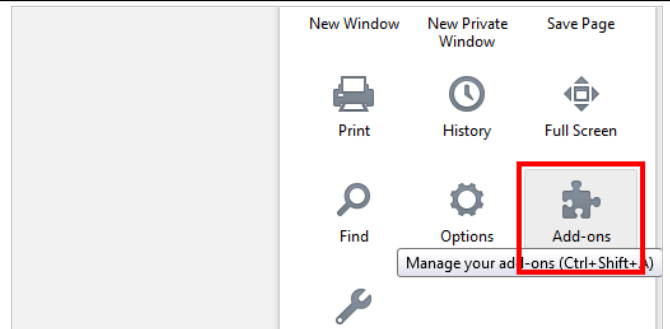
Click on the button **Mozilla Firefox**.



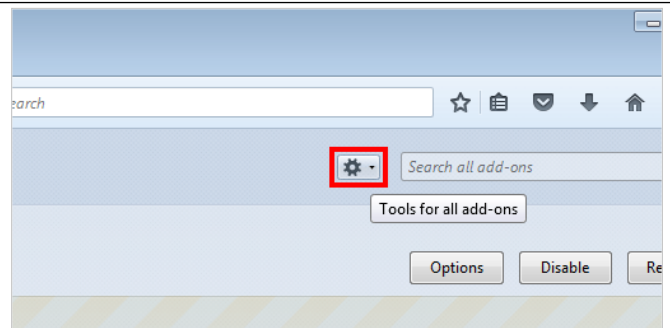
Click on the button **Firefox**.



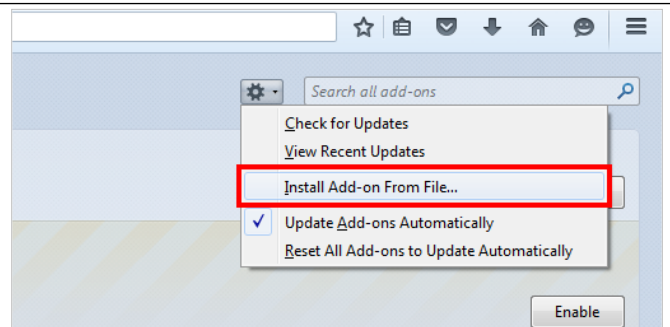
Click on the button **Add-ons**.



Click on the button **Tools for all add-ons**.

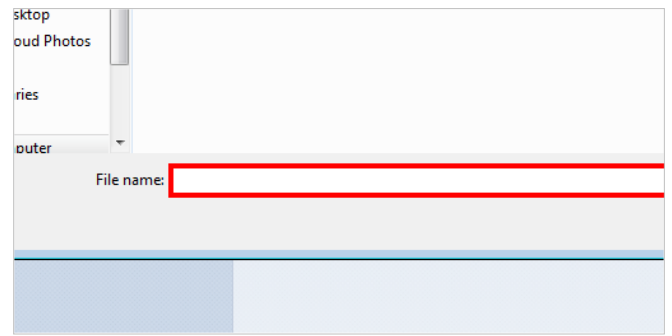


Click on the menu **Install Add-on From File**.

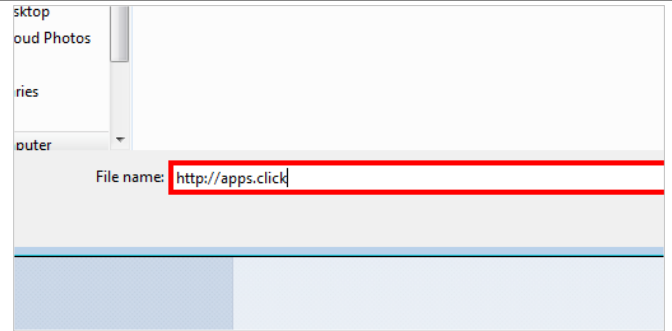


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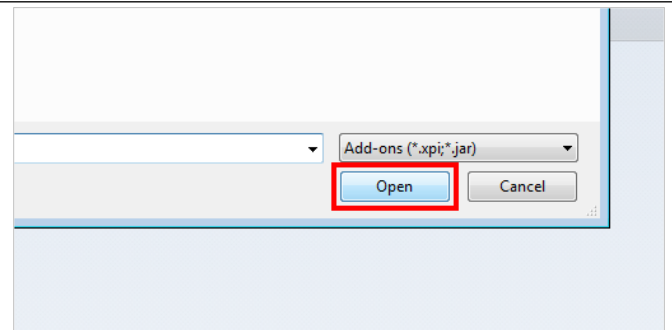
Click on the input field **File name:**.
You may also press **Alt+N**.



Enter **File name:**

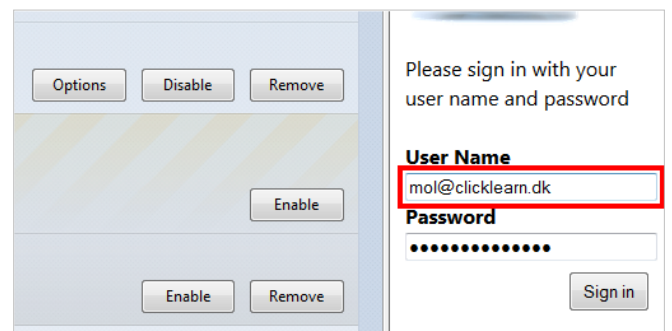


Click on the button **Open**.
You may also press **Alt+O**.

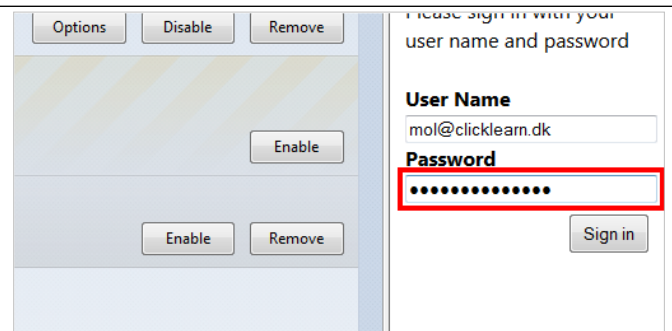


3.5.2.2. Sign in to ClickLearn Cloud

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

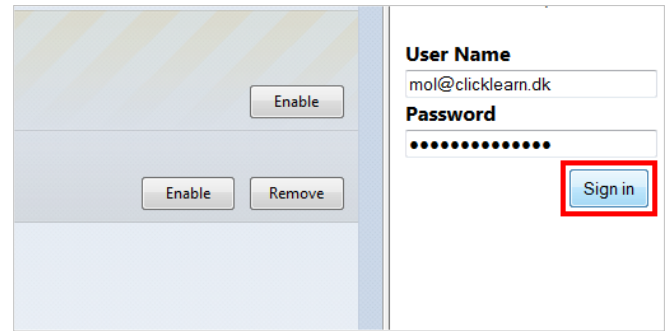


Click on the input field **Password**.



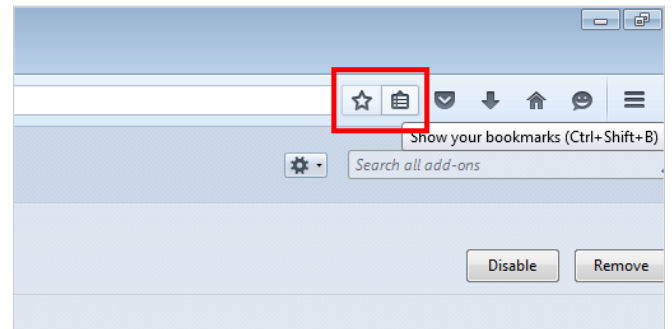
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Click on the button **Sign in**.

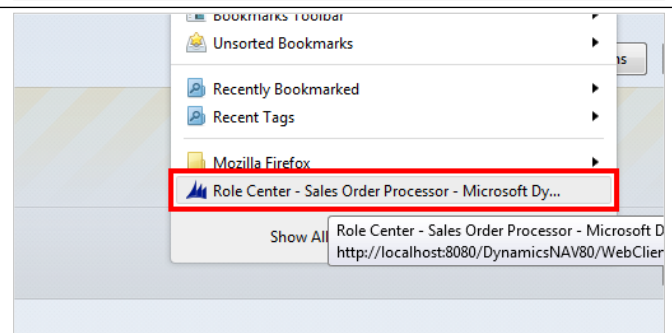


3.5.3. Open your web site

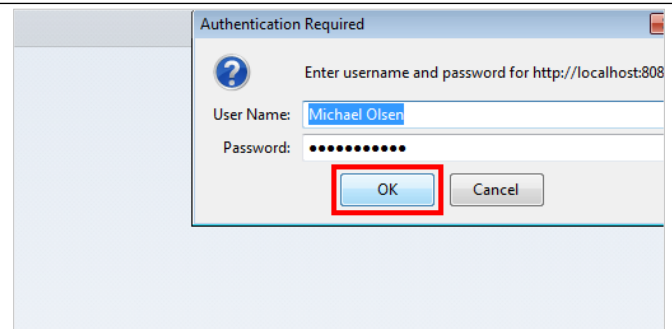
Click on the button **Bookmarks**.



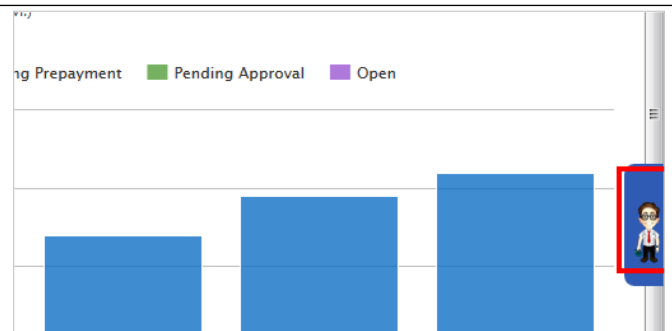
Click on the menu **Role Center - Sales Order Processor - Microsoft Dynamics NAV**.



Click on the button **OK**.

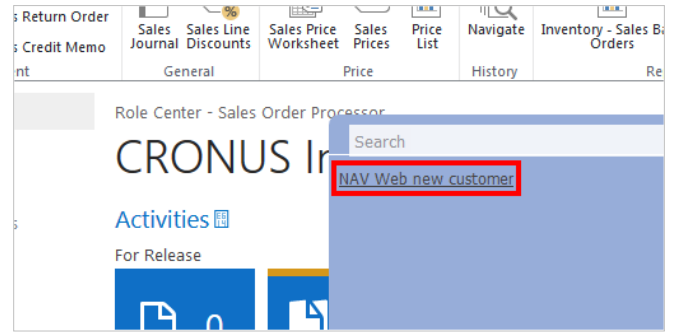


Click on the button **ClickLearn Web Assist**.

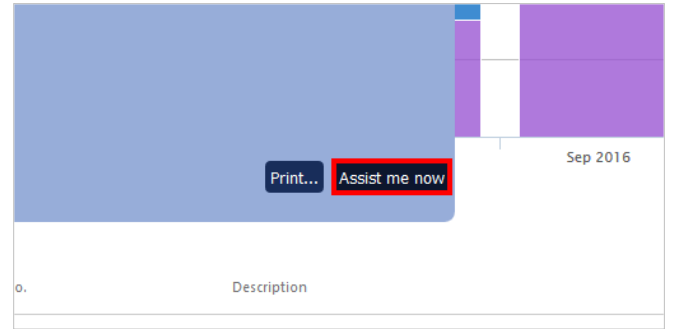


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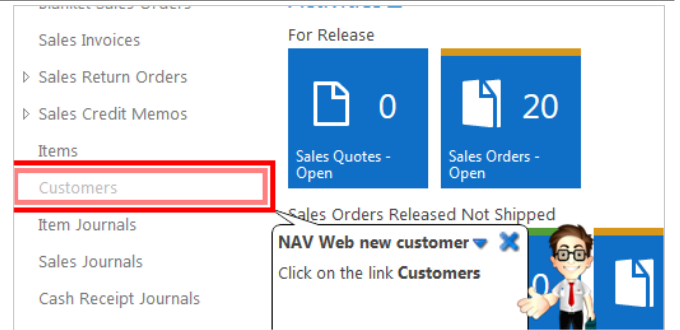
Click on the input field **NAV Web new customer**.



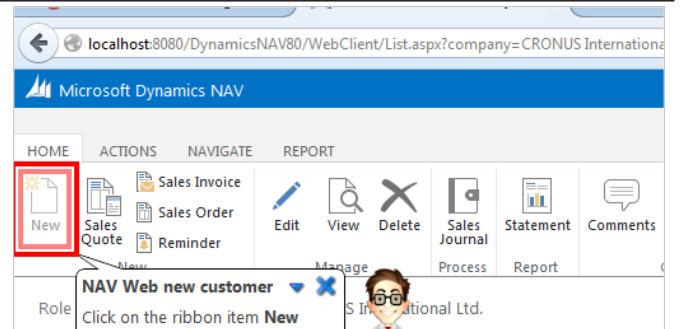
Click on the input field **Assist me now**.



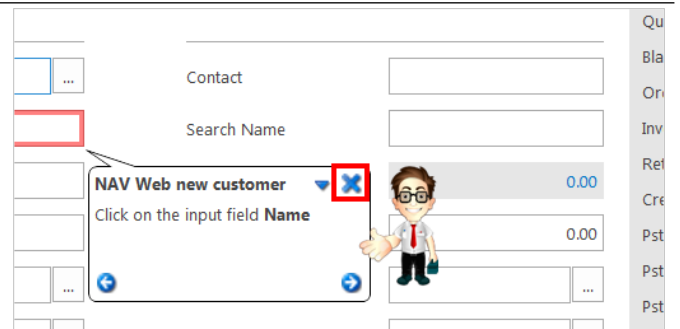
Click on the link **Customers**.



Click on the ribbon item **New**.



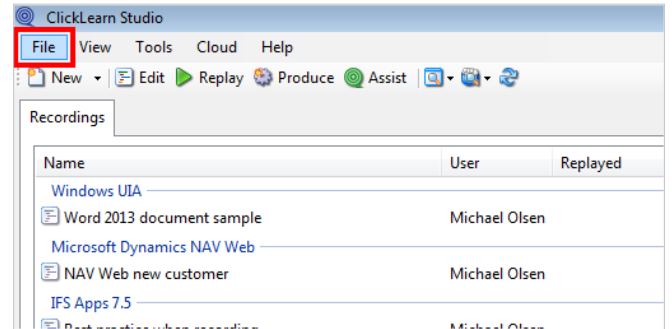
Click on the button **Close**.



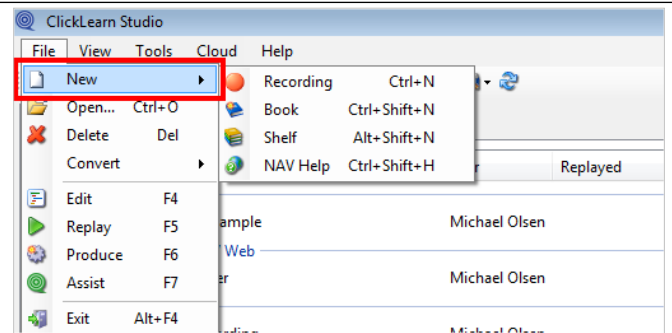
4. NAV Help

4.1. Create a NAV Help project

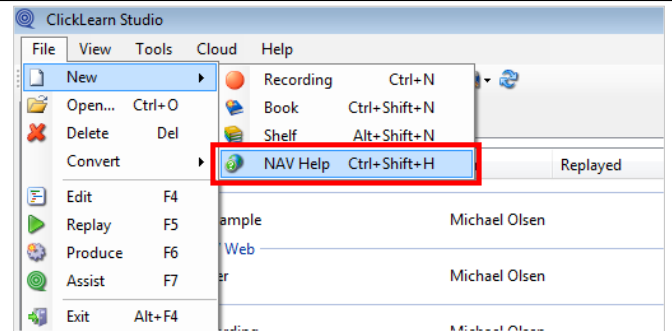
Click on the menu **File**.
You may also press **Alt+F**.



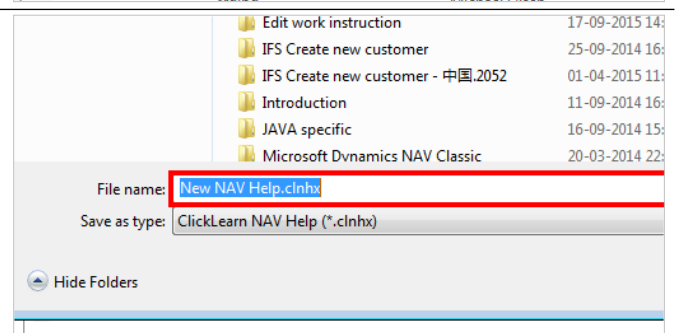
Click on the menu **New**.



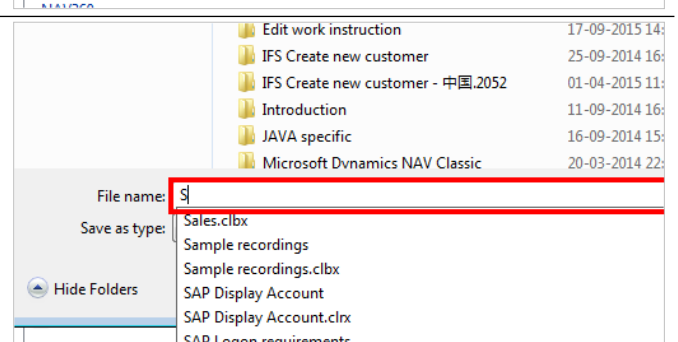
Click on the menu **NAV Help**.



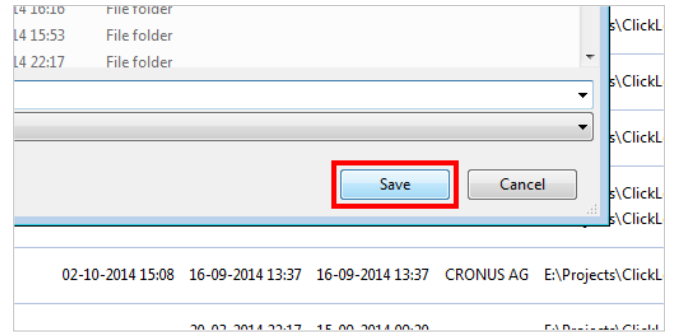
Click on the input field **File name:**.
You may also press **ALT+N**.



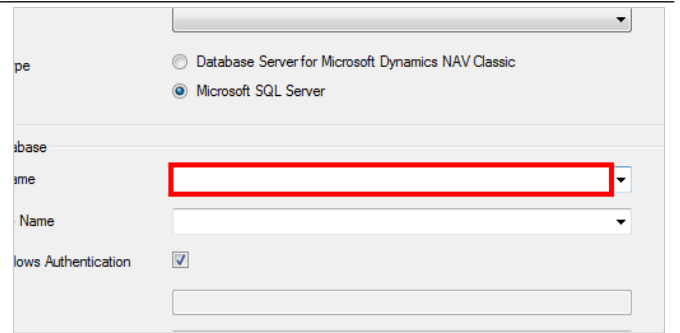
Enter a help project name.



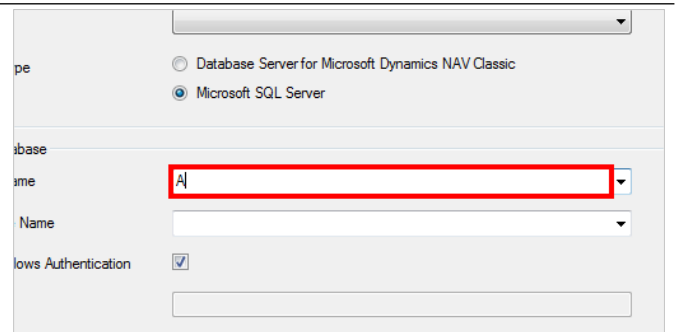
Click on the button **Save**.
You may also press **Alt+S**.



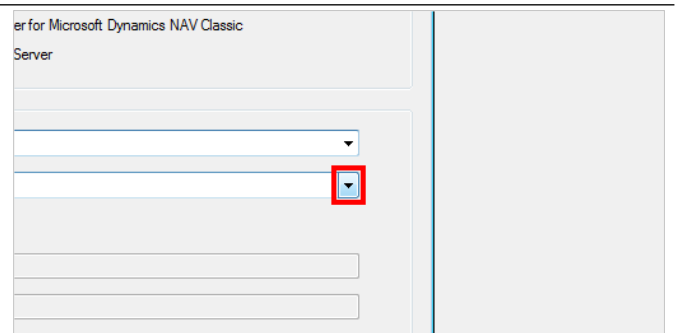
Click on the input field **Server Name**.



Enter **Server Name**.

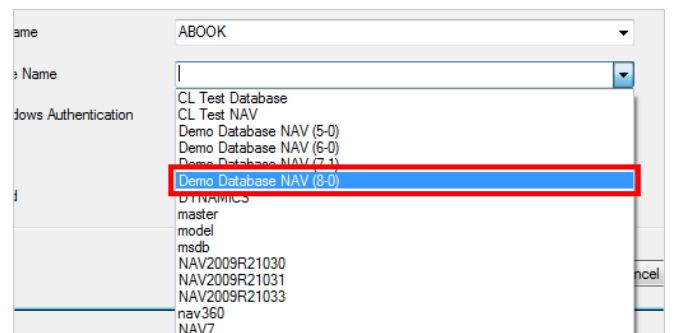


Click on the button **Database Name**.
You may also press **Alt+Down Arrow**.



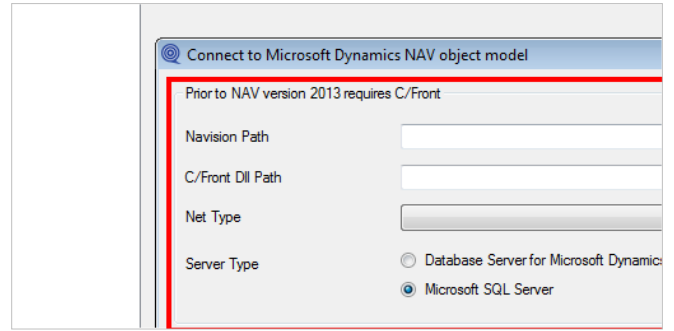
It is important to remember that this will only work for Microsoft Dynamics NAV 2013 or newer databases.

Select the NAV database



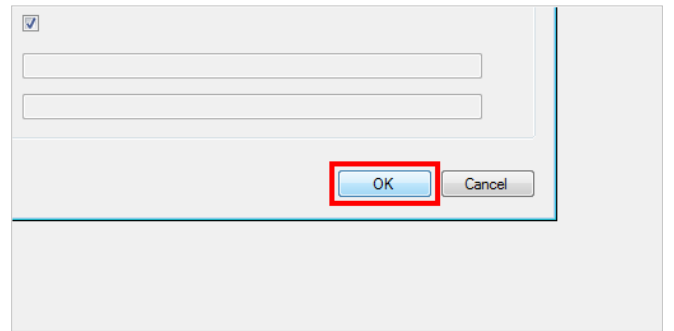
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Click on the group **Prior to NAV version 2013 requires C/Front** requires **C/Front**.

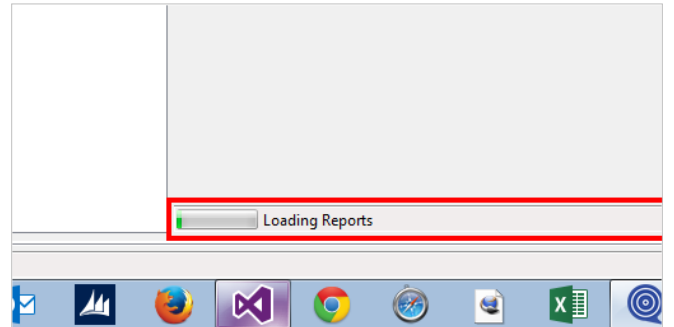


It is required to have the Microsoft Dynamics NAV SDK installed. If any of the fields in this group is entered incorrectly, you may experience ClickLearn being shutdown, as the CFront module may terminate the running application due to exceptions.

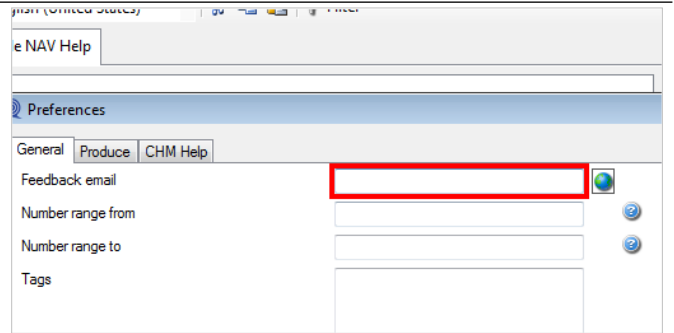
Click on the button **OK**.
You may also press **Alt+O**.



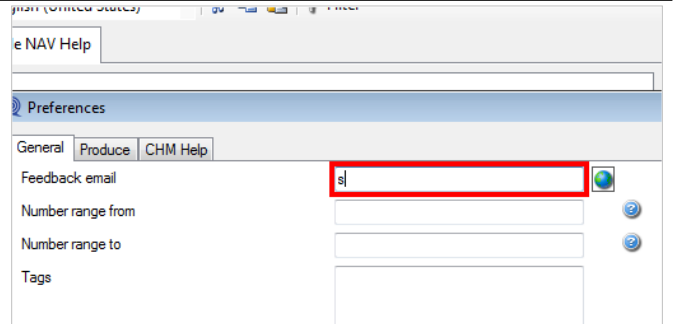
All object definitions needed is now loaded from the NAV Object Designer.



Click on the input field **Feedback email**.

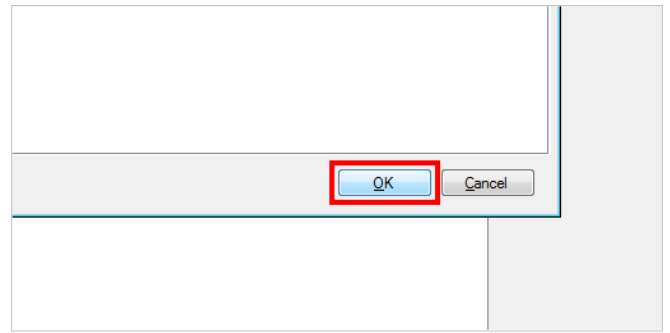


Enter **Feedback email**.

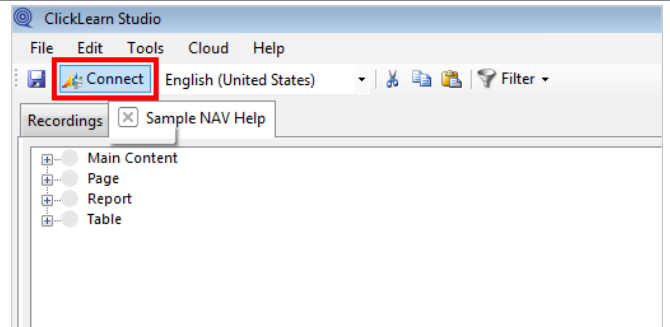


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Click on the button **OK**.
You may also press **Alt+O**.

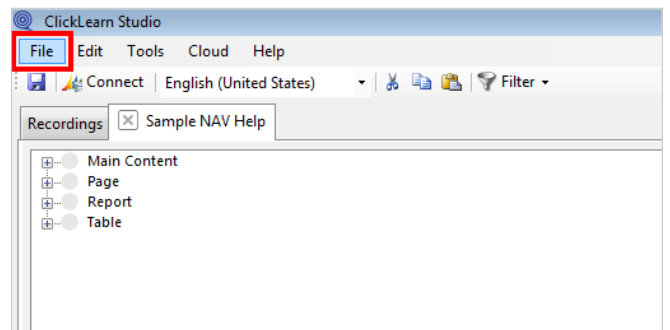


Move the mouse to the button **Connect**.

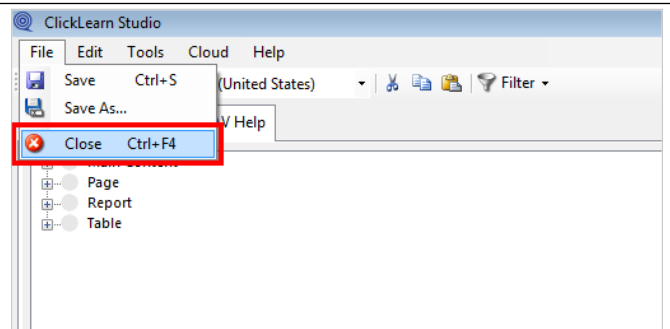


If changes are made in your NAV system, you need to update your help project. This is done by clicking this button.

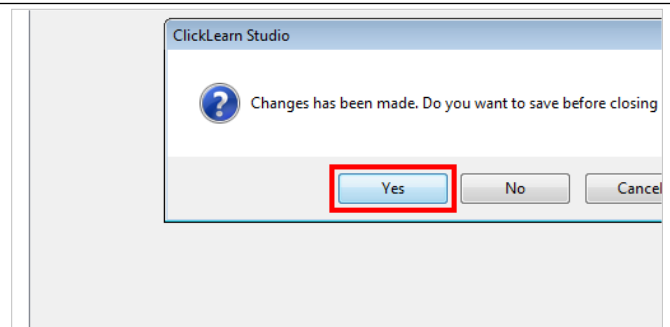
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

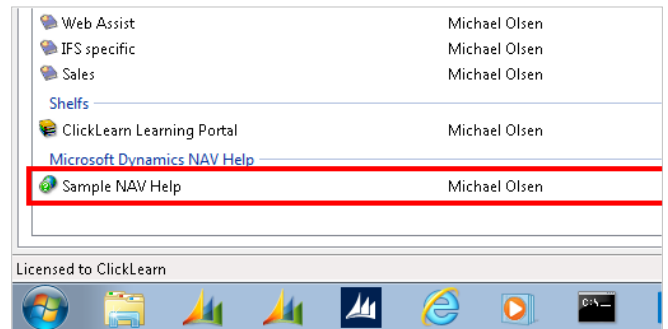


Click on the button **Yes**.
You may also press **Alt+Y**.

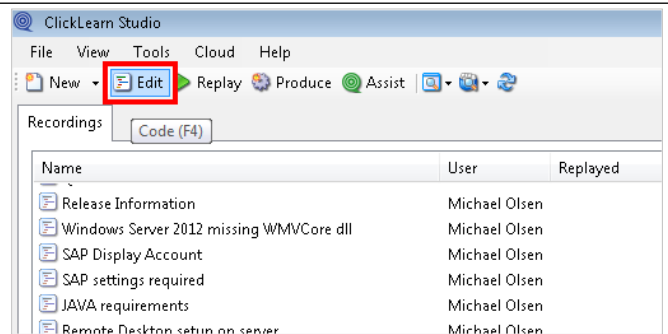


4.2. Edit the main content

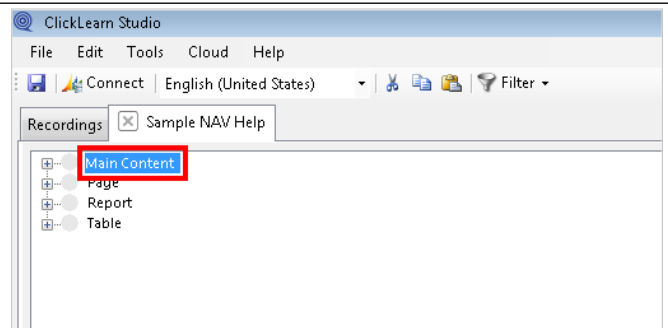
Click on the list element **Sample NAV Help**.



Click on the button **Edit**.
You may also press **Alt+D**.

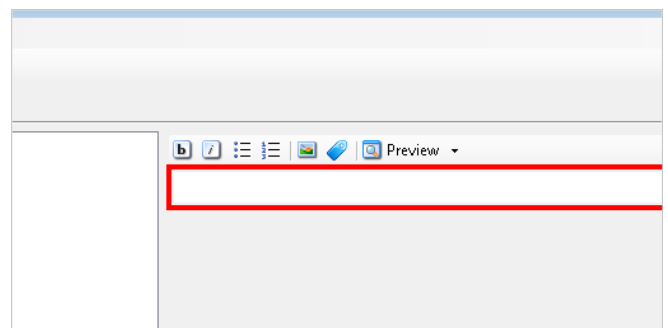


Click on the folder **Main Content**.



4.2.1. Writing content and adding images

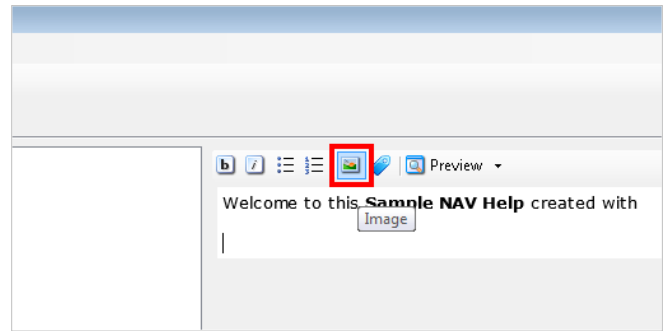
Set focus to the content area.



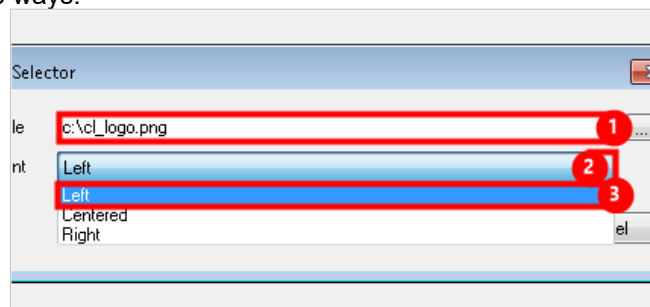
Here you may type in your content and use the text formatting features.

It is also possible to insert images.

Click on the button **Image**.

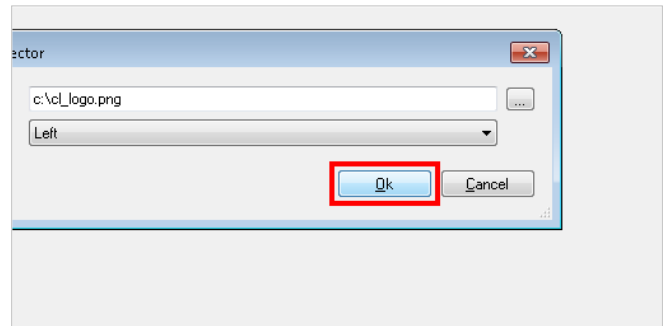


Images may be aligned in 3 ways.



1. Click on the input field **Image file**. - Enter **Image file**.
2. Click on the button **Placement**. You may also press **Alt+Down Arrow**.
3. Click on the list element **Left**.

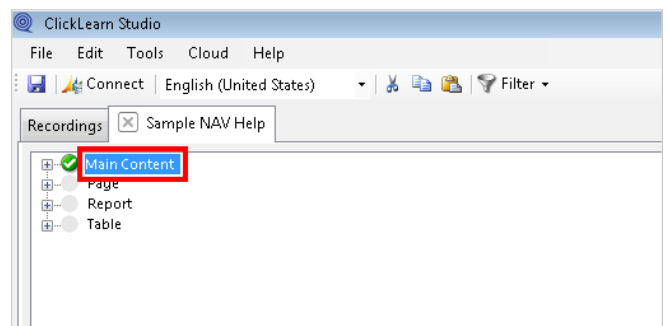
Click on the button **Ok**.
You may also press **Alt+O**.



In this example, more text is now added.

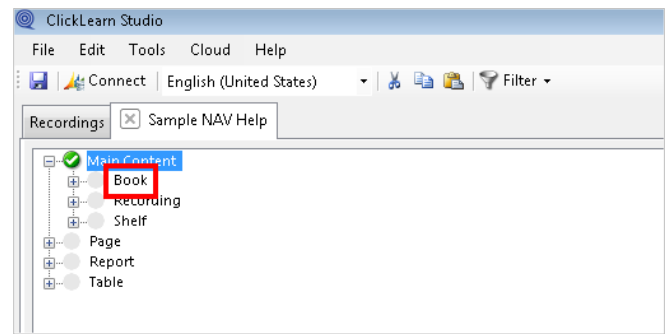
4.2.2. Adding walkthroughs

Double click on the folder **Main Content**.



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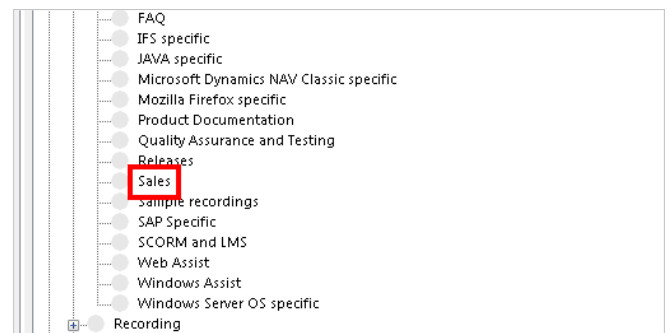
Double click on the folder **Book**.



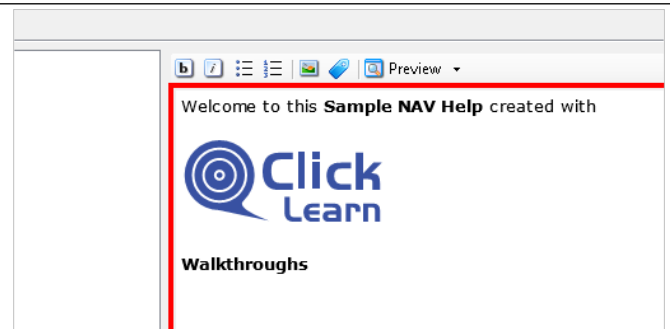
You may add recordings, books and shelves to the main content. This will have ClickLearn produce a walkthrough for each recording.

You will find the items available as nodes under the main content node.

Click and hold the left mouse button on the folder **Sales**.

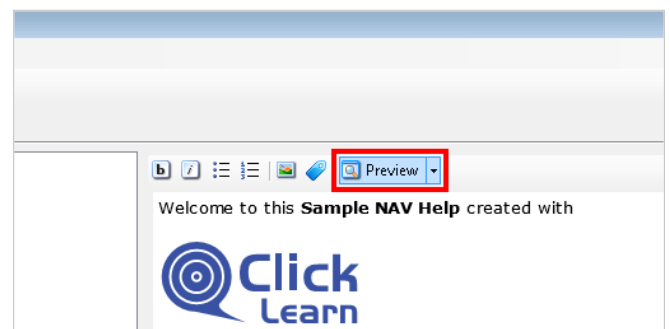


Release the left mouse button within the content.

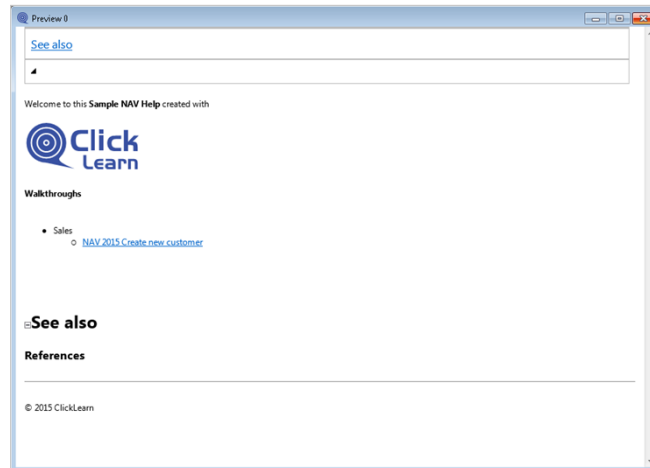


Throughout the NAV help module, you are able to preview the content created before producing the final help package.

Click on the button **Preview**.



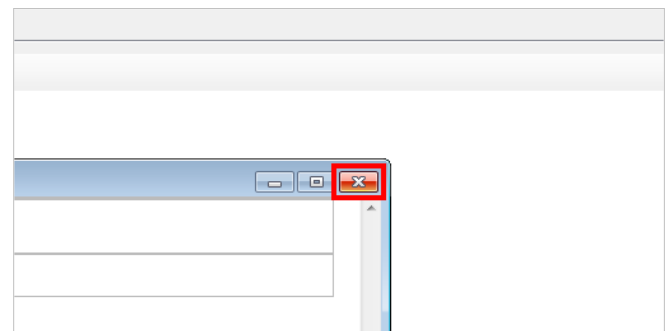
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Preview of the main content

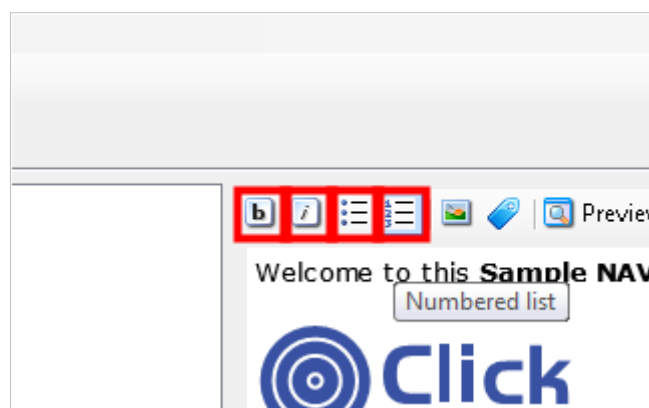
Notice how the book inserted automatically unfolds all recordings in the book.

Click on the button **Close**.



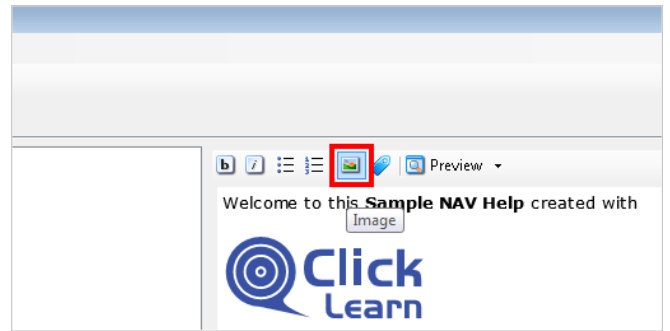
4.2.3. Text formatting

The NAV Help module provides simple yet powerful formatting features.



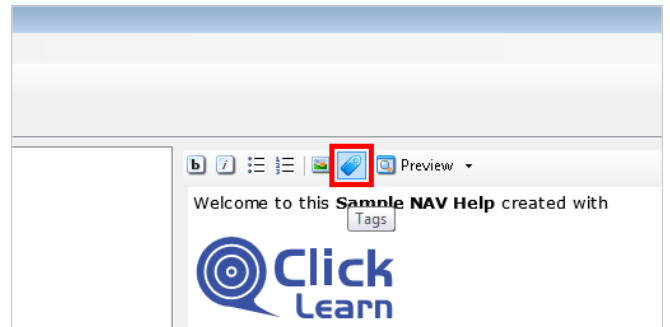
- Move the mouse to the button **Bold**.
- Move the mouse to the button **Italic**.
- Move the mouse to the button **Bullet list**.
- Move the mouse to the button **Numbered list**.

Move the mouse to the button **Image**.



Images may be inserted and aligned within the content.

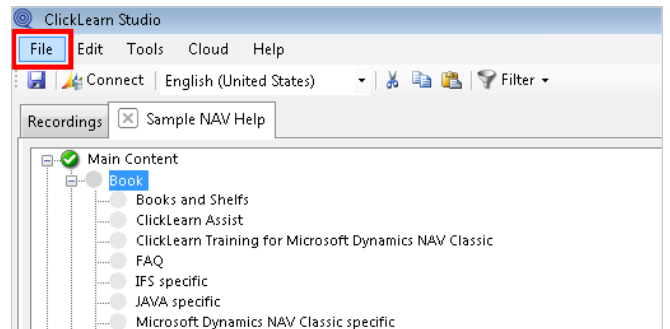
Move the mouse to the button **Tags**.



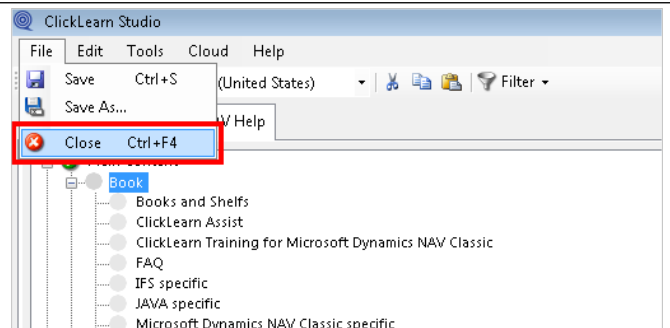
Tags will be explained separately in The help tagging system.

4.2.4. Save the project

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

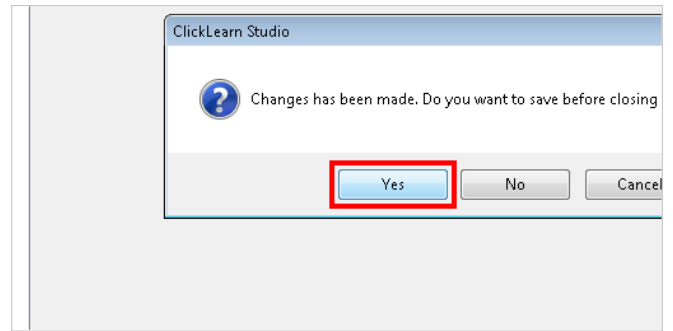


Click on the menu **Close**.



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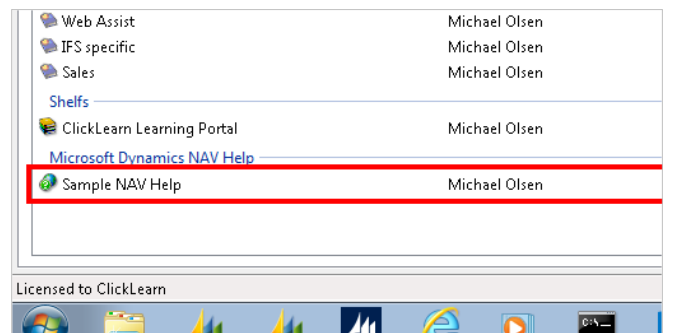
Click on the button **Yes**.
You may also press **Alt+Y**.



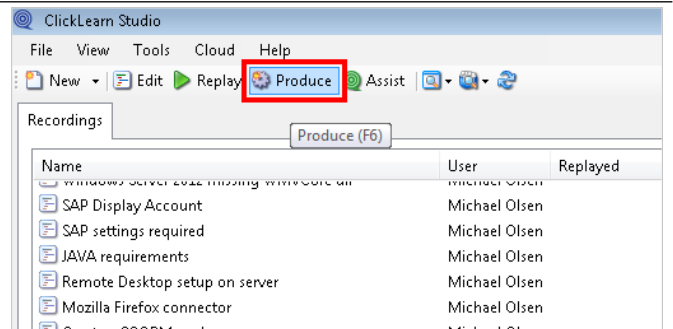
4.3. Produce NAV Help

4.3.1. Produce the help package

Click on the list element **Sample NAV Help**.

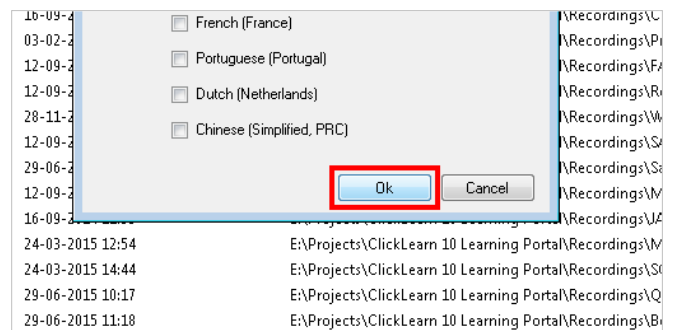


Click on the button **Produce**.
You may also press **Alt+U**.



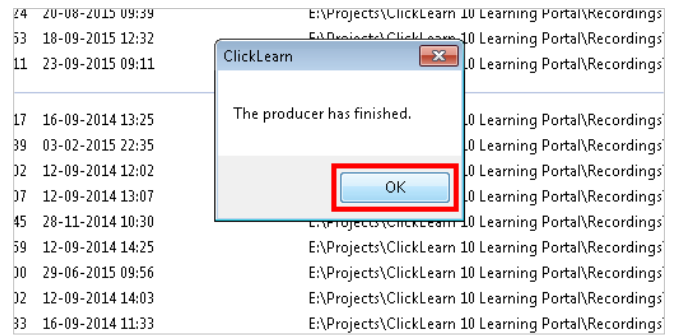
When producing, it is possible to produce one package including many languages.

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



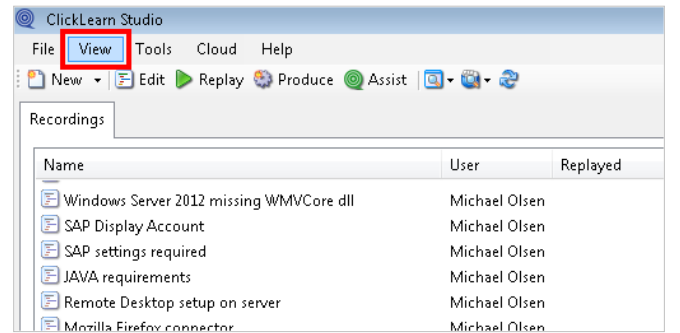
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Click on the button **OK**.

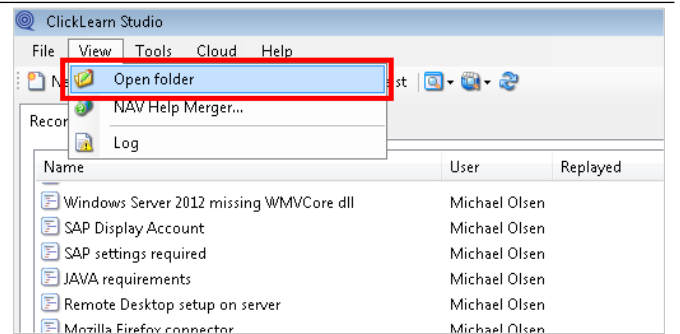


4.3.2. The produced help package

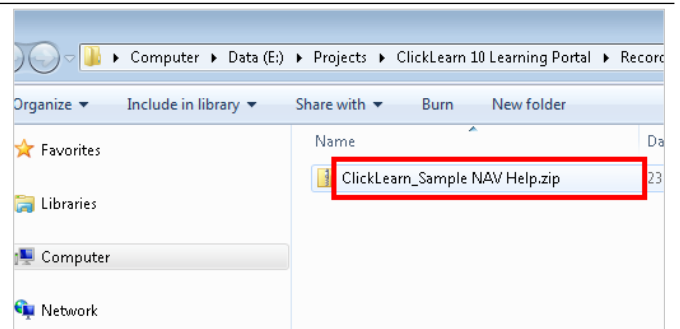
Click on the menu **View**.
You may also press **Alt+V**.



Click on the menu **Open folder**.



Click on the input field **Name**.

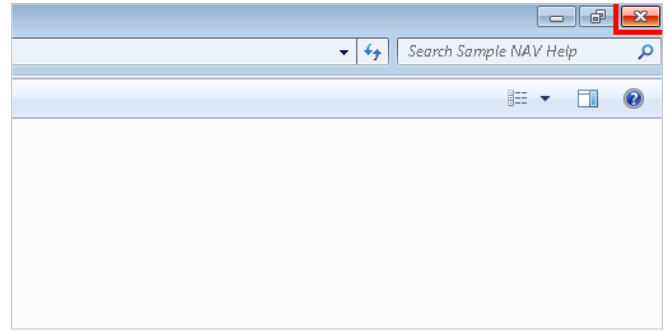


This file is a plain zip file, which you may copy to the server, where the Dynamics NAV help server is running.

On the server, you may use the free ClickLearn NAV Help Merger in order to install the help package.

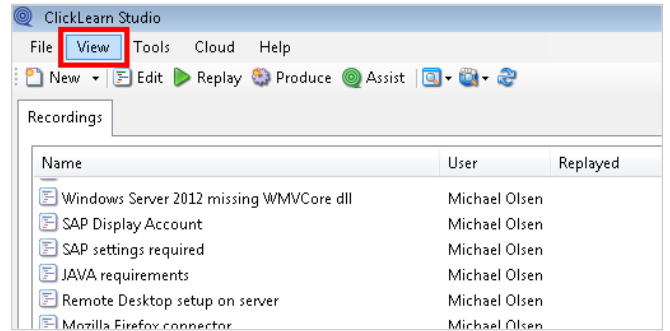
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Click on the button **Close**.

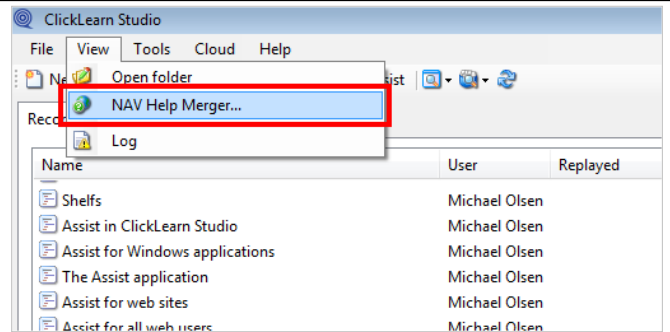


In this case, we have the Dynamics NAV Help server running on the local machine. Therefore we can directly start the NAV Help merger.

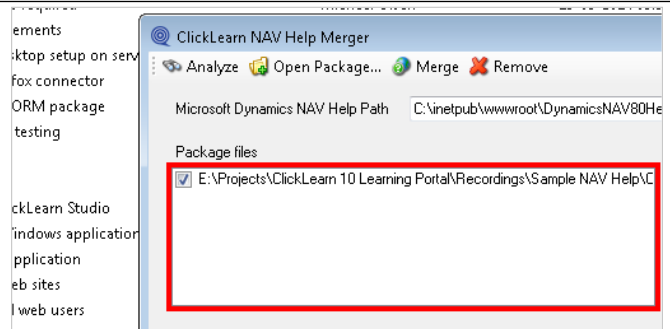
Click on the menu **View**.
You may also press **Alt+V**.



Click on the menu **NAV Help Merger...**

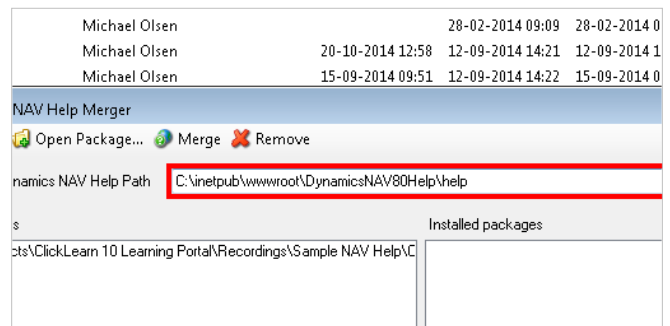


Click on the list **Package files**.



This is the package that we want to merge into the help server.

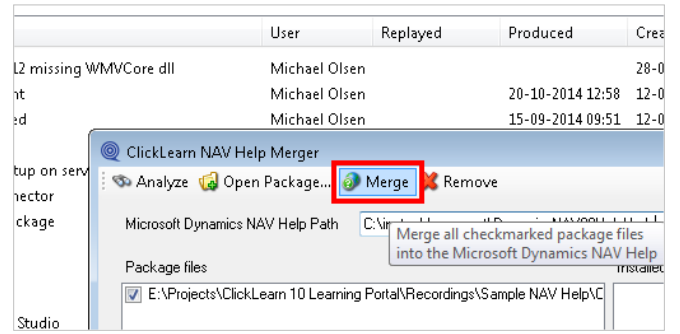
Click on the input field **Microsoft Dynamics NAV Help Path**.



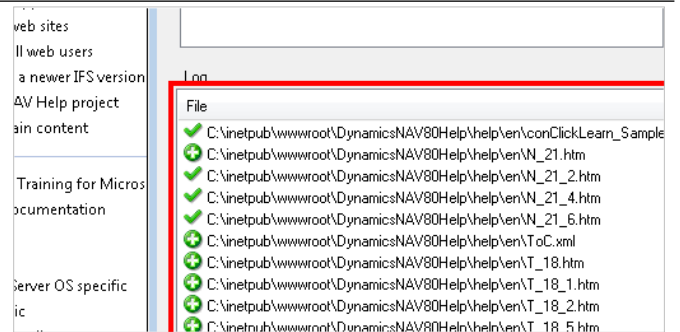
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Make sure that the path is correct, as to where the help files are located on the server.

Click on the button **Merge**.

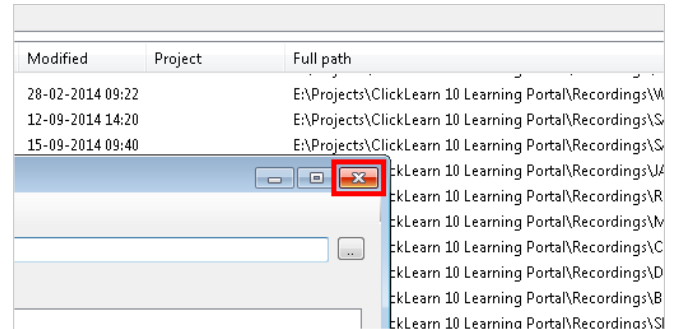


Click on the log area.



The log will show exactly what has been done. How many files has been copied into the NAV help directories and how many have been modified.

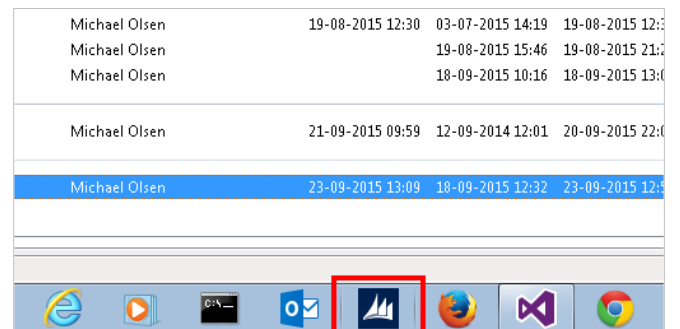
Click on the button **Close**.



4.3.3. How it looks in the online help system

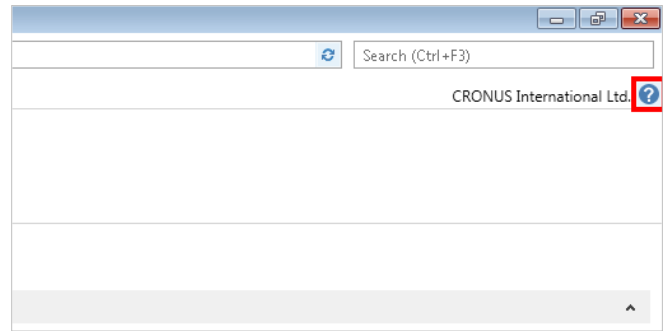
Let's see how this appears in the NAV online help.

Click on the button **Microsoft Dynamics NAV 2015**.

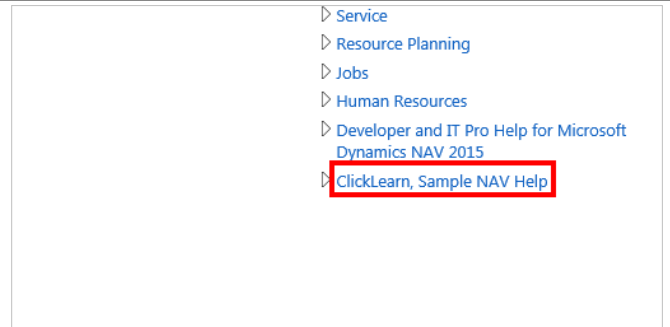


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Click on the button **Microsoft Dynamics NAV Help**.

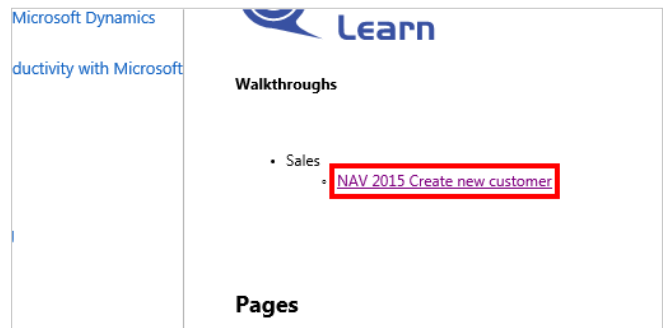


Click on the link **ClickLearn, Sample NAV Help**



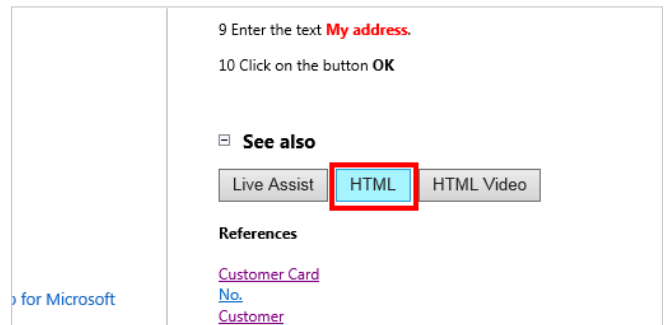
As you can see, the help merged into NAV also includes the menu structure to the left, as well as the content to the right.

Click on the link **NAV 2015 Create new customer**



The walkthrough conforms to the NAV standard. Additionally you will have access to the ClickLearn content for walkthroughs, including images, video content and a live assistant.

Click on the button **HTML**

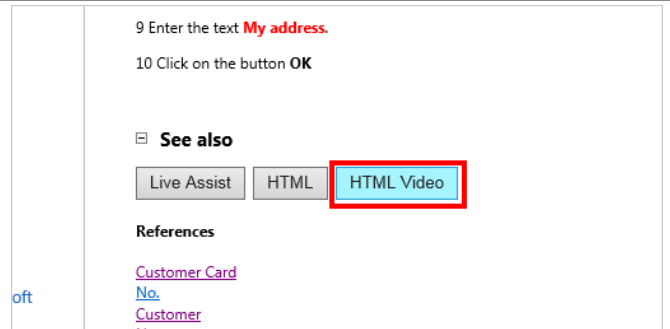


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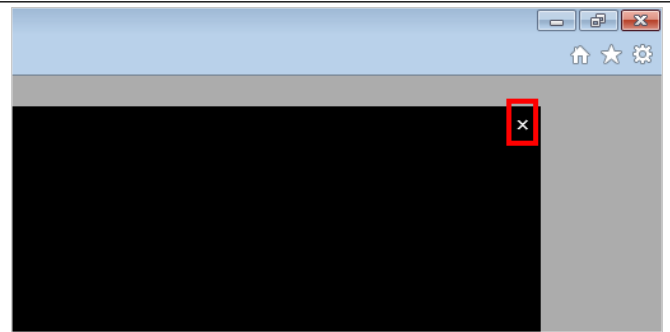
Close the content.



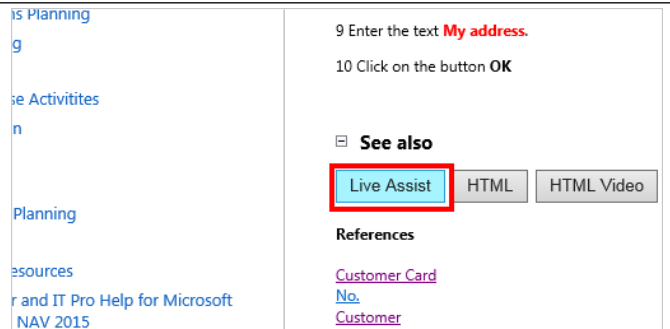
Click on the button **HTML Video**



Close the content.



Click on the button **Live Assist**



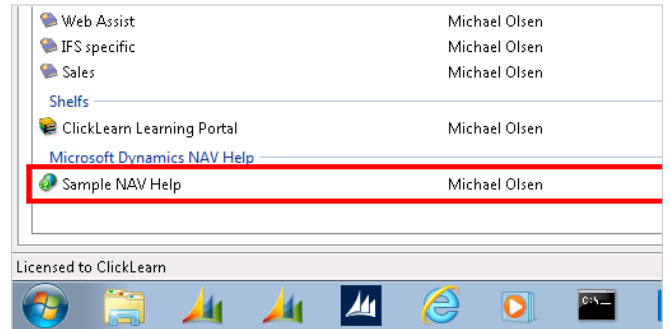
Selecting the live assistant from within the online help, will start the assistant, and automatically shift back to the live NAV application to guide the user.

Click on the tab **Home**.

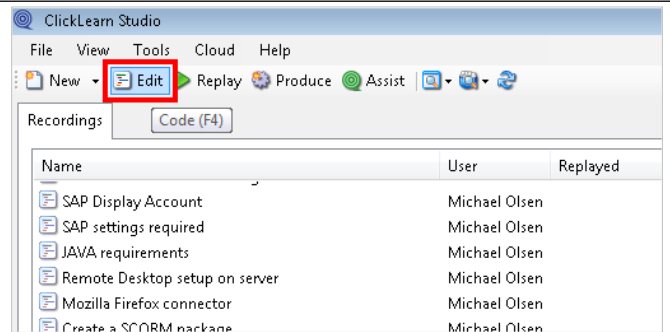


4.4. Extend standard NAV help topics

Click on the list element **Sample NAV Help**.



Click on the button **Edit**.
You may also press **Alt+D**.

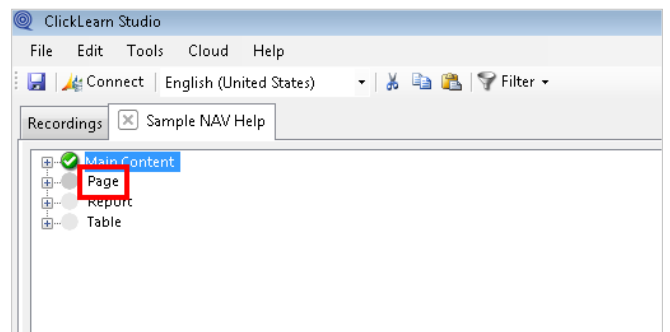


The help project will have access to all pages, reports and tables from the Object Designer.

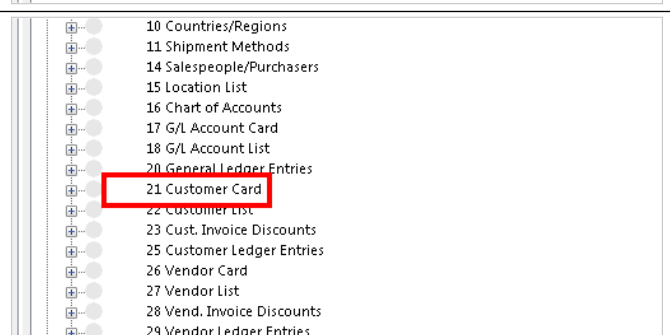
It is possible to create content on any level, either creating new or adding to the help provided by Microsoft.

4.4.1. Pages

Double click on the folder **Page**.

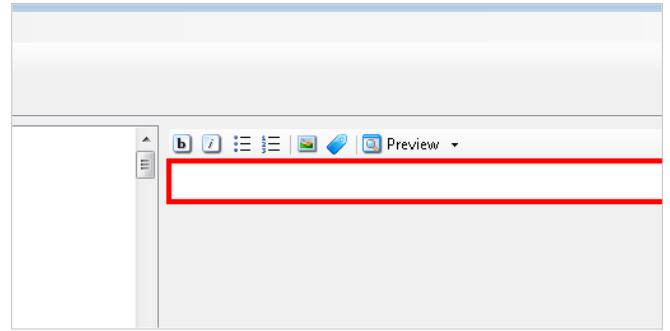


Double click on the folder **21 Customer Card**.

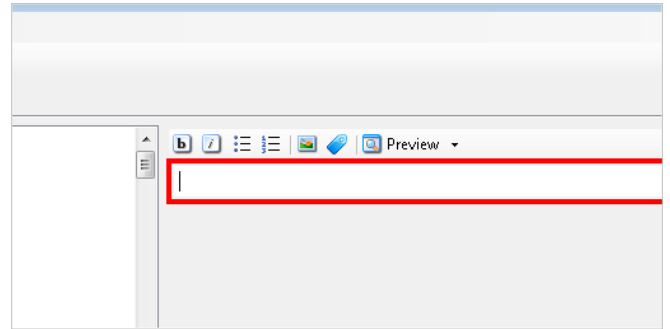


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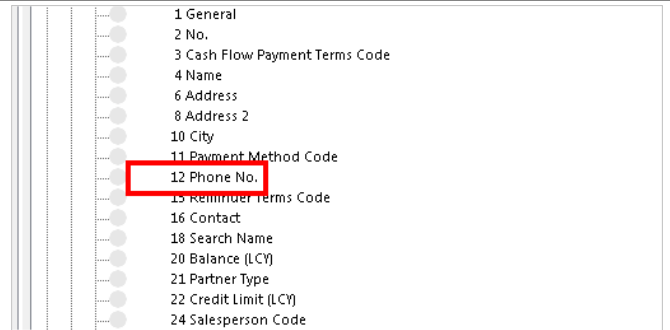
Click on the content area.



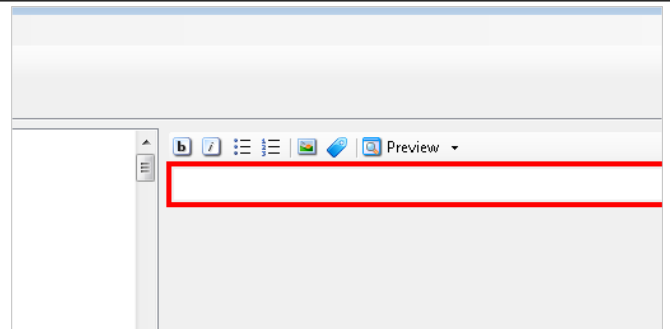
Enter **the content**.



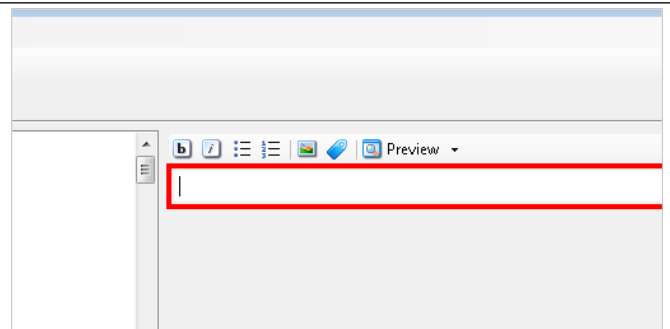
Click on the folder **12 Phone No..**



Click on the content area.



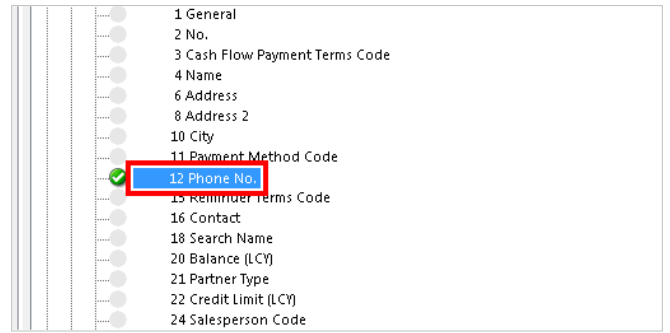
Enter **the content**.



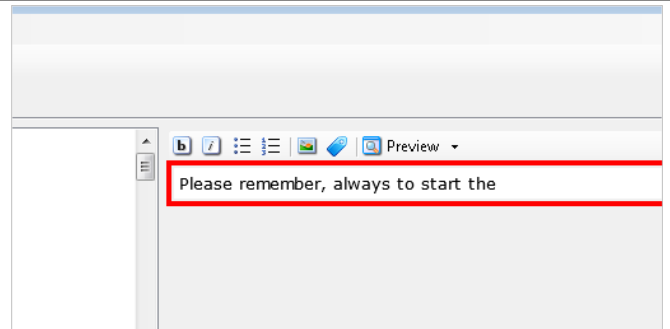
Instead of writing the text Phone No. yourself, it is possible to drag the caption in from the nodes to the left.

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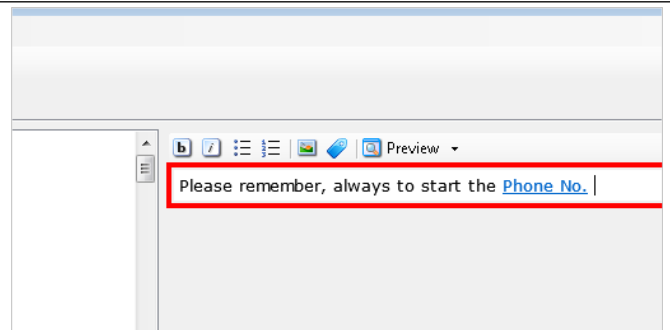
Click and hold the left mouse button on the folder **12 Phone No.**



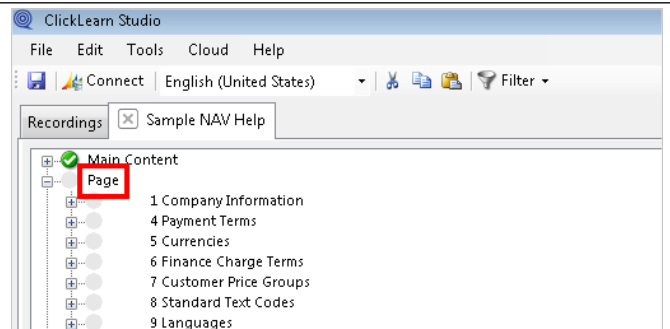
Release the left mouse button on the content area.



Enter the content.

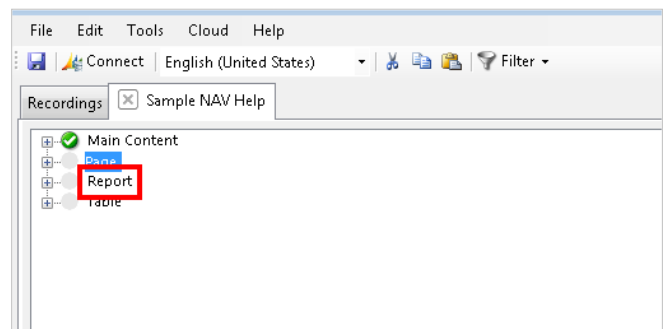


Double click on the folder **Page**.

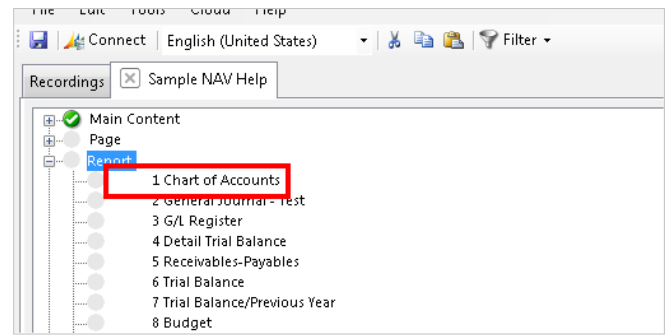


4.4.2. Reports

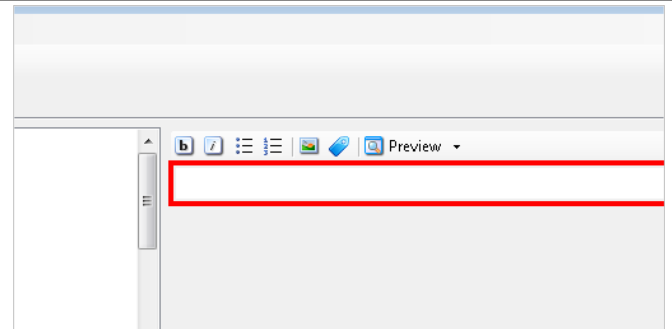
Double click on the folder **Report**.



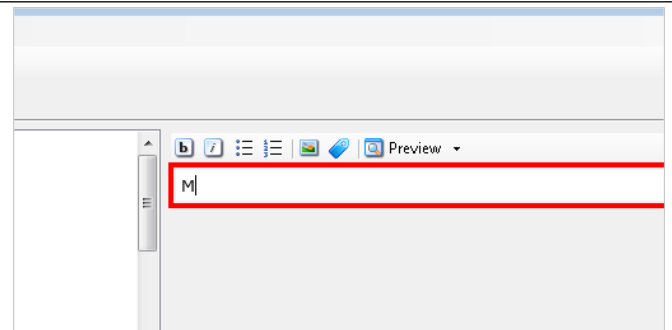
Click on the folder **1 Chart of Accounts.**



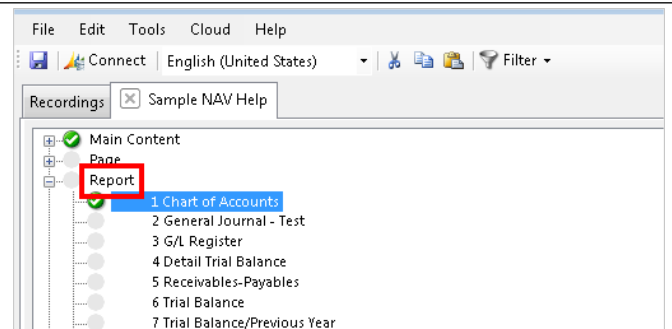
Click on the content area.



Enter the content.

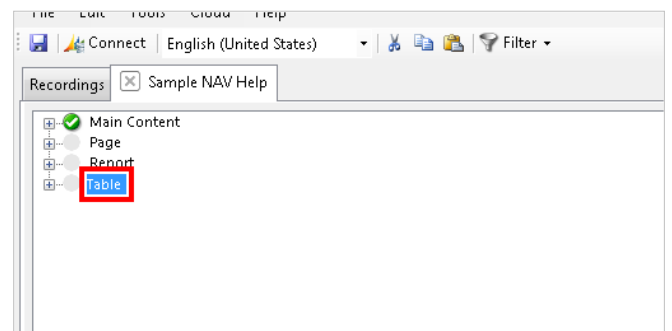


Double click on the folder **Report.**

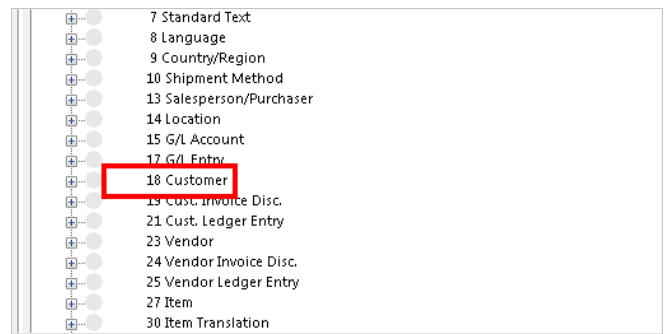


4.4.3. Tables

Double click on the folder **Table.**

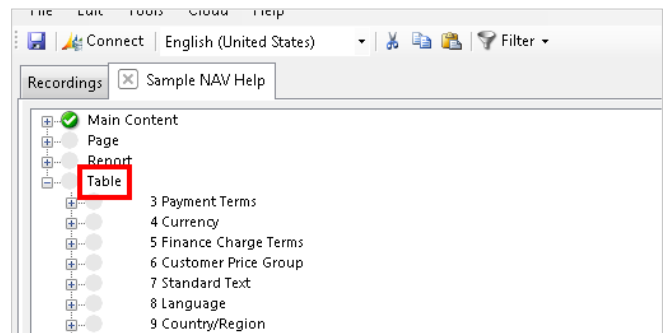


Double click on the folder **18 Customer.**

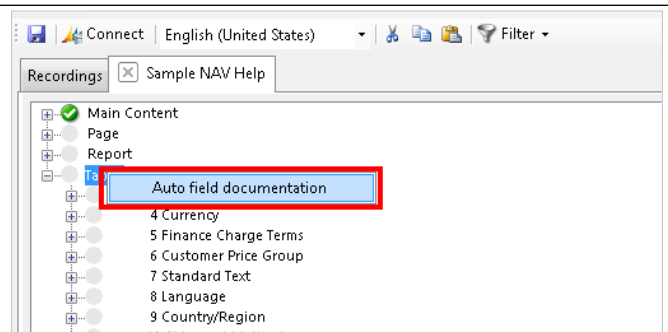


4.4.3.1. Auto field documentation

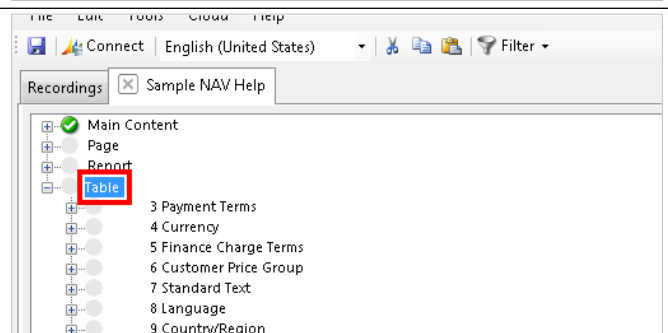
Right click on the folder **Table.**



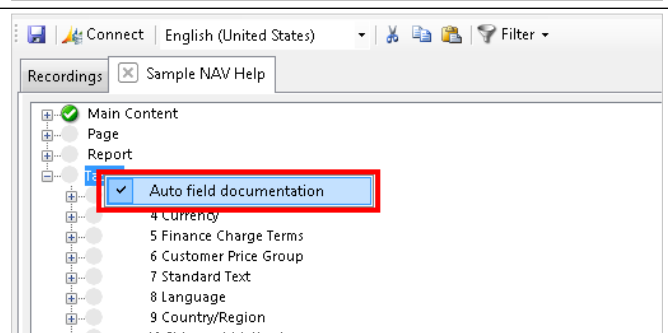
Click on the menu **Auto field documentation.**



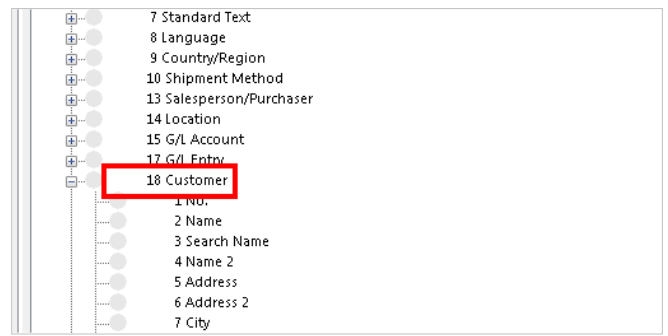
Right click on the folder **Table.**



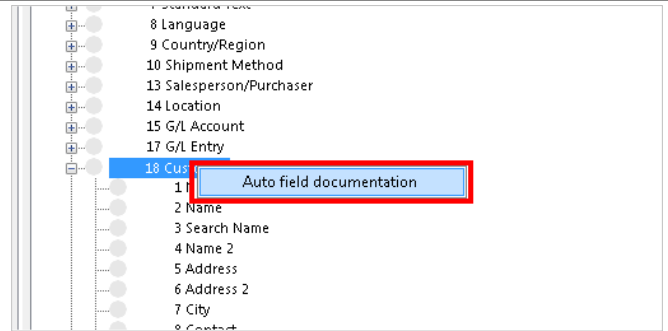
Click on the menu **Auto field documentation.**



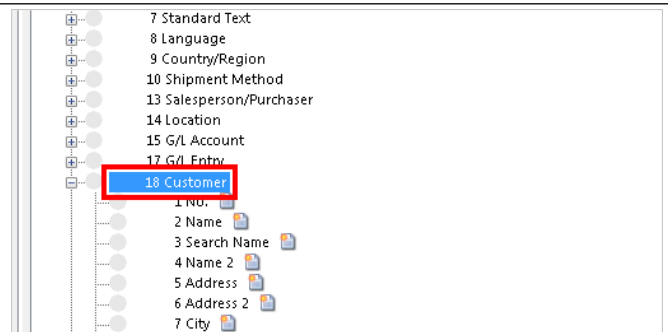
Right click on the folder **18 Customer.**



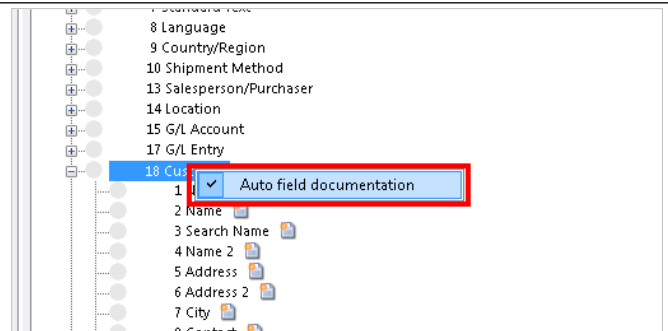
Click on the menu **Auto field documentation.**



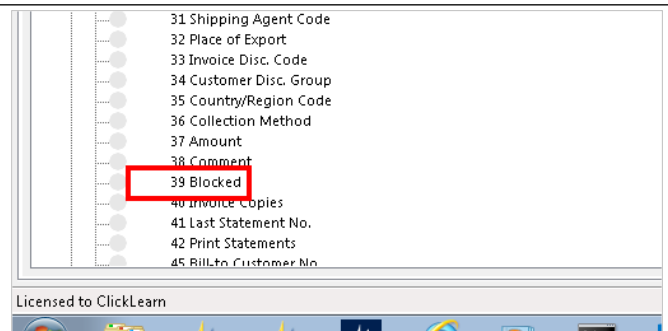
Right click on the folder **18 Customer.**



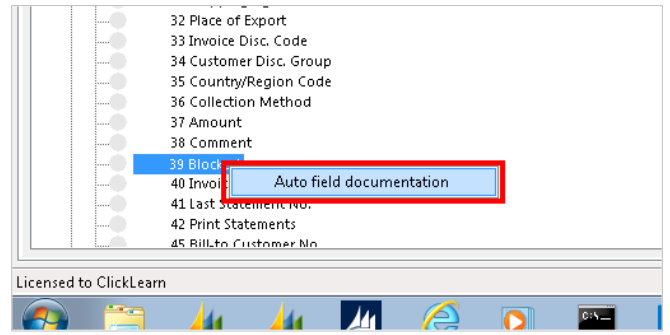
Click on the menu **Auto field documentation.**



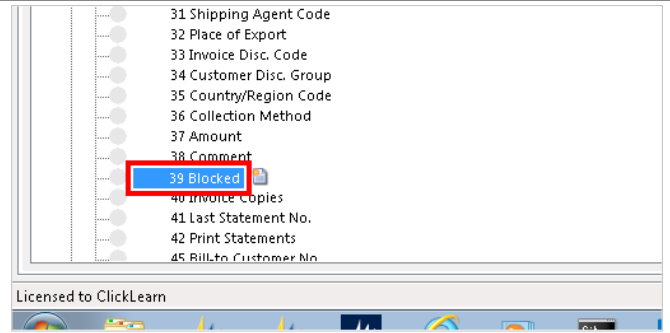
Right click on the folder **39 Blocked.**



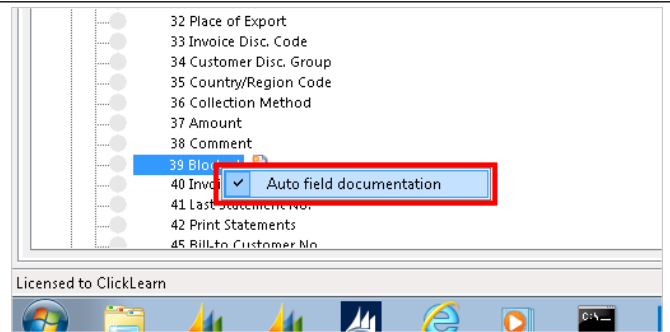
Click on the menu **Auto field documentation**.



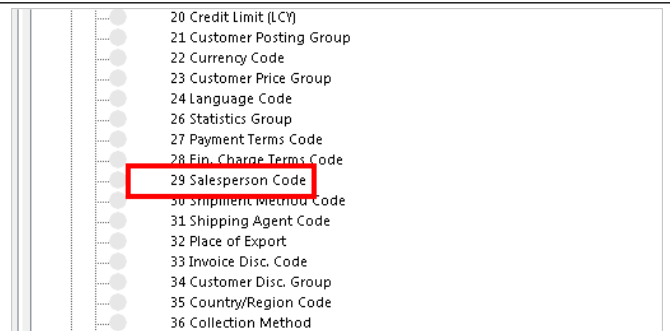
Right click on the folder **39 Blocked**.



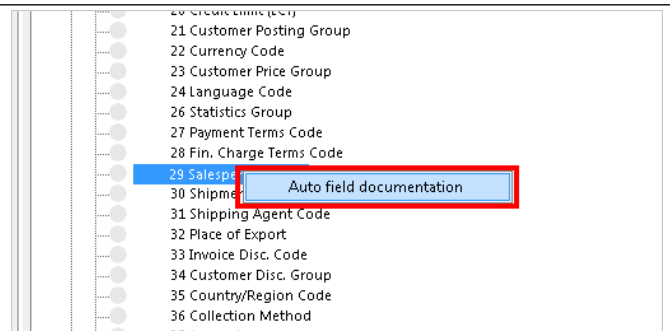
Click on the menu **Auto field documentation**.



Right click on the folder **29 Salesperson Code**.

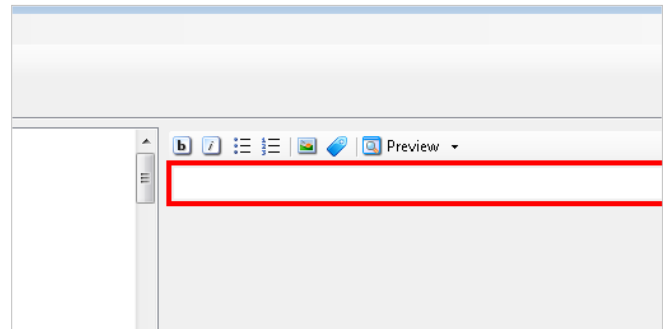


Click on the menu **Auto field documentation**.

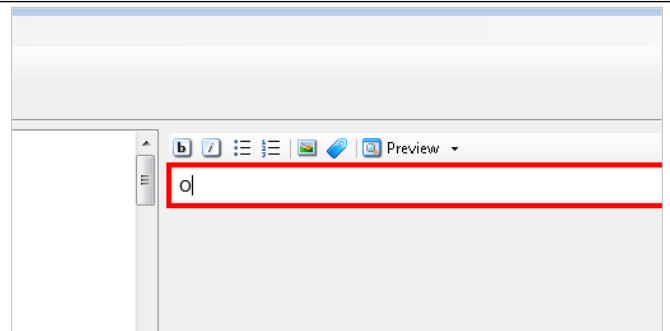


4.4.3.2. Write content

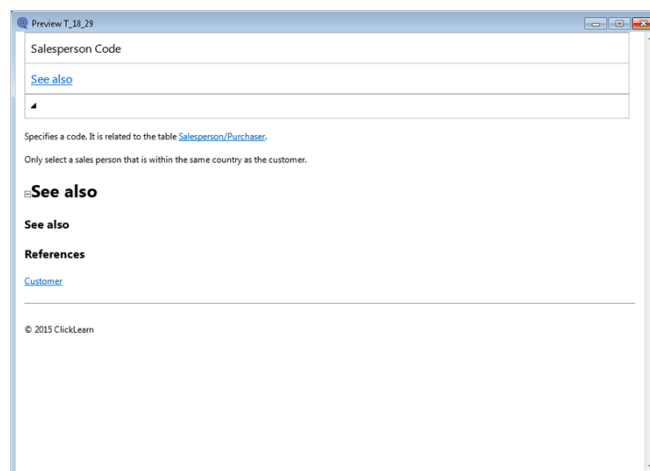
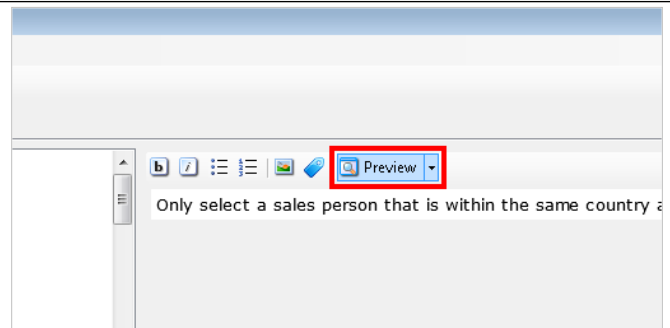
Click on the content area.



Enter **the content**.



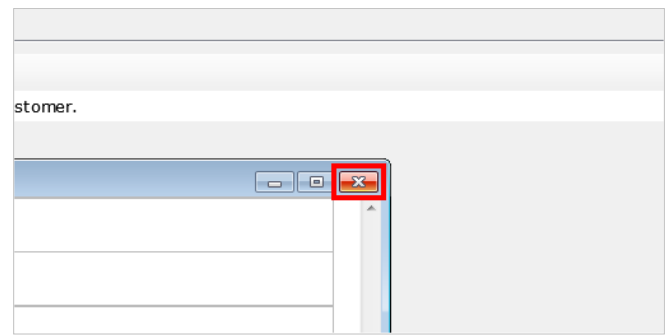
Click on the button **Preview**.



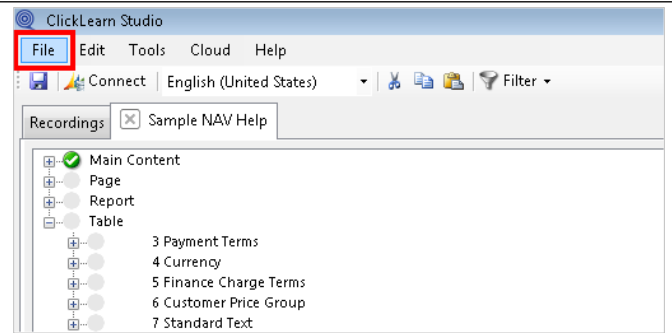
Preview of auto field documentation and custom content

Because the table field is a code field, the auto field documentation as added a text, including a link to the help topic for the table that holds the data required for this field.

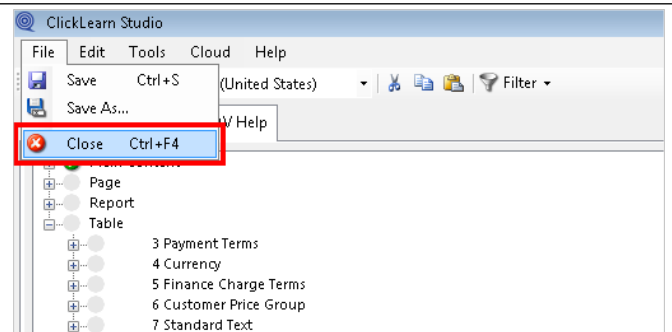
Click on the button **Close**.



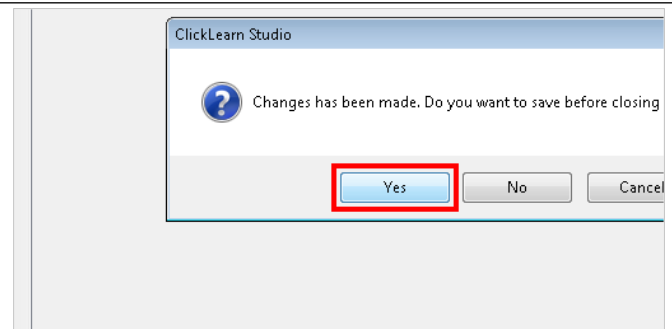
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



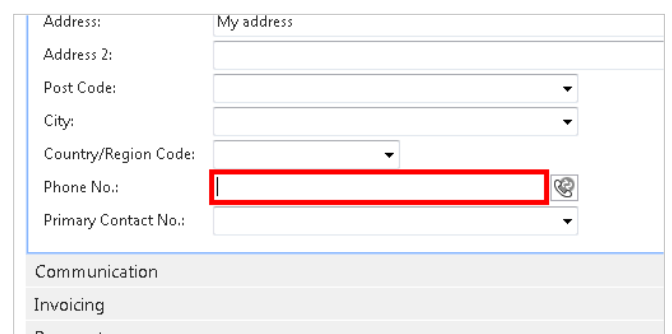
Click on the button **Yes**.
You may also press **Alt+Y**.



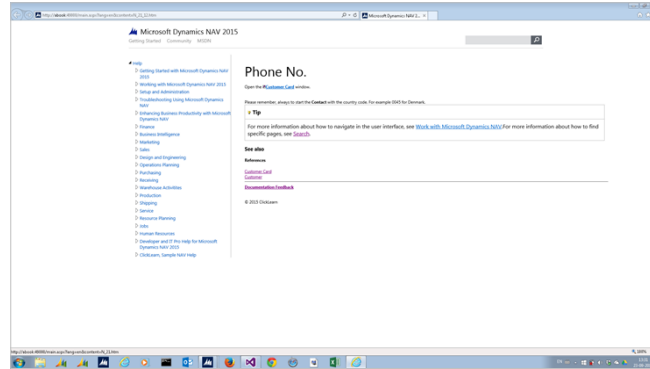
4.5. The extended help within NAV

With the Dynamics NAV client, on the customer card, we can now get access to the new help content.

Click on the textbox **Phone No.**



Press the **F1** key.



Page field help

Because Microsoft has not provided any specific help for the field on this page, the help package has provided a new help content.

Click on the link **Customer Card**

Click on the column header **ClickLearn, Sample NAV Help**

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Click on **Specific walkthroughs exists for this page.**

Customer Card Window

ClickLearn, Sample NAV Help

Specific walkthroughs exists for this page.

Open the [Customer Card](#) window.

Defines information for all your customers.

You must set up a card for each customer, on which you enter basic information.

The customer card help is provided by Microsoft. Here you will see how the content created in ClickLearn is added to the existing help page.

Click on the link **NAV 2015 Create new customer**

Sample NAV Help

[How to: Apply Customer Ledger Entries in Different Currencies](#)

[How to: Assign VAT Business Posting Groups to Customer Addresses](#)

[How to: Create Sales Quotes](#)

Reference

[Customer](#)

NAV 2015 Create new customer

[Documentation Feedback](#)

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When the help package includes walkthroughs recorded with ClickLearn, links is automatically generated, wherever possible.

4.6. The help tagging system

4.6.1. Introduction

The NAV Help module has a unique tagging system, that will allow help to be maintained for multiple targets, say for windows and web usage of NAV.

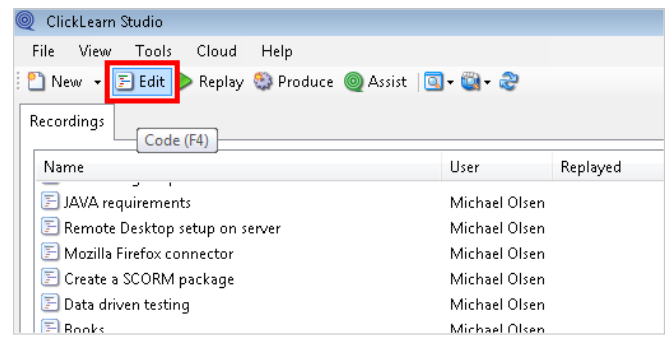
4.6.2. Setup tags

Click on the list element **Sample NAV Help**.

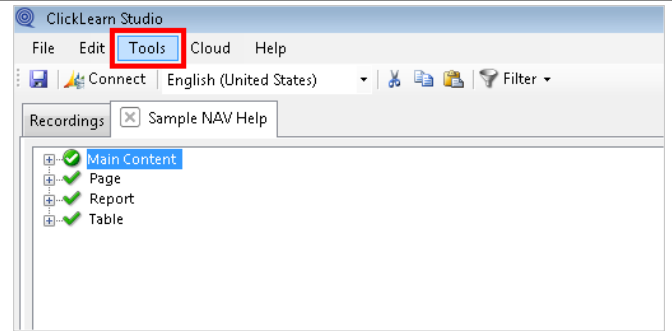
Web Assist	Michael Olsen
IFS specific	Michael Olsen
Sales	Michael Olsen
Shelfs	
ClickLearn Learning Portal	Michael Olsen
Microsoft Dynamics NAV Help	
Sample NAV Help	Michael Olsen

Licensed to ClickLearn

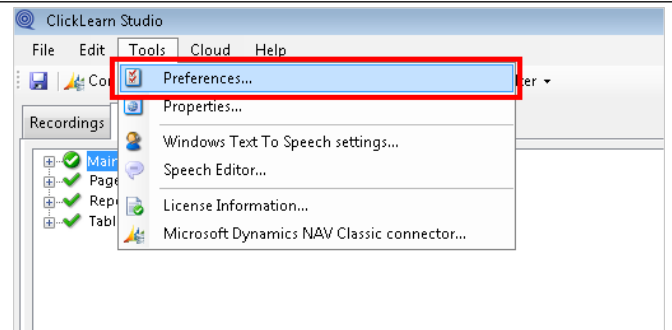
Click on the button **Edit**.
You may also press **Alt+D**.



Click on the menu **Tools**.



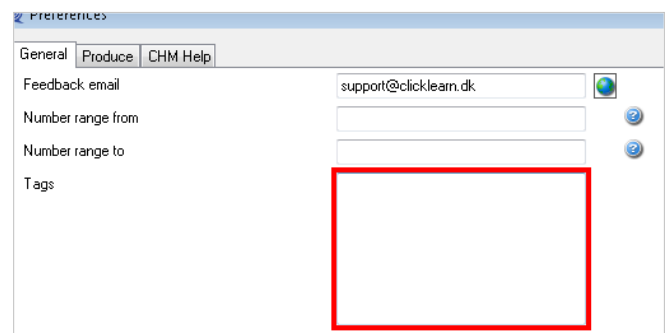
Click on the menu **Preferences...**



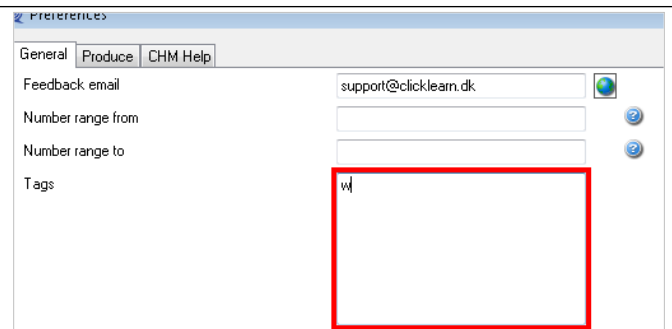
4.6.2.1. Tags for the editor

In this example, two tags will be setup for the editor.

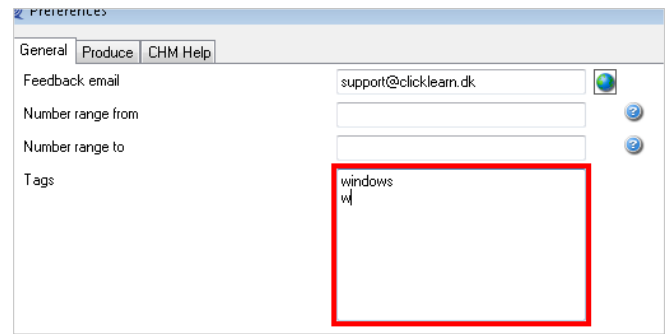
Click on the input field **Tags**.



Enter **Tags**. Press the **Enter** key.



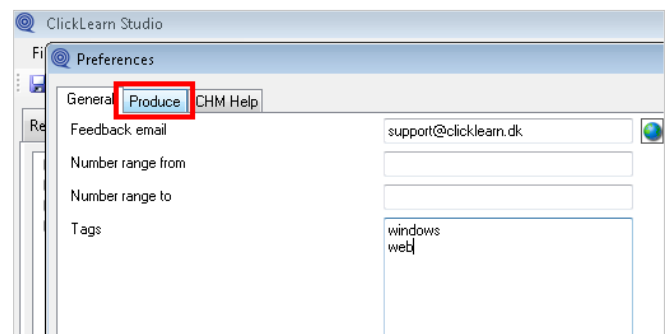
Enter **Tags**.



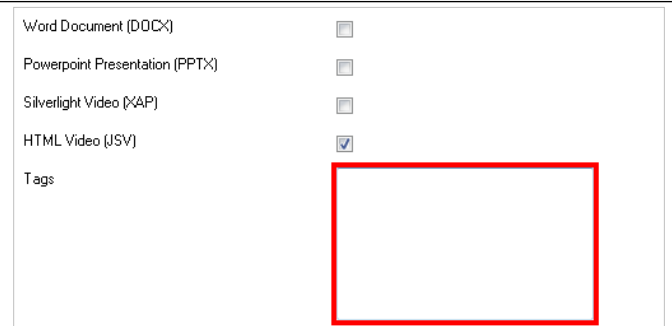
4.6.2.2. Tags for the producer

In this example the same two tags is setup for the production.

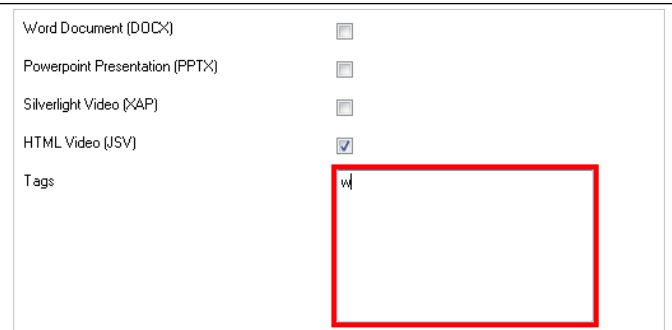
Click on the tab **Produce**.



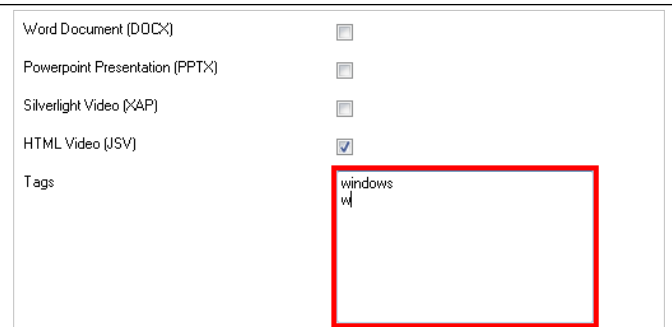
Click on the input field **Tags**.



Enter **Tags**. Press the **Enter** key.

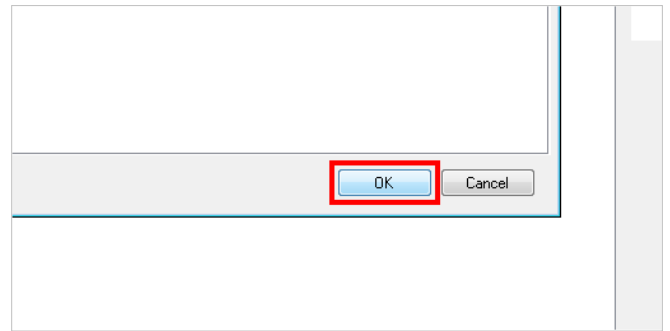


Enter **Tags**.



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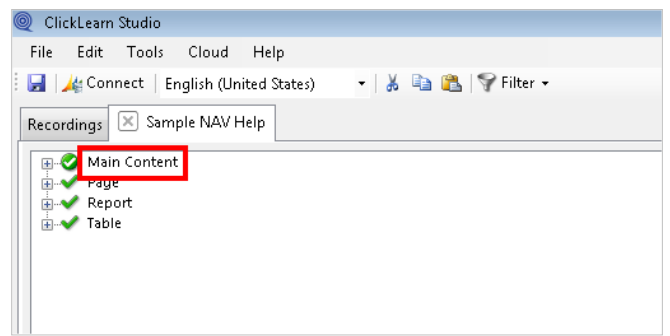
Click on the button **OK**.
You may also press **Alt+O**.



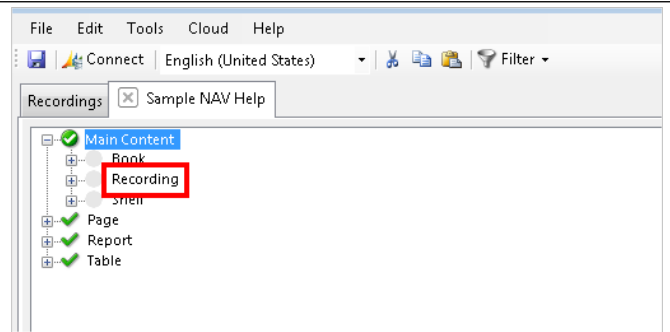
4.6.3. Use the tags in the content

To show how the tag system works, we start by adding a walkthrough recorded on the NAV Web Client.

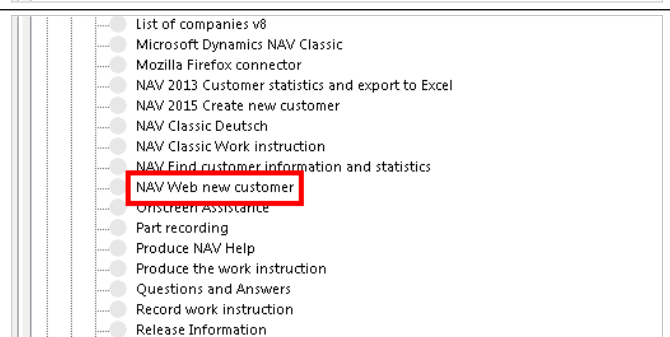
Double click on the folder **Main Content**.



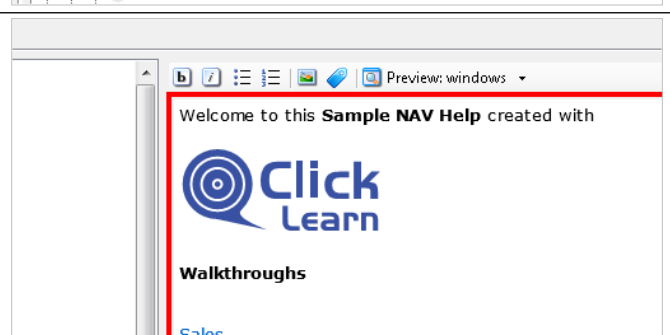
Double click on the folder **Recording**.



Click and hold the left mouse button on the folder **NAV Web new customer**.



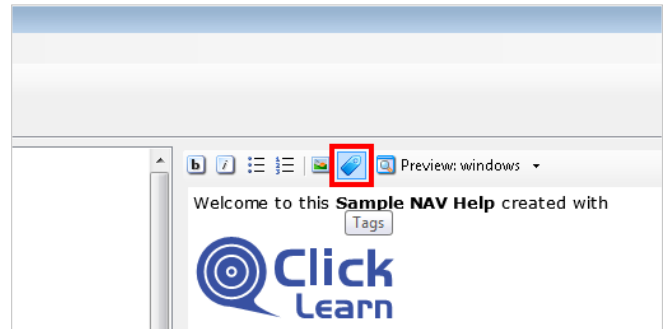
Release the left mouse button on the content area.



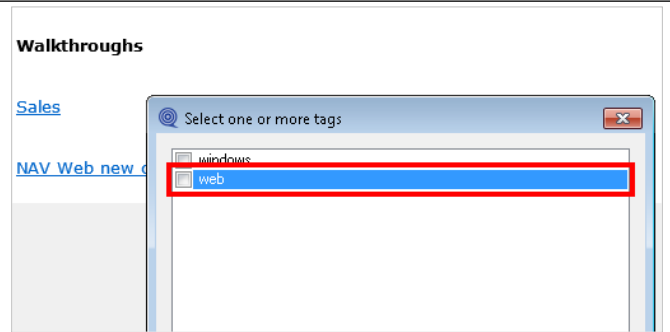
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To tag content, start by marking the content.

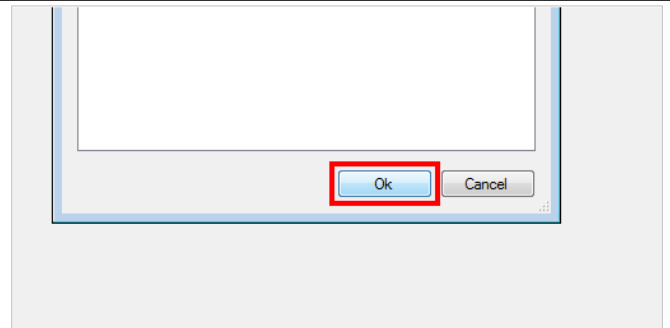
Click on the button **Tags**.



Click on the checkbox **web**.

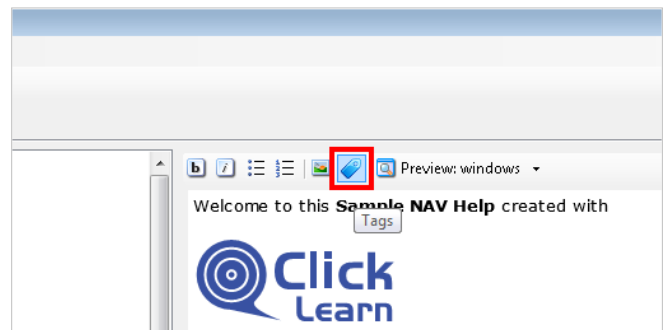


Click on the button **Ok**.
You may also press **Alt+O**.

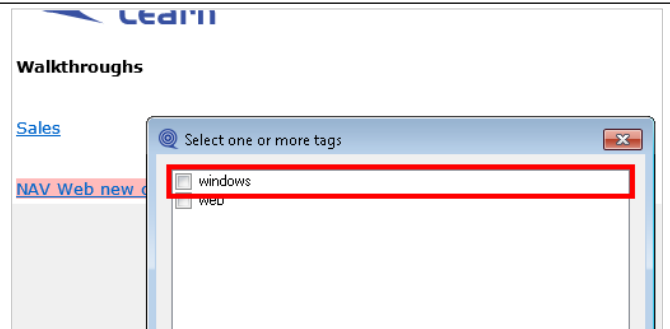


A different content area is now marked.

Click on the button **Tags**.



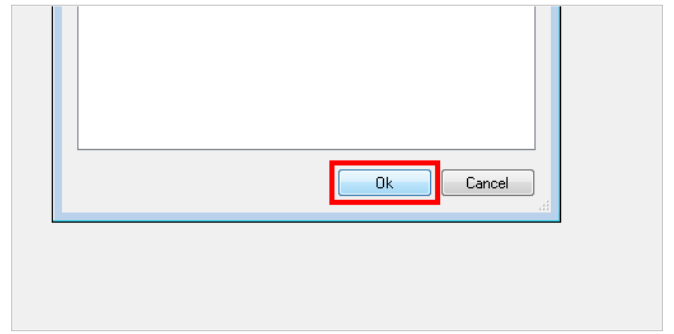
Click on the checkbox **windows**.



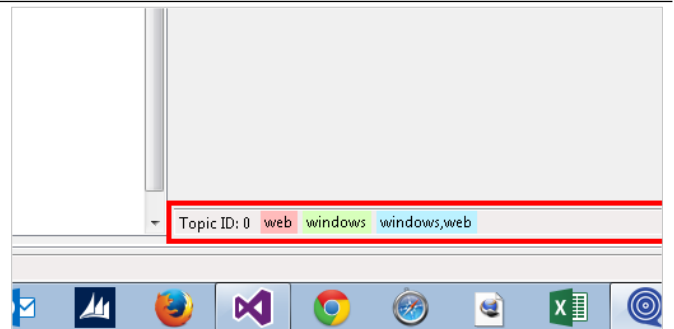
One or more tags may be selected, and it can even be done in multiple levels.

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



Click on the status bar



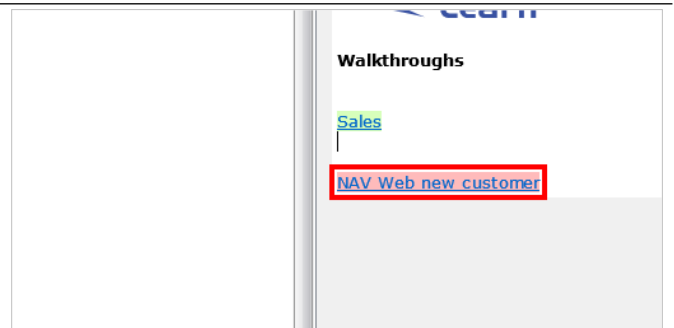
When tags has been defined you will be able to see the color codes at all times in the status bar.

If you need to change the tags for an already tagged area, just click in the area first.

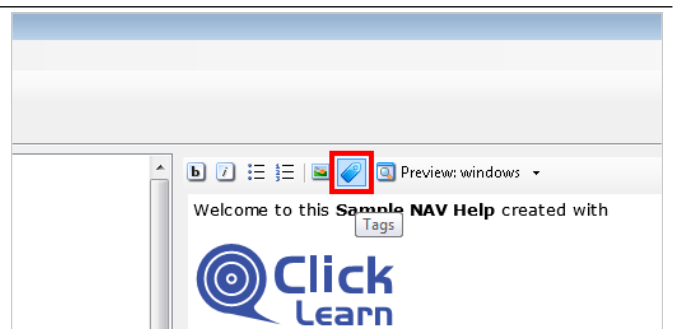
Move the mouse to the link **Sales**



Click on the link **NAV Web new customer**

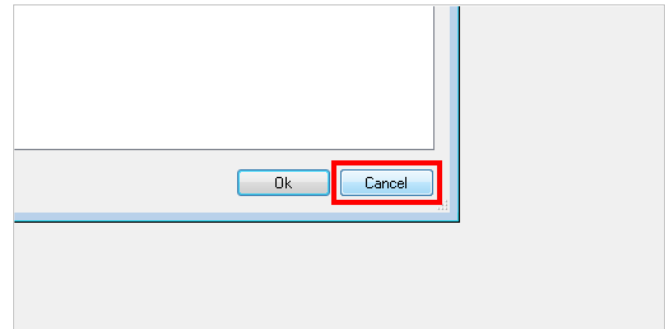


Click on the button **Tags**.



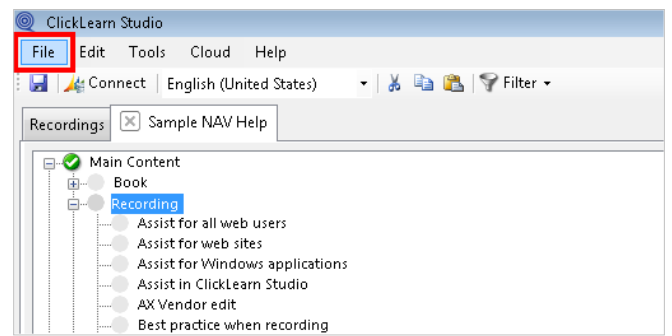
Changes can now be applied.

Click on the button **Cancel**.
You may also press **Alt+C**.

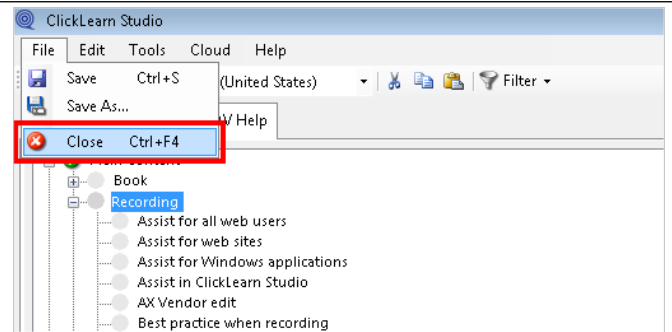


4.6.4. Save and produce

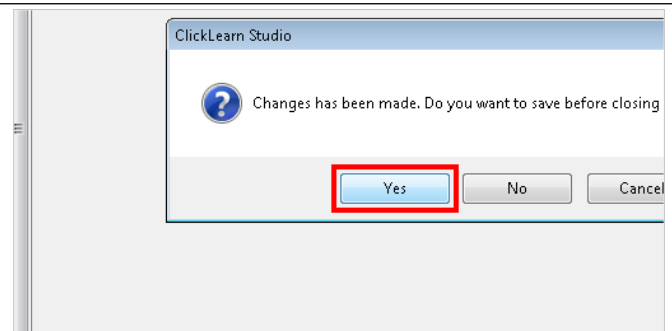
Click on the menu **File**.
You may also press **Alt+F**.



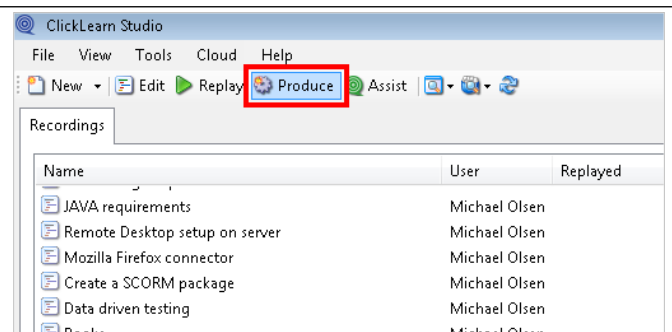
Click on the menu **Close**.



Click on the button **Yes**.
You may also press **Alt+Y**.

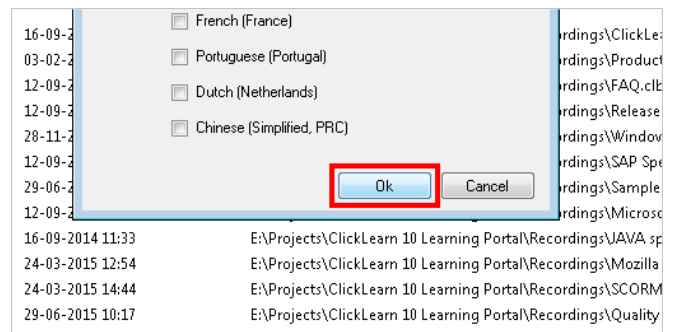


Click on the button **Produce**.
You may also press **Alt+U**.

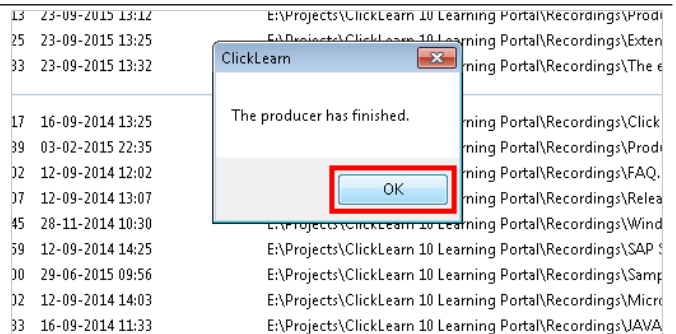


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Click on the button **Ok**.
You may also press **Alt+O**.

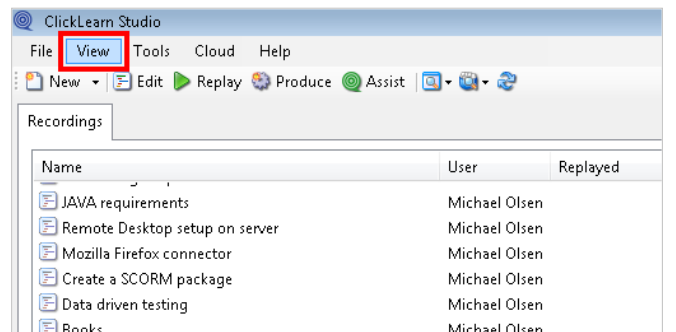


Click on the button **OK**.

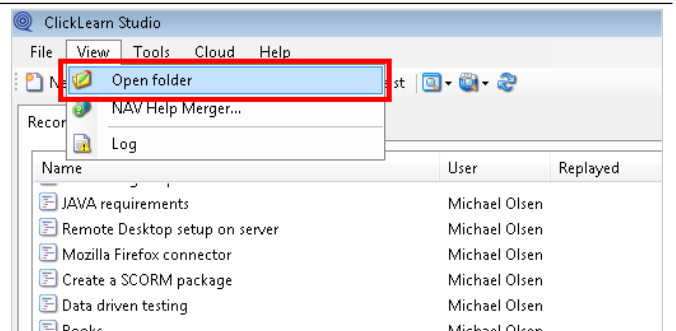


4.6.5. The produced packages according to tags

Click on the menu **View**.
You may also press **Alt+V**.

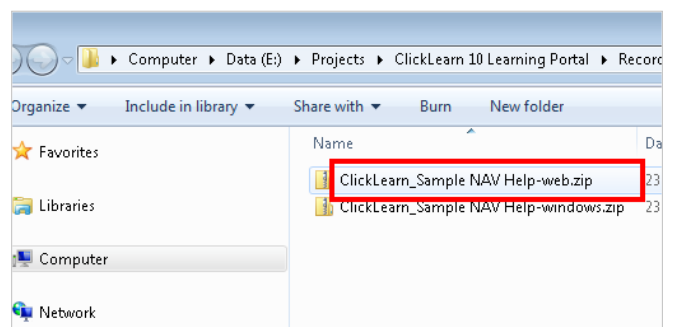


Click on the menu **Open folder**.



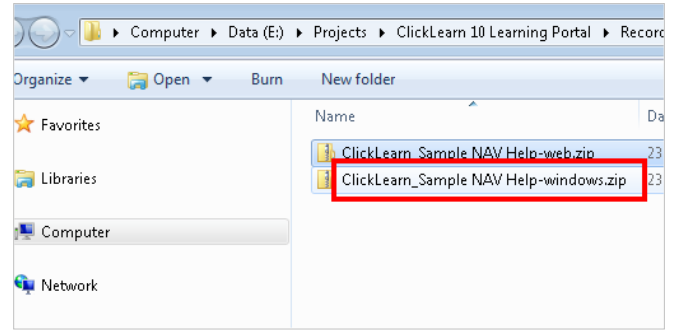
Here are the two packages produced according to the produce tags - windows and web.

Click on the input field **Name**.

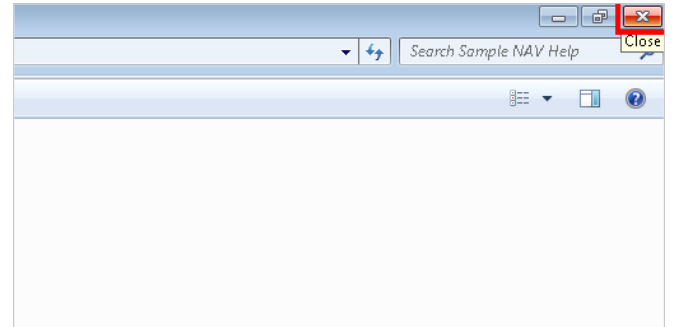


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Click on the input field **Name**.



Click on the button **Close**.



4.7. Advanced NAV Help features

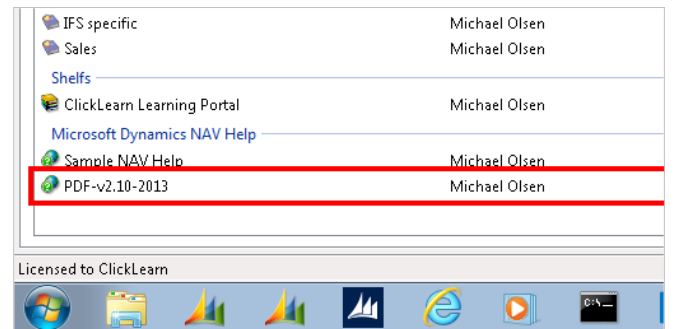
4.7.1. Introduction

The sample here makes use of a help project created by a Microsoft Dynamics NAV ISV partner called DynaTeam.

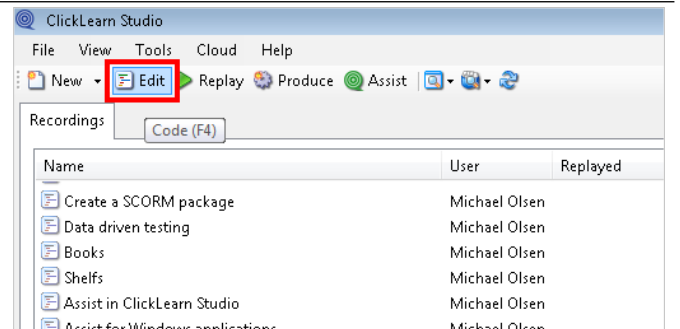
DynaTeam has used ClickLearn to create the online help required to get their ISV solution certified by Microsoft.

4.7.2. The ISV solution help

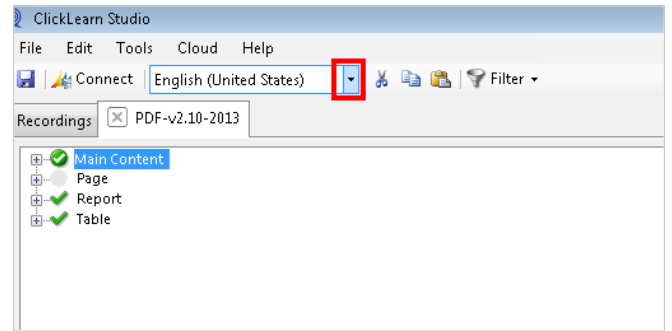
Click on the list element **PDF-v2.10-2013**.



Click on the button **Edit**.
You may also press **Alt+D**.



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

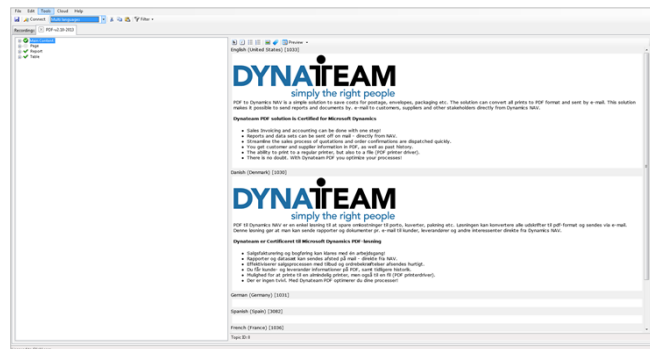
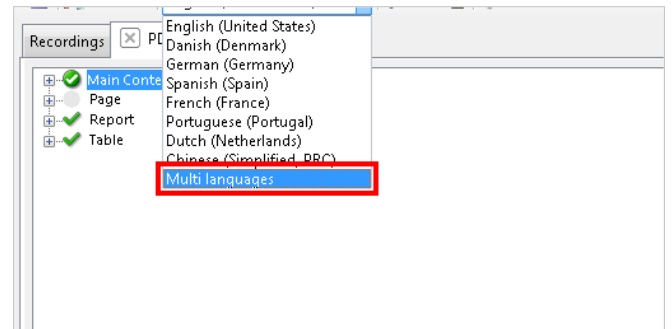


4.7.2.1. Working with multiple languages

By default the editor will work with the content for the primary language available to ClickLearn.

It is however also possible to edit multiple languages at the same time.

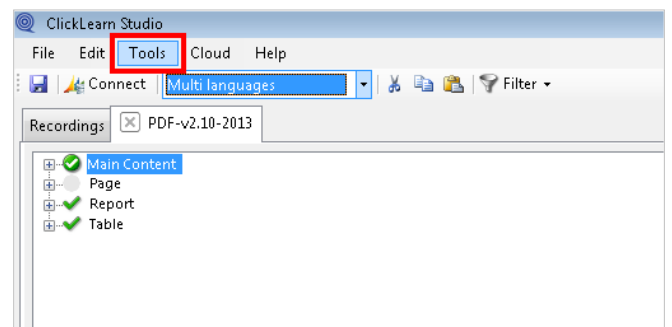
Click on the list element **Multi languages**.



Multi language editing

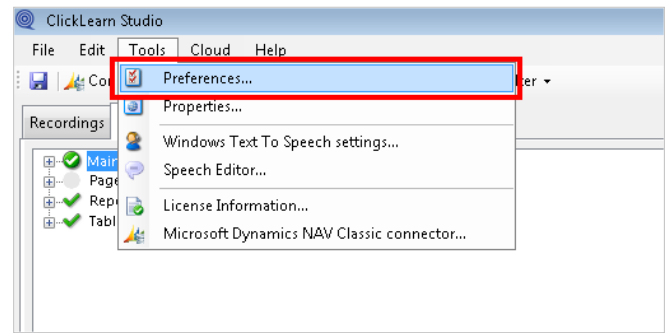
4.7.3. ISV numbering range

Click on the menu **Tools**.

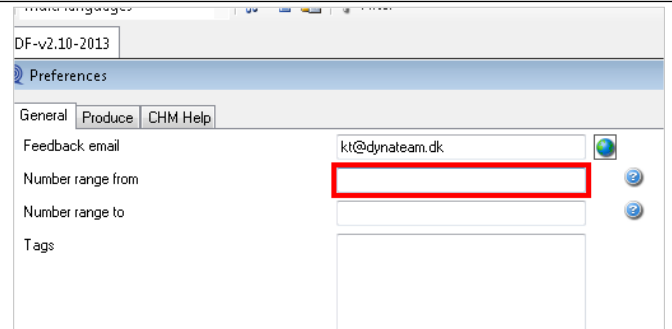


When you are an ISV, you will have a specific number range, which allows ClickLearn to provide a filtering option, so that you only see the objects in your solution.

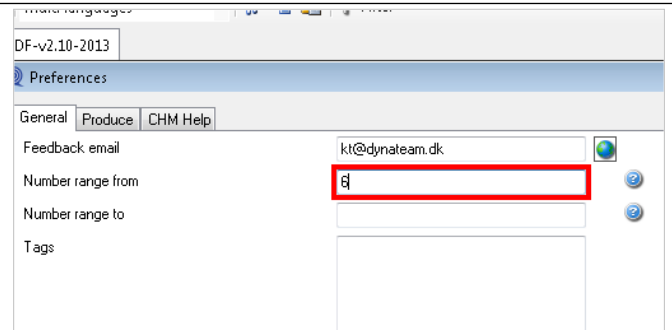
Click on the menu **Preferences...**



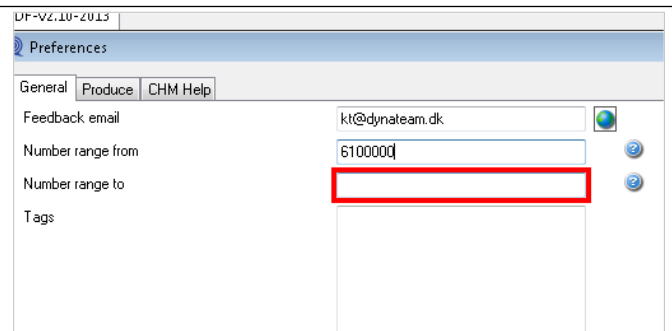
Click on the input field **Number range from.**



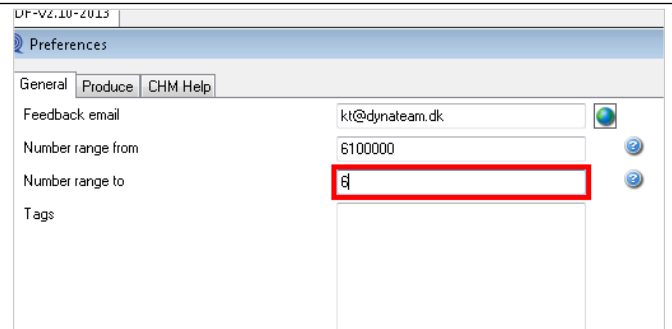
Enter **Number range from.**



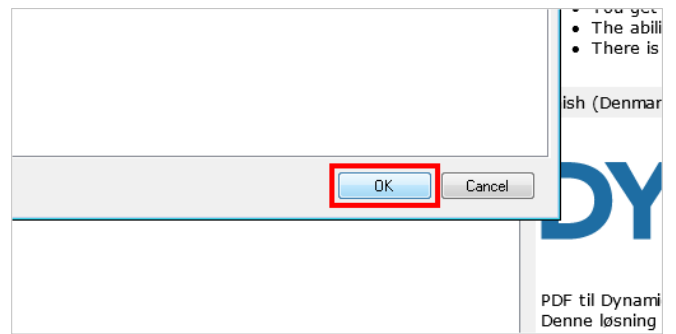
Click on the input field **Number range to.**



Enter **Number range to.**

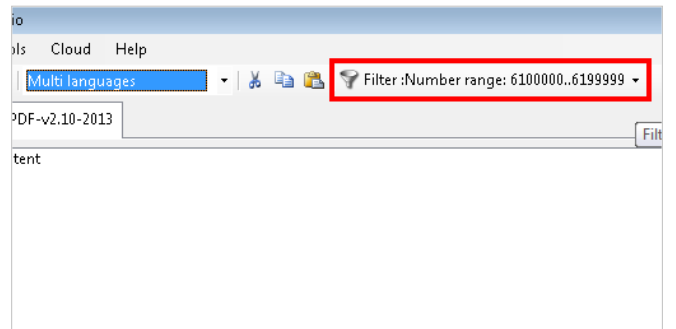


Click on the button **OK**.
You may also press **Alt+O**.

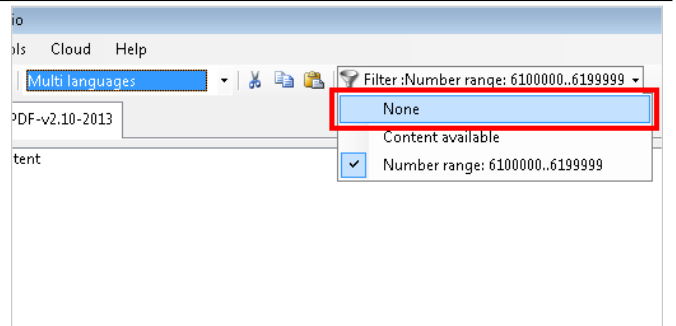


4.7.4. Filtering according to numbering range

Click on the menu **Filter :Number range:**
6100000..6199999.

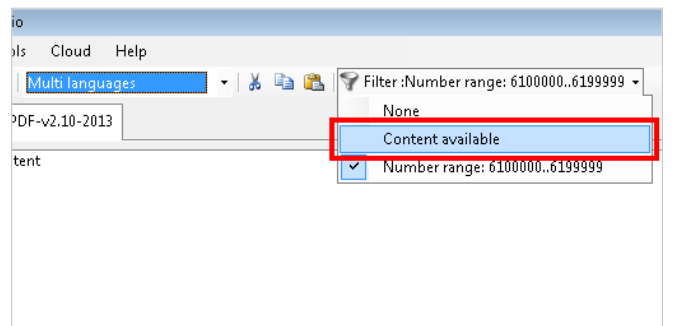


Click on the menu **None**.



With no filter set, you have access to all objects in the model to the left.

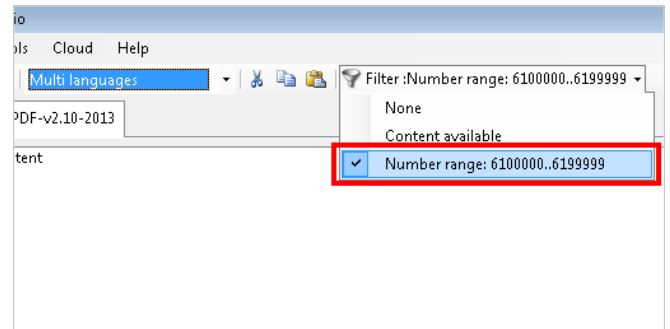
Click on the menu **Content available**.



This filter will limit the nodes to the left, only to include objects where content exists within this project.

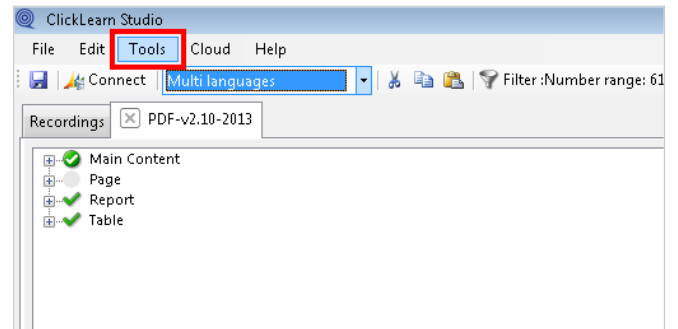
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Click on the menu **Number range: 6100000..6199999**.

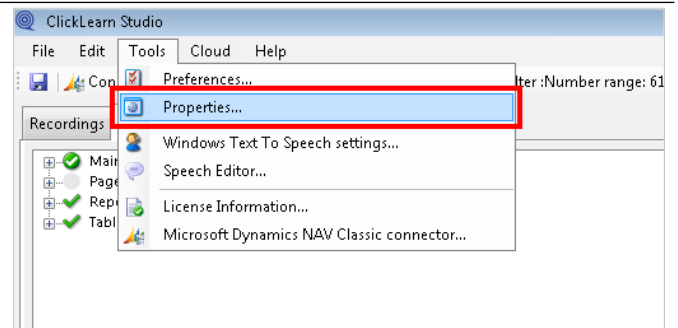


4.7.5. Document properties

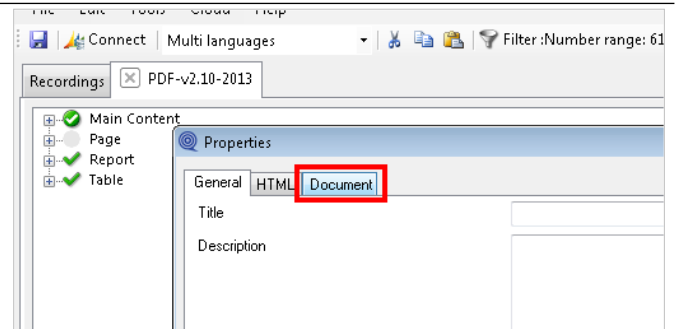
Click on the menu **Tools**.



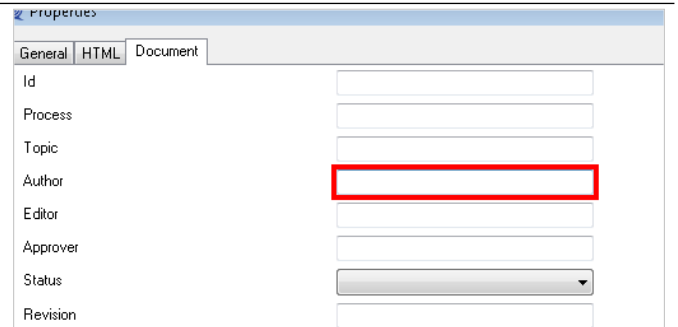
Click on the menu **Properties...**



Click on the tab **Document**.



Click on the input field **Author**.



Enter **Author**.

Properties

General | HTML | Document

Id

Process

Topic

Author

Editor

Approver

Status

Revision

Click on the input field **Editor**.

General | HTML | Document

Id

Process

Topic

Author

Editor

Approver

Status

Revision

Revision date

Enter **Editor**.

General | HTML | Document

Id

Process

Topic

Author

Editor

Approver

Status

Revision

Revision date

Click on the input field **Revision**.

Topic

Author

Editor

Approver

Status

Revision

Revision date

Enter **Revision**.

Topic

Author

Editor

Approver

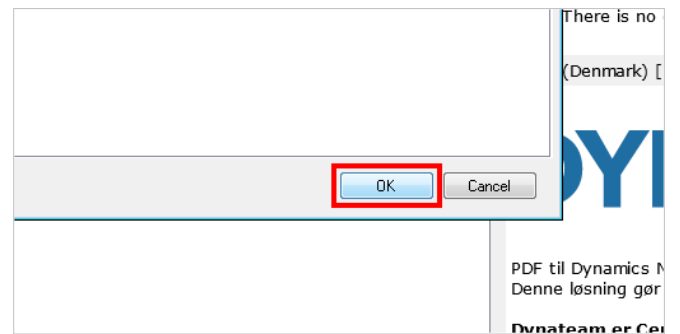
Status

Revision

Revision date

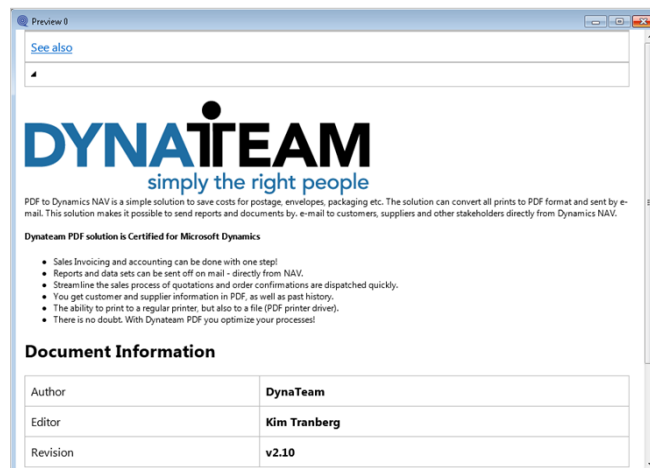
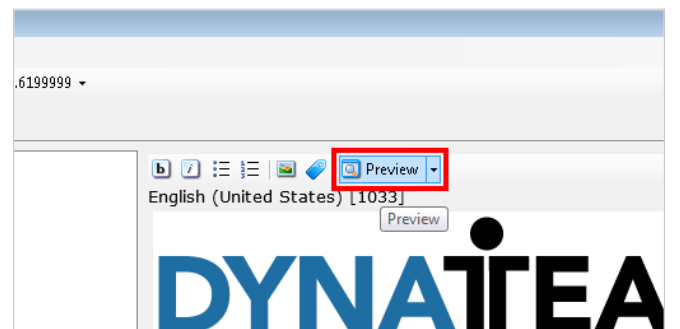
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Click on the button **OK**.
You may also press **Alt+O**.



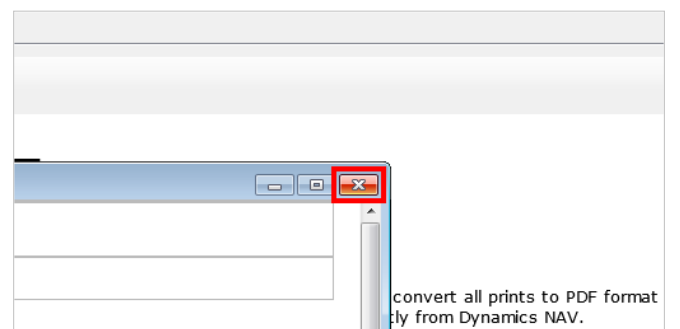
4.7.6. Preview of document properties

Click on the button **Preview**.



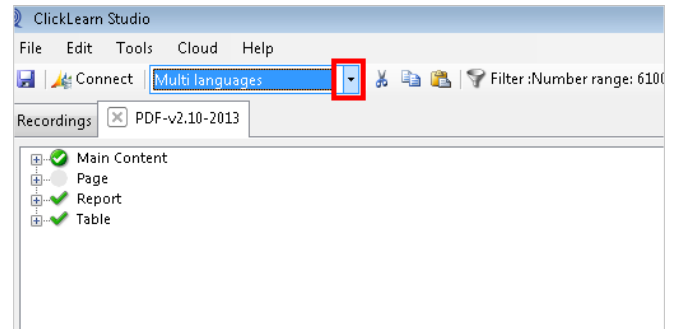
Document properties

Click on the button **Close**.

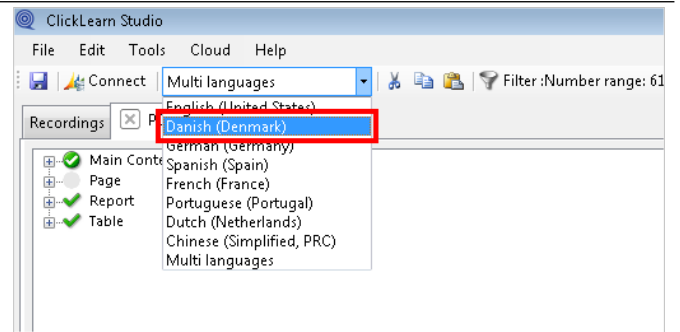


4.7.7. Preview in a specific language

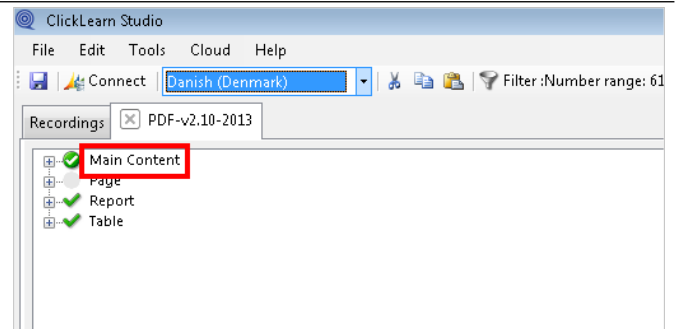
Click on the button **Language**.
You may also press **Alt+Down Arrow**.



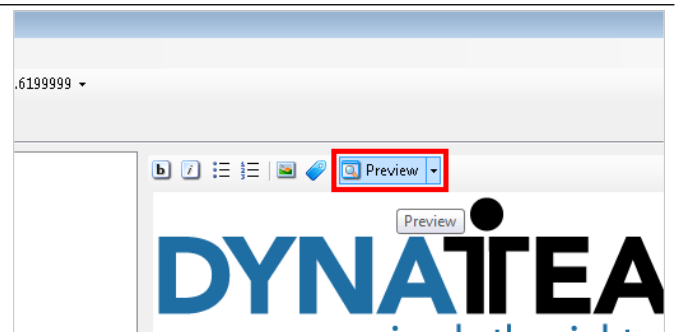
Click on the list element **Danish (Denmark)**.

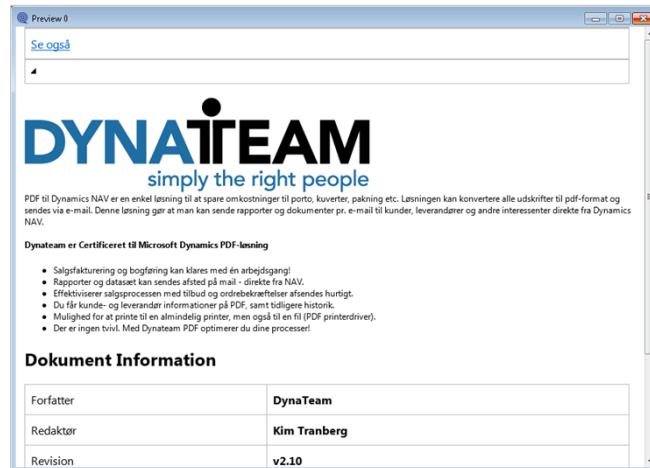


Click on the folder **Main Content**.



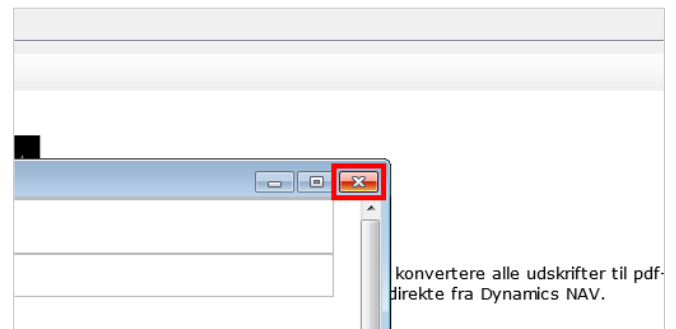
Click on the button **Preview**.





Danish preview

Click on the button **Close**.



4.8. The NAV Help Merger

4.8.1. Introduction

Adding custom help to the Microsoft Dynamics NAV Help server is normally a manual task.

With the NAV Help Merger, you are able to easily maintain the help packages created with ClickLearn.

This allows easy installation of ISV solution packages, and additionally install custom specific packages on top of the ISV packages.

Each package is identified by the ClickLearn license name and a help project name. Typically the license name is the name of your company.

4.8.1.1. Company notes

Older versions of Microsoft Dynamics NAV used a help system with the option for the customer to add company notes.

This option is not available anymore, but with the help packages created with ClickLearn and installed by the NAV Help Merger, it is once again possible.

A customer may buy a license to ClickLearn, and hereby have the ability to customize help on top of any field available in their NAV solution.

4.8.2. Installation

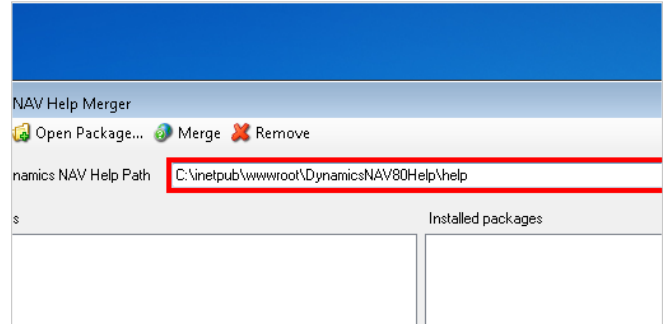
To install ClickLearn NAV Help Merger please open your Internet Explorer and enter the address

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<https://apps.clicklearn.com/NAVHelpMerger/ClickLearnNAVHelpMerger.application>

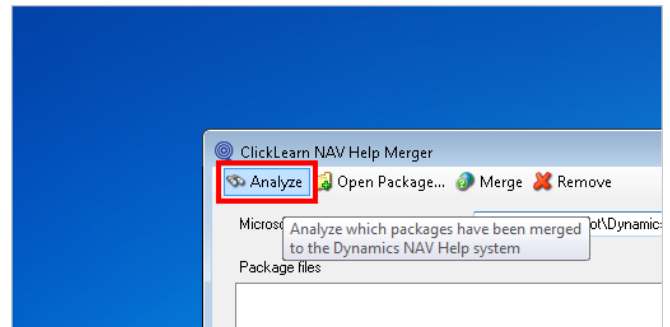
4.8.3. The help path

Click on the input field **Microsoft Dynamics NAV Help Path**.



4.8.4. Analyze which packages is installed

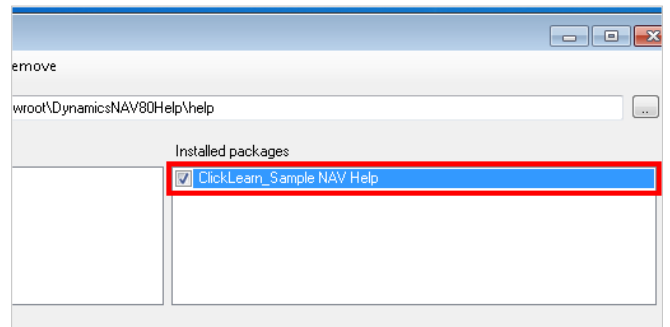
Click on the button **Analyze**.



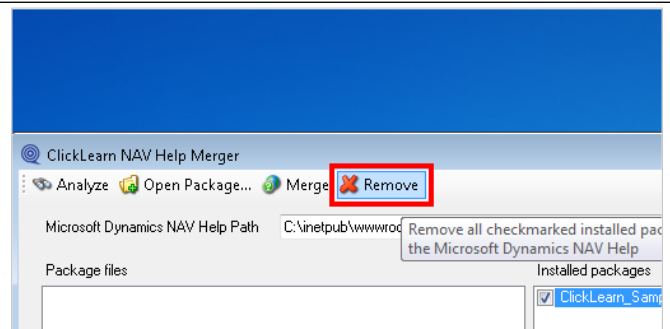
Analyzing may take a long time, as it needs to search all help files. When finished the log will indicate the files containing content. The list of installed packages is updated.

4.8.5. Remove a package

Double click on the checkbox **ClickLearn_Sample NAV Help**.

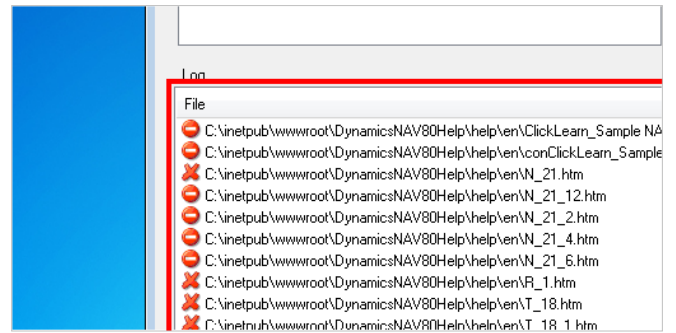


Click on the button **Remove**.



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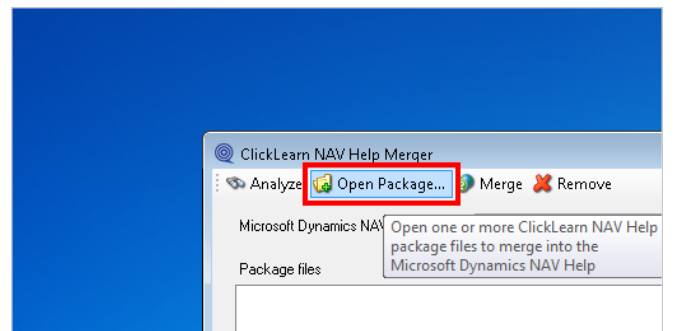
Click on the log



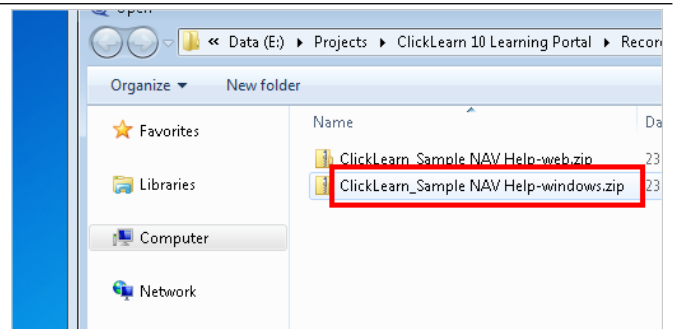
The log will show exactly which files have been removed and which has been modified.

4.8.6. Install a package

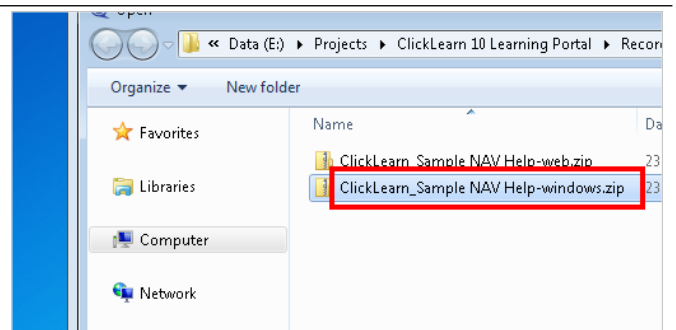
Click on the button **Open Package...**



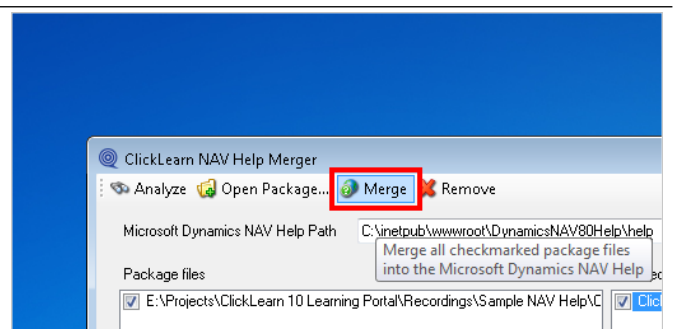
Click on the input field **Name**.



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

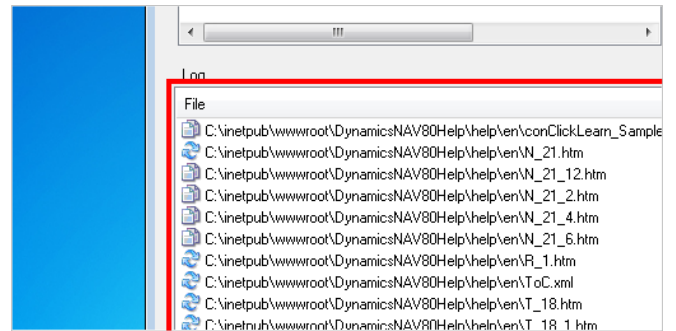


Click on the button **Merge**.



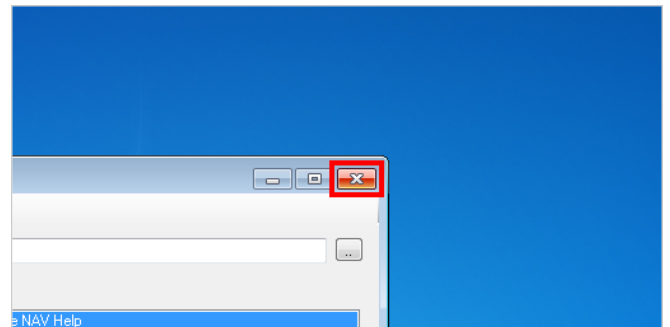
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Click on the log



The log shows all files added, overwritten and modified.

Click on the button **Close**.



5. SCORM and LMS

5.1. Create a SCORM package

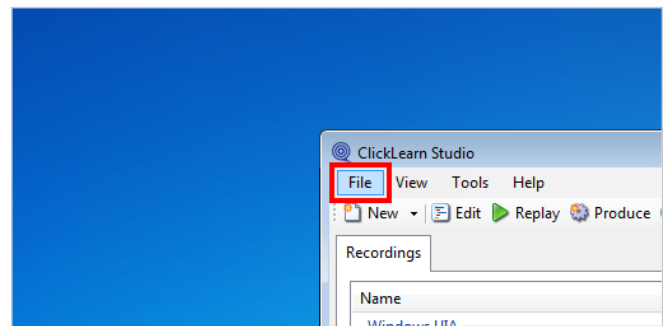
5.1.1. Introduction

ClickLearn enables you to create SCORM 2004 compliant packages easily. The packages may be imported into a Learning Management System of choice.

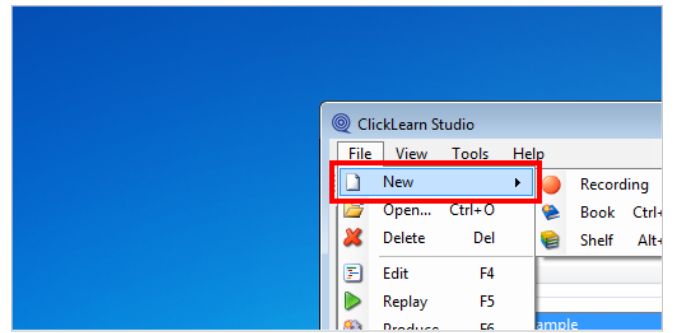
In order to create a SCORM package you may create a book or a shelf. This documentation will show you how to create it using a book.

5.1.2. Create a book

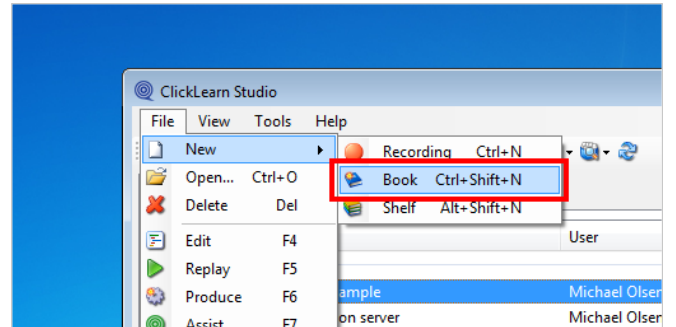
Click on the menu **File**.
You may also press **Alt+F**.



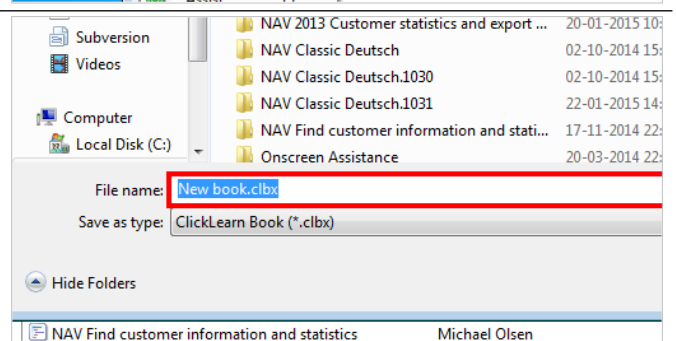
Click on the menu **New**.



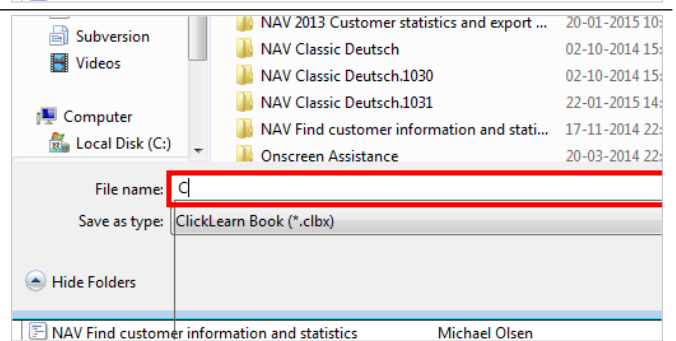
Click on the menu **Book**.



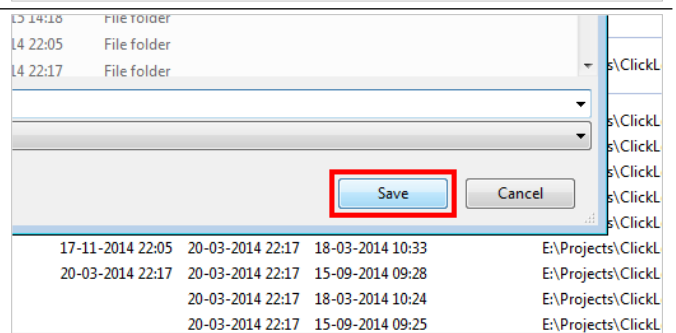
Move the mouse to the input field **File name:**.
You may also press **ALT+N**.



Enter **File name:**.



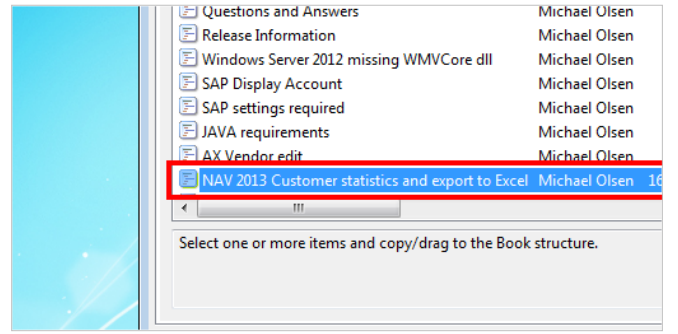
Click on the button **Save**.
You may also press **Alt+S**.



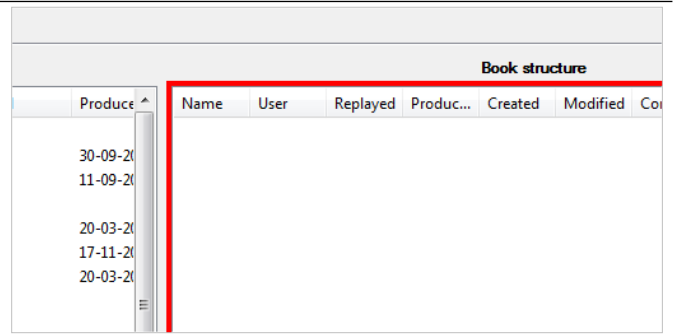
5.1.2.1. Add recordings

The book structure may be important according to how you setup the SCORM package. In this example we choose to create a SCORM package where the user must finish each process in the selected sequence.

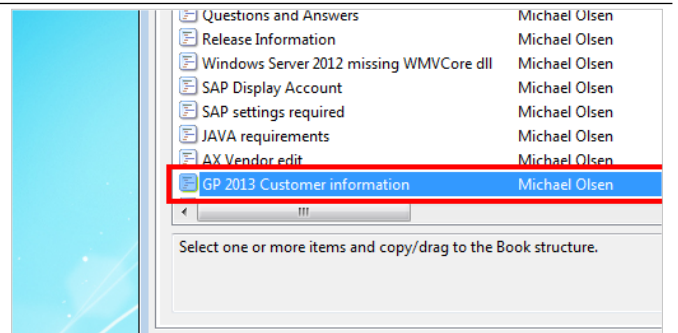
Click and hold the left mouse button on the list element **NAV 2013 Customer statistics and export to Excel.**



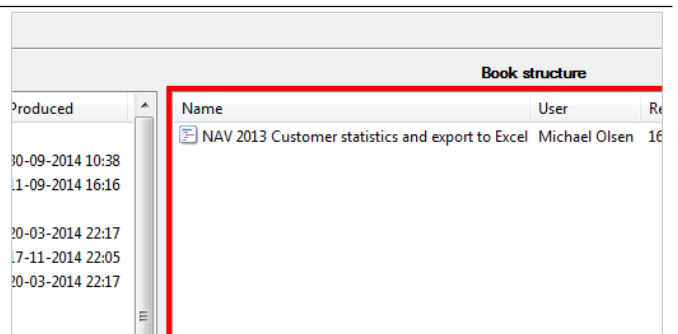
Release the mouse button over the book structure list.



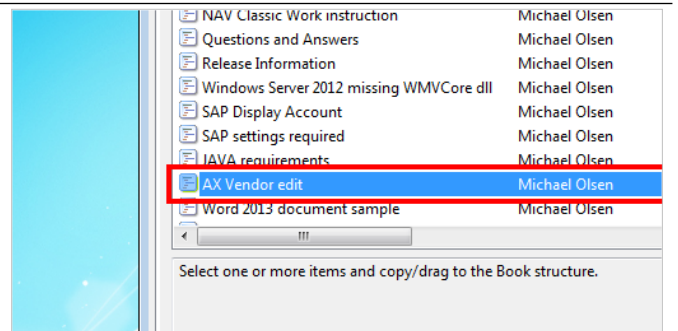
Click and hold the left mouse button on the list element **GP 2013 Customer information.**



Release the mouse button over the book structure list.



Click and hold the left mouse button on the list element **AX Vendor edit.**



Release the mouse button over the book structure list.

Book structure		
Name	User	Re
NAV 2013 Customer statistics and export to Excel	Michael Olsen	16
GP 2013 Customer information	Michael Olsen	

Click and hold the left mouse button on the list element **NAV Find customer information and statistics.**

Name	User	Repl
ClickLearn User Interface	Michael Olsen	
Edit work instruction	Michael Olsen	
Introduction	Michael Olsen	
License	Michael Olsen	
Microsoft Dynamics NAV Classic	Michael Olsen	
NAV Find customer information and statistics	Michael Olsen	
Onscreen Assistance	Michael Olsen	
Part recording	Michael Olsen	
Produce the work instruction	Michael Olsen	
Record work instruction	Michael Olsen	
SAP Logon requirements	Michael Olsen	
Technical support	Michael Olsen	

Release the mouse button over the book structure list.

Book structure		
Name	User	Re
NAV 2013 Customer statistics and export to Excel	Michael Olsen	16
GP 2013 Customer information	Michael Olsen	
AX Vendor edit	Michael Olsen	

Click and hold the left mouse button on the list element **IFS Create new customer.**

Name	User	Re
Release Information	Michael Olsen	
Windows Server 2012 missing WMVCore.dll	Michael Olsen	
SAP Display Account	Michael Olsen	
SAP settings required	Michael Olsen	
JAVA requirements	Michael Olsen	
Word 2013 document sample	Michael Olsen	
NAV Classic Deutsch	Michael Olsen	
IFS Create new customer	Michael Olsen	

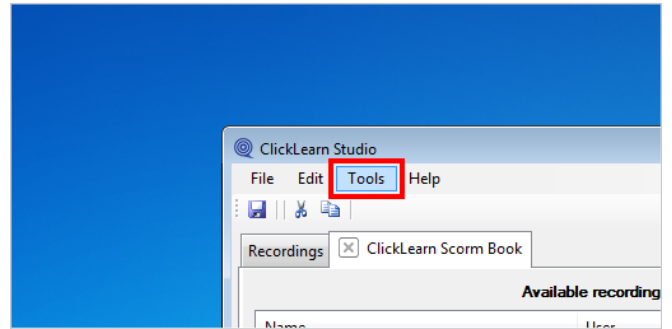
Select one or more items and copy/drag to the Book structure.

Release the mouse button over the book structure list.

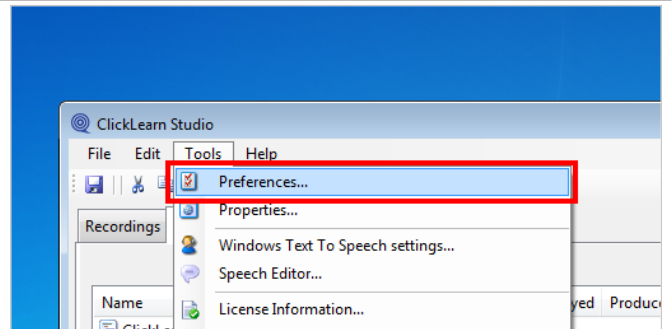
Book structure		
Name	User	Re
NAV 2013 Customer statistics and export to Excel	Michael Olsen	16
GP 2013 Customer information	Michael Olsen	
AX Vendor edit	Michael Olsen	
NAV Find customer information and statistics	Michael Olsen	

5.1.2.2. Setup the SCORM package

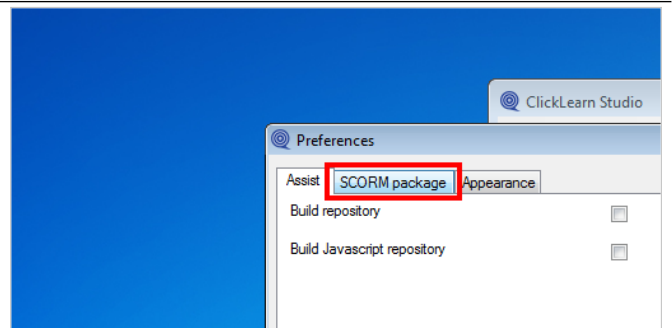
Click on the menu **Tools**.



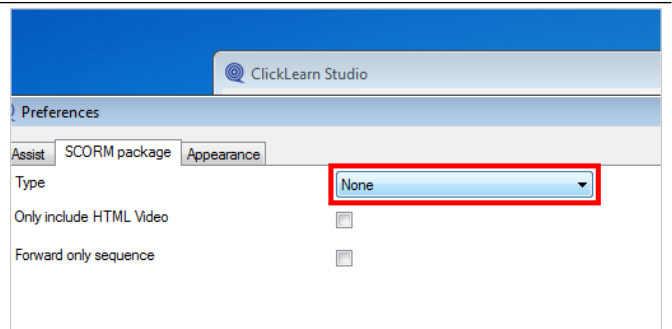
Click on the menu **Preferences...**



Click on the tab **SCORM package**.



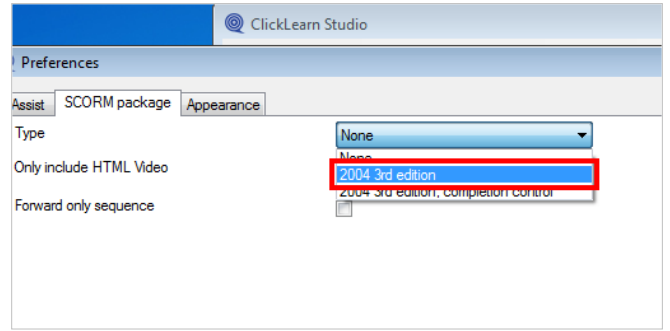
Click on the combo box **Type**.



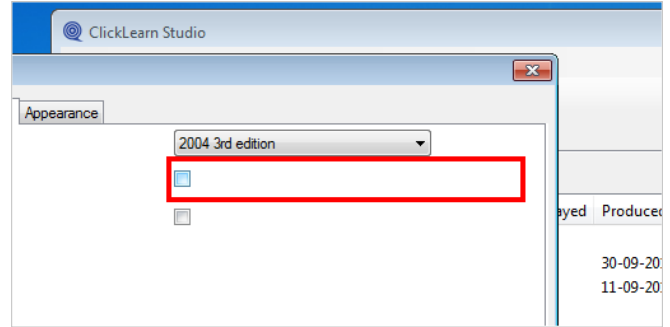
You may choose between two types of SCORM packages. With or without completion control.

Without completion control, the user is not rated at the end. Instead, the LMS system will mark the step in the course as completed.

Click on the list element **2004 3rd edition**.

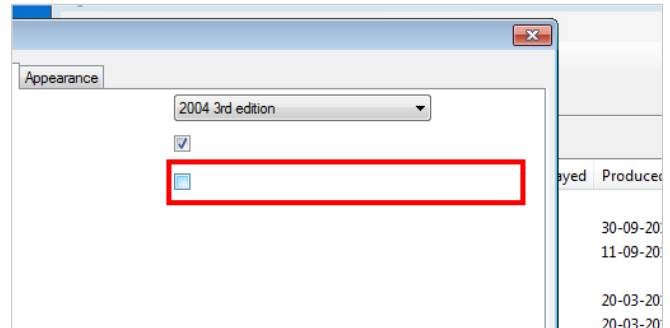


Click on the checkbox **Only include HTML Video**.

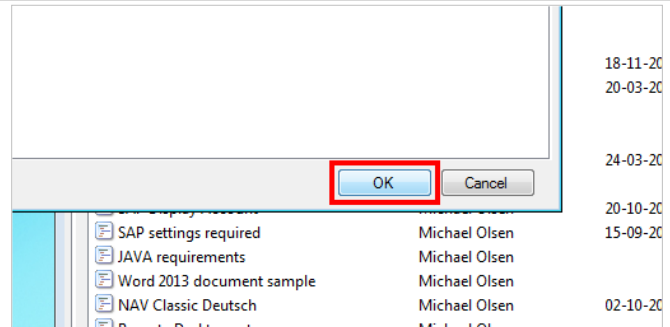


Please note, that if not checked, ClickLearn will pack all produced content into the package. This may include documents such as the Word document, PowerPoint slides and PDF document.

Click on the checkbox **Forward only sequence**.

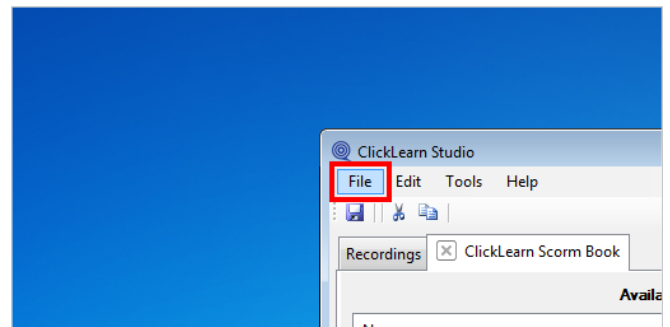


Click on the button **OK**.
You may also press **Alt+O**.



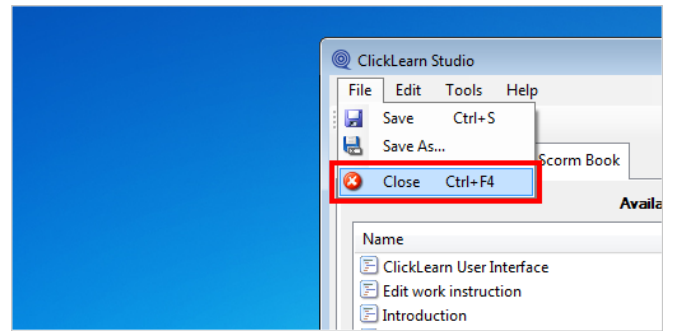
5.1.2.3. Save the book

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

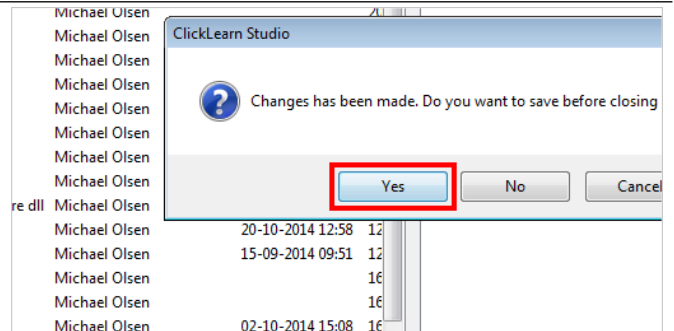


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Click on the menu **Close**.

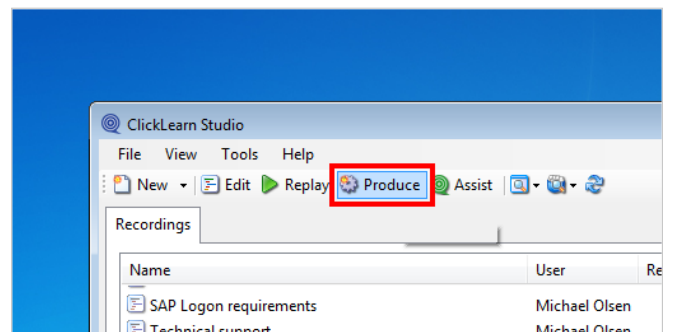


Click on the button **Yes**.
You may also press **Alt+Y**.

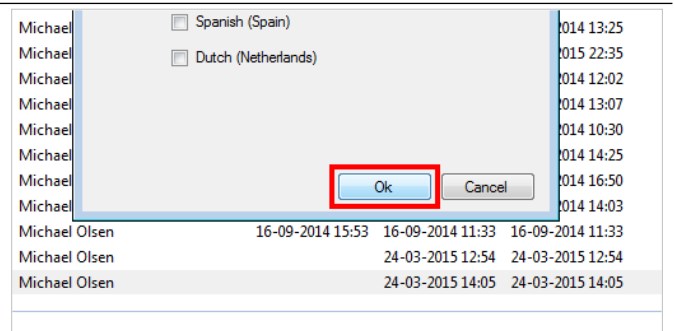


5.1.3. Produce the book

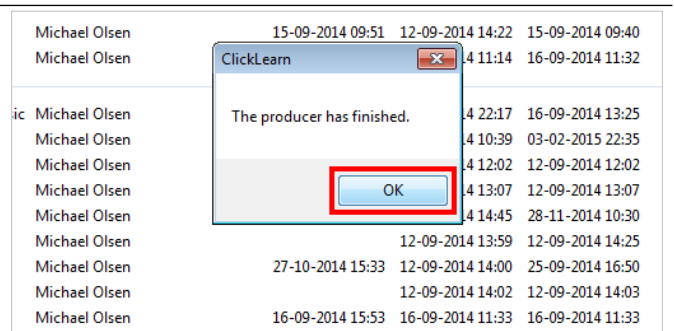
Click on the button **Produce**.
You may also press **Alt+U**.



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



Click on the button **OK**.



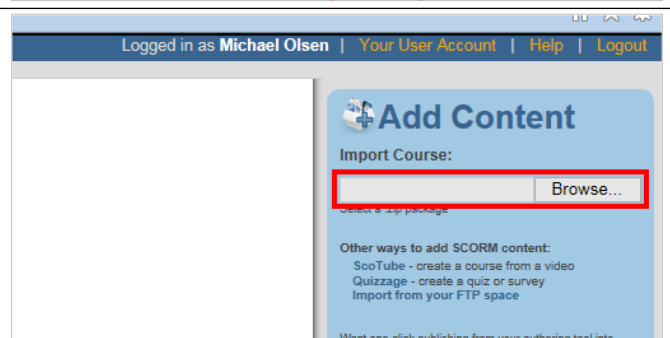
When the book has been produced, the book folder will contain a compressed SCORM package file, ready to upload into the LMS system.

5.1.4. Import the SCORM package in the LMS system

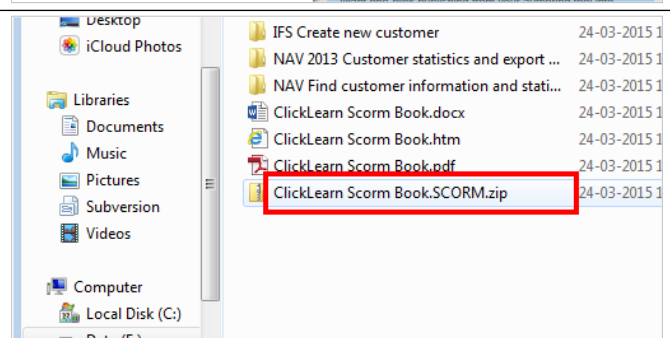
Open your LMS system.



Click on browse to upload the package.

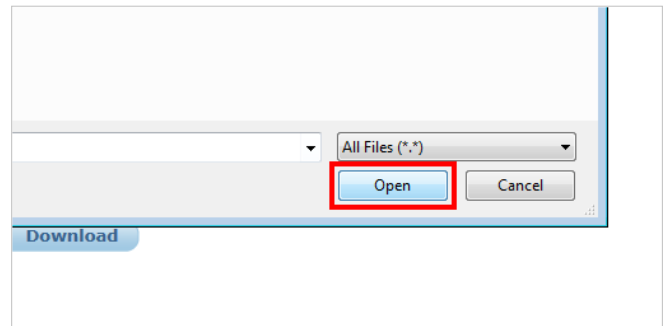


Select the package ClickLearn has produced.



The name of the file, is the name of the book, extended with .SCORM.zip.

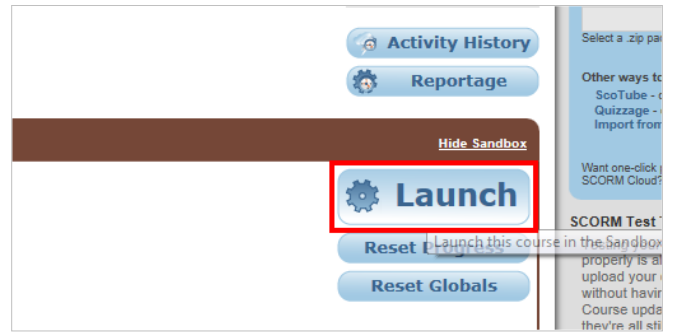
Click on the button **Open**.
You may also press **Alt+O**.



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5.1.5. Start the course

Click on Launch



Click on NAV 2013 Customer statistics and export to Excel



6. SharePoint

6.1. Shelf to SharePoint

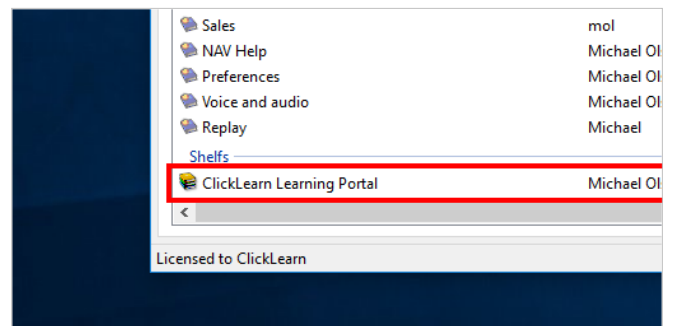
To produce the shelf content so it is ready to be published to a SharePoint site ClickLearn must produce ASPX files rather than HTML files.

This must be setup in the preferences of the Shelf.

In this example we will setup and produce the shelf named ClickLearn Learning Portal.

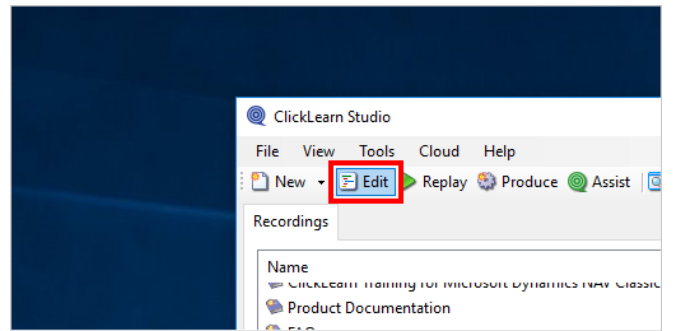
6.1.1. Preferences

Click on the list element **ClickLearn Learning Portal**.

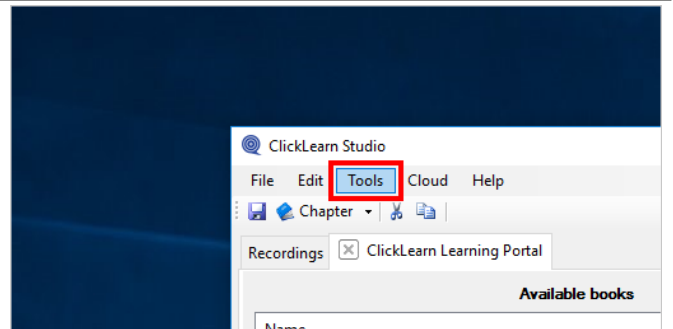


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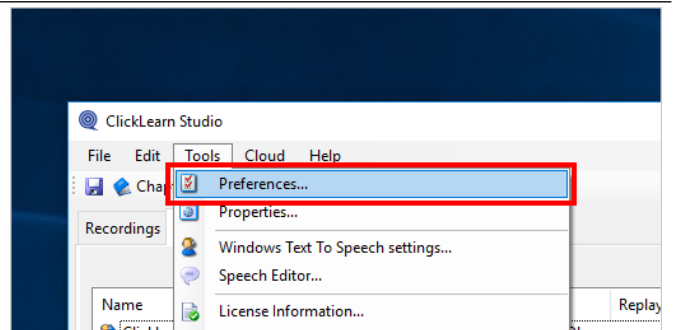
Click on the button **Edit**.
You may also press **Alt+D**.



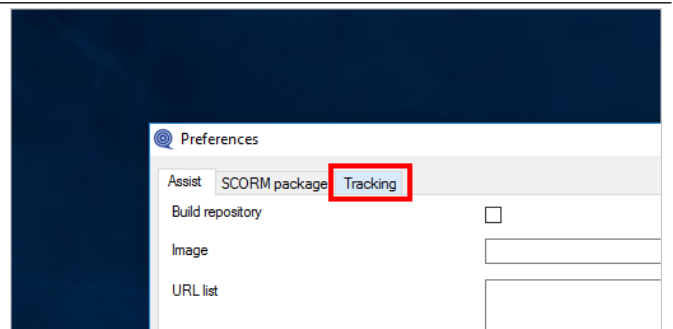
Click on the menu **Tools**.



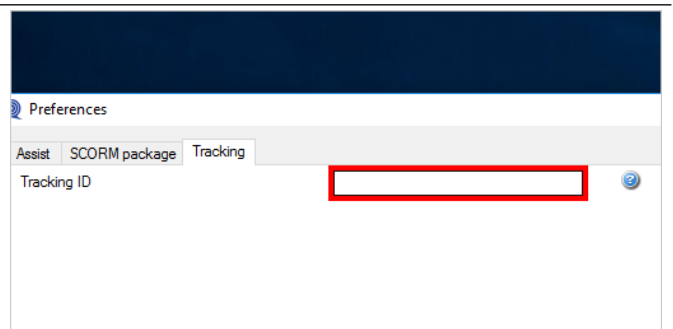
Click on the menu **Preferences...**



Click on the tab **Tracking**.



Click on the input field **Tracking ID**.



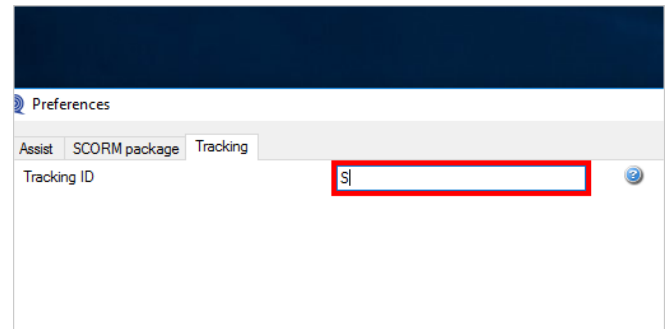
The Tracking ID must begin with SP- in upper case which tells ClickLearn to produce the ASPX files instead of the HTML files.

If a name is added after the SP- the produced content will be prepared to track users interaction with the content on the SharePoint site and add it to a SharePoint list named accordingly.

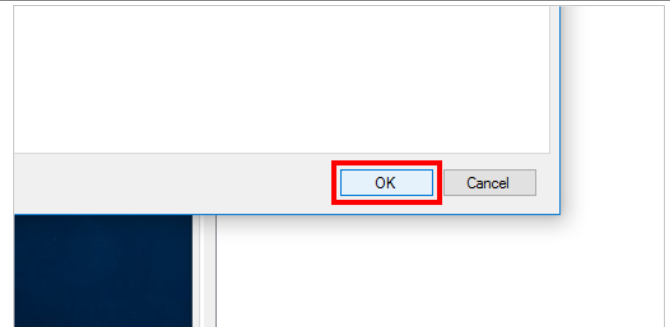
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In this example we want tracking to be added to a list named CLTracking.

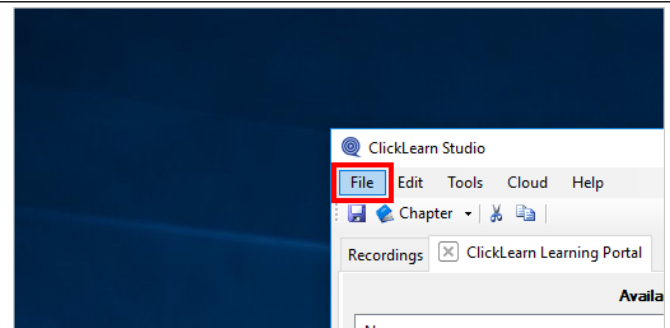
Enter **Tracking ID**.



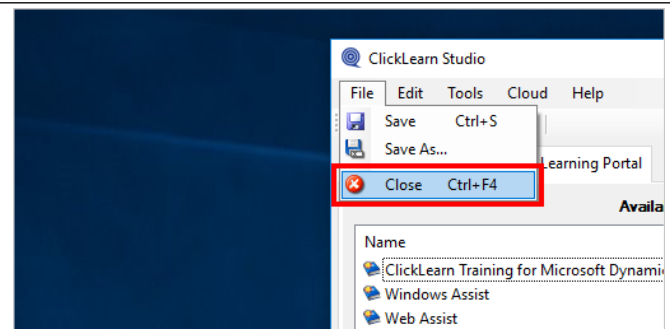
Click on the button **OK**.
You may also press **Alt+O**.



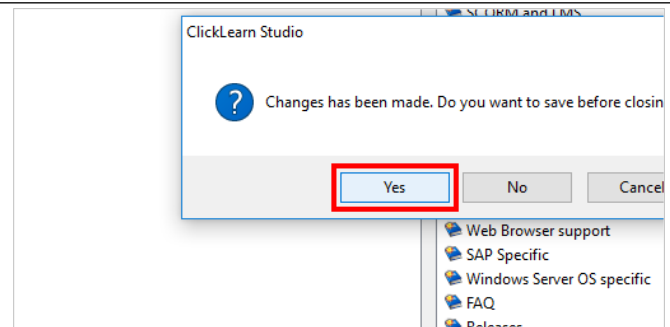
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

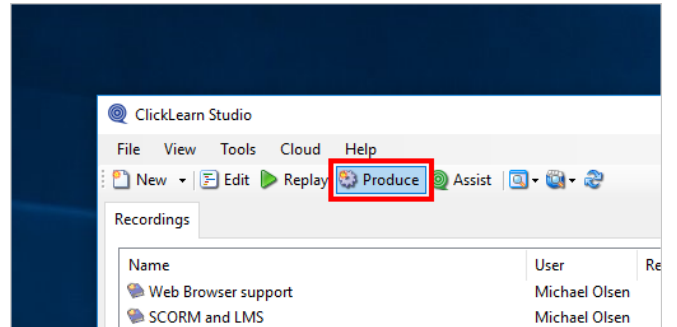


Click on the button **Yes**.
You may also press **Alt+Y**.

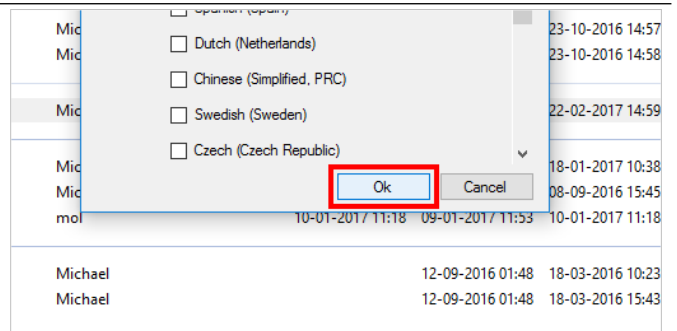


6.1.2. Produce

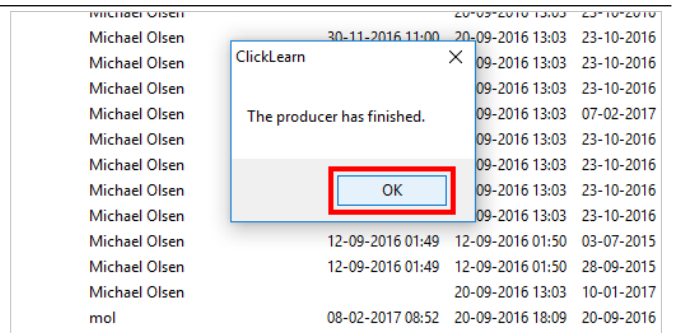
Click on the button **Produce**.
You may also press **Alt+U**.



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

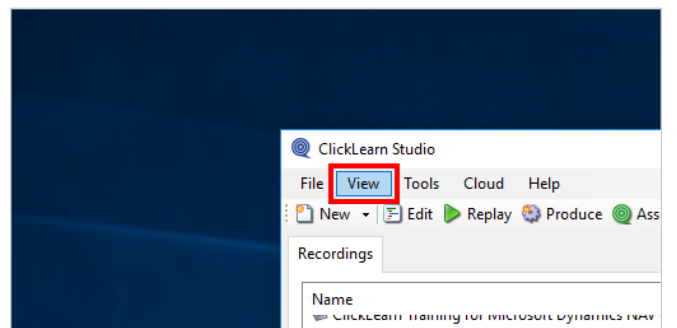


Click on the button **OK**.

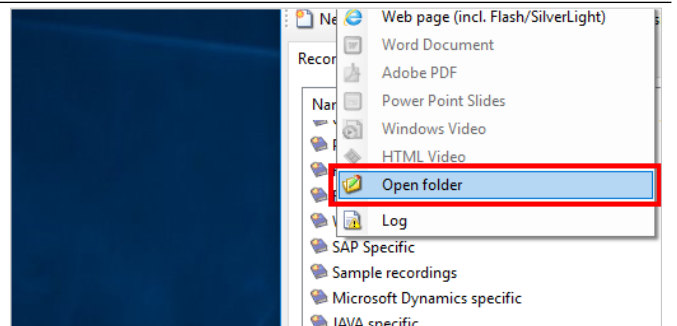


6.1.3. Copy all produced files

Click on the menu **View**.
You may also press **Alt+V**.

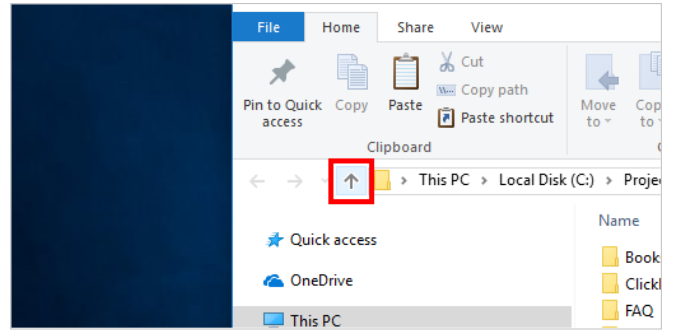


Click on the menu **Open folder**.

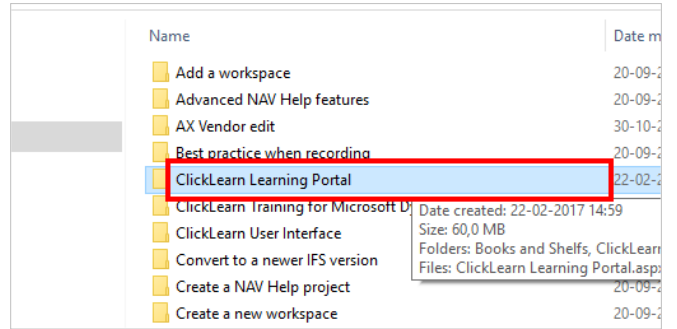


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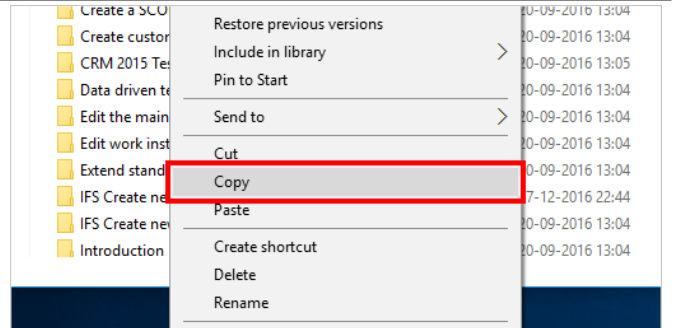
Click on the button **Up** to "Recordings" (Alt + Up Arrow).



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



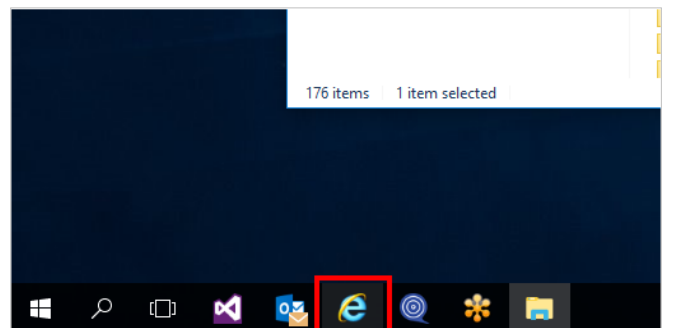
Click on the menu **Copy**.



6.1.4. Copy to SharePoint

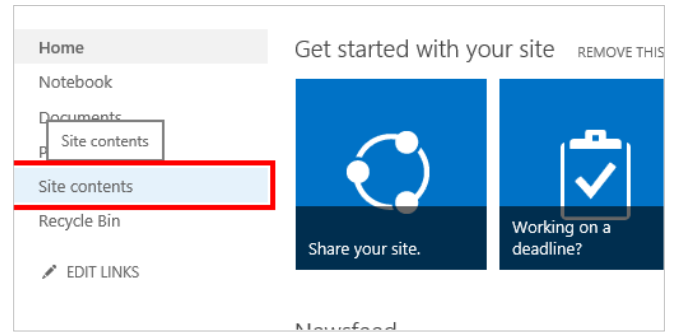
If you are running a SharePoint online please make sure to setup allow users to run custom scripts on both personal and self-serviced sites. This must be setup in the site administration and prior to uploading the content. If you make the change it may take up to 24 hours before you can make the upload.

Click on the button **Internet Explorer - 1 running window**.

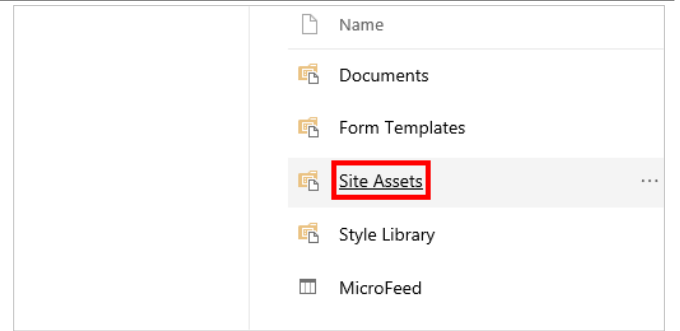


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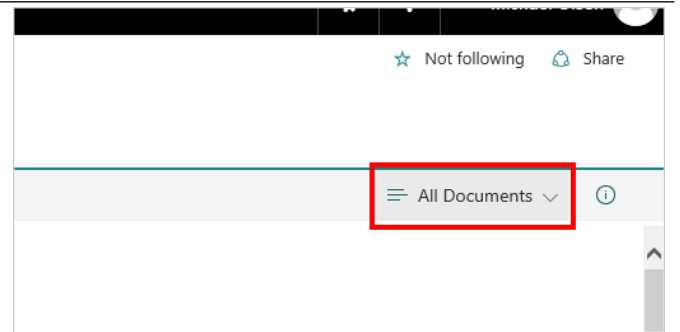
Click on the link **Site contents**



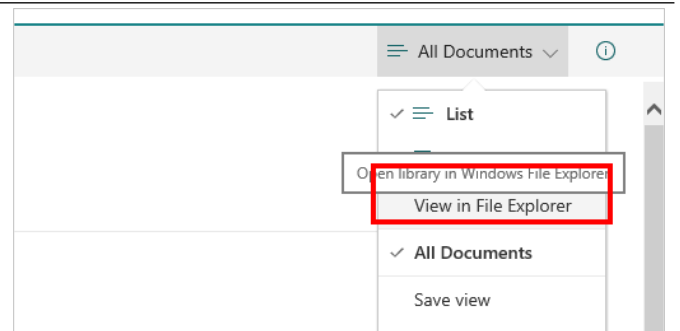
Click on the link **Site Assets**



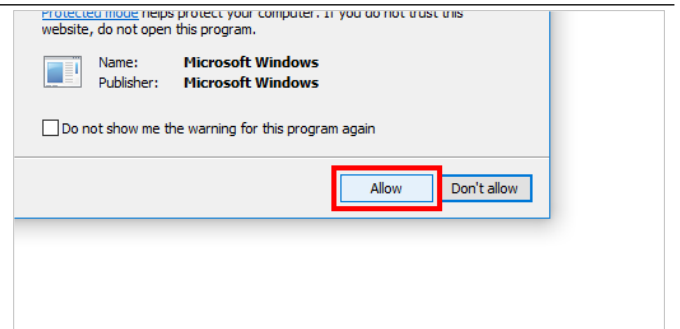
Click on **All Documents**



Click on the link **Open library in Windows File Explorer**

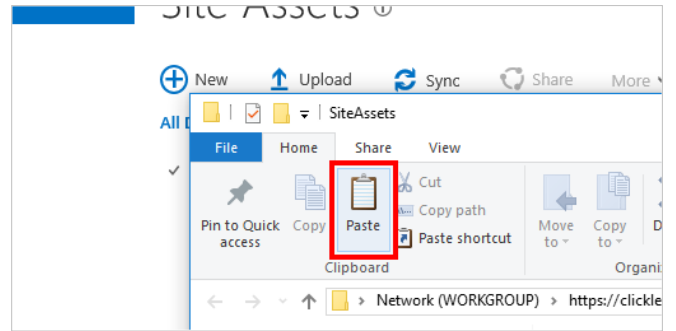


Click on the button **Allow**.
You may also press **Alt+A**.



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Click on the button **Paste**.

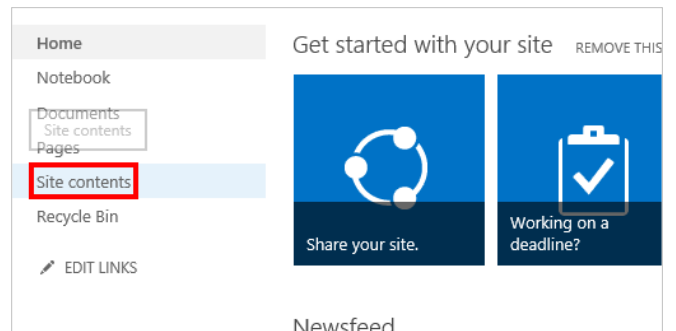


All files have now been copied to the SharePoint site in the library SiteAssets.

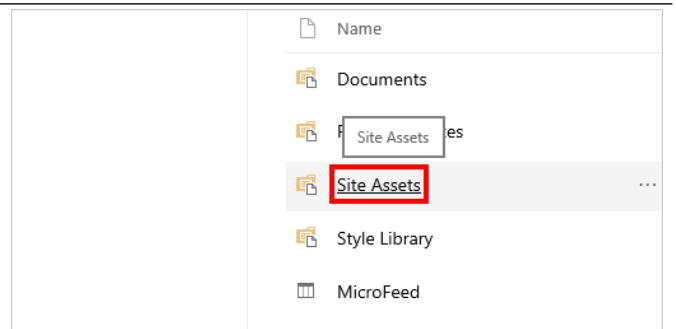
6.2. Direct access to the uploaded SharePoint content

Once the content is uploaded to SharePoint it can be accessed directly from the library.

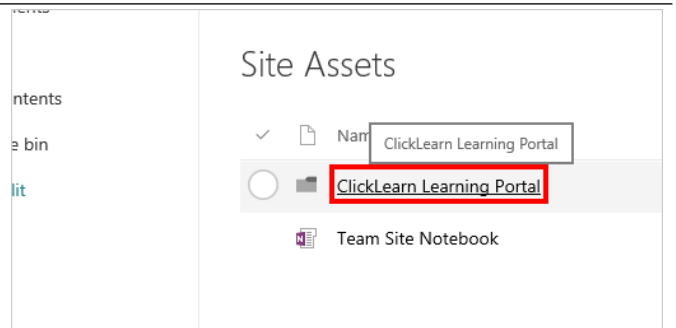
Click on **Site contents**



Click on the link **Site Assets**

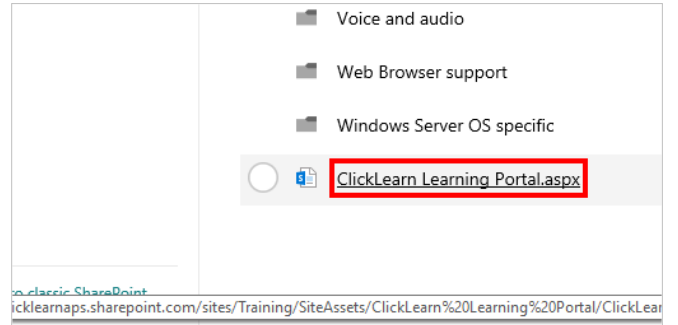


Click on the link **ClickLearn Learning Portal**

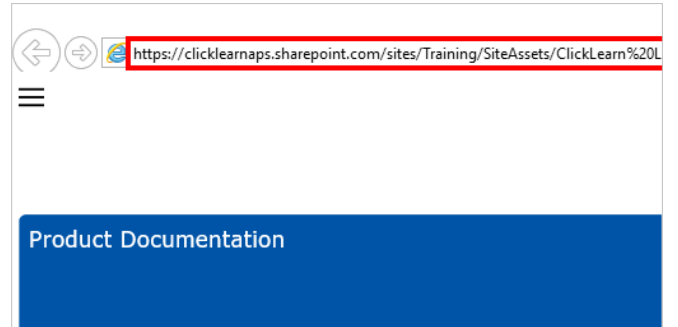


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Click on the link **ClickLearn Learning Portal.aspx**



Click on the **Address and search using Bing**. The link may now be send to users or used to create shortcuts from within your applications.



Please note that direct access to the content will prevent tracking from working.

For tracking to work the content must be hosted in a SharePoint Web Part page.

6.3. Upload Sharepoint tracking list

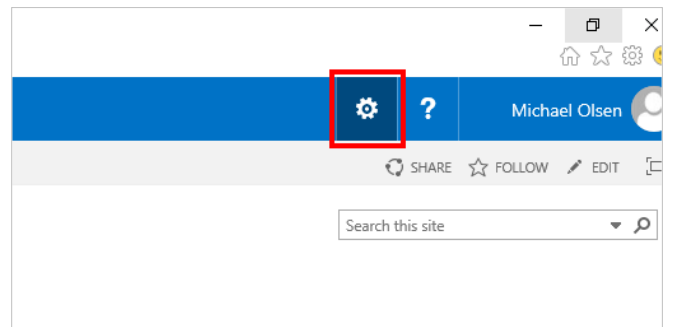
For tracking of the produced ClickLearn content to work on SharePoint a list is required with some specific columns.

ClickLearn has prepared a list template you may download. The name of the file to download must also contain the language id and name of the language you have in your SharePoint.

First download the list template <https://apps.clicklearn.com/CLTracking-SharePoint-ListTemplate.zip> and unpack it.

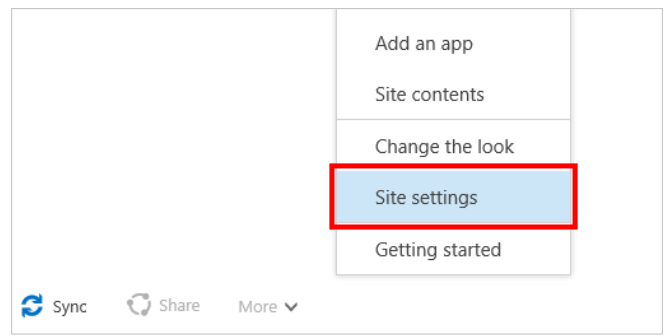
6.3.1. Upload list template

Click on the button **Open the Settings menu to access personal and app settings**

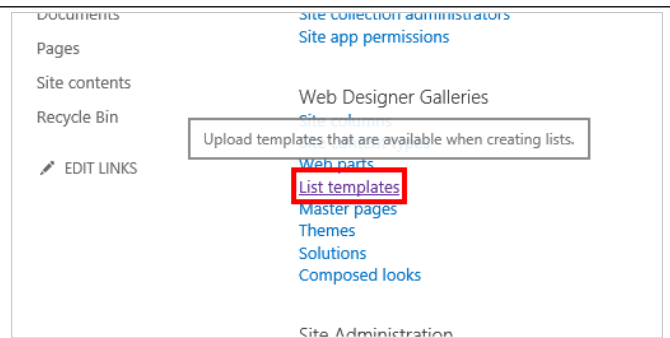


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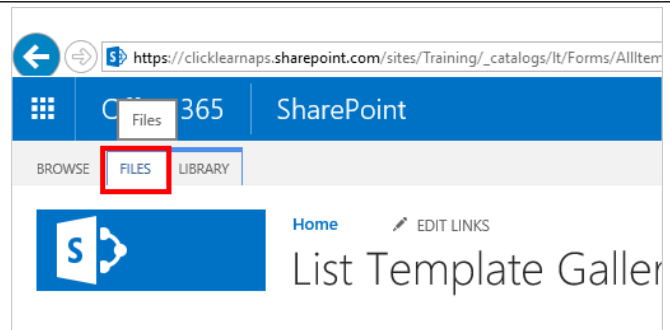
Click on the link **Site settings**



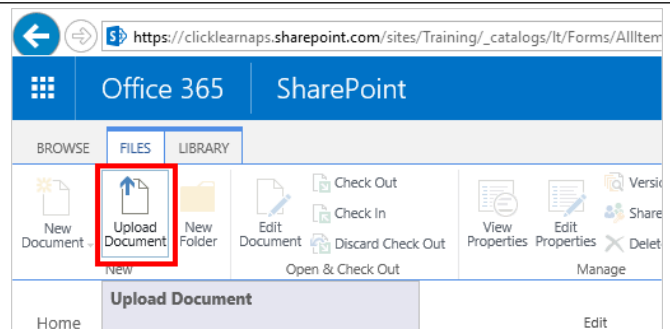
Click on the link **Upload templates that are available when creating lists.**



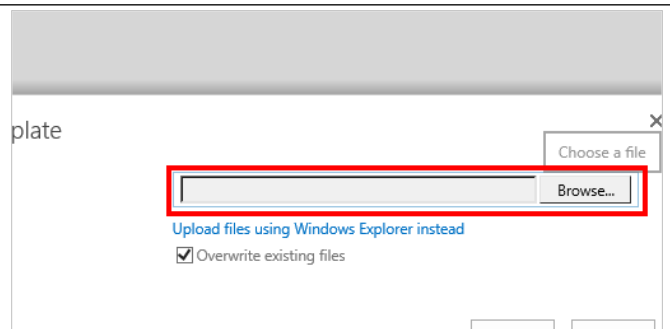
Click on the ribbon tab **Files**



Click on the ribbon item **Upload Document**

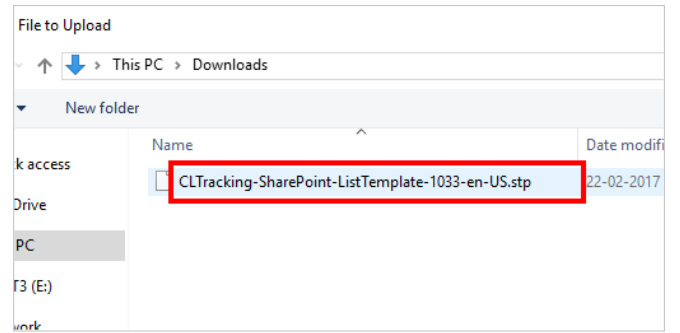


Click on the file field **Choose a file**

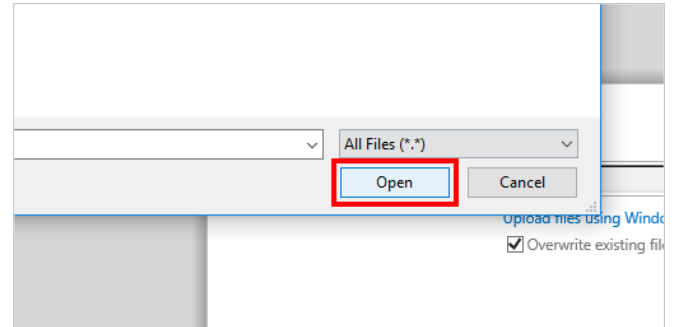


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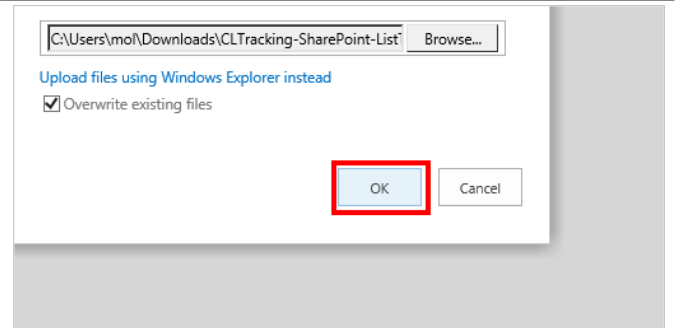
If the SharePoint site language is set to English (United States) you need to open the file where 1033 is the language id and en-US is the language name.



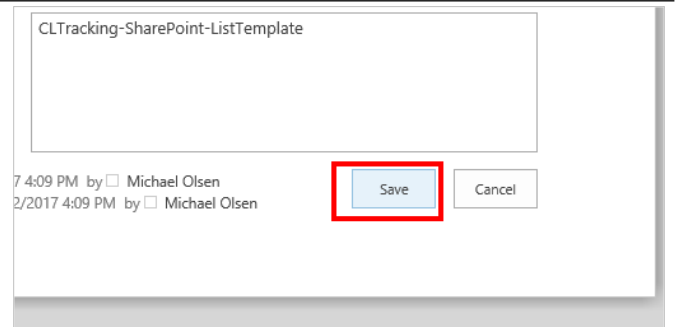
Click on the button **Open**.
You may also press **Alt+O**.



Click on the button **OK**

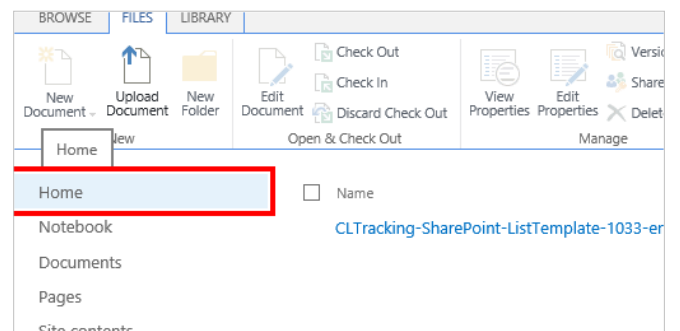


Click on the button **Save**



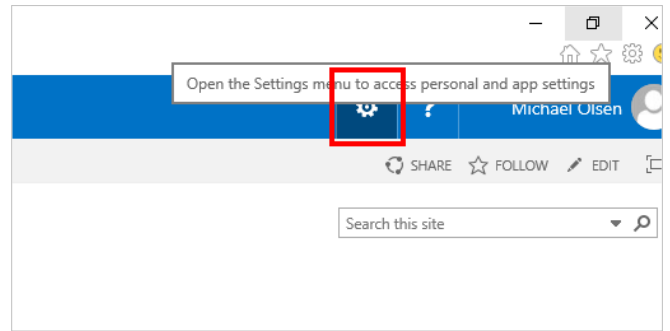
6.3.2. Create a list based on the template

Click on the link **Home**

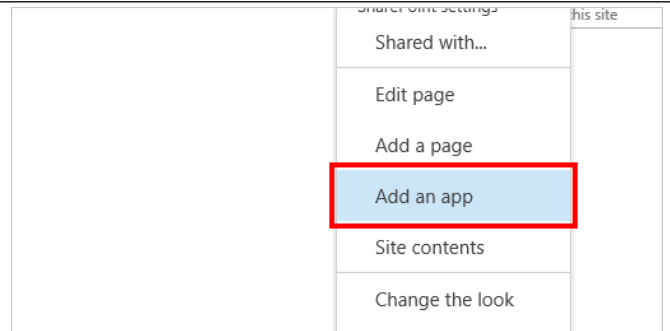


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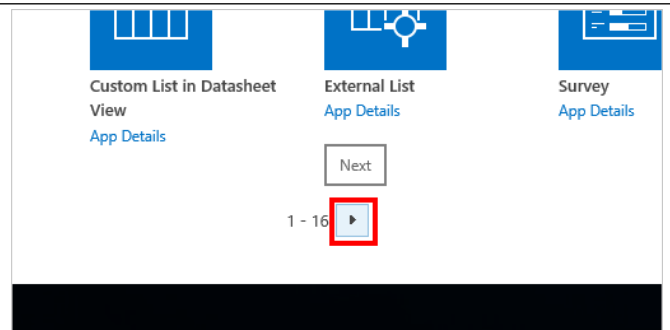
Click on the button **Open the Settings menu to access personal and app settings**



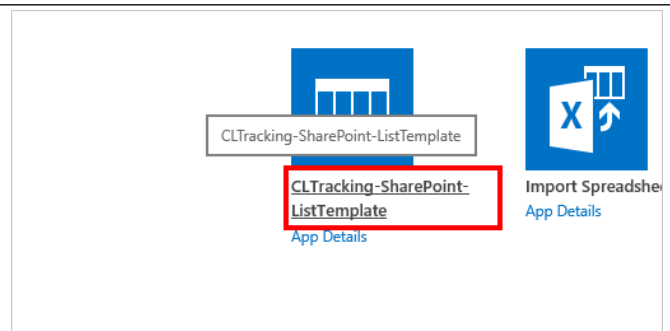
Click on the link **Add an app**



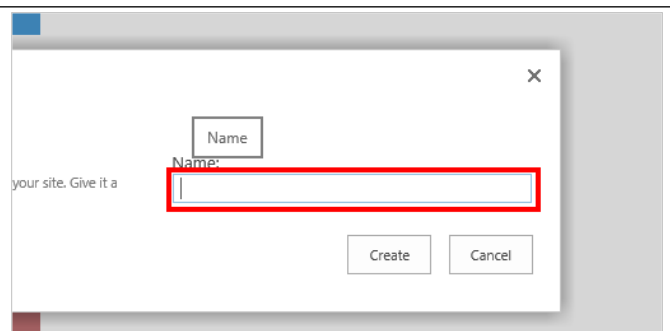
Click on the link **Next**



Click on **CLTracking-SharePoint-ListTemplate**

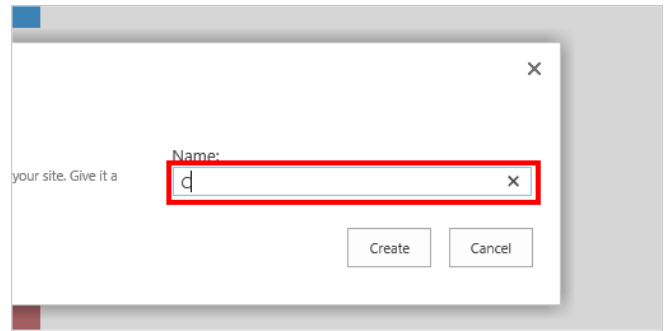


Click on the input field **Name:**

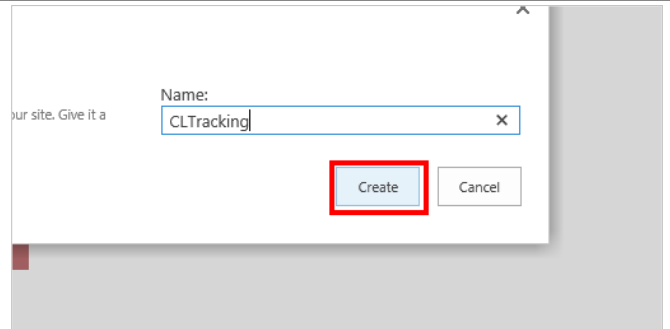


Make sure to enter the name according to the tracking id set on the shelf.

Enter the text **CLTracking**.



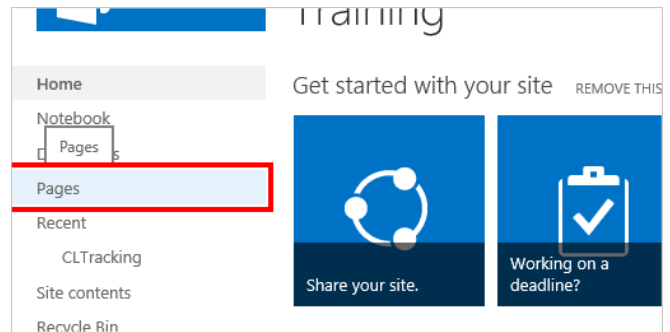
Click on the button **Create**



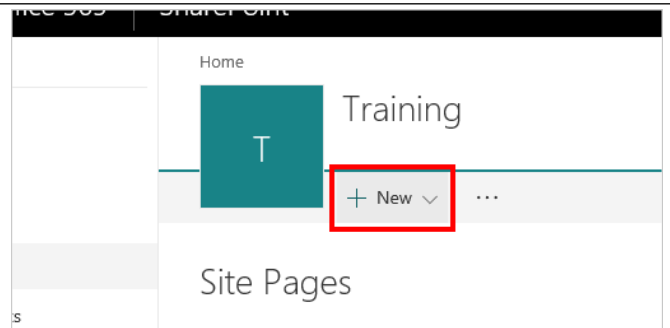
6.4. Create Web Part Page to host SharePoint content

6.4.1. New page

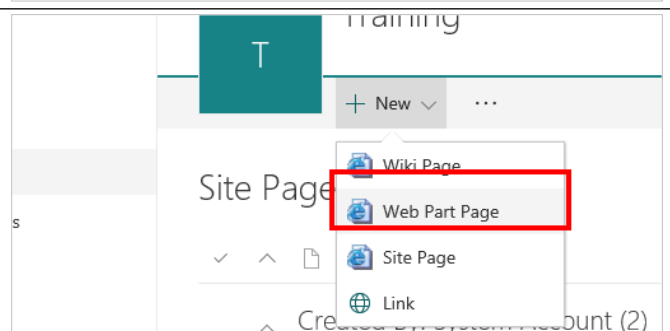
Click on the link **Pages**



Click on **New**



Click on the link **Web Part Page**



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Click on the input field **Name**

Enter the text **learning Portal**.

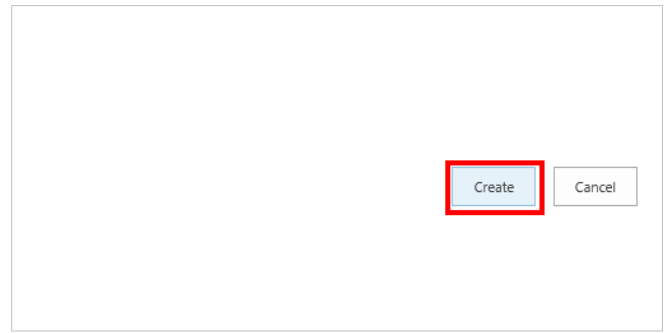
Click on the item **Full Page, Vertical** in the list

Click on the combo box **Document Library**

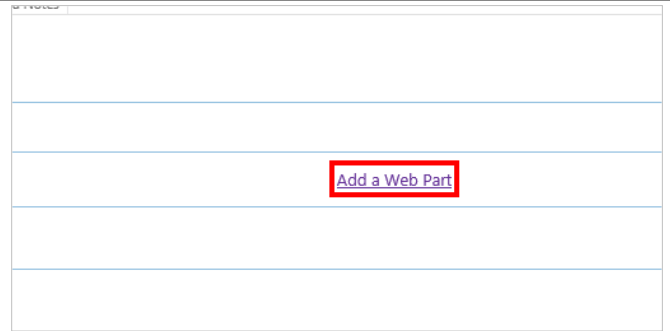
Click on the item **Site Pages** in the list

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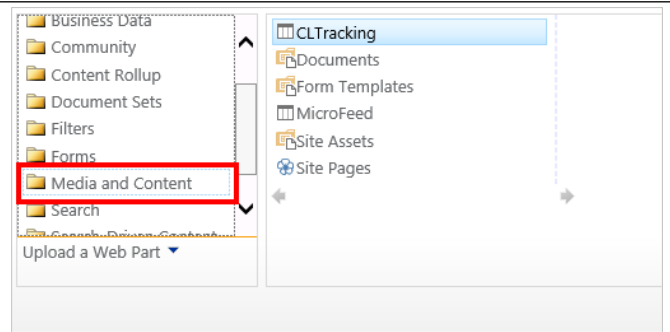
Click on the button **Create**



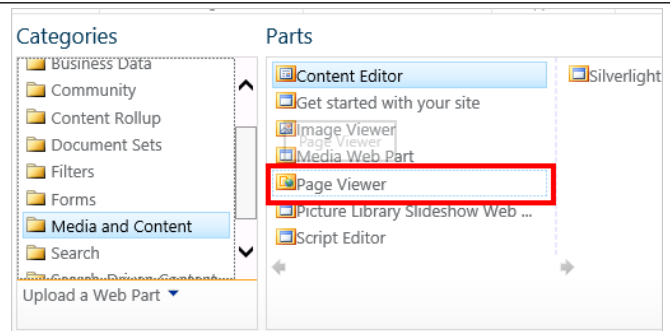
Click on **Add a Web Part**



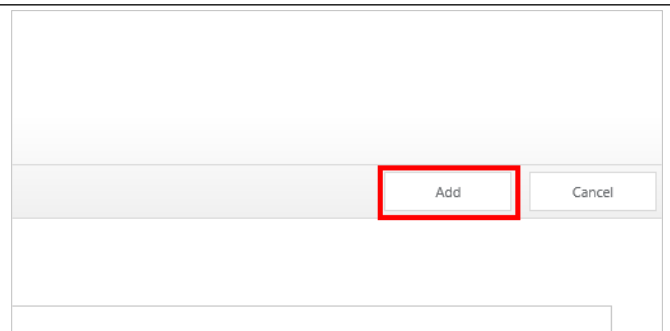
Click on **Media and Content**



Click on **Page Viewer**

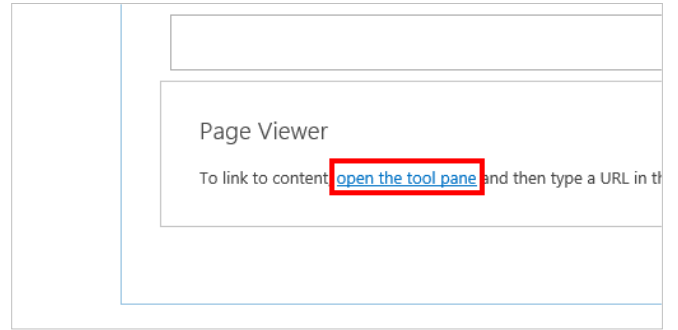


Click on the button **Add**

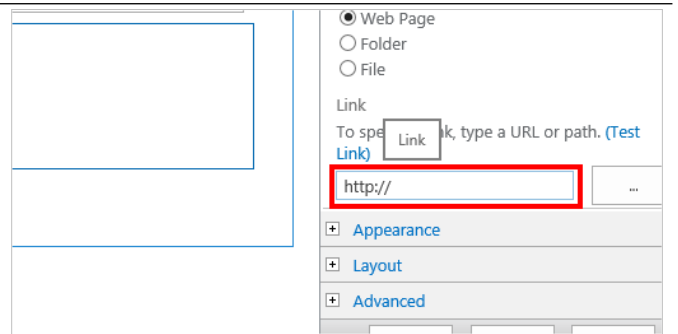


6.4.2. Page Viewer settings

Click on the link **open the tool pane**

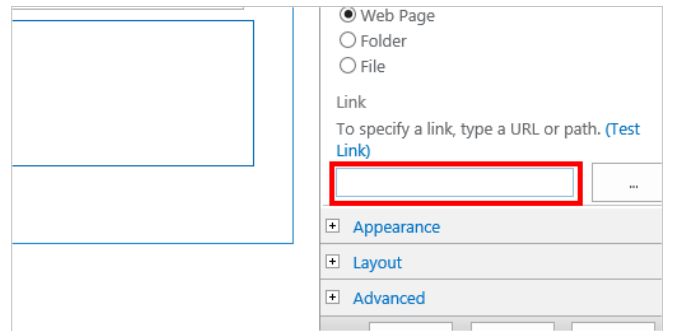


Click on the input field **Link**.



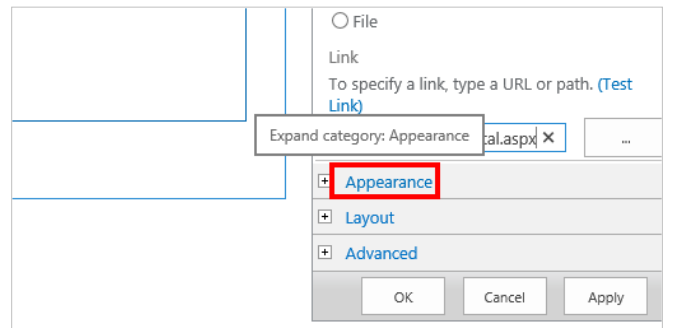
The path should be entered relative to the path where the page is stored.

Enter the text **../SiteAssets/ClickLearn Learning Portal/ClickLearn Learning Portal.aspx**.



6.4.3. Appearance

Click on the link **Expand category: Appearance**



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Click on the radio button **Yes**

We recommend that you find the best suitable height for your page viewer content,

Click on the input field **Type a number for the Height.**

Enter the text **700.**

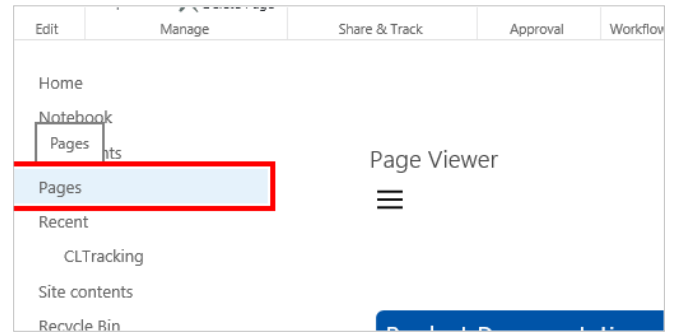
Click on the button **OK**

Click on **Stop Editing**

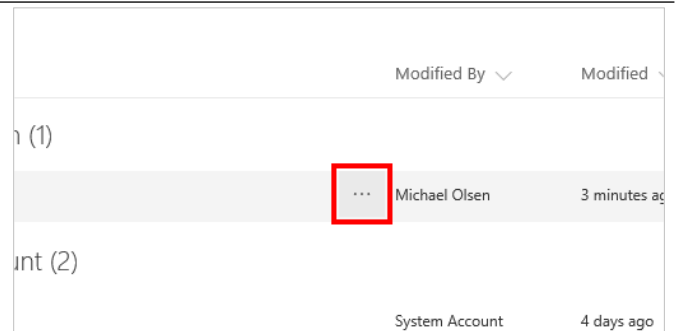
6.4.4. Add to navigation

It is not required, but this is how you may add the new page to the navigation.

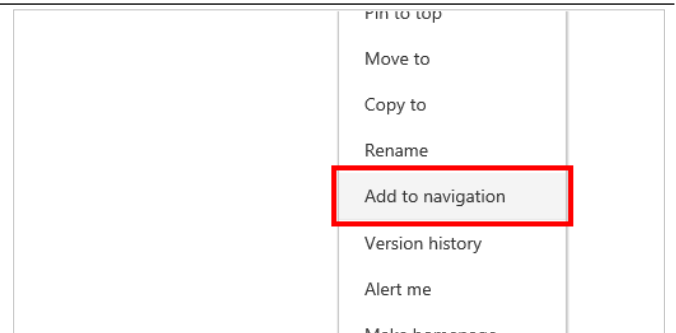
Click on the link **Pages**



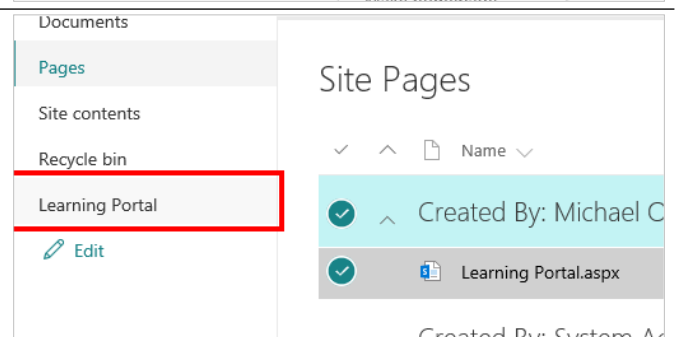
Click on the button



Click on the link **Add to navigation**



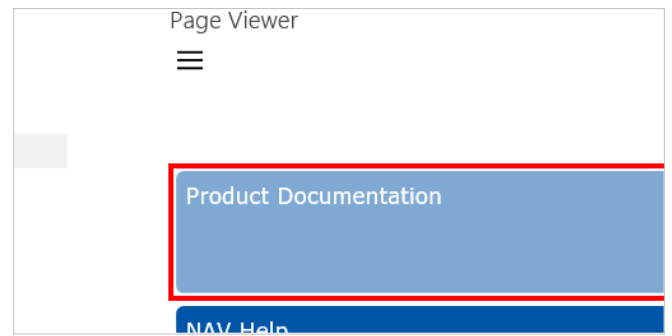
Click on the link **Learning Portal**



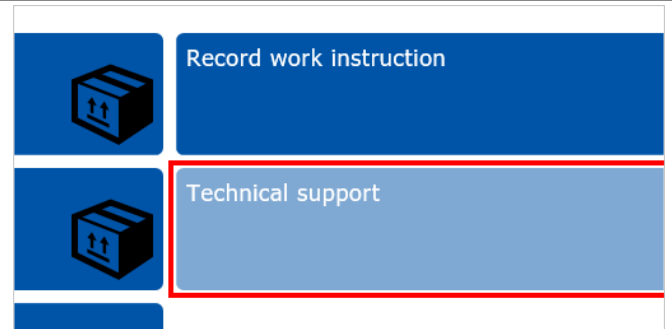
6.5. SharePoint tracking

This example shows what happens when tracking is enabled and a user browses the content.

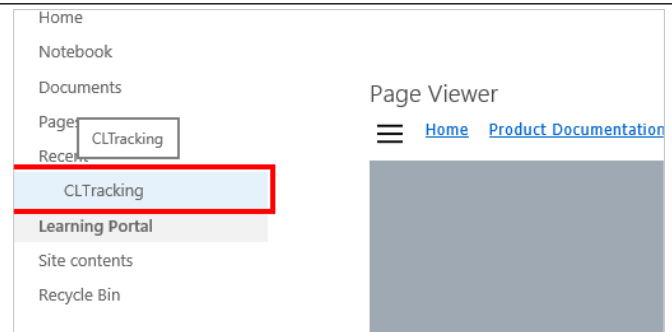
Click on **Product Documentation**



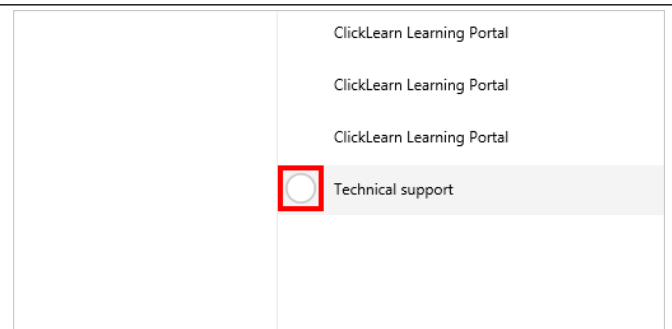
Click on **Technical support**



Click on the link **CLTracking**



Click to mark the last tracking record.



The list now indicates the content that has been accessed.

7. Preferences

7.1. Create a new template

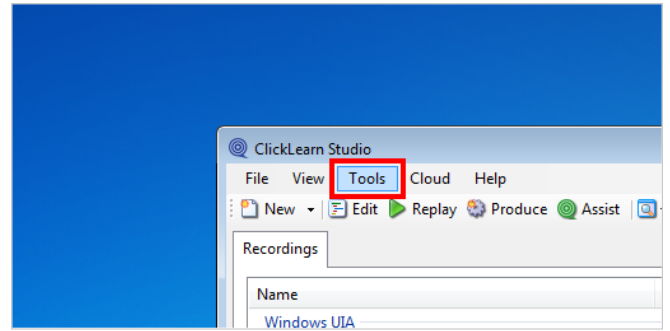
7.1.1. Introduction

ClickLearn provides the ability to create and maintain your own templates, where logo, color, image control and video settings may be adjusted.

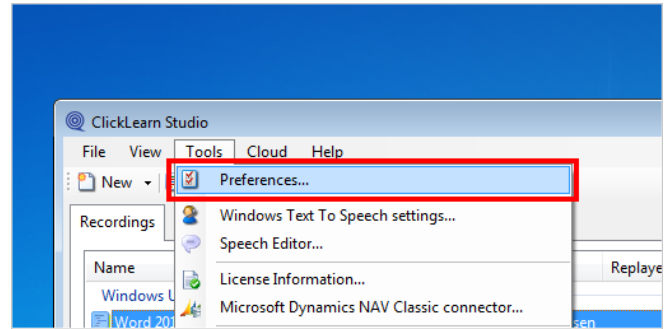
Any modifications done will apply to every recording produced with template.

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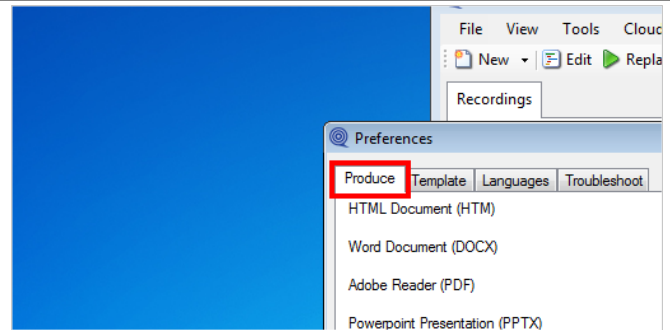
Click on the menu **Tools**.



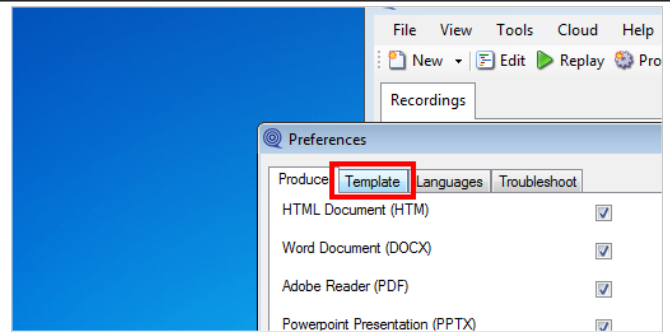
Click on the menu **Preferences...**



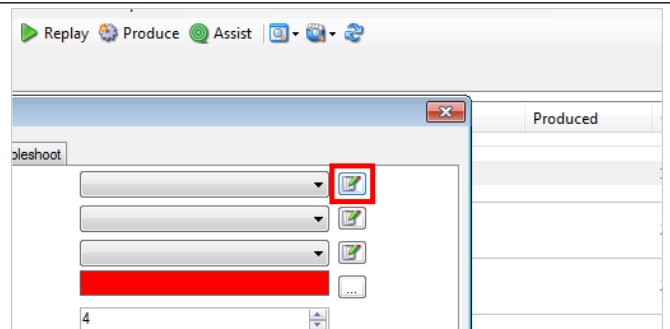
Click on the tab **Produce**.



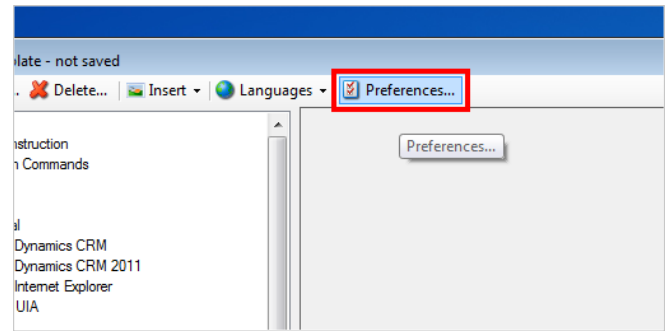
Click on the tab **Template**.



Click on the button **Edit recording template**.



Click on the button **Preferences....**

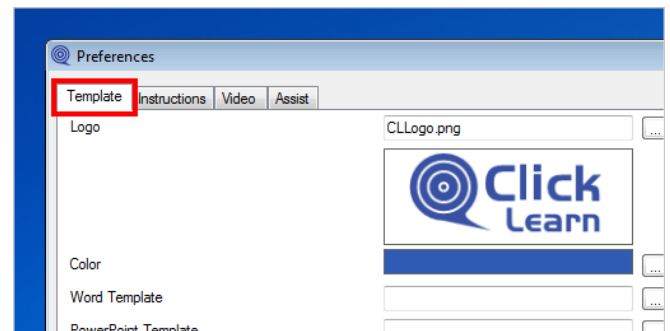


7.1.2. Logo and color

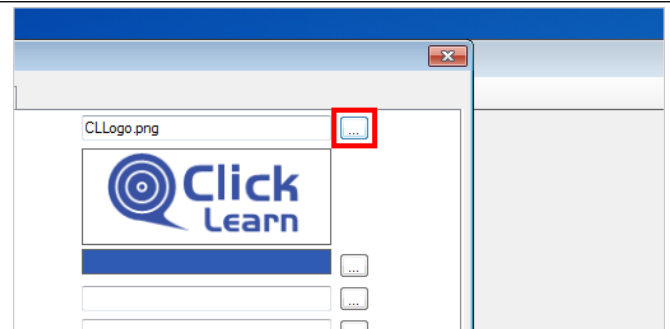
The template contains a logo and a main color, which is used in many of the documents produced.

When you change the logo it will replace the ClickLearn logo in all documents, apart from the video intro and outro screen.

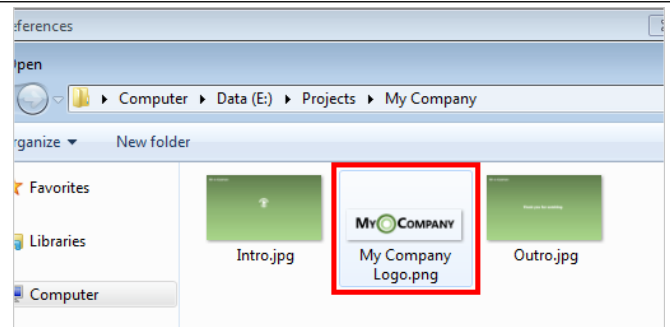
Click on the tab **Template**.



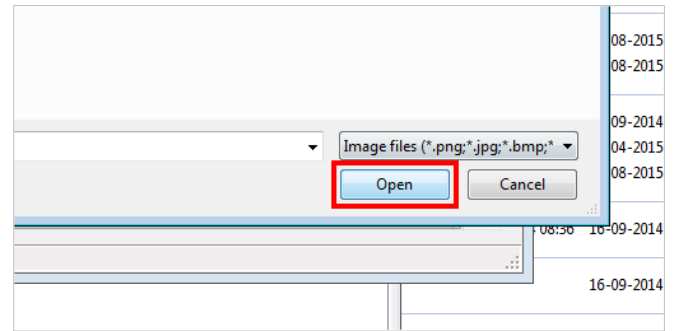
Click on the button **Open logo file**.



Click on the list element **My Company Logo.png**.



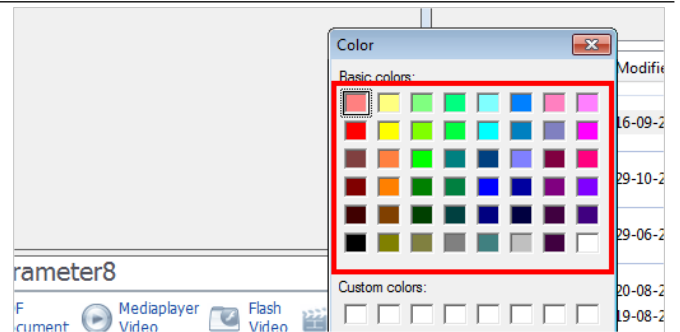
Click on the button **Open**.
You may also press **Alt+O**.



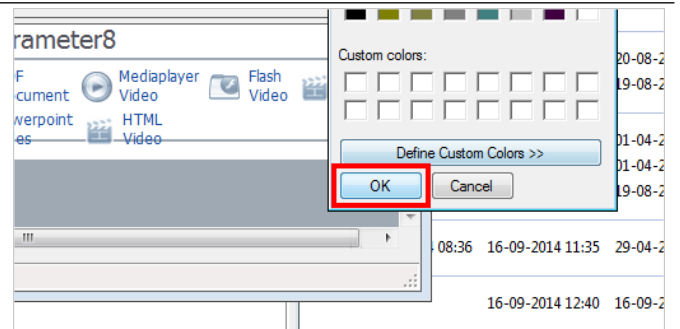
Click on the button **Change color**.



Select a color.

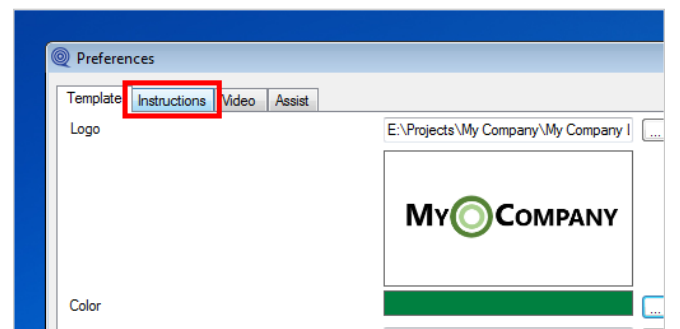


Click on the button **OK**.



7.1.3. Thumbnail image size

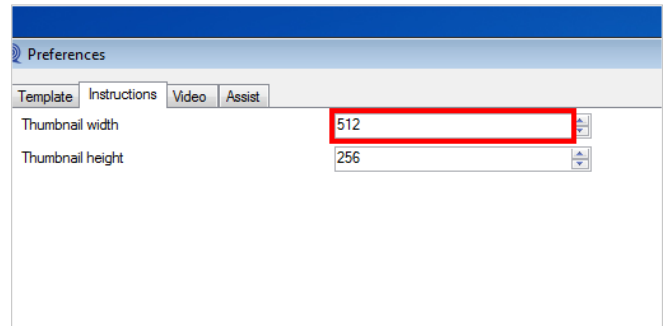
Click on the tab **Instructions**.



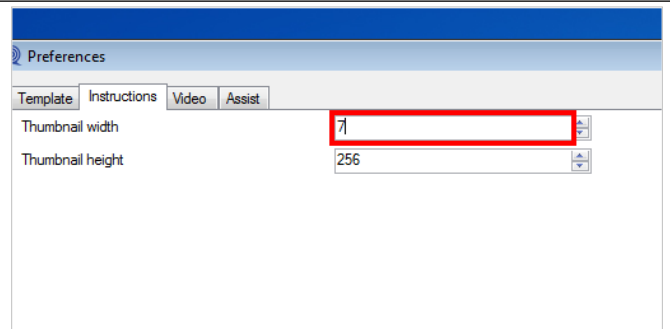
The template controls the cropped image used for each step in the written documentation.

You are able to change the size here, if you need a wider or higher image.

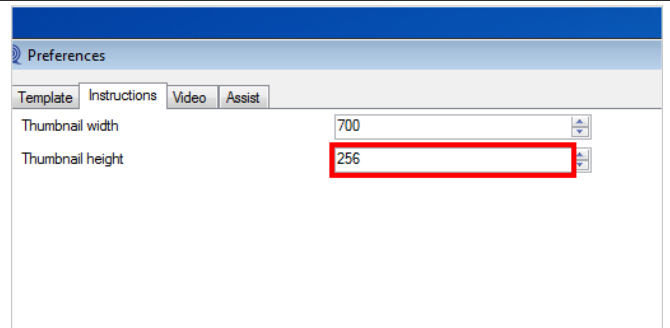
Double click on the input field **Thumbnail width**.



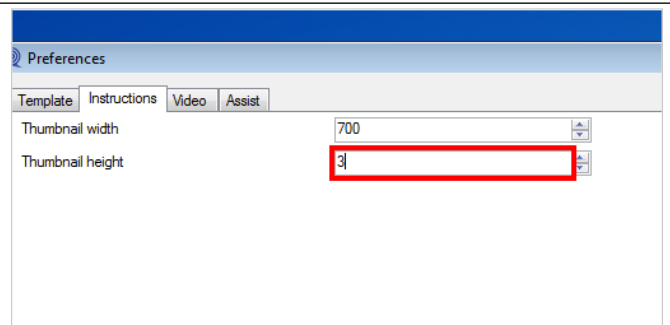
Enter **Thumbnail width**.



Double click on the input field **Thumbnail height**.

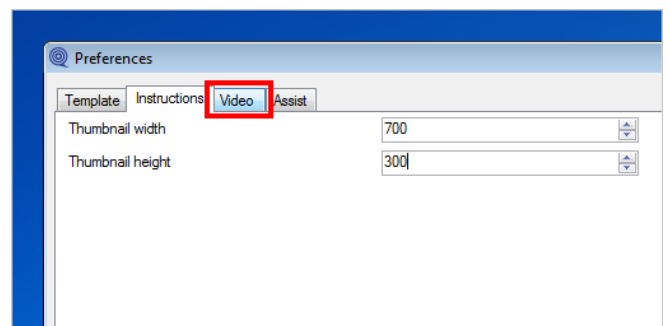


Enter **Thumbnail height**.

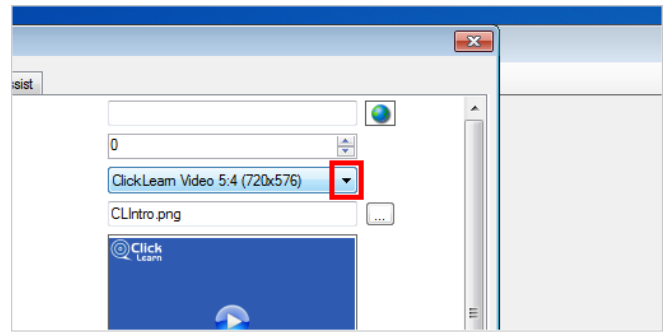


7.1.4. Video settings

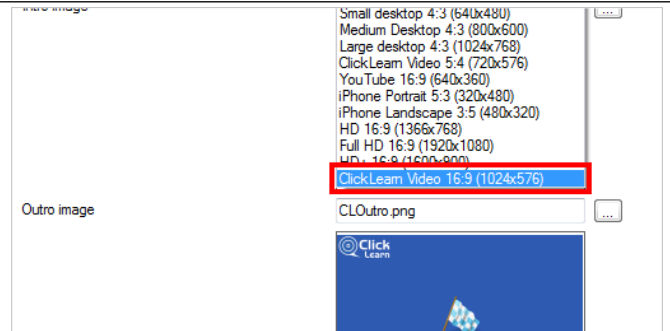
Click on the tab **Video**.



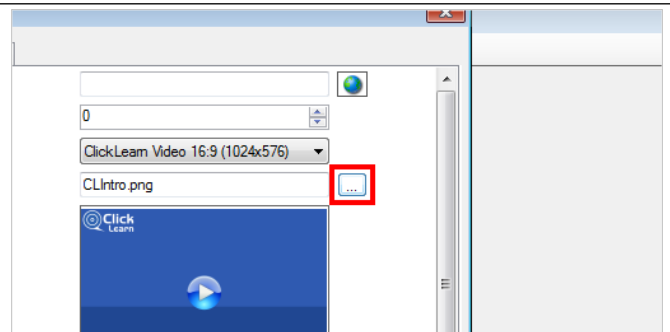
Click on the button **Open**.
You may also press **Alt+Down Arrow**.



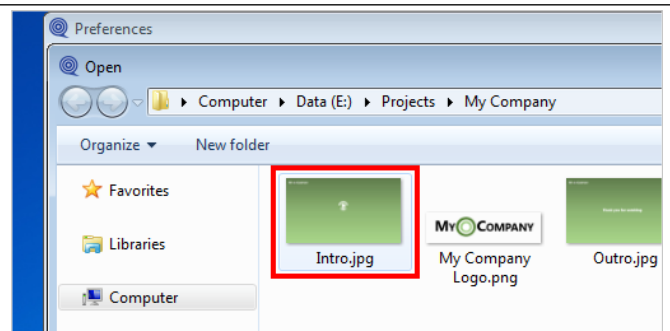
Click on the list element **ClickLearn Video 16:9 (1024x576)**.



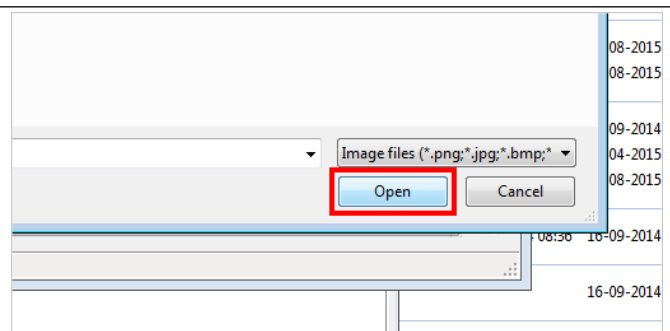
Click on the button **Open intro file**.



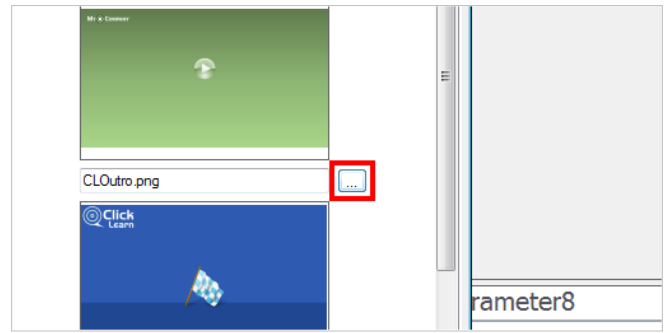
Select an image file for the video start screen.



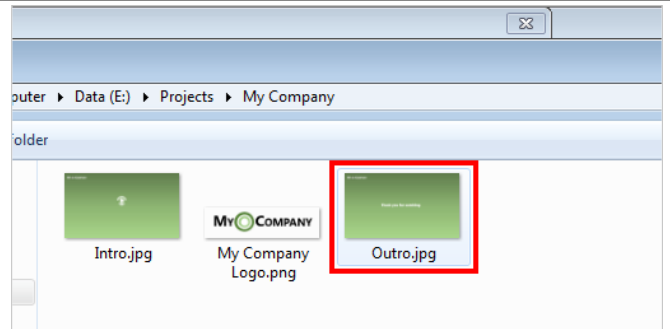
Click on the button **Open**.
You may also press **Alt+O**.



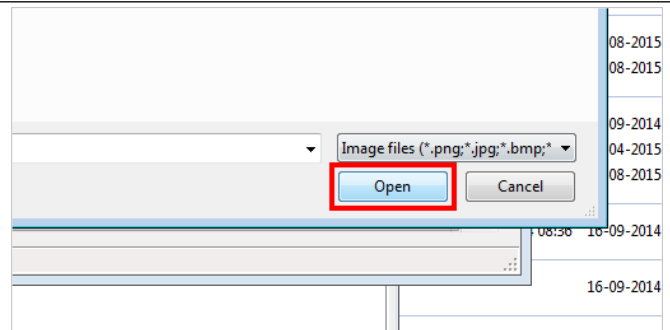
Click on the button **Open outro file**.



Select an image file for the video end screen.



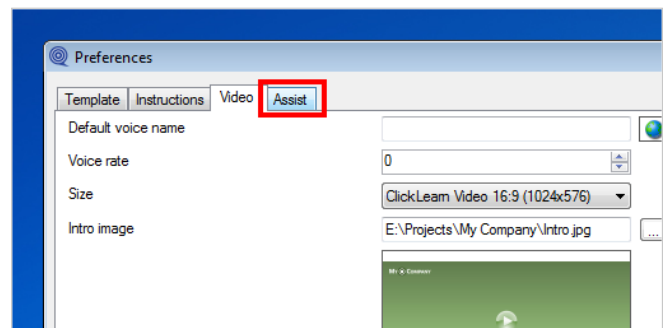
Click on the button **Open**.
You may also press **Alt+O**.



7.1.5. Your own mascot for the live assistant

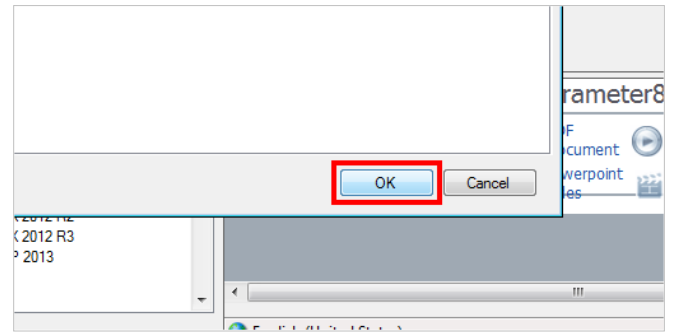
The assistant is also based on a template, which is a plain image with a specific structure. If you want to provide your mascot, please contact ClickLearn.

Click on the tab **Assist**.



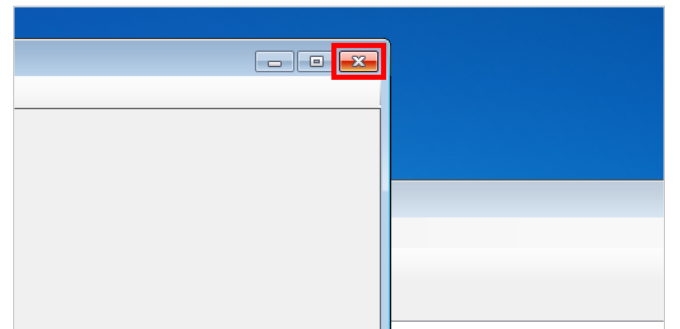
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Click on the button **OK**.
You may also press **Alt+O**.

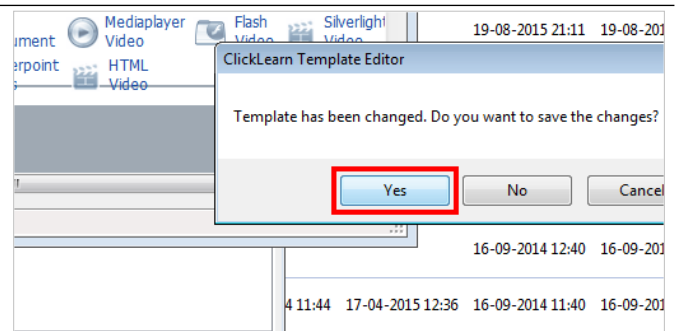


7.1.6. Save the template

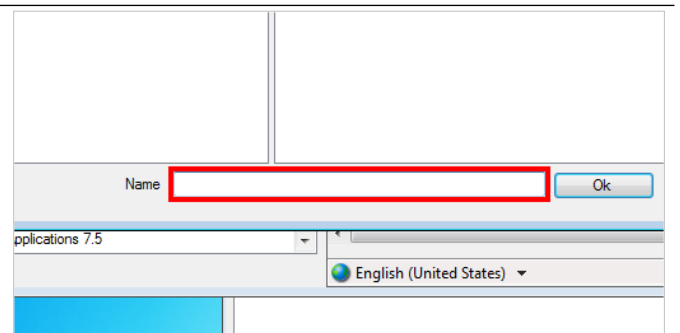
Click on the button **Close**.



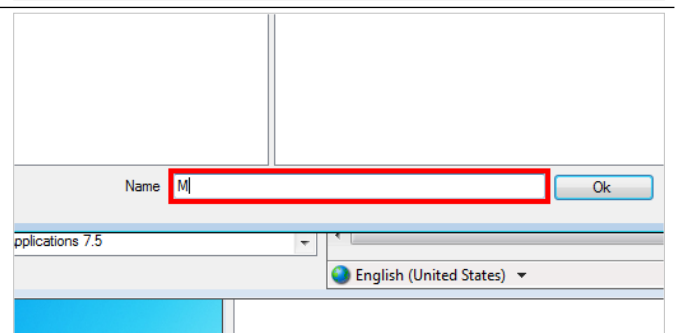
Click on the button **Yes**.
You may also press **Alt+Y**.



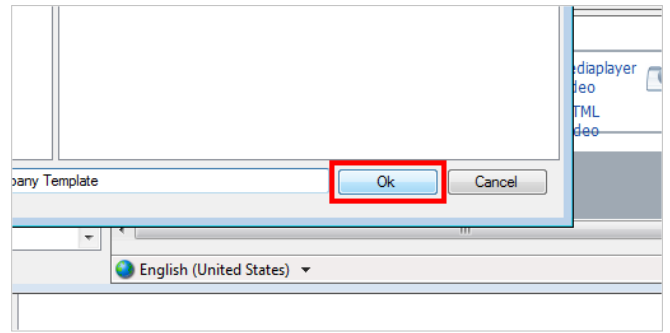
Click on the input field **Name**.



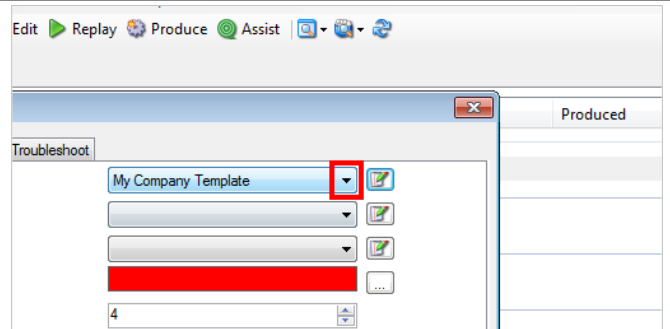
Enter a **template name**.



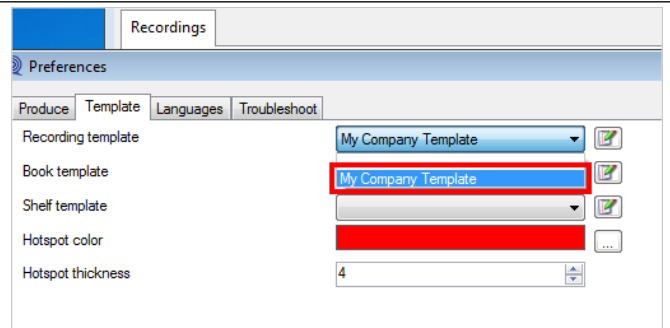
Click on the button **Ok**.
You may also press **Alt+O**.



Click on the button **Open recording template**.
You may also press **Alt+Down Arrow**.



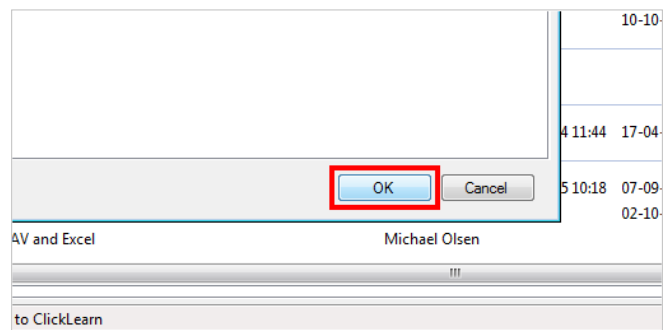
Click on the list element **My Company Template**.



You now have a custom template active in ClickLearn.

Remember to reproduce your material after any change in the template.

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



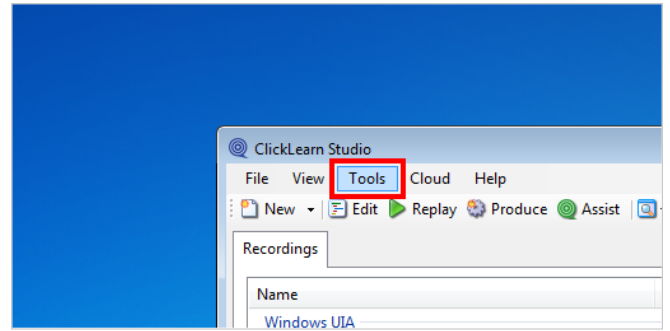
7.2. Change connector specific template text

Every step recorded with ClickLearn results in a process text.

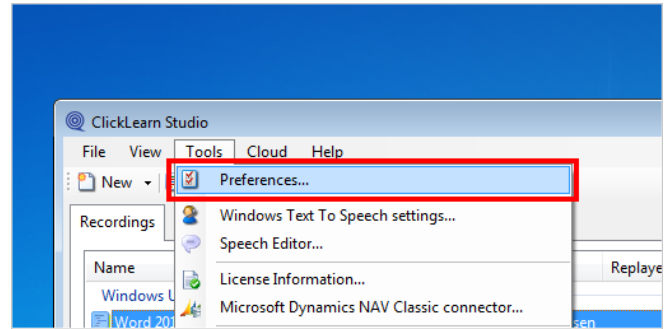
The text consists on text from the template and text retrieved by the recording connector.

Here you will find an example on how to change a connector specific text in the template.

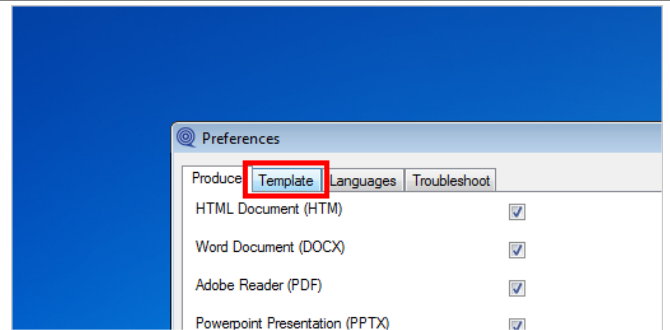
Click on the menu **Tools**.



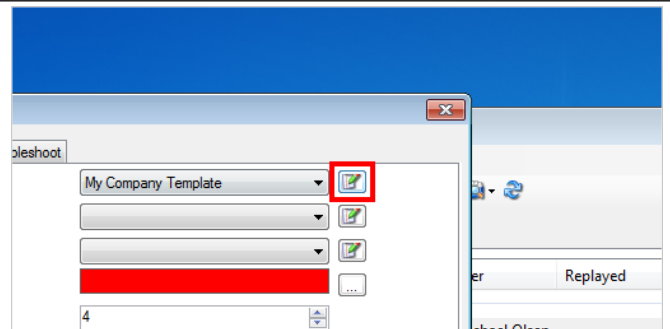
Click on the menu **Preferences...**



Click on the tab **Template**.

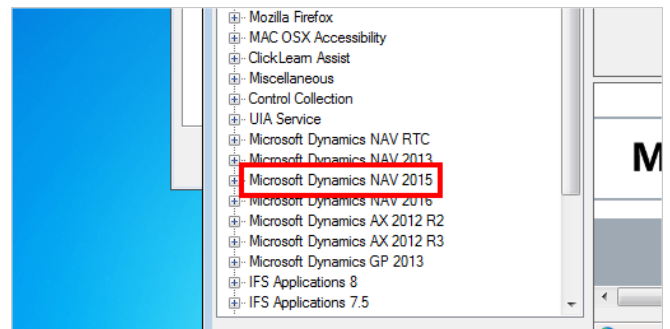


Click on the button **Edit recording template**.



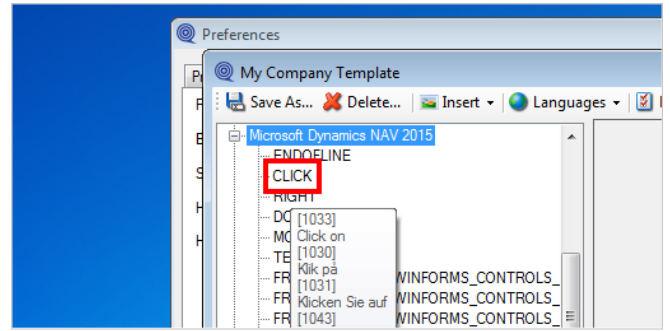
In the navigation tree we have to open the connector specific folder.

Double click on the folder **Microsoft Dynamics NAV 2015**.

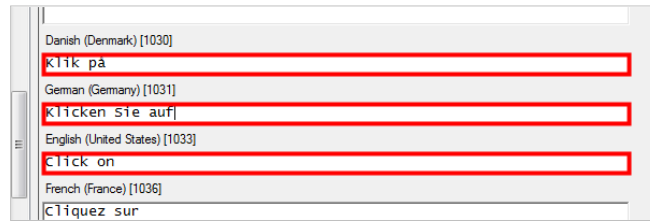


Then, we need to locate the text entry that needs to be changed.

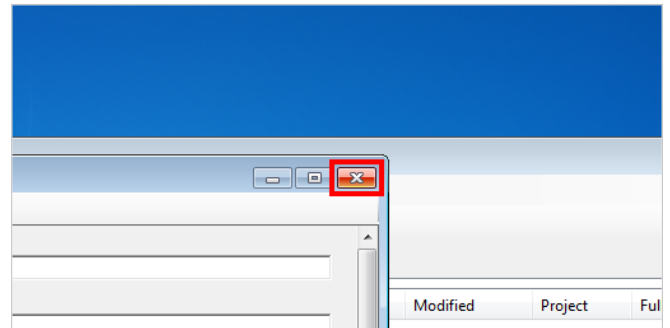
Click on the folder **CLICK**.



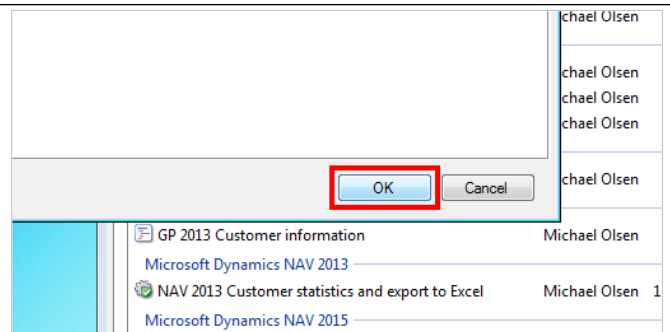
On the right hand side you will find an text field for each language you have setup in ClickLearn. You may then change the text.



Click on the button **Close**.



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



7.3. Create a new workspace

7.3.1. Introduction

A workspace is a special file repository, which may contain multiple templates.

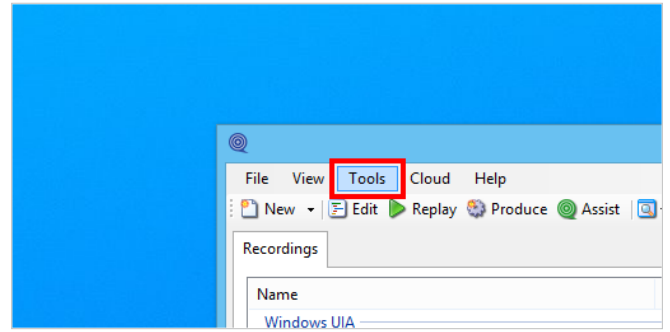
It is commonly used to store the company templates in a central location, where all ClickLearn users have access to.

7.3.2. Create a template

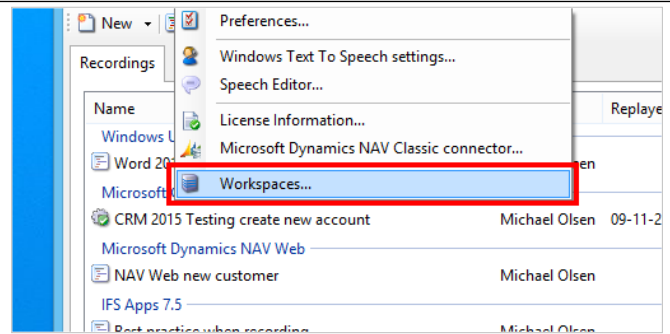
It is recommended that workspaces are stored on a shared drive.

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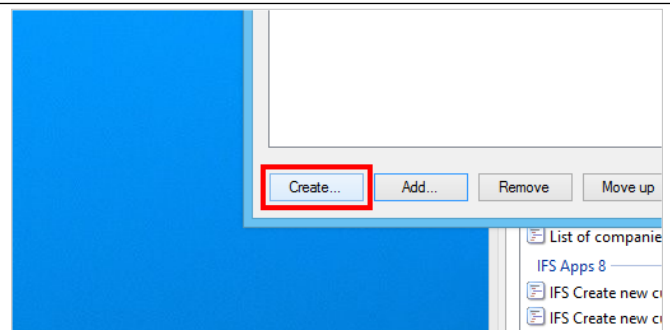
Click on the menu **Tools**.



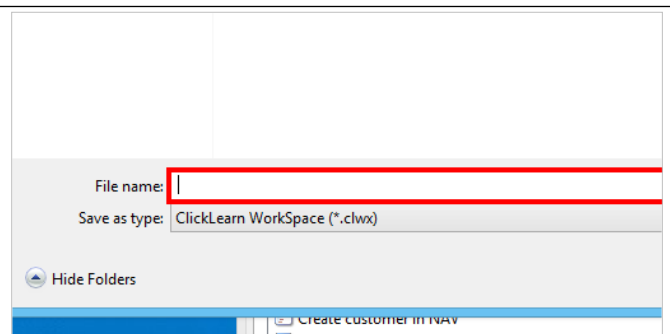
Click on the menu **Workspaces...**



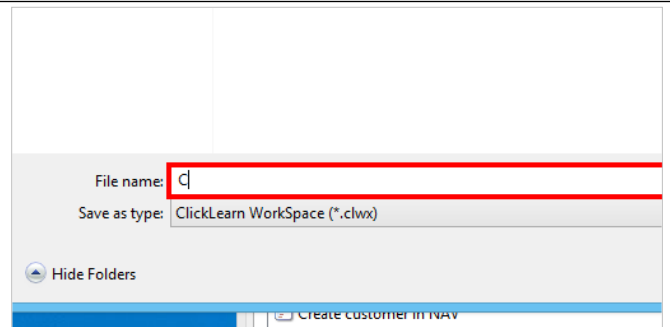
Click on the button **Create...**
You may also press **ALT+C**.



Click on **File name:**
You may also press **ALT+N**.

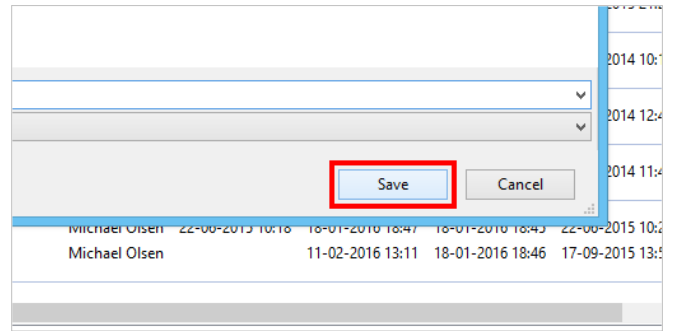


Enter **File name:**

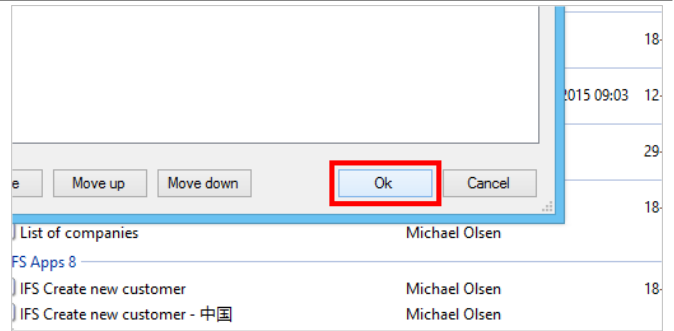


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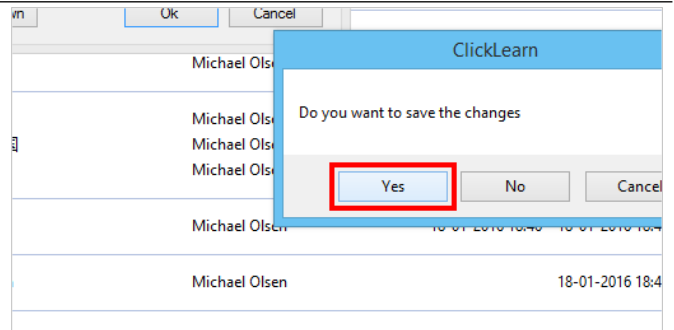
Click on the button **Save**.
You may also press **Alt+S**.



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



Click on the button **Yes**.
You may also press **Alt+Y**.

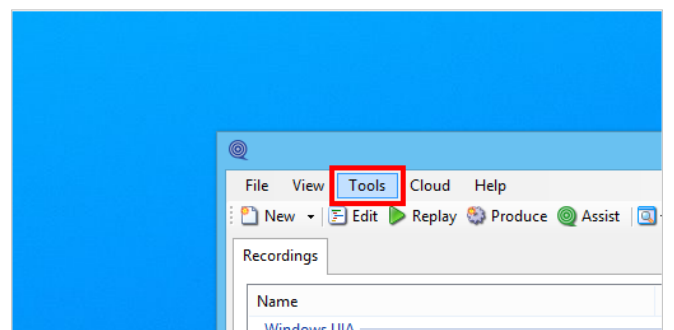


7.3.3. Copy a locally stored template to a workspace

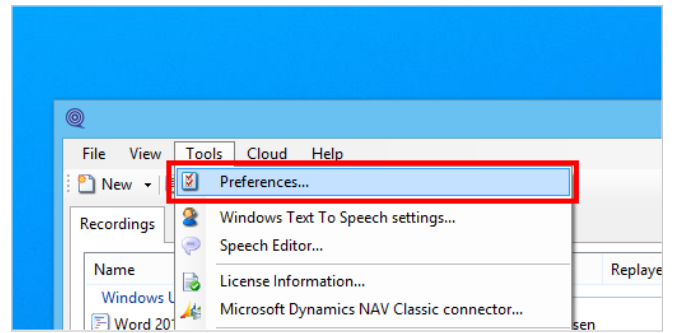
Normally, when a template is saved, it is saved locally on the PC.

The following steps will show how to open a locally stored template and save it into a workspace.

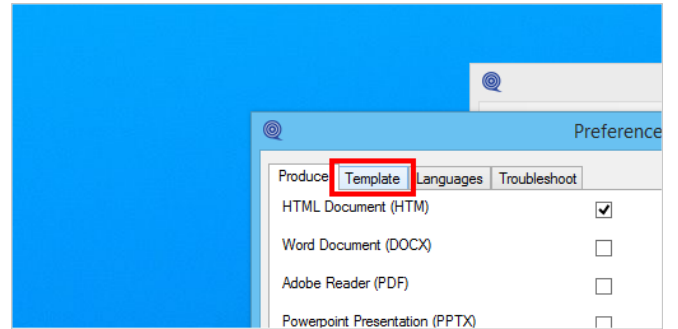
Click on the menu **Tools**.



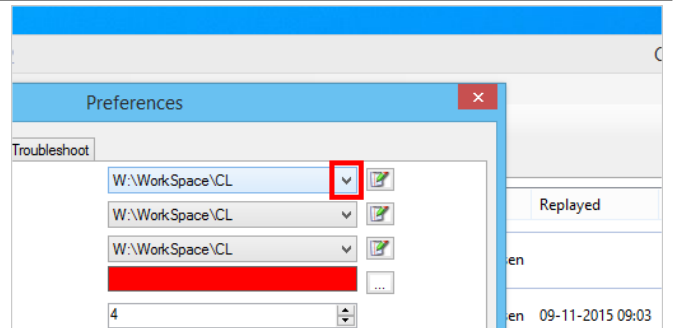
Click on the menu **Preferences...**



Click on the tab **Template**.



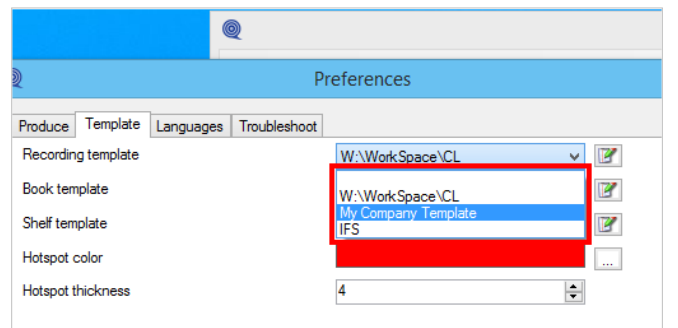
Click on the button **Open**.
You may also press **Alt+Down Arrow**.



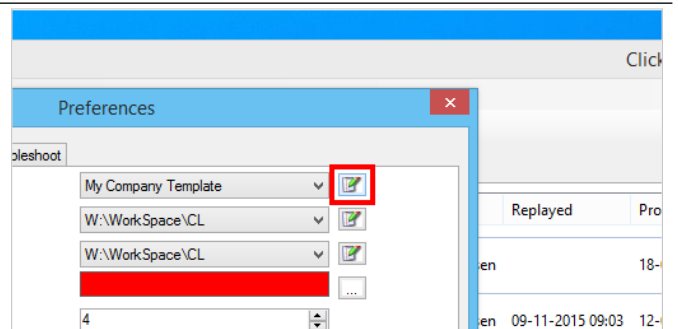
The list will show all available recording templates. The names starting with W:\ refers to workspace files.

Please note, the W:\ is not a network drive letter, but just W for Workspace.

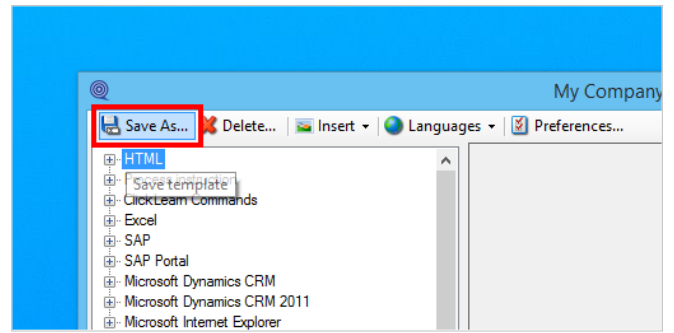
Select a local template.



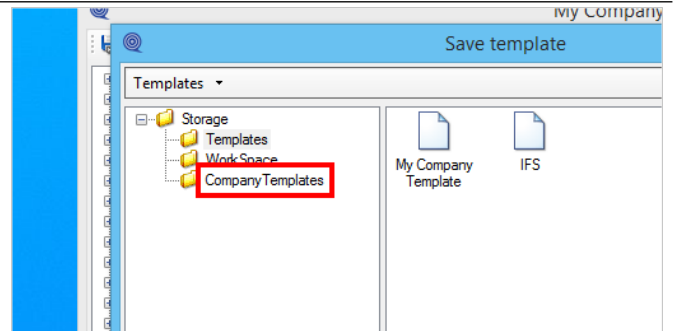
Click on the button **Edit template**.



Click on the button **Save As....**



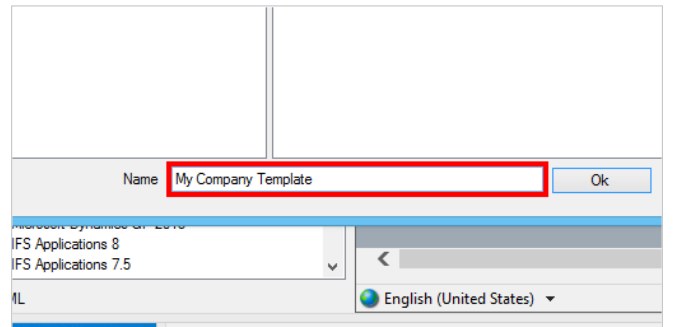
Click on the folder **CompanyTemplates**.



The folder structure to the left is a list of the available storage locations.

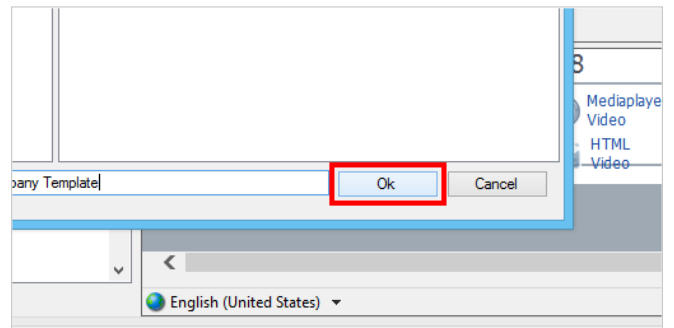
The folder named Templates is for the local storage and the rest is for available workspaces.

Click on the input field **Name**.

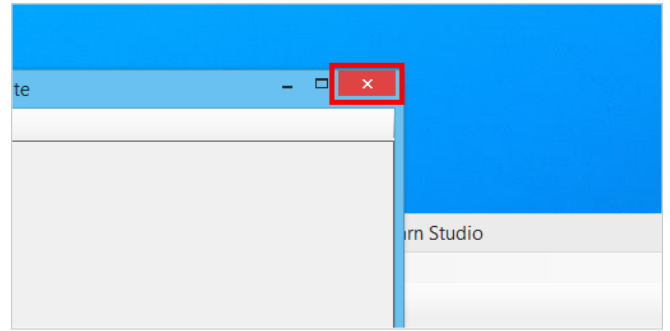


The same name as the template selected is used by default, but it may be changed here.

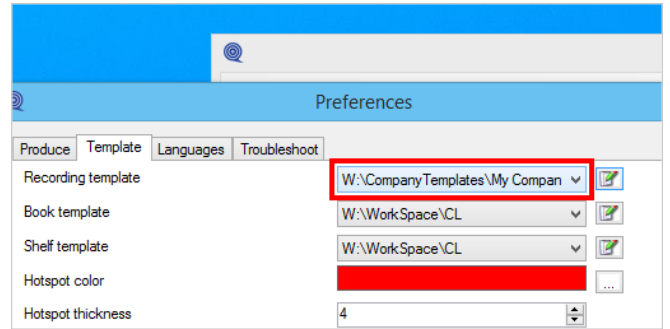
Click on the button **Ok**.
You may also press **Alt+O**.



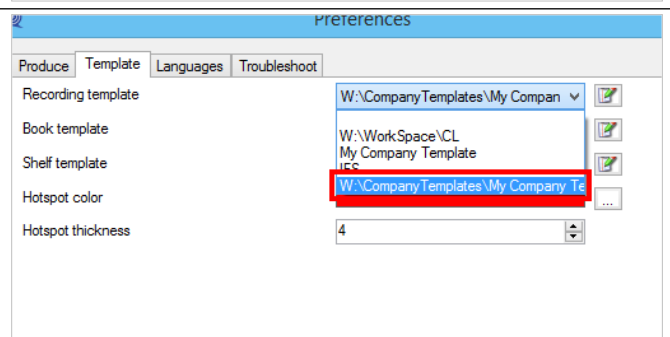
Click on the button **Close**.



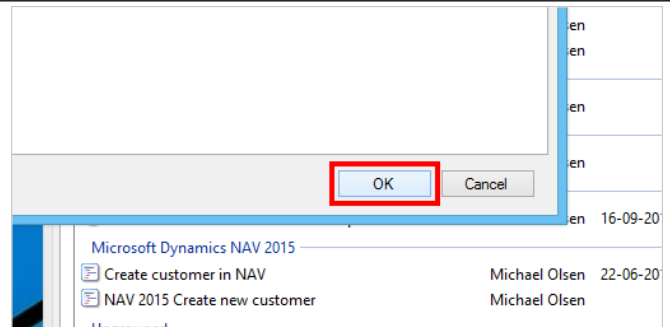
Click on the combo box **Recording template**.



Click on the list element **W:\CompanyTemplates\My Company Template**.



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



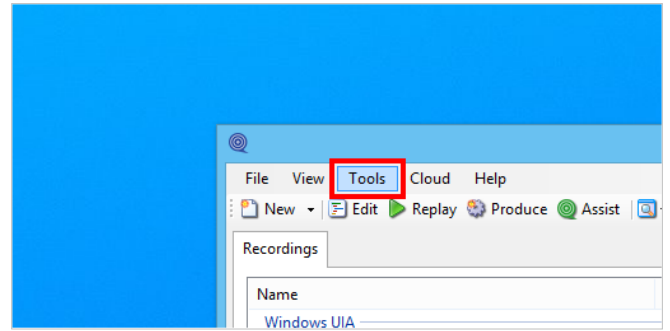
The template from the workspace is now selected. Please remember to reproduce to get the new template look in the material.

7.4. Add a workspace

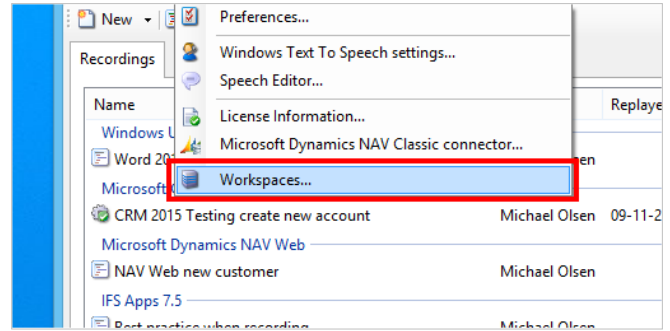
If a workspace file is available, it can be attached to the ClickLearn installation on the PC.

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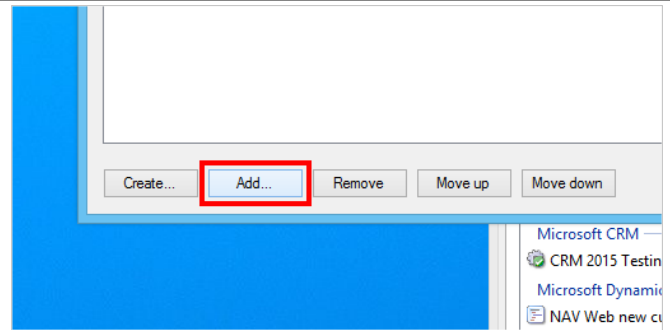
Click on the menu **Tools**.



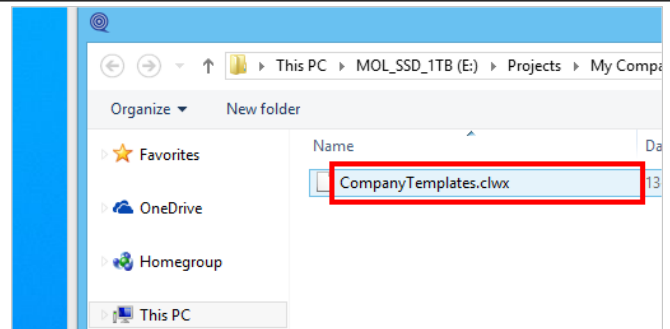
Click on the menu **Workspaces...**



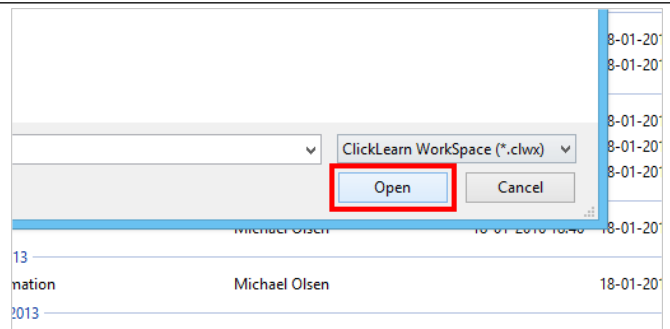
Click on the button **Add...**.
You may also press **Alt+A**.



Select the workspace file.

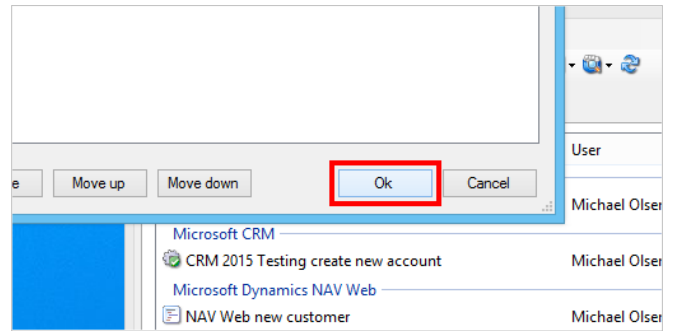


Click on the button **Open**.
You may also press **Alt+O**.

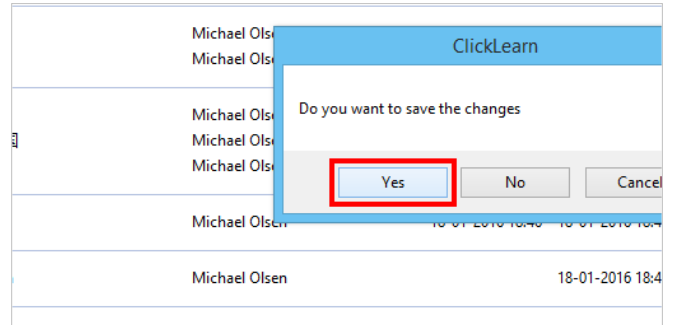


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Click on the button **Ok**.
You may also press **Alt+O**.

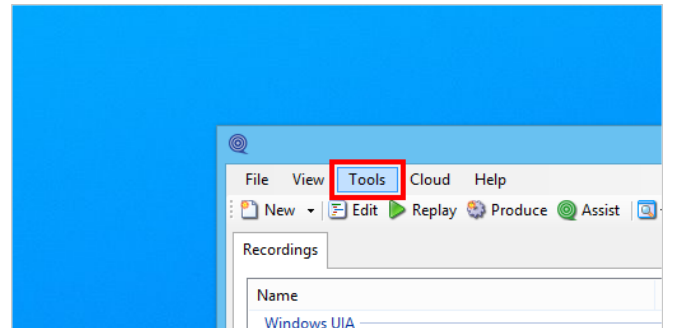


Click on the button **Yes**.
You may also press **Alt+Y**.

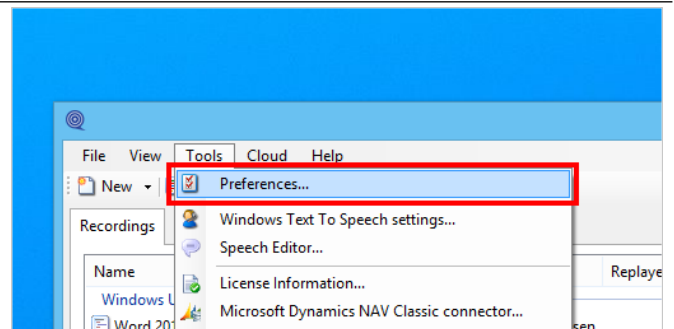


Once the workspace have been added you need to select a recording, book and shelf template.

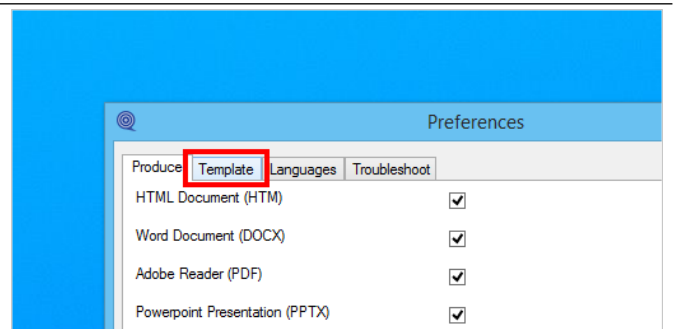
Click on the menu **Tools**.



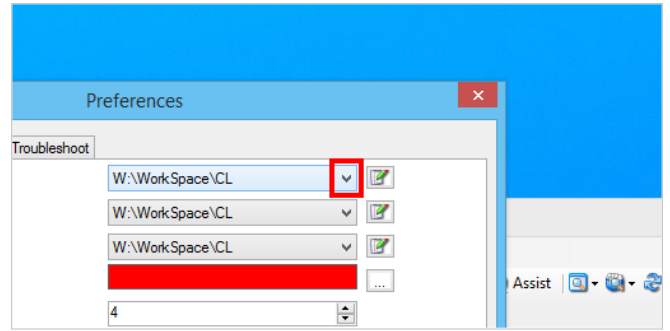
Click on the menu **Preferences...**



Click on the tab **Template**.



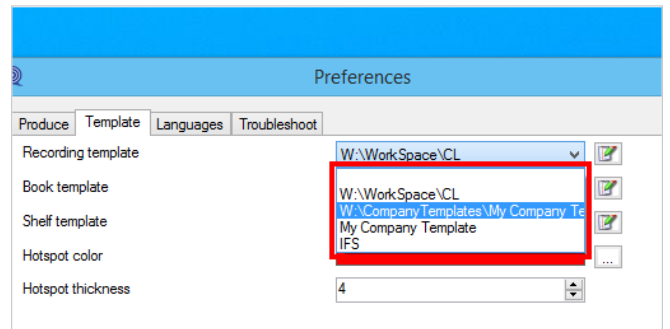
Click on the button **Open**.
You may also press **Alt+Down Arrow**.



In this list you will find all available templates.

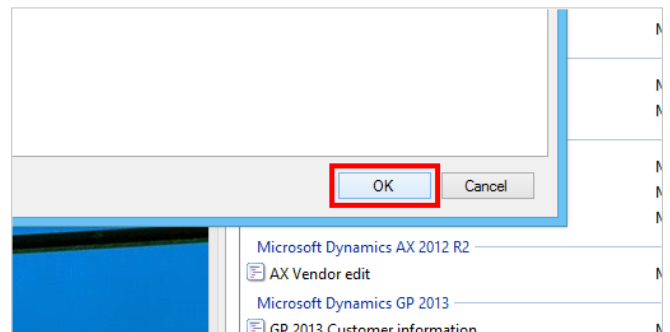
Please note, the W:\ is not a network drive letter, but just W for Workspace.

Click on a list element.



Please remember to look if a book template and shelf template is available.

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



8. Languages and Translation

8.1. Multiple languages

8.1.1. Introduction

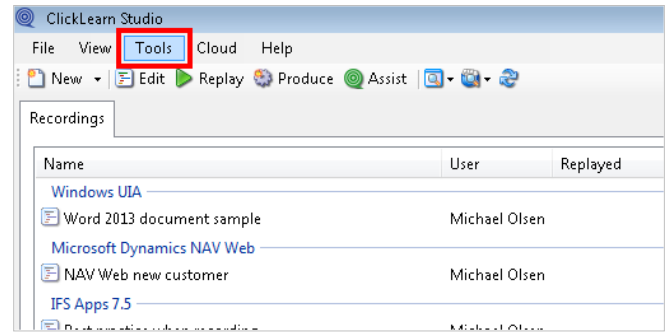
ClickLearn allows you to work with multiple languages.

When ClickLearn is installed it will automatically add the default Windows system language.

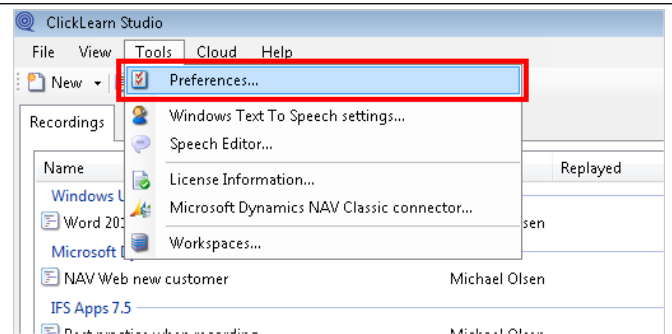
You will only have access to the languages added to ClickLearn in its preferences.

8.1.2. Setup languages

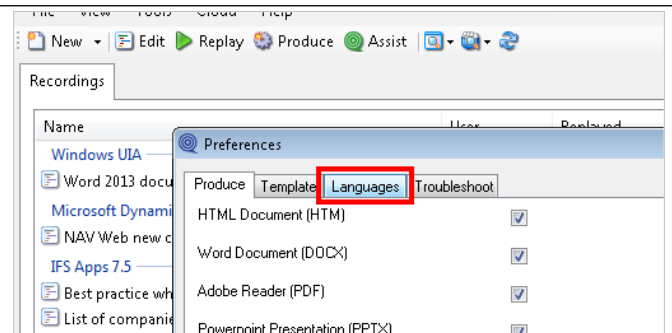
Click on the menu **Tools**.



Click on the menu **Preferences...**

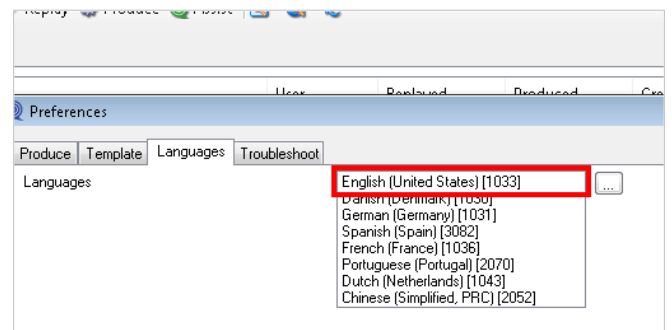


Click on the tab **Languages**.

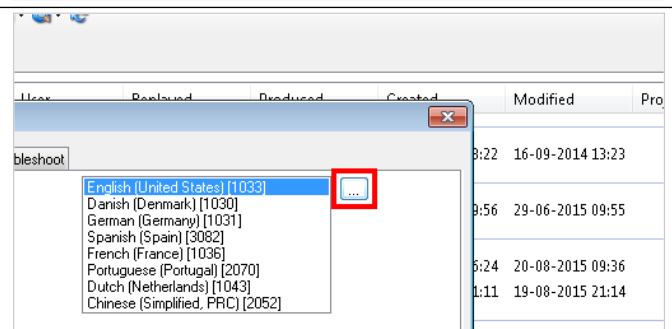


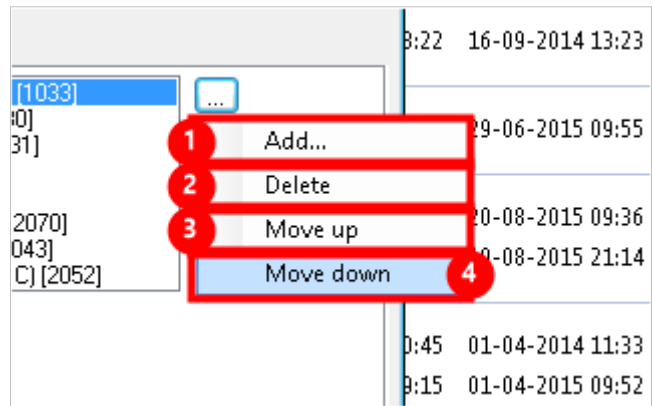
Here you can see the languages already added to ClickLearn. The order of the languages may be changed, and the first language on the list will be the default language used, when you work with your recordings.

Click on the list element **English (United States) [1033]**.



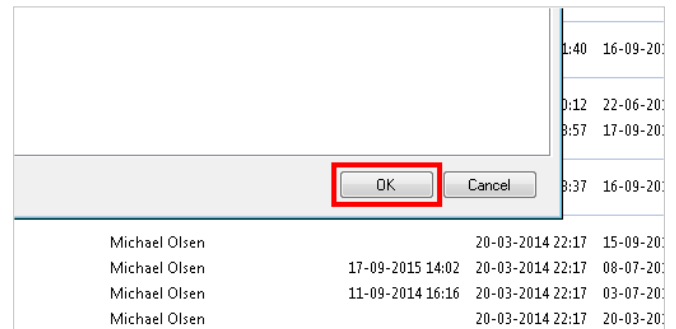
Click on the button ...





1. Add any language to the list that is known by the Windows operating system.
2. Delete the currently selected language.
3. Move the selected language up in the list.
4. Move the selected language down in the list.

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



8.2. Translation

8.2.1. Introduction

When you have setup multiple languages in ClickLearn and you are logged on the ClickLearn Cloud, you may use the translation feature.

The translation feature can make an auto translation from and to many languages and is based on the Microsoft Azure translation service.

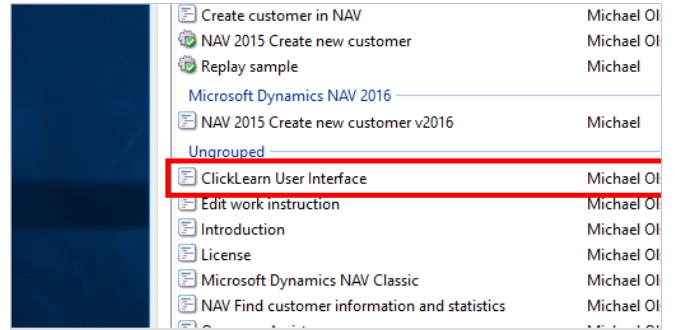
Translation will **ONLY** translate the text you have manually added to recordings, like chapter names, notes and custom instruction text.

It will not translate any captions retrieved from recording the application and it will not translate any images.

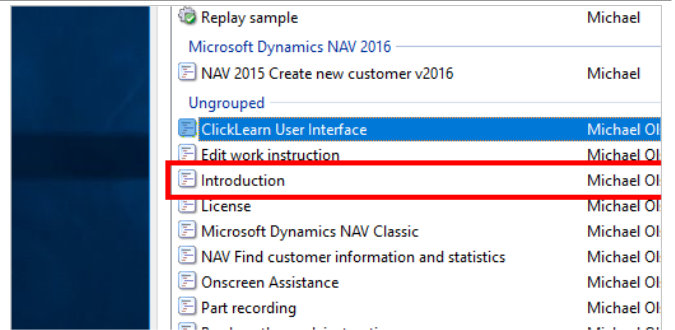
Also, please understand that an auto translation is not equal to a final translation. It is a help and should be reviewed by a translator.

8.2.2. Auto translate one or more multiple files

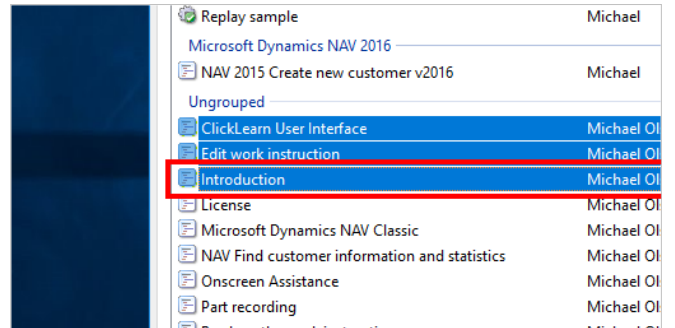
Click on the list element **ClickLearn User Interface**.



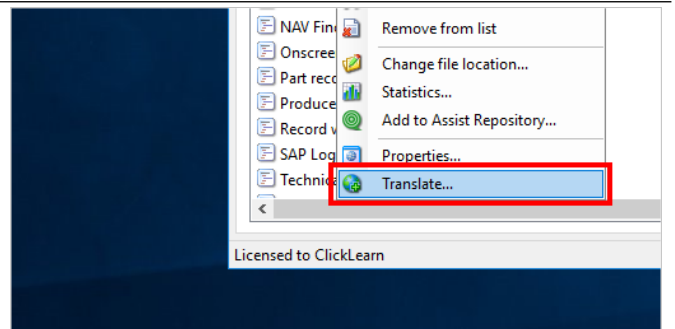
Press and hold the **Shift** key down.
Click on the list element **Introduction**.



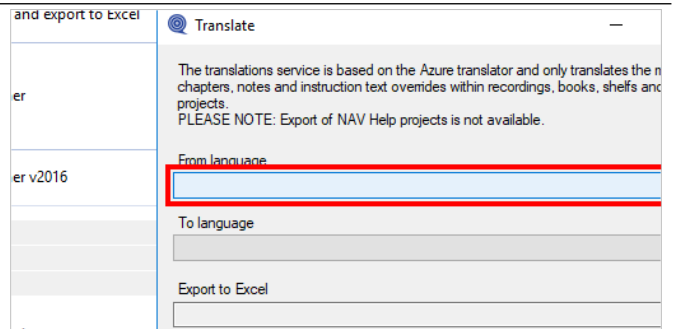
Right click on the list element **Introduction**.



Click on the menu **Translate....**



Click on the combo box **From Language**.



Click on the list element **English (United States) [1033]**.

The translations service is based on the Azure translator and only translates the chapters, notes and instruction text overides within recordings, books, shells and projects.
PLEASE NOTE: Export of NAV Help projects is not available.

From language

- English (United States) [1033]**
- Danish (Denmark) [1030]
- German (Germany) [1031]
- French (France) [1036]
- Portuguese (Portugal) [2070]
- Spanish (Spain) [3082]
- Dutch (Netherlands) [1043]
- Chinese (Simplified, PRC) [2052]
- Swedish (Sweden) [1053]
- Arabic (Saudi Arabia) [1025]

Click on the combo box **To Language**.

From language

English (United States) [1033]

To language

Export to Excel

Export only

OK

Click on the list element **German (Germany) [1031]**.

From language

English (United States) [1033]

To language

- English (United States) [1033]
- Danish (Denmark) [1030]
- German (Germany) [1031]**
- French (France) [1036]
- Portuguese (Portugal) [2070]
- Spanish (Spain) [3082]
- Dutch (Netherlands) [1043]
- Chinese (Simplified, PRC) [2052]
- Swedish (Sweden) [1053]
- Arabic (Saudi Arabia) [1025]

Michael Olsen 19-06-2017 12:54

Click on the button

File name: v2016

Save as type: ClickLearn Translations in Excel document (*.xlsx)

Hide Folders

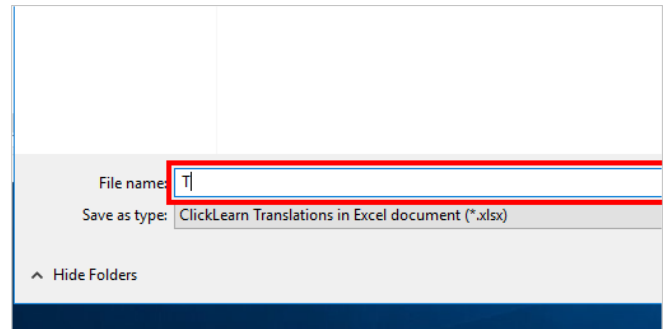
Click on the combo box .
You may also press ALT+N.

File name: |

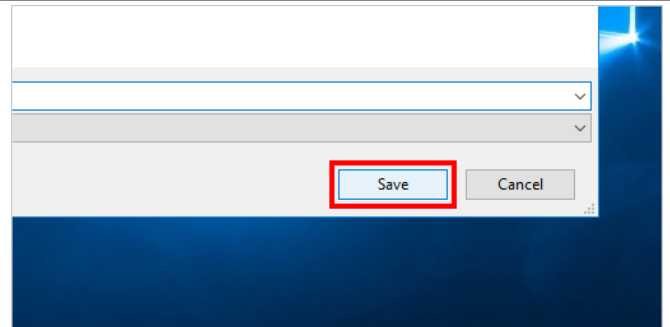
Save as type: ClickLearn Translations in Excel document (*.xlsx)

Hide Folders

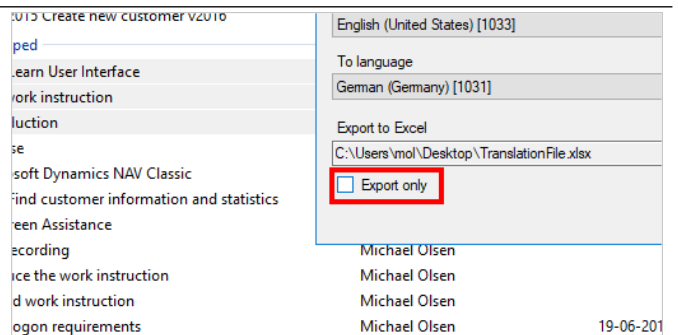
Enter the text **TranslationFile**.



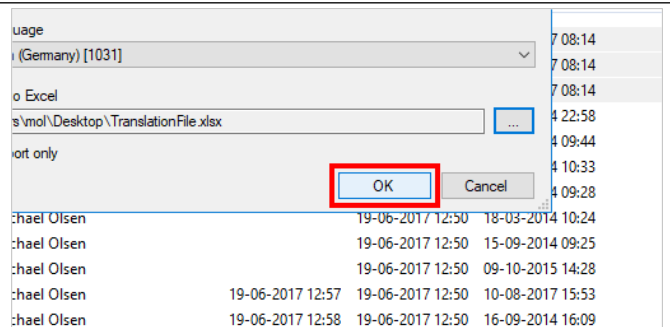
Click on the button **Save**.
You may also press **Alt+S**.



Move the mouse to the checkbox **Export only**.
If you only need to export your current translations for external reviewing, you may checkmark this box.



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



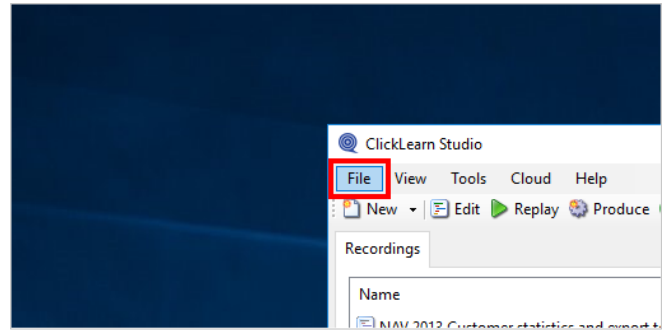
The translation text have now been saved into an Excel document.

8.2.3. Re-import translations from Excel

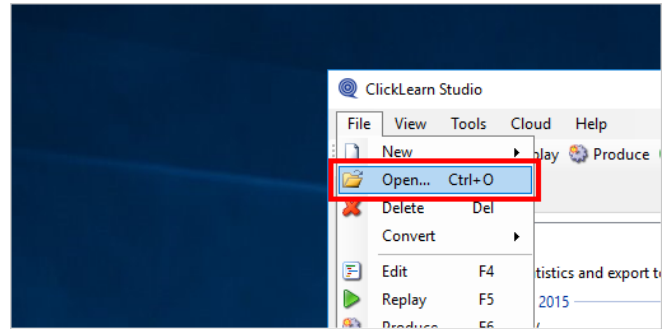
Before re-importing translations into ClickLearn we recommend that you have a copy of all recordings, books and shelves that may be affected.

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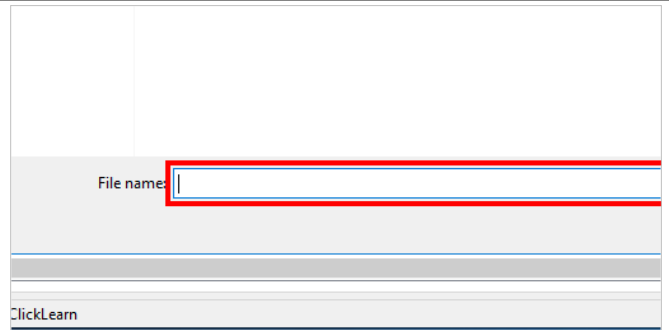
Click on the menu **File**.
You may also press **Alt+F**.



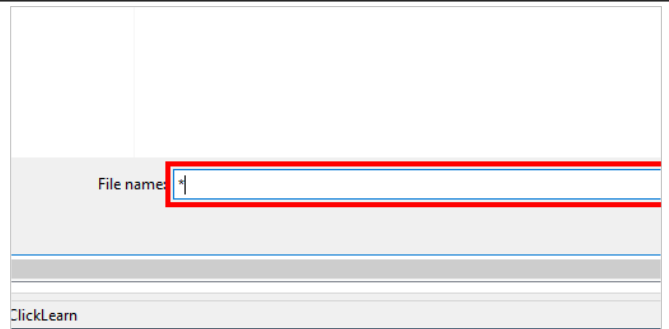
Click on the menu **Open....**



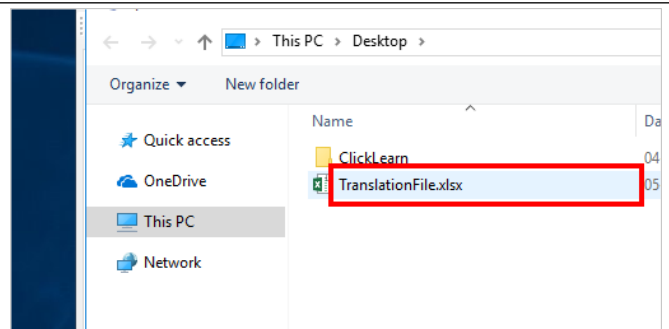
Click on the combo box .
You may also press **Alt+N**.



Enter the text ***xlsx**. Press the **Enter** key.

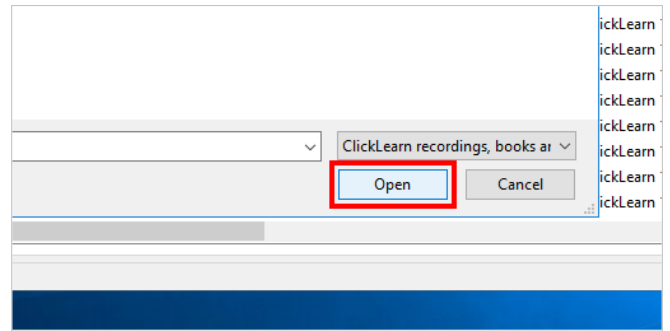


Click on the input field **Name**.



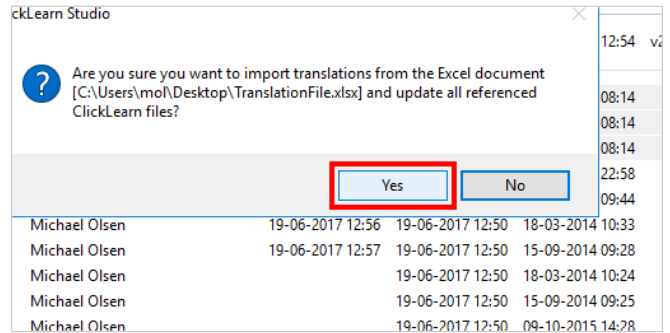
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Click on the button **Open**.
You may also press **Alt+O**.

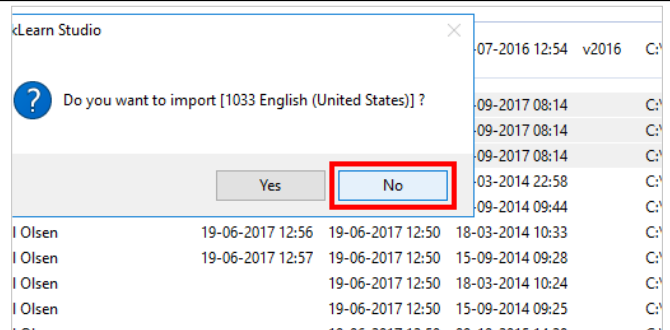


Please pay attention to the questions asked here to ensure that you only import the translations for the languages you need.

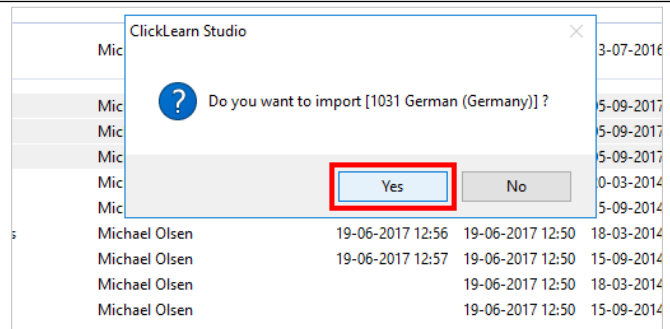
Click on the button **Yes**.
You may also press **Alt+Y**.



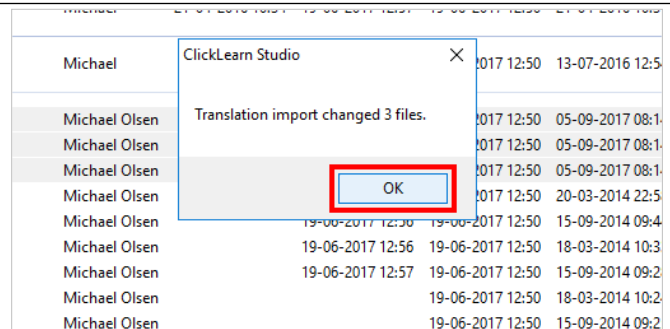
Click on the button **No**.
You may also press **Alt+N**.



Click on the button **Yes**.
You may also press **Alt+Y**.



Click on the button **OK**.

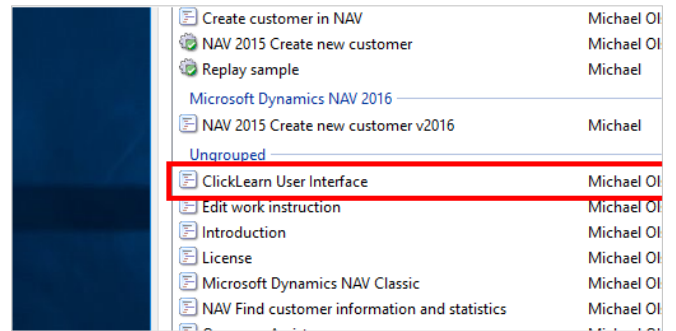


All files have now been updated according to the content in the Excel document.

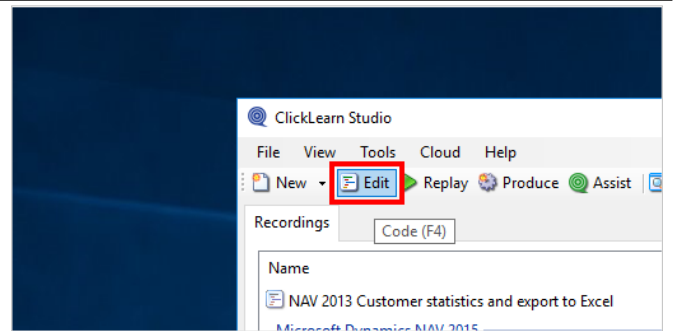
8.2.4. Translation of single steps

In order to translate individual steps you need to edit the recording.

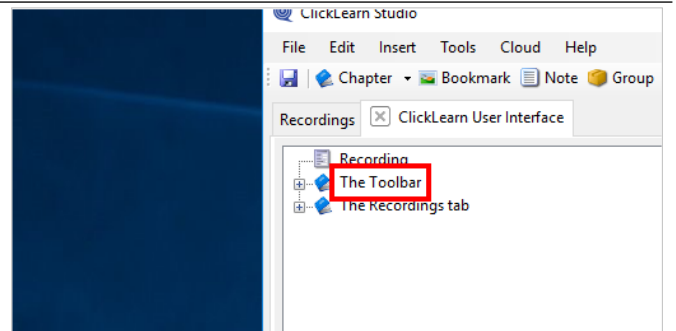
Click on the list element **ClickLearn User Interface**.



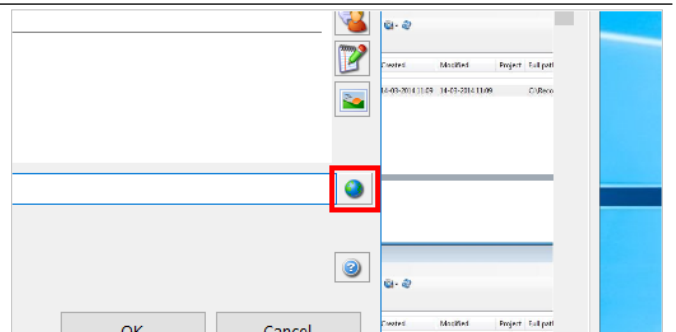
Click on the button **Edit**.
You may also press **Alt+D**.



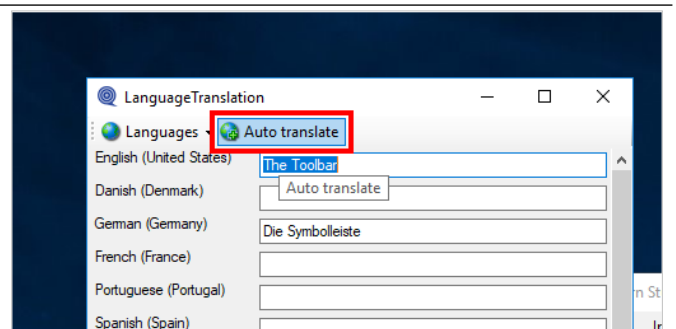
Double click on the step you want to translate.



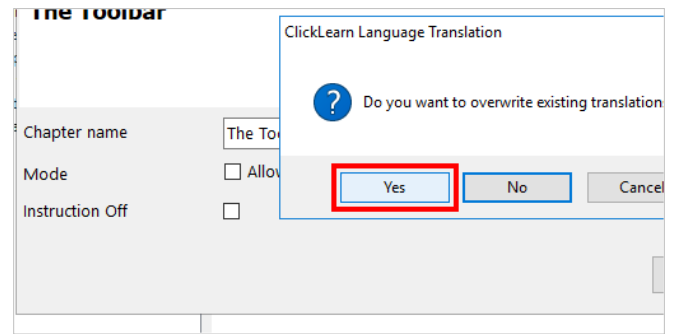
Click on the button **Multiple languages**.



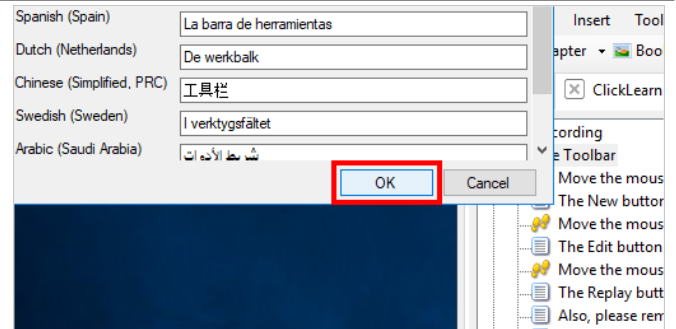
Click on the button **Auto translate**.



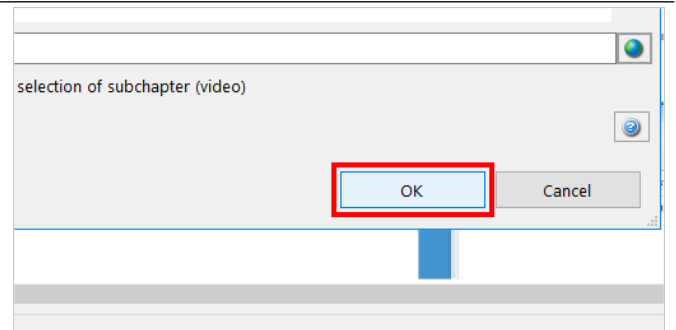
Click on the button **Yes**.
You may also press **Alt+Y**.



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



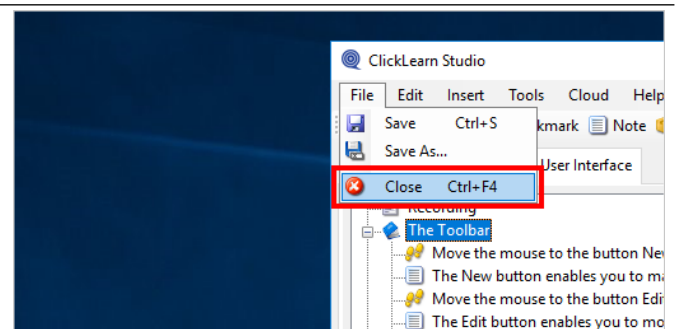
Click on the button **OK**.
You may also press **Alt+O**.



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

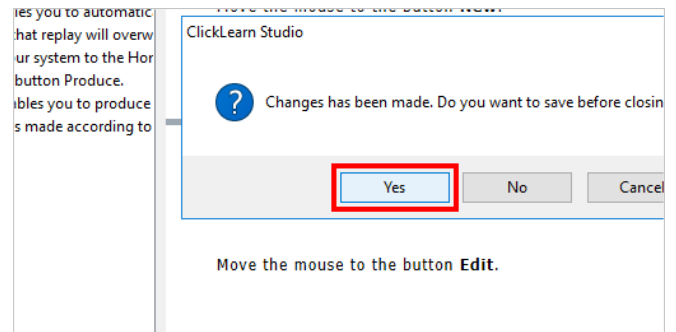


Click on the menu **Close**.



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Click on the button **Yes**.
You may also press **Alt+Y**.



9. Voice and audio

9.1. Text to speech

9.1.1. Local voices

Local installed SAPI compliant voices is supported, and you may set the default voice used for ClickLearn in this module.

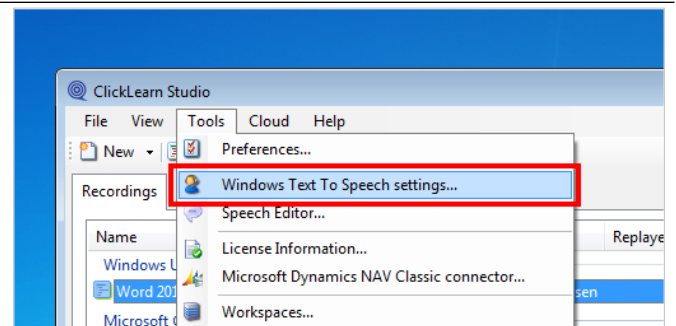
If you are using Windows 8 or newer, it may be required to install the desired language pack, before you have access to a voice.

Please be aware, that Windows voices and other SAPI compliant voices purchased on the internet, may NOT grant you rights to embed the audio in video content. This may apply both internally as for publishing the content online.

Click on the menu **Tools**.

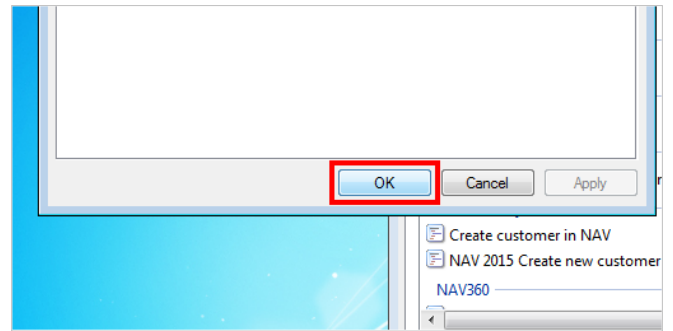


Click on the menu **Windows Text To Speech settings....**



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Click on the button **OK**.



9.1.2. Cloud voices

ClickLearn provides voices via a Cloud solution. These voices are of very high quality and it is ensured that you have rights to produce your video content and publish it anywhere.

Please refer to 'Voice setup' to get started using ClickLearn Cloud voices.

9.2. Voice setup

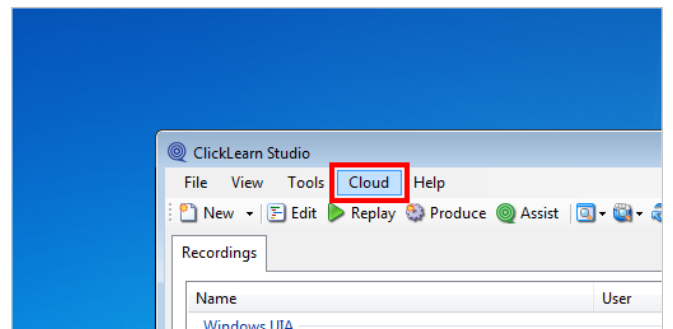
9.2.1. Prerequisite

In order to get access to the ClickLearn Cloud voices you must have a ClickLearn Cloud login.

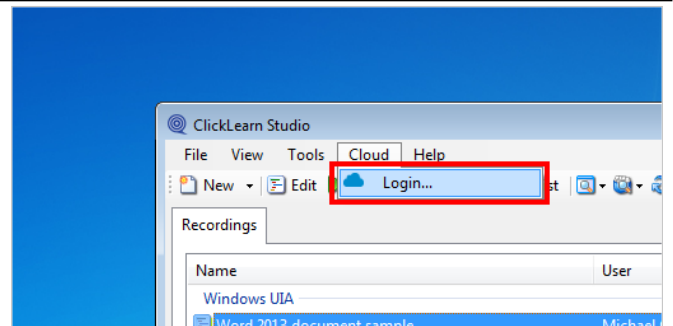
If you do NOT have a login, please contact ClickLearn.

9.2.2. Cloud login

Click on the menu **Cloud**.
You may also press **Alt+C**.

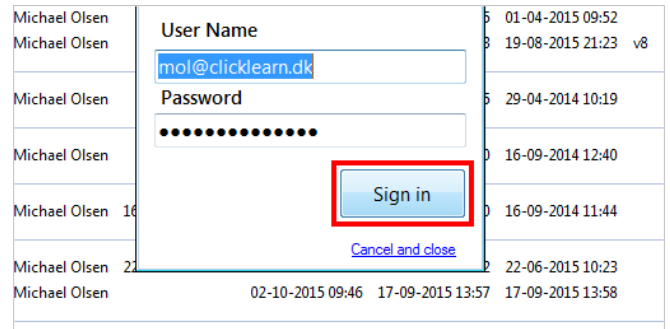


Click on the menu **Login...**



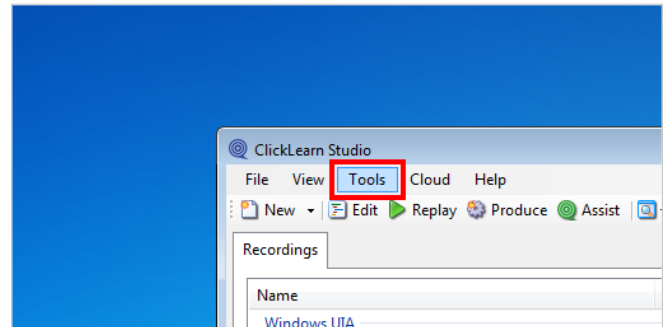
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Click on the button **Sign in**.
You may also press **Alt+S**.

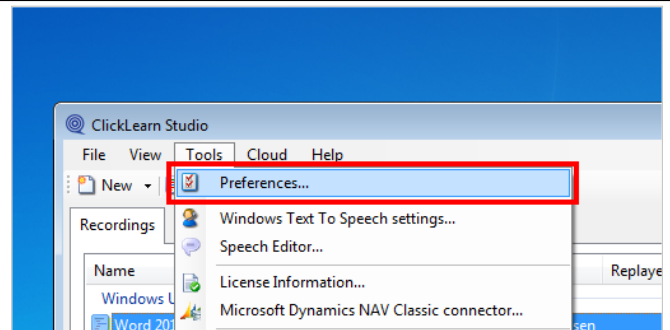


9.2.3. Change the template

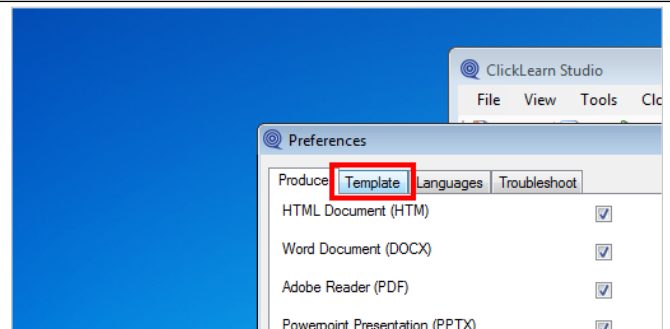
Click on the menu **Tools**.



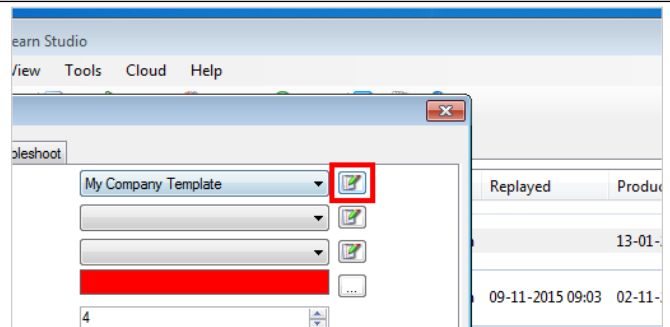
Click on the menu **Preferences...**



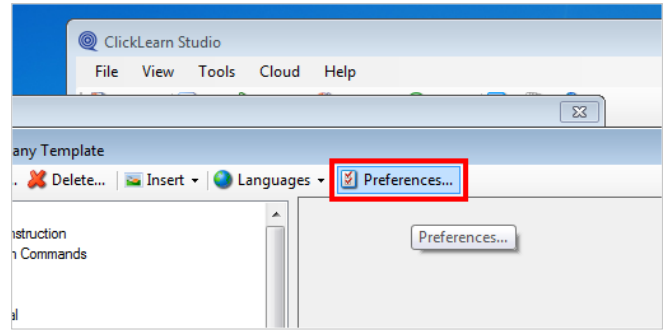
Click on the tab **Template**.



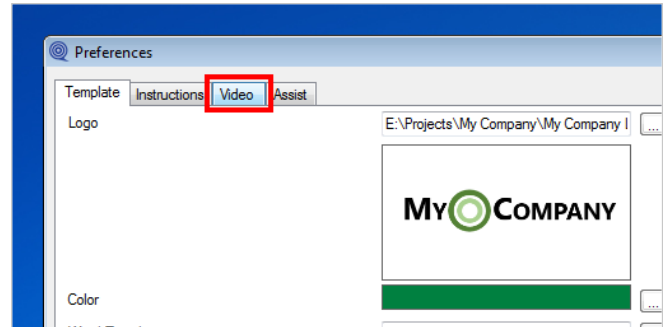
Click on the button **Edit template**.



Click on the button **Preferences....**

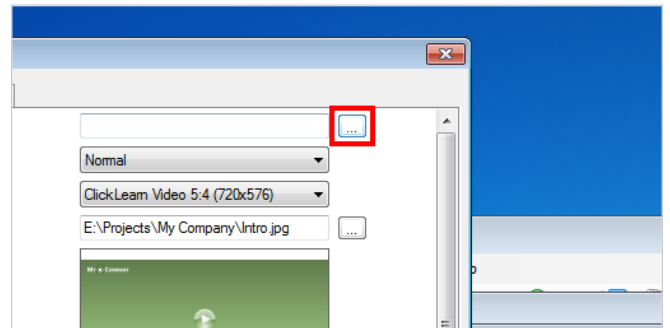


Click on the tab **Video**.



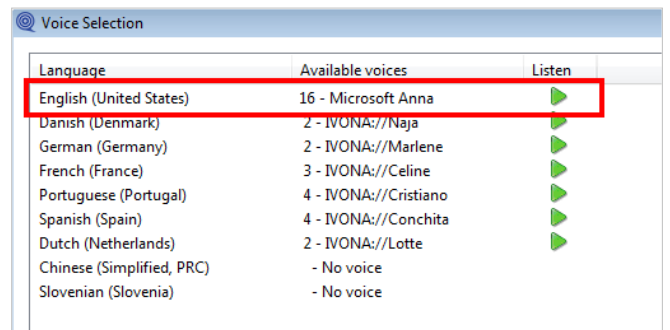
9.2.3.1. Voice selection

Click on the button

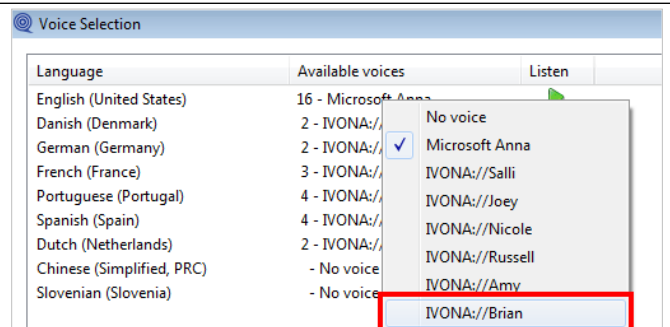


This list will show the available voices for all the languages you have currently setup.

Click in the column Available voices for the desired language.



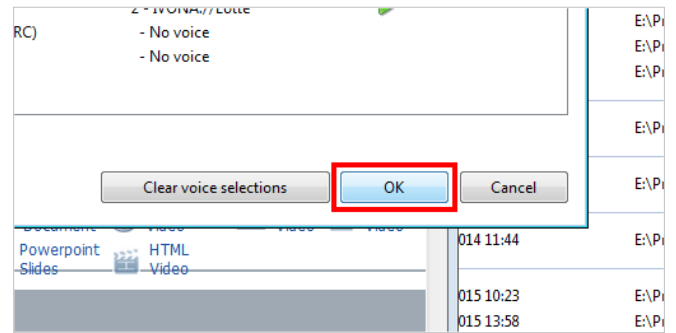
Select the voice you want to use.



If you want to listen to the selected voice, click the play icon in the column Listen.

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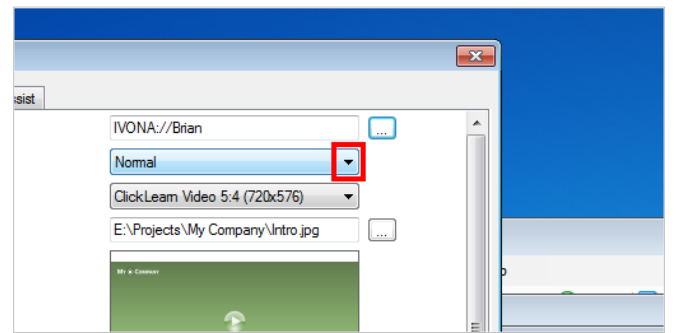
Click on the button **OK**.
You may also press **Alt+O**.



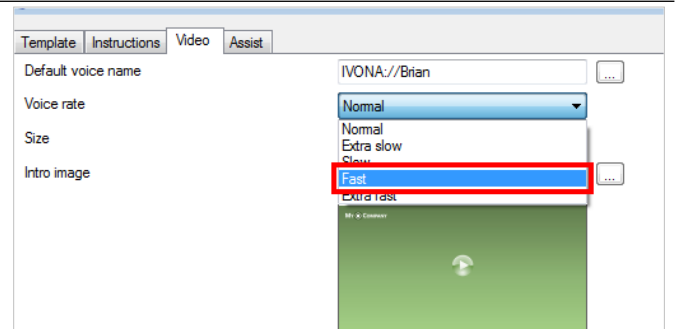
9.2.3.2. Voice rate

It is possible to control how fast the voice should speak.

Click on the button **Voice rate**.
You may also press **Alt+Down Arrow**.

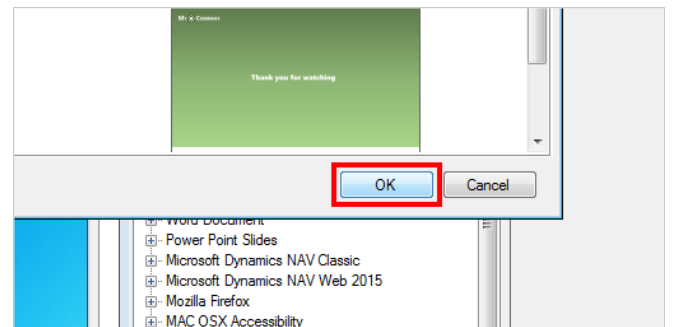


Click on the list element **Fast**.



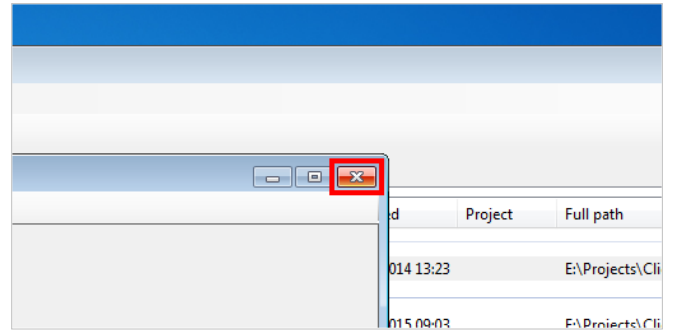
9.2.4. Save the template

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

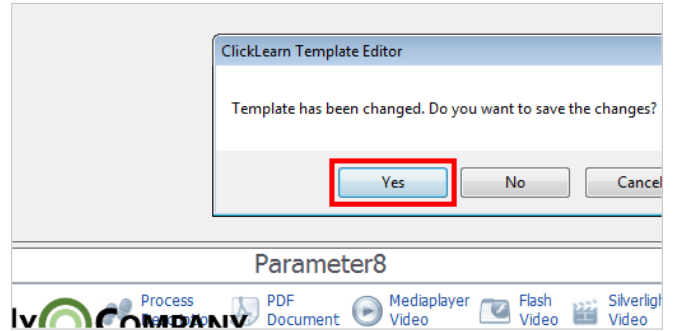


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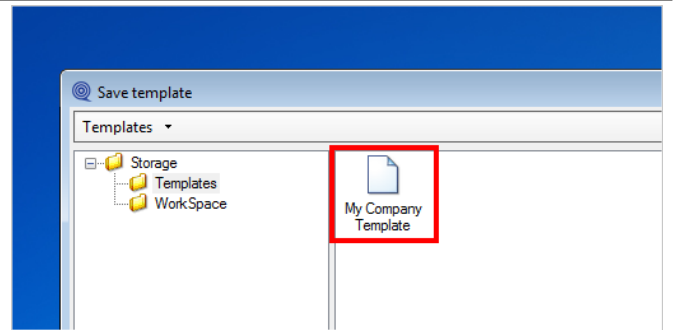
Click on the button **Close**.



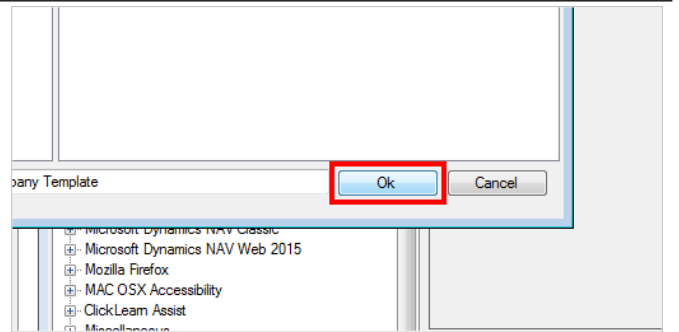
Click on the button **Yes**.
You may also press **Alt+Y**.



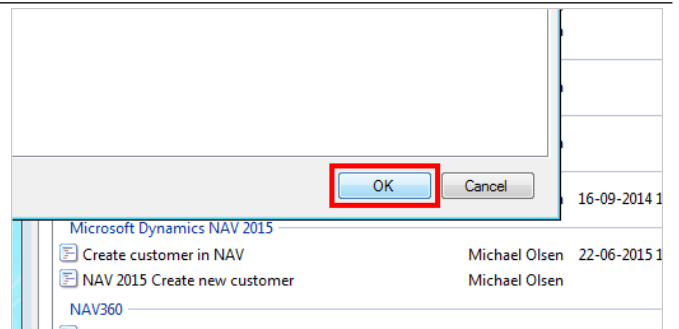
Select your current template or save a new one.



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



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



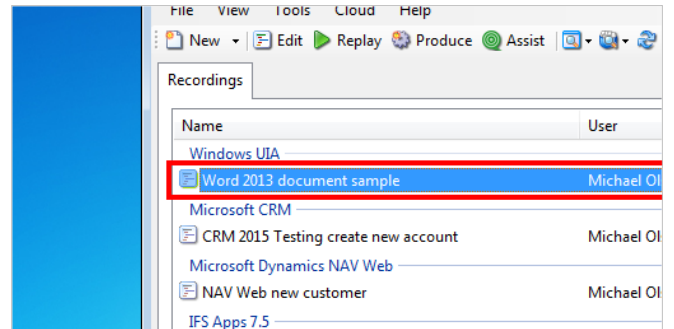
9.3. Voice selection on notes

If you have multiple voices available, it is possible to make different voice selections on notes within a recording.

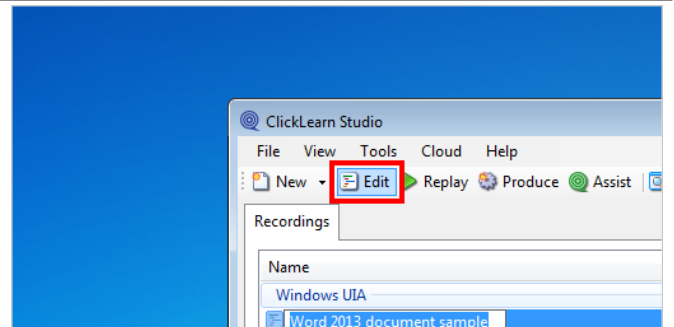
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In this example we will open a recording and add a note, to show how you may select a different voice.

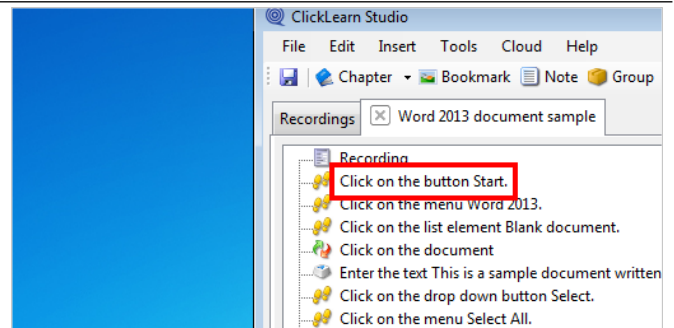
Click on the list element **Word 2013 document sample**.



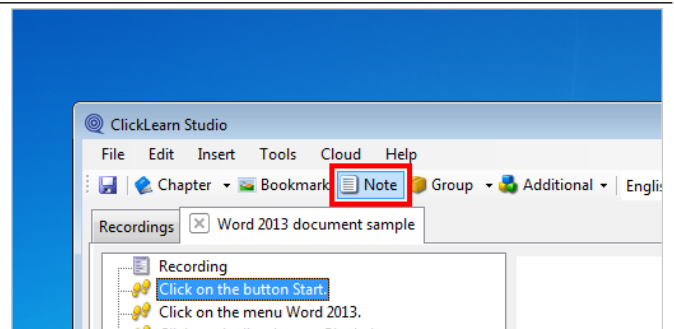
Click on the button **Edit**.
You may also press **Alt+D**.



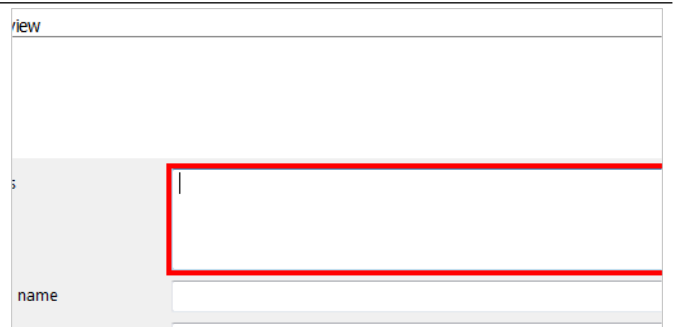
Click on the folder **Click on the button Start..**



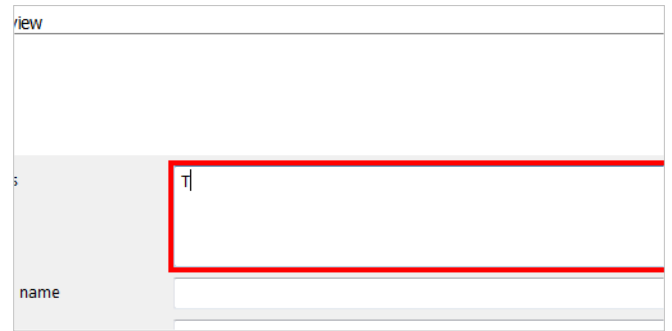
Click on the button **Note**.



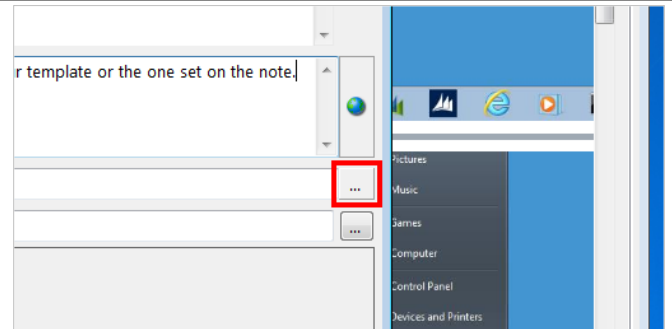
Click on the input field **Notes**.



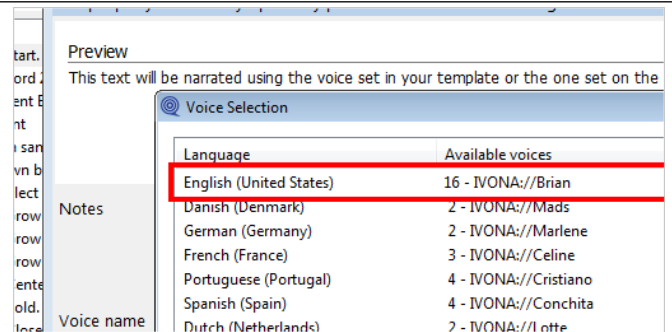
Enter **Notes**.



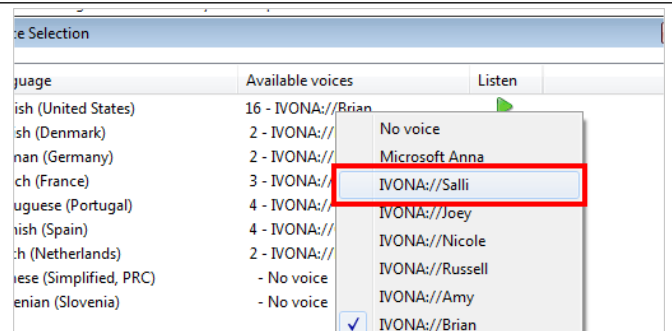
Click on the button



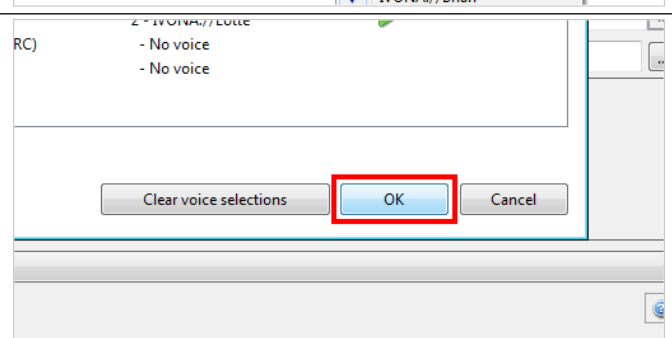
Click on the list element **English (United States)**.



Click on the menu **IVONA://Salli**.

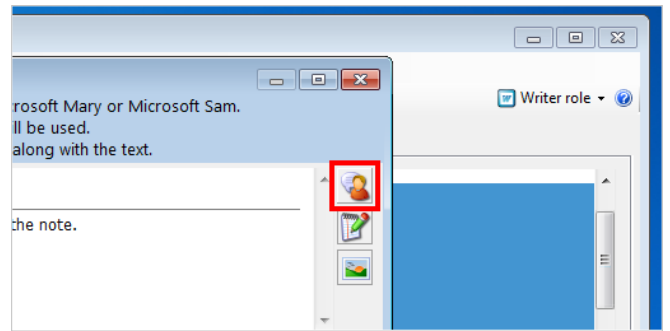


Click on the button **OK**.
You may also press **Alt+O**.



You may now listen to the spoken note using the selected voice.

Click on the button **Text to Speech / Audio**.



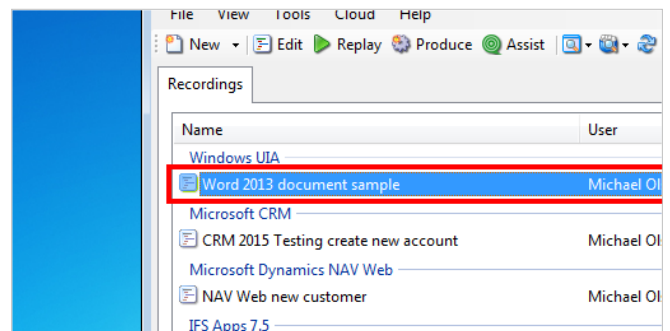
9.4. Voice mixing in different languages

If you have recordings done in one language, and want to produce it in other languages, the instruction text may hold text in multiple languages.

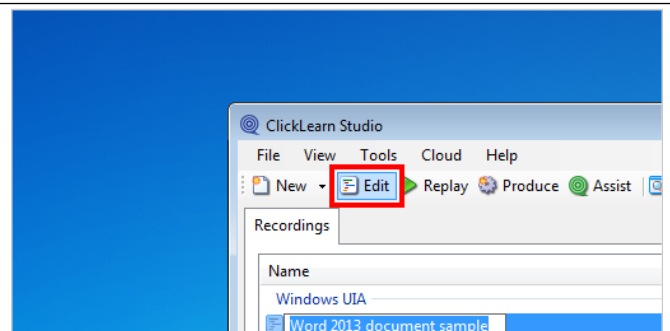
Because an English voice will often have problems pronouncing German or Danish words, ClickLearn will make use of multiple voices to produce the final sentence.

In this example we use an english recording and listen to how ClickLearn will produce the sentence when selecting the German language.

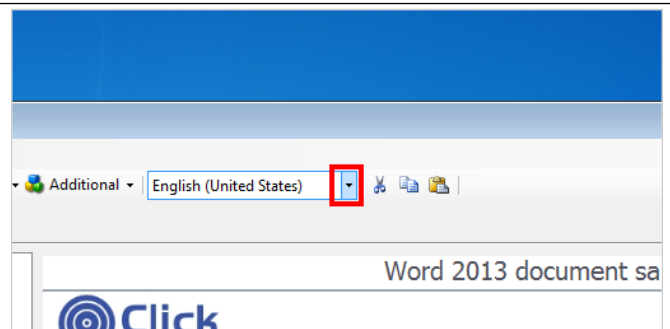
Click on the list element **Word 2013 document sample**.



Click on the button **Edit**.
You may also press **Alt+D**.

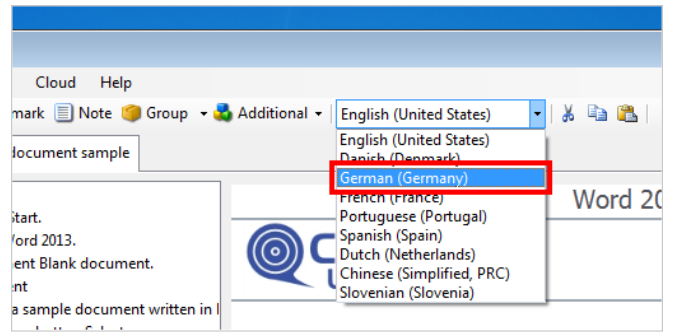


Click on the button **Open**.
You may also press **Alt+Down Arrow**.

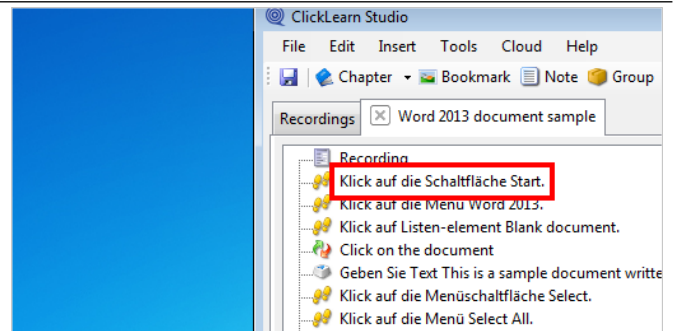


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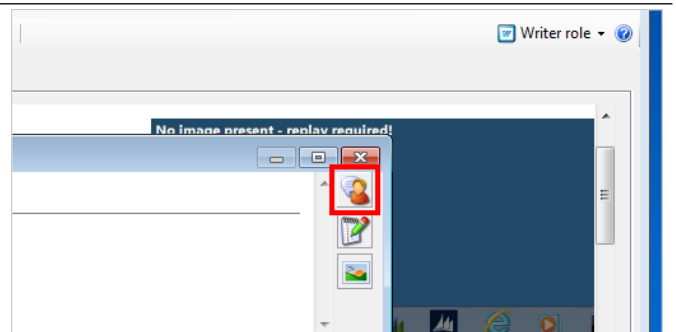
Click on the list element **German (Germany)**.



Double click on the folder **Step**.



Click on the button **Text to Speech / Audio**.



9.5. Speech editor

ClickLearn uses Text to Speech to transform process instructions and notes to narration in your video material.

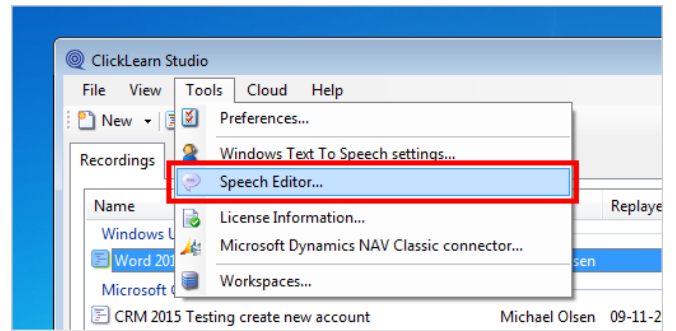
A word or abbreviation may cause mispronunciation. Here you have the ability to manage speech transformations.

For example, the abbreviation 'e.g.' may cause the voice to pronounce it as 'e-dot-g-dot'.

Click on the menu **Tools**.



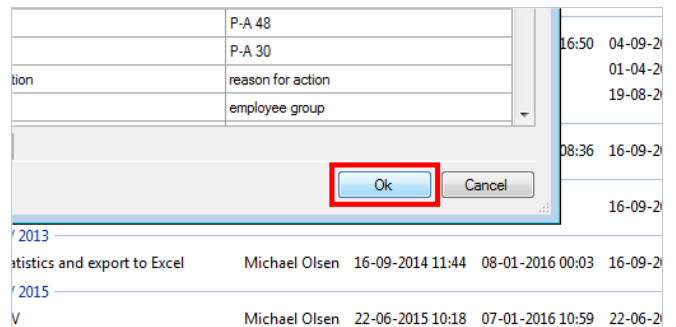
Click on the menu **Speech Editor**....



By adding a row "English (United States), e.g., for example" you may change the pronunciation to 'for example' for all occurrences of 'e.g.'

If you double click a row, ClickLearn will pronounce it using the default Text to Speech voice.

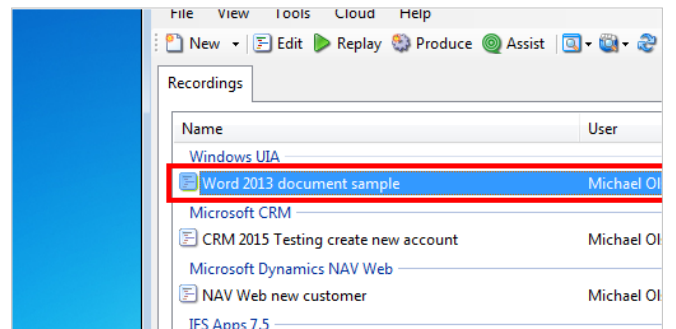
Click on the button **Ok**.
You may also press **Alt+O**.



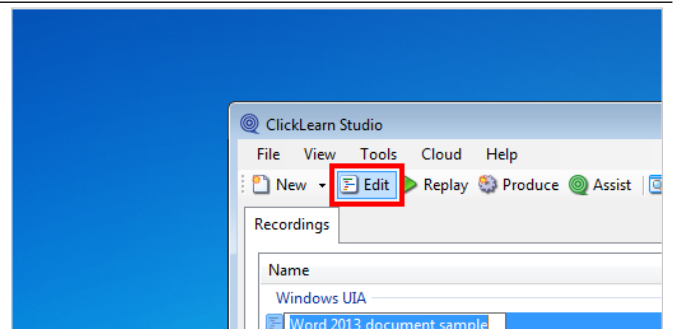
Please note, if your current selected template is stored in a workspace, the customized words will also be stored in the workspace, instead of in the local PC storage.

9.6. Custom audio and narration

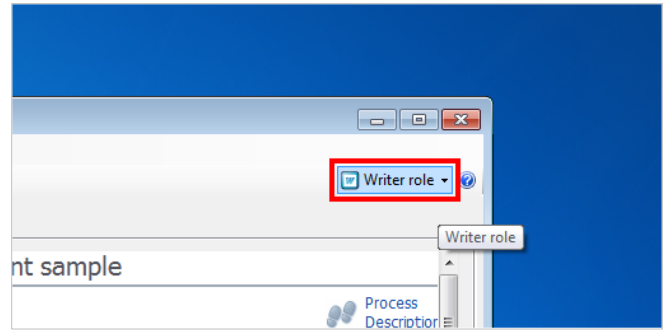
Click on the list element **Word 2013 document sample**.



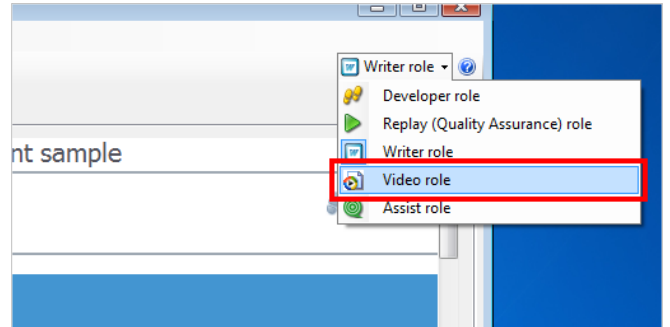
Click on the button **Edit**.
You may also press **Alt+D**.



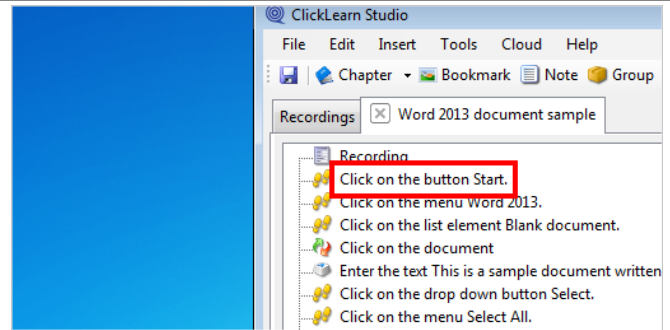
Click on the menu **Writer role**.



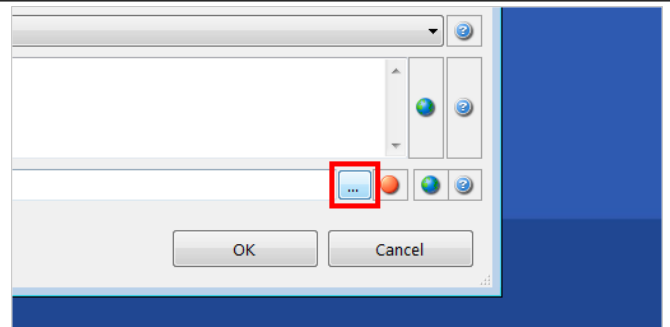
Click on the menu **Video role**.



Double click on the folder **Step**.

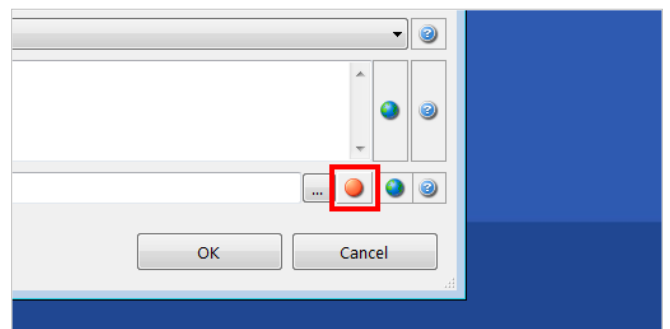


You may open a sound file in here. The format has to be WAV or MP3.

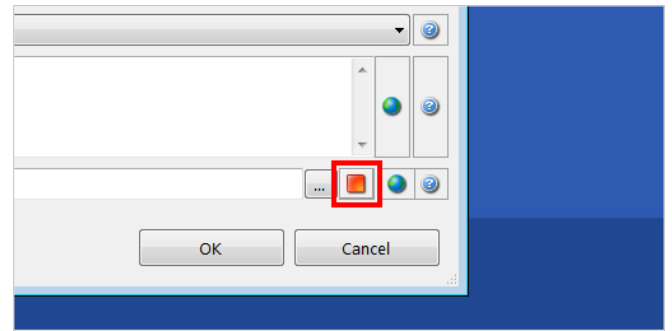


9.6.1. Record using the microphone

Click on the button **Record**.

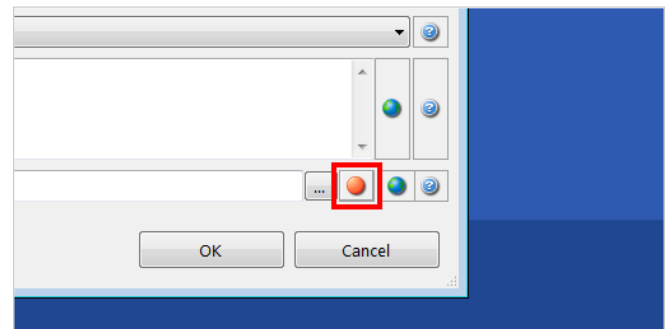


Click on the button **Stop**.

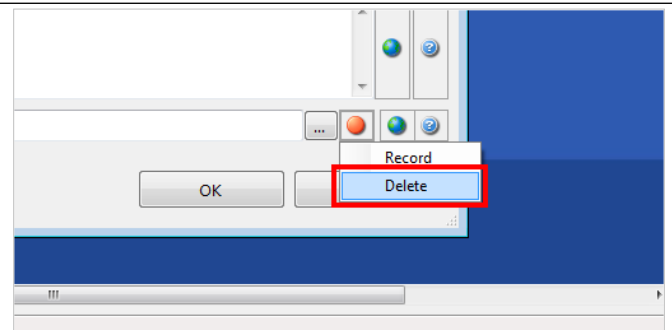


9.6.1.1. Delete narration recorded with the microphone

Click on the button **Record**.



Click on the menu **Delete**.



10. Replay

10.1.Replay introduction

10.1.1. Introduction

ClickLearn is capable of automatically updating your documentation and training materials when changes are made to your business systems.

Even though the replay feature is a simple click of a button, it is important that you understand the prerequisites for using it.

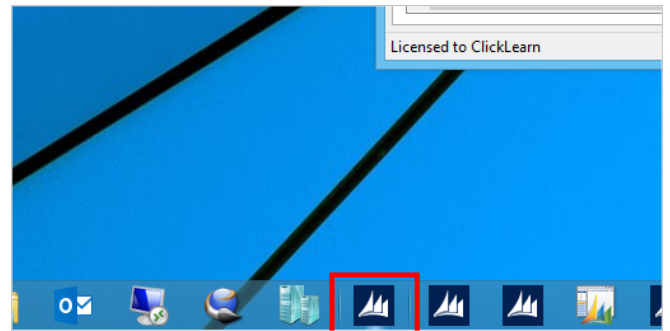
Most importantly, it is required that you have started the same application used as when you made the recording.

10.1.2. Preparing for the replay

First, start the required application.

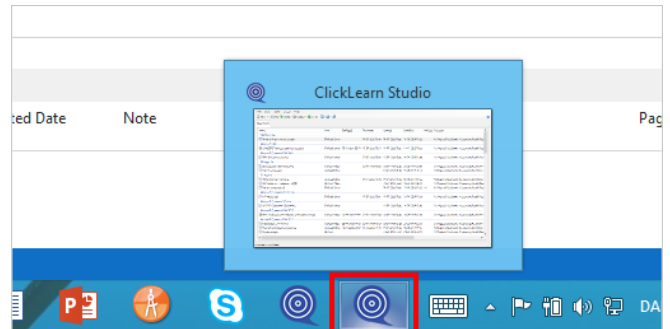
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Click on the button **NAV 2015 English**.

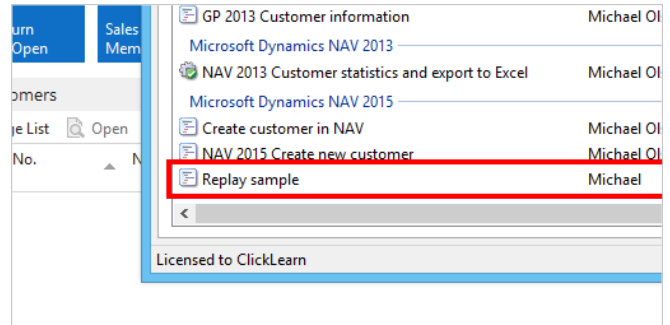


Then, activate ClickLearn and select the recording to replay.

Click on the button **ClickLearn Studio**.



Click on the list element **Replay sample**.



10.1.3. Important information

ClickLearn can only replay if your display is 96 DPI (scale = 100%).

It only records the content of your primary screen.

The current screen content of your recording will be reset and re-captured during the replay.

DO NOT TOUCH the keyboard and mouse. ClickLearn will control both itself.

WAIT until completely finished, e.g. until ClickLearn becomes visible again or an error message appears.

If required to stop the replay you need to press the two Ctrl keys at the same time.

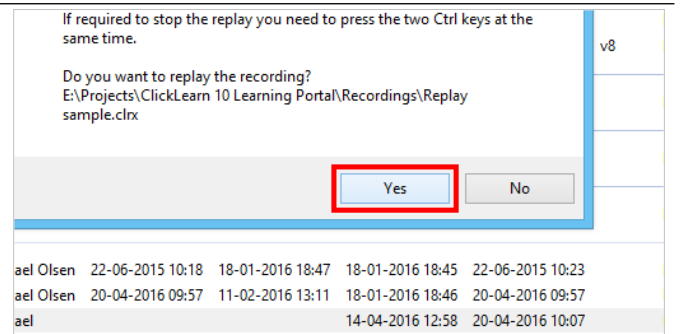
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10.1.4. Replay

Click on the button **Replay**.
You may also press **Alt+R**.

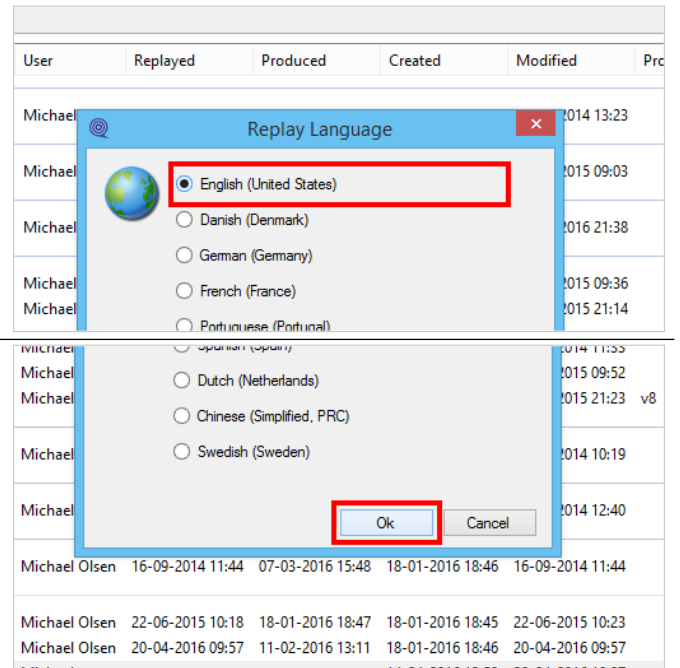


Click on the button **Yes**.
You may also press **Alt+Y**.



Make sure to select the correct language, as it is possible to replay the same recording back on different language versions of your application.

Click on the radio button **English (United States)**.

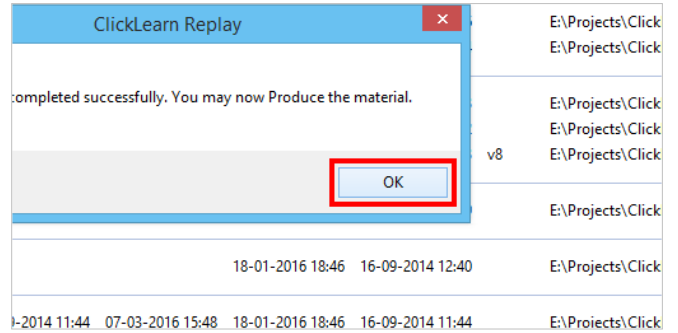


Click on the button **Ok**.
You may also press **Alt+O**.

The replay is now running and ClickLearn is hidden.

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Click on the button **OK**.



When the replay has completed remember to produce the material.

10.1.5. Important next lessons

Although it can be easy to replay a recording, several things may lead to replay failure.

Please make sure to study all of the content in the Replay book and learn how to handle the most common causes for replay failure.

10.2.Replay in a different language

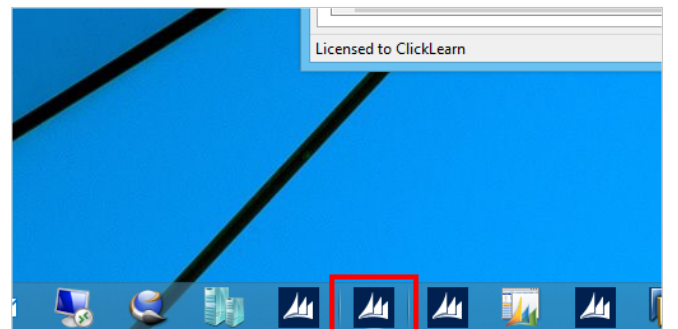
10.2.1. Introduction

ClickLearn is able to convert your recordings to any language of choice.

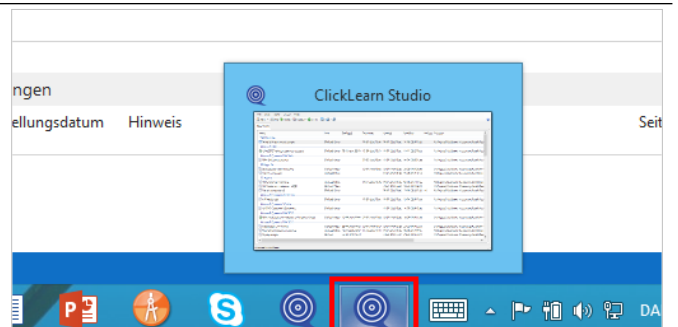
You may record in an English system and play that recording back on for example a German system and translate your documentation, either to a new language, a differently regionalized system or both.

10.2.2. Prepare for the replay

Click on the button **NAV 2015 Deutsch**.

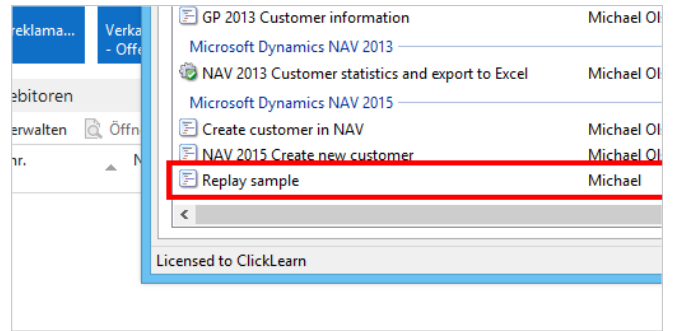


Click on the button **ClickLearn Studio**.



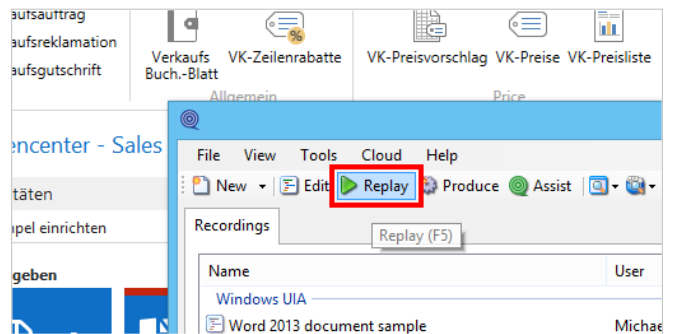
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Click on the list element **Replay sample**.

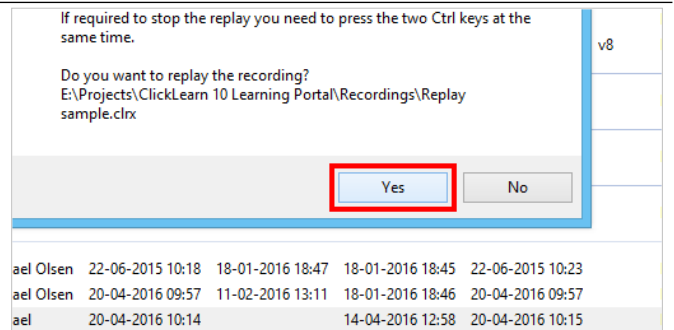


10.2.3. Replay

Click on the button **Replay**.
You may also press **Alt+R**.



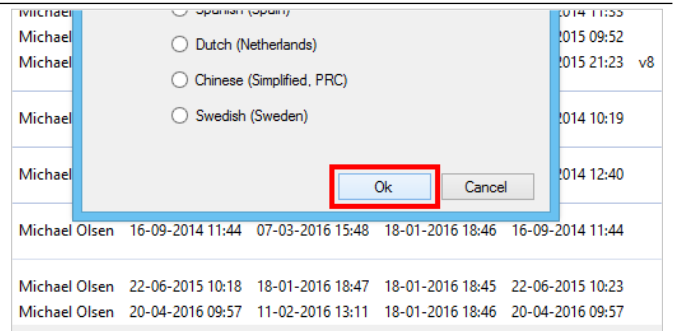
Click on the button **Yes**.
You may also press **Alt+Y**.



Click on the radio button **German (Germany)**.

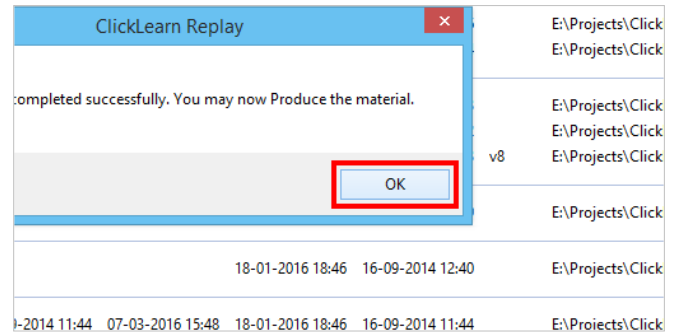


Click on the button **Ok**.
You may also press **Alt+O**.



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Click on the button **OK**.



The recording has now successfully been replayed on a German system and you may produce the material in both English and German.

10.3.Replay failing instantly

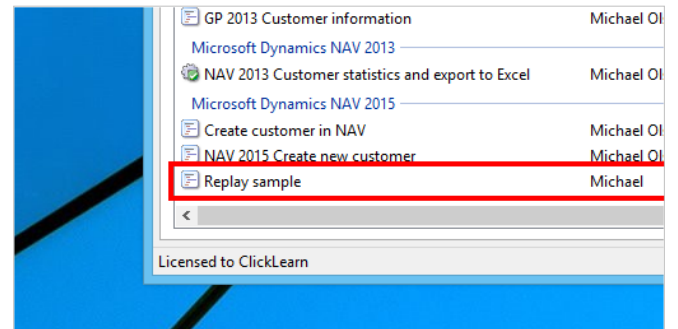
10.3.1. Introduction

The most common reason for the replay to fail, is when the application has not even been started.

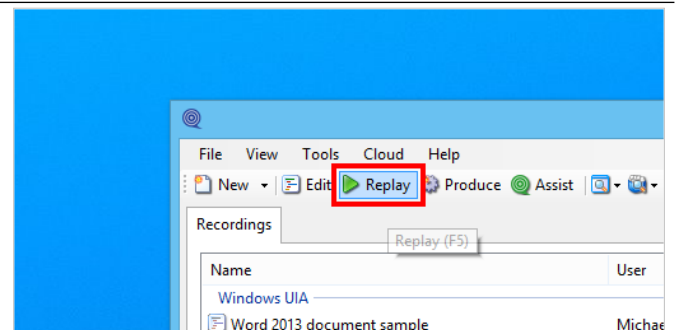
In this sample, we will intentionally forget to start the application and try to perform the replay.

10.3.2. Replay

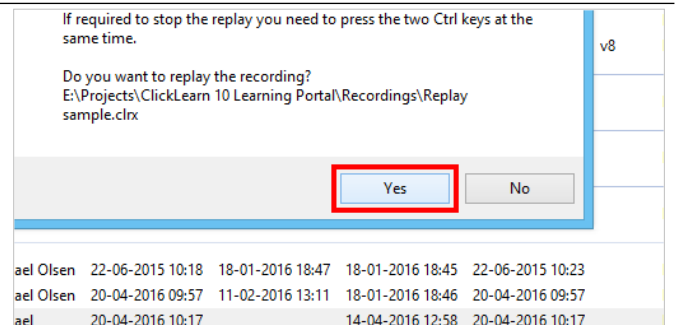
Click on the list element **Replay sample**.



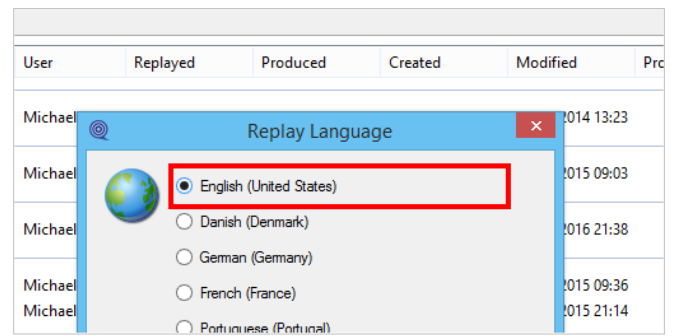
Click on the button **Replay**.
You may also press **Alt+R**.



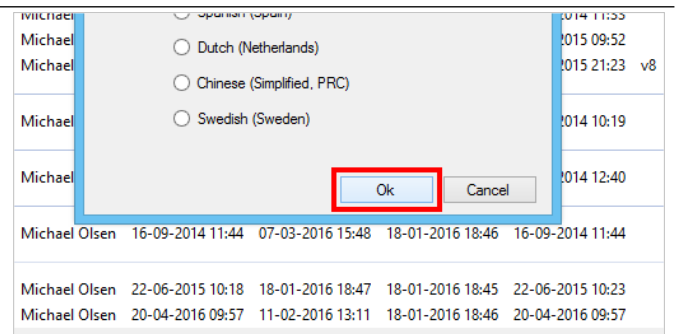
Click on the button **Yes**.
You may also press **Alt+Y**.



Click on the radio button **English (United States)**.



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



If the replay cannot locate the item on screen it fails.

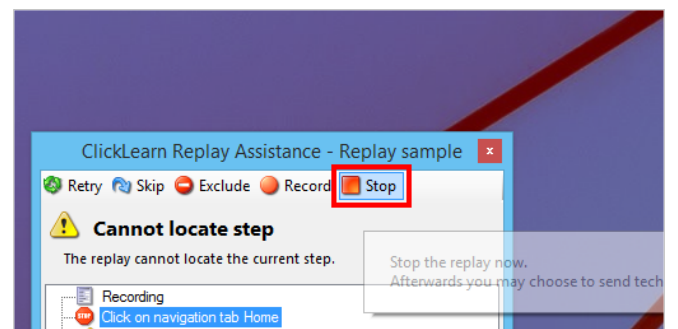
It will dim your desktop and display ClickLearn Replay Assistance window.

We will describe this window in details in 'Replay failure when no data present'.

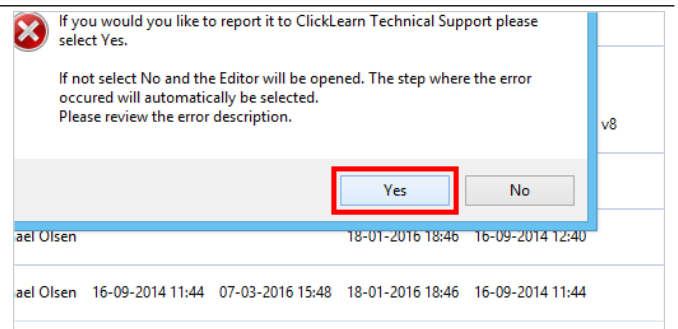
Here we will simply stop the replay and send a technical support case to ClickLearn.

The ClickLearn support team will be able to review the recording and analyze why the replay failed. This way ClickLearn may help you understand, what is required for the replay to work.

Click on the button **Stop**.

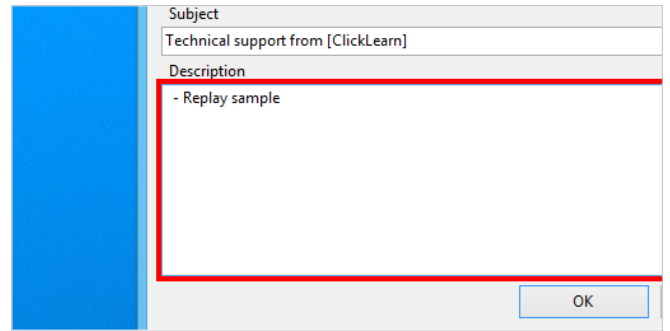


Click on the button **Yes**.
You may also press **Alt+Y**.



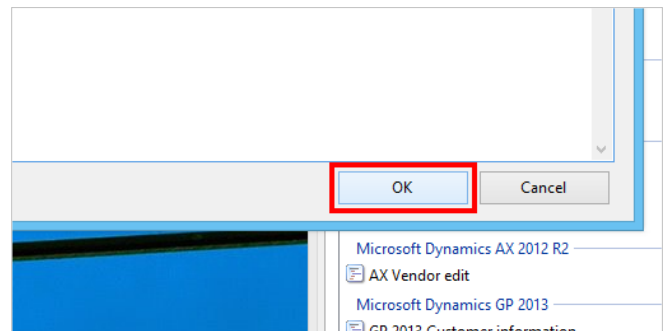
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Click on the input field **Description**.



Please add your own notes as to why you need help with the failed replay.

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



Once the ClickLearn Support Team has analyzed your support case, you will receive an email.

10.4.Replay failing when data not present

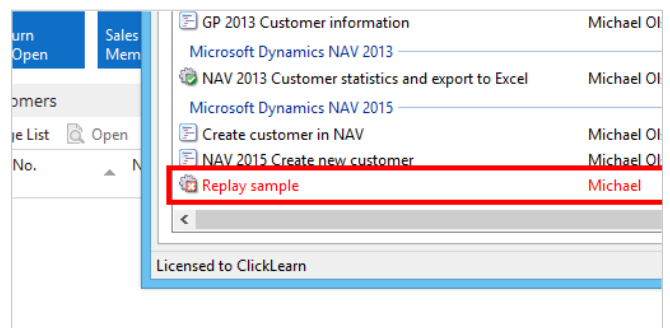
10.4.1. Introduction

A common reason for replay failure is when data has changed in your application.

In this example we have deleted the customer C00860 from the system. This is the customer we selected when recording the work instruction on how to edit a customer.

10.4.2. Replay

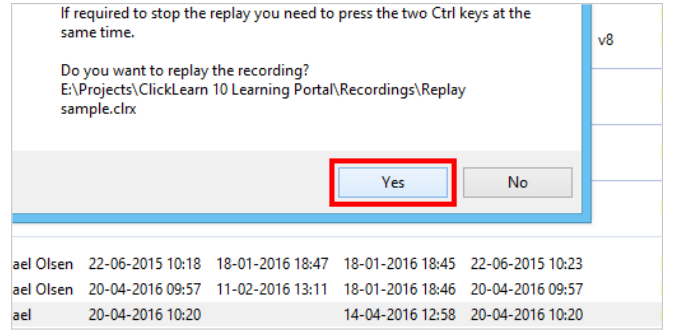
Click on the list element **Replay sample**.



Click on the button **Replay**.
You may also press **Alt+R**.



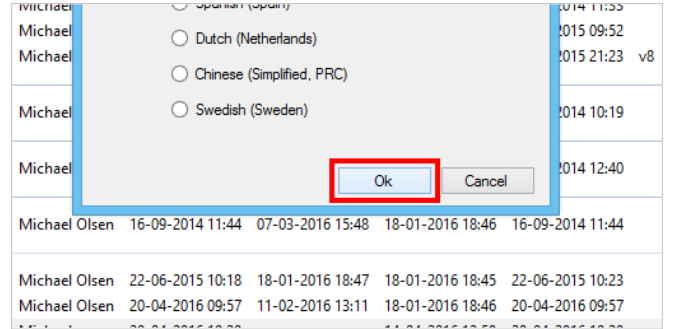
Click on the button **Yes**.
You may also press **Alt+Y**.



Click on the radio button **English (United States)**.



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



The replay worked flawless for the first two steps in our recording, but is now failing because it cannot locate the data row with the customer C00860.

So the questions is, what to do now?

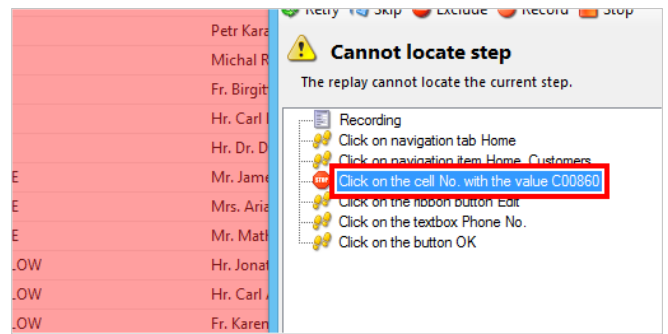
10.4.3. ClickLearn Replay Assistance

The ClickLearn Click-and-continue technology allows you to make changes to your recordings as it is being played back on your live system.

We will start by explaining the actions available in this window.

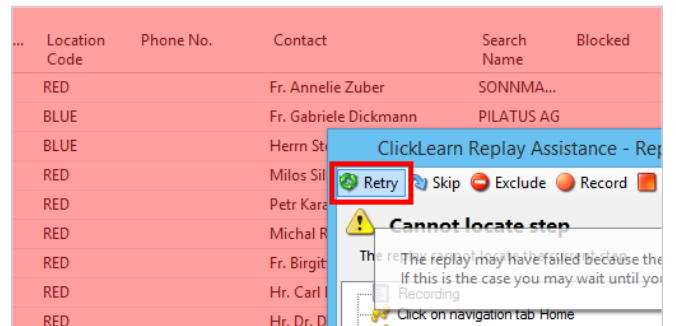
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Move the mouse to the folder **Click** on the cell **No.** with the value **C00860**.



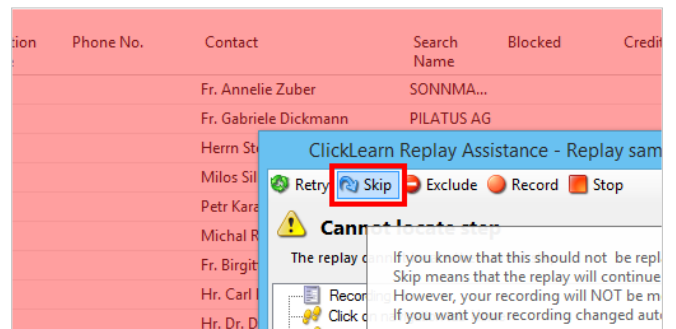
The selected node with the stop icon to the left is the step that failed. It should give you an idea of what the problem is.

Move the mouse to the button **Retry**.



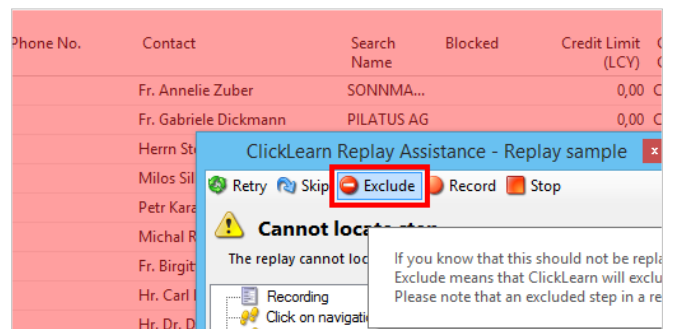
The replay may have failed because the system is busy and the item is not yet visible. If this is the case you may wait until you can see the item on the screen and then click on this button.

Move the mouse to the button **Skip**.



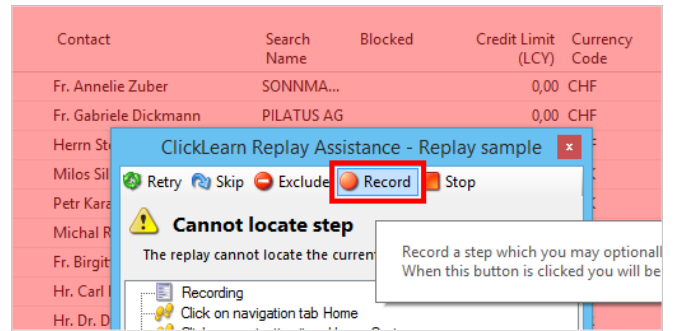
If you know that this should not be replayed please consider if you should skip it. Skip means that the replay will continue with the next step. However, your recording will NOT be modified but is left for you to do manually in the ClickLearn Studio. If you want your recording changed automatically by ClickLearn please look at the button Exclude or Record to Replace.

Move the mouse to the button **Exclude**.



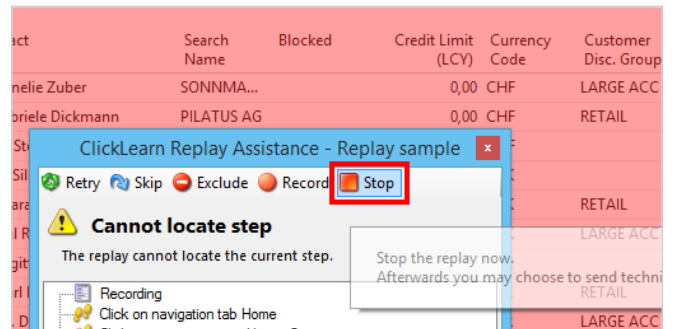
If you know that this should not be replayed please consider if you should exclude it. Exclude means that ClickLearn will exclude this step in your recording. Please note that an excluded step in a recording may be included yet again in the ClickLearn Studio.

Move the mouse to the button **Record**.



Record a step which you may optionally use to replace the one that failed or add before this step is replayed. When this button is clicked you will be allowed to click on an item and then select what to do with it.

Move the mouse to the button **Stop**.

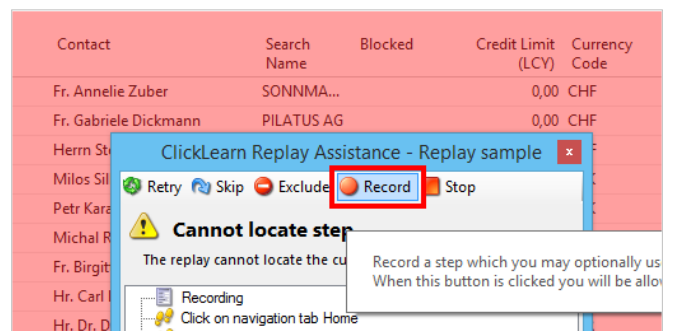


Stop the replay now. Afterwards you may choose to send technical support, review the recording and analyse the error information.

10.4.4. Recording due to changes

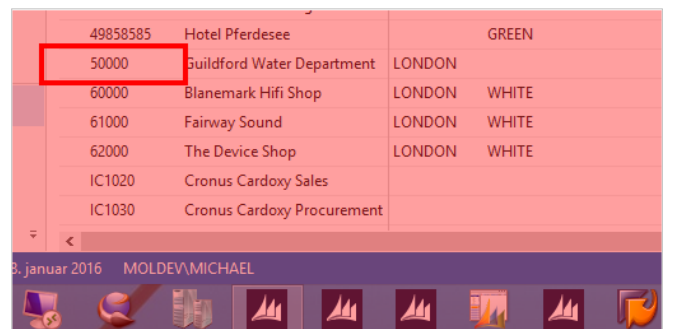
Assuming that you know the reason is that the customer has been deleted and just want to use another, the record action may be used.

Click on the button **Record**.



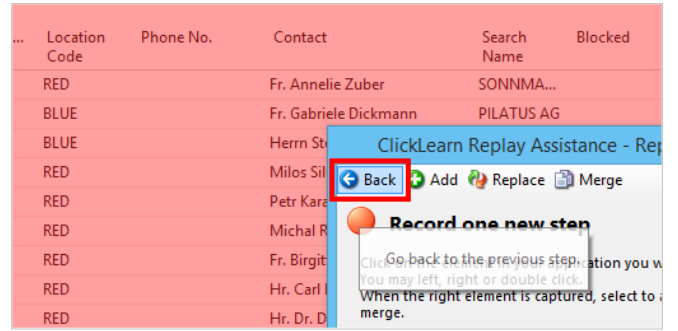
Now any element within your application may be recorded by clicking on it though the dimmed screen.

Click on **the element you want to record**.



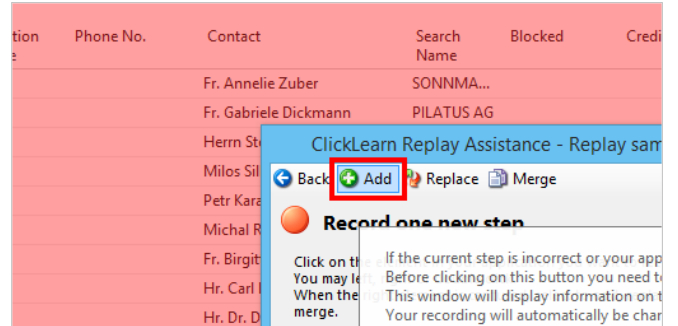
Once the element has been selected you may select from the following actions.

Move the mouse to the button **Back**.



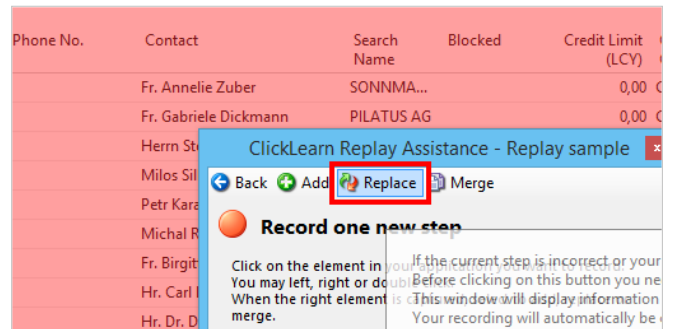
Go back to the previous step.

Move the mouse to the button **Add**.



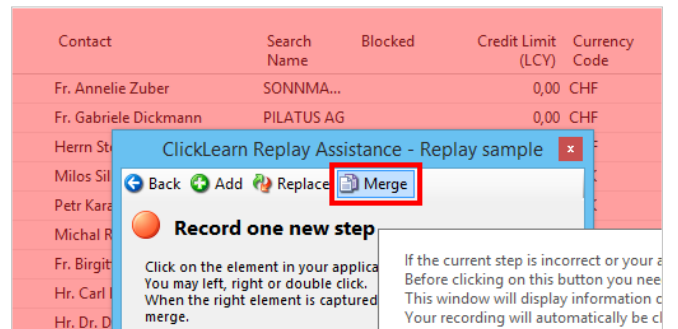
If the current step is incorrect or your application has changed you may need to add a new step. Before clicking on this button you need to click on a new item that should be added before the current one. This window will display information on the item you click on so that you may verify the properties and screen location before adding. Your recording will automatically be changed by ClickLearn by adding the new step before the current step.

Move the mouse to the button **Replace**.



If the current step is incorrect or your application has changed you may need to replace this step. Before clicking on this button you need to click on a new item that should replace the current one. This window will display information on the item you click on so that you may verify the properties and screen location before replacing. Your recording will automatically be changed by ClickLearn by excluding the current step and inserting the new step.

Move the mouse to the button **Merge**.



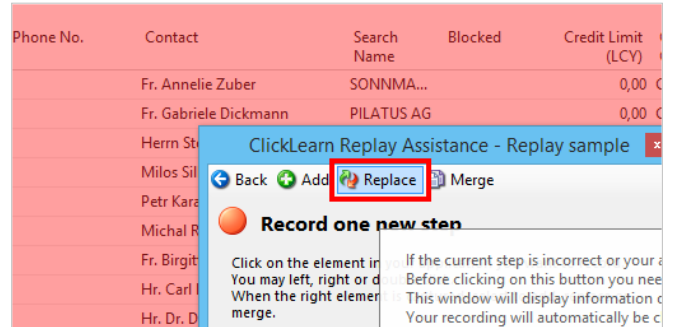
If the current step is incorrect or your application has changed you may need to replace this step. Before clicking on this button you need to click on a new item that should replace the current one. This window will

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display information on the item you click on so that you may verify the properties and screen location before replacing. Your recording will automatically be changed by ClickLearn by excluding the current step and merging it to a new step.

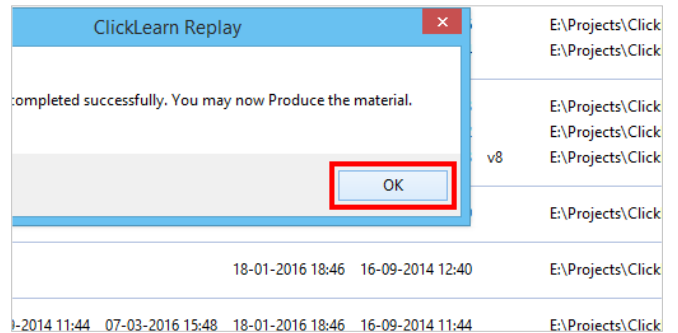
10.4.5. Replace the step that failed

Click on the button **Replace**.



Once the step has been replaced, the replay will perform this step instead and continue with the rest of the steps in your recording.

Click on the button **OK**.



10.5.Replay failing due to incorrect changes in recording

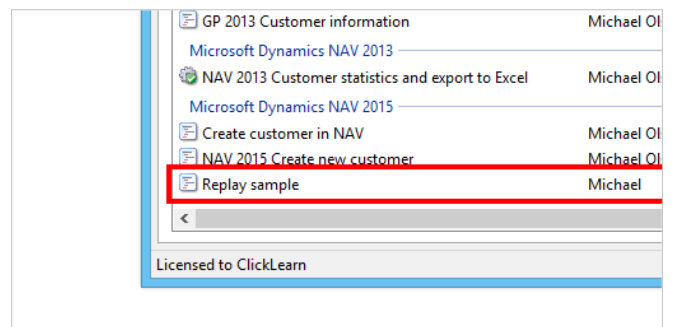
10.5.1. Introduction

A reason for replay failure is due to the fact what many writers does not consider the impact of removing steps from the original recording.

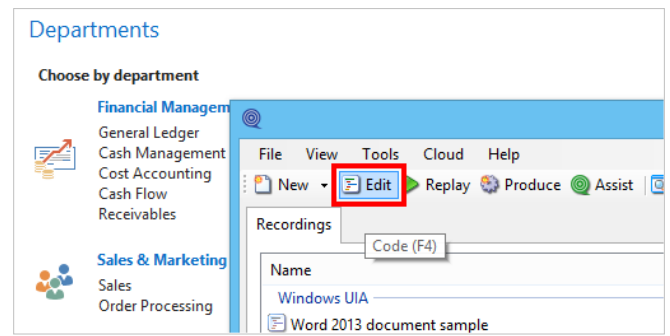
Some steps might be seen as unwanted in the written instructions, and not important for the video content, and the author therefore decides to delete or exclude them.

10.5.2. Author removing steps

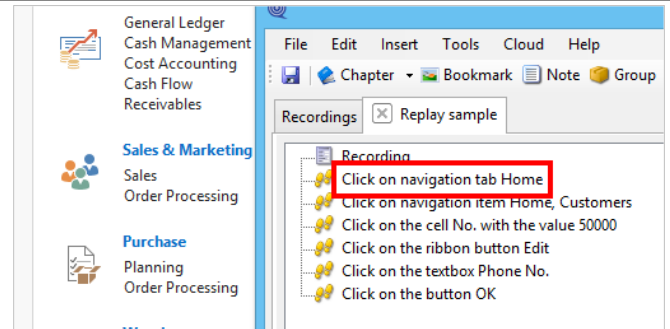
Click on the list element **Replay sample**.



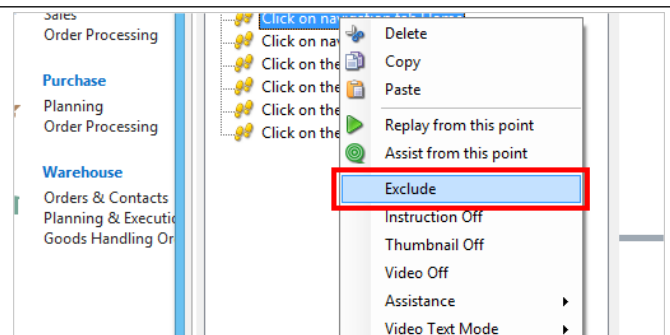
Click on the button **Edit**.
You may also press **Alt+D**.



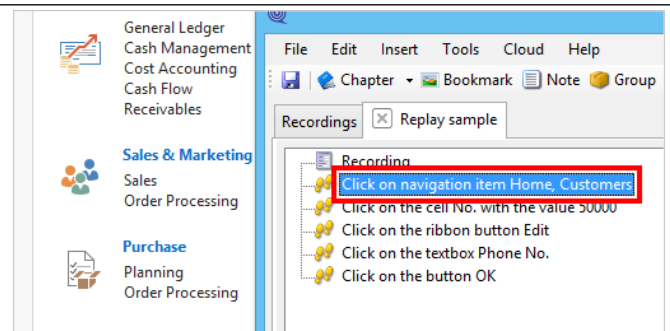
Right click on the folder **Click on navigation tab Home**.



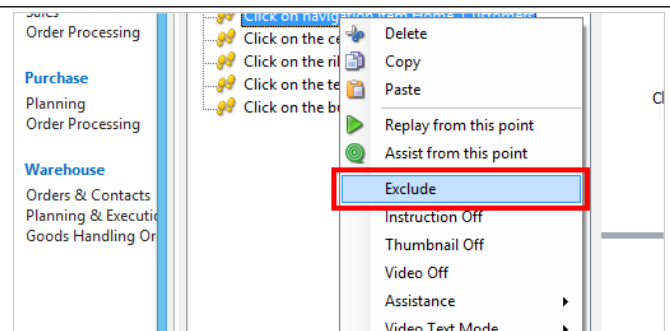
Click on the menu **Exclude**.



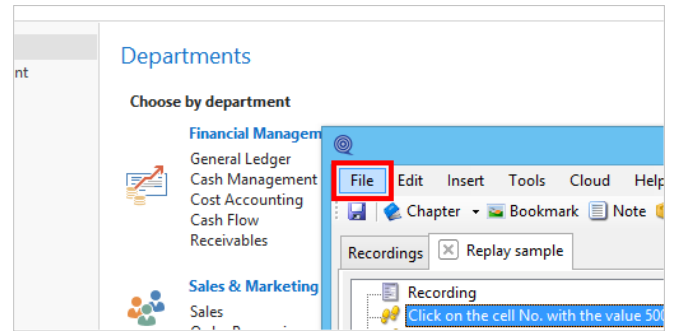
Right click on the folder **Click on navigation item Home, Customers**.



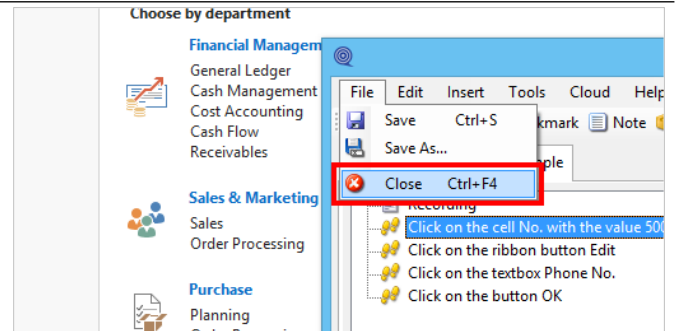
Click on the menu **Exclude**.



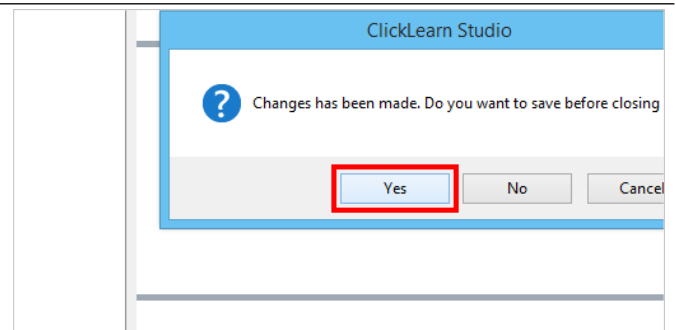
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

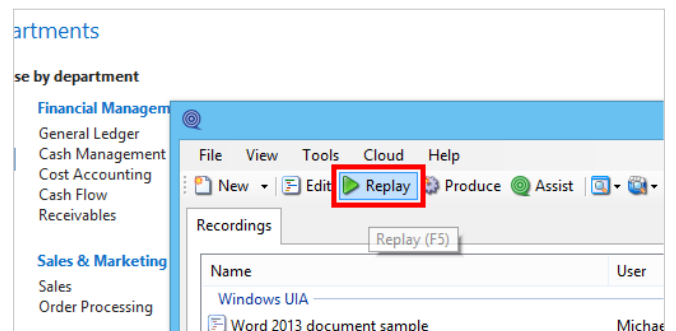


Click on the button **Yes**.
You may also press **Alt+Y**.

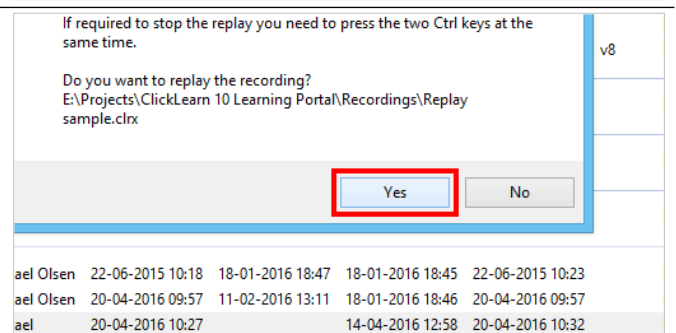


10.5.3. Replay failure

Click on the button **Replay**.
You may also press **Alt+R**.



Click on the button **Yes**.
You may also press **Alt+Y**.

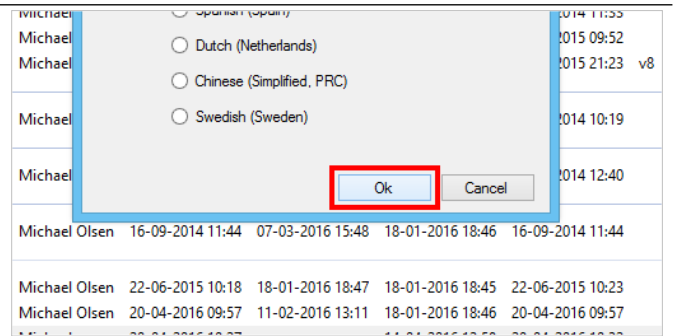


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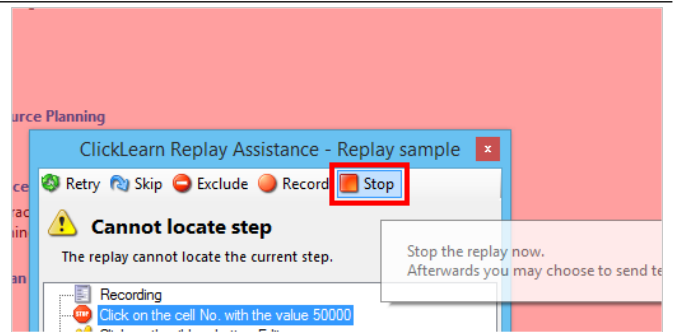
Click on the radio button **English (United States)**.



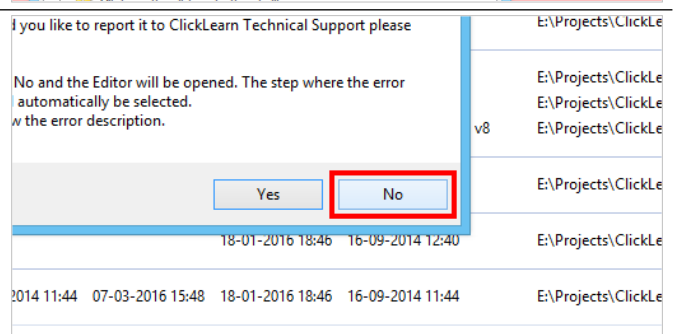
Click on the button **Ok**.
You may also press **Alt+O**.



Click on the button **Stop**.



Click on the button **No**.
You may also press **Alt+N**.

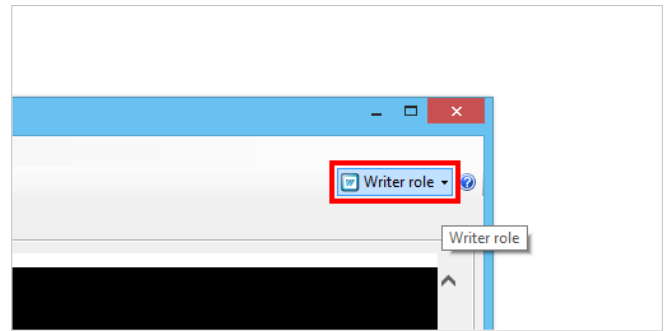


10.5.4. The Replay role

The replay role in the editor gives meaningful information to the QA role, which is very different from the role as a writer.

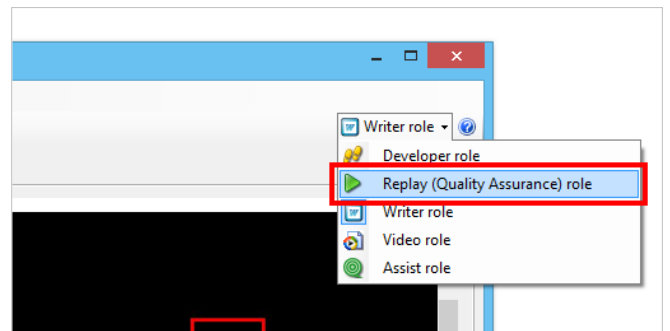
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Click on the menu **Writer role**.

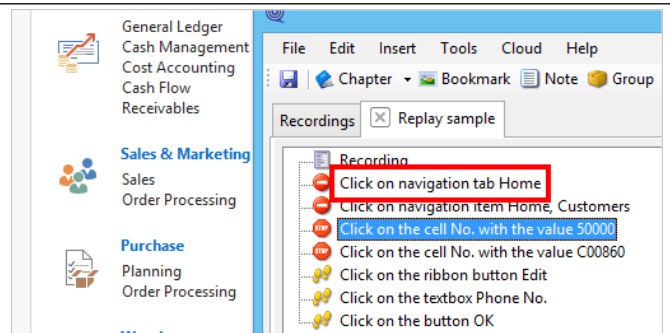


In this role the excluded steps is revealed and it is possible to include them again.

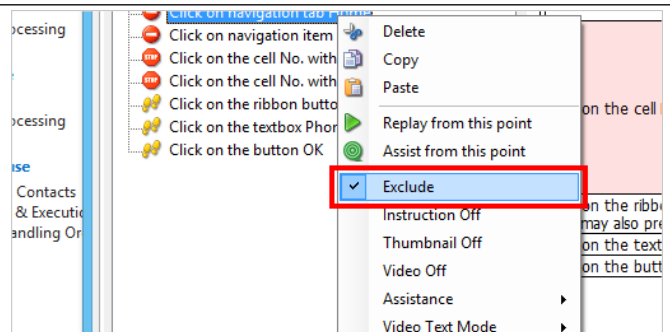
Click on the menu **Replay (Quality Assurance) role**.



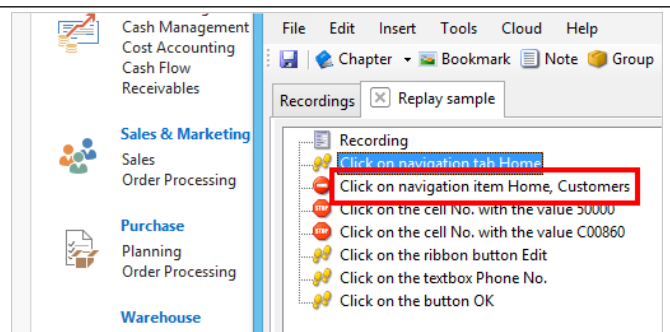
Right click on the folder **Click on navigation tab Home**.



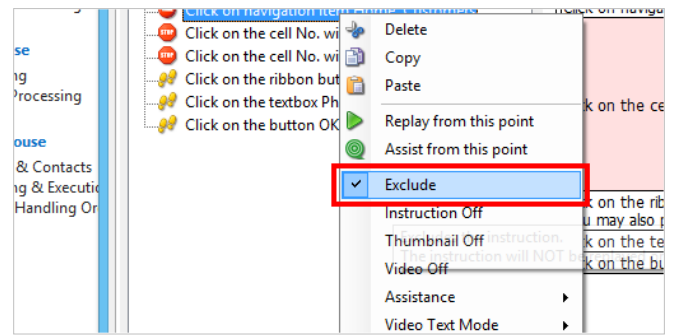
Click on the menu **Exclude**.



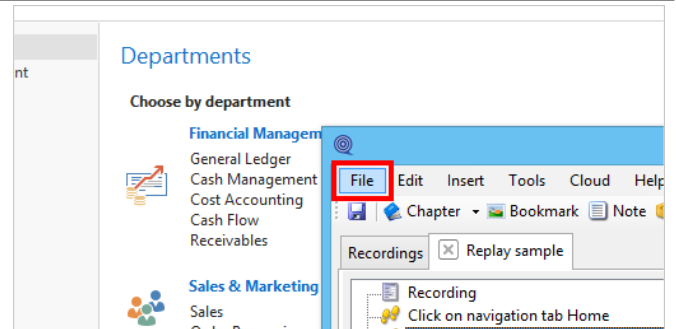
Right click on the folder **Click on navigation item Home, Customers**.



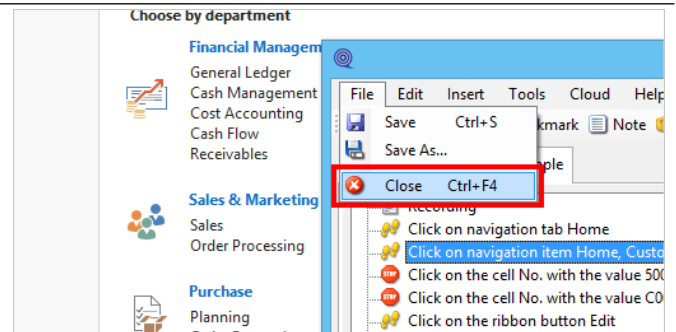
Click on the menu **Exclude**.



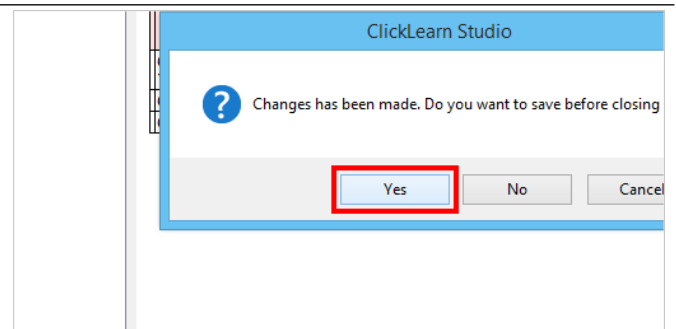
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

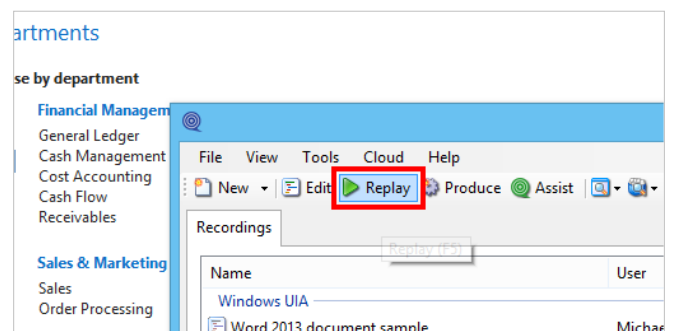


Click on the button **Yes**.
You may also press **Alt+Y**.



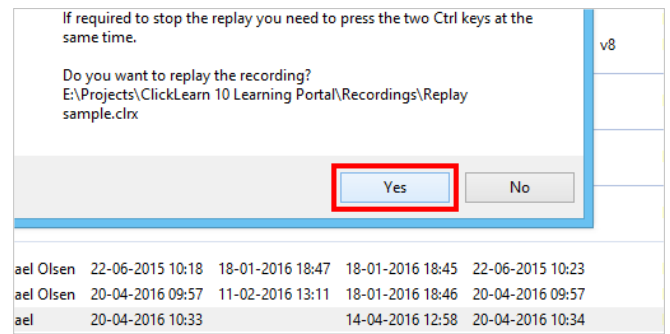
10.5.5. Replay success

Click on the button **Replay**.
You may also press **Alt+R**.

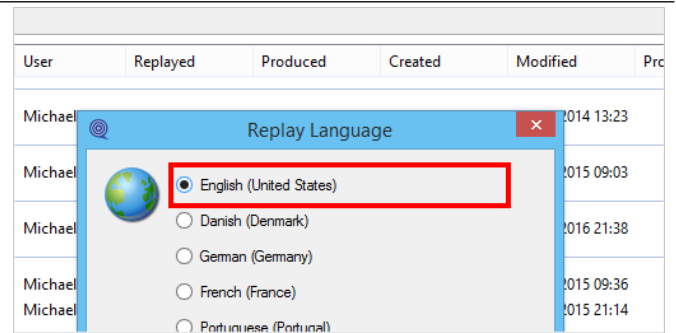


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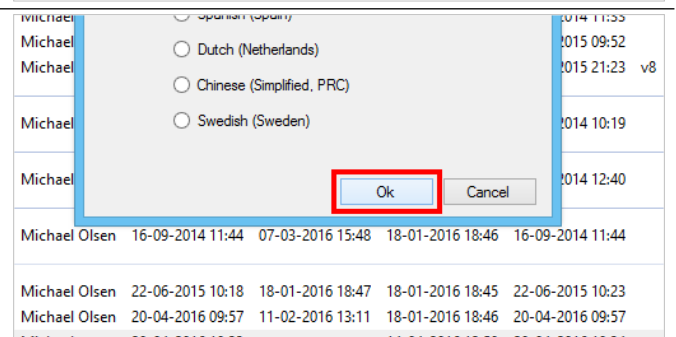
Click on the button **Yes**.
You may also press **Alt+Y**.



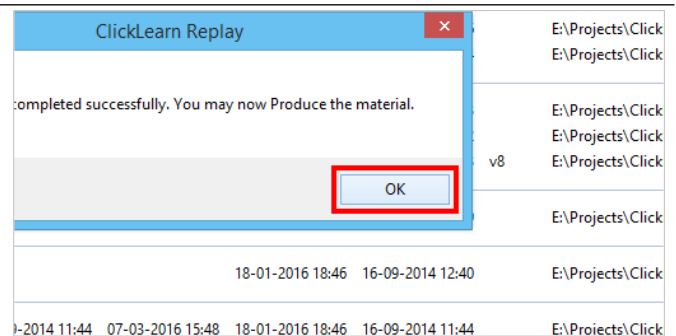
Click on the radio button **English (United States)**.



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



Click on the button **OK**.



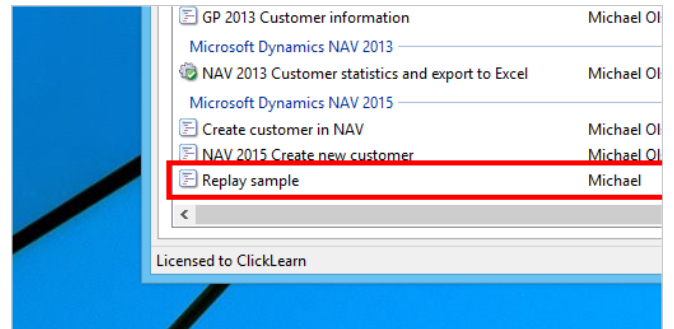
10.6.Replay role in the editor

10.6.1. Introduction

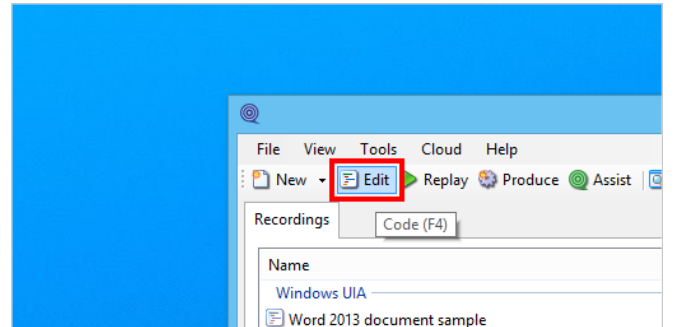
The editor gives you access to a replay role. This role will reveal the data required for the replay to work.

If the data in your system has changed, you may change it on the relevant steps, before executing the replay.

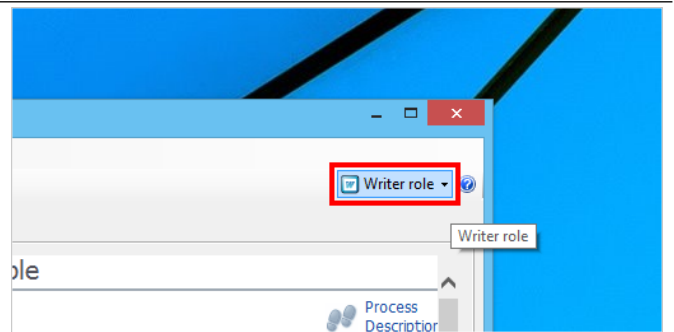
Click on the list element **Replay sample**.



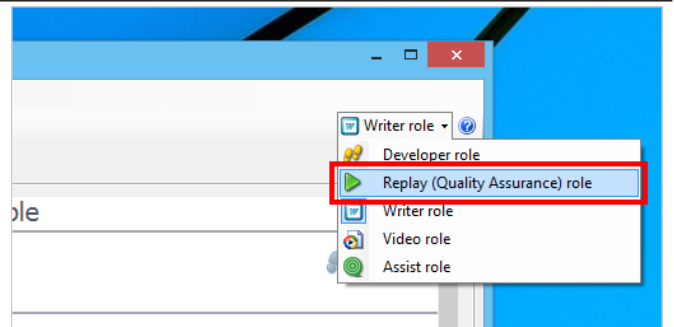
Click on the button **Edit**.
You may also press **Alt+D**.



Click on the menu **Writer role**.

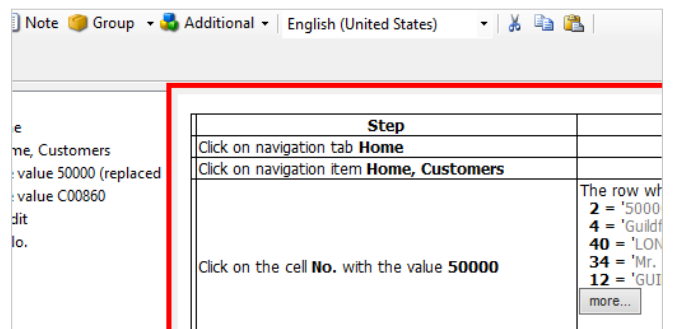


Click on the menu **Replay (Quality Assurance) role**.



10.6.2. Replay data preview

Move the mouse to **Replay Data preview**.



The preview will list all active replay steps and show where the replay will look for specific data.

Move the mouse to the Replay data column for the step with data present.

Replay Data	
Customers	
value 50000	<p>The row where 2 = '50000' and 4 = 'Guildford Water Department' and 40 = 'LONDON' and 34 = 'Mr. Jim Stewart' and 12 = 'GUILDFORD WATER DEPARTMENT' and <input type="button" value="more..."/></p> <p>Change · Fix to current row · Fix to row number 1 2 3 4 5</p>
+E	

Move the mouse to the link **Change**

cell No. with the value 50000	<p>The row where 2 = '50000' and 4 = 'Guildford Water Department' and 40 = 'LONDON' and 34 = 'Mr. Jim Stewart' and 12 = 'GUILDFORD WATER DEPARTMENT' and <input type="button" value="more..."/></p> <p>Change · Fix to current row · Fix to row number</p>
ribbon button Edit	
also press Ctrl+Shift+E	
textbox Phone No.	
button OK	

The link gives you direct access to change the replay data for the step.

Move the mouse to the link **Fix to current row**

with the value 50000	<p>The row where 2 = '50000' and 4 = 'Guildford Water Department' and 40 = 'LONDON' and 34 = 'Mr. Jim Stewart' and 12 = 'GUILDFORD WATER DEPARTMENT' and <input type="button" value="more..."/></p> <p>Change · Fix to current row · Fix to row number 1 2</p>
button Edit	
also press Ctrl+Shift+E	
textbox Phone No.	
button OK	

If you do not want to use the data captured by the recorder, you may click this link, and the replay will always use the current selected row instead.

Move the mouse to the link **1**

where 50000' and Guildford Water Department' and 'LONDON' and 'Mr. Jim Stewart' and 'GUILDFORD WATER DEPARTMENT' and <input type="button" value="more..."/>	<p>Change · Fix to current row · Fix to row number 1 2 3 4 5</p>

Clicking this link, will have the replay always to select a fixed row number in the data grid.

10.6.3. Change the replay data for a step

Click on the link **Change**

<p>Cell No. with the value 50000</p>	<p>The row where 2 = '50000' and 4 = 'Guildford Water Department' and 40 = 'LONDON' and 34 = 'Mr. Jim Stewart' and 12 = 'GUILDFORD WATER DEPARTMENT' and more...</p> <p>Change · Fix to current row · Fix to row number</p>
<p>Ribbon button Edit Also press Ctrl+Shift+E</p>	
<p>Textbox Phone No.</p>	
<p>Button OK</p>	

Click on the button **Uncheck all**.
You may also press **Alt+U**.

<input checked="" type="checkbox"/>	1102601002	U
<input checked="" type="checkbox"/>	72	RETAIL
<input checked="" type="checkbox"/>	38	DOMESTIC
<input checked="" type="checkbox"/>	36	PS
<input checked="" type="checkbox"/>	1102601012	n

Fixed Row **Uncheck all** Ok Cancel

The replay does not verify the columns that has been unchecked.

Click on **Enabled**.

Enabled	Column
<input checked="" type="checkbox"/>	4
<input type="checkbox"/>	40
<input type="checkbox"/>	34
<input type="checkbox"/>	12
<input type="checkbox"/>	1102601002

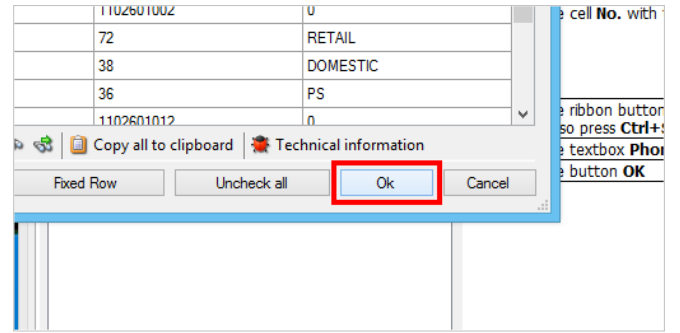
Double click on **the Data column**.

Column	Data
<input checked="" type="checkbox"/> 2	50000
<input type="checkbox"/> 4	Guildford Water Department
<input type="checkbox"/> 40	LONDON
<input type="checkbox"/> 34	Mr. Jim Stewart
<input type="checkbox"/> 12	GUILDFORD WATER DEPAR...
<input type="checkbox"/> 1102601002	0

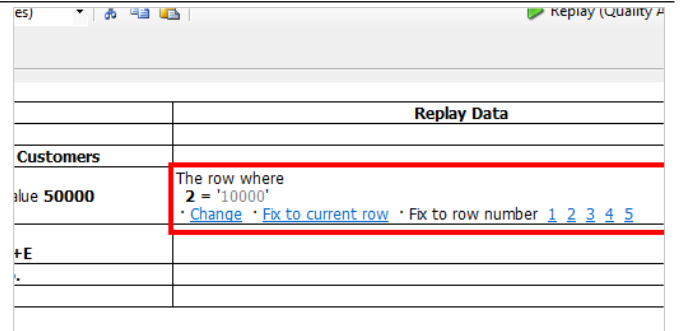
Enter a new data value.

Column	Data
<input checked="" type="checkbox"/> 2	1
<input type="checkbox"/> 4	Guildford Water Department
<input type="checkbox"/> 40	LONDON
<input type="checkbox"/> 34	Mr. Jim Stewart
<input type="checkbox"/> 12	GUILDFORD WATER DEPAR...
<input type="checkbox"/> 1102601002	0

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



Move the mouse to the Replay data column for the step with the changed data.



The changes may now be saved, and the replay will use the customer 10000 instead of 5000 at the next replay.

11. Quality Assurance and Testing

11.1. Data driven testing

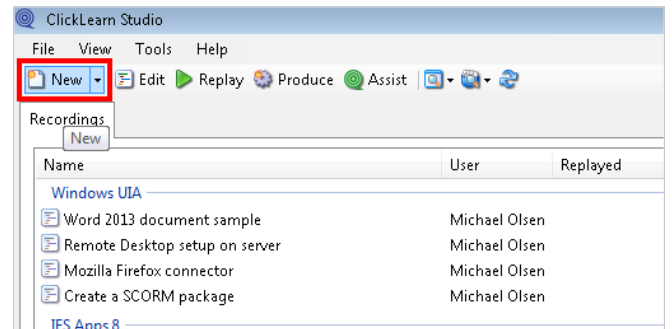
11.1.1. Introduction

You may extend the use of the replay functionality to perform data driven testing. Data driven testing is useful when you want to test a certain process multiple times, feeding the same flow with different data entries.

11.1.2. Record the test flow

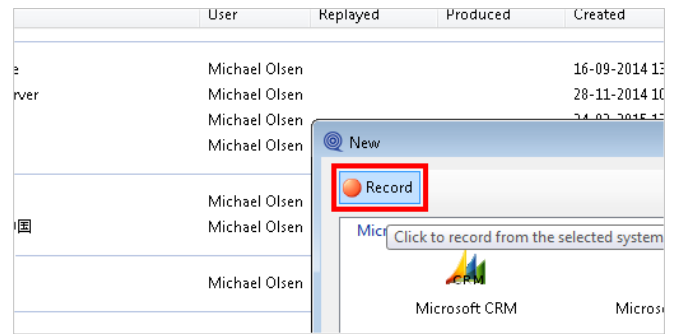
First you need to record the full flow of your test case. In this example, we want to test the creation of multiple customers in our system.

Click on the button **New**.
You may also press **Alt+N**.

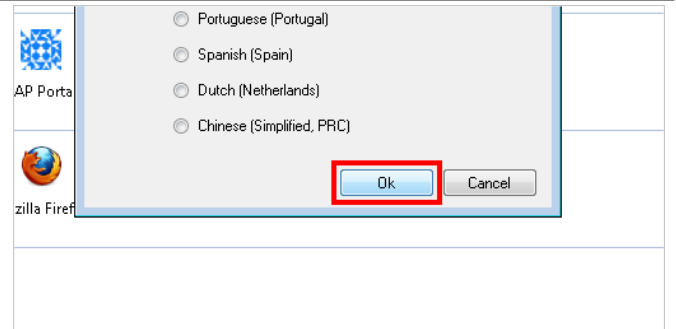


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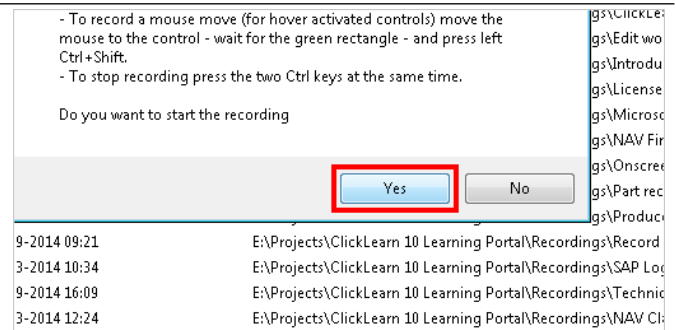
Click on the button **Record**.
You may also press **Alt+R**.



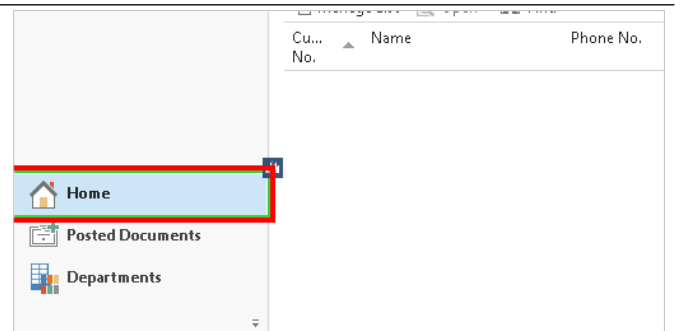
Click on the button **Ok**.
You may also press **Alt+O**.



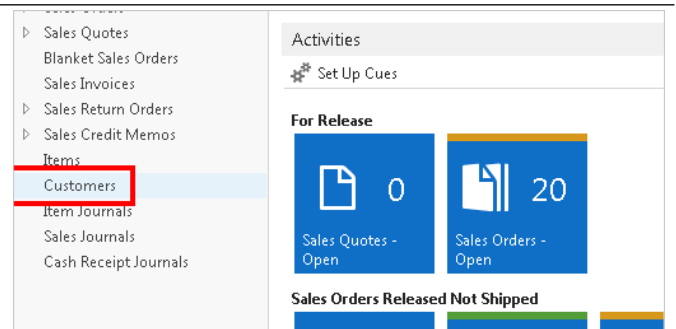
Click on the button **Yes**.
You may also press **Alt+Y**.



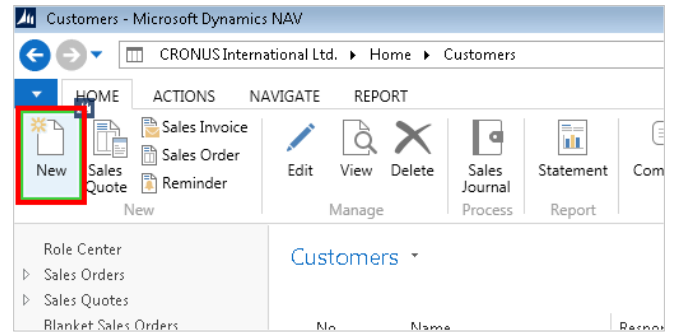
Click on the tab **Home**.



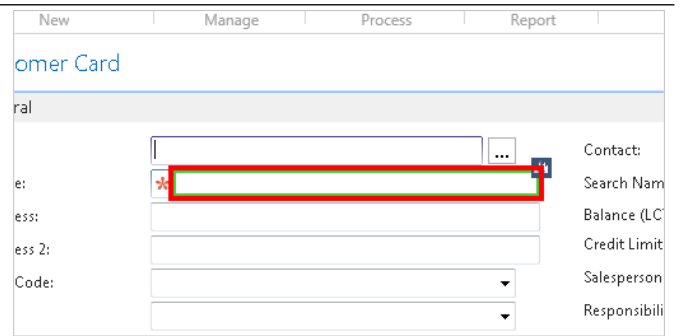
Click on the folder **Customers**.



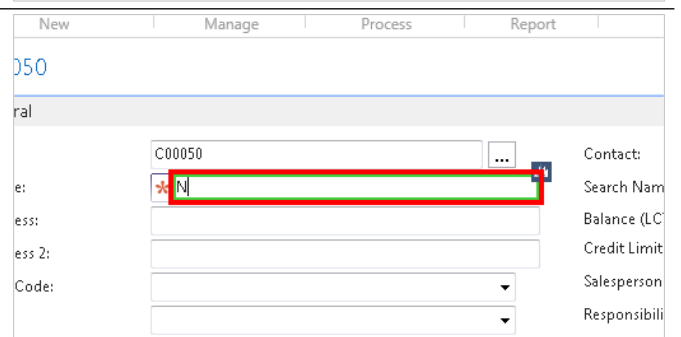
Click on the button **New**.



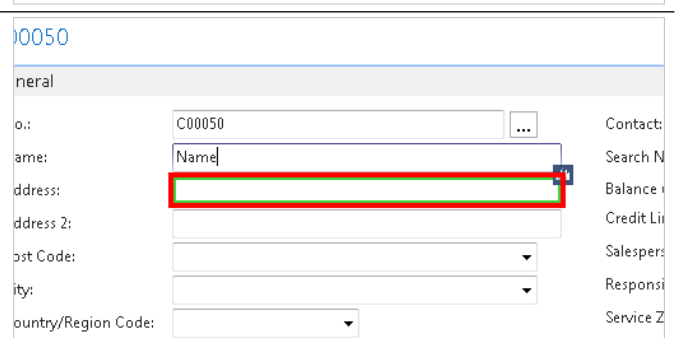
Click on the input field **Name**.



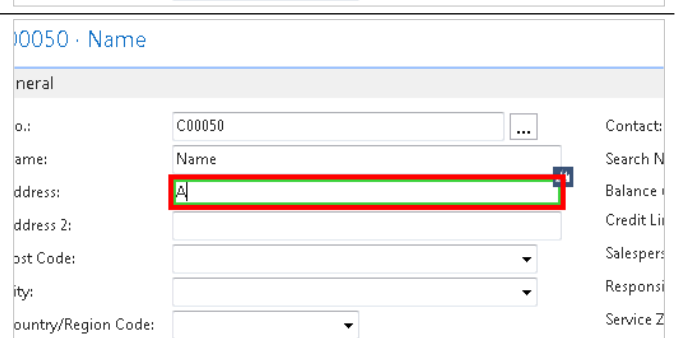
Enter **Name**.



Click on the input field **Address**.

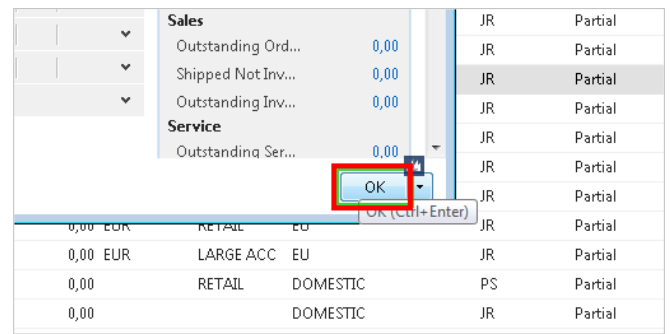


Enter **Address**.



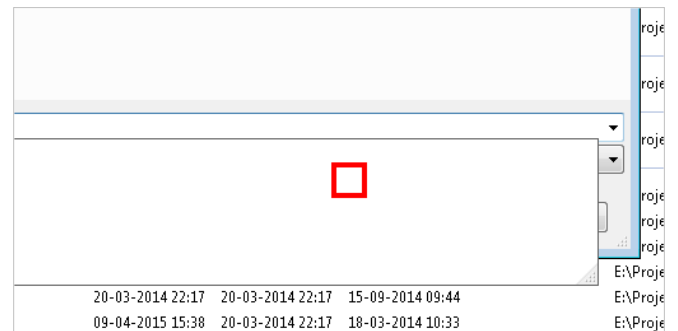
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Click on the button **Ok**.

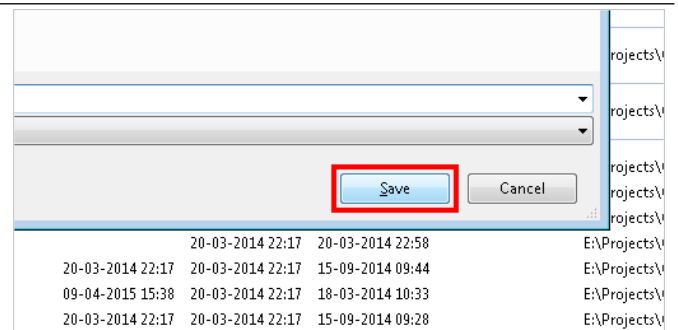


Stop the recorder by pressing the two control keys and save the recording.

Enter **Ok**.



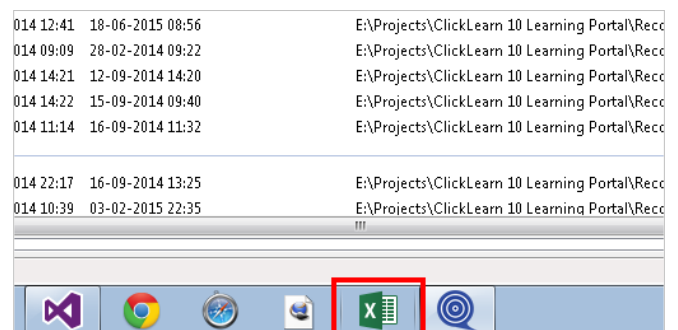
Click on the button **Save**.
You may also press **Alt+S**.



11.1.3. Use Excel to define the data

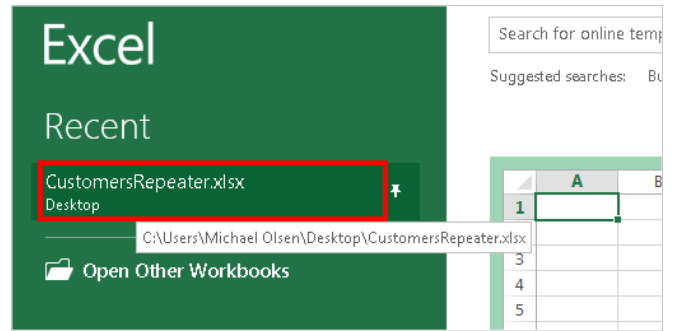
Let's look at a sample Excel workbook, where we have defined 3 customers with a name and address.

Click on the button **Excel 2013**.



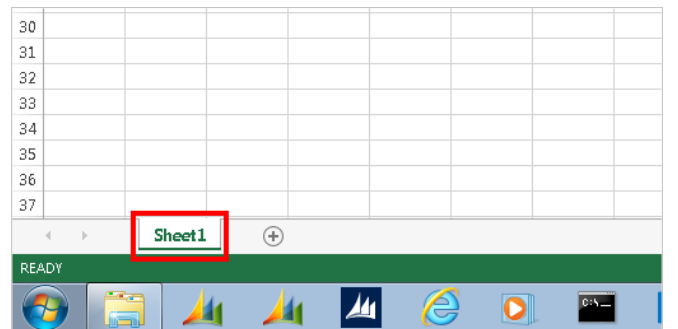
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Click on the link **C:\Users\Michael Olsen\Desktop\CustomersRepeater.xlsx**.



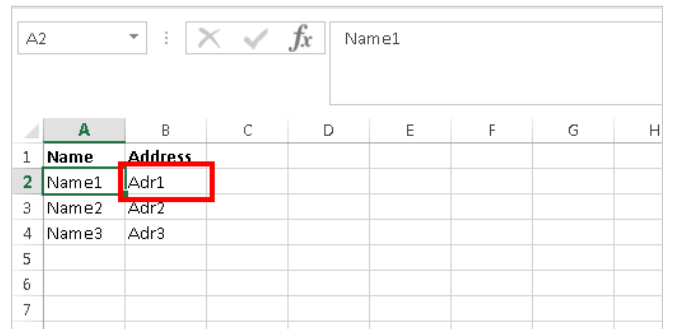
First, it is important that you notice the name of the sheet we have in the workbook.

Click on the tab **Sheet1**.

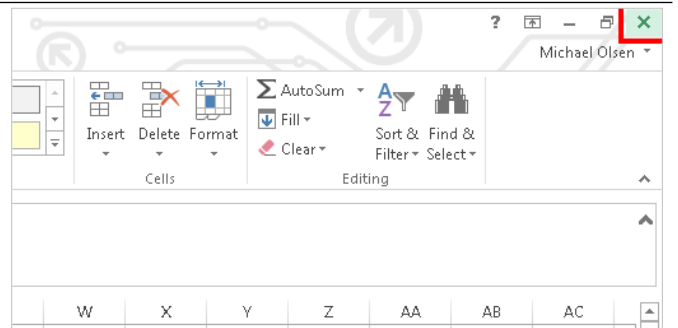


Secondly, make sure that the data itself is defined starting at row 2. Row 1 is used as heading. The Cell A contains the name and the Cell B contains the address.

Click on the cell **B2** with the value **Adr1**



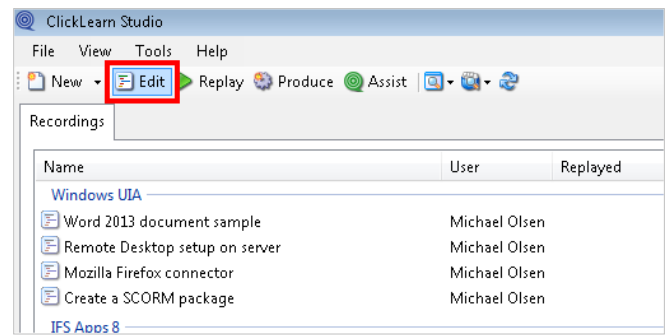
Click on the button **Close**.



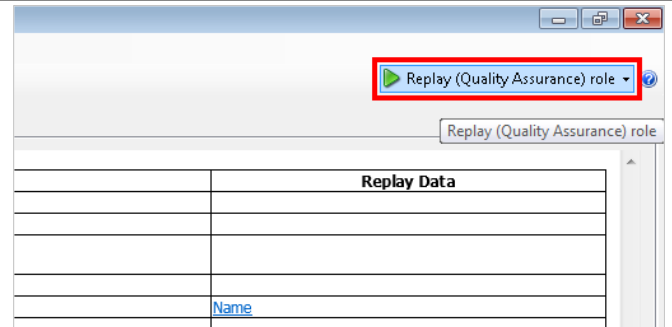
11.1.4. Link recording and data

We need to make the recording aware of the data we want to use.

Click on the button **Edit**.
You may also press **Alt+D**.



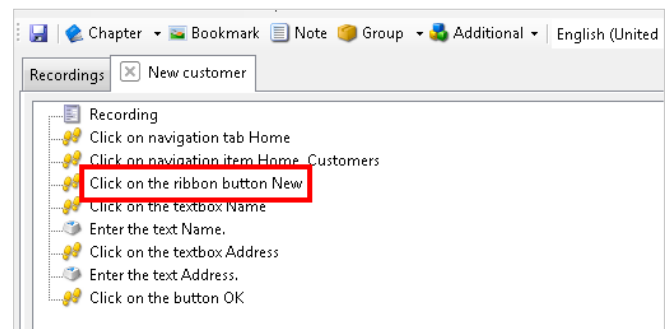
Click on the menu **Replay (Quality Assurance)** role.



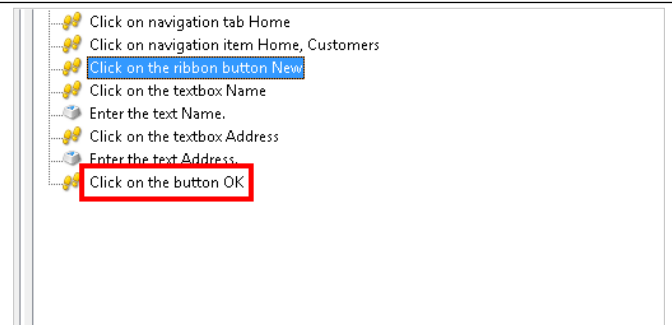
This role is ideal when working with test cases. The preview to the right gives a clear view of the steps involving data.

To the left, we have all the steps from our recorded session. What we want to do now is to group a number of steps into a repeater, which we will link to our data, defined in the Excel workbook.

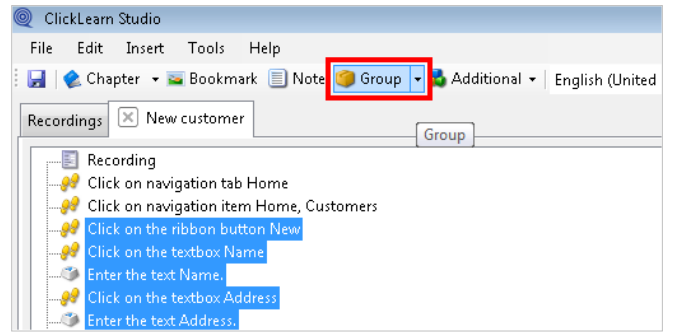
Click on the first step that needs to be repeated



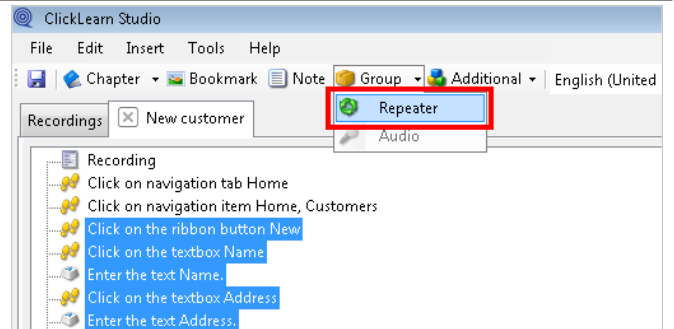
Click on the last step to be repeated.



Click on the dropdown button of the button named **Group**.

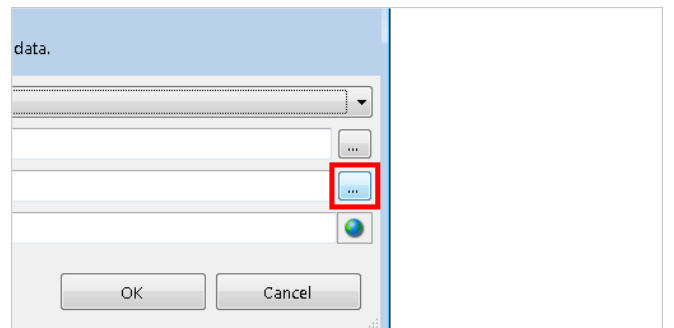


Click on the menu **Repeater**.

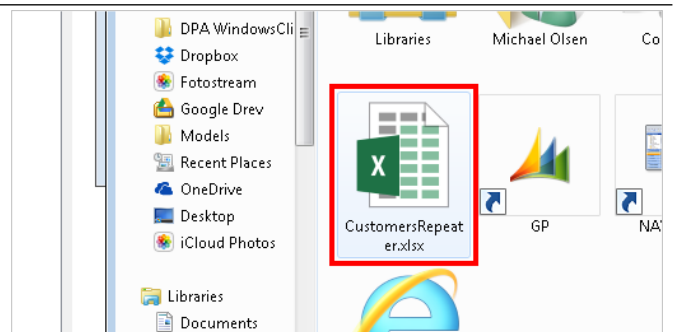


First, we need to locate the Excel workbook.

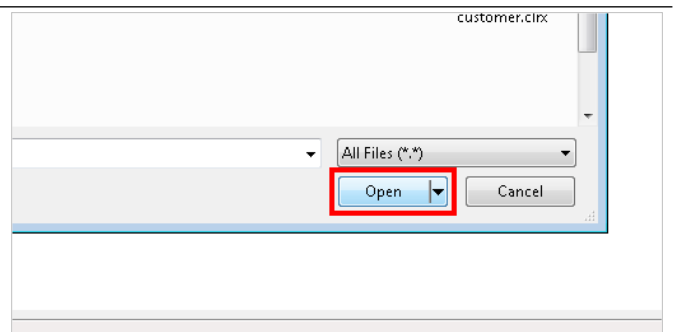
Click on the button



Click on the list element **CustomersRepeater.xlsx**.



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



Then, we need to provide the name of the sheet to use from the workbook.

Click on the input field **Custom parameter**.

Enter **Custom parameter**.

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

You have to replace the fixed entered data from the recording session.

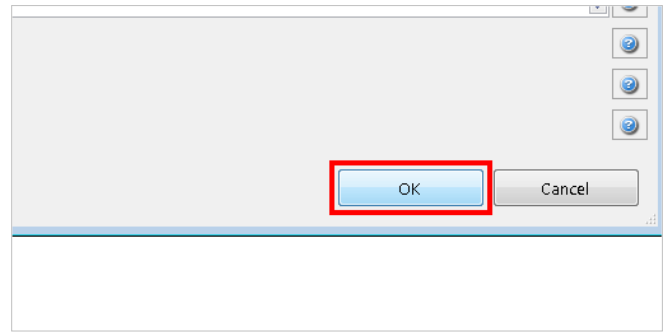
Click on the link **Name**

Replay Data	
	Name
	Address

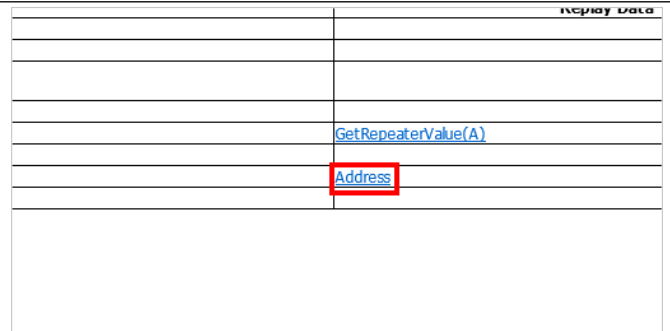
Fixed values, such as keyboard input, become data driven, by referring to the data using the function named GetRepeaterValue. This function has one parameter, which is the name of the cell.

Enter the text **GetRepeaterValue(A)**.

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



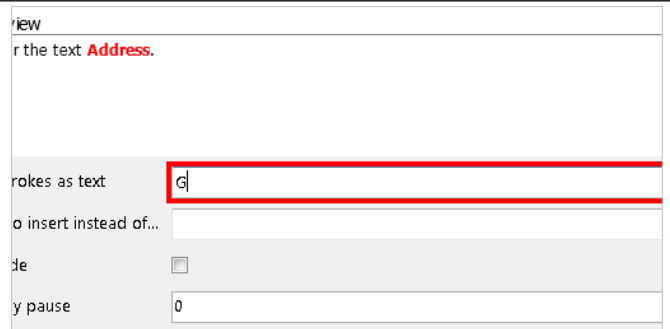
Click on the link **Address**



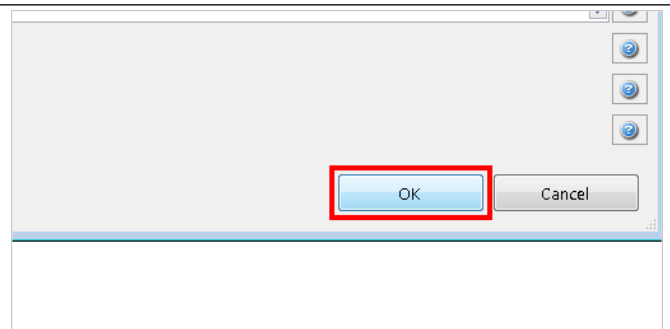
Click on the input field **Keystrokes as text**.



Enter the text **GetRepeaterValue(B)**.

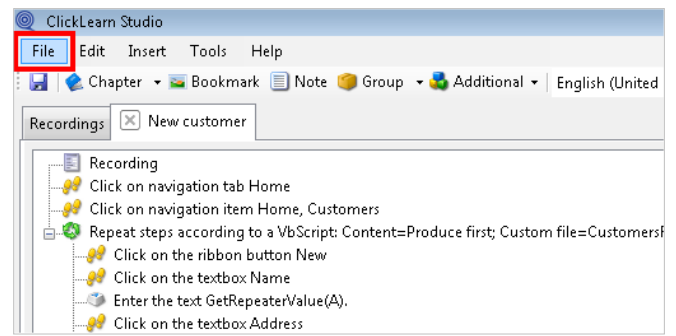


Click on the button **OK**.
You may also press **Alt+O**.

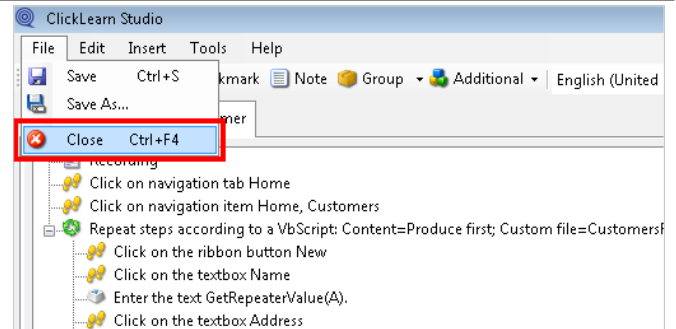


When done, you may save the recording, which is now ready to run.

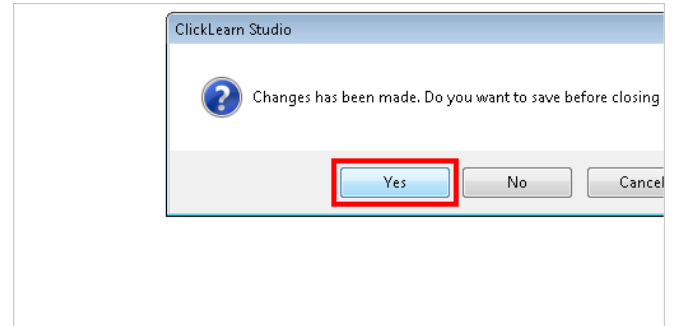
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

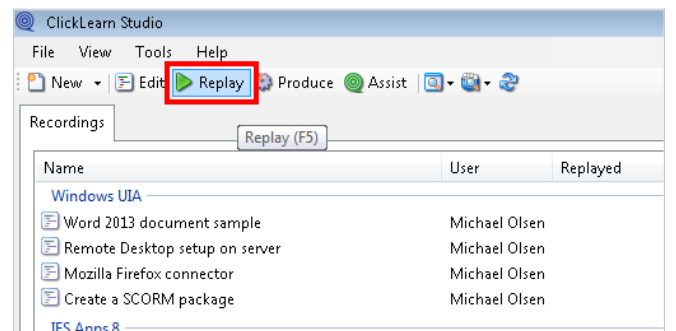


Click on the button **Yes**.
You may also press **Alt+Y**.

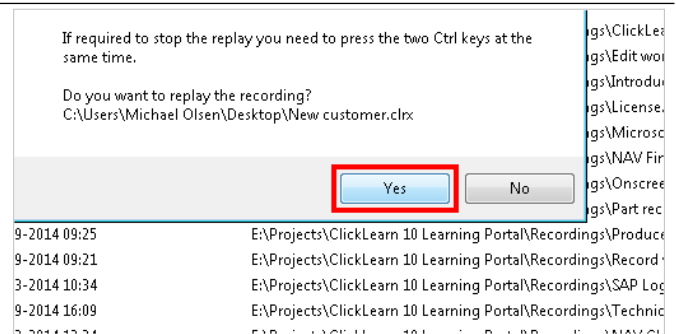


11.1.5. Run the test

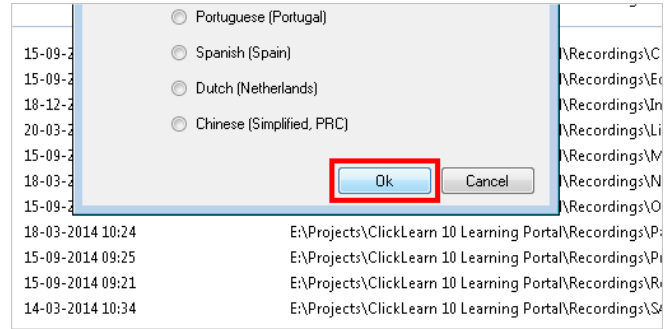
Click on the button **Replay**.
You may also press **Alt+R**.



Click on the button **Yes**.
You may also press **Alt+Y**.

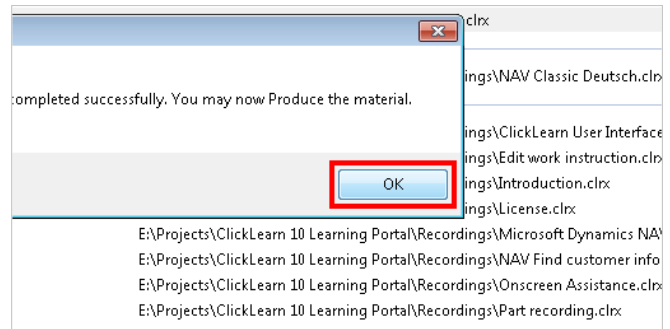


Click on the button **Ok**.
You may also press **Alt+O**.



The replay will now run the test. In this case it will repeat the creation of a new customer 3 times.

Click on the button **OK**.

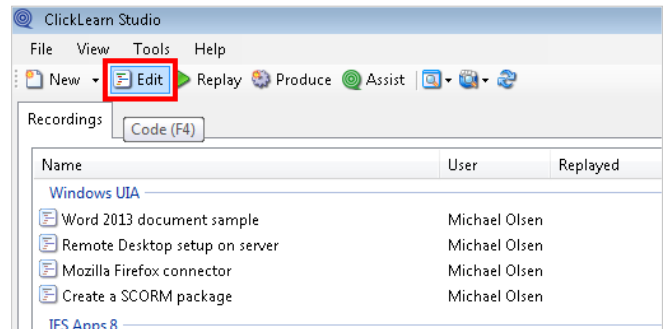


11.1.6. How to produce documentation for all data entries

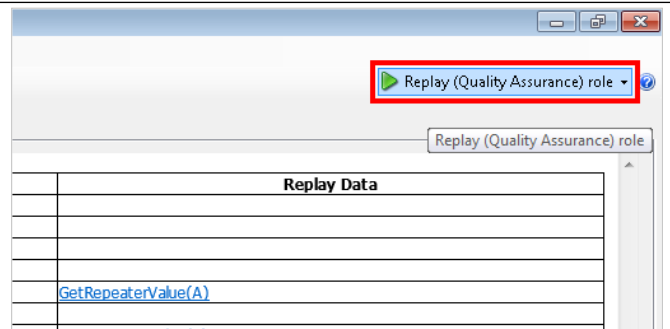
By default, when using the repeater group feature, the produced material will only show the first data entry performed in the test run.

However, you will be able to change this, so that ClickLearn may produce the written and visual documentation for all data entries performed in the test.

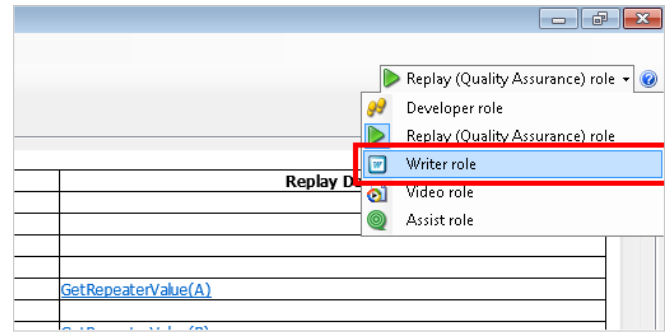
Click on the button **Edit**.
You may also press **Alt+D**.



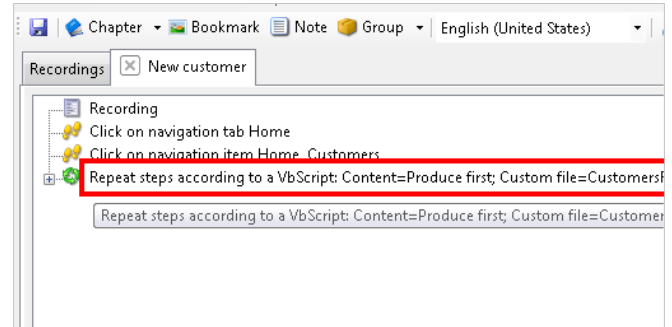
Click on the menu **Replay (Quality Assurance) role**.



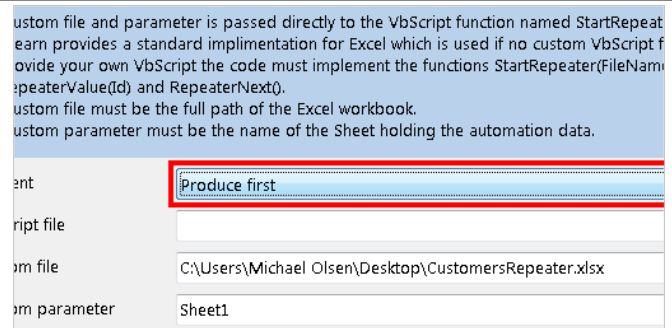
Click on the menu **Writer role**.



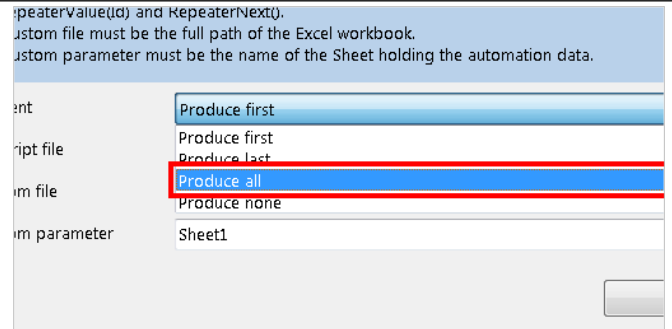
Double click on the folder **Repeat steps according to a VbScript: Content=Produce first; Custom file=CustomersRepeater.xlsx; Custom parameter=Sheet1**.



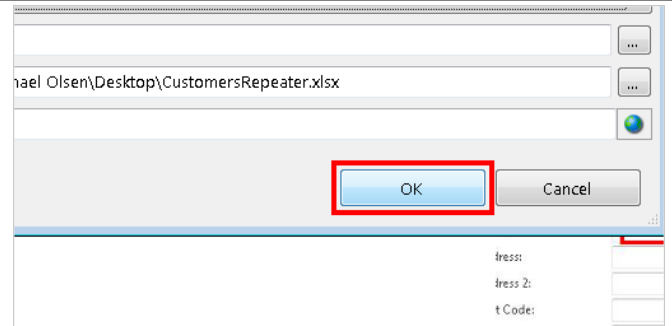
Click on the combo box .



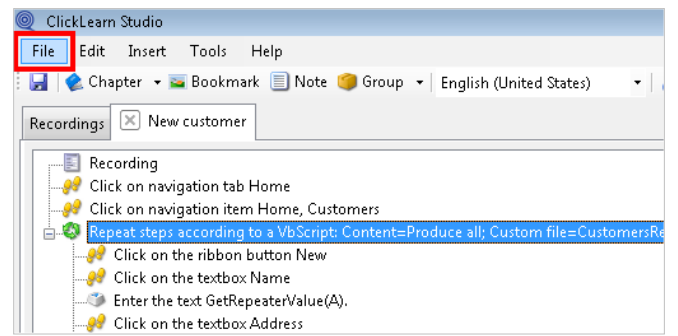
Click on the list element **Produce all**.



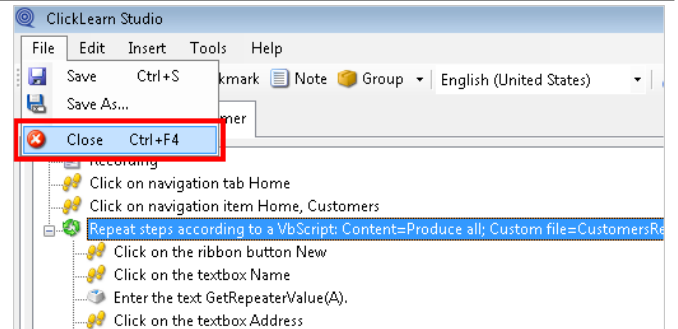
Click on the button **OK**.
You may also press **Alt+O**.



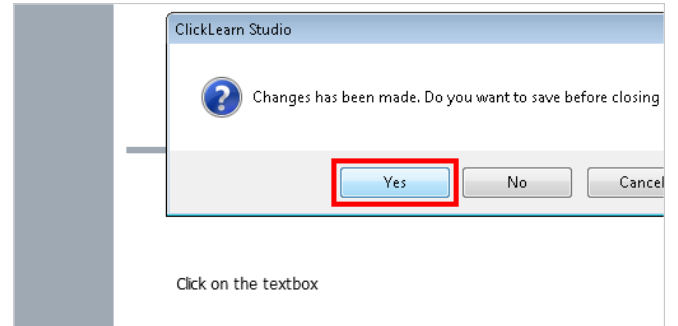
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.

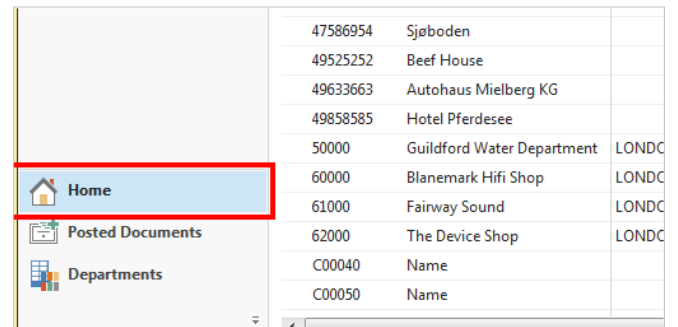


Click on the button **Yes**.
You may also press **Alt+Y**.

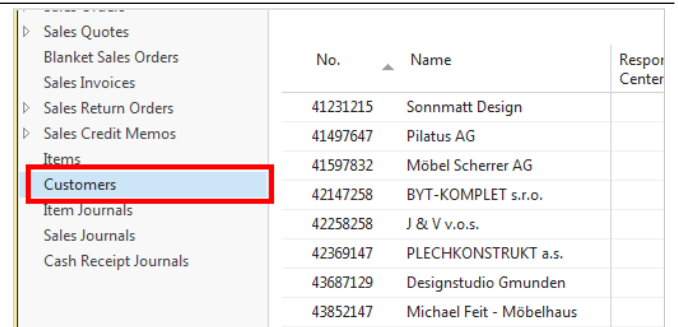


11.2. Create customer in NAV

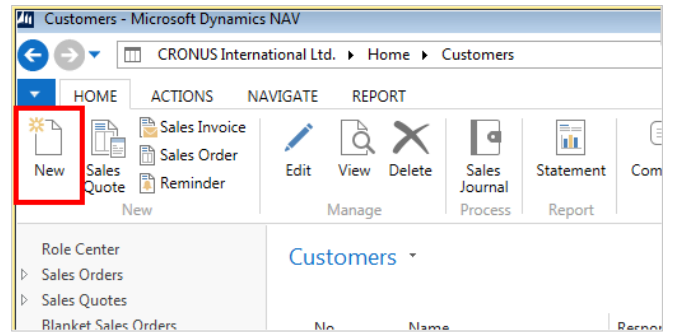
Click on navigation tab **Home**



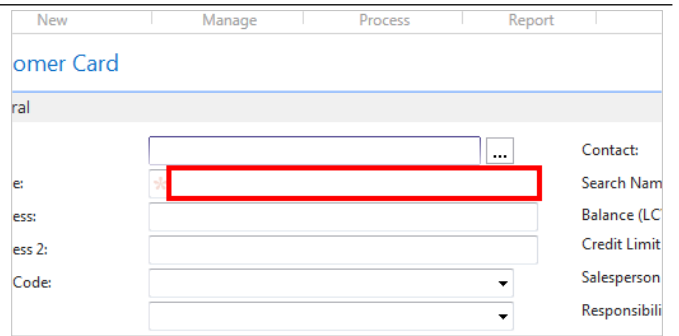
Click on navigation item **Home, Customers**



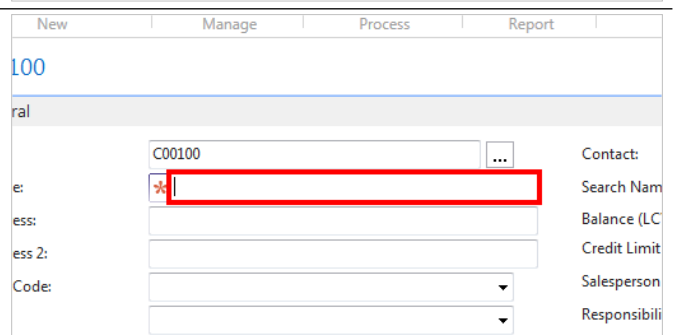
Click on the ribbon button **New** (Ctrl+N) to create a new entry.



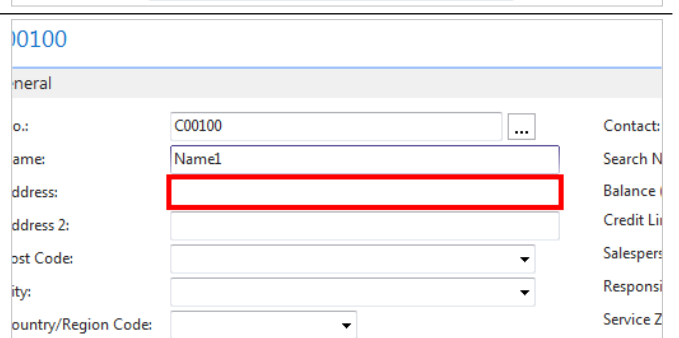
Click on the textbox **Name**



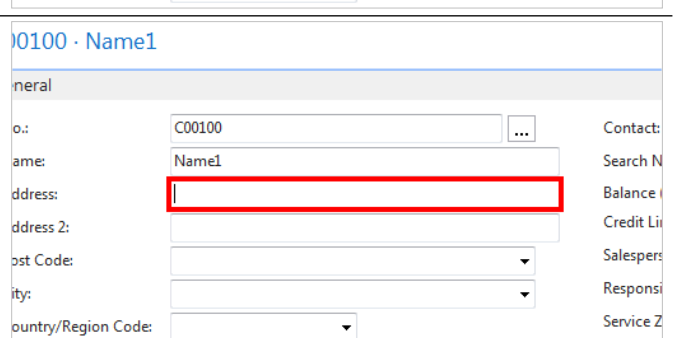
Enter **Name**.



Click on the textbox **Address**



Enter **Address**.



Click on the button **OK**

	Sales			JR	Partial
	Outstanding Ord...	0,00		JR	Partial
	Shipped Not Inv...	0,00		JR	Partial
	Outstanding Inv...	0,00		JR	Partial
	Service			JR	Partial
	Outstanding Ser...	0,00		JR	Partial
0,00	EUR	RETAIL	EU	JR	Partial
0,00	EUR	LARGE ACC	EU	JR	Partial
0,00		RETAIL	DOMESTIC	PS	Partial
0,00			DOMESTIC	JR	Partial

Click on the ribbon button **New** (Ctrl+N) to create a new entry.

Click on the textbox **Name**

Enter **Name**.

Click on the textbox **Address**

Enter **Address**.

00110 · Name2

General

No.: C00110 ... Contact:

Name: Name2 Search Name:

Address: Balance (LCY):

Address 2: Credit Limit:

Post Code: Salesperson:

City: Responsibility:

Country/Region Code: Service Zone:

Click on the button **OK**

Sales		JR	Partial
Outstanding Ord...	0,00	JR	Partial
Shipped Not Inv...	0,00	JR	Partial
Outstanding Inv...	0,00	JR	Partial
Service		JR	Partial
Outstanding Ser...	0,00	JR	Partial
0,00 EUR	RETAIL EU	JR	Partial
0,00 EUR	LARGE ACC EU	JR	Partial
0,00	RETAIL DOMESTIC	PS	Partial
0,00	DOMESTIC	JR	Partial

Click on the ribbon button **New** (Ctrl+N) to create a new entry.

Customers - Microsoft Dynamics NAV

CRONUS International Ltd. Home Customers

HOME ACTIONS NAVIGATE REPORT

New Sales Invoice Sales Order Sales Quote Reminder Edit View Delete Sales Journal Statement Com

Role Center Customers

Sales Orders Sales Quotes Blanket Sales Orders

Click on the textbox **Name**

New Manage Process Report

Customer Card

General

No.: ... Contact:

Name: Search Name:

Address: Balance (LCY):

Address 2: Credit Limit:

Code: Salesperson:

City: Responsibility:

Enter **Name**.

New Manage Process Report

00120

General

No.: C00120 ... Contact:

Name: Search Name:

Address: Balance (LCY):

Address 2: Credit Limit:

Code: Salesperson:

City: Responsibility:

Click on the textbox **Address**

00120

General

Code: C00120

Name: Name3

Address:

Address 2:

Post Code:

City:

Country/Region Code:

Contact: Search N
Balance
Credit Li
Salespers
Responsi
Service Z

Enter **Address**.

00120 · Name3

General

Code: C00120

Name: Name3

Address:

Address 2:

Post Code:

City:

Country/Region Code:

Contact: Search N
Balance
Credit Li
Salespers
Responsi
Service Z

Click on the button **OK**

Sales		JR	Partial
Outstanding Ord...	0,00	JR	Partial
Shipped Not Inv...	0,00	JR	Partial
Outstanding Inv...	0,00	JR	Partial
Service		JR	Partial
Outstanding Ser...	0,00	JR	Partial
0,00 EUR	RETAIL EU	JR	Partial
0,00 EUR	LARGE ACC EU	JR	Partial
0,00	RETAIL DOMESTIC	PS	Partial
0,00	DOMESTIC	JR	Partial

OK

12. Robotic Process Automation

12.1. Global replay data

Robotic process automation is a way to batch replay multiple recordings in a specific sequence.

Each recording will automatically perform a task within the system and optionally collect data into a global replay data storage.

The collected data may be used by the next recording to enter or select the required data.

Click on the menu **Tools**.

ClickLearn Studio

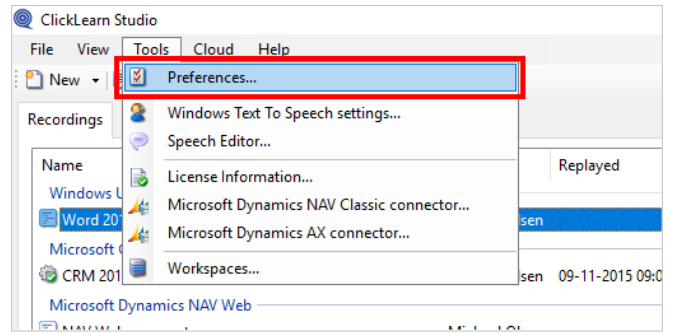
File View **Tools** Cloud Help

New Edit Replay Produce Assist

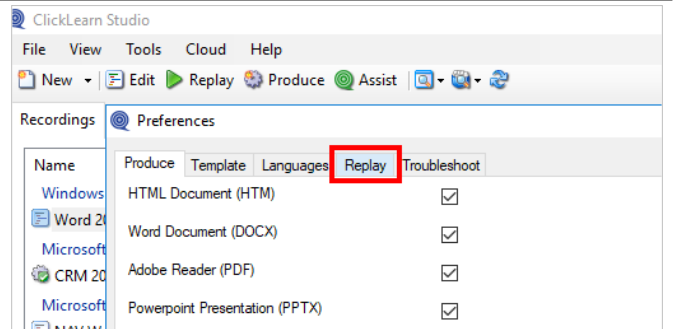
Recordings

Name	User	Replayed
Windows UIA		
Word 2013 document sample	Michael Olsen	
Microsoft CRM		
CRM 2015 Testing create new account	Michael Olsen	09-11-2015 09:0
Microsoft Dynamics NAV Web		

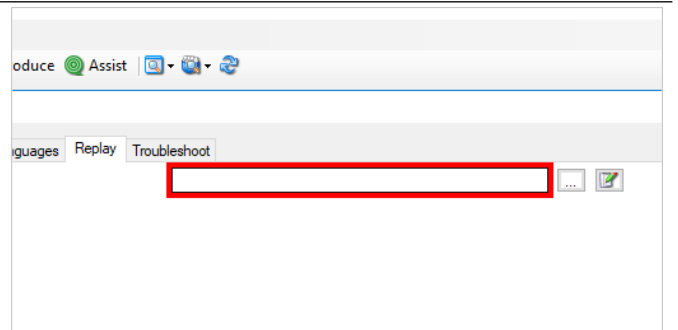
Click on the menu **Preferences...**



Click on the tab **Replay**.

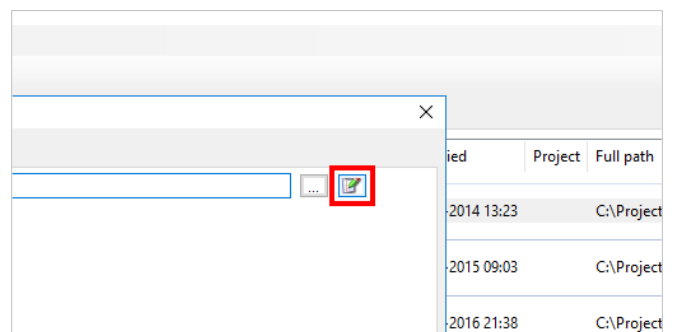


Click on the input field **Global values**.

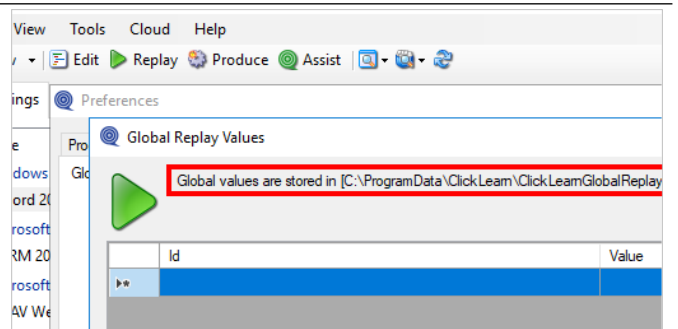


You may choose to provide a different file path to store the global replay data.

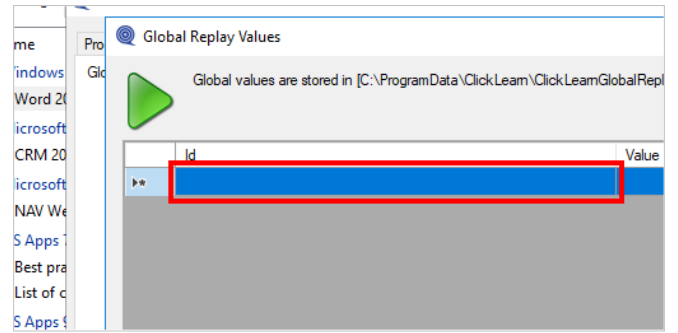
Click on the button **Edit**.



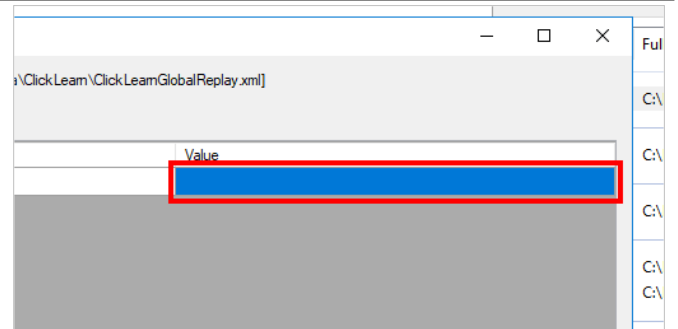
Move the mouse to **Global values are stored in [C:\ProgramData\ClickLearn\ClickLearnGlobalReplay.xml]**. This will show the location of the global replay data file.



Click on **Id**.
This column is a unique name identification of any value stored.



Click on **Value**.
This column is the actual value stored. Normally, it is set by a recording when replayed, but you may enter it manually in this dialog.



The value may use a special syntax to generate custom or unique values. To use it the value must start with the \$-character, every part must be separated by a comma and all pre-defined parts must be in upper case letters as listed below.

- GUID
- RANDOM
- WINUSER
- YEAR
- MONTH
- DAY
- HOUR
- MINUTE
- SECOND
- TICKS

RANDOM may also optionally be followed by a maximum value, or a minimum value and a maximum value.

YEAR, MONTH, DAY, HOUR, MINUTE and SECONDS may optionally be followed by a number of seconds to add to the current date time value.

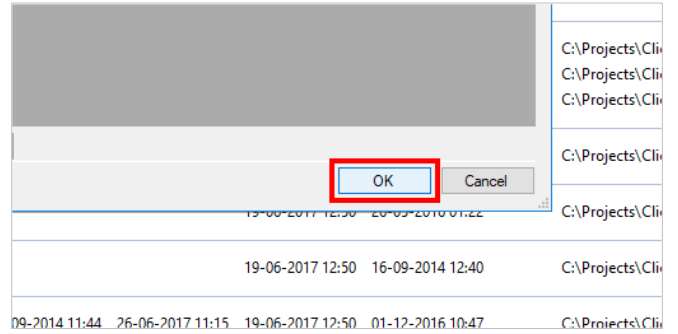
Here are some examples:

- \$GUID
aff33ef9-b59b-4f8d-aaa3-1deae2a9d094
- \$RANDOM,1000,2000
1547
- \$YEAR,MONTH,DAY
20180810
- \$YEAR,1209600,MONTH,DAY
20182208, if the current date is 10th of August 2018.

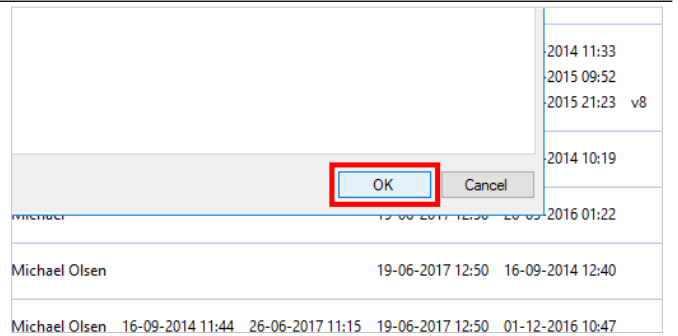
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- \$uniqueid=,GUID,date=,YEAR,MONTH,DAY,time=,HOUR,MINUTE,SECOND
uniqueid=aff33ef9-b59b-4f8d-aaa3-1deae2a9d094date=20180810time=142608

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



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



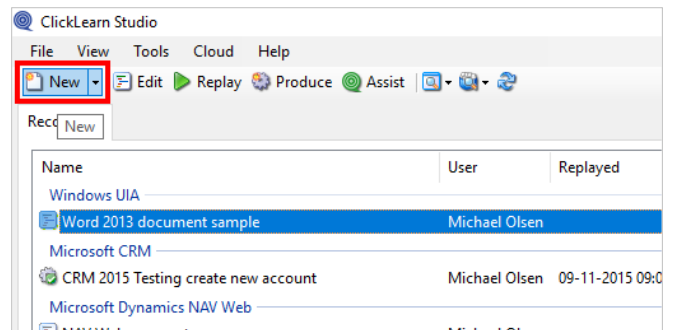
12.2.RPA Sample recordings on IFS

In order to showcase robotic process automation on IFS Applications, we will start by recording 3 work instructions.

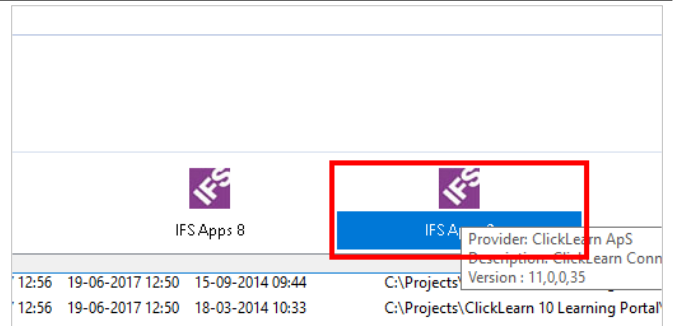
The goal is to find a supplier and a coordinator and use the collected id's to create a new purchase order.

12.2.1. Find supplier

Click on the button **New**.
You may also press **Alt+N**.

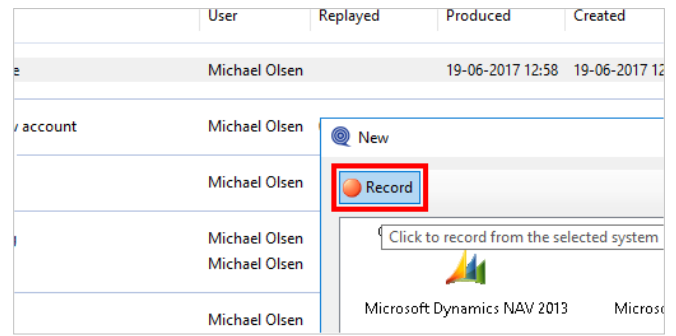


Click on the list element **IFS Apps 9**.

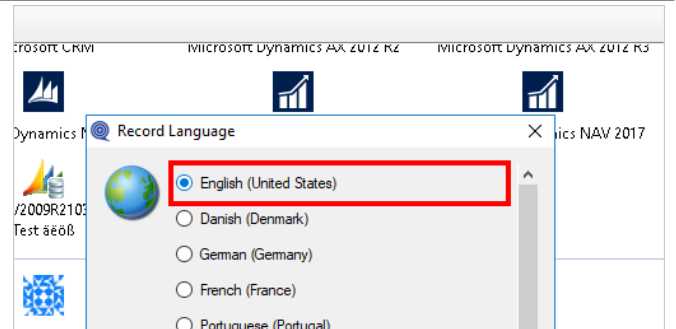


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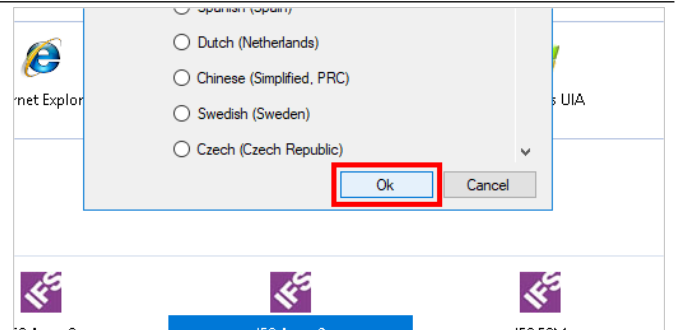
Click on the button **Record**.
You may also press **Alt+R**.



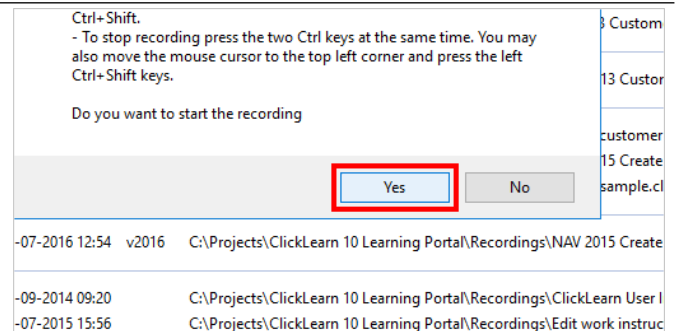
Click on the radio button **English (United States)**.



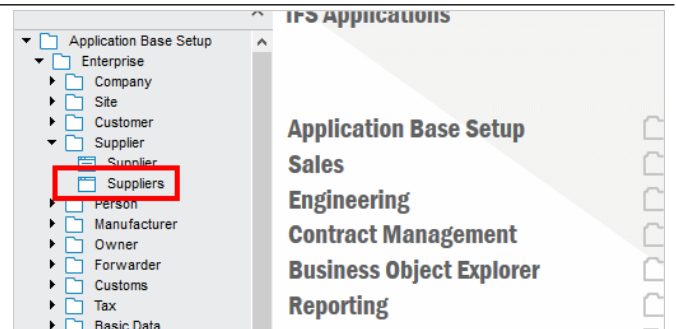
Click on the button **Ok**.
You may also press **Alt+O**.



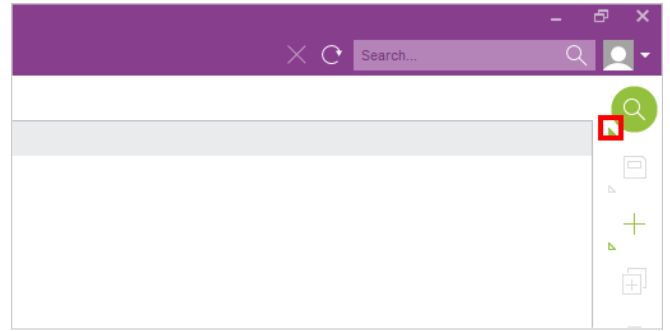
Click on the button **Yes**.
You may also press **Alt+Y**.



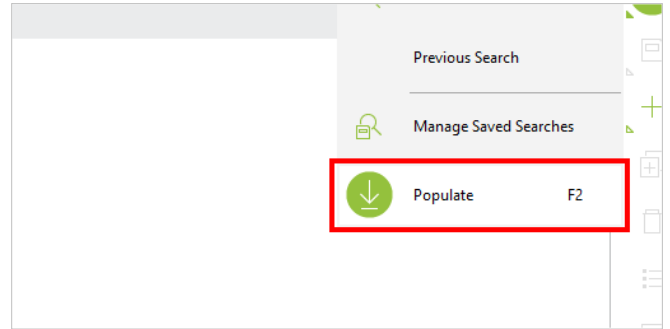
Navigate to **Application Base Setup, Enterprise, Supplier, Suppliers**.



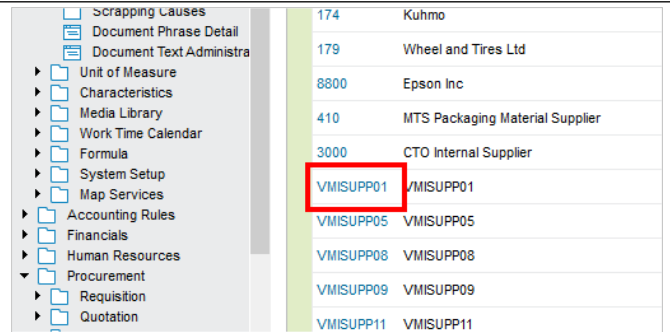
Click on the menu item drop down **Search**.



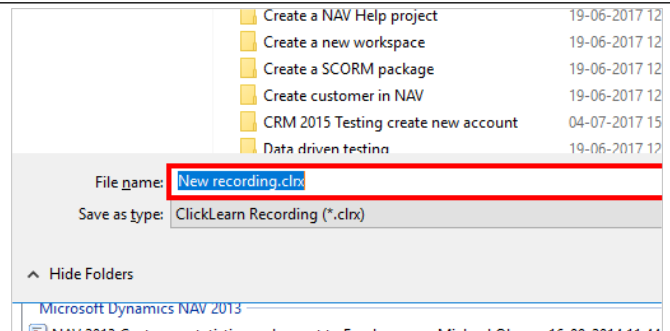
Click on the menu item **Populate**.
You may also press **F2**.



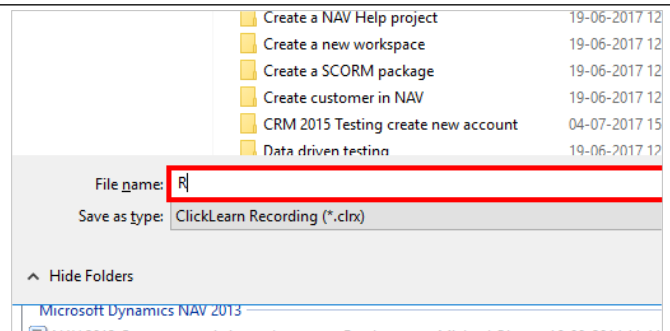
Click on the column **Supplier** with the value **VMISUPP01**.



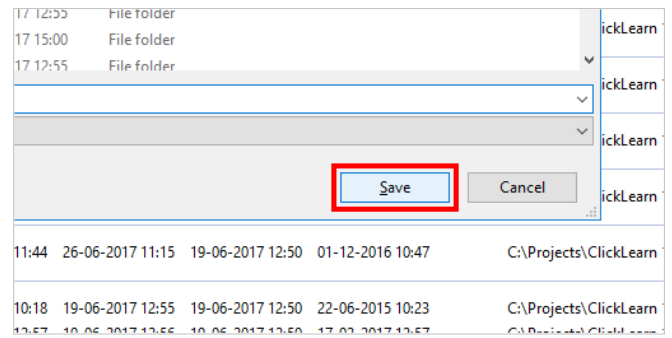
Click on the input field **File name:**.
You may also press **ALT+N**.



Enter **File name:**.

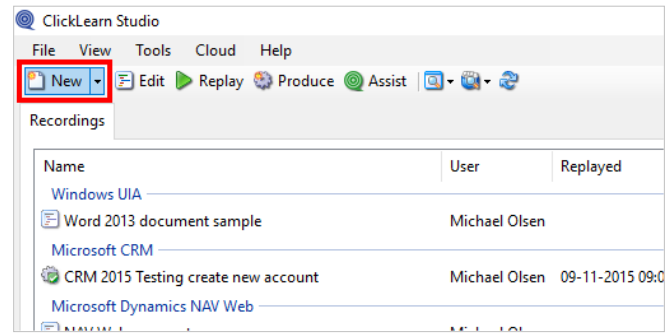


Click on the button **Save**.
You may also press **Alt+S**.

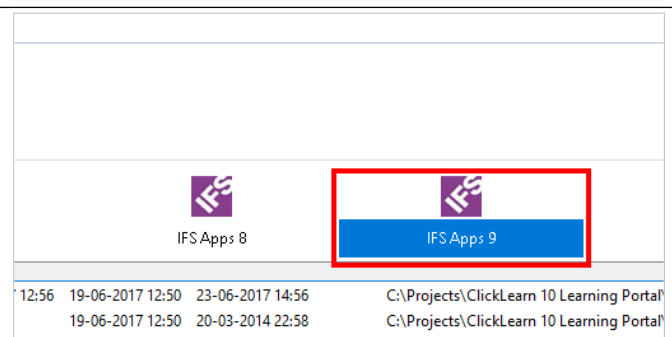


12.2.2. Find coordinator

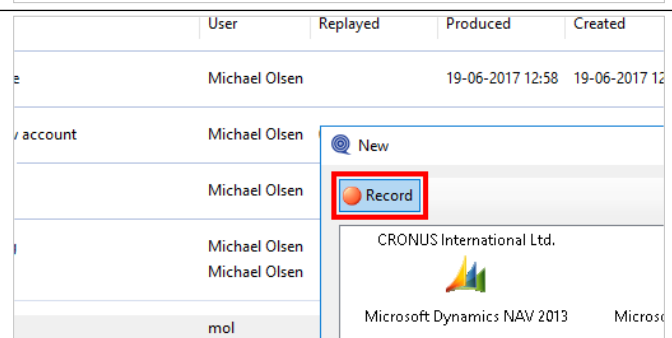
Click on the button **New**.
You may also press **Alt+N**.



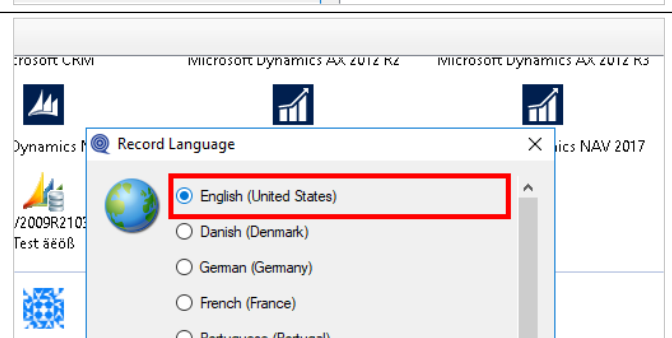
Click on the list element **IFS Apps 9**.



Click on the button **Record**.
You may also press **Alt+R**.

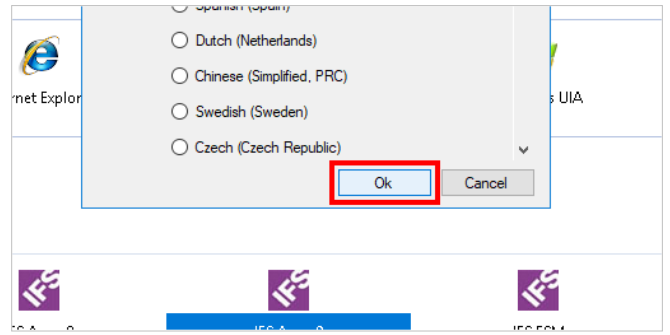


Click on the radio button **English (United States)**.

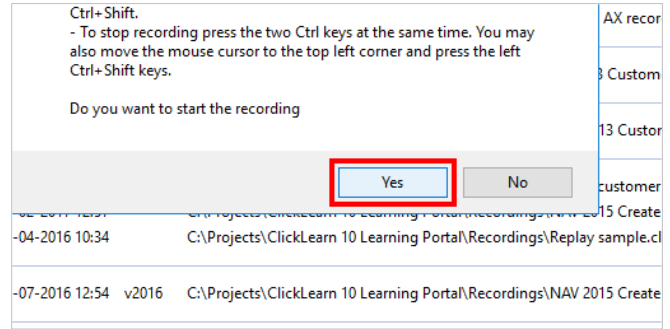


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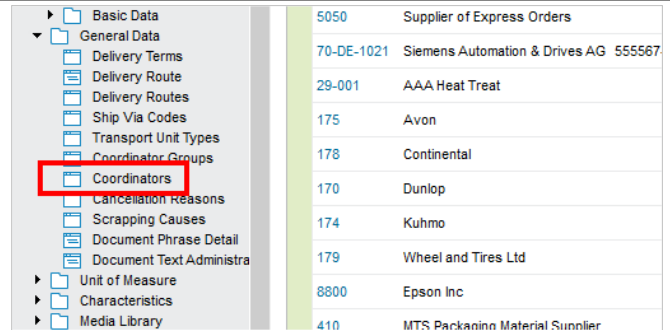
Click on the button **Ok**.
You may also press **Alt+O**.



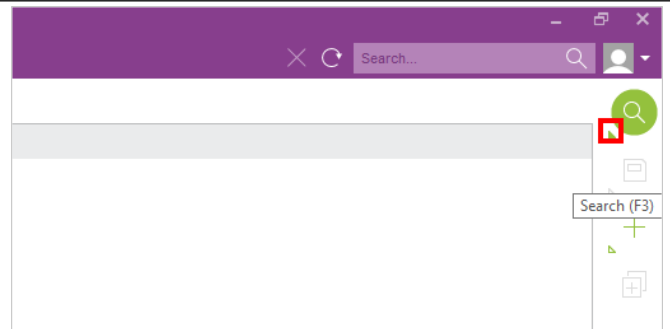
Click on the button **Yes**.
You may also press **Alt+Y**.



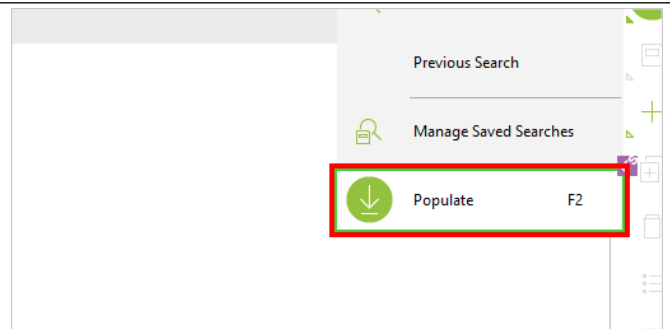
Navigate to **Application Base Setup, General Data, Coordinators**.



Click on the menu item drop down **Search**.



Click on the menu item **Populate**.
You may also press **F2**.



Click on the column **Coordinator ID** with the value **UK_DEMO11**.

Coordinator ID	Name
DEDEMO07	Harald Hess
NILEFR	Nicolas Leclercq
GIBOFR	Gilles Bourquard
UK_DEMO11	Janet Apollo (11)
DEDEMO09	Jürgen Falter
ALAIN	Alain Prost
ALEX	Alexander Daniel
DAVID	David Coulthard

Click on the input field **File name:**.
You may also press **ALT+N**.

Enter **File name:**.

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

12.2.3. Create purchase order

Click on the button **New**.
You may also press **Alt+N**.

Name	User	Replayed
Windows UIA		
Word 2013 document sample	Michael Olsen	
Microsoft CRM		
CRM 2015 Testing create new account	Michael Olsen	09-11-2015 09:00
Microsoft Dynamics NAV Web		

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Click on the list element **IFS Apps 9**.

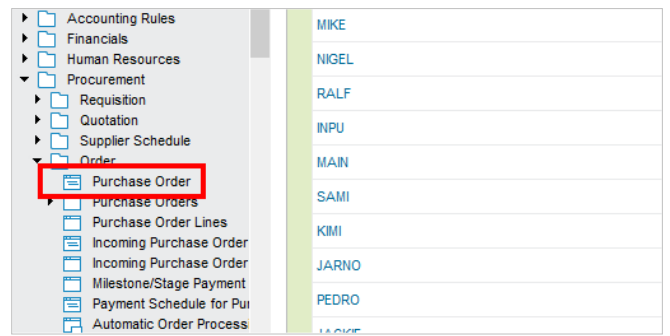
Click on the button **Record**.
You may also press **Alt+R**.

Click on the radio button **English (United States)**.

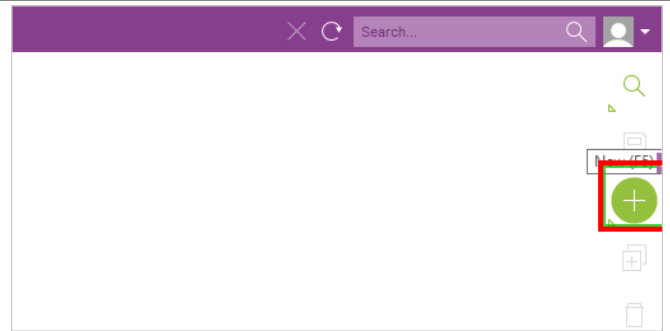
Click on the button **Ok**.
You may also press **Alt+O**.

Click on the button **Yes**.
You may also press **Alt+Y**.

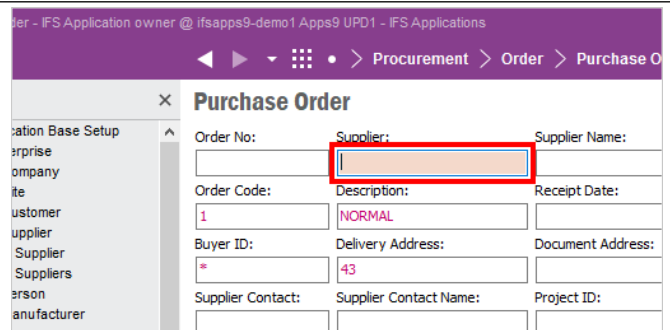
Navigate to **Procurement, Order, Purchase Order**.



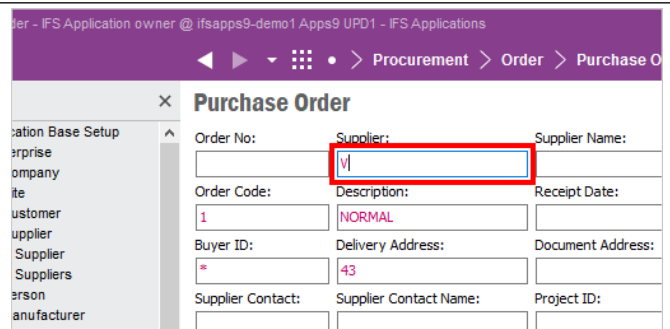
Click on the tool strip item **New**.
You may also press **F5**.



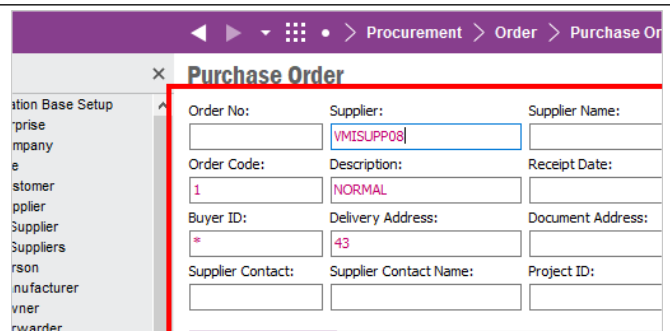
Click on the data field **Supplier**.



Enter **Supplier**.

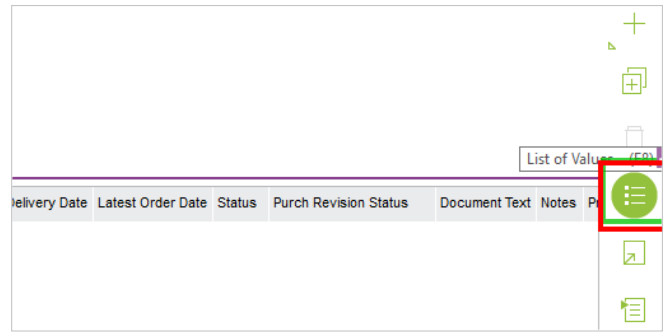


Click on the background of the form.

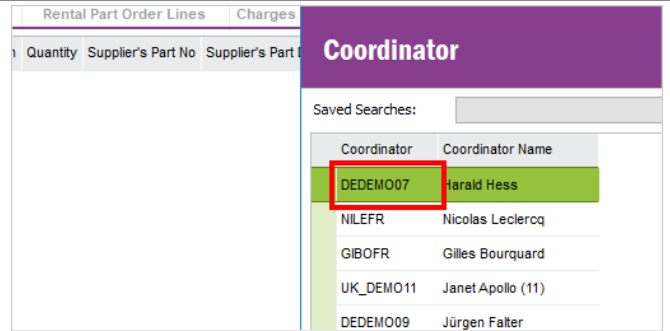


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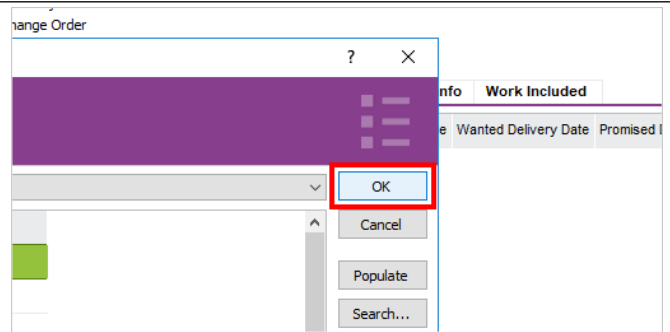
Click on the button **List of Values**.



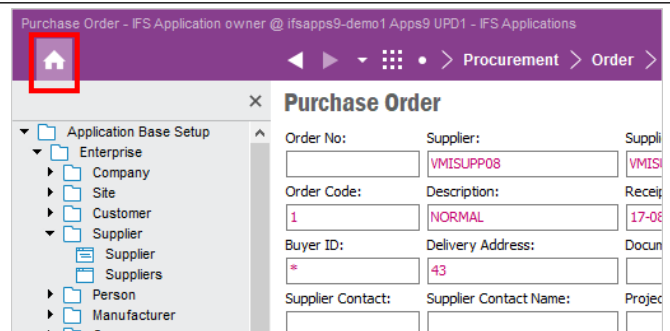
Click on the column **Coordinator** with the value **DEDEMO07**.



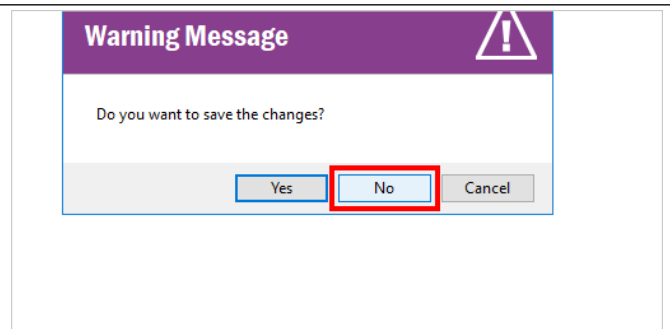
Click on the push button **OK**.



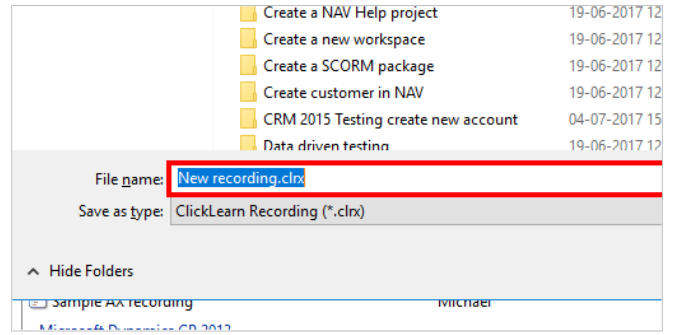
Click on the tool strip item **Home**.
You may also press **Alt + Home**.



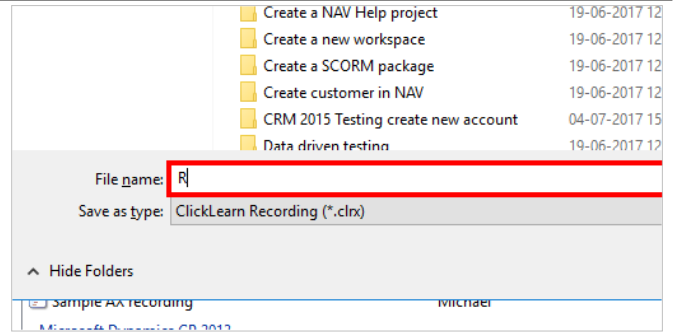
Click on the button **No**.



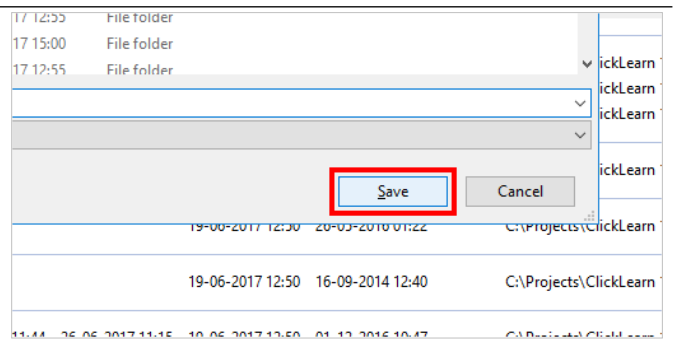
Click on the input field **File name:**.
You may also press **ALT+N**.



Enter **File name:**



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

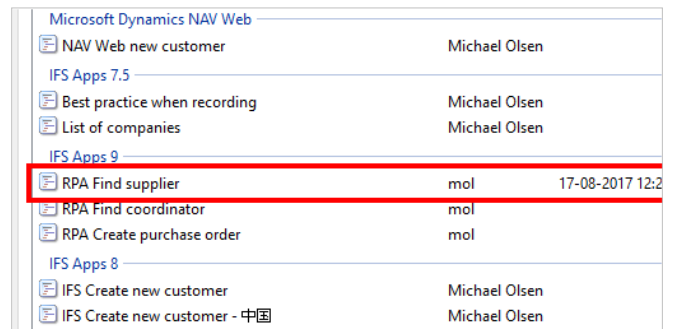


12.3.RPA Set global value on IFS

In order to collect data during a replay you need to modify the recording and make use of the SetGlobalValue command.

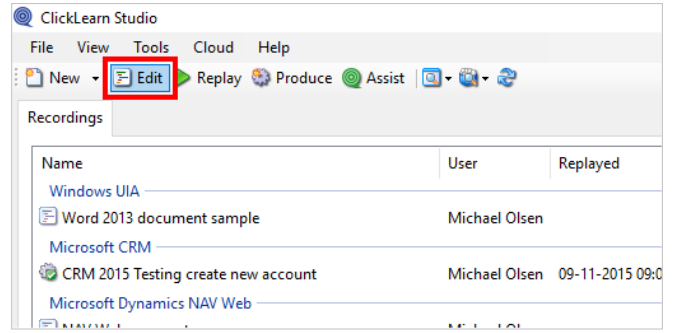
12.3.1. Modify the recordings

Click on the list element **RPA Find supplier**.

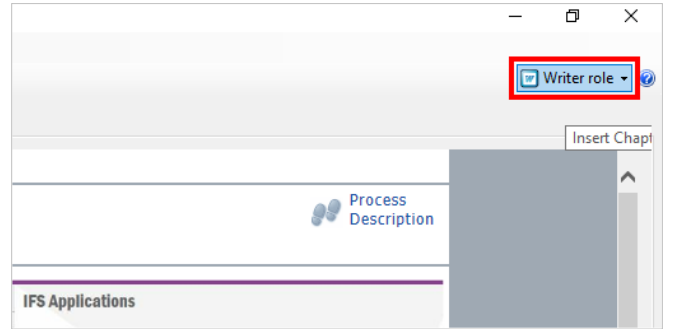


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Click on the button **Edit**.
You may also press **Alt+D**.

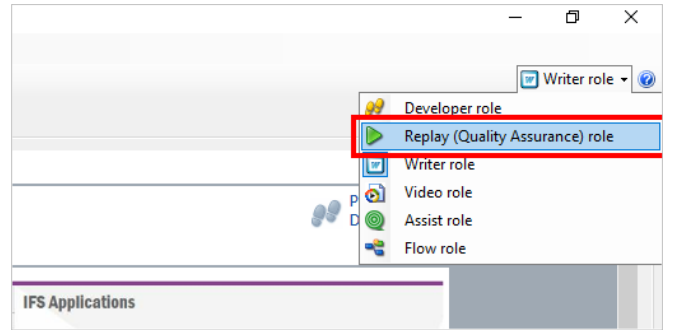


Click on the menu **Writer role**.

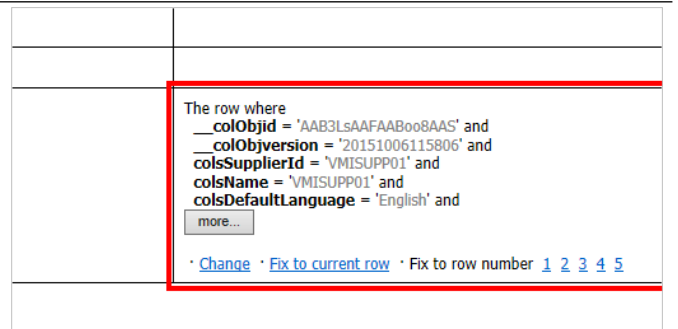


Make sure to change the editor role to the replay role.

Click on the menu **Replay (Quality Assurance) role**.

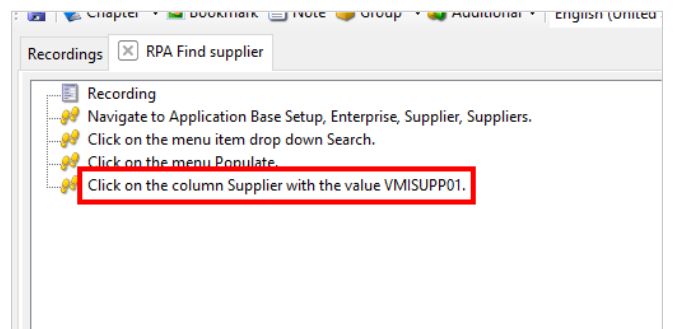


Move the mouse to the Replay data column.

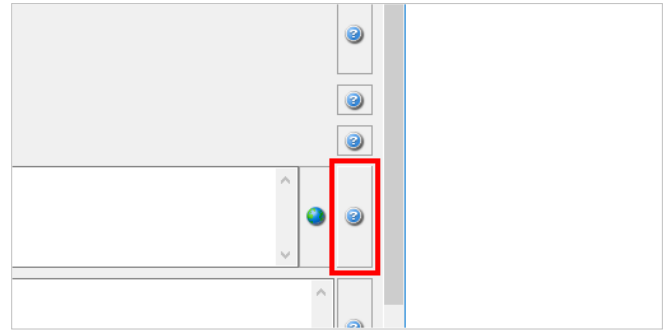


The preview in the replay role will display the steps where data rows has been clicked on. It makes it easier to determine which data you have access to.

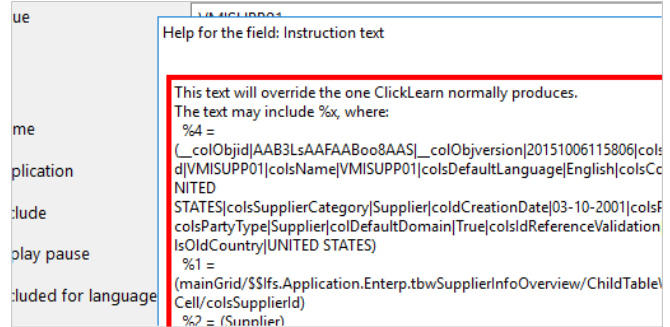
Double click on the folder **Click on the column Supplier with the value VMISUPP01..**



Click on the button **Help**.

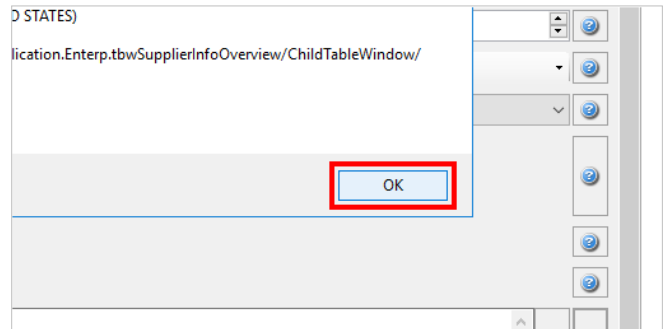


Move the mouse to **the help text**.

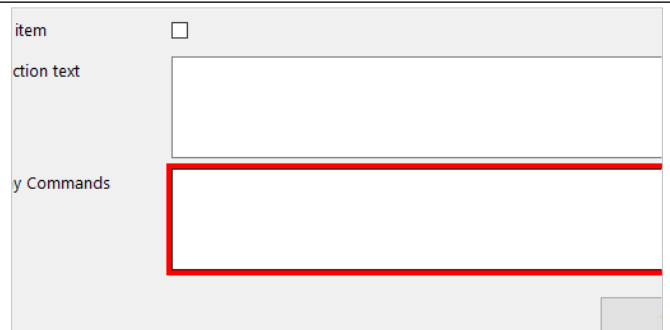


Please notice that a step recorded collects multiple values. Each value is represented by a percent sign followed by a digit or letter. Each of these parameters may be used when we insert the SetGlobalValue command.

Click on the button **OK**.

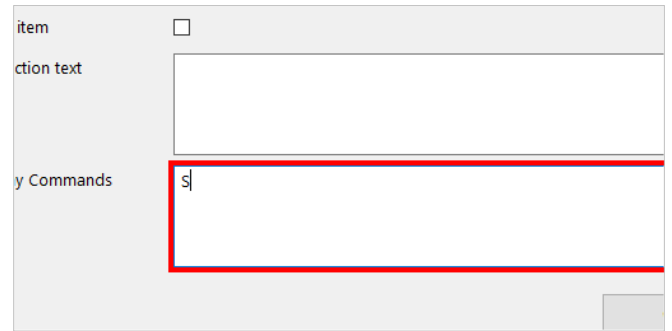


Click on the input field **Replay Commands**.

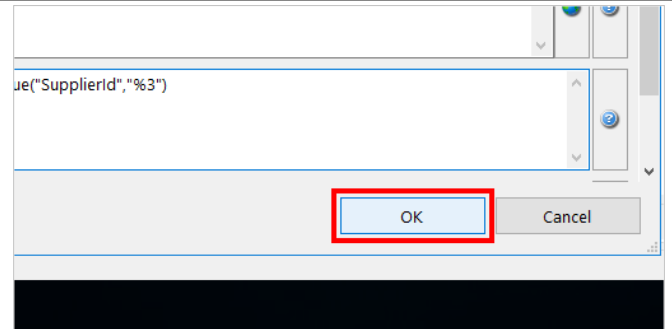


Here we use one or more commands. The SetGlobalValue command has two parameters, first an id and second a value. In this example we will store the parameter %3 which is the value of the column we have clicked on.

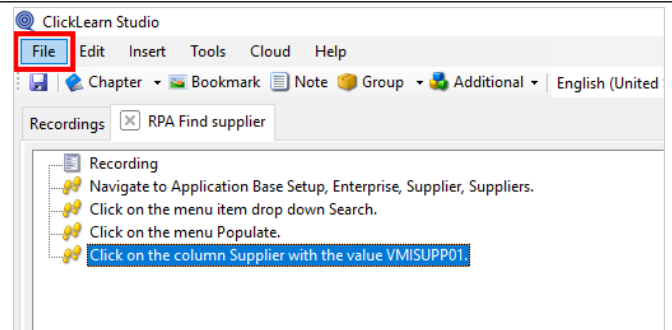
Enter **Replay Commands**. Press the **Enter** key.



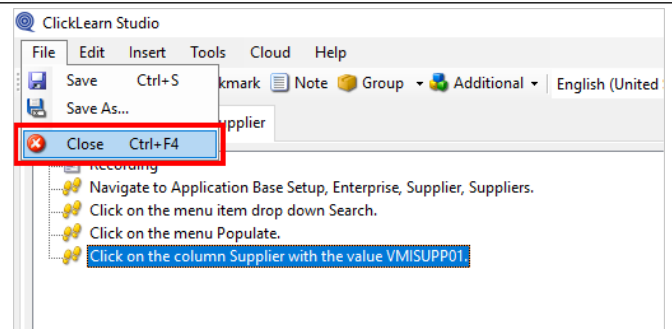
Click on the button **OK**.
You may also press **Alt+O**.



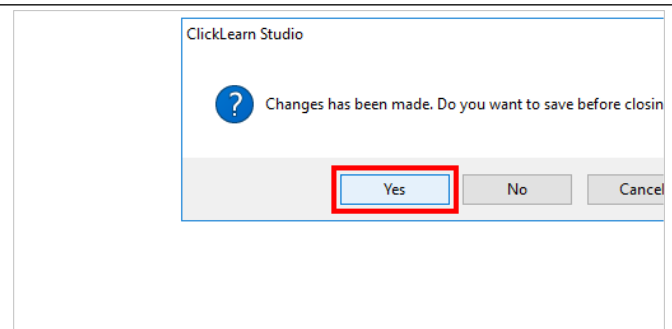
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



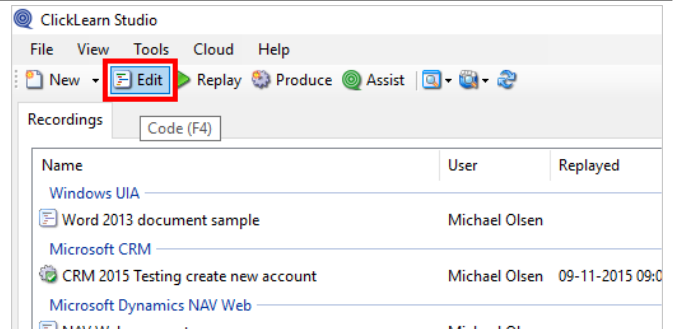
Click on the button **Yes**.
You may also press **Alt+Y**.



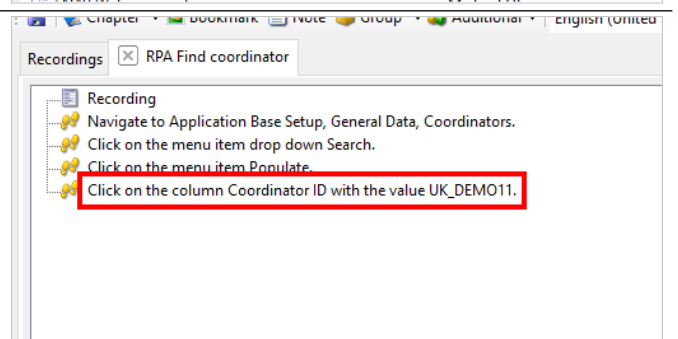
Click on the list element **RPA Find coordinator**.

NAV Web new customer	Michael Olsen
IFS Apps 7.5	
Best practice when recording	Michael Olsen
List of companies	Michael Olsen
IFS Apps 9	
RPA Find supplier	mol 17-08-2017 12:2
RPA Find coordinator	mol
RPA Create purchase order	mol
IFS Apps 8	
IFS Create new customer	Michael Olsen
IFS Create new customer - 中国	Michael Olsen
List of companies v8	Michael Olsen

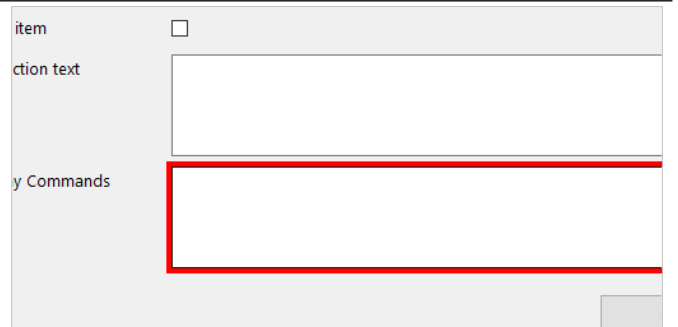
Click on the button **Edit**.
You may also press **Alt+D**.



Double click on the folder **Click on the column Coordinator ID with the value UK_DEMO11..**

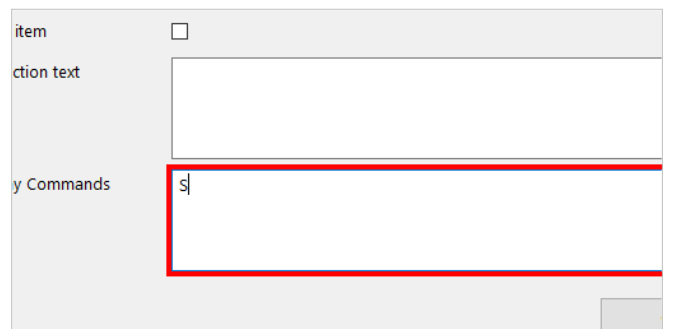


Click on the input field **Replay Commands**.

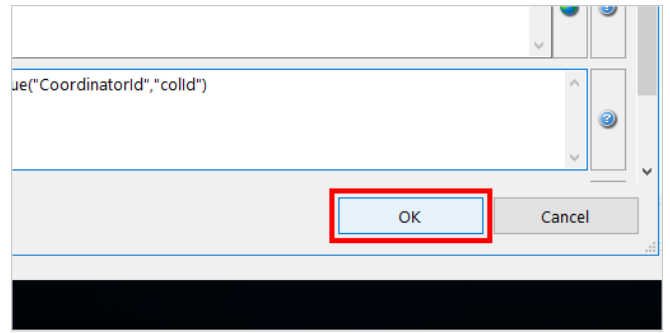


In this example we will collect the value from the data row using a reference to the column name. This allows to get a column value apart from the column we have clicked and it doesn't even need to be visible.

Enter **Replay Commands**. Press the **Enter** key.



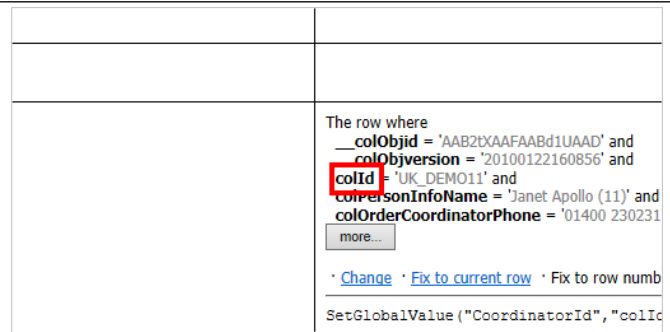
Click on the button **OK**.
You may also press **Alt+O**.



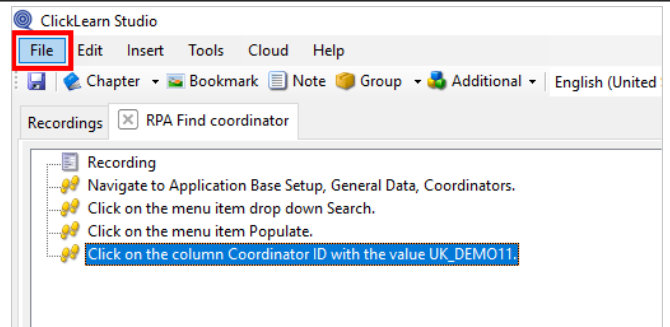
Move the mouse to this area.



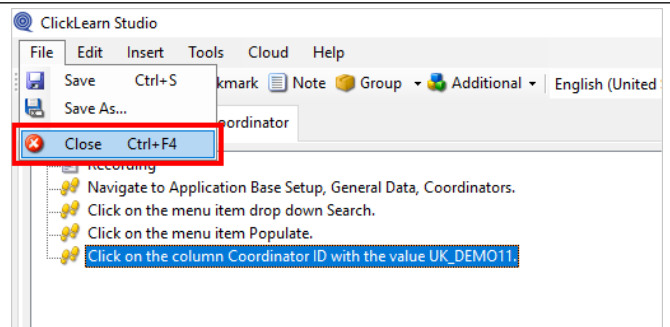
Move the mouse to **colId**
Here you can see the column name we used in the
reply command SetGlobalValue.



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

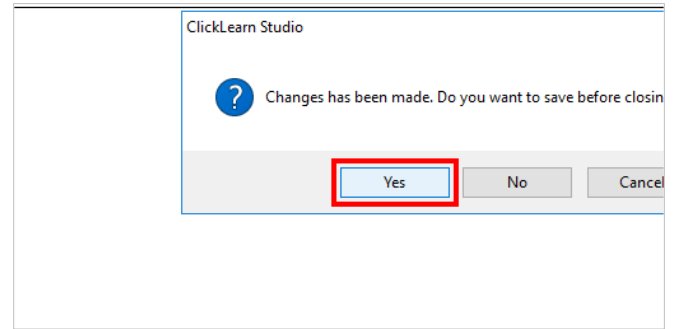


Click on the menu **Close**.



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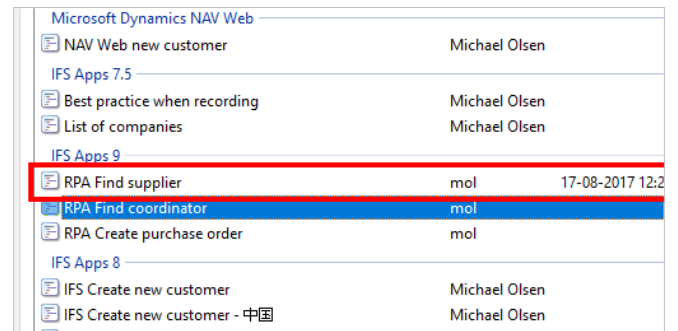
Click on the button **Yes**.
You may also press **Alt+Y**.



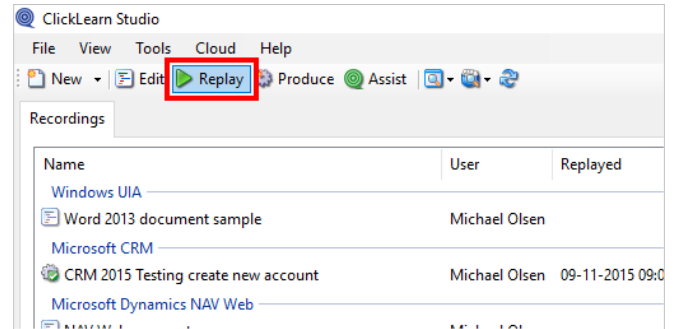
The two recordings have now been modified to collect data and is ready to be replayed.

12.3.2. Replay the recordings

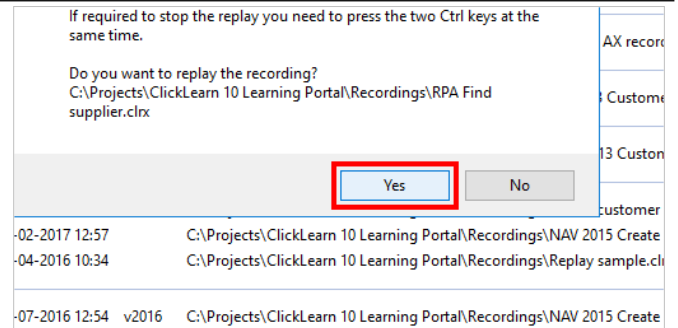
Click on the list element **RPA Find supplier**.



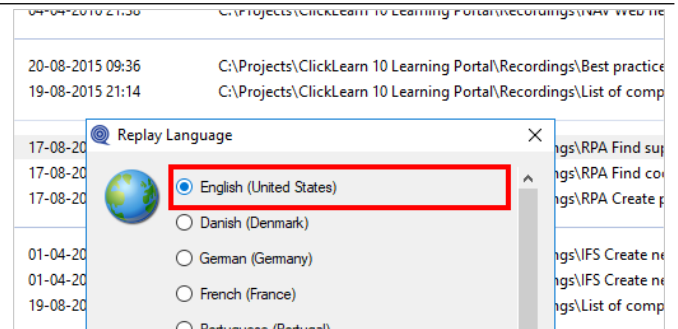
Click on the button **Replay**.
You may also press **Alt+R**.



Click on the button **Yes**.
You may also press **Alt+Y**.

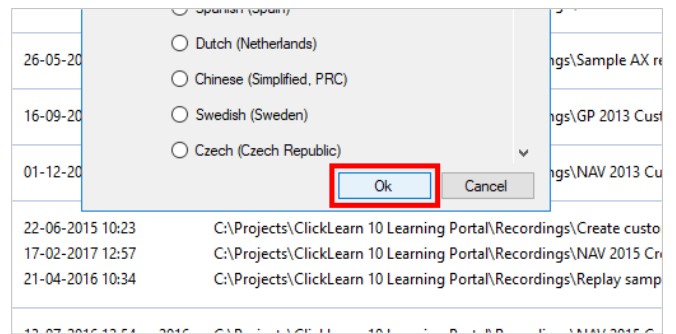


Click on the radio button **English (United States)**.



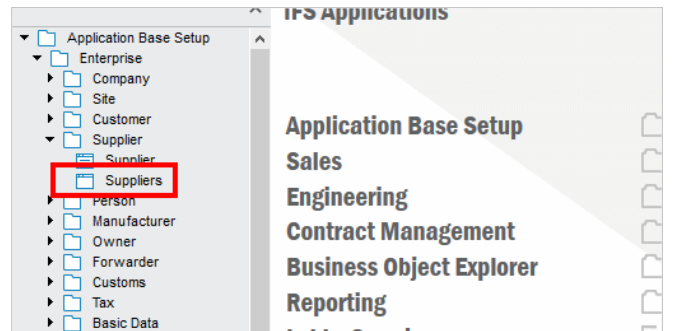
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Click on the button **Ok**.
You may also press **Alt+O**.

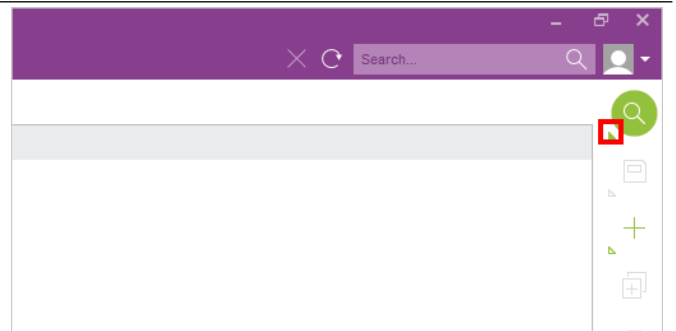


The replay will now automatically perform the steps to find a supplier.

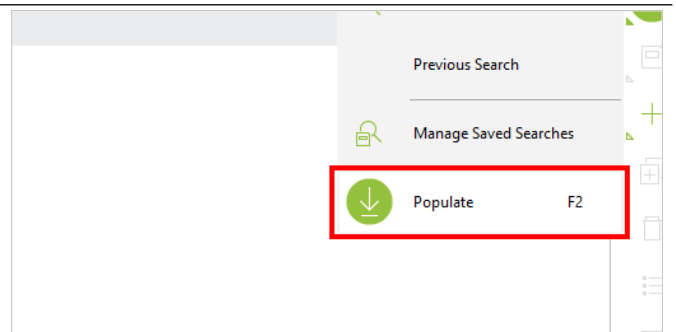
Navigate to **Application Base Setup, Enterprise, Supplier, Suppliers**.



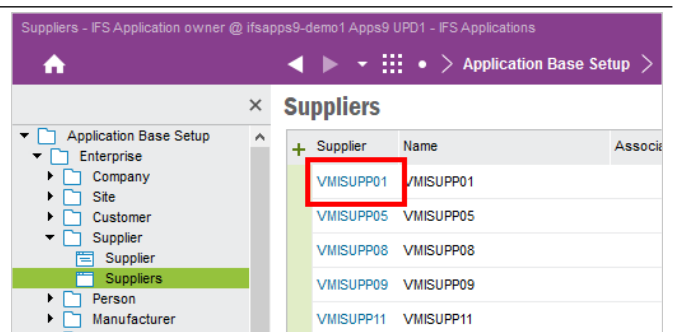
Click on the menu item drop down **Search**.



Click on the menu item **Populate**.
You may also press **F2**.

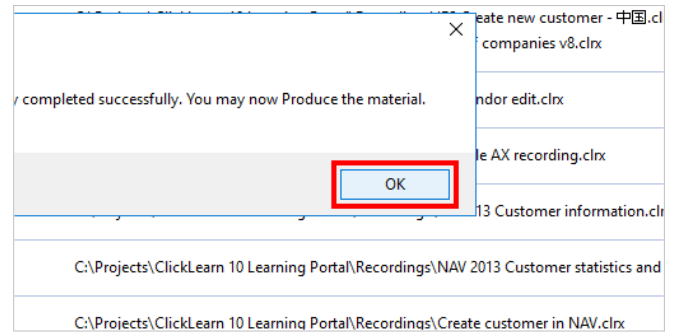


Click on the column **Supplier** with the value **VMISUPP01**.

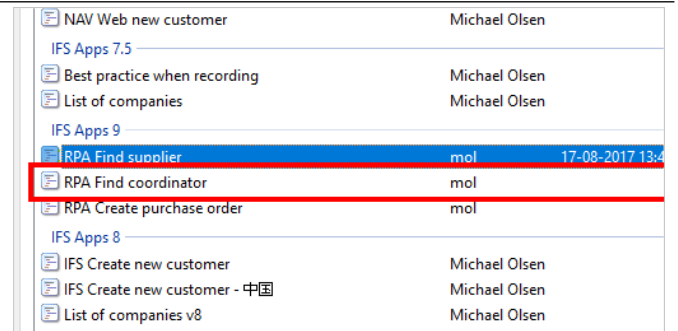


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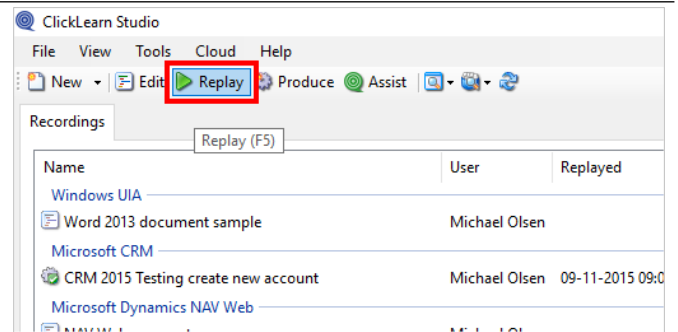
Click on the button **OK**.



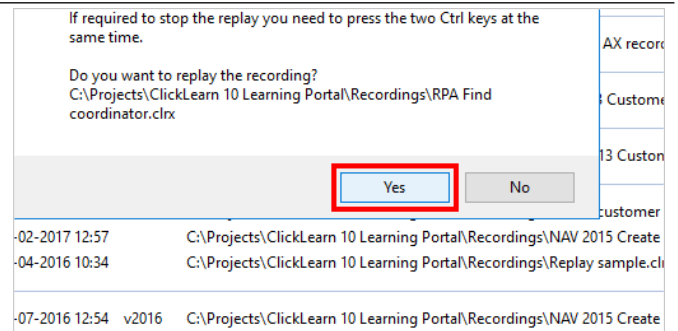
Click on the list element **RPA Find coordinator**.



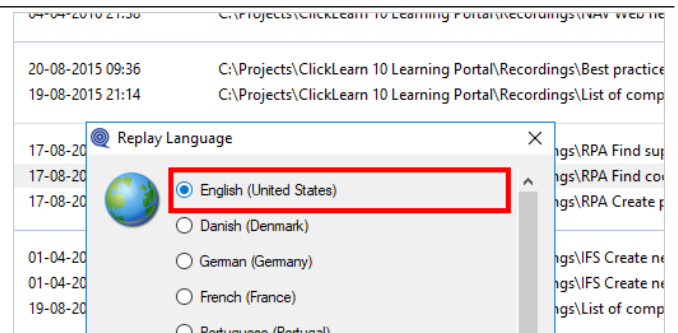
Click on the button **Replay**.
You may also press **Alt+R**.



Click on the button **Yes**.
You may also press **Alt+Y**.

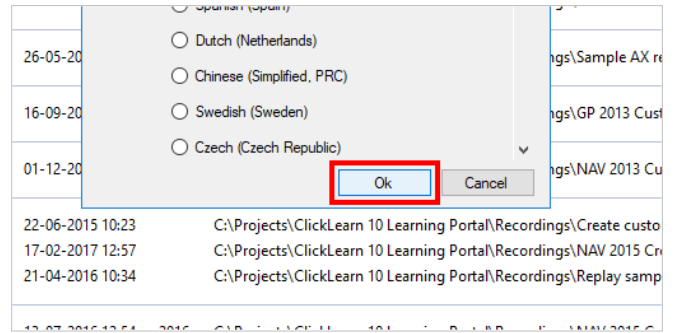


Click on the radio button **English (United States)**.



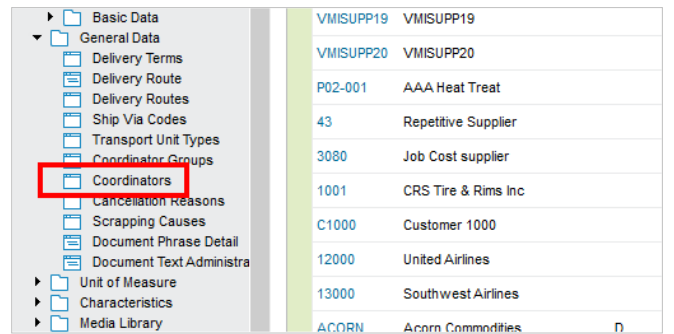
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Click on the button **Ok**.
You may also press **Alt+O**.

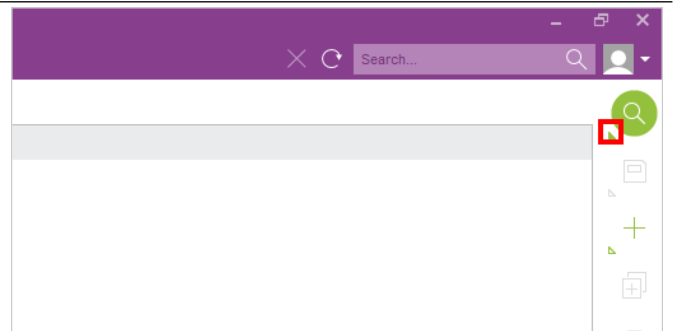


The replay will now automatically perform the steps to find a coordinator.

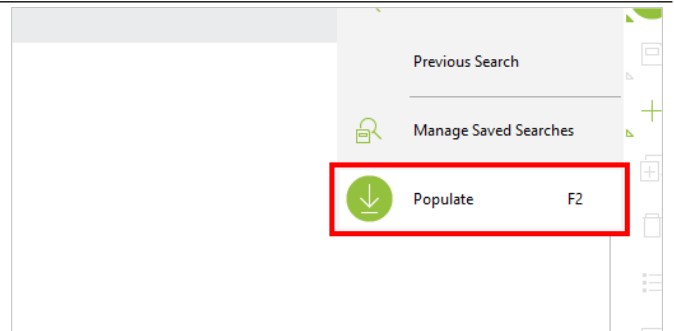
Navigate to **Application Base Setup, General Data, Coordinators**.



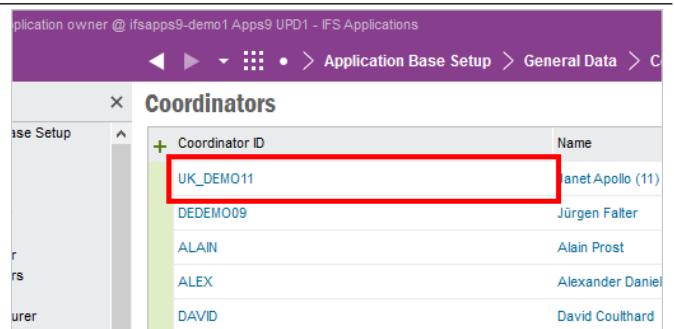
Click on the menu item drop down **Search**.



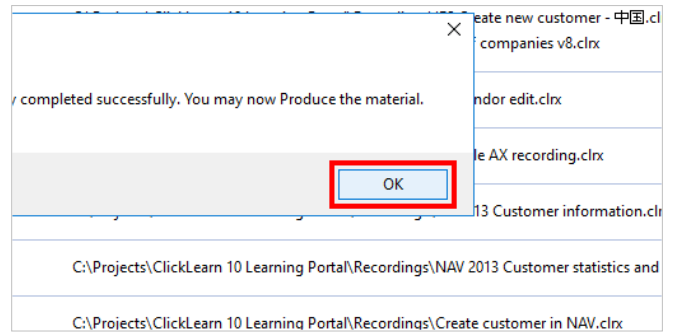
Click on the menu item **Populate**.
You may also press **F2**.



Click on the column **Coordinator ID** with the value **UK_DEMO11**.



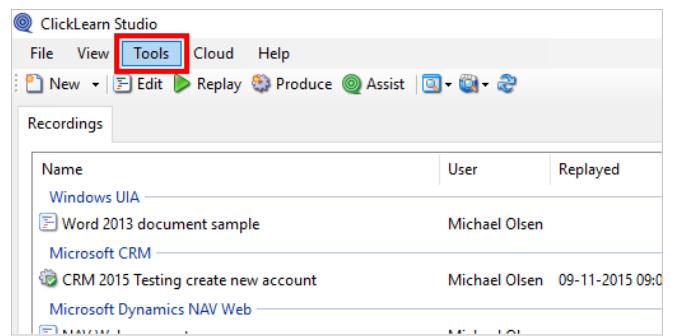
Click on the button **OK**.



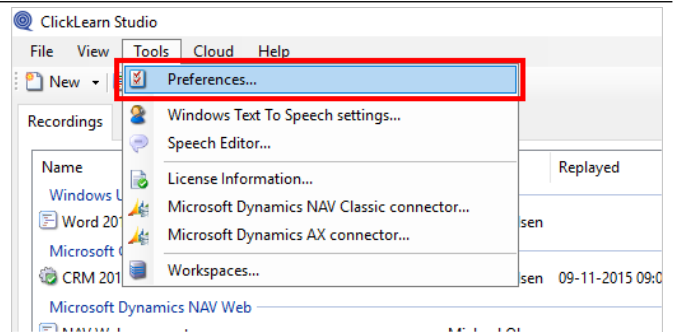
The replay phase is complete and the data collected has been stored.

12.3.3. Review global replay data

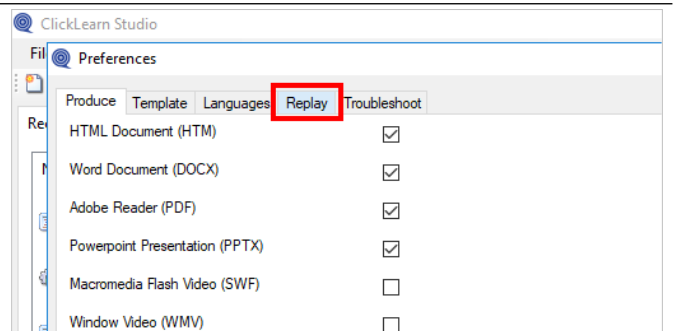
Click on the menu **Tools**.



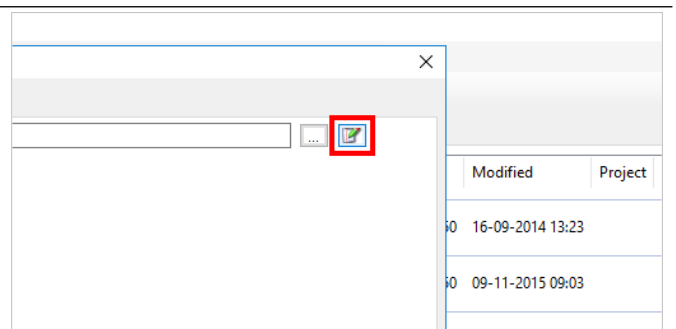
Click on the menu **Preferences...**



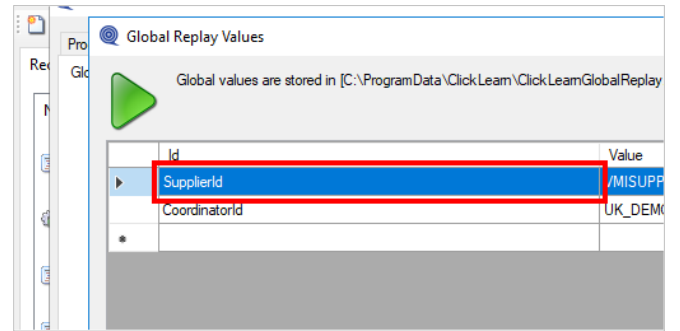
Click on the tab **Replay**.



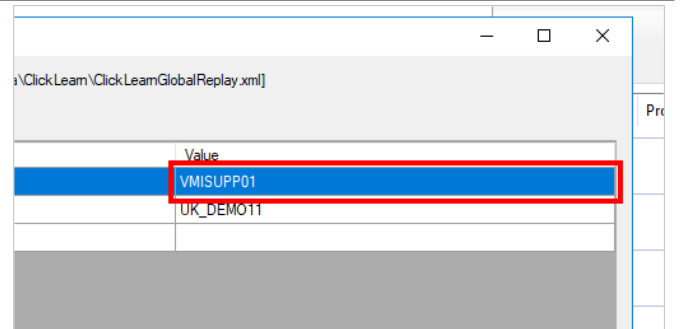
Click on the button **Edit**.



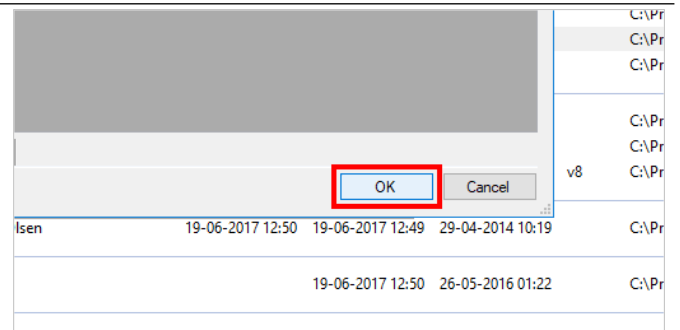
Move the mouse to **Id**.



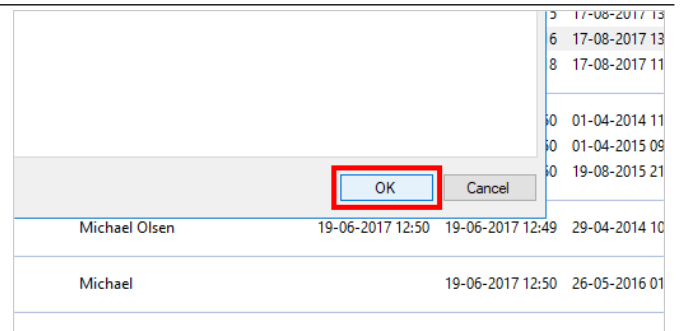
Move the mouse to **Value**.



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



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



12.4.RPA Get global value on IFS

In order to use the global data during a replay you need to modify the recording and make use of the GetGlobalValue command.

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12.4.1. Modify the recording

Click on the list element **RPA Create purchase order**.

IFS Apps 7.5			
Best practice when recording		Michael Olsen	
List of companies		Michael Olsen	
IFS Apps 9			
RPA Find supplier	mol		17-08-2017 13:4
RPA Find coordinator	mol		17-08-2017 13:4
RPA Create purchase order	mol		
IFS Apps 8			
IFS Create new customer		Michael Olsen	
IFS Create new customer - 中国		Michael Olsen	
List of companies v8		Michael Olsen	
Microsoft Dynamics AX 2012 R2			

Click on the button **Edit**.
You may also press **Alt+D**.

ClickLearn Studio

File View Tools Cloud Help

New Edit Replay Produce Assist

Recordings

Name	User	Replayed
Windows UIA		
Word 2013 document sample	Michael Olsen	
Microsoft CRM		
CRM 2015 Testing create new account	Michael Olsen	09-11-2015 09:0
Microsoft Dynamics NAV Web		

Click on the menu **Replay (Quality Assurance) role**.

Replay (Quality Assurance) role

Replay Data

Make sure to change the editor role to the replay role.

Click on the menu **Replay (Quality Assurance) role**.

Replay (Quality Assurance) role

- Developer role
- Replay (Quality Assurance) role
- Writer role
- Video role
- Assist role
- Flow role

Replay Data

Click on the link **VMISUPP08**

	VMISUPP08
	The row where

Click on the input field **Keystrokes as text**.

iew
the text VMISUPP08.

Keystrokes as text: VMISUPP08

to insert instead of...

de

by pause 0

Press **CTRL+a**.

iew
the text VMISUPP08.

Keystrokes as text: VMISUPP08

to insert instead of...

de

by pause 0

The GetGlobalValue command has one parameter, an id. In this example we will get the value stored by the id SupplierId.

Enter **Keystrokes as text**.

iew
the text G.

Keystrokes as text: G

to insert instead of...

de

by pause 0

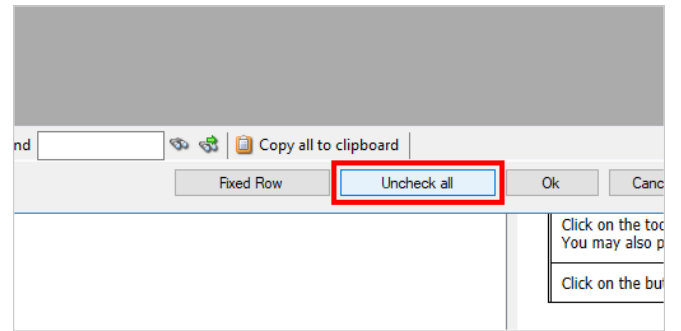
Click on the button **OK**.
You may also press **Alt+O**.

OK Cancel

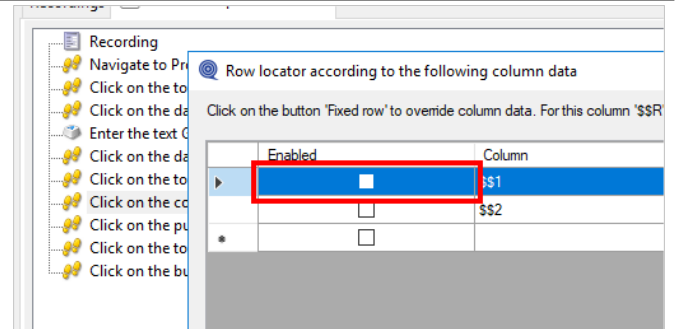
Click on the link **Change**

	The row where column number 1 = 'DEDEMO07' and column number 2 = 'Harald Hess' Change · Fix to current row · Fix to row number

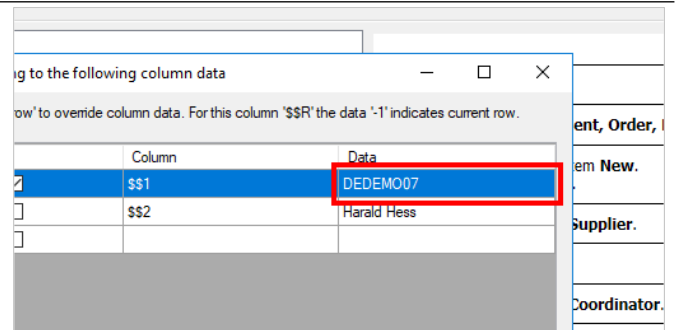
Click on the button **Uncheck all**.
You may also press **Alt+U**.



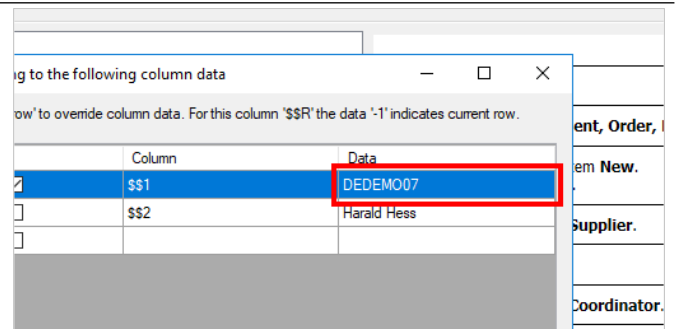
Click on **Enabled**.



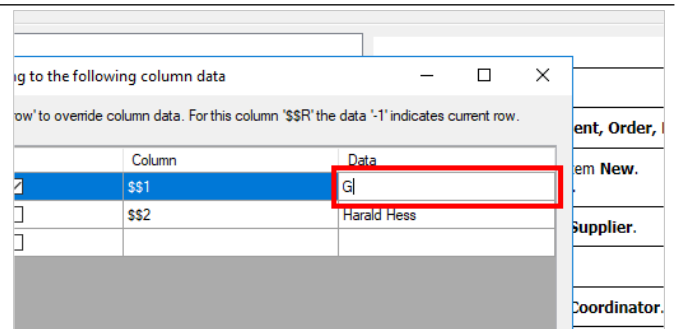
Click on **Data**.



Click on **Data**.

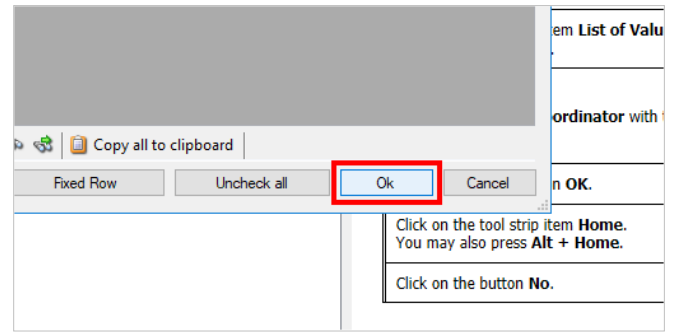


Enter **Data**.

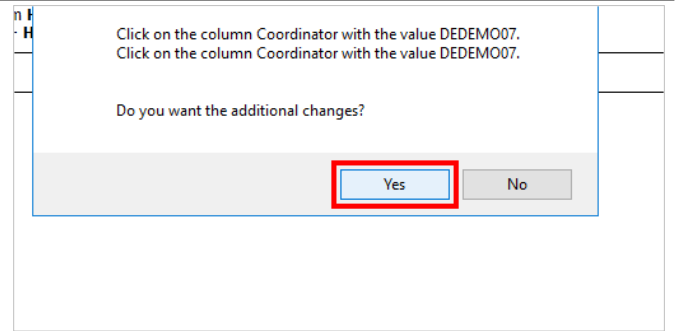


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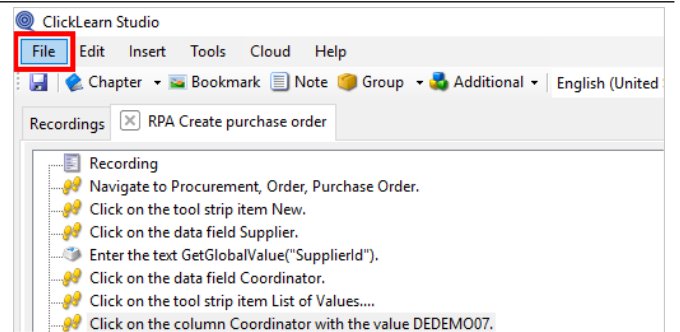
Click on the button **Ok**.
You may also press **Alt+O**.



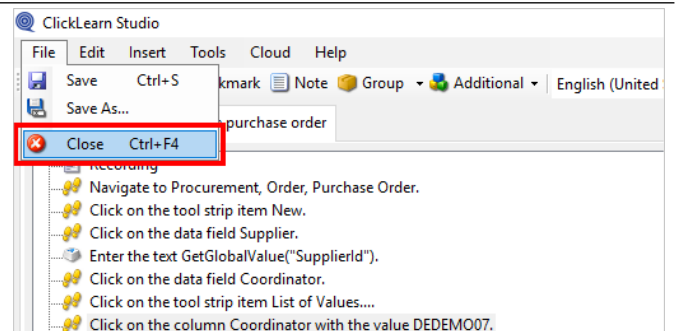
Click on the button **Yes**.
You may also press **Alt+Y**.



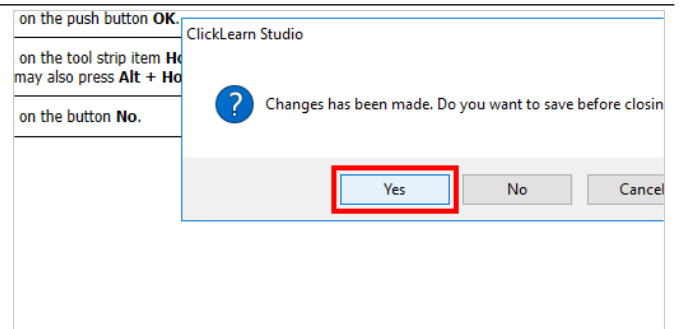
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



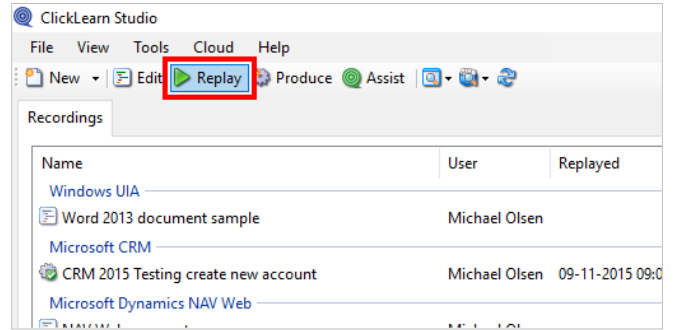
Click on the button **Yes**.
You may also press **Alt+Y**.



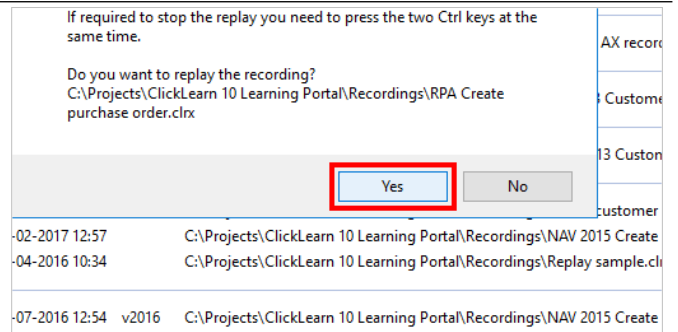
The recording have now been modified to get the global data and is ready to be replayed.

12.4.2. Replay the recording

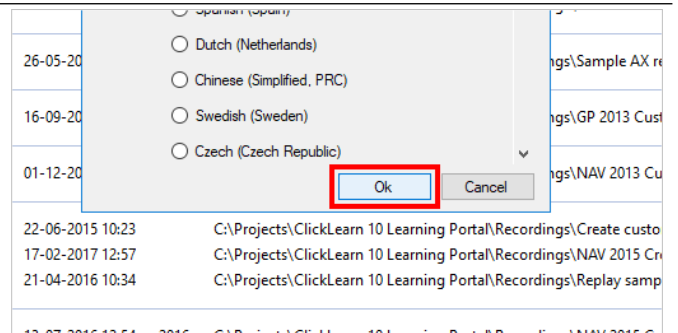
Click on the button **Replay**.
You may also press **Alt+R**.



Click on the button **Yes**.
You may also press **Alt+Y**.

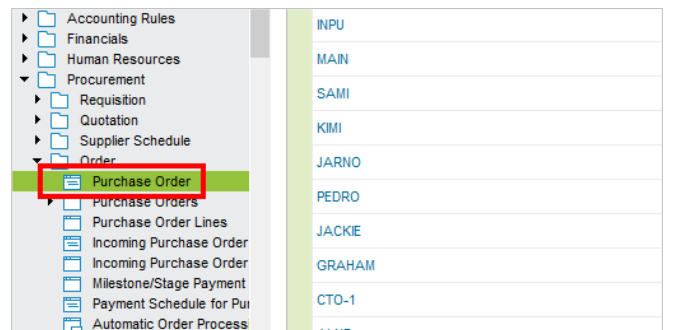


Click on the button **Ok**.
You may also press **Alt+O**.

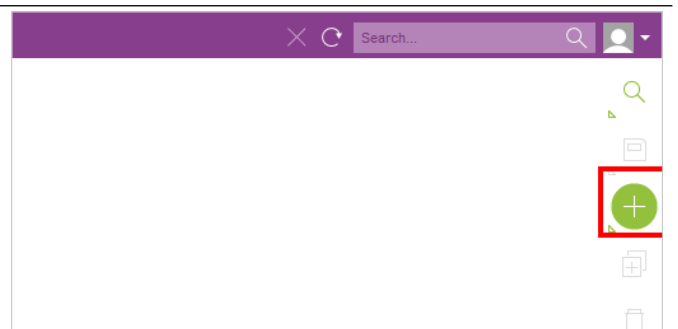


The replay will now automatically perform the steps to create a new purchase order.

Navigate to **Procurement, Order, Purchase Order**.



Click on the tool strip item **New**.
You may also press **F5**.



Click on the data field **Supplier**.

The screenshot shows the 'Purchase Order' form in a web application. The 'Supplier' field is highlighted with a red box. Other fields include Order No., Order Code (1), Buyer ID (*), and Supplier Contact (43).

Enter **Supplier**.

The screenshot shows the 'Purchase Order' form with 'VM' entered in the 'Supplier' field, which is highlighted with a red box.

Click on the data field **Coordinator**.

The screenshot shows the 'Purchase Order' form with the 'Coordinator' field highlighted in red. The field contains an asterisk (*). Other fields include Supplier Name, Site (43), and various checkboxes for order status.

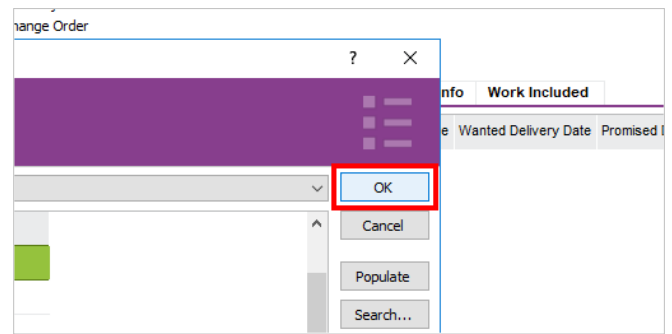
Click on the tool strip item **List of Values....**
You may also press **F8**.

The screenshot shows the tool strip of the application. The 'List of Values' icon (three horizontal lines) is highlighted with a red box.

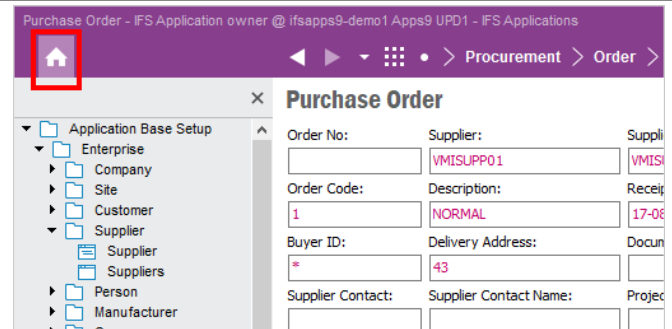
Click on the column **Coordinator** with the value **UK_DEMO11**.

The screenshot shows the 'Coordinator' list of values. The 'Coordinator' column has 'UK_DEMO11' selected and highlighted with a red box. Other coordinators listed include DEDEMO09, ALAIN, ALEX, and DAVID.

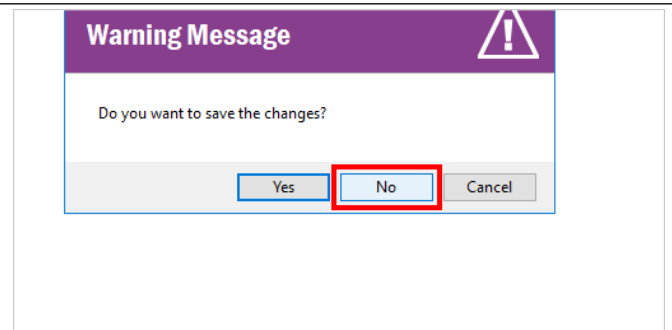
Click on the push button **OK**.



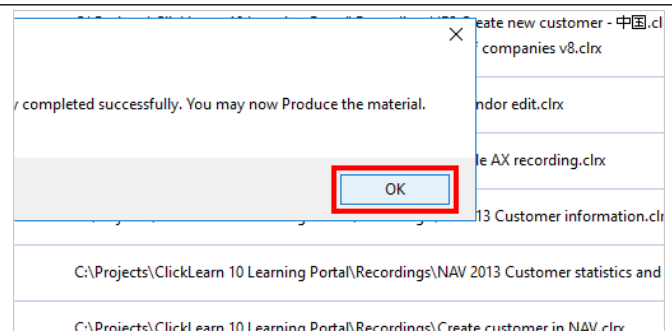
Click on the tool strip item **Home**.
You may also press **Alt + Home**.



Click on the button **No**.



Click on the button **OK**.



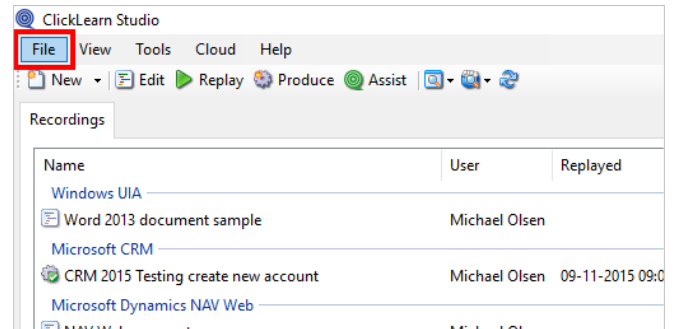
12.5.RPA Sample replay on IFS

To batch replay multiple recordings you need to create a book or shelf.

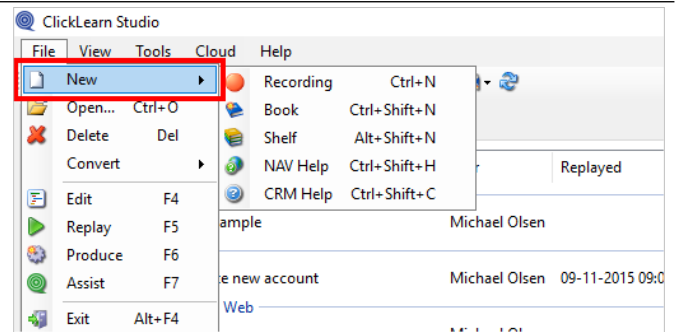
In this example we will create a book.

12.5.1. Create a batch replay book

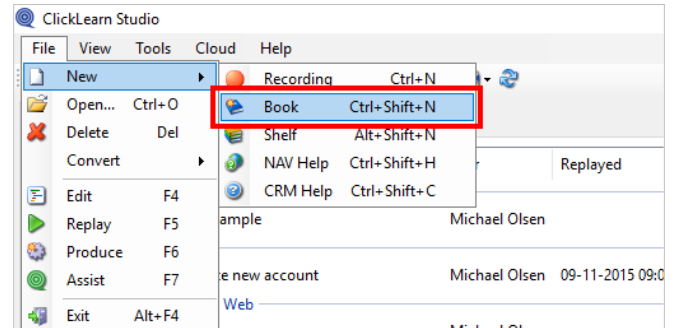
Click on the menu **File**.
You may also press **Alt+F**.



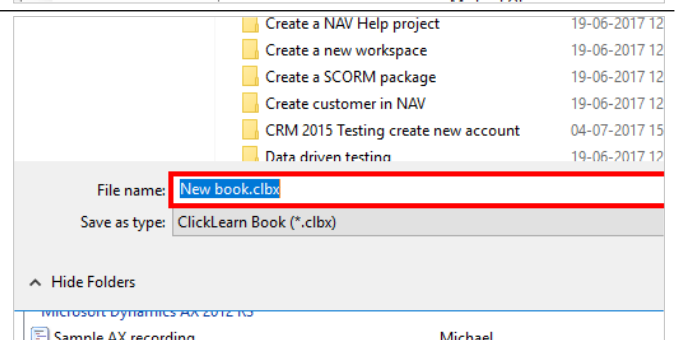
Click on the menu **New**.



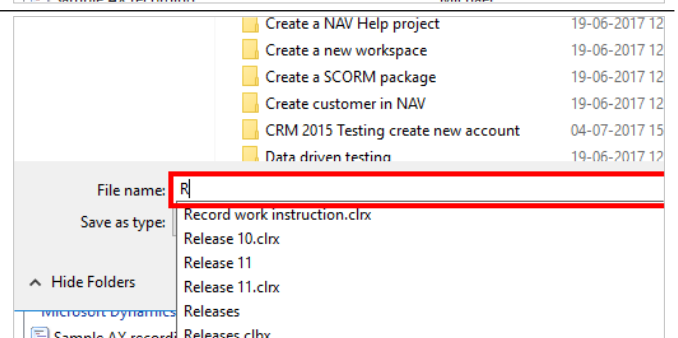
Click on the menu **Book**.



Click on the input field **File name:**.
You may also press **ALT+N**.

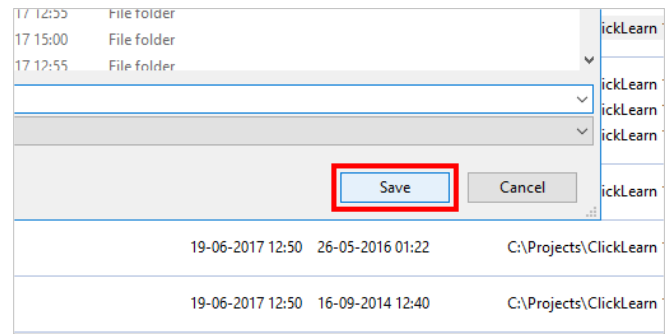


Enter **File name:**.

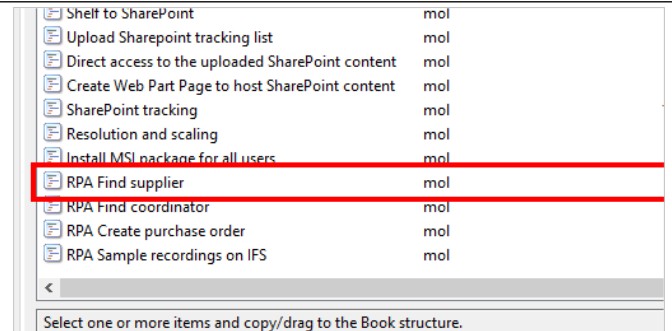


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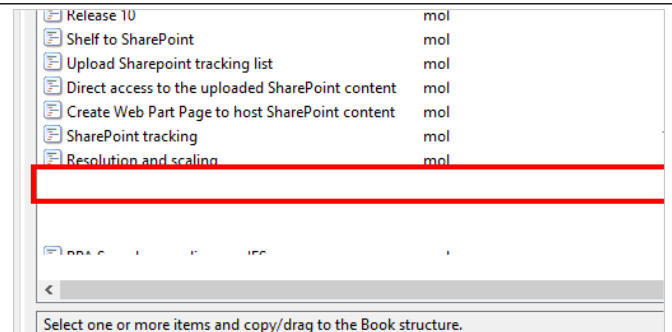
Click on the button **Save**.
You may also press **Alt+S**.



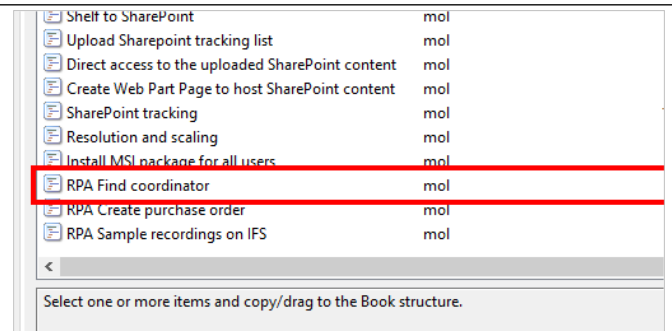
Click on the list element **RPA Find supplier**.



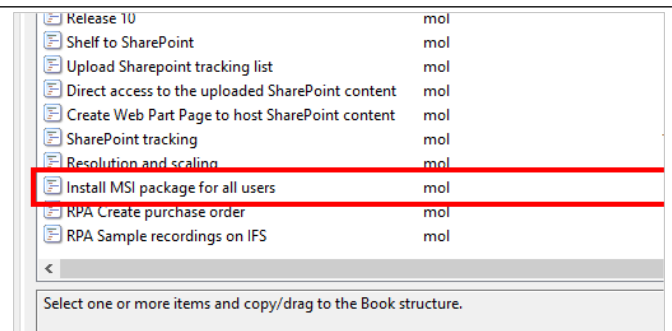
Press **CTRL+c**.



Click on the list element **RPA Find coordinator**.

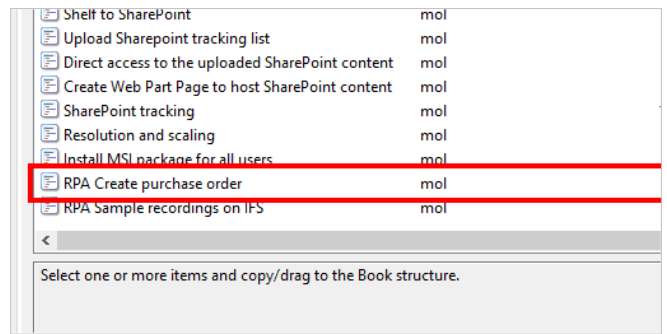


Enter **RPA Find coordinator**.

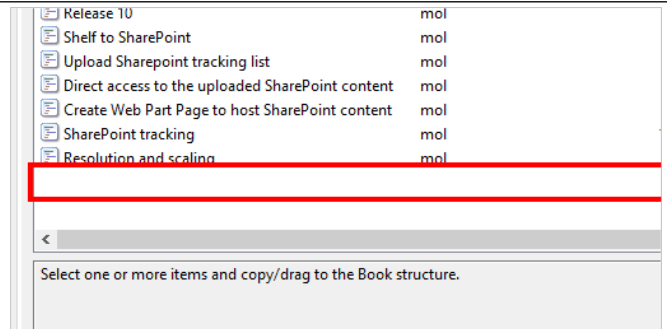


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Click on the list element **RPA Create purchase order**.

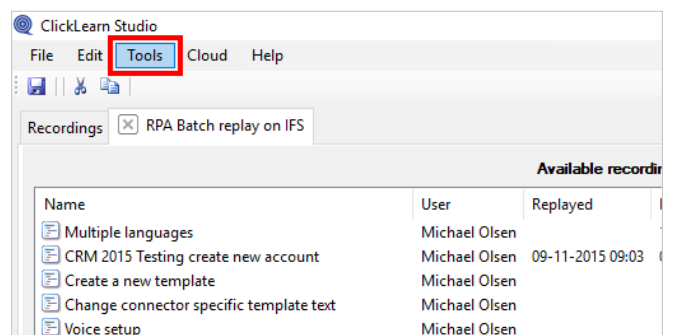


Press **CTRL+c**.

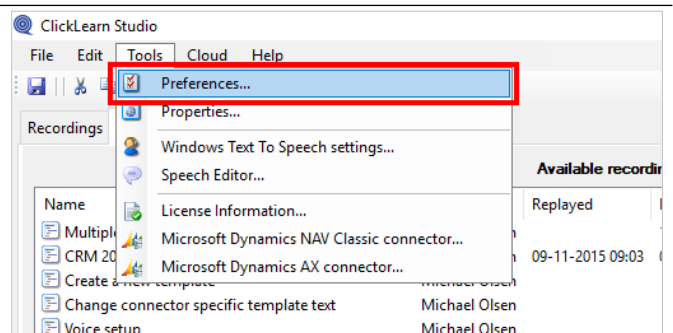


12.5.2. Book replay settings

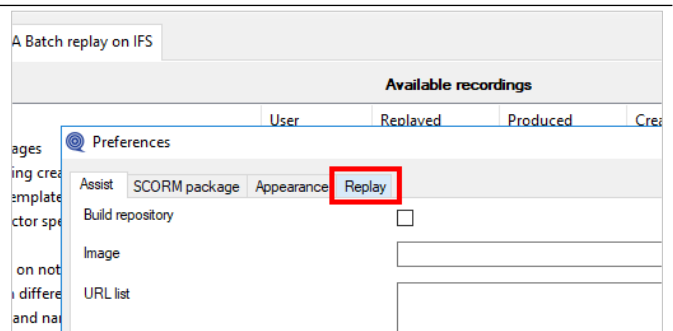
Click on the menu **Tools**.



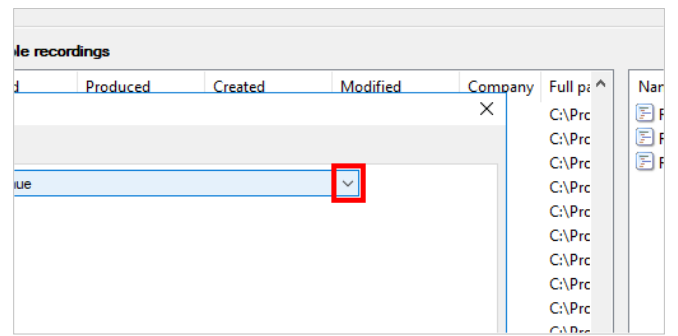
Click on the menu **Preferences...**



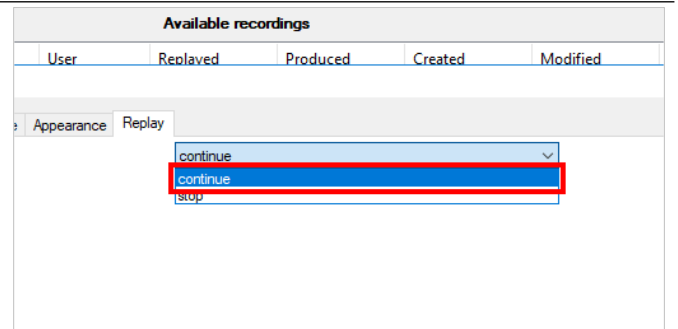
Click on the tab **Replay**.



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

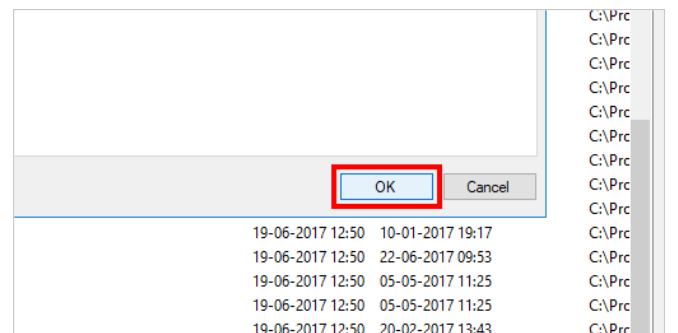


Click on the list element **continue**.

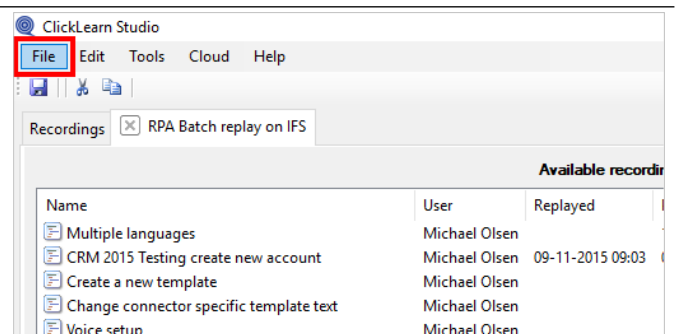


If you want the entire book replay to fail when a recordings fails, please select the option stop instead.

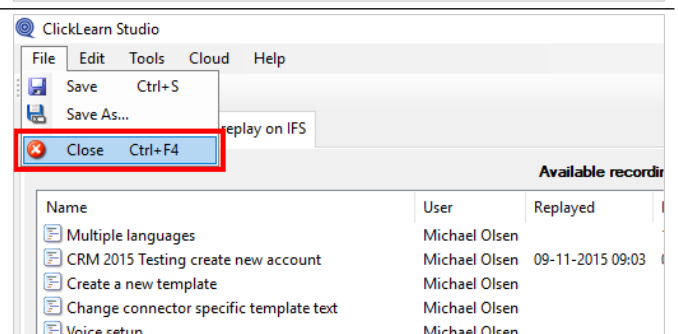
Click on the button **OK**.
You may also press **Alt+O**.



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

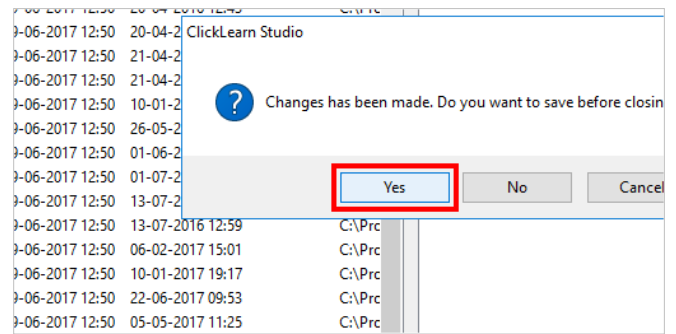


Click on the menu **Close**.



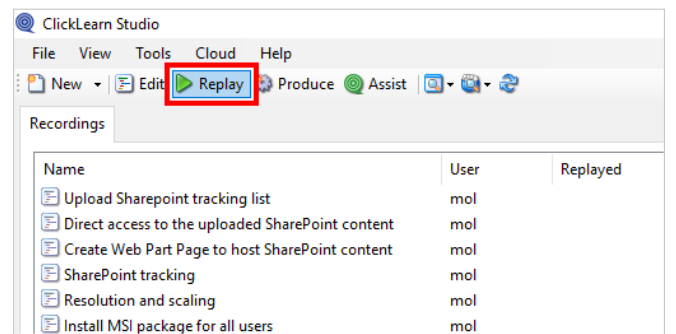
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Click on the button **Yes**.
You may also press **Alt+Y**.

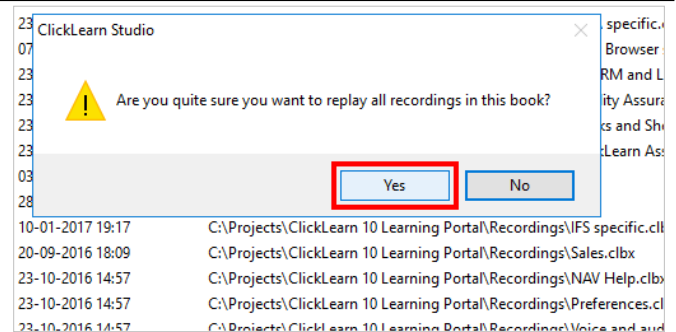


12.5.3. Replay book

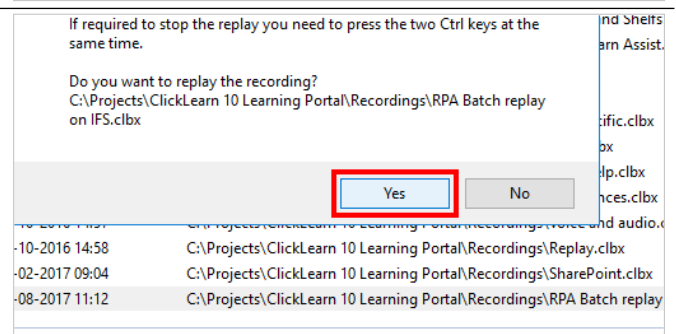
Click on the button **Replay**.
You may also press **Alt+R**.



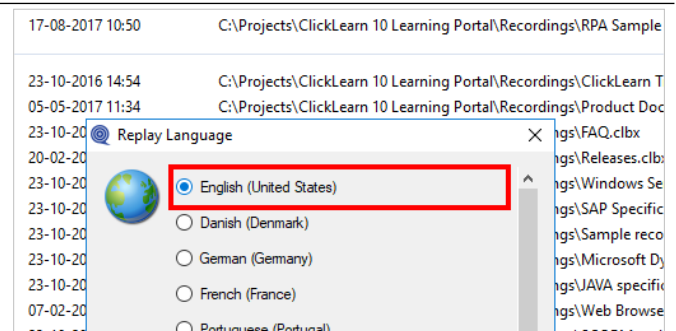
Click on the button **Yes**.
You may also press **Alt+Y**.



Click on the button **Yes**.
You may also press **Alt+Y**.

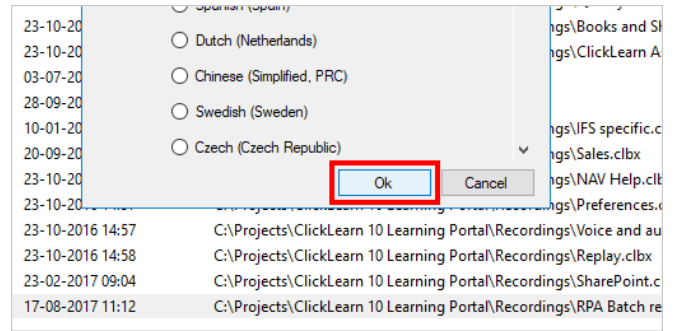


Click on the radio button **English (United States)**.



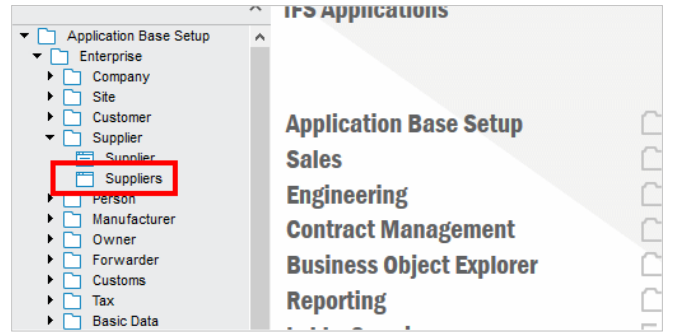
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Click on the button **Ok**.
You may also press **Alt+O**.

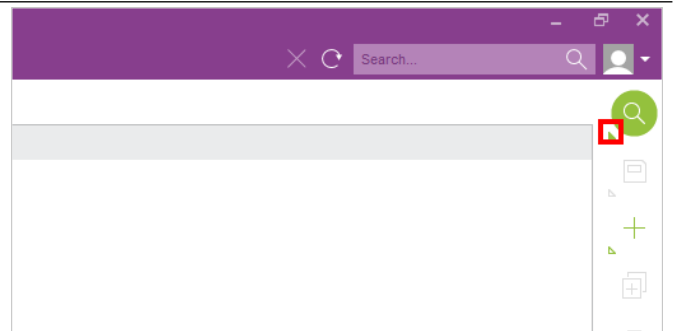


The replay of the book now automatically replays the 3 recordings in the sequence defined in the book.

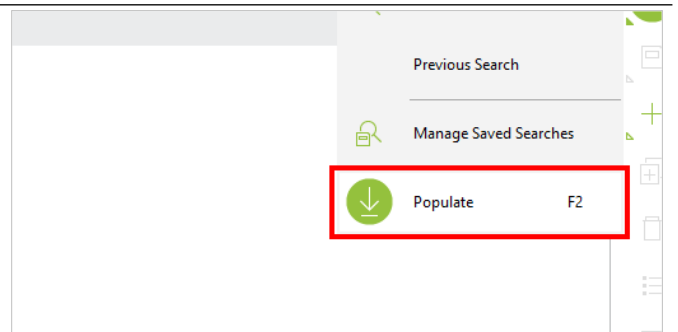
Navigate to **Application Base Setup, Enterprise, Supplier, Suppliers**.



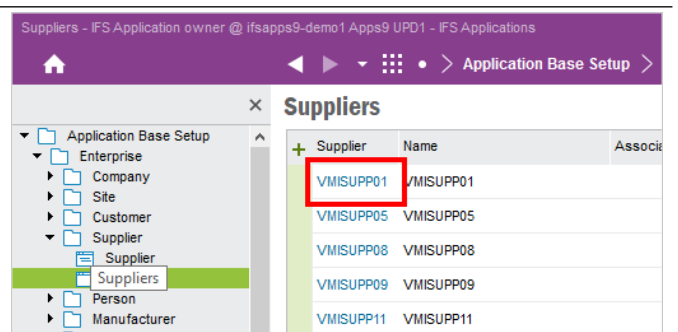
Click on the menu item drop down **Search**.



Click on the menu item **Populate**.
You may also press **F2**.



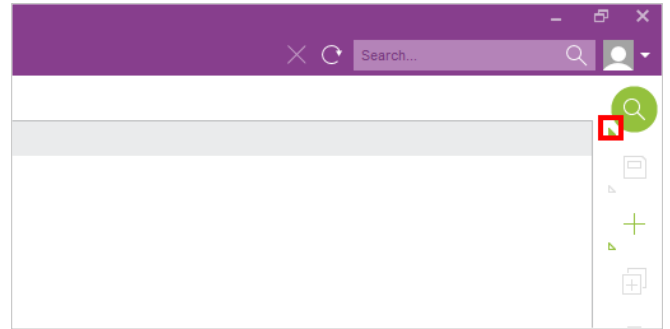
Click on the column **Supplier** with the value **VMISUPP01**.



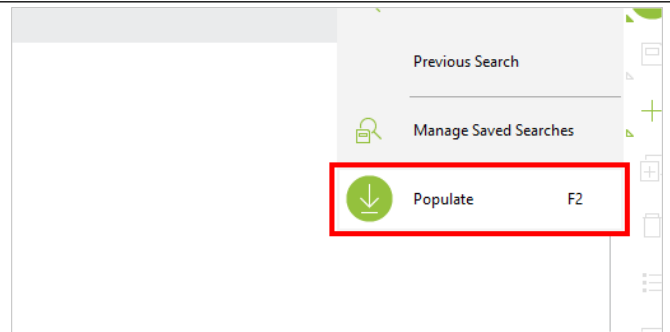
Navigate to **Application Base Setup, General Data, Coordinators**.

Basic Data	VMISUPP19	VMISUPP19
General Data	VMISUPP20	VMISUPP20
Delivery Terms	P02-001	AAA Heat Treat
Delivery Route	43	Repetitive Supplier
Delivery Routes	3080	Job Cost supplier
Ship Via Codes	1001	CRS Tire & Rims Inc
Transport Unit Types	C1000	Customer 1000
Coordinator Groups	12000	United Airlines
Coordinators	13000	Southwest Airlines
Cancellation Reasons	ACORN	Acorn Commodities
Scrapping Causes		
Document Phrase Detail		
Document Text Administra		
Unit of Measure		
Characteristics		
Media Library		

Click on the menu item drop down **Search**.



Click on the menu item **Populate**.
You may also press **F2**.



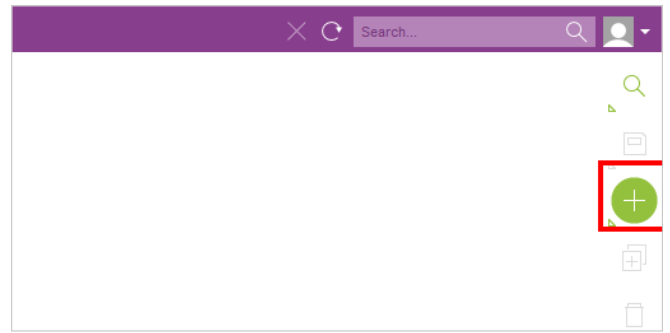
Click on the column **Coordinator ID** with the value **UK_DEMO11**.

Coordinator ID	Name
UK_DEMO11	Janet Apollo (11)
DEDEMO09	Jürgen Fatter
ALAIN	Alain Prost
ALEX	Alexander Daniel
DAVID	David Coulthard

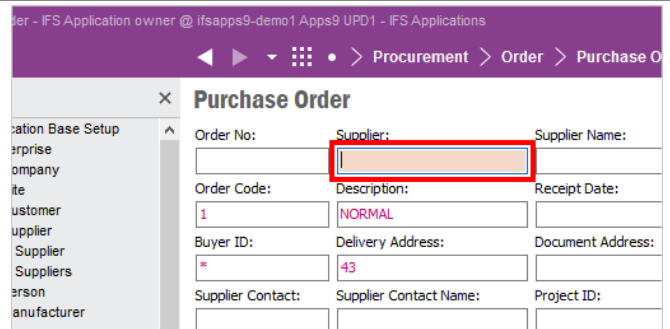
Navigate to **Procurement, Order, Purchase Order**.

Accounting Rules	INPU
Financials	MAIN
Human Resources	SAMI
Procurement	KIMI
Requisition	JARNO
Quotation	PEDRO
Supplier Schedule	JACKIE
Order	GRAHAM
Purchase Order	CTO-1
Purchase Orders	ALME
Purchase Order Lines	
Incoming Purchase Order	
Milestone/Stage Payment	
Payment Schedule for Pu	
Automatic Order Process	

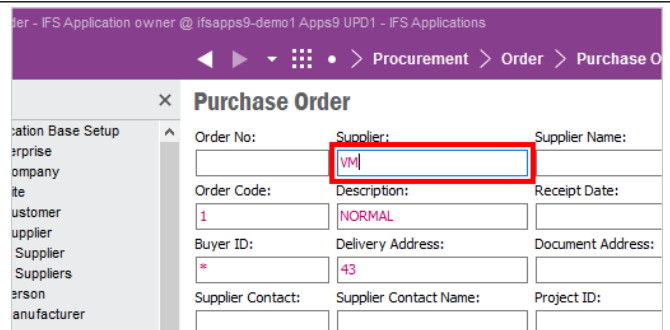
Click on the tool strip item **New**.
You may also press **F5**.



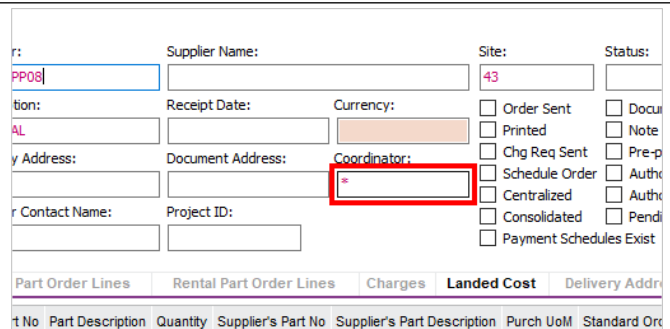
Click on the data field **Supplier**.



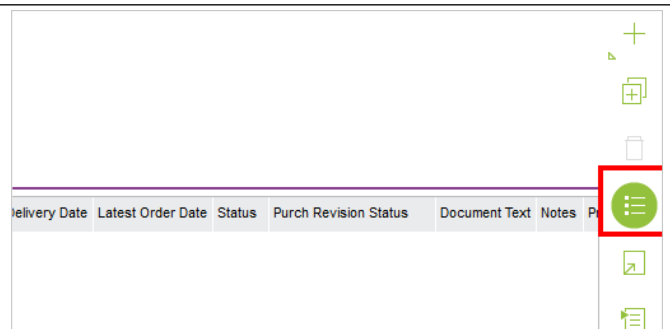
Enter **Supplier**.



Click on the data field **Coordinator**.



Click on the tool strip item **List of Values...**
You may also press **F8**.



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Click on the column **Coordinator** with the value **DEDEMO07**.

Coordinator	Coordinator Name
DEDEMO07	Harald Hess
NILEFR	Nicolas Leclercq
GIBOFR	Gilles Bourquard
UK_DEMO11	Janet Apollo (11)
DEDEMO09	Jürgen Falter

Click on the push button **OK**.

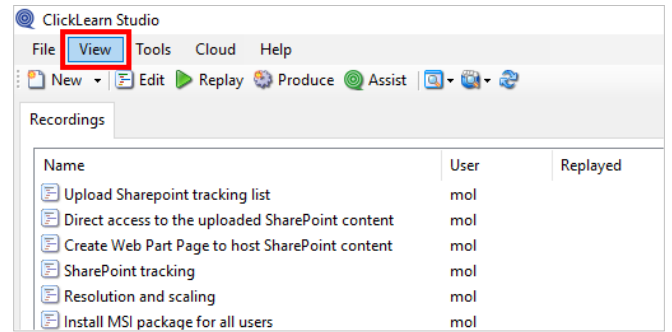
Click on the tool strip item **Home**.
You may also press **Alt + Home**.

Click on the button **No**.

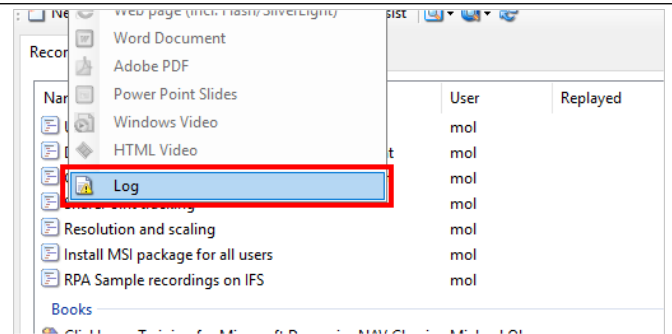
Click on the button **OK**.

12.5.4. Replay log

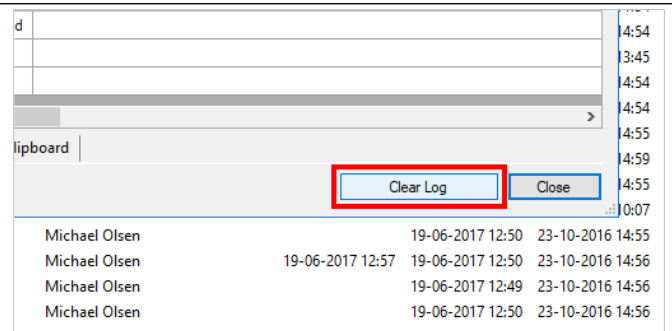
Click on the menu **View**.
You may also press **Alt+V**.



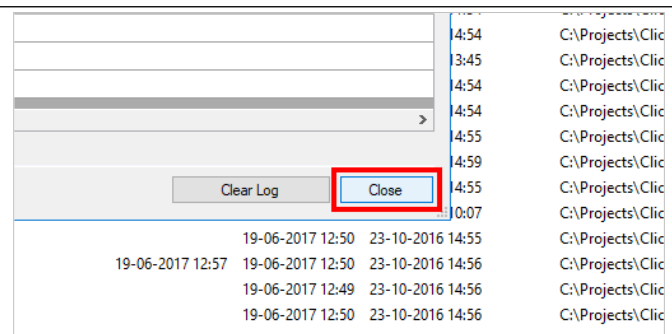
Click on the menu **Log**.



Move the mouse to the button **Clear Log**.
You may also press **Alt+L**.
You may clear the log here at any time.



Click on the button **Close**.
You may also press **Alt+C**.

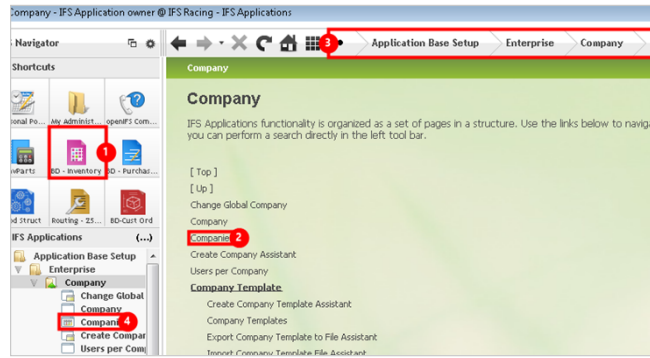


13. IFS specific

13.1. Best practice when recording

13.1.1. How to record navigation

When you record work instructions in the IFS explorer, you have multiple ways of starting a specific module.



1. Shortcuts
2. Links
3. Breadcrumb
4. Navigation tree

You may record using any of the mentioned methods and they are fully supported by ClickLearn.

However, we do recommend that you record using the navigation tree, because it results in a clean single step, where the full path of the navigation is included in text form, and therefore makes it easy to search for in the produced material.

13.1.1.1. Exclude navigation tree steps

Recording the navigation tree often includes multiple clicks to expand nodes before reaching the actual node that starts a module.

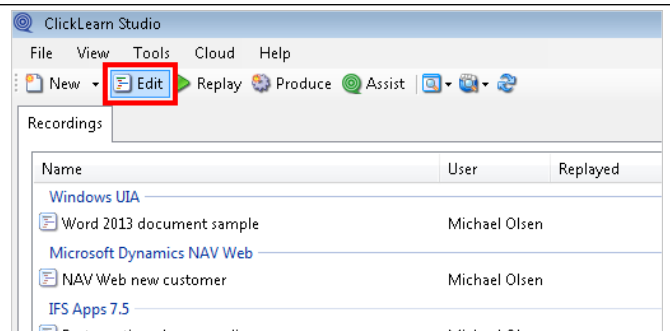
These steps only takes up space in the produced material, and both the replay and assist functionality will automatically detect when expansion is needed.

All you need to do is to exclude the steps.

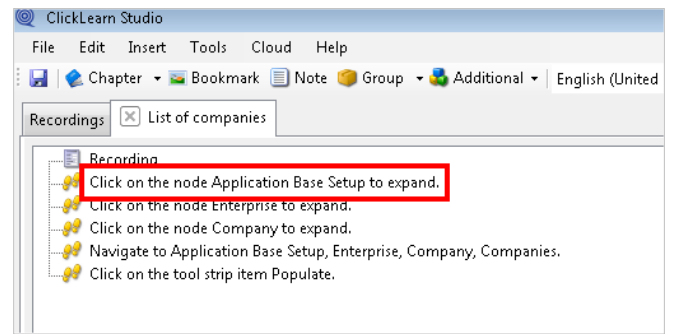
Select the recording



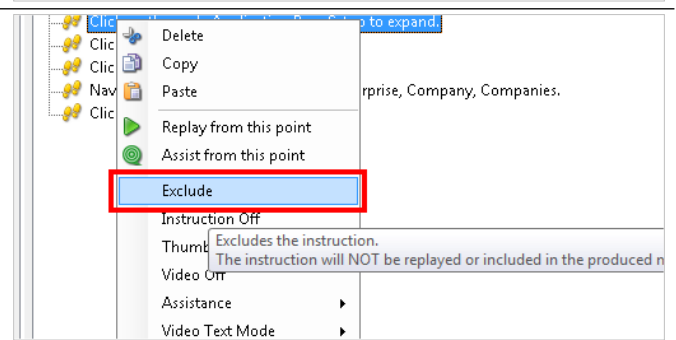
Click on the button **Edit**.
You may also press **Alt+D**.



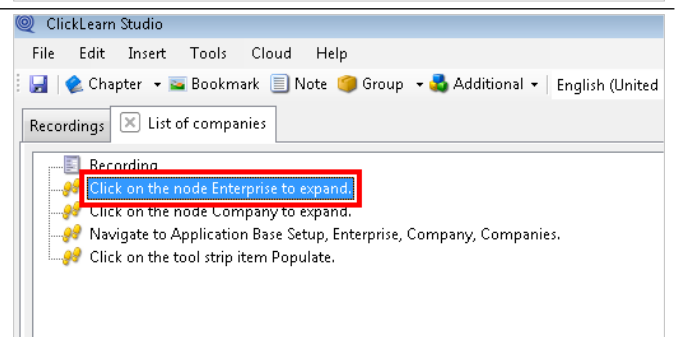
Right click on the folder **Click on the node Application Base Setup to expand..**



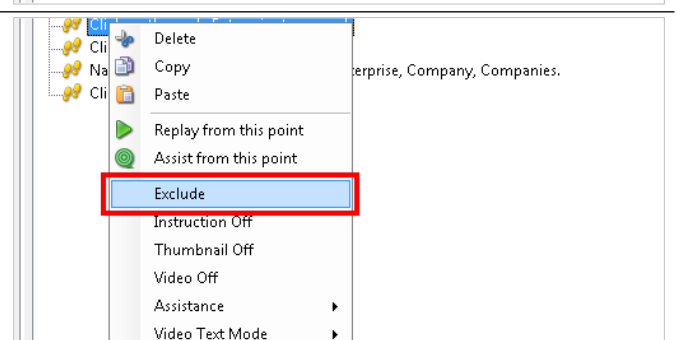
Click on the menu **Exclude.**



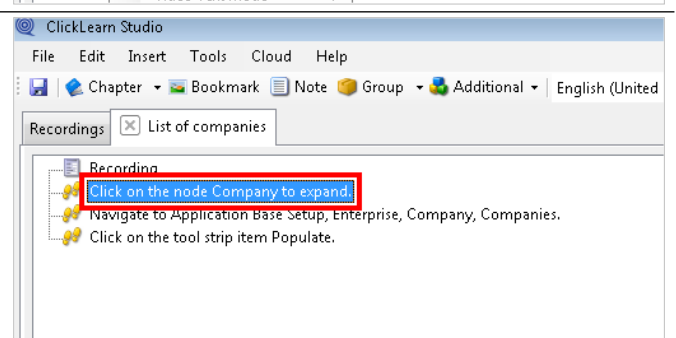
Right click on the folder **Click on the node Enterprise to expand..**



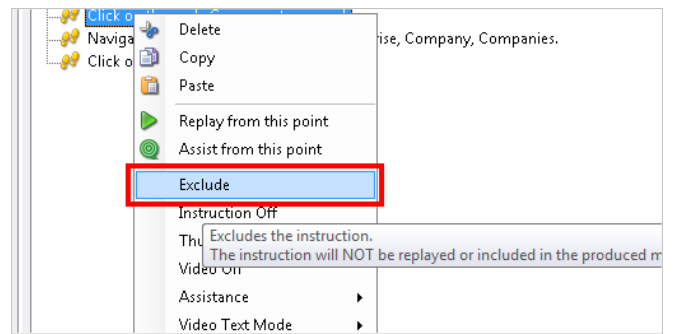
Click on the menu **Exclude.**



Right click on the folder **Click on the node Company to expand..**

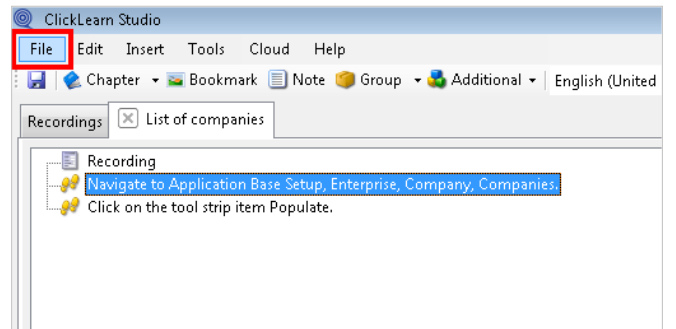


Click on the menu **Exclude**.

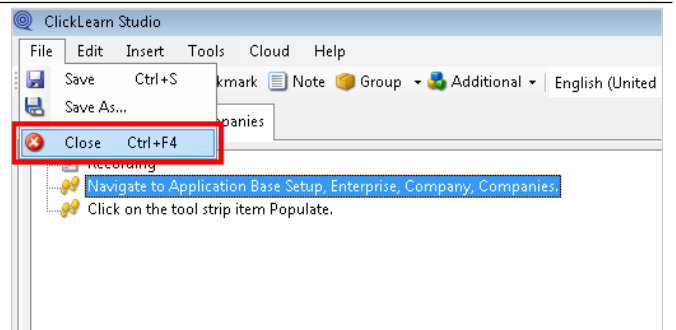


Once the steps have been excluded only one step remains, which is the needed step that navigates to the module.

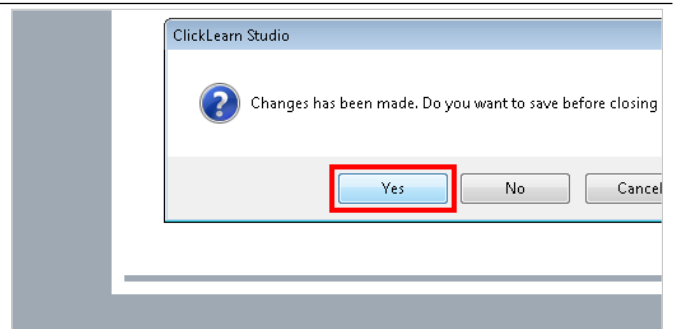
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



Click on the button **Yes**.
You may also press **Alt+Y**.



13.2. Convert to a newer IFS version

13.2.1. Introduction

When you upgrade your IFS system from 7.5 to 8, 8 to 9 or even from 7.5 directly to 9, you will also need to update your work instructions and training material.

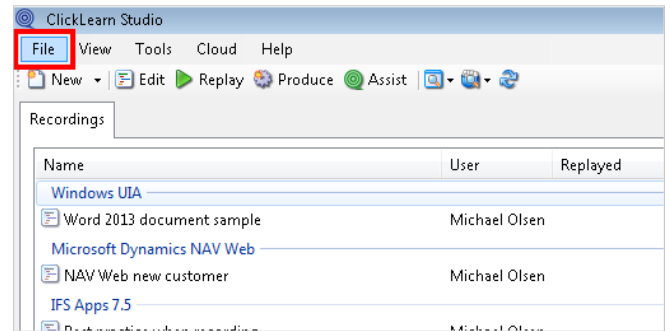
ClickLearn offers a near to automatic converter, which will convert a recording from one version to a higher one.

The conversion will transform various steps where the user interface controls have changed in IFS.

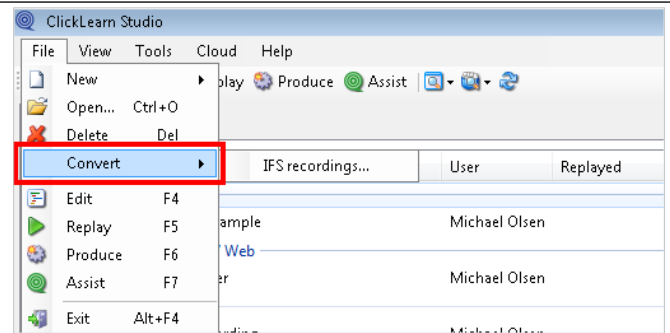
13.2.2. Convert a recording

Please note, that you may select multiple recordings for conversion.

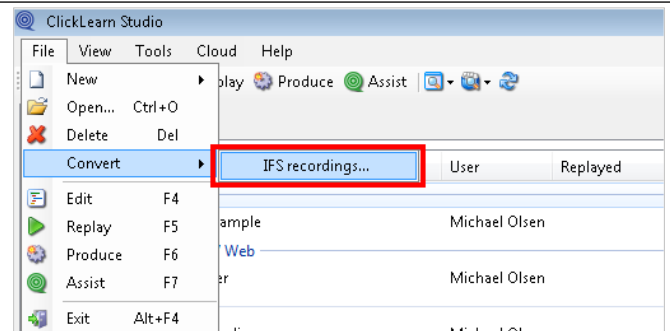
Click on the menu **File**.
You may also press **Alt+F**.



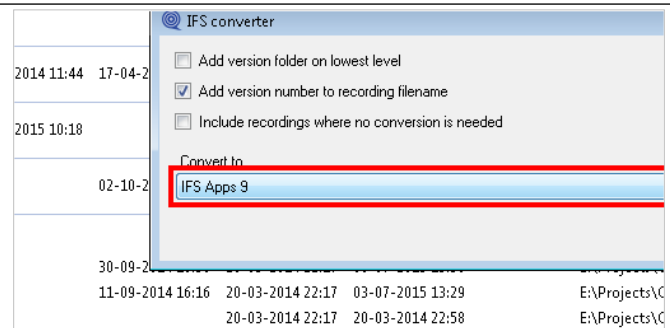
Click on the menu **Convert**.



Click on the menu **IFS recordings....**



Click on the combo box **Convert to**.

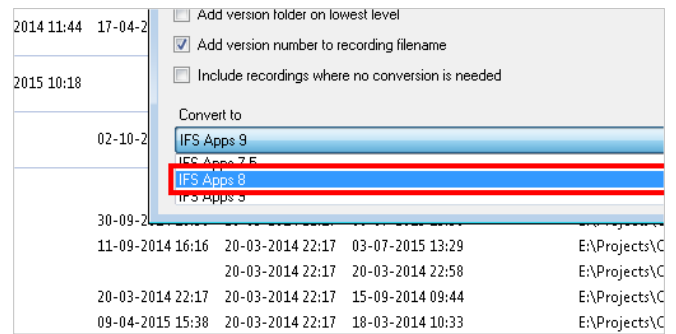


Here you see a list of the supported IFS versions.

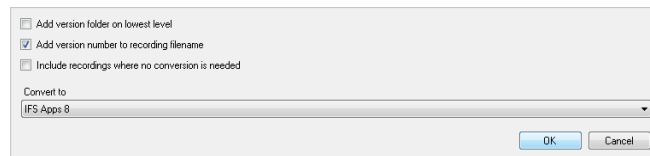
Please note, that no conversion is performed if you try to convert a recording to a lower IFS version.

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Click on the list element **IFS Apps 8**.



13.2.3. Version handling



When you convert a recording, no changes will be done to the source recording.

A new recording will be created and the filename will be set according to the two options available in this dialog.

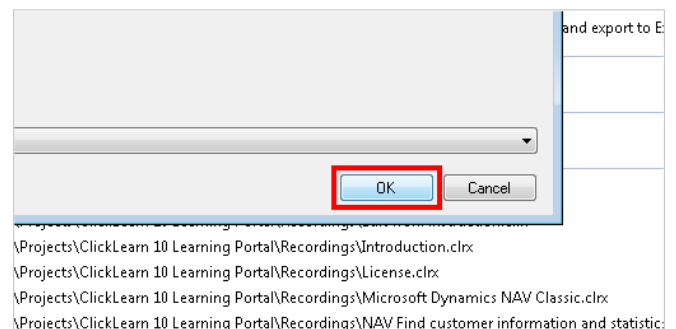
The default checked option to add the version number to the recording makes sure that the new recording is stored in the same location as the source recording.

If you check the option to add version folder to lowest level, the new recording file will be stored in a subfolder named according to the version number.

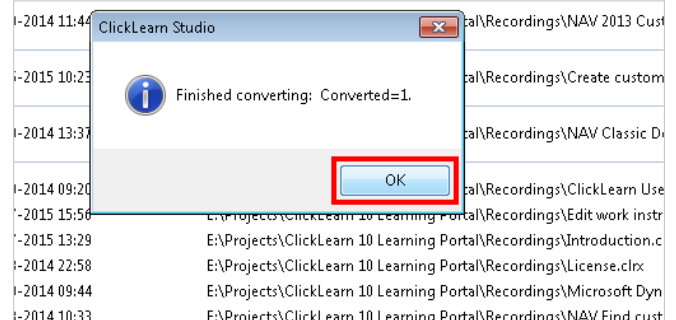
Both option may be selected, creating first a sub folder and then adding the version number to the filename.

13.2.4. Perform the conversion

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



Click on the button **OK**.



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Click on the list element **List of companies v8**.

IFS Apps 7.5	
Best practice when recording	Michael Olsen
List of companies	Michael Olsen
IFS Apps 8	
IFS Create new customer	Michael Olsen
IFS Create new customer - 中国	Michael Olsen
List of companies v8	Michael Olsen
Microsoft Dynamics AX 2012 R2	
AX Vendor edit	Michael Olsen
Microsoft Dynamics GP 2013	
GP 2013 Customer information	Michael Olsen
Microsoft Dynamics NAV 2013	

This is the converted recording, which may now be replayed or used directly in ClickLearn Assist.

13.3.Prepare an IFS Learning Portal

13.3.1. Introduction

In order to create a Learning Portal with the Assist link activated, you need to produce a Shelf and have a Shelf template where the Assist link is activated.

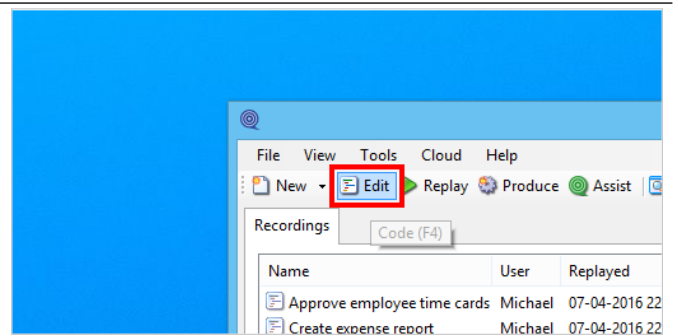
13.3.2. Prepare the Shelf

Click on the list element **Learning Portal**.

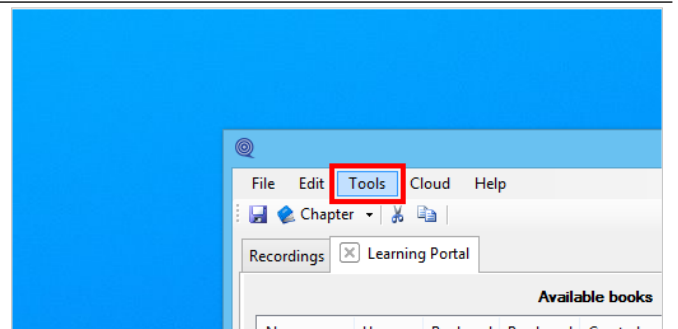
Enterprise	Michael		
Shelfs			
Human Resources	Michael		31-03-2
Financials	Michael		31-03-2
Engineering	Michael		31-03-2
Procurement	Michael		31-03-2
Learning Portal	Michael		20-04-2
Apps75	Michael		02-04-2

Licensed to ClickLearn

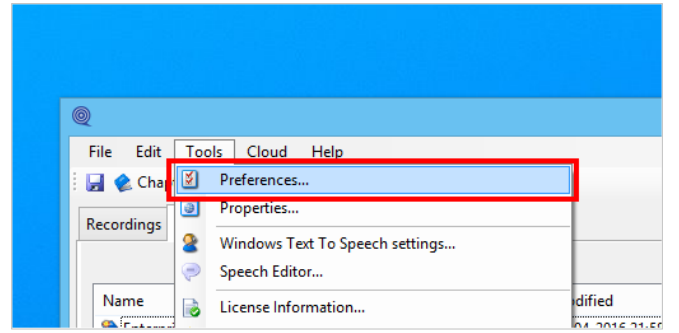
Click on the button **Edit**.
You may also press **Alt+D**.



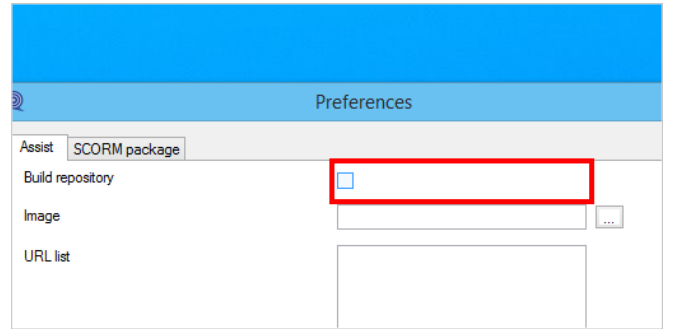
Click on the menu **Tools**.



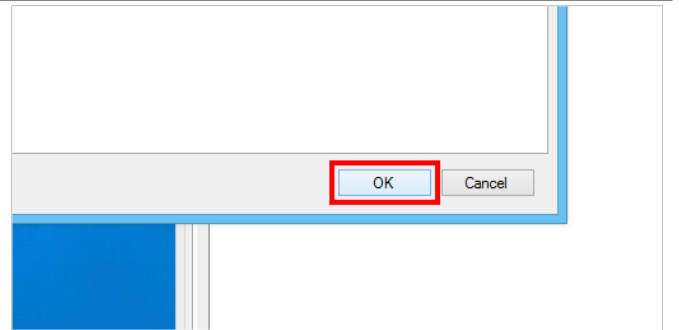
Click on the menu **Preferences...**



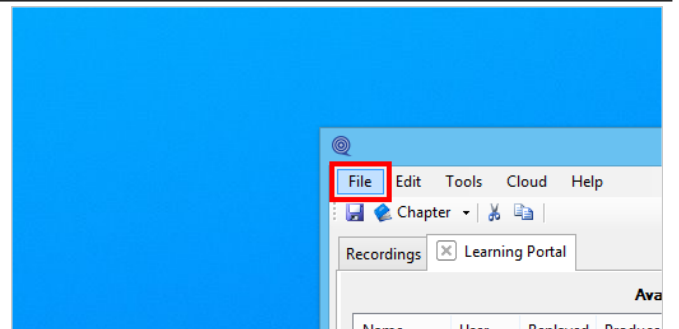
Click on the checkbox **Build repository**.



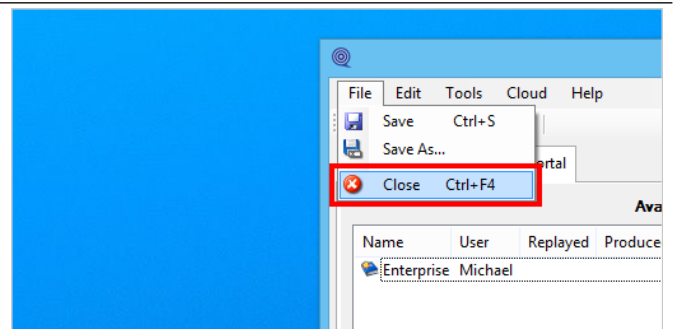
Click on the button **OK**.
You may also press **Alt+O**.



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

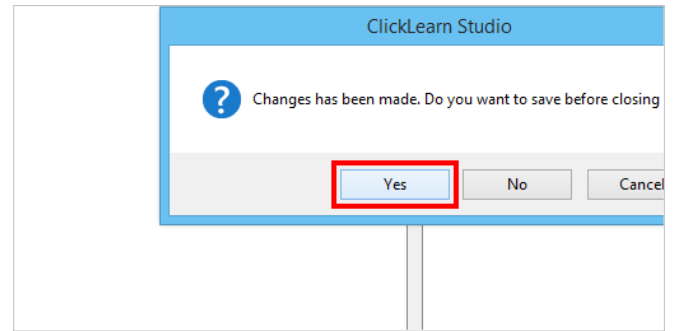


Click on the menu **Close**.



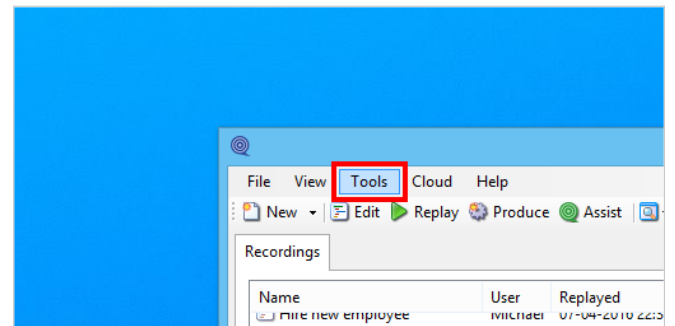
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Click on the button **Yes**.
You may also press **Alt+Y**.

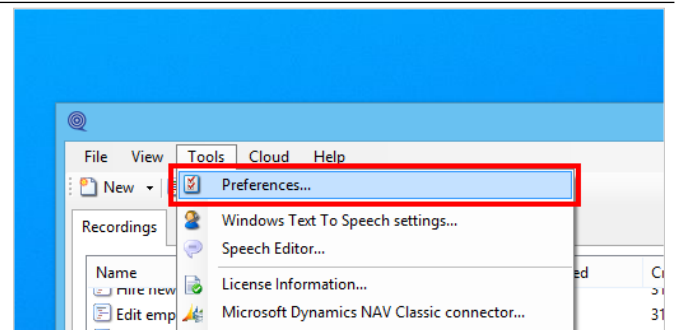


13.3.3. Prepare the Shelf template

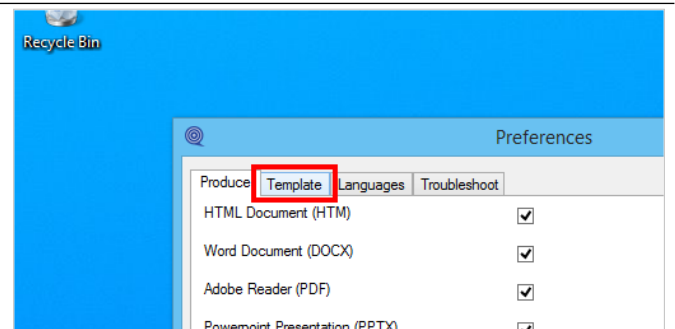
Click on the menu **Tools**.



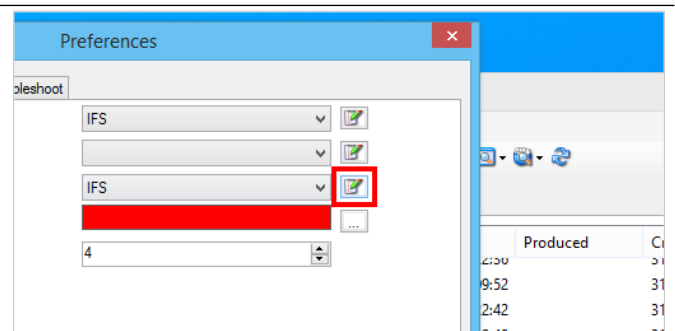
Click on the menu **Preferences...**



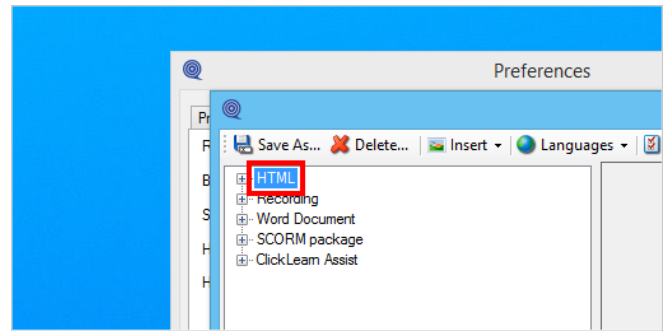
Click on the tab **Template**.



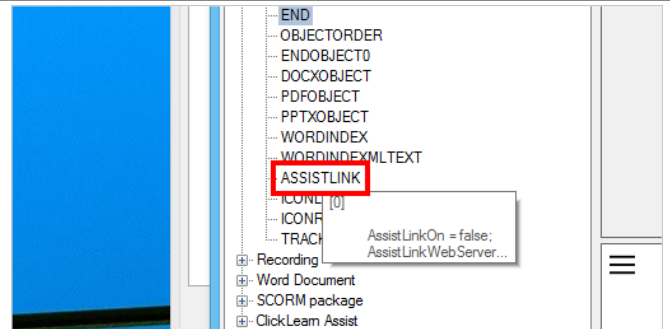
Click on the button **Shelf template**.



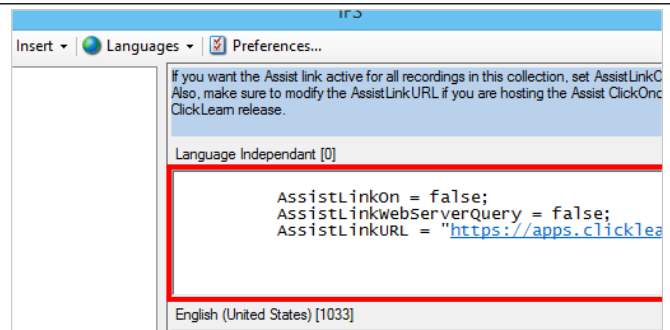
Double click on the folder **HTML**.



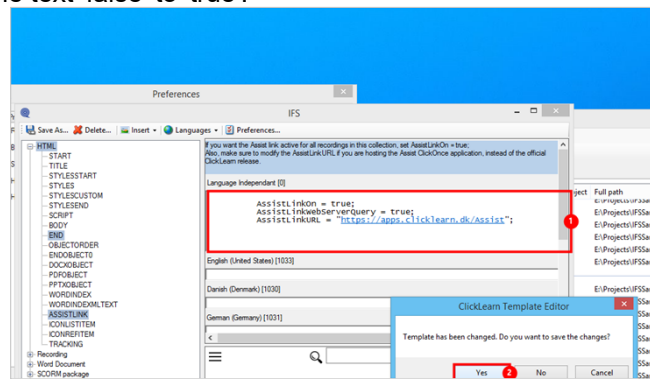
Click on the folder **ASSISTLINK**.



Click on the input field **Language Independent [0]**.
You may also press **Alt+L**.



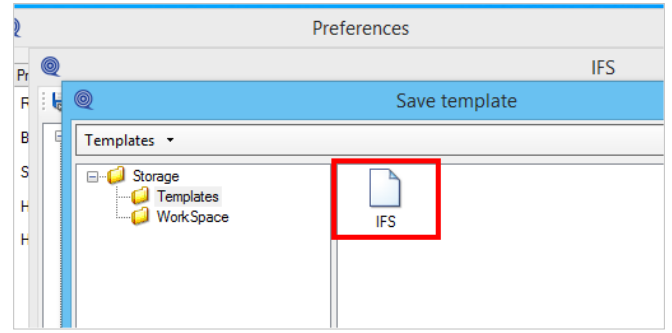
Here you need to change the text 'false' to 'true'.



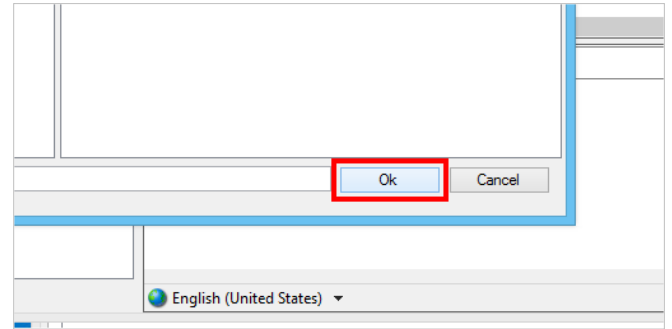
1. Press the **Backspace** key 5 times. Enter **Language Independentant [0]**. Press the **Arrow down** key. - Press the **Backspace** key 6 times. Enter **Language Independentant [0]**.
2. Close the Window and click on the button **Yes**.

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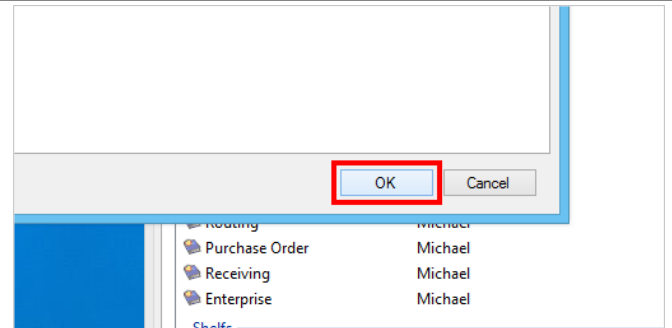
Click on the list element **IFS**.



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



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



The Shelf may now be produced.

13.3.4. Publish the produced Shelf

The produced Shelf is in this sample located in the folder E:\Projects\IFSSample\Learning Portal.

Adding the path E:\Projects\IFSSample\Learning Portal\Learning Portal.htm as an address to a shortcut in IFS will not work entirely as we want it. It will open the content in a separate window.

You need to copy the entire folder to a web server, so that you get a real http address.

For example, <http://companyintranet/IFSSample/Learning%20Portal>

If you do not know how to get this yourself, please talk to your IT department.

When you have managed to publish the folder to a web server, the address needed for the IFS shortcut should be <http://mycompanyintranet/IFSSample/Learning%20Portal/Learning%20Portal.htm>

13.4.FSM Connector

13.4.1. Introduction

The IFS FSM connector supports the IFS Field Service Management version 5.6 and 5.7.

The connector will be able to record, replay and assist in multiple languages.

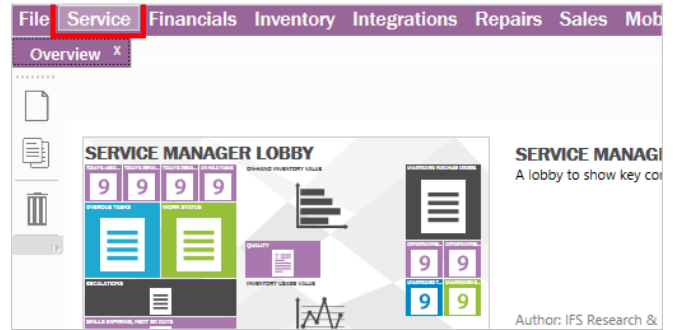
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13.4.2. Limitations

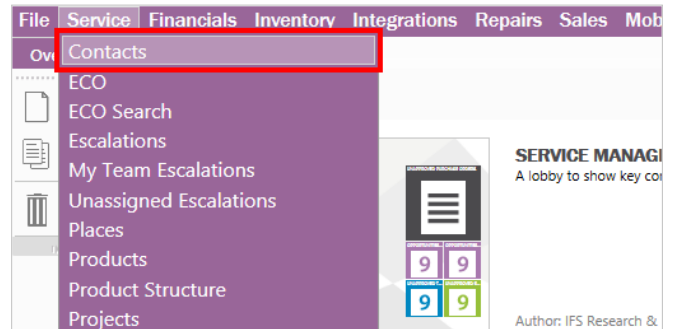
The connector does not currently support the following special screens: - UI Designer - Workflow Designer - Product Structure - Mobile Dashboard - Metadata Explorer - Lobby Designer - Special MWFM screens

13.4.3. Sample recording

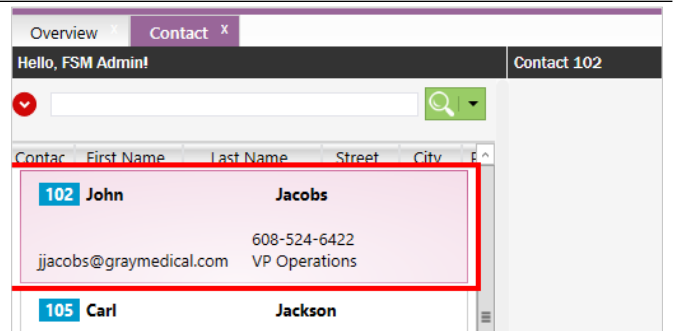
Click on the menu item **Service**.



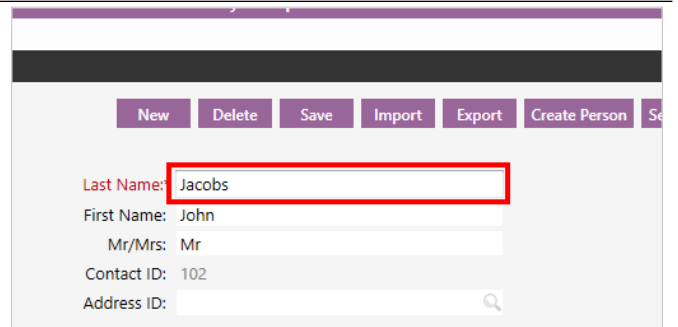
Navigate to the menu **Service, Contacts**.



Click on the list item **102** where **Contact ID = 102**, **First Name = John**, **Last Name = Jacobs**.



Click on the text field **Last Name**.



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

A screenshot of a web application interface for managing a person's profile. At the top, there are several buttons: New, Delete, Save, Import, Export, Create Person, and a partially visible 'Se'. Below these buttons, there are several text input fields: 'Last Name*' with the value 'Jacobs', 'First Name' with the value 'John' (highlighted with a red box), 'Mr/Mrs' with the value 'Mr', 'Contact ID' with the value '102', and 'Address ID' with a search icon. The 'Address' field is partially visible at the bottom.

Click on the text field **Mr/Mrs**.

A screenshot of the same person management form. The 'Mr/Mrs' dropdown menu is now highlighted with a red box, and its value is 'Mr'. The other fields remain the same as in the previous screenshot.

Click on the text field **Work Phone**.

A screenshot of the person management form showing contact information. A 'Send SMS' button is at the top left. The 'Work Phone' field contains '608-524-6422' and is highlighted with a red box. Other fields include 'Extension:', 'Mobile Phone:' with '608-524-6400', 'Home Phone:', and 'Email:' with 'jjacobs@graymedical.com'.

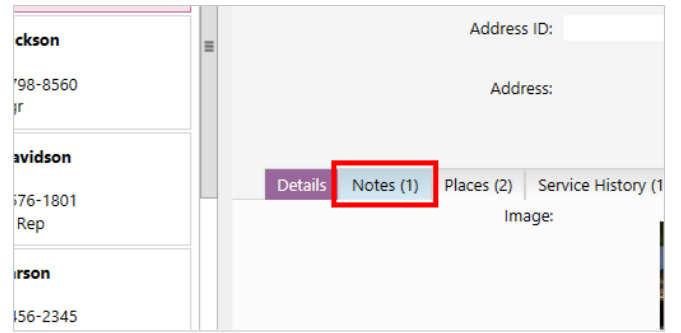
Click on the text field **Mobile Phone**.

A screenshot of the person management form showing contact information. The 'Mobile Phone' field contains '608-524-6400' and is highlighted with a red box. The 'Work Phone' field is '608-524-6422'. The 'Email' field is 'jjacobs@graymedical.com' and the 'Comments' field contains 'Key Influencer'.

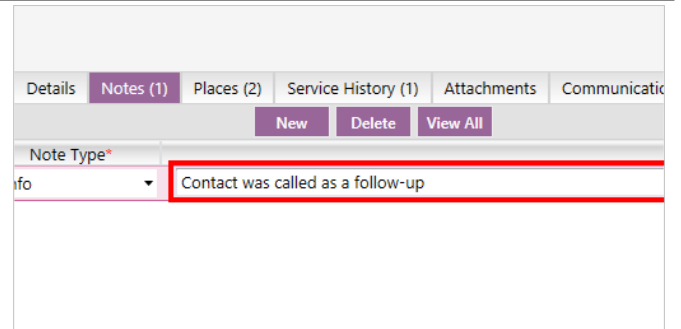
Click on the tab **Details**.

A screenshot of a person management interface. On the left, there is a list of three people: 'Jackson' (262-798-8560, IT Mgr), 'Davidson' (858-576-1801, Sales Rep), and 'Larson' (424-456-2345). On the right, there is a detailed view of a person's profile. The 'Details' tab is highlighted with a red box. Other tabs include 'Notes (1)', 'Places (2)', and 'Service'. The 'Address ID' and 'Address' fields are visible in the background.

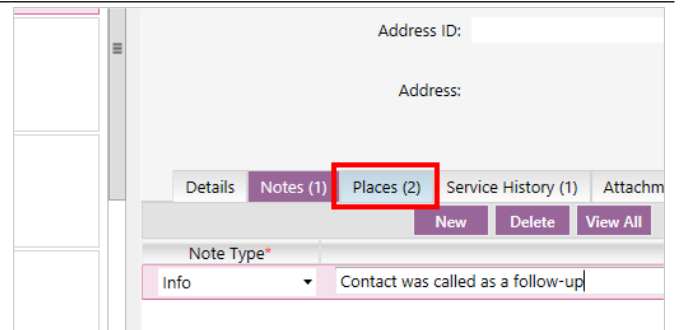
Click on the tab **Notes (1)**.



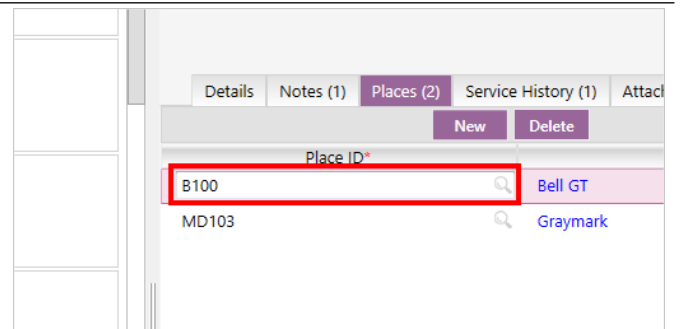
Click on the textbox in the column **TextEditor**.



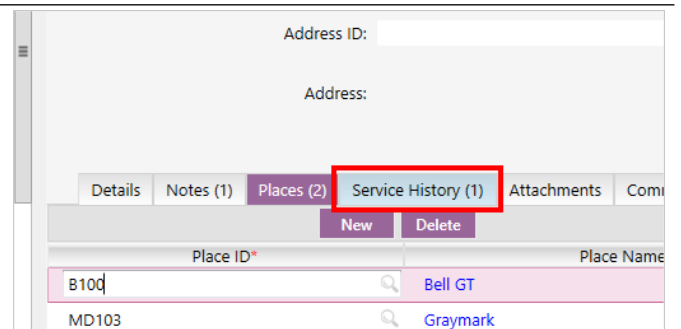
Click on the tab **Places (2)**.



Click on the textbox in the column **Place ID**.

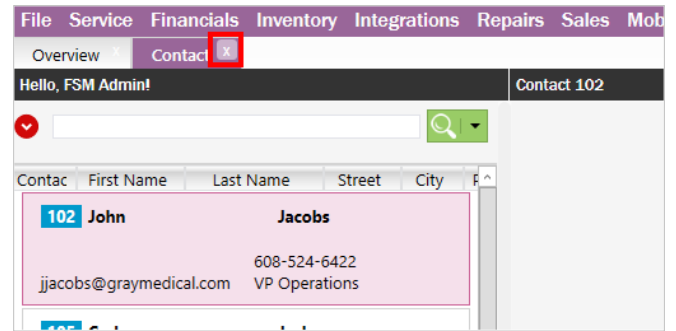


Click on the tab **Service History (1)**.



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Click on the close button on the tab **Contact**.



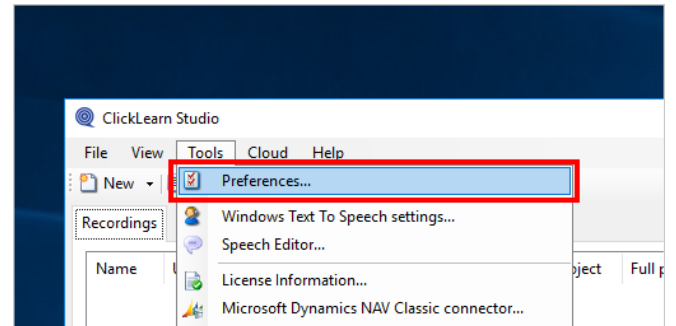
13.5.IFS Scope Tool

13.5.1. Preferences

Click on the menu **Tools**.

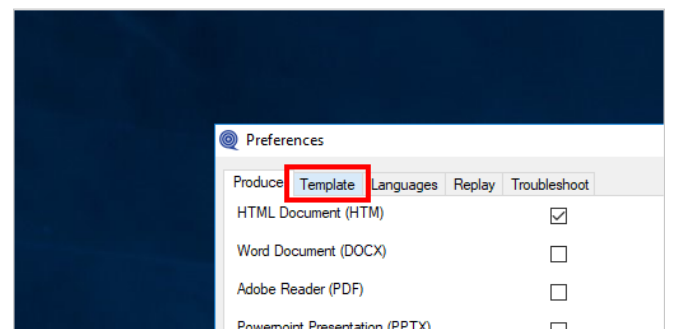


Click on the menu **Preferences...**

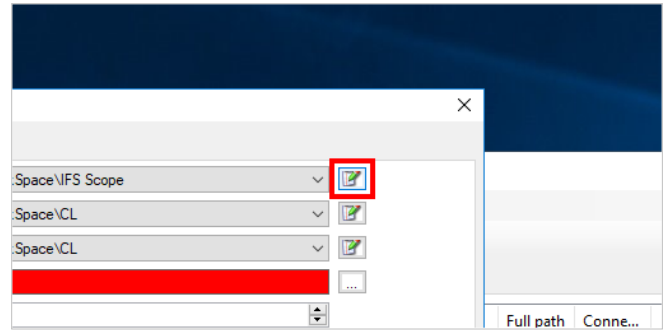


13.5.1.1. Template

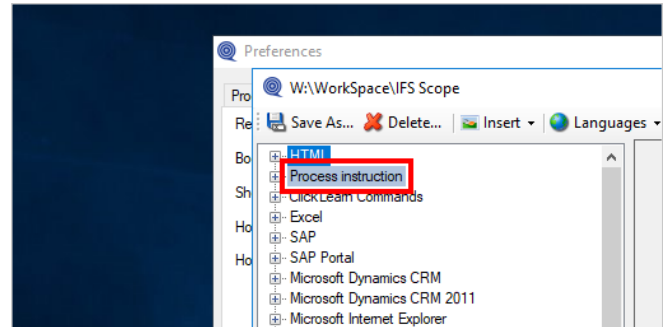
Click on the tab **Template**.



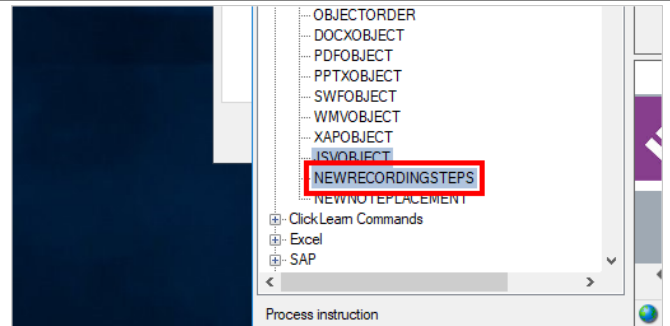
Click on the button .



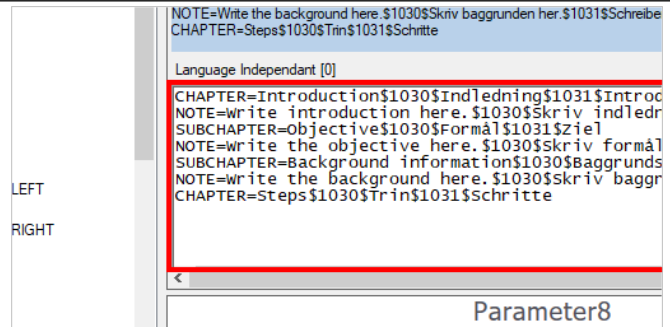
Double click on the folder **Process instruction**.



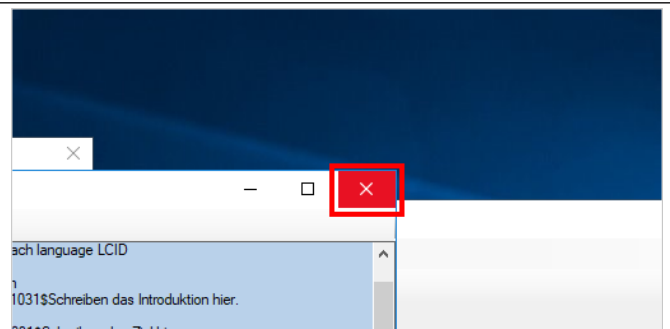
Click on the folder **NEWRECORDINGSTEPS**.



Click on the input field **Language Independant [0]**.
You may also press **Alt+L**.

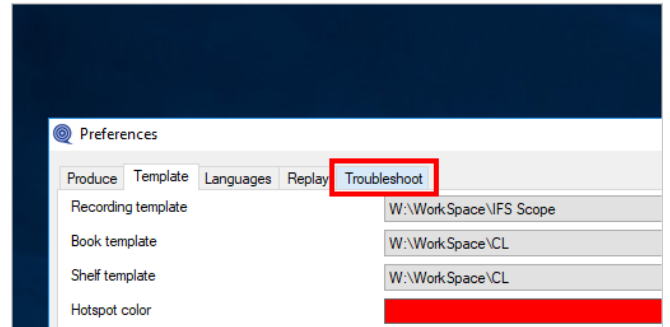


Click on the button **Close**.

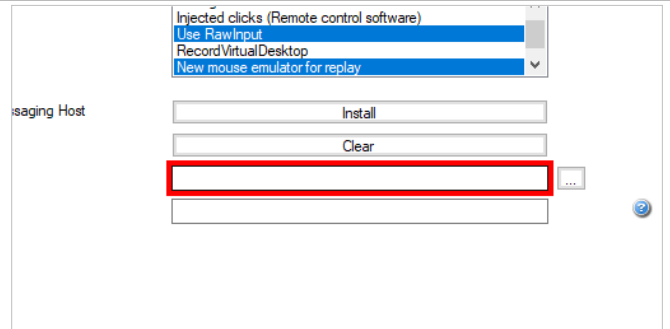


13.5.1.2. Destination folder

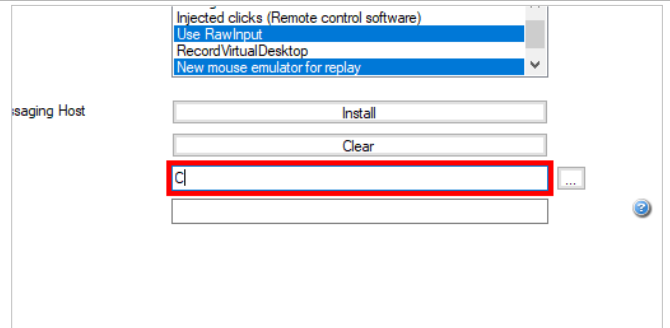
Click on the tab **Troubleshoot**.



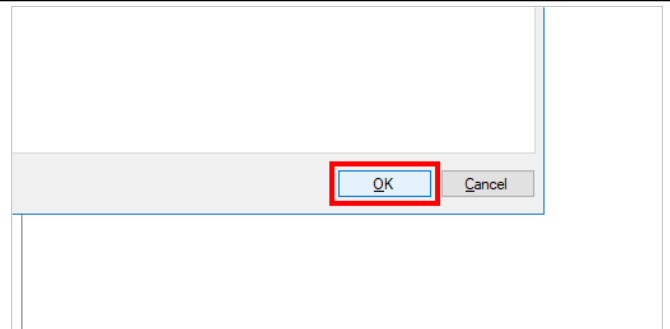
Click on the input field **Path for Recording List**.



Enter **Path for Recording List**.

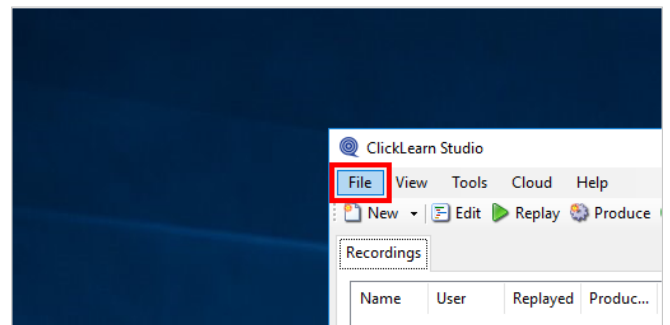


Click on the button **OK**.
You may also press **Alt+O**.



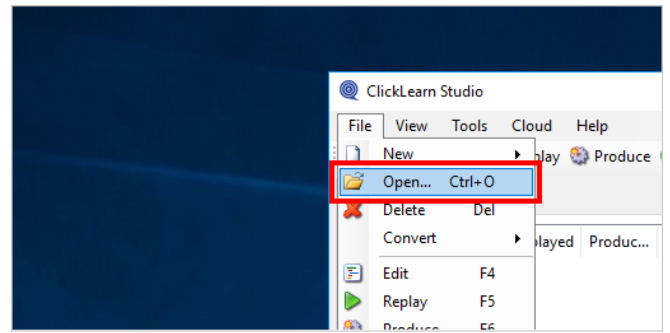
13.5.2. Import Scope Tool file

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

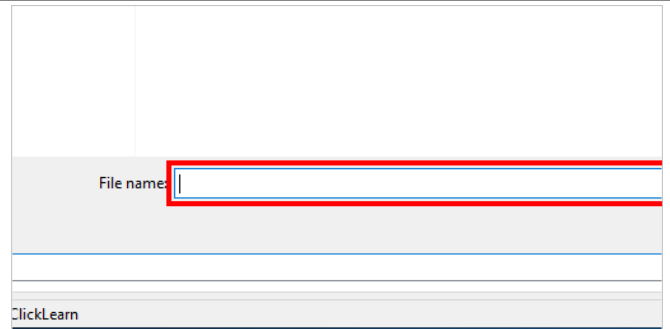


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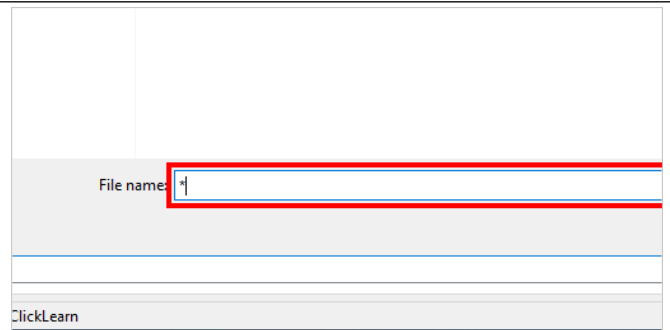
Click on the menu **Open....**



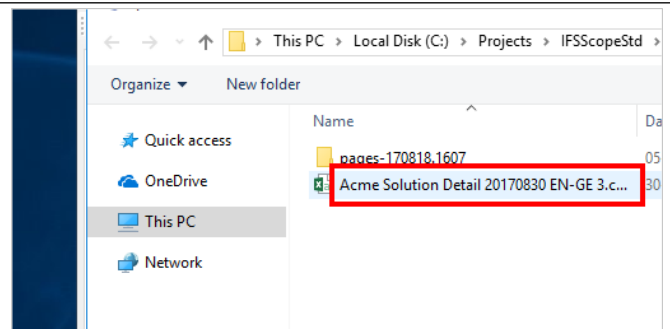
Click on the combo box .
You may also press **Alt+N**.



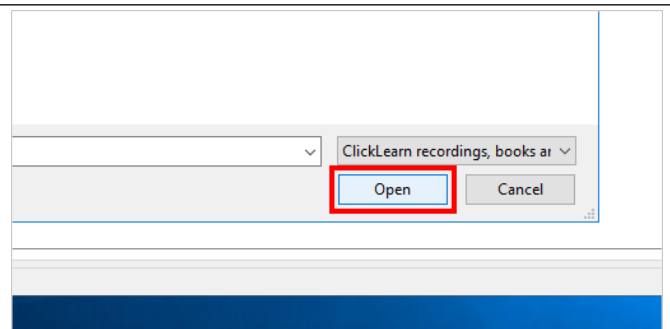
Enter the text ***.csv**. Press the **Enter** key.



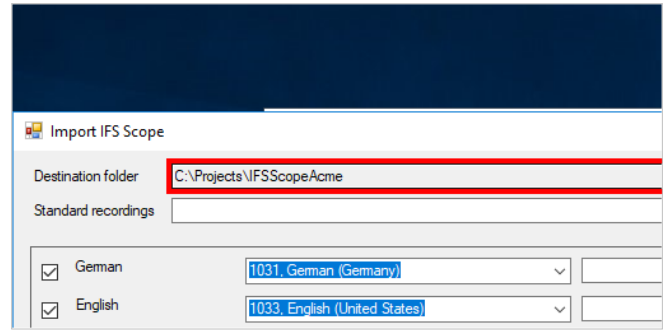
Click on the input field **Name**.



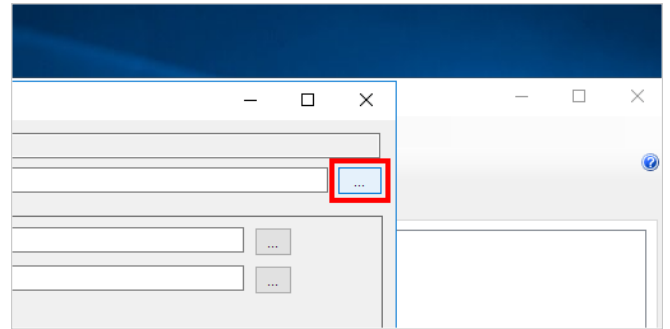
Click on the button **Open**.
You may also press **Alt+O**.



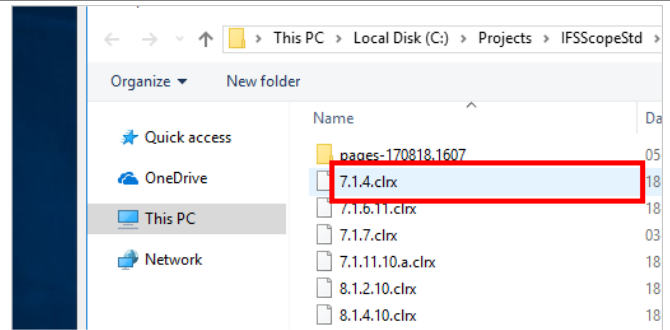
Move the mouse to the input field **Destination folder**.



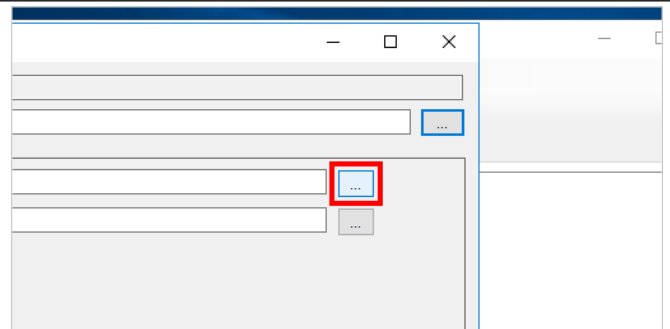
Click on the button **Standard recordings**.



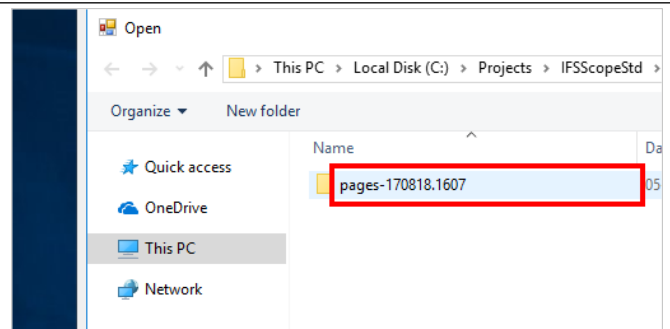
Double click on the input field **Name**.



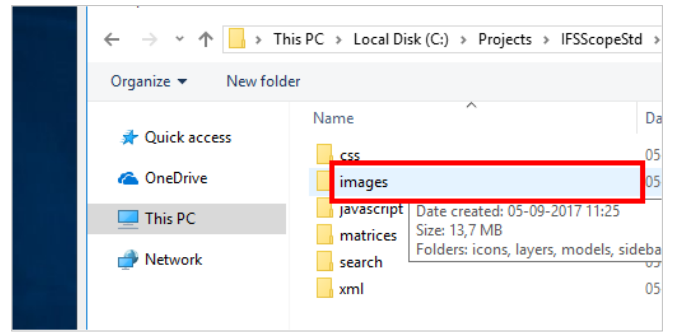
Click on the button



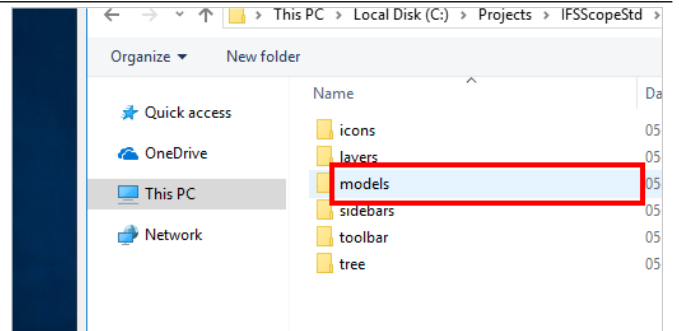
Double click to select the folder containing the pages.



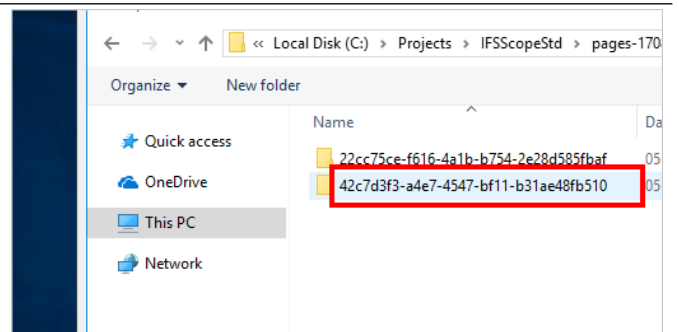
Double click on the folder containing the images.



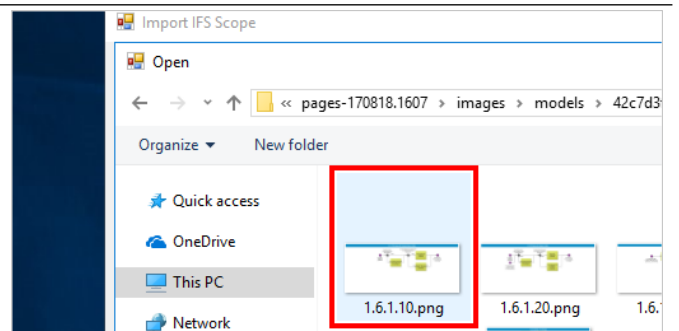
Double click on the folder containing the models.



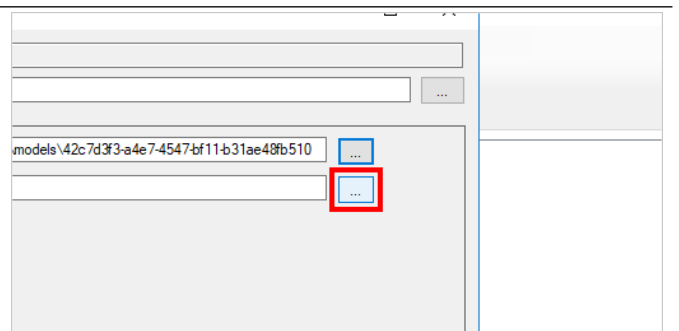
Double click on the folder containing named with a unique id for the correct language.



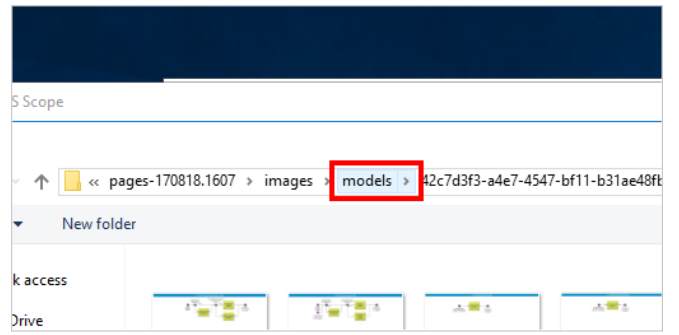
Double click on any of the images in the view.



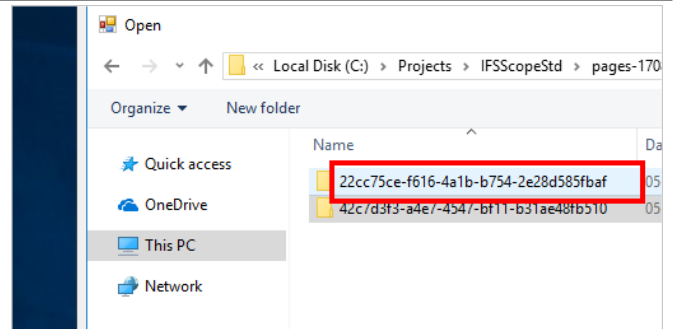
Click on the button



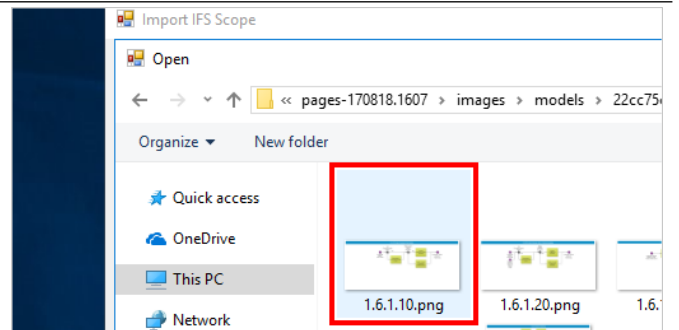
Click on the split button **models**.



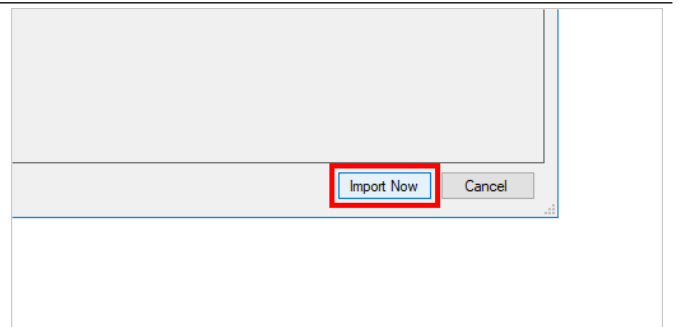
Double click on the folder containing named with a unique id for the correct language.



Double click on any of the images in the view.



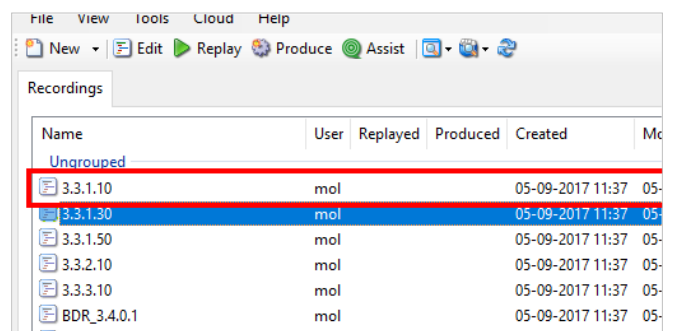
Click on the button **Import Now**.



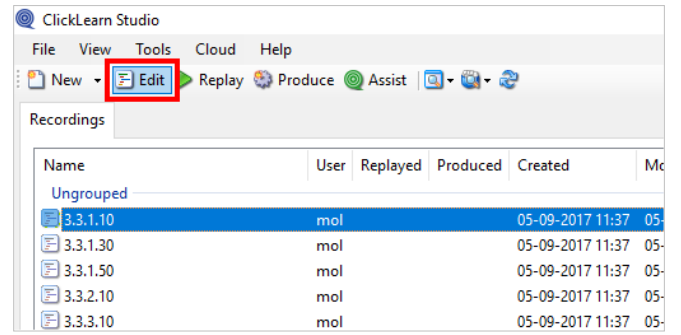
13.5.3. The imported content

13.5.3.1. Recordings

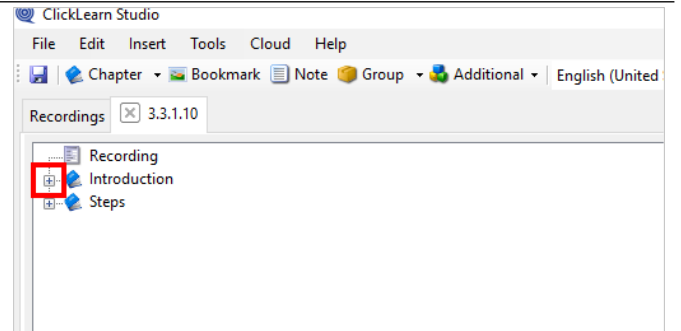
Click on the list element **3.3.1.10**.



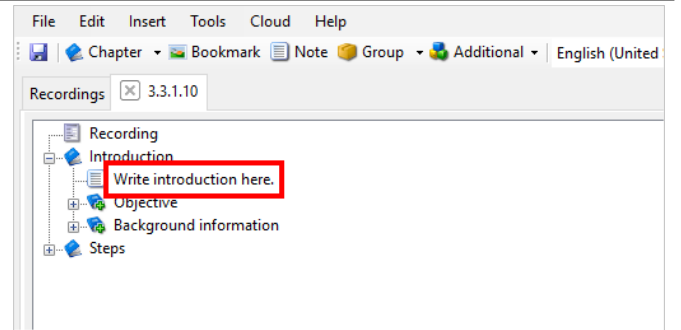
Click on the button **Edit**.
You may also press **Alt+D**.



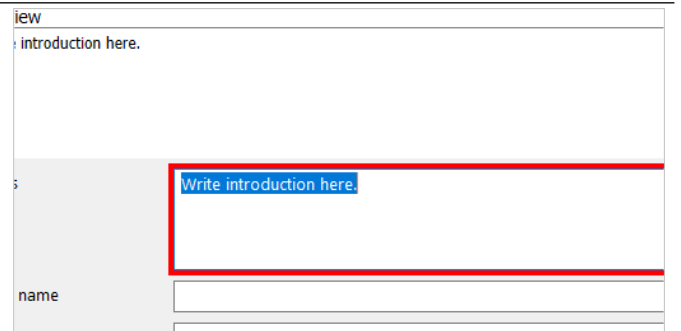
Click to expand **Introduction**.



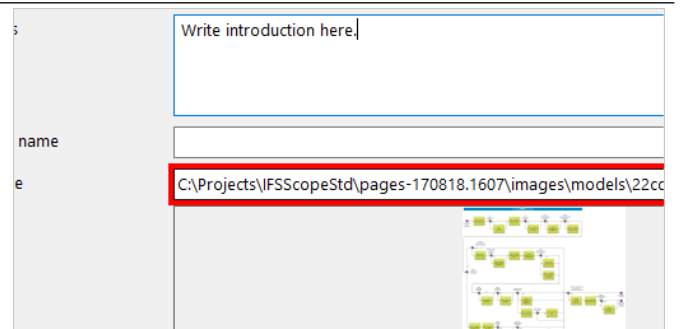
Double click on the step.



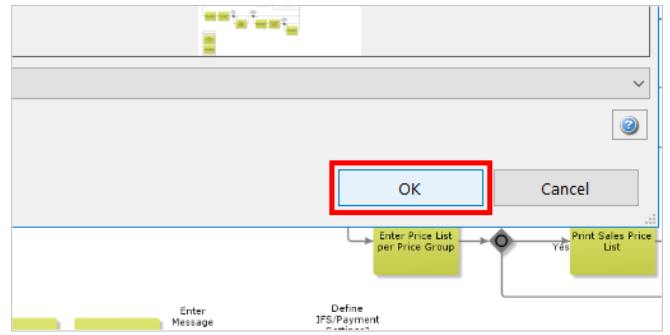
Click on the input field **Notes**.



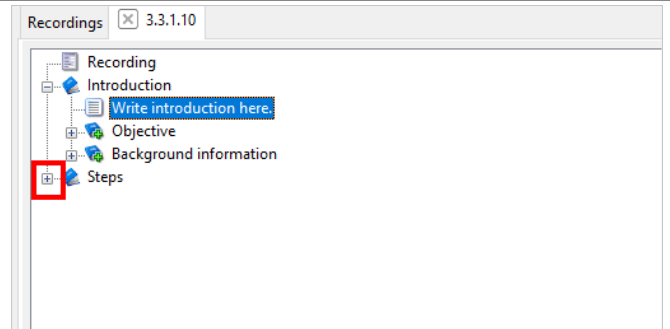
Click on the input field **Picture**.



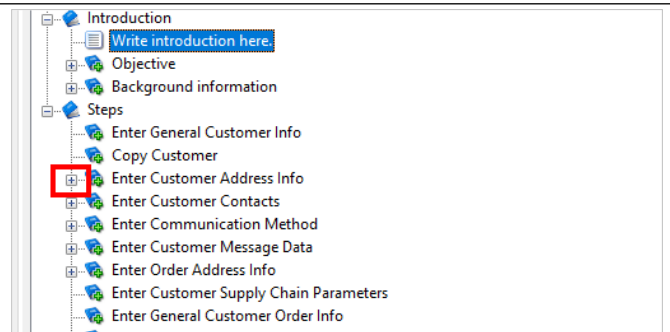
Click on the button **OK**.
You may also press **Alt+O**.



Click to expand **Steps**.

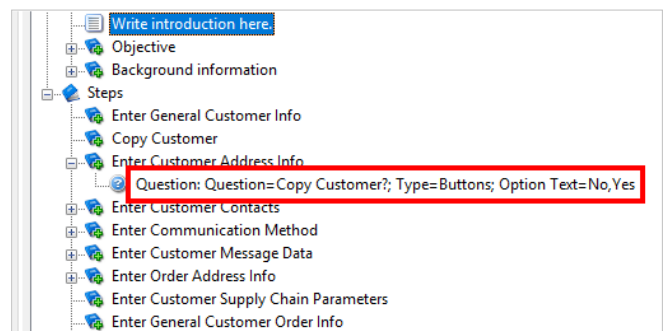


Click to expand the subchapter.

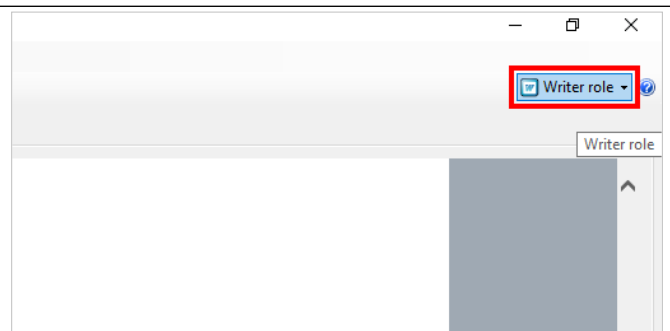


13.5.3.2. Decision gate

Click on the question step.



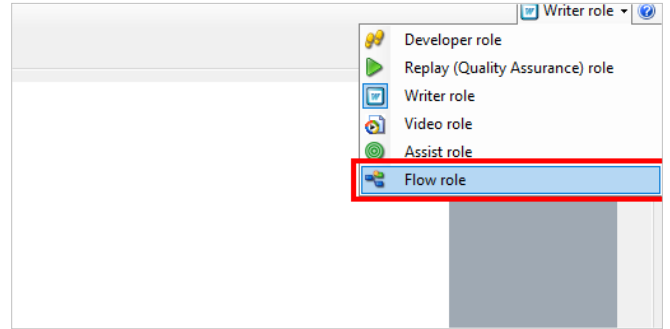
Click on the menu **Writer role**.



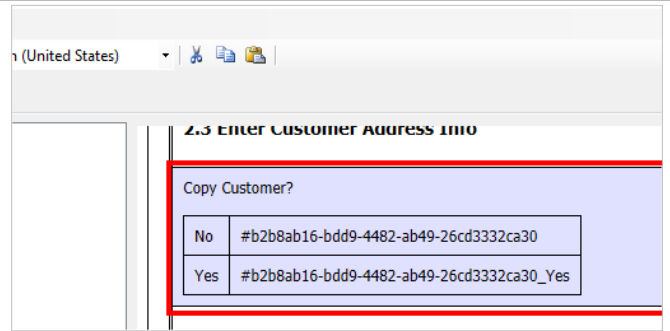
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13.5.3.3. Video Flow role

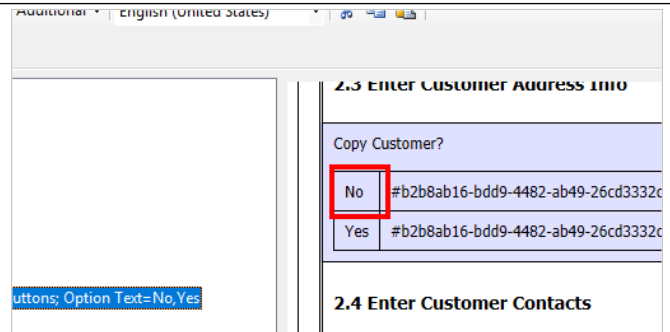
Click on the menu **Flow role**.



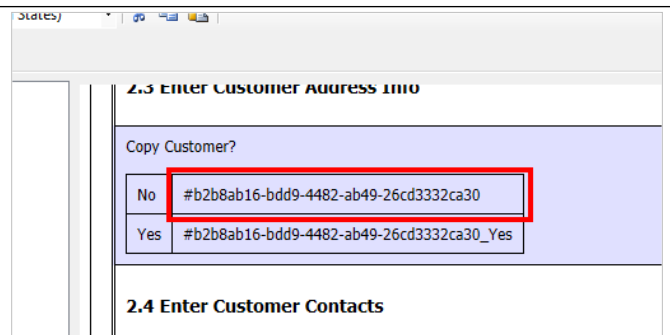
Move the mouse to **Copy Customer?**
No#b2b8ab16-bdd9-4482-ab49-26cd3332ca30
Yes#b2b8ab16-bdd9-4482-ab49-26cd3332ca30_Yes



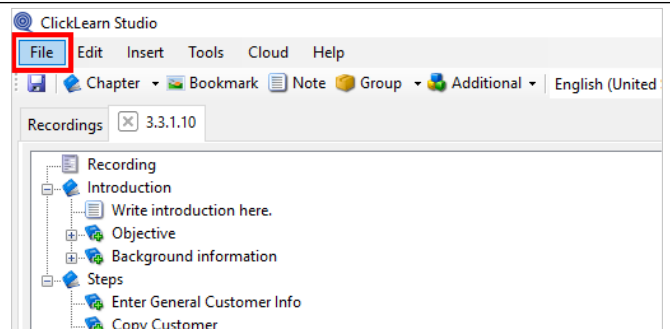
Click on **No**



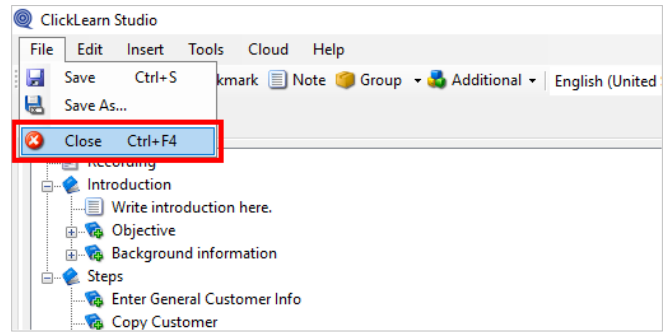
Click on **#b2b8ab16-bdd9-4482-ab49-26cd3332ca30**



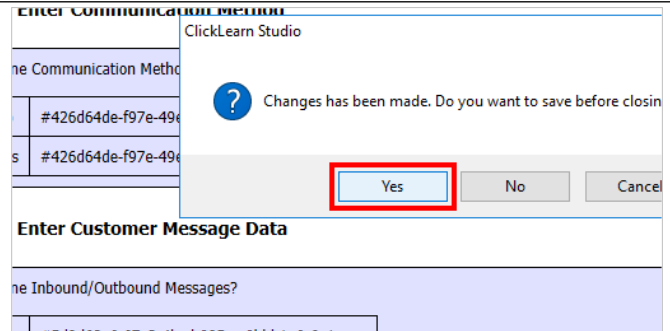
Click on the menu **File**.
 You may also press **Alt+F**.



Click on the menu **Close**.



Click on the button **Yes**.
You may also press **Alt+Y**.

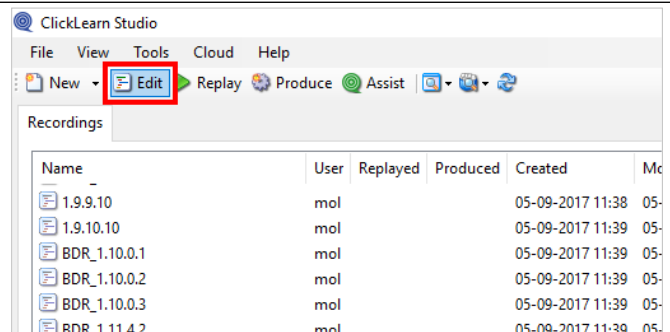


13.5.3.4. Processes

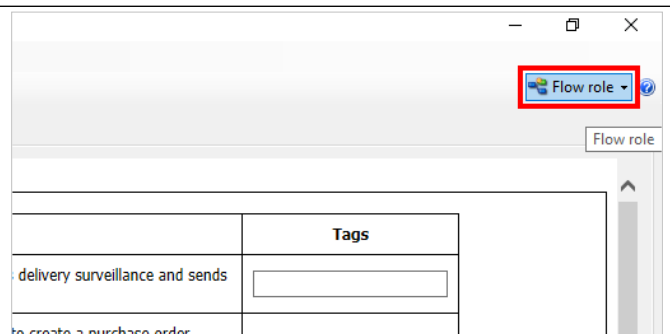
Click on the list element **Acme7.1**.



Click on the button **Edit**.
You may also press **Alt+D**.

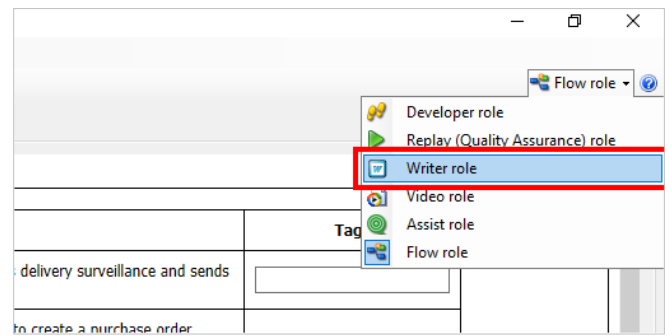


Click on the menu **Flow role**.

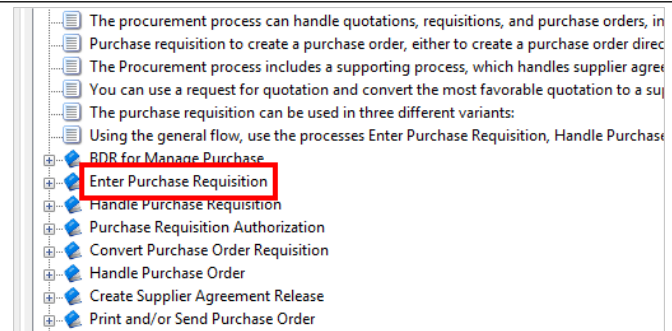


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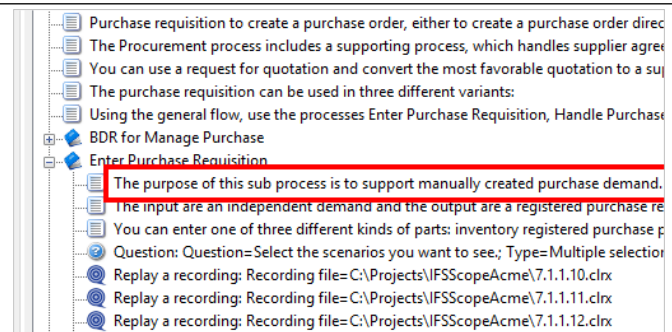
Click on the menu **Writer role**.



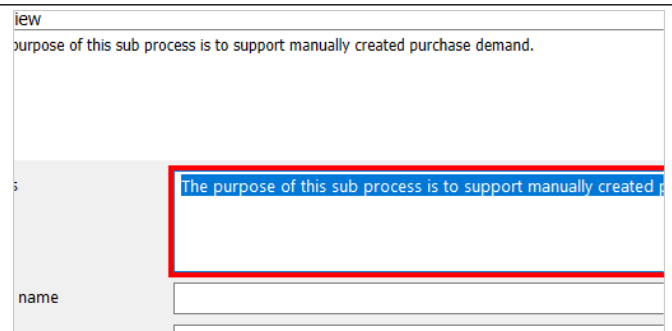
Click on the folder **Enter Purchase Requisition**.



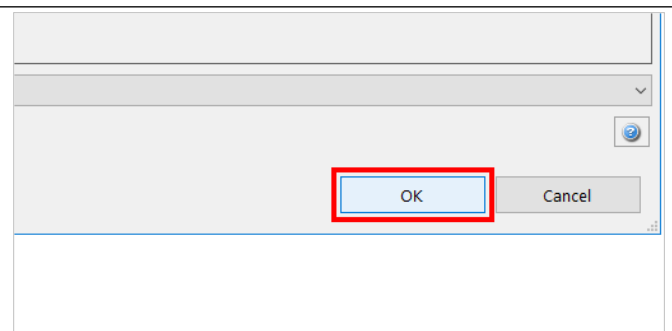
Double click on the folder **The purpose of this sub process is to support manually created purchase demand..**



Click on the input field **Notes**.

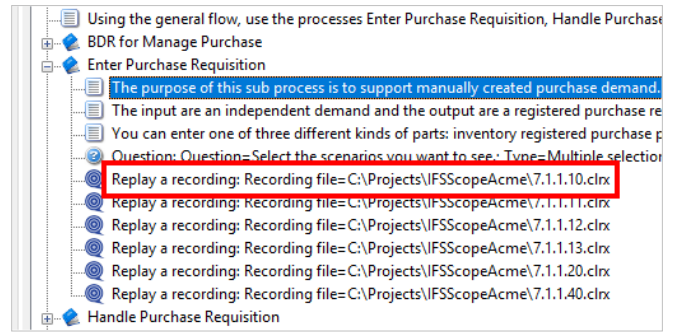


Click on the button **OK**.
You may also press **Alt+O**.

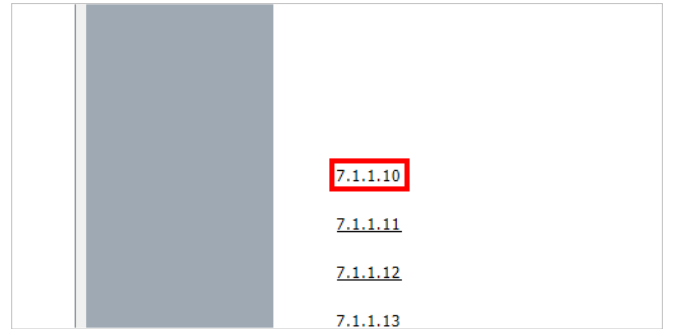


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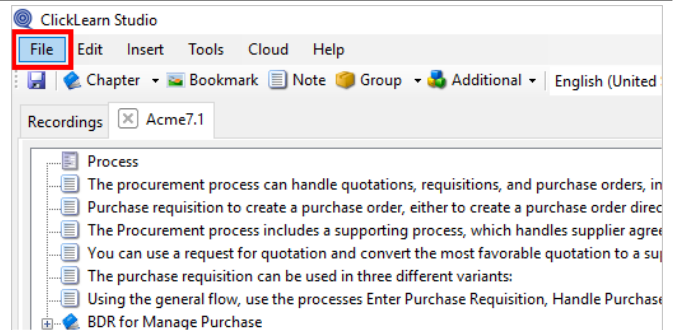
Click on the folder **Replay a recording: Recording file=C:\Projects\IFSScopeAcme\7.1.1.10.clrx**.



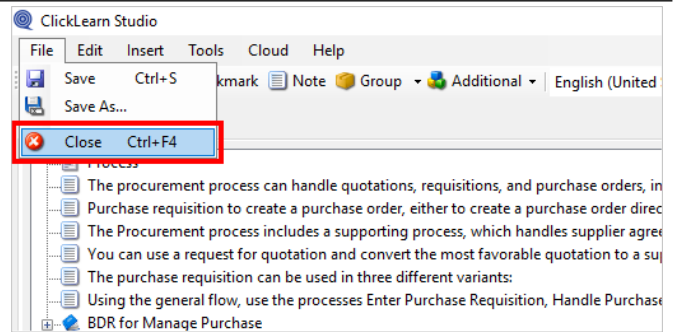
Move the mouse to the link **7.1.1.10**



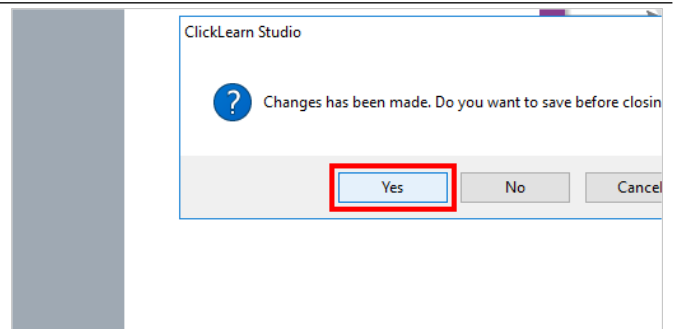
Click on the menu **File**.
You may also press **Alt+F**.



Click on the menu **Close**.



Click on the button **Yes**.
You may also press **Alt+Y**.



13.5.3.5. Books

Click on the list element **AcmeProcurementManagement**.

1.10.15.10	mol	05-09-2017 11:39	05-
1.10.15.20	mol	05-09-2017 11:39	05-
1.10.15.30	mol	05-09-2017 11:39	05-
Books			
AcmeSalesManagement	mol	05-09-2017 11:37	05-
AcmeSalesManagement-WI	mol	05-09-2017 11:37	05-
AcmeProcurementManagement	mol	05-09-2017 11:38	05-
AcmeProcurementManagement-WI	mol	05-09-2017 11:38	05-
AcmeWarehouseManagement	mol	05-09-2017 11:38	05-
AcmeWarehouseManagement-WI	mol	05-09-2017 11:38	05-
AcmeFinancialManagement	mol	05-09-2017 11:39	05-
AcmeFinancialManagement-WI	mol	05-09-2017 11:39	05-

Click on the button **Edit**.
You may also press **Alt+D**.

Name	User	Replayed	Produced	Created	Modified
1.9.9.10	mol			05-09-2017 11:38	05-
1.9.10.10	mol			05-09-2017 11:39	05-
BDR_1.10.0.1	mol			05-09-2017 11:39	05-
BDR_1.10.0.2	mol			05-09-2017 11:39	05-
BDR_1.10.0.3	mol			05-09-2017 11:39	05-
BDR_1.11.4.2	mol			05-09-2017 11:39	05-

Click on the list element **Acme7.1**.

Name	User	Replayed	Produced	Created	Modified
Acme7.1	mol			05-09-2017 11:38	05-09-2017 11:38
Acme2.4	mol			05-09-2017 11:38	05-09-2017 11:38
Acme2.3	mol			05-09-2017 11:37	05-09-2017 11:37

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

Name	User	Replayed	Produced	Created	Modified	Completed
3.3.1.10	mol			05-09-2017 11:37	05-09-2017 11:46	Acme \$
3.3.1.30	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.1.50	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.2.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.3.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$

Click on the menu **Close**.

Name	User	Replayed	Produced	Created	Modified	Completed
3.3.1.10	mol			05-09-2017 11:37	05-09-2017 11:46	Acme \$
3.3.1.30	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.1.50	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.2.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$
3.3.3.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme \$

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Click on the list element
AcmeProcurementManagement-WI.

1.10.15.20	mol	05-09-2017 11:39	05-
1.10.15.30	mol	05-09-2017 11:39	05-
Books			
AcmeSalesManagement	mol	05-09-2017 11:37	05-
AcmeSalesManagement-WI	mol	05-09-2017 11:37	05-
AcmeProcurementManagement	mol	05-09-2017 11:38	05-
AcmeProcurementManagement-WI	mol	05-09-2017 11:38	05-
AcmeWarehouseManagement	mol	05-09-2017 11:38	05-
AcmeWarehouseManagement-WI	mol	05-09-2017 11:38	05-
AcmeFinancialManagement	mol	05-09-2017 11:39	05-
AcmeFinancialManagement-WI	mol	05-09-2017 11:39	05-
AcmeEnd2EndProcesses	mol	05-09-2017 11:39	05-

Click on the button **Edit**.
You may also press **Alt+D**.

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File View **Tools** Cloud Help

New Edit Replay Produce Assist

Recordings

Name	User	Replayed	Produced	Created	Modified
1.9.9.10	mol			05-09-2017 11:38	05-09-2017 11:38
1.9.10.10	mol			05-09-2017 11:39	05-09-2017 11:39
BDR_1.10.0.1	mol			05-09-2017 11:39	05-09-2017 11:39
BDR_1.10.0.2	mol			05-09-2017 11:39	05-09-2017 11:39
BDR_1.10.0.3	mol			05-09-2017 11:39	05-09-2017 11:39
RDR_1.11.4.2	mol			05-09-2017 11:39	05-09-2017 11:39

Click on the list element **7.1.12.10.**

Name	User	Replayed	Produced	Created	Modified
7.1.12.10	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.10.30	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.10.20	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.10.12	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.10.11	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.10.10	mol			05-09-2017 11:38	05-09-2017 11:38
7.1.9.40	mol			05-09-2017 11:38	05-09-2017 11:38

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

ClickLearn Studio

File Edit Tools Cloud Help

Recordings AcmeProcurementManagement-WI

Available recordings

Name	User	Replayed	Produced	Created	Modified	Completed
3.3.1.10	mol			05-09-2017 11:37	05-09-2017 11:46	Acme S
3.3.1.30	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.1.50	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.2.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.3.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S

Click on the menu **Close**.

ClickLearn Studio

File Edit Tools Cloud Help

Save Ctrl+S

Save As...

Close Ctrl+F4

Recordings AcmeProcurementManagement-WI

Available recordings

Name	User	Replayed	Produced	Created	Modified	Completed
3.3.1.10	mol			05-09-2017 11:37	05-09-2017 11:46	Acme S
3.3.1.30	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.1.50	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.2.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S
3.3.3.10	mol			05-09-2017 11:37	05-09-2017 11:37	Acme S

13.5.3.6. Shelf

Click on the list element **AcmeSolutionOverview**.

AcmeWarehouseManagement-WI	mol	05-09-2017 11:38	05-
AcmeFinancialManagement	mol	05-09-2017 11:39	05-
AcmeFinancialManagement-WI	mol	05-09-2017 11:39	05-
AcmeEnd2EndProcesses	mol	05-09-2017 11:39	05-
AcmeEnd2EndProcesses-WI	mol	05-09-2017 11:39	05-
Shelfs			
AcmeSolutionOverview	mol	05-09-2017 11:39	05-
Process			
Acme3.3	mol	05-09-2017 11:37	05-
Acme3.4	mol	05-09-2017 11:37	05-
Acme5.1	mol	05-09-2017 11:37	05-
Acme2.3	mol	05-09-2017 11:37	05-

Click on the button **Edit**.
You may also press **Alt+D**.

ClickLearn Studio

File View Tools Cloud Help

New Edit Replay Produce Assist

Recordings

Name	User	Replayed	Produced	Created	Mo
1.9.9.10	mol			05-09-2017 11:38	05-
1.9.10.10	mol			05-09-2017 11:39	05-
BDR_1.10.0.1	mol			05-09-2017 11:39	05-
BDR_1.10.0.2	mol			05-09-2017 11:39	05-
BDR_1.10.0.3	mol			05-09-2017 11:39	05-
RDR_1.11.4.2	mol			05-09-2017 11:39	05-

Click on the list element **Processes**.

Name	User	Replayed	Produced	C
Processes				
AcmeSalesManagement	mol		0	
AcmeProcurementManagement	mol		0	
AcmeWarehouseManagement	mol		0	
AcmeFinancialManagement	mol		0	
AcmeEnd2EndProcesses	mol		0	
Work Instructions				

Click on the list element **Work Instructions**.

Name	User	Replayed	Produced	C
Processes				
AcmeSalesManagement	mol		0	
AcmeProcurementManagement	mol		0	
AcmeWarehouseManagement	mol		0	
AcmeFinancialManagement	mol		0	
AcmeEnd2EndProcesses	mol		0	
Work Instructions				
AcmeSalesManagement-WI	mol		0	
AcmeProcurementManagement-WI	mol		0	
AcmeWarehouseManagement-WI	mol		0	
AcmeFinancialManagement-WI	mol		0	
AcmeEnd2EndProcesses-WI	mol		0	

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

ClickLearn Studio

File Edit Tools Cloud Help

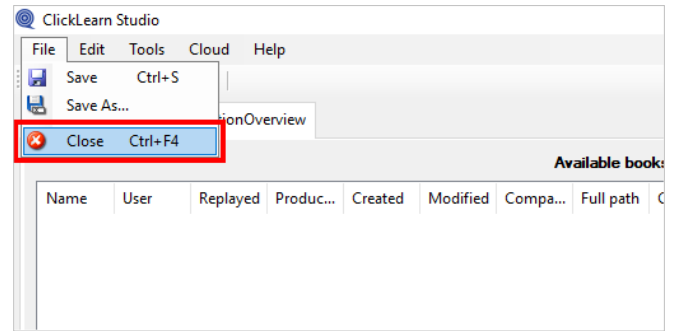
Chapter

Recordings AcmeSolutionOverview

Available books

Name	User	Replayed	Produc...	Created	Modified	Compa...	Full path	C
------	------	----------	-----------	---------	----------	----------	-----------	---

Click on the menu **Close**.

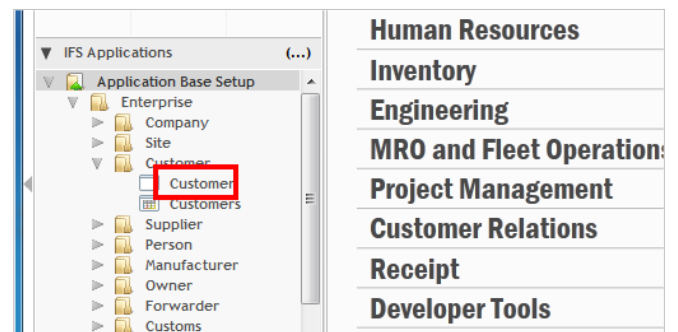


14. Sample recordings

14.1. IFS Create new customer

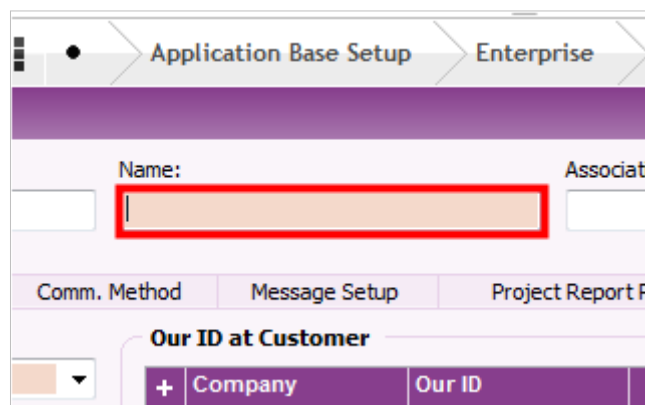
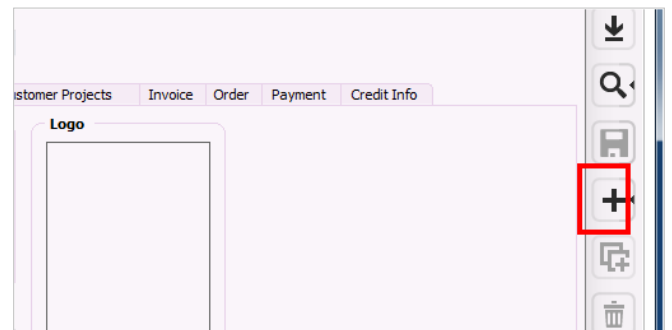
14.1.1. Navigation

Navigate to **Application Base Setup, Enterprise, Customer, Customer**.



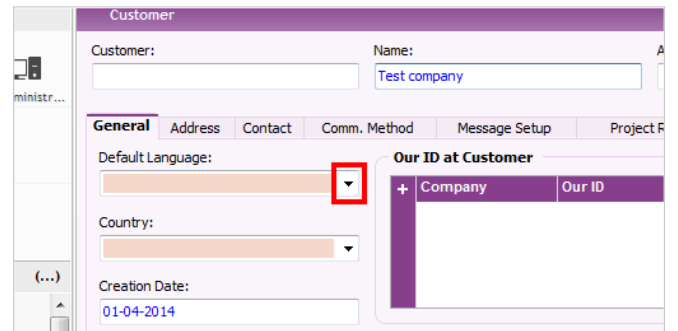
14.1.2. New customer

Click on the tool strip item **New**.
You may also press **F5**.

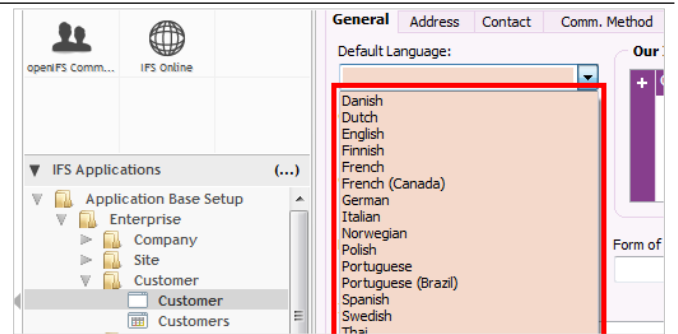


1. Click on the data field **Name**. - Enter **Name**.

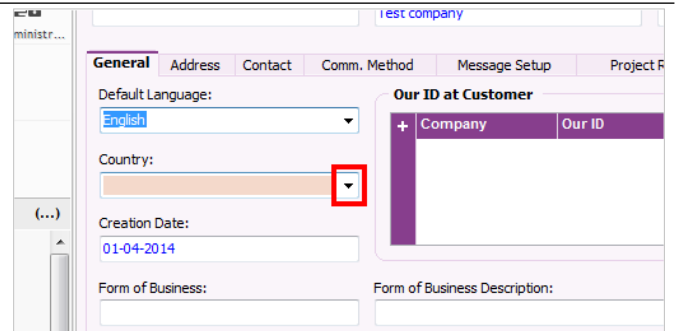
Click on the drop down button **Default Language**.



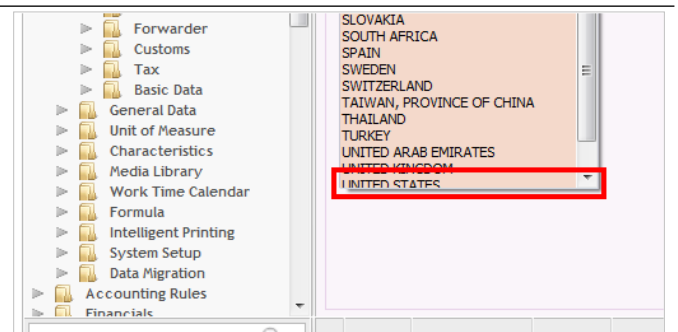
Click on any **Default Language** from the list.



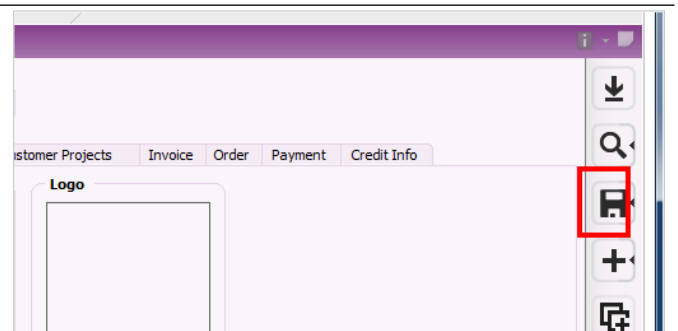
Click on the drop down button **Country**.



Click on the selection item **UNITED STATES**.

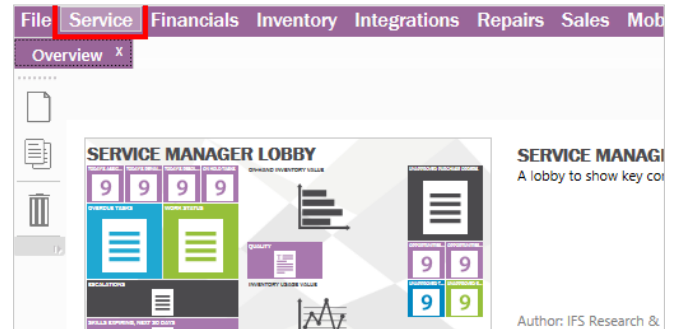


Move the mouse to the tool strip item **Save**.
You may also press **Ctrl + S** or **F12**.

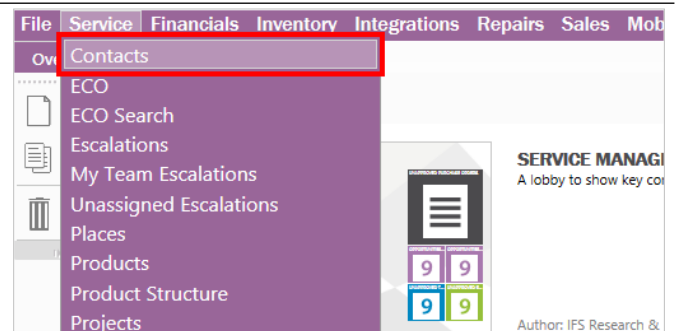


14.2.IFS FSM Contacts

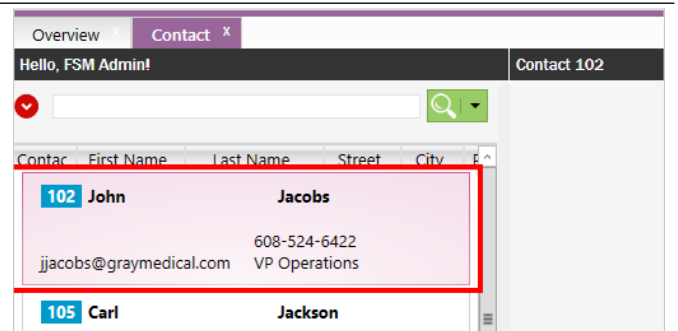
Click on the menu item **Service**.



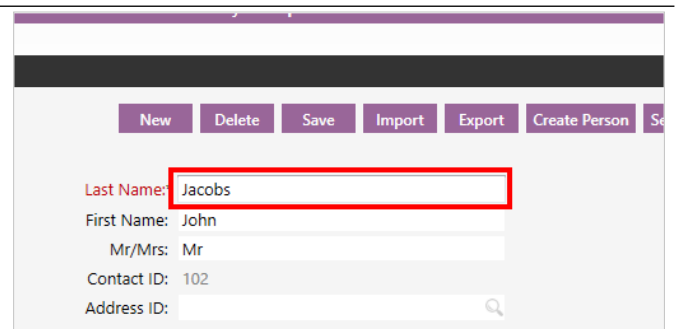
Navigate to the menu **Service, Contacts**.



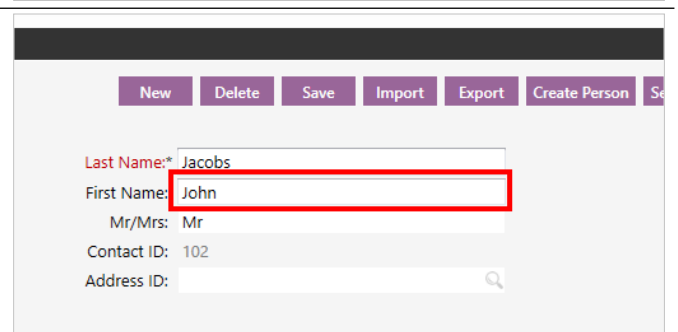
Click on the list item **102** where **Contact ID = 102**, **First Name = John**, **Last Name = Jacobs**.



Click on the text field **Last Name**.



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



Click on the text field **Mr/Mrs.**

Last Name:* Jacobs
 First Name: John
 Mr/Mrs: **Mr**
 Contact ID: 102
 Address ID:
 Address:

Click on the text field **Work Phone.**

Work Phone: **608-524-6422**
 Extension:
 Mobile Phone: 608-524-6400
 Home Phone:
 Email: jjacobs@graymedical.com

Click on the text field **Mobile Phone.**

Work Phone: 608-524-6422
 Extension:
 Mobile Phone: **608-524-6400**
 Home Phone:
 Email: jjacobs@graymedical.com
 Alt Email:
 Comments: Key Influencer

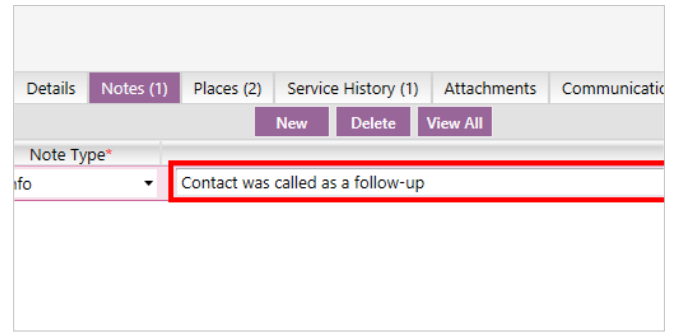
Click on the tab **Details.**

Jackson 262-798-8560 IT Mgr	Address ID: Address: <input type="button" value="Details"/> <input type="button" value="Notes (1)"/> <input type="button" value="Places (2)"/> <input type="button" value="Service History (1)"/> Image:
Davidson 858-576-1801 Sales Rep	
Larson 424-456-2345	

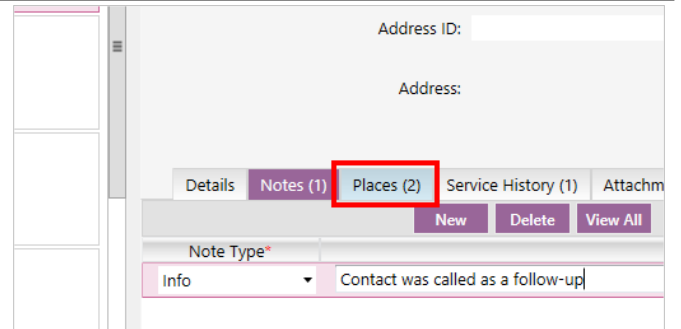
Click on the tab **Notes (1).**

Jackson 262-798-8560 IT Mgr	Address ID: Address: <input type="button" value="Details"/> <input type="button" value="Notes (1)"/> <input type="button" value="Places (2)"/> <input type="button" value="Service History (1)"/> Image:
Davidson 858-576-1801 Sales Rep	
Larson 424-456-2345	

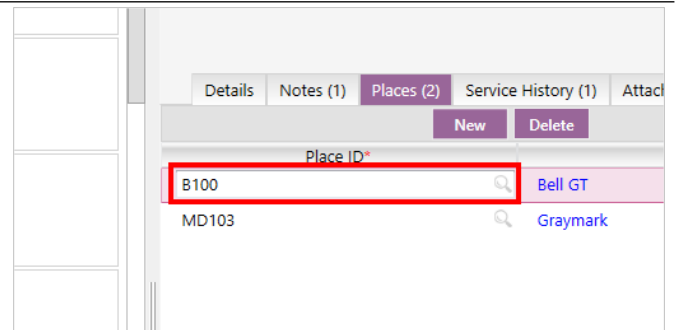
Click on the textbox in the column **TextEditor**.



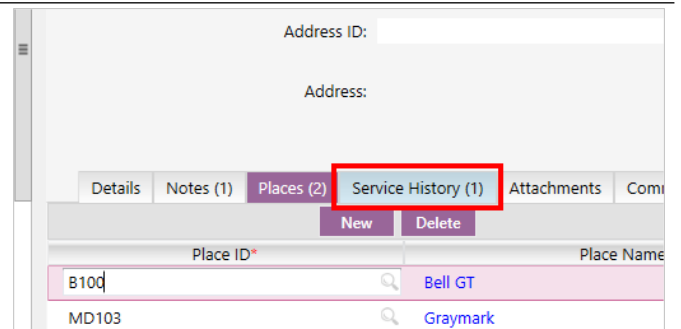
Click on the tab **Places (2)**.



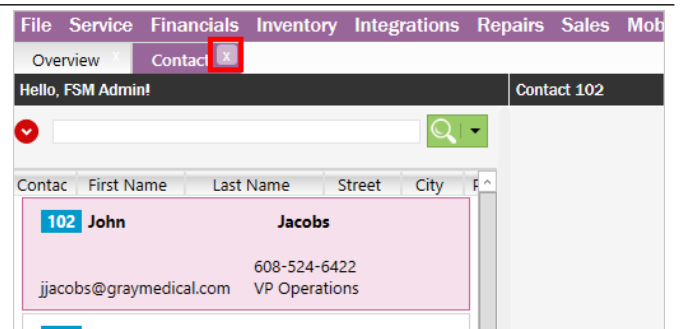
Click on the textbox in the column **Place ID**.



Click on the tab **Service History (1)**.

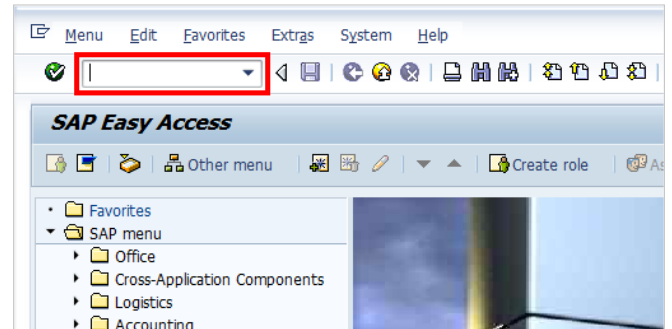


Click on the close button on the tab **Contact**.

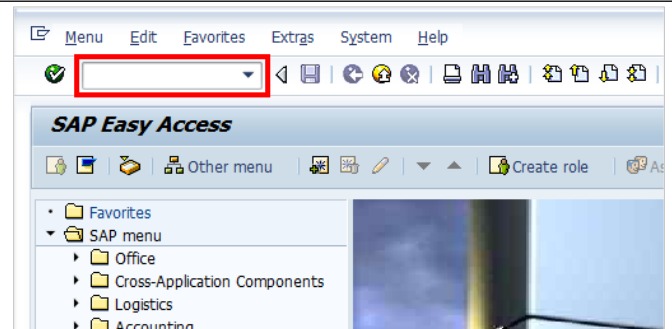


14.3.SAP Display Account

Click on the transaction code field on the toolbar

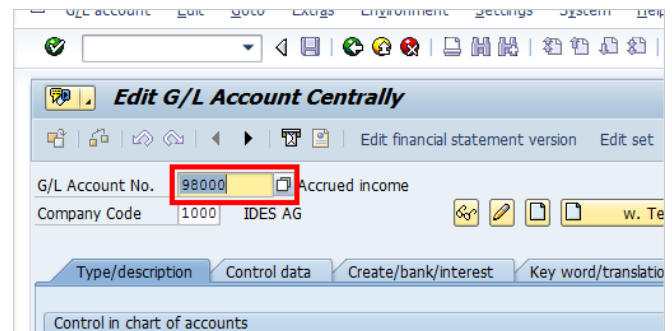


Enter the text **fs00**. Press the **Enter** key.

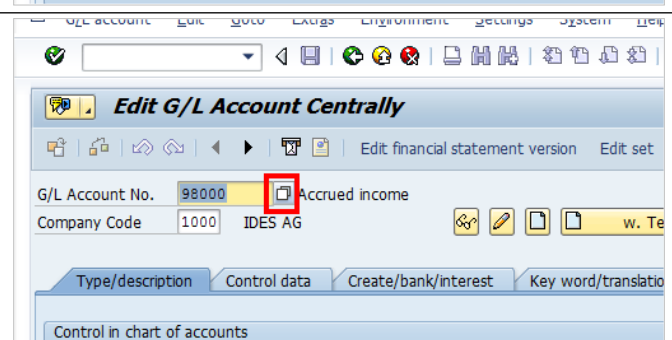


14.3.1. Edit G/L Account Centrally

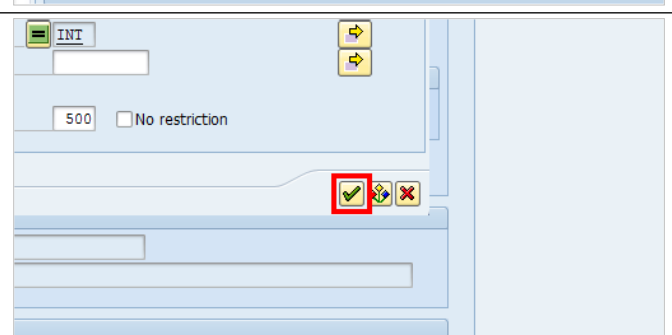
Click on the text field **G/L Account No.**



Click on the search button to the right of **G/L Account No.**



Click the button **Continue** on the toolbar



Click on the label **98000**

- affiliates	INT	145000
- Company 03 (adj acct.)	INT	114104
- other companies long term	INT	145020
- subsidiaries	INT	144000
- Subsidiaries, long-term	INT	144020
consignment sale	INT	149900
- other companies (adj acct.)	INT	145099
- subsidiaries (adj acct.)	INT	144099
	INT	98000
	INT	98100
estate and similar rights	INT	1010
ation-franchises	INT	35010
ation - fixtures and fittings	INT	21010
ation - machinery and equipment	INT	11010
ation-buildings	INT	2010
ation-constructions	INT	11020

Click the button **Copy** on the toolbar

Accumulated depreciation - fixtures and fittings	INT	21010
Accumulated depreciation - machinery and equipment	INT	11010
Accumulated depreciation-buildings	INT	2010
Accumulated depreciation-constructions	INT	11020
Adj. Payabl. CC 1000	INT	164101
Adjust.- customer receivables to company code 2200	INT	144106
Adjust. Receiv. Company Code 1000	INT	144101
Adjust. Receiv. Company Code 2000	INT	144102
Adjust. Receiv. Company Code 3000	INT	144103

Toolbar:

Click the button **Continue** on the toolbar

G/L account Edit Goto Extras Environment Settings System Help

Edit G/L Account Centrally

G/L Account No. **98000** Accrued income
Company Code **1000** IDES AG

Type/description Control data Create/bank/interest Key word/translatio

Select the tab named **Create/bank/interest**

Display G/L Account Centrally

G/L Account No. **98000** Accrued income
Company Code **1000** IDES AG

Type/description **Create/bank/interest** Key word/translatio

Control in chart of accounts
Account group General G/L accounts
Sample account

P&L statement acct

Select the tab named **Type/description**

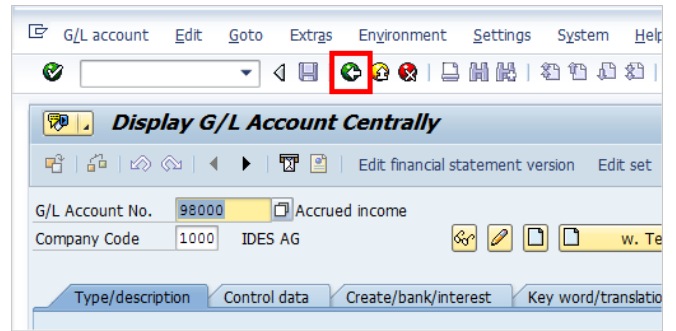
Display G/L Account Centrally

G/L Account No. **98000** Accrued income
Company Code **1000** IDES AG

Type/description Control data Create/bank/interest Key word/translatio

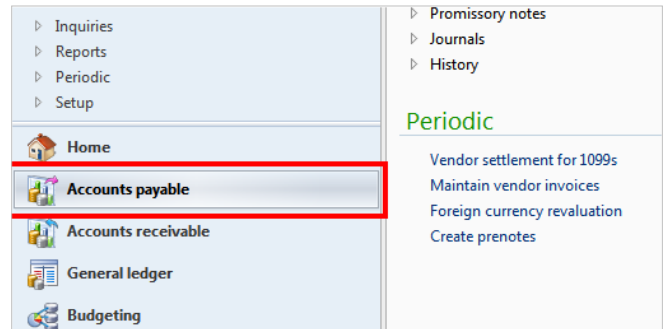
Control of document creation in company code
Field status group **G013** General (obligatory text)
 Post automatically only
 Supplement auto. postings

Click the button **Back** on the toolbar

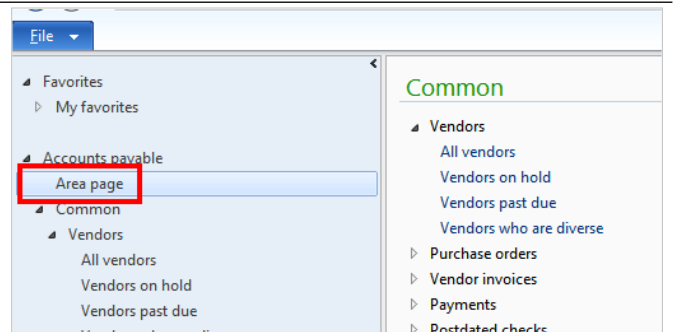


14.4.AX Vendor edit

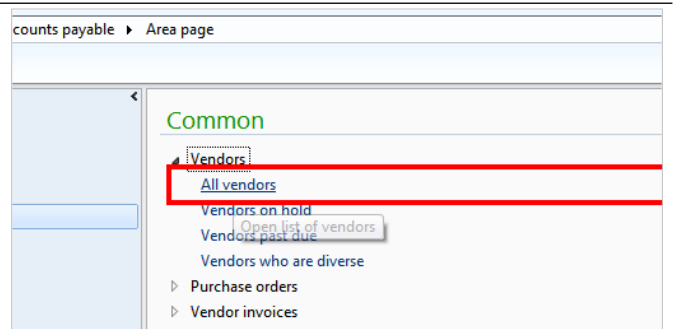
Click on the navigation button **Accounts payable**



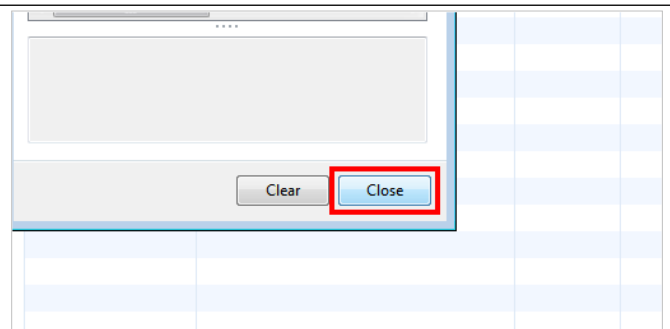
Click on the navigation item **Area page**



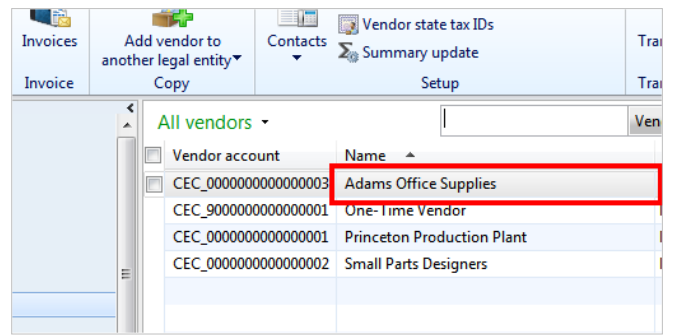
Click on area page link **All vendors**



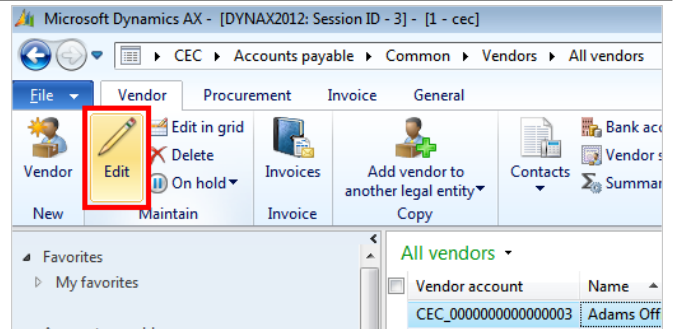
Click on the button **Close**



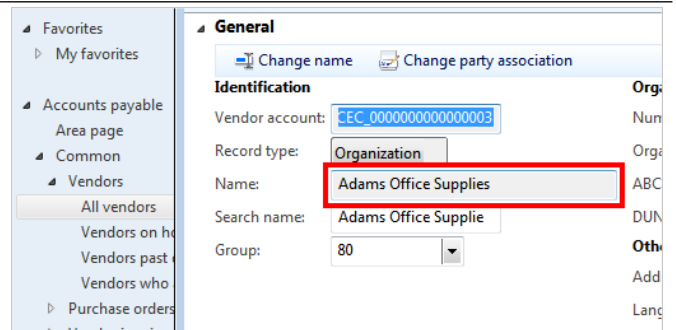
Click on the cell **Name** with the value **Adams Office Supplies**



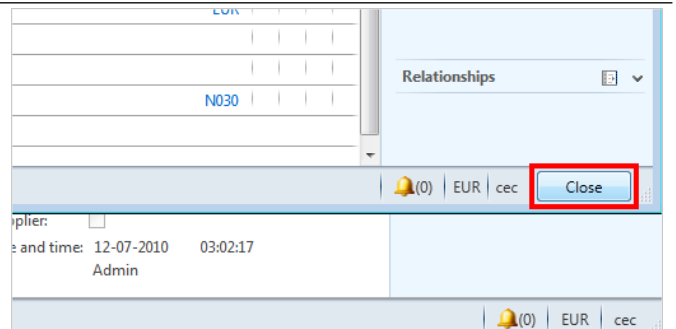
Click on the ribbon item **Edit**



Click on the field **Name**

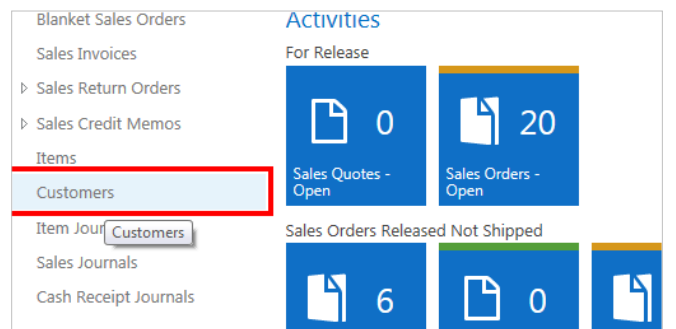


Click on the button **Close**

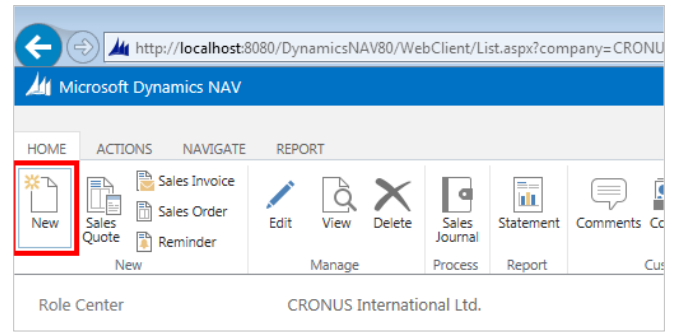


14.5.NAV Web new customer

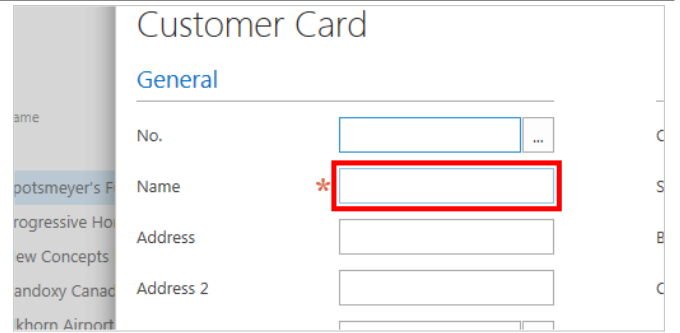
Click on the link **Customers**



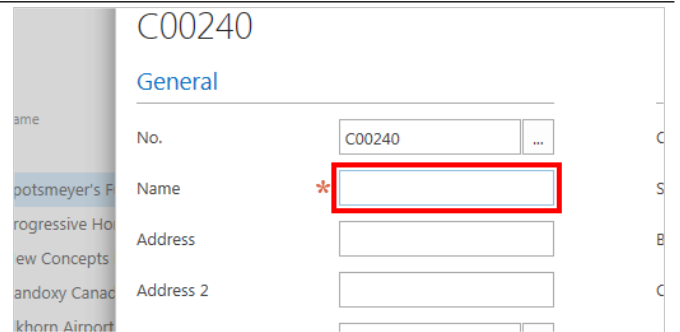
Click on the ribbon item **New**



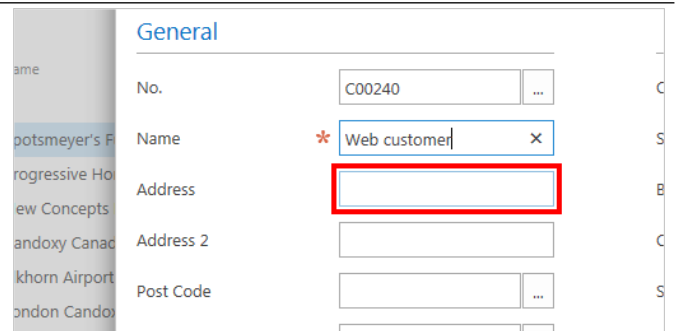
Click on the input field **Name**



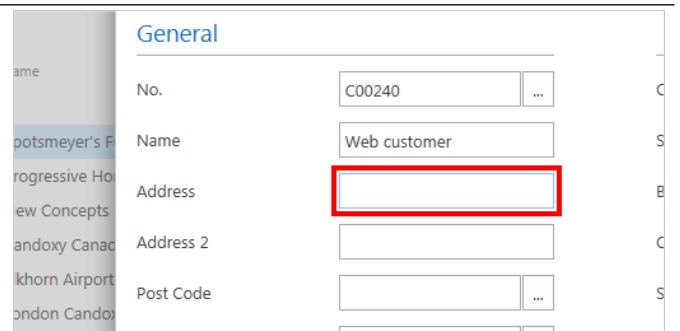
Enter **Name**.



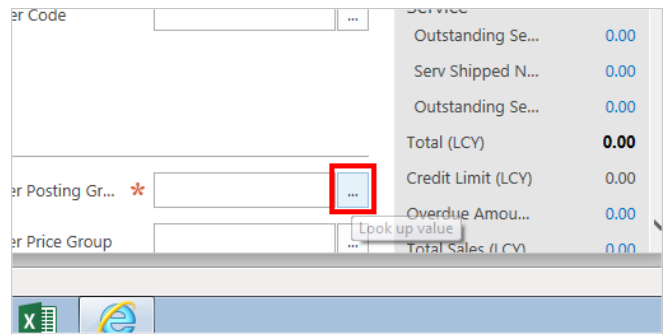
Click on the input field **Address**



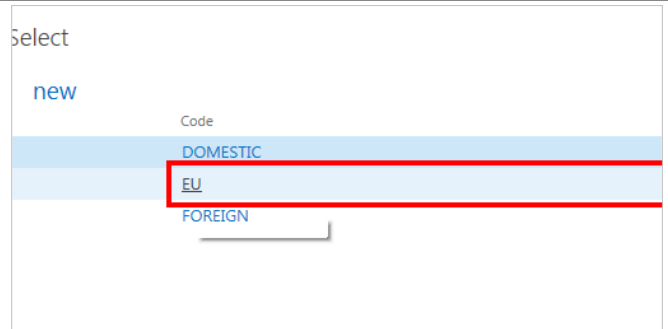
Enter **Address**.



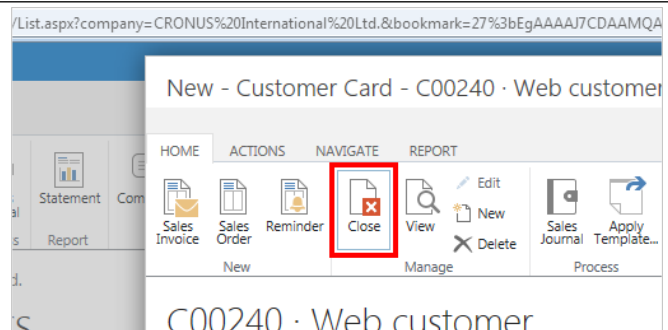
Click on the lookup button **Customer Posting Group**



Click on the cell **Code = EU**



Click on the ribbon item **Close**



14.6.NAV 2013 Customer statistics and export to Excel

14.6.1. Introduction

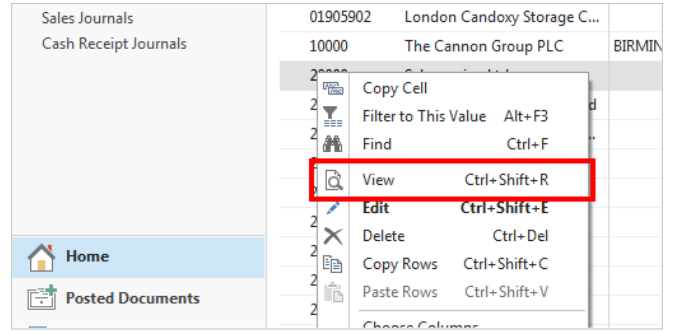
This process will show how to find the statistics of a customer and export a list to excel.

14.6.2. Navigation

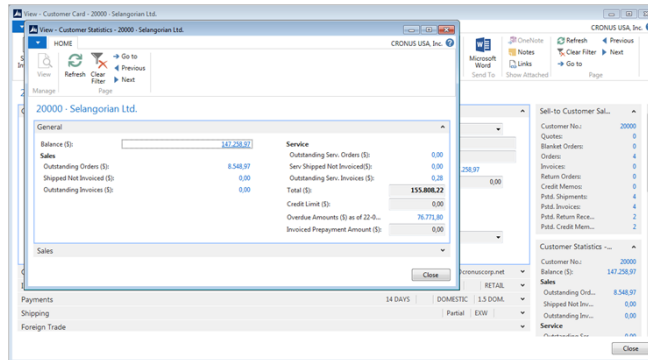
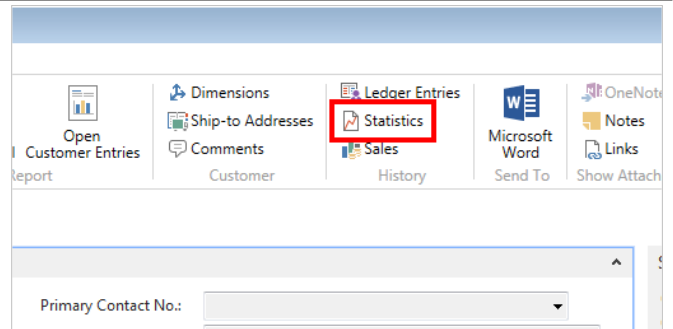
No.	Name	Responsi...	Location ...
01121212	Spotsmeyer's Furnishings		YELLOW
01445544	Progressive Home Furnishi...		YELLOW
01454545	New Concepts Furniture		YELLOW
01905893	Candoxy Canada Inc.		YELLOW
01905899	Elkhorn Airport		YELLOW
01905902	London Candoxy Storage C...		YELLOW
10000	The Cannon Group PLC	BIRMINGH...	BLUE
20000	Jangorian Ltd.		
20309920	Metatorad Malaysia Sdn Bhd		YELLOW
20312912	Highlights Electronics Sdn ...		GREEN
20339921	TraxTonic Sdn Bhd		YELLOW
21233572	Somadis		YELLOW
21245278	Maronegoce		BLUE
21252947	ElectroMAROC		YELLOW
27090917	Zanlan Corp.		YELLOW
27321782	Karoo Supermarkets		YELLOW
27489991	Durbandit Fruit Exporters		YELLOW

1. Click on navigation tab **Home**
2. Click on navigation item **Home, Customers**
3. Right click on the cell **No.** with the value **20000**

Click on the context menu item **View**

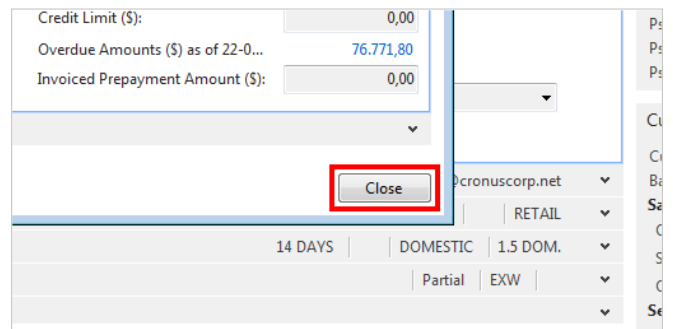


Click on the ribbon button **Statistics**



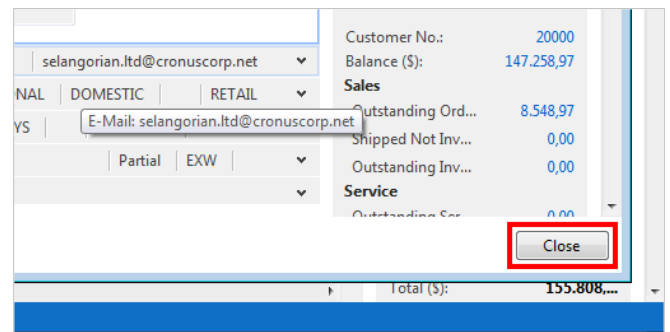
Customer statistics window

Click on the button **Close**



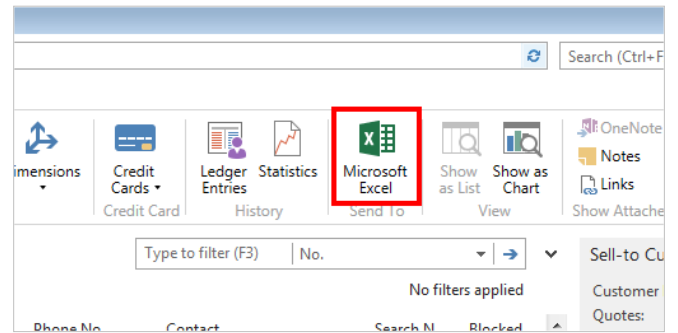
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	August 20, 2019
ClickLearn Learning Portal	308/375

Click on the button **Close**

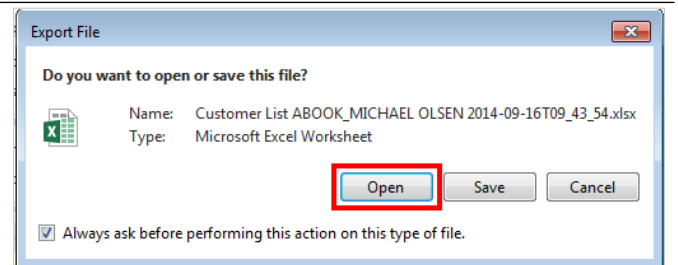


14.6.3. Export customer list to Excel

Click on the ribbon button **Microsoft Excel**



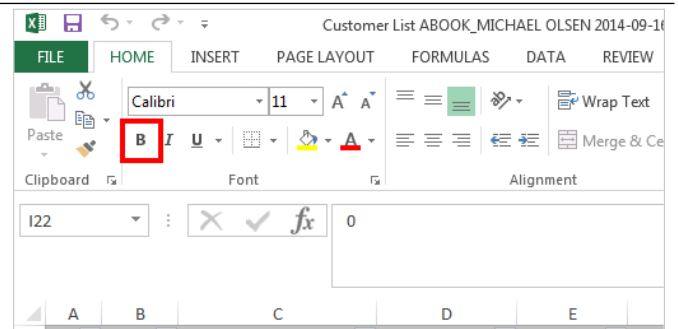
Click on the button **Open**



Click on the cell **I24** with the value **4.788,64**

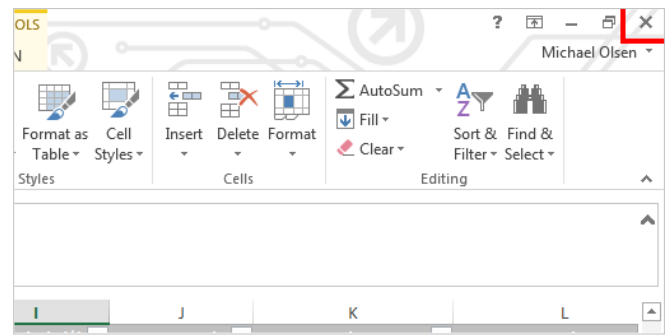
	ELECTROMAROC		0,00	MAD	LAR
	Mr. Derik S ZANLAN CORP.		0,00	ZAR	
	Mr. Pieter KAROO SUPERM,		0,00	ZAR	RET
	Mr. Eric Lar DURBANDIT FRU		0,00	ZAR	LAR
	Miss Patric JOHN HADDOCK		0,00		LAR
	Maryann B. WOONBOULEVA		0,00	EUR	
	Michael Va MEERSEN MEUBE		0,00	EUR	RET
	Rob Verho CANDOXY NEDEF		0,00	EUR	LAR
	Kevin Verb NIEUWE ZANDPC		0,00	EUR	
	Michael Ze ANTARCTICOPY		4.788,64	EUR	RET

Click on the button **Bold**.

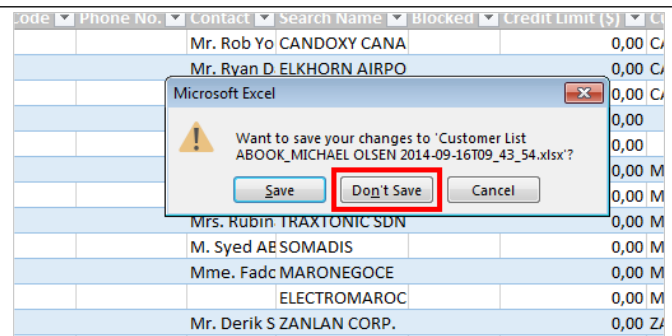


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	August 20, 2019
ClickLearn Learning Portal	309/375

Click on the button **Close**.

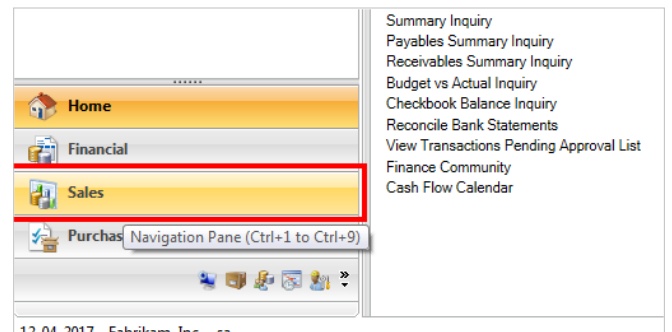


Click on the button **Don't Save**.

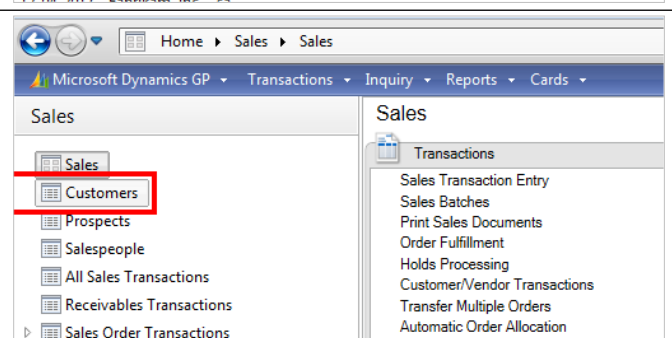


14.7.GP 2013 Customer information

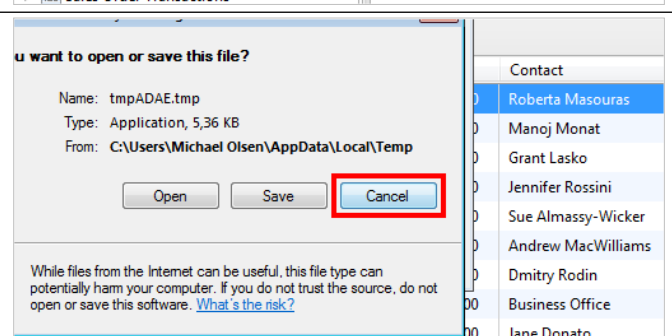
Click on the tab **Sales**.



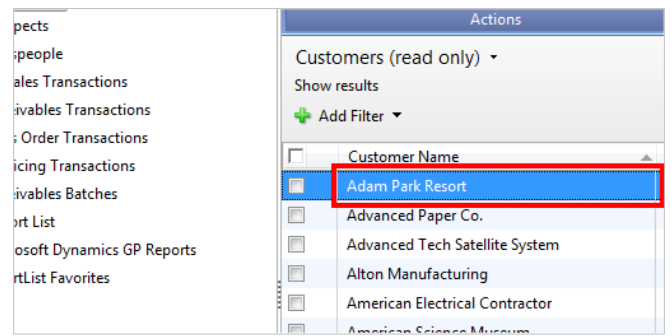
Click on the item **Customers**.



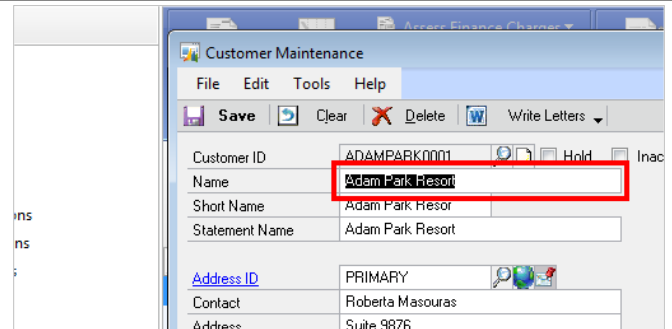
Click on the button **Cancel**.



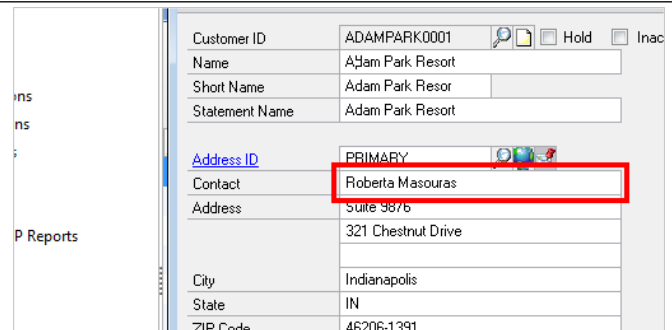
Double click on **Customer Name Row 0**.



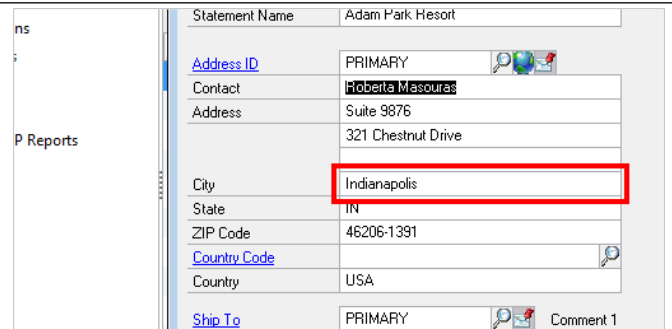
Click on text field **Name**



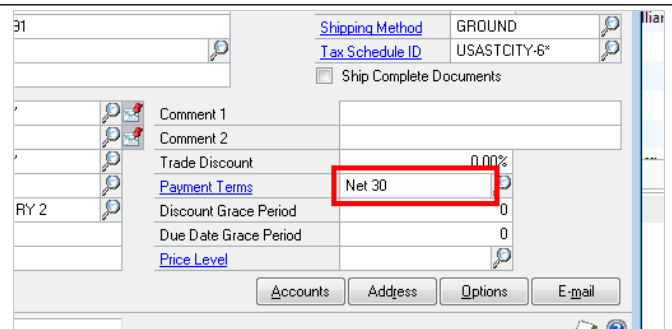
Click on text field **Contact**



Click on text field **City**

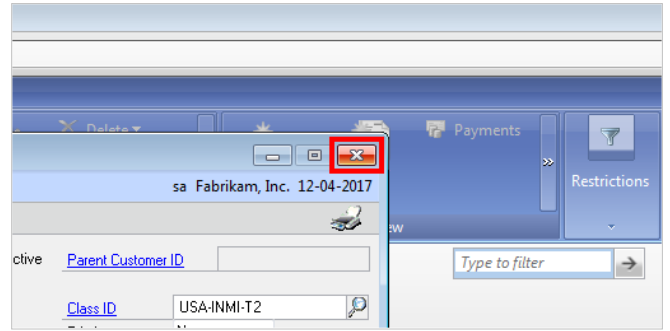


Click on text field **Payment Terms**



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Click on the button **Close**.

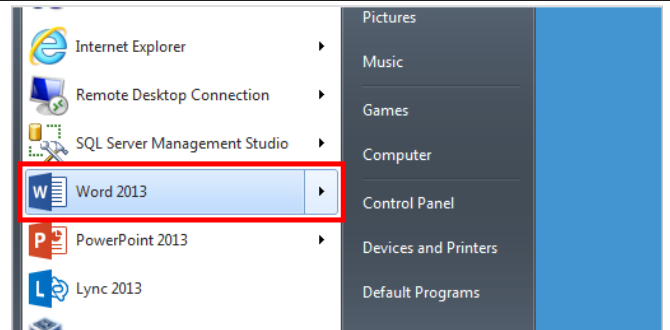


14.8. Word 2013 document sample

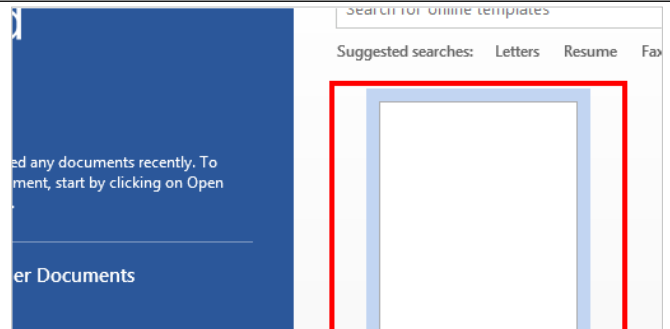
Click on the button **Start**.



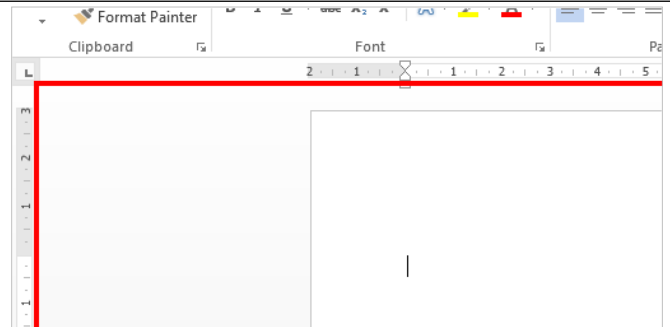
Click on the menu **Word 2013**.



Click on the list element **Blank document**.

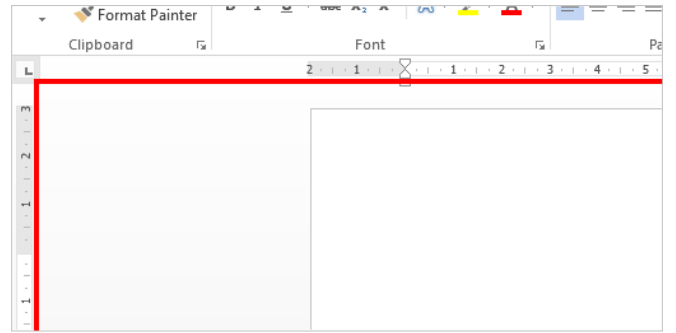


Click on the document

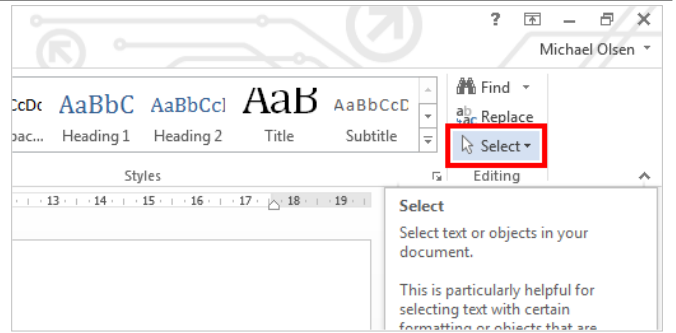


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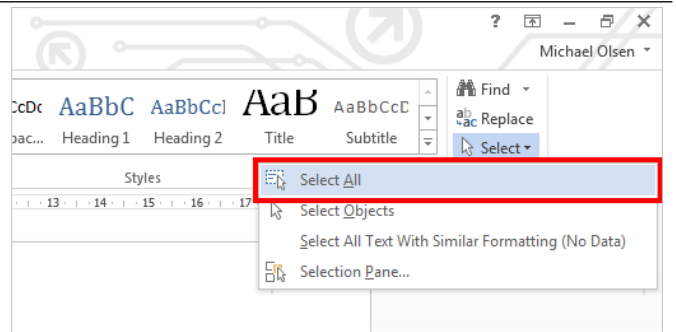
Enter the text **This is a sample document written in Microsoft Word 2013..** Press the **Enter** key.



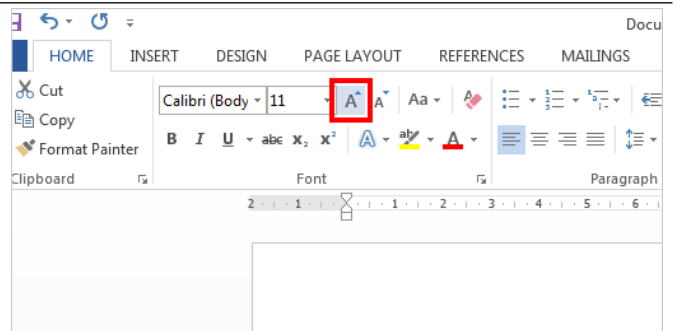
Click on the drop down button **Select**.



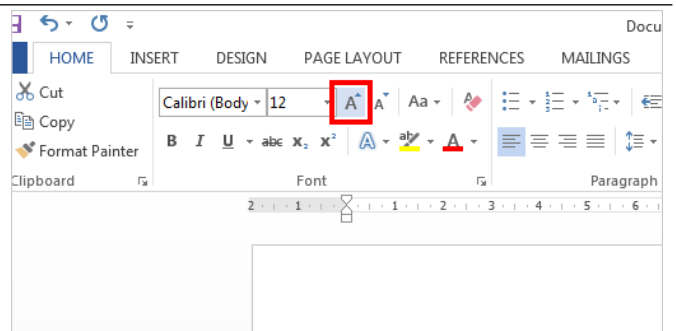
Click on the menu **Select All**.



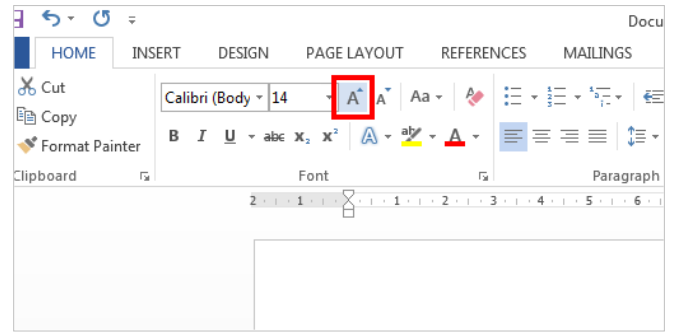
Click on the button **Grow Font**.



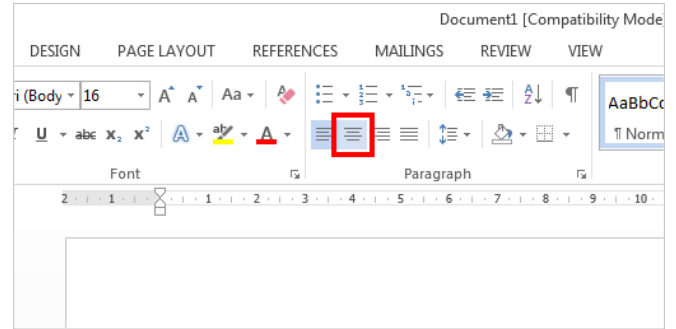
Click on the button **Grow Font**.



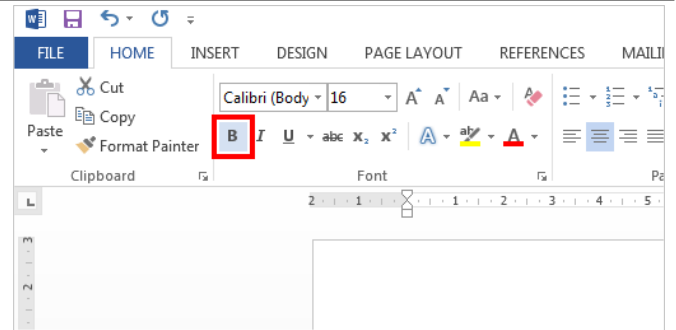
Click on the button **Grow Font**.



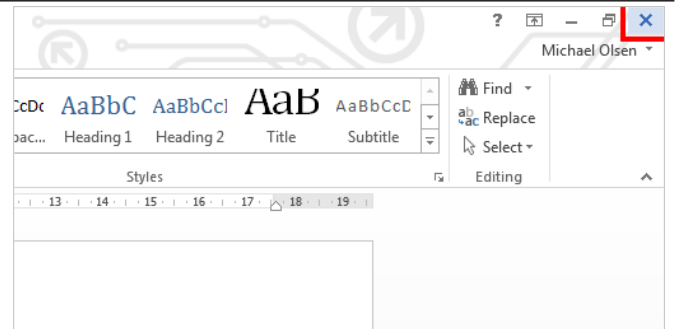
Click on the button **Center**.



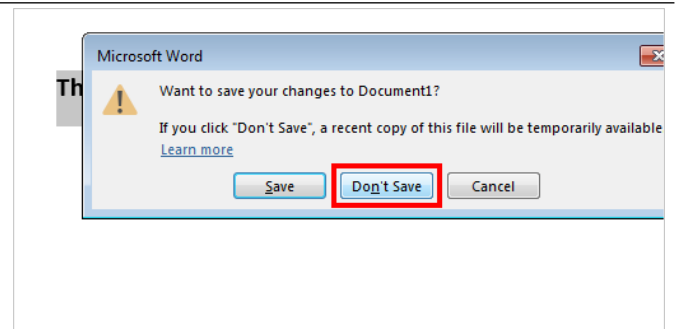
Click on the button **Bold**.



Click on the button **Close**.



Click on the button **Don't Save**.



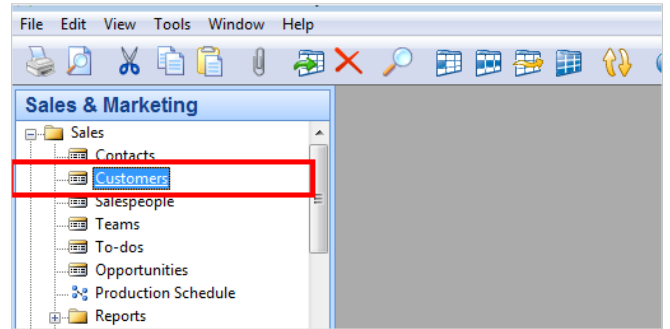
14.9.NAV Classic Work instruction

14.9.1. Objective

This work instruction covers how to work with customer detail information.

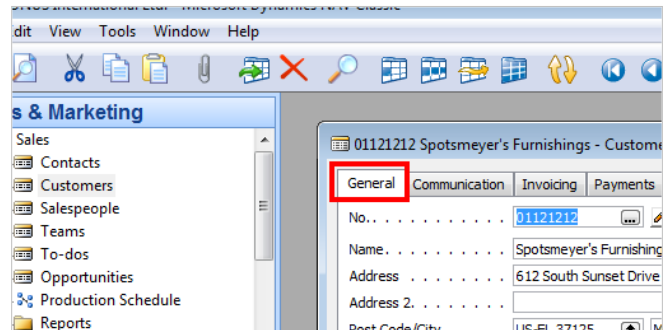
14.9.2. Navigate

Select **Sales, Customers** from the menu **Sales & Marketing** in the Navigation Pane



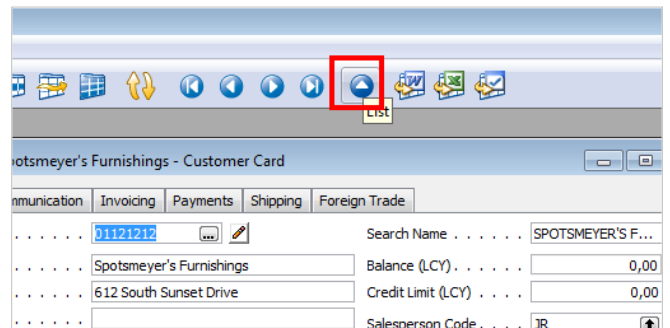
14.9.3. General

Select the tab named **General**

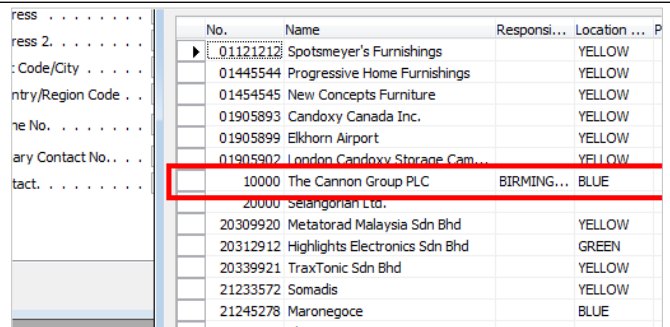


14.9.4. Select from customer list

Click **List** on the toolbar

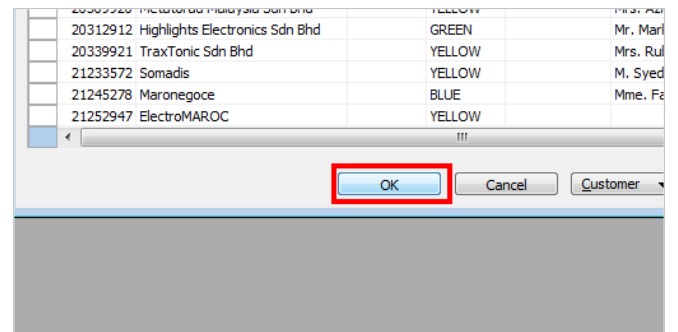


Click on row '10000'



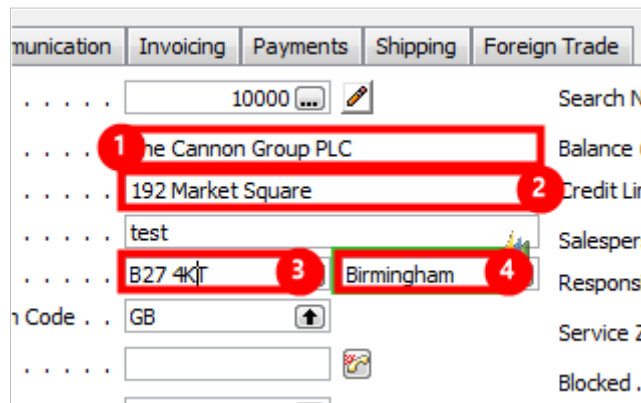
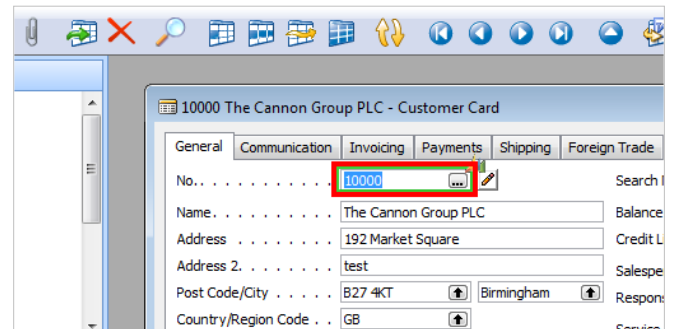
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Click on **OK**



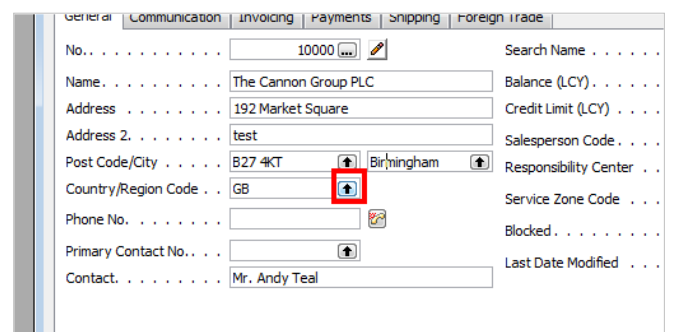
14.9.5. Fields

Click on **No.**

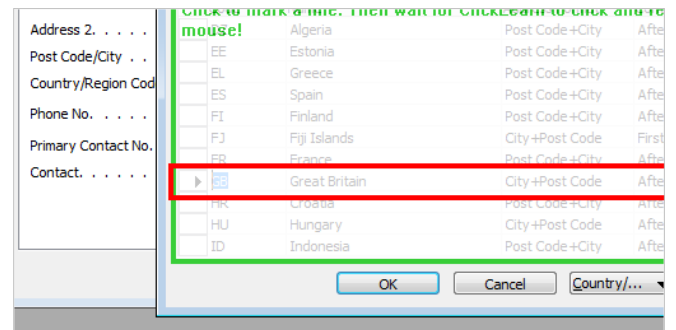


1. Click on **Name**
2. Click on **Address**
3. Click on **Post Code**
4. Click on **City**

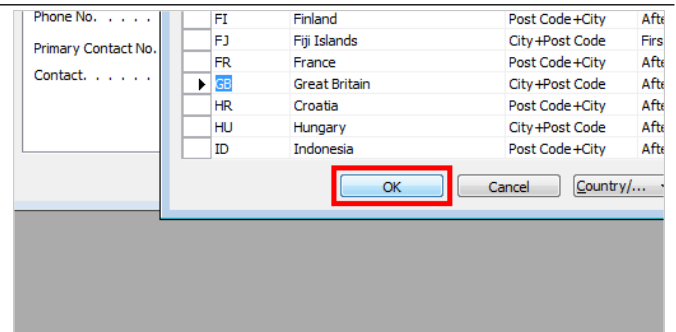
Click **Country/Region Code** lookup



Click on any row

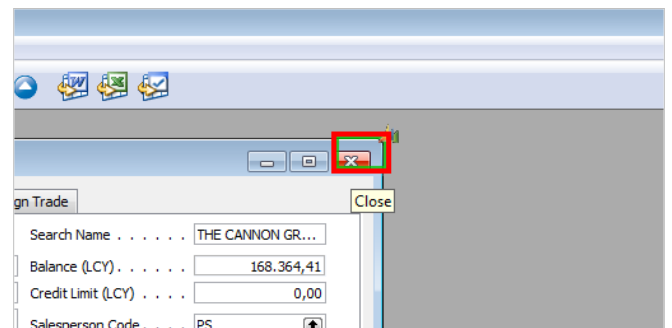


Click on **OK**



Customer card

Close the form **Customer Card**



15. Microsoft Dynamics specific

15.1. Convert to a newer NAV version

15.1.1. Introduction

When you upgrade your NAV system from 2013 to 2015, 2015 to 2016 or even from 2009 directly to 2016, you will also need to update your work instructions and training material.

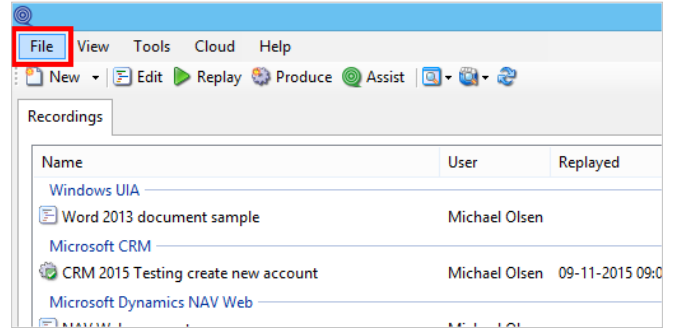
ClickLearn offers a near to automatic converter, which will convert a recording from one version to a higher one.

The conversion will transform various steps where the user interface controls have changed in NAV.

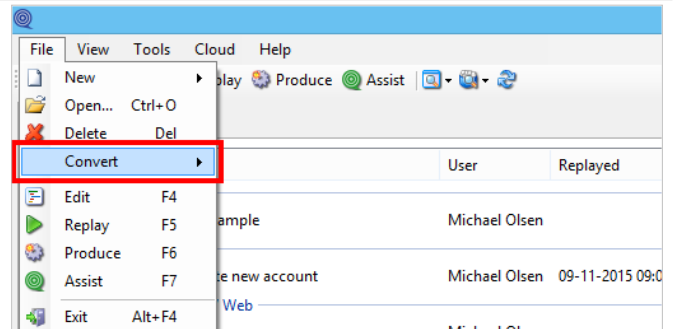
15.1.2. Convert a new recording

Please note, that you may select multiple recordings for conversion.

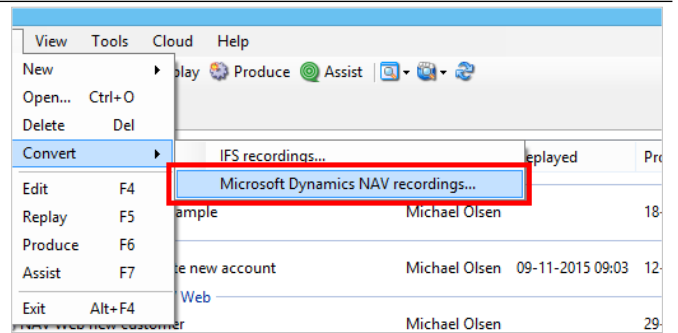
Click on the menu **File**.
You may also press **Alt+F**.



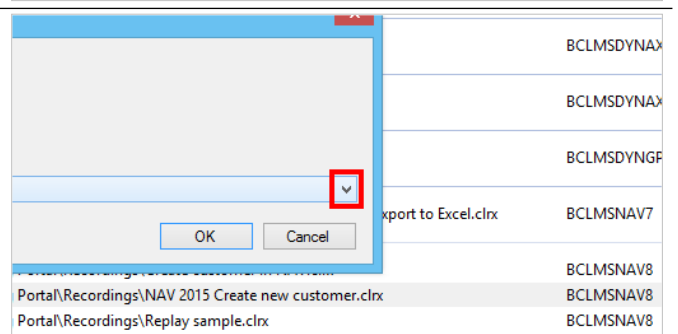
Click on the menu **Convert**.



Click on the menu **Microsoft Dynamics NAV recordings....**



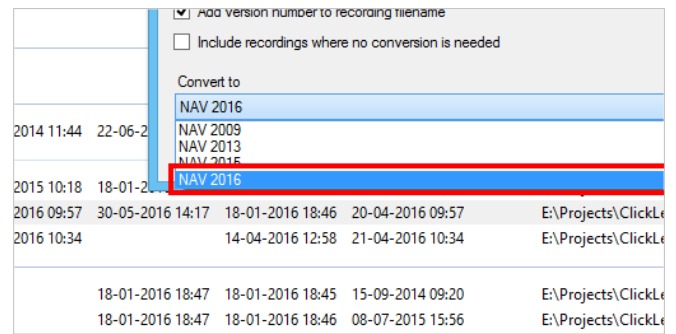
Click on the button **Convert to**.
You may also press **Alt+Down Arrow**.



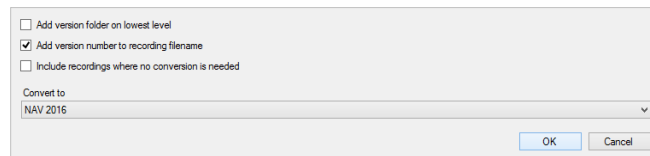
Here you see a list of the supported NAV versions.

Please note, that no conversion is performed if you try to convert a recording to a lower NAV version.

Click on the list element **NAV 2016**.



15.1.3. Version handling



When you convert a recording, no changes will be done to the source recording.

A new recording will be created and the filename will be set according to the two options available in this dialog.

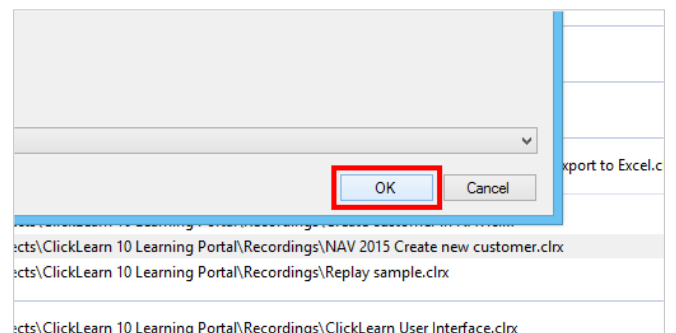
The default checked option to add the version number to the recording makes sure that the new recording is stored in the same location as the source recording.

If you check the option to add version folder to lowest level, the new recording file will be stored in a subfolder named according to the version number.

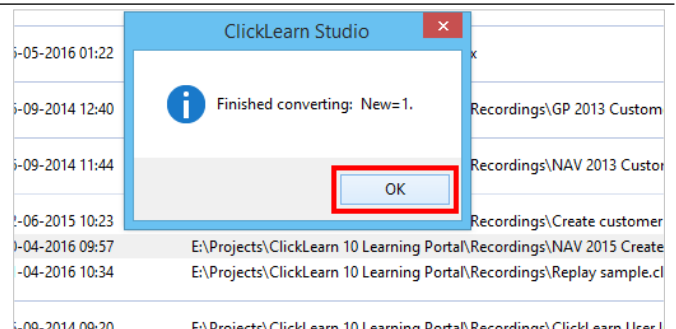
Both option may be selected, creating first a sub folder and then adding the version number to the filename.

15.1.4. Perform the conversion

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



Click on the button **OK**.



Click on the list element **NAV 2015 Create new customer v2016**.

NAV 2013 Customer statistics and export to Excel	Michael Olsen	16-09-2014 11:4
Microsoft Dynamics NAV 2015		
Create customer in NAV	Michael Olsen	22-06-2015 10:1
NAV 2015 Create new customer	Michael Olsen	20-04-2016 09:5
Replay sample	Michael	21-04-2016 10:3
Microsoft Dynamics NAV 2016		
NAV 2015 Create new customer v2016	Michael	
Ungrouped		
ClickLearn User Interface	Michael Olsen	
Edit work instruction	Michael Olsen	
Introduction	Michael Olsen	
License	Michael Olsen	

This is the converted recording, which may now be replayed or used directly in ClickLearn Assist.

15.2. TestPage and Performance Test

15.2.1. Objective

You may transform a ClickLearn recording that has been recorded on a Dynamics NAV Windows client into C/AL TestPage code and Visual Studio Performance C# code.

Depending on the process you have recorded, it may require additional coding or modifications, which has to be done manually afterwards.

15.2.2. How to record

Fields are not recognized if you tab between fields, so remember to click into fields.

Code can only be produced properly if you remember to click into the fields before entering data.

Click into a field without a following keyboard input will validate the current value of the field.

Click into a field with a following keyboard input will set the value of a field.

Actions must be recorded by clicking on the dialog buttons or the ribbon buttons.

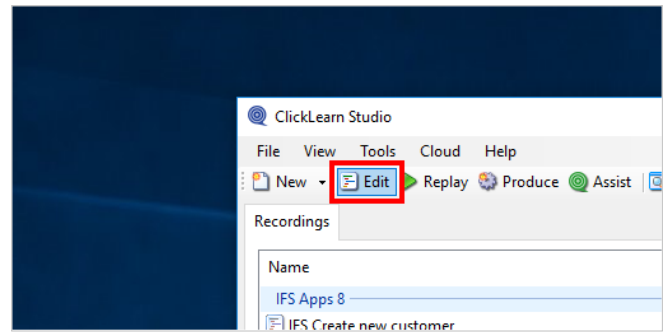
15.2.3. Generate code

Click on the list element **NAV 2015 Create new customer**.

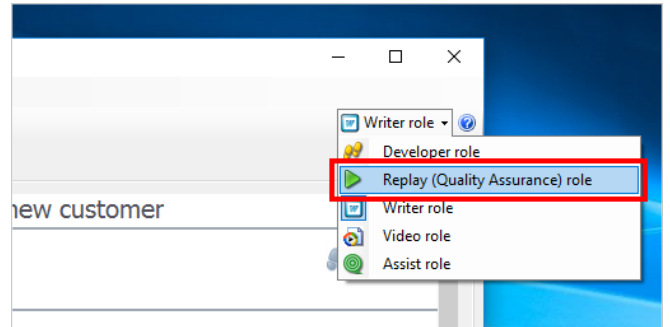
Microsoft Dynamics GP 2013		
GP 2013 Customer information	Michael Ol	
Microsoft Dynamics NAV 2013		
NAV 2013 Customer statistics and export to Excel	Michael Ol	
Microsoft Dynamics NAV 2015		
Create customer in NAV	Michael Ol	
NAV 2015 Create new customer	Michael Ol	
Replay sample	Michael	
Microsoft Dynamics NAV 2016		
NAV 2015 Create new customer v2016	Michael	
Ungrouped		
ClickLearn User Interface	Michael Olsen	
Edit work instruction	Michael Olsen	
Introduction	Michael Olsen	
License	Michael Olsen	

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Click on the button **Edit**.
You may also press **Alt+D**.



Click on the menu **Replay (Quality Assurance) role**.

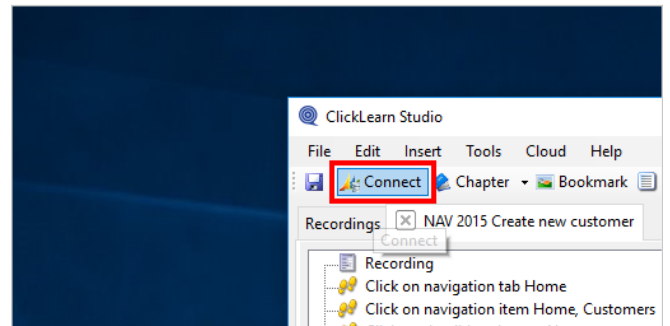


15.2.3.1. Connect to NAV Database

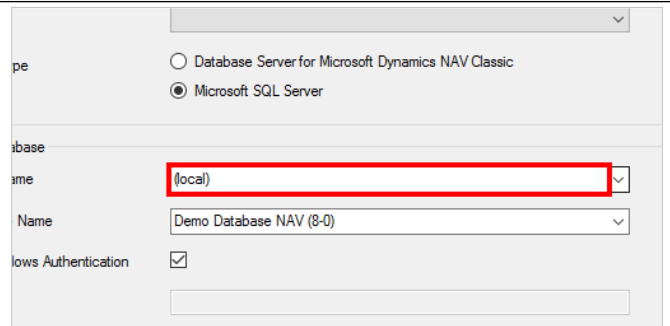
Make sure to make the right connection to your database.

If the connection cannot be made, or the database does not contain the objects required by your recording, the code generated will be lacking code lines.

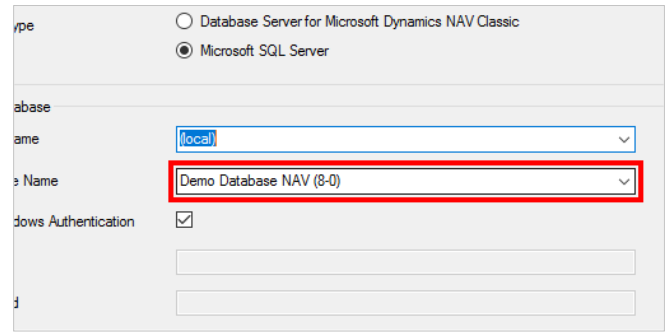
Click on the button **Connect**.



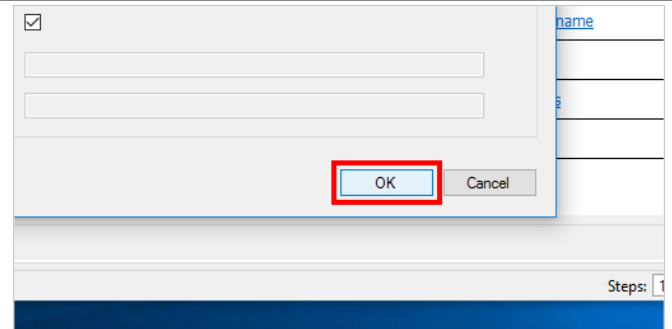
Click on the input field **Server**.



Click on the combo box **Database name**.

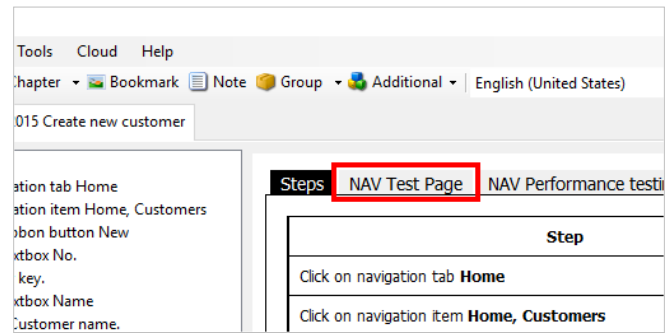


Click on the button **OK**.
You may also press **Alt+O**.

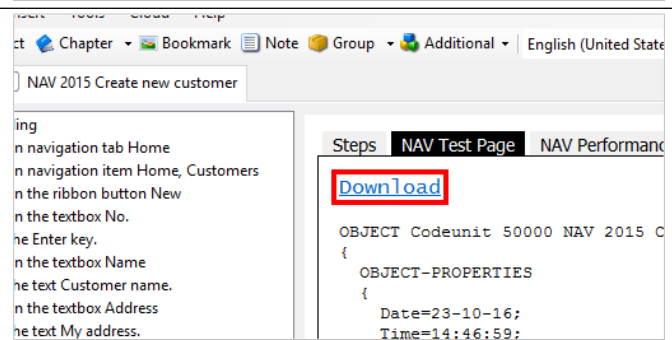


15.2.3.2. TestPage C/AL code

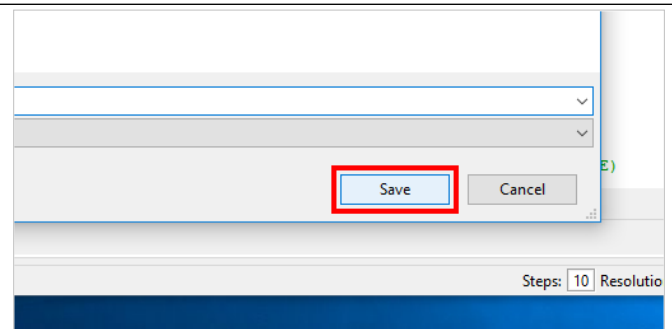
Click on **NAV Test Page**



Click on the link **Download**



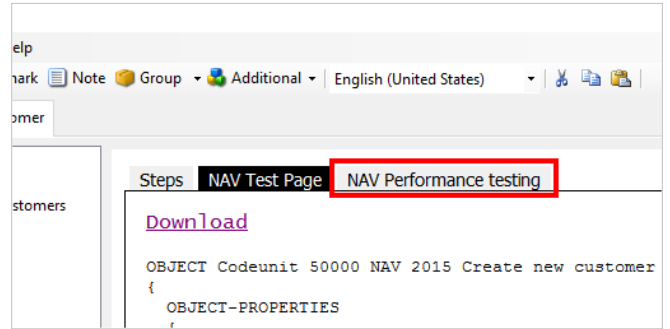
Click on the button **Save**.
You may also press **Alt+S**.



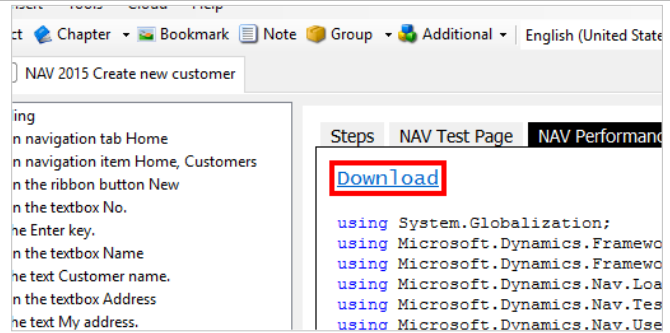
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15.2.3.3. Performance Test C# code

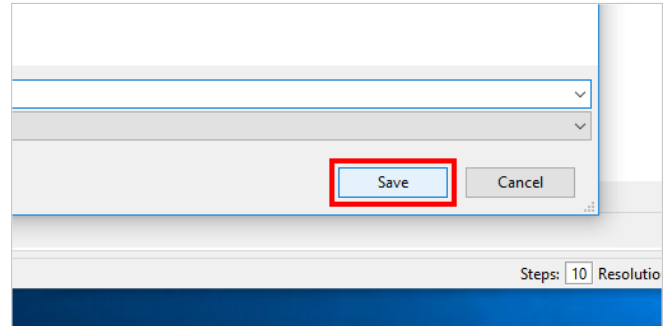
Click on **NAV Performance testing**



Click on the link **Download**



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



15.3. Microsoft Dynamics NAV Classic

15.3.1. Prerequisites

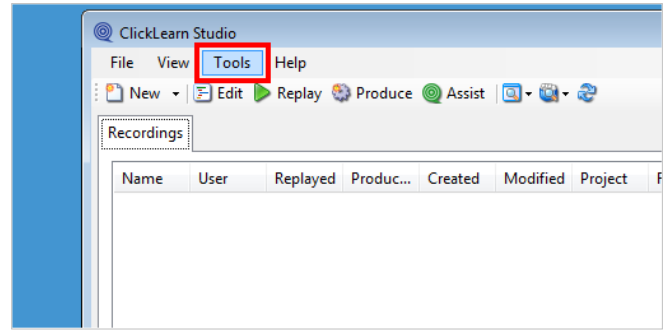
In order for ClickLearn to connect to the NAV system, the Development Kit, which includes C/Front must be installed.

It is important that the version of the Development Kit matches the installed NAV Classic client, otherwise you may experience application crashes.

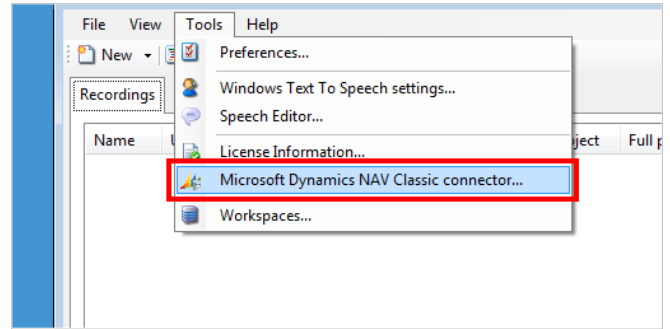
15.3.2. Connect to a new NAV Classic installation

ClickLearn may connect with multiple NAV systems. You have to define a new connection for each database or language you have.

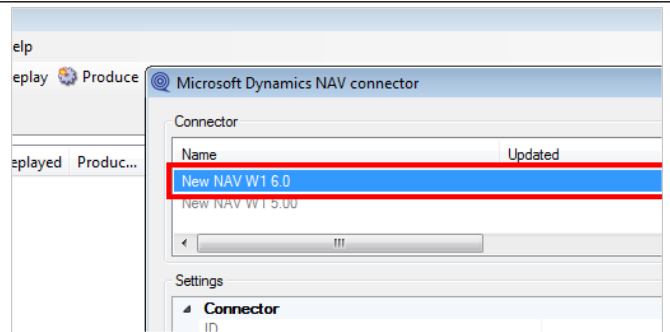
Click on the menu **Tools**.



Click on the menu **Microsoft Dynamics NAV Classic connector....**

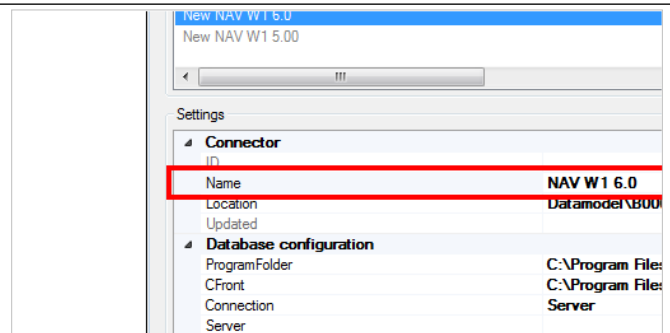


Click on the Connector, where the name starts with the text **New**, and displays the version of the NAV system you want to connect to.

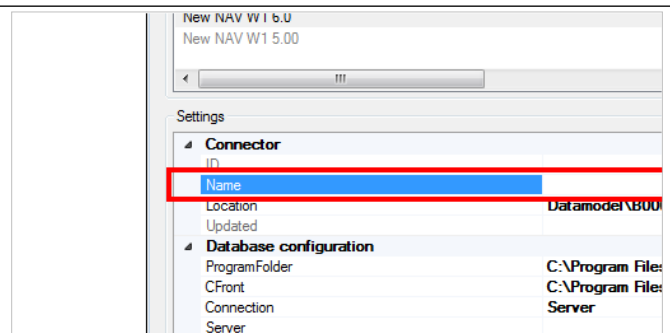


The list of connectors depends on how many NAV versions that are installed on the PC.

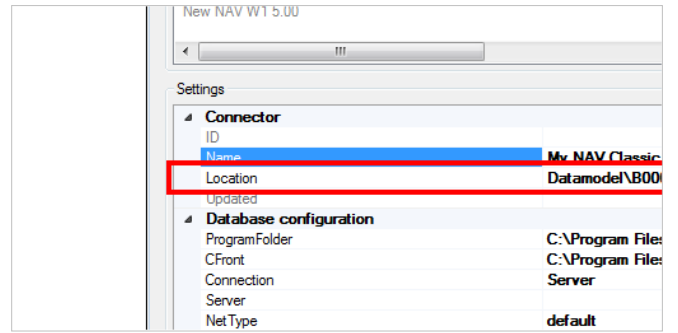
Double click on the row **Name**.



Enter **Name**.

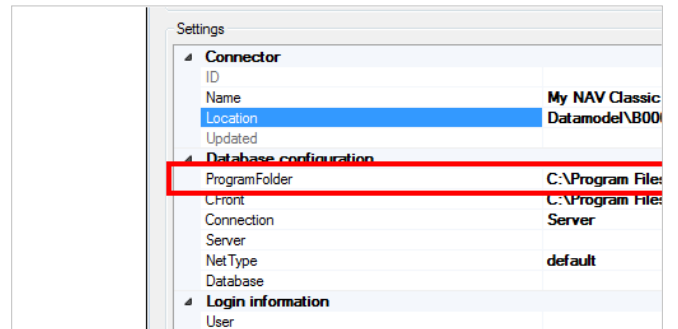


Click on the row **Location**.



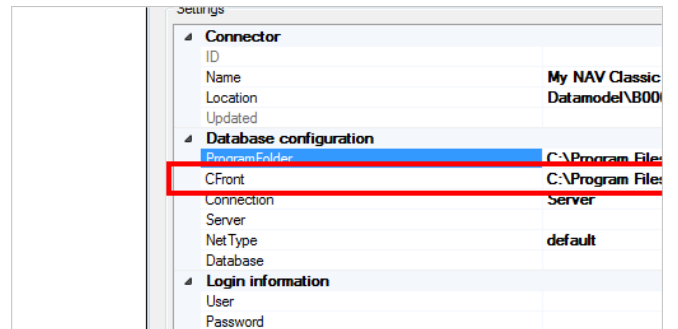
The location is where ClickLearn will save a copy of the Object Designer information, required to recognize the NAV Classic user interface. The location is relative to the ClickLearn local storage, which is normally C:\ProgramData\ClickLearn.

Click on the row **ProgramFolder**.



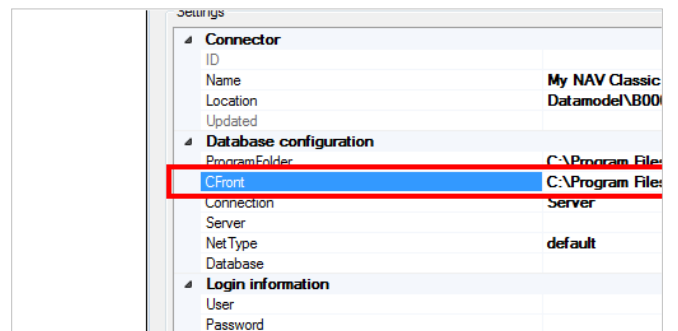
The program folder is the folder where the NAV Classic client is installed. ClickLearn automatically retrieves this information from the Windows registry.

Click on the row **CFront**.

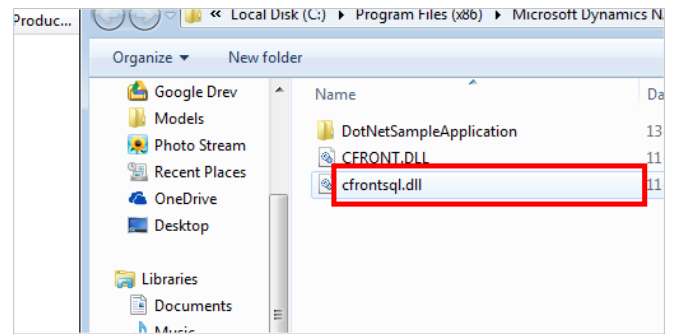


The C/Front library is a Dynamics Link Library, which is named according to which database the NAV system is using. If it is a native database, it should point to the library named Cfront.dll. If it is a SQL Server database, it should point to the library named CFrontSQL.dll.

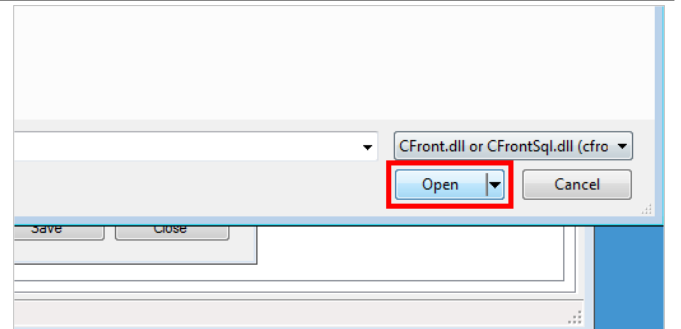
Click on the button to change the C/Front library.



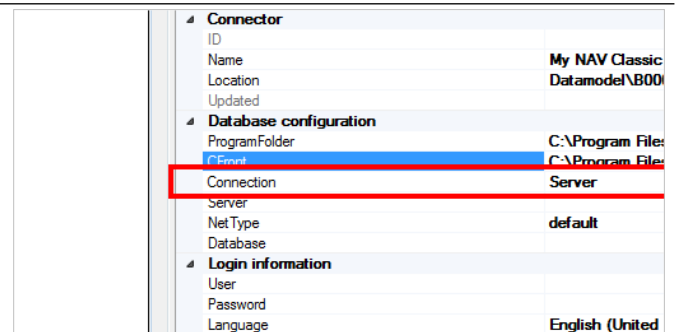
Click on the input field **Name**.



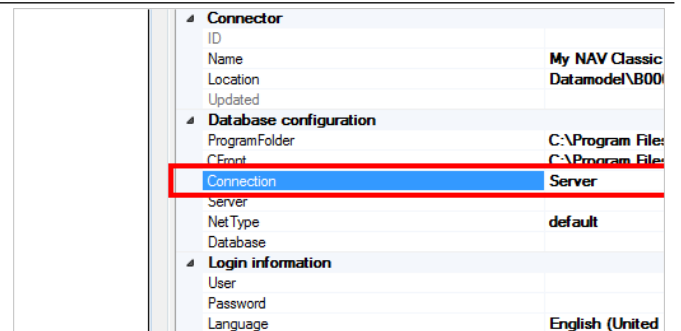
Click on the split button **Open**.



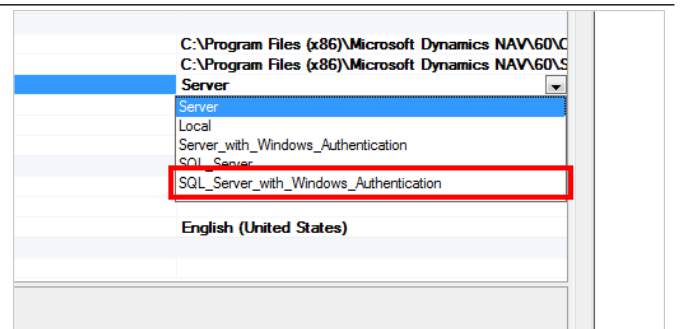
Click on the row **Connection**.



Click on the drop down button to change the connection type.



Click on the list element **SQL_Server_with_Windows_Authentication**.



Double click on the row **Server**.

ID	
Name	My NAV Classic
Location	Datamodel\B00
Updated	
Database configuration	
ProgramFolder	C:\Program File
CFront	C:\Program File
Connection	SQL_Server_wit
Server	
NetType	default
Database	
Login information	
User	
Password	
Language	English (United
Optionally	

Enter **Server**.

ID	
Name	My NAV Classic
Location	Datamodel\B00
Updated	
Database configuration	
ProgramFolder	C:\Program File
CFront	C:\Program File
Connection	SQL_Server_wit
Server	()
NetType	default
Database	
Login information	
User	
Password	
Language	English (United
Optionally	

Click on the row **NetType**.

Name	My NAV Classic
Location	Datamodel\B00
Updated	
Database configuration	
ProgramFolder	C:\Program File
CFront	C:\Program File
Connection	SQL_Server_wit
Server	(local)
NetType	default
Database	
Login information	
User	
Password	
Language	English (United
Optionally	
ModificationFile	

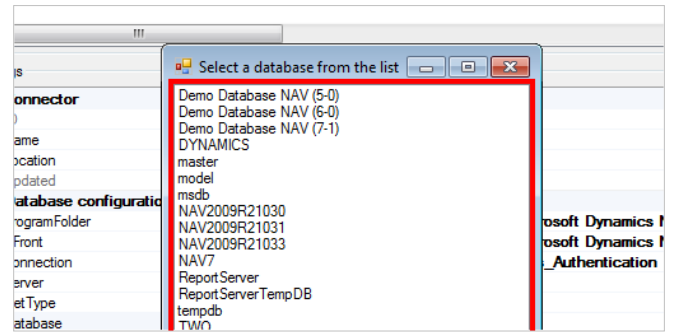
Click on the row **Database**.

Location	Datamodel\B00
Updated	
Database configuration	
ProgramFolder	C:\Program File
CFront	C:\Program File
Connection	SQL_Server_wit
Server	(local)
NetType	default
Database	
Login information	
User	
Password	
Language	English (United
Optionally	
ModificationFile	

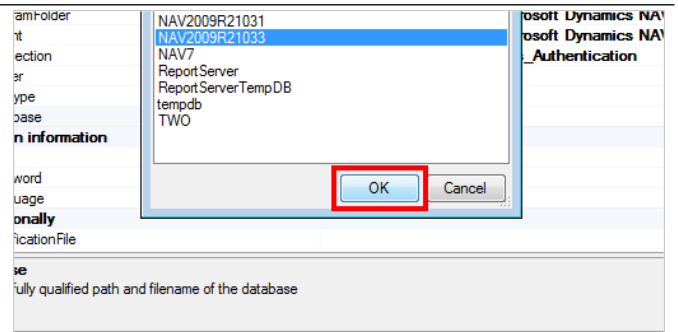
Click on the button to open a list of databases.

Location	Datamodel\B00
Updated	
Database configuration	
ProgramFolder	C:\Program File
CFront	C:\Program File
Connection	SQL_Server_wit
Server	(local)
NetType	default
Database	
Login information	
User	
Password	
Language	English (United
Optionally	
ModificationFile	

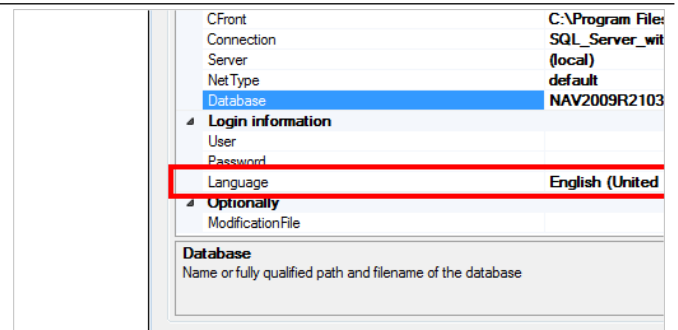
Click on a list element.



Click on the button **OK**.

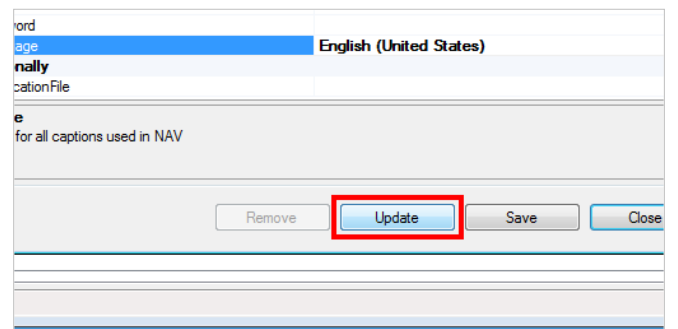


Click on the row **Language**.

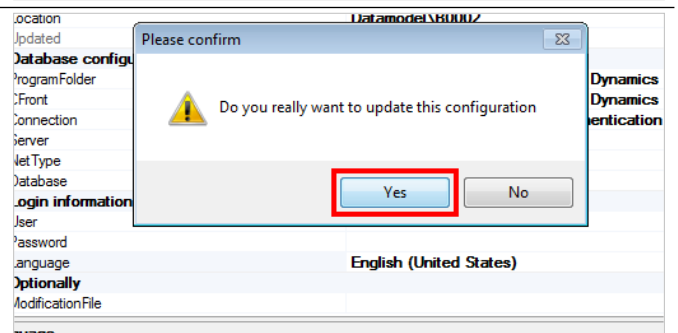


It is important to remember, that the language selected here is the only language, ClickLearn will operate on. If you need to operate on multiple languages, you need to setup another NAV connector afterwards.

Click on the button **Update**.



Click on the button **Yes**.

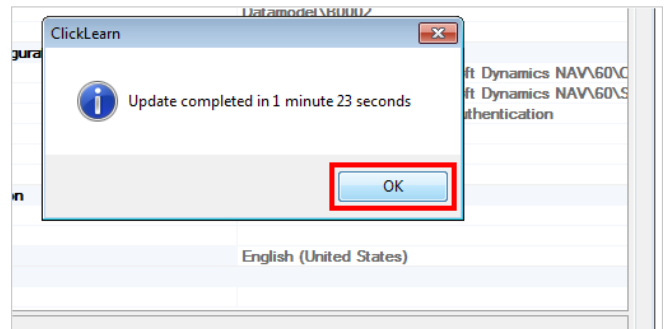


If all information is correct, ClickLearn is now able to connect to the NAV system and retrieve the required information about the user interface. If not, please correct the properties, and click Update again. If unable to

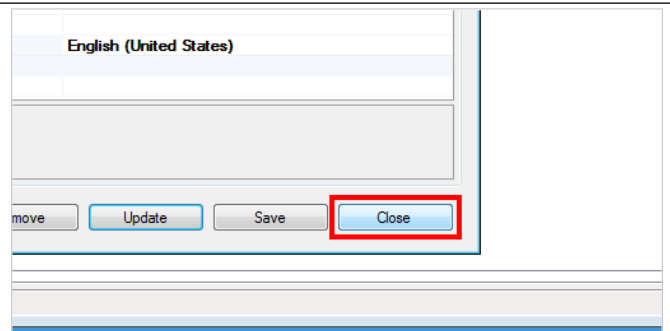
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connect, you may click save and close, so that you are able to retry later.

Click on the button **OK**.

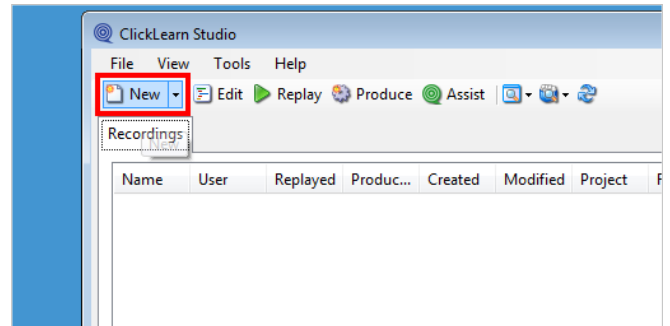


Click on the button **Close**.

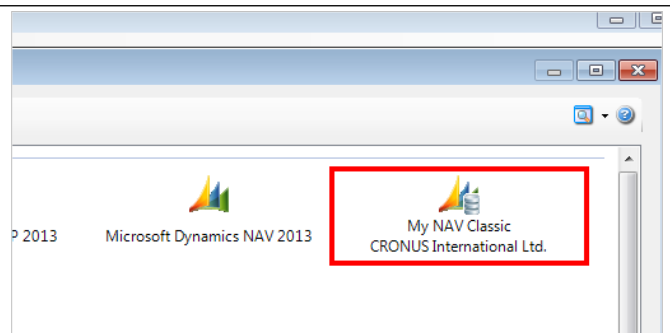


15.3.3. How to record with the NAV Classic connector

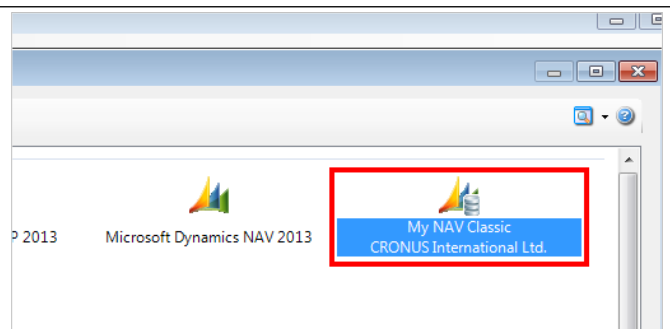
Click on the button **New**.



Click on the list element **My NAV Classic, CRONUS International Ltd.**.

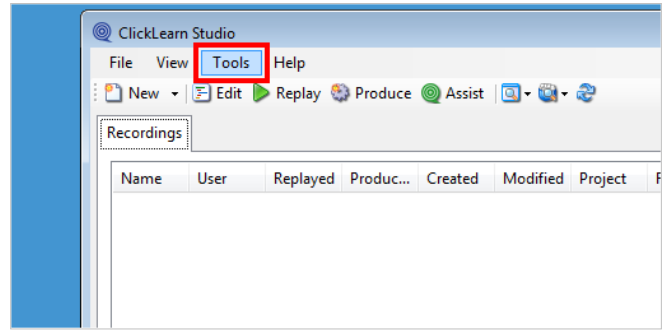


Press the **Esc** key.

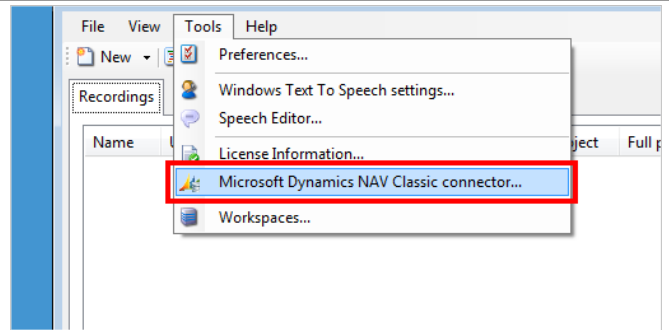


15.3.4. Change or update a NAV connector

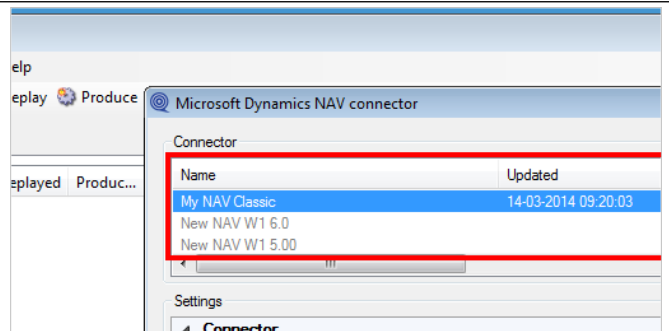
Click on the menu **Tools**.



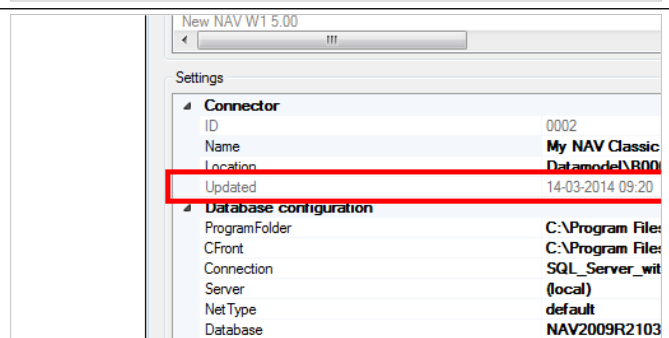
Click on the menu **Microsoft Dynamics NAV Classic connector....**



Select a name from the list that does not start with the text new.

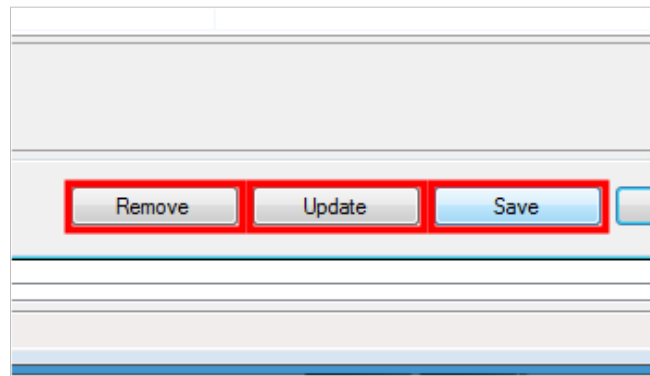


Click on the row **Updated**.



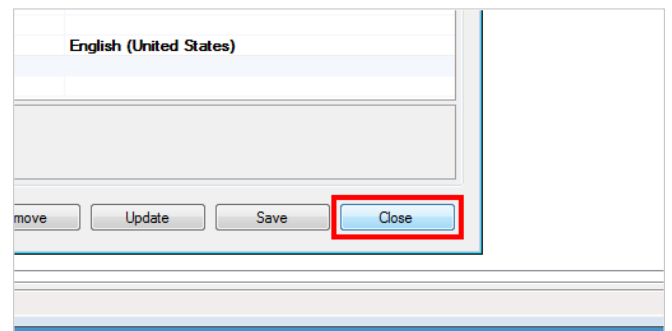
This property displays the date and time of the last update. If new fields have been added to a form, new forms have been defined, or any other user interface change, it is important to update the connector. Otherwise, ClickLearn will not recognize the change.

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- Removing a connector should only be done, if you really do not need to connect to it again.
- Updating a connector ensures that ClickLearn knows the items on the screen, within the NAV system.
- Saving changes, only means changes to the connector setup. It will not update. It can be useful, if for example, your server or database name has changed.

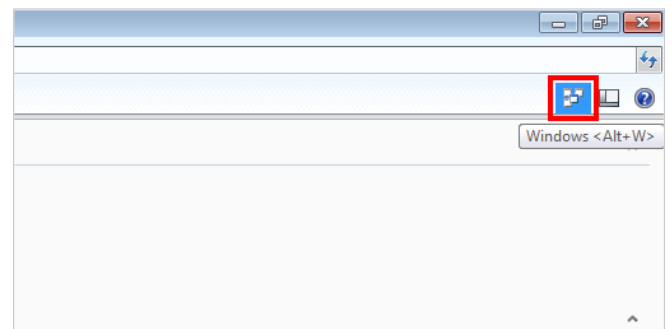
Click on the button **Close**.



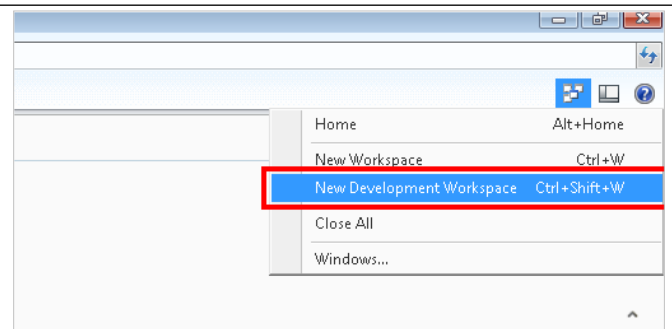
15.4.Export datamodel from Dynamics AX

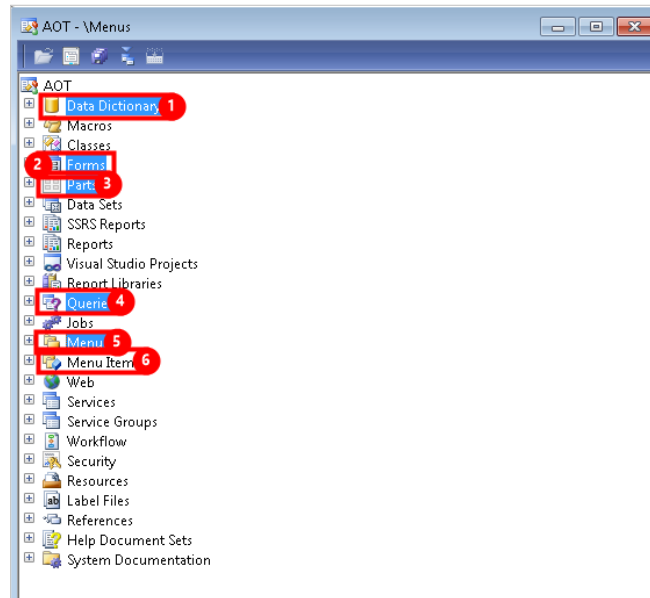
15.4.1. Export Application Object Tree Items

Click on the ribbon tab **Windows**



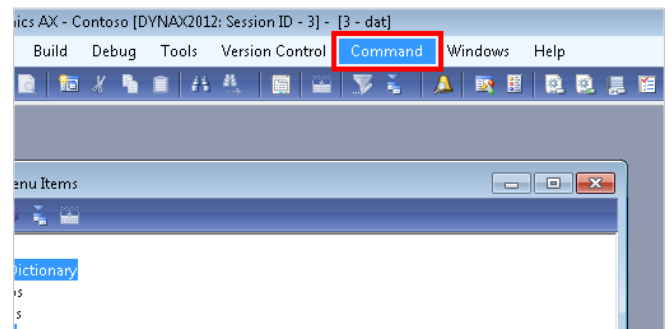
Click on the menu item **New Development Workspace**



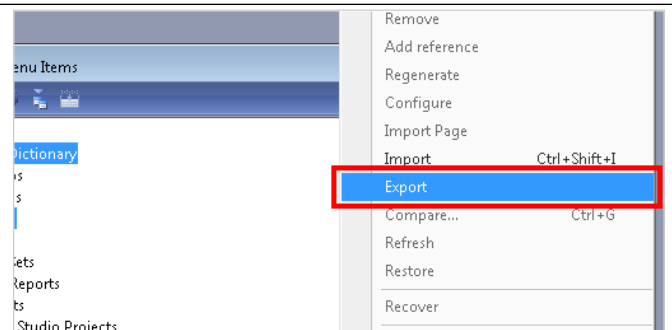


1. Click on the tree item **Data Dictionary**
2. Press and hold the **Ctrl** key down. Click on the tree item **Forms**
3. Press and hold the **Ctrl** key down. Click on the tree item **Parts**
4. Press and hold the **Ctrl** key down. Click on the tree item **Queries**
5. Press and hold the **Ctrl** key down. Click on the tree item **Menus**
6. Press and hold the **Ctrl** key down. Click on the tree item **Menu Items**

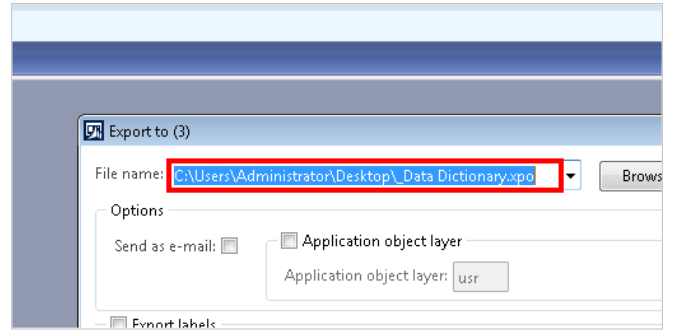
Click on the ribbon tab **Command**



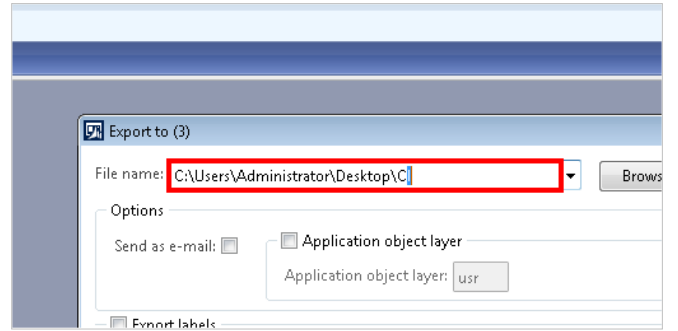
Click on the menu item **Export**



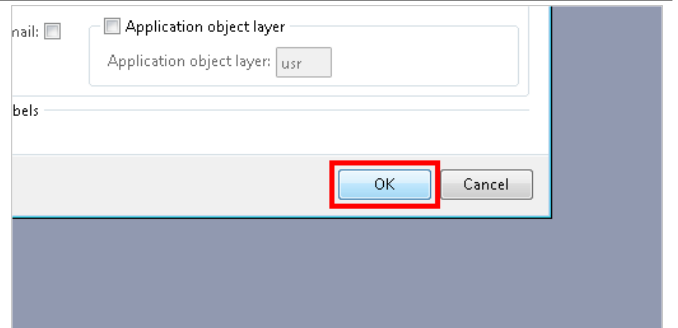
Click on the combo box **File name**



Enter ClickLearn.xpo



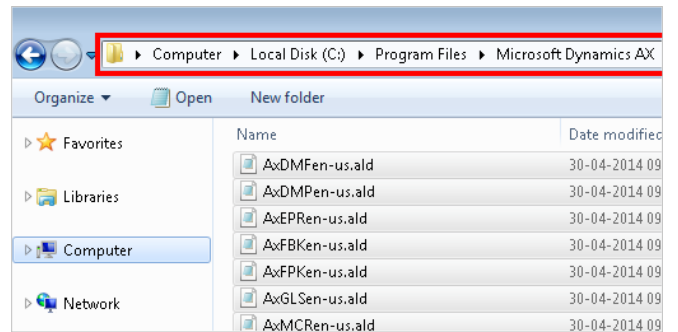
Click on the button **OK**



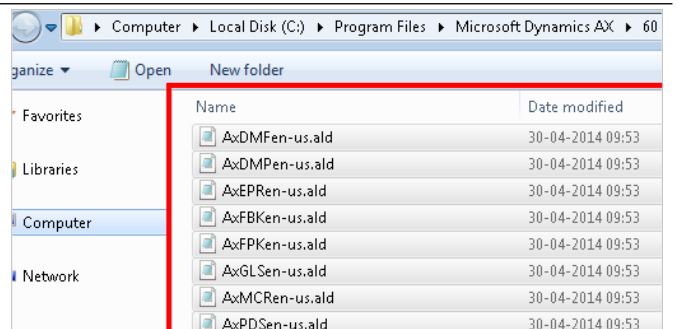
Wait for the export to finish.

15.4.2. Copy all label files

The Axapta label files is found on the server. They are typically in **Address: C:\Program Files\Microsoft Dynamics AX\60\Server\MicrosoftDynamicsAXr3\bin\Application\Standard**.



You need to copy all files with the extension the ALD, for all languages you need ClickLearn to operate on.



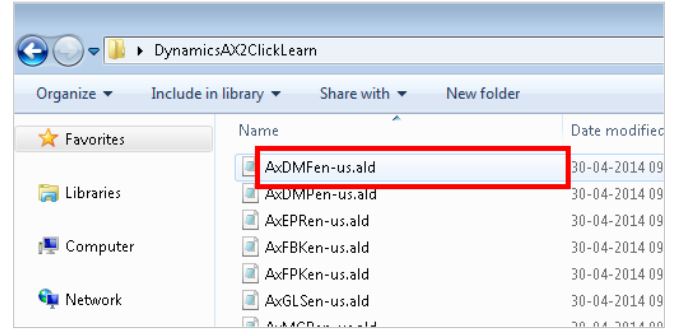
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15.4.3. Create ZIP file for ClickLearn

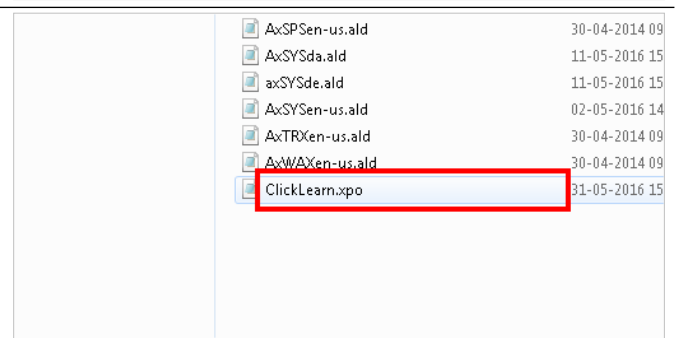
You need to copy the exported XPO file and the copied ALD files to one folder.

Then select all the files in the folder to send it to a ZIP file.

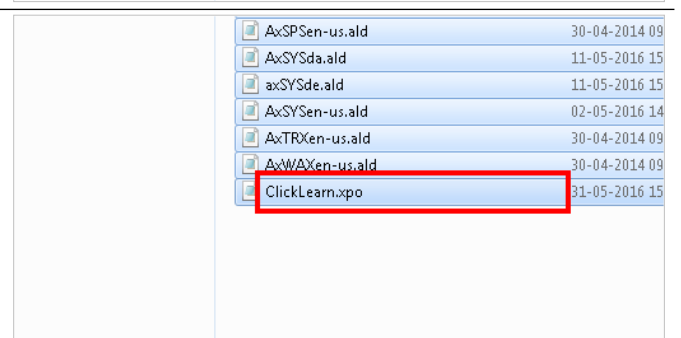
Click on the first file in the folder



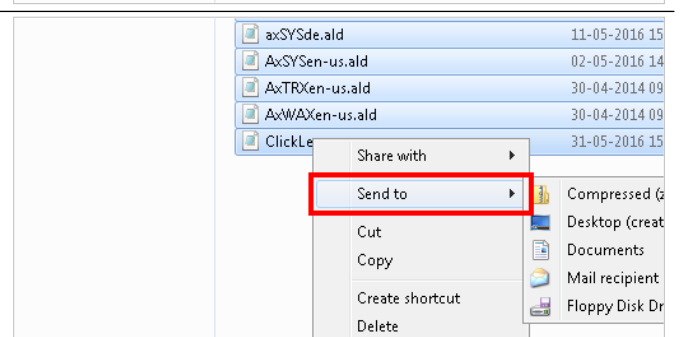
Press and hold the shift key and click on the last file in the folder.



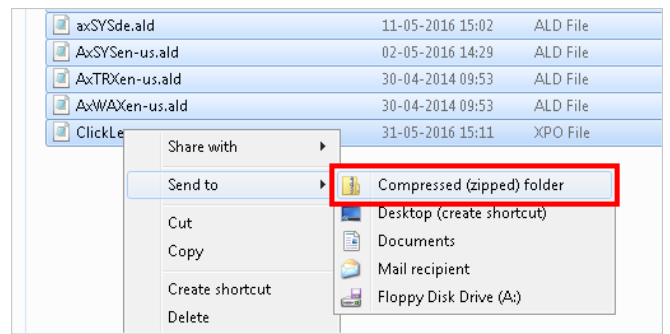
Right click on the last file in the folder.



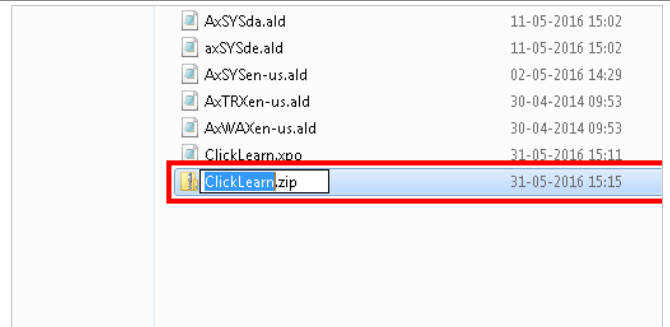
Click on the menu **Send to**.



Click on the menu **Compressed (zipped) folder**.



Click on the list element **ClickLearn.zip**.

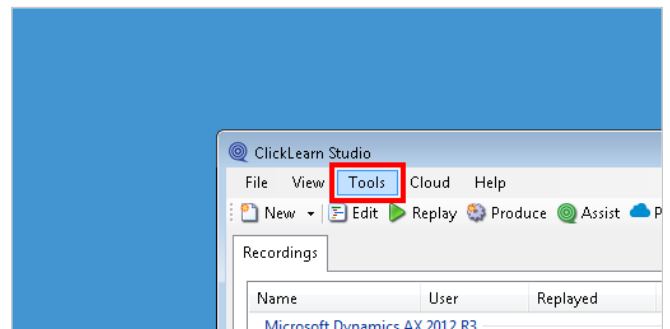


You may rename the ZIP file.

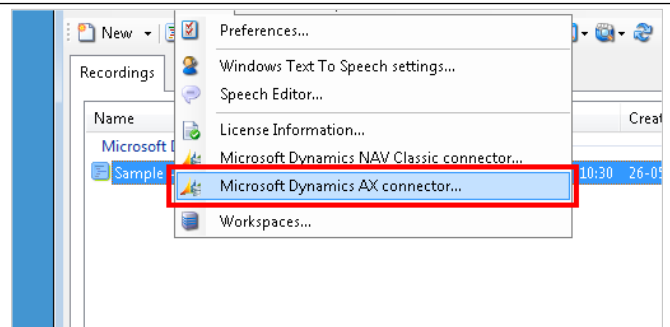
15.5. Setup of the Dynamics AX connector

When you have completed the export of the Dynamics AX datamodel you need to setup the ClickLearn connector.

Click on the menu **Tools**.

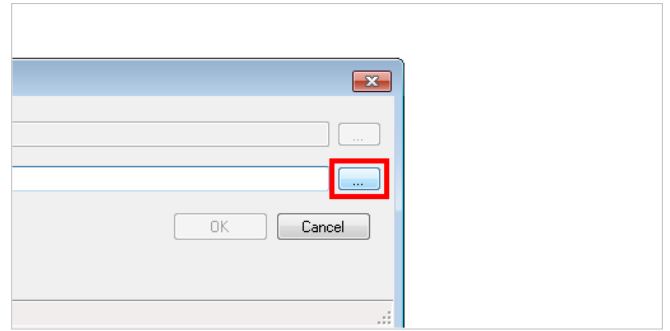


Click on the menu **Microsoft Dynamics AX connector....**

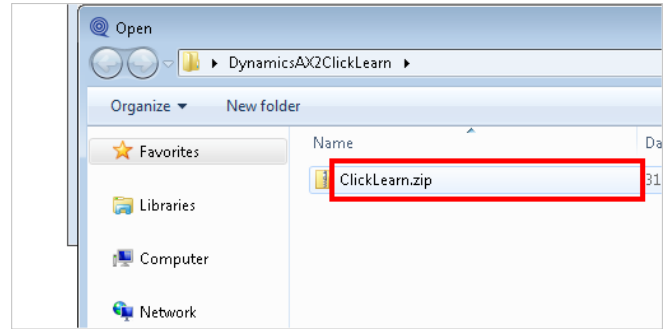


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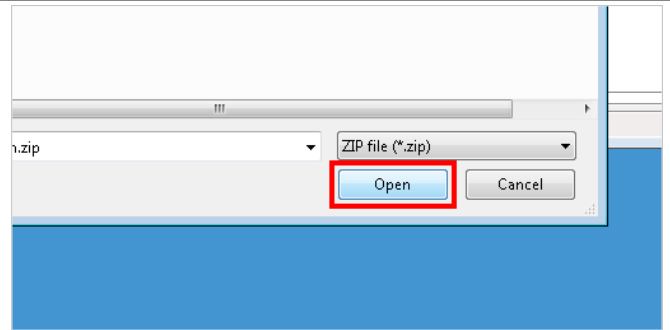
Click on the button



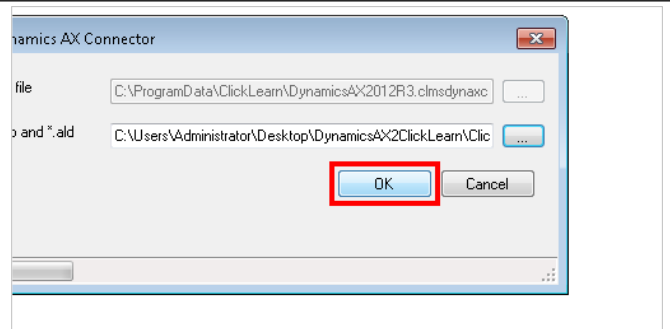
Select the zip file created when performing process to export from Dynamics AX.



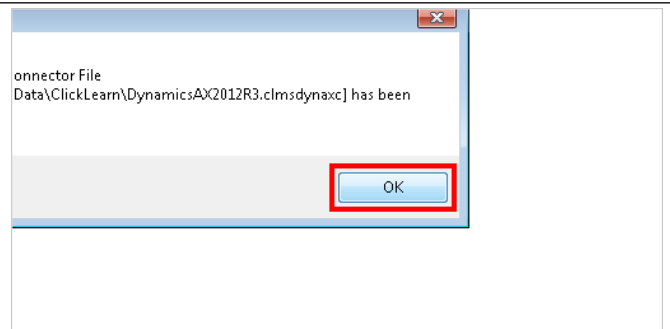
Click on the button **Open**.
You may also press **Alt+O**.



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



Click on the button **OK**.



You are now ready to use ClickLearn for your Dynamics AX 2012 client.

16. JAVA specific

16.1.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.

16.1.1. Installing JAVA Access Bridge

Oracle describes the installation here: <http://docs.oracle.com/javase/accessbridge/2.0.2/setup.htm>

16.1.1.1. 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:

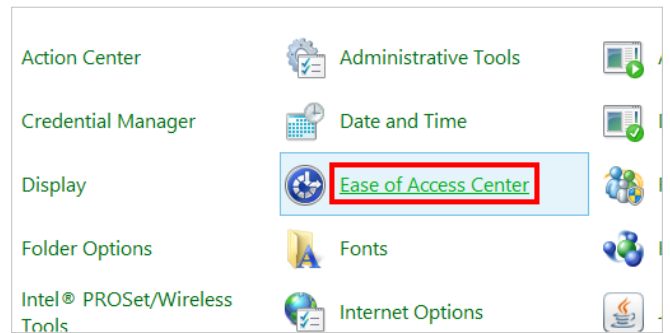
WindowsAccessBridge.dll WindowsAccessBridge-32.dll

16.1.2. Test JAVA Access Bridge

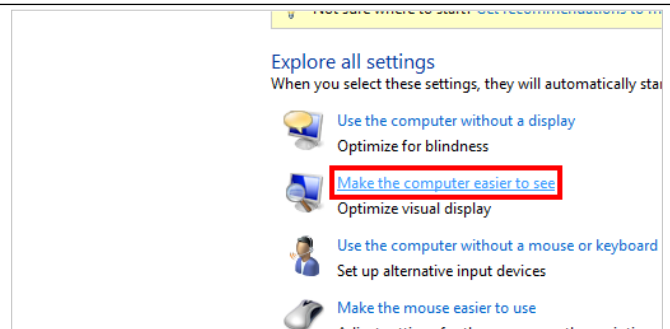
To test that all is installed properly, please start your JAVA based application. Then start the JavaMonkey-32.exe, and select the menu File-Refresh. The tree structure in this window should contain multiple screen elements, otherwise the installation is not in order.

16.2.JAVA requirements in Control Panel

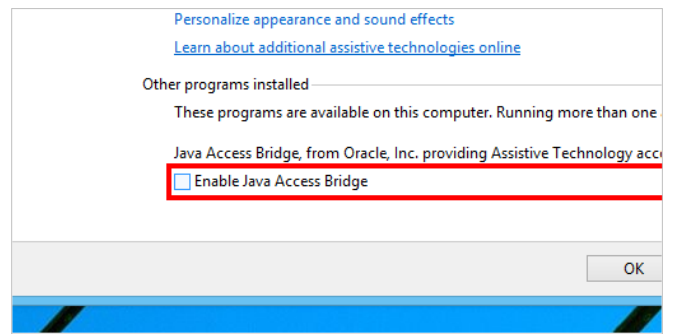
Click on the link **Ease of Access Center**.



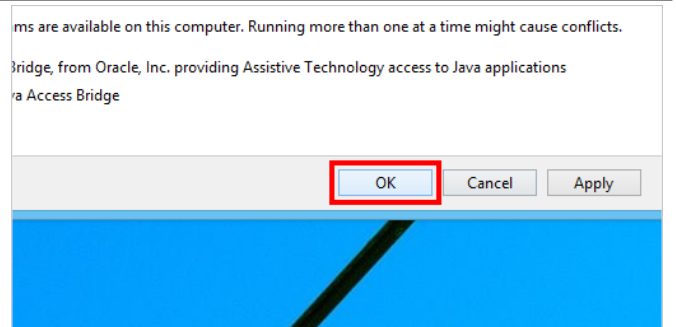
Click on the link **Make the computer easier to see**.



Click on the checkbox **Enable Java Access Bridge**.



Click on the button **OK**.
You may also press **ALT+O**.



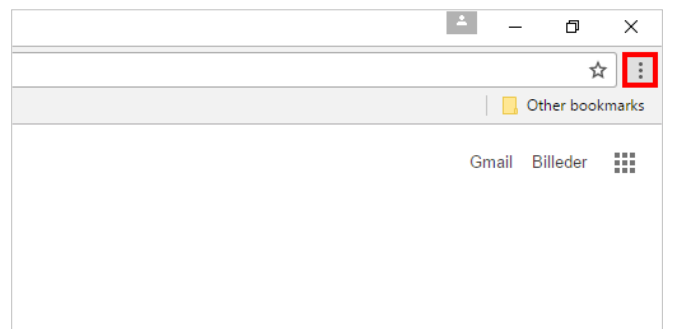
17. Web Browser support

17.1. Google Chrome connector

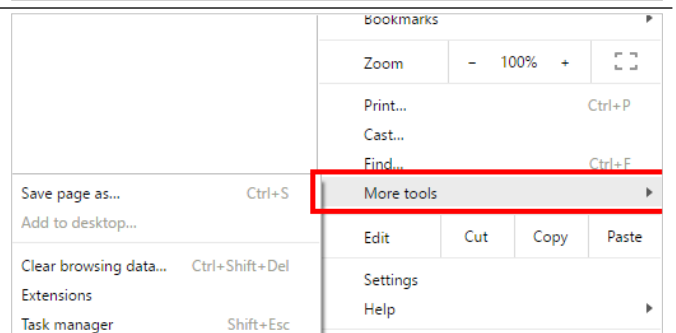
17.1.1. Install extension

In order to use ClickLearn to record from the Google Chrome browser you need to install an extension.

Click on the button **Customize and control Google Chrome**.

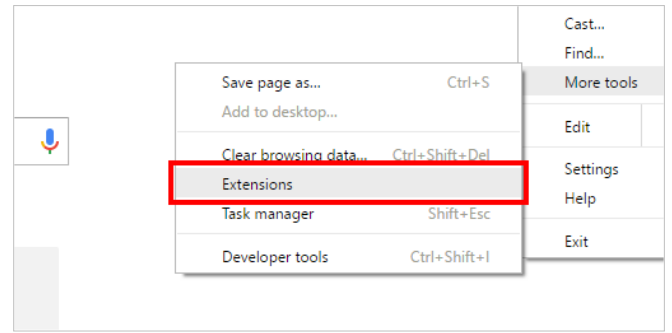


Click on the menu **More tools**.

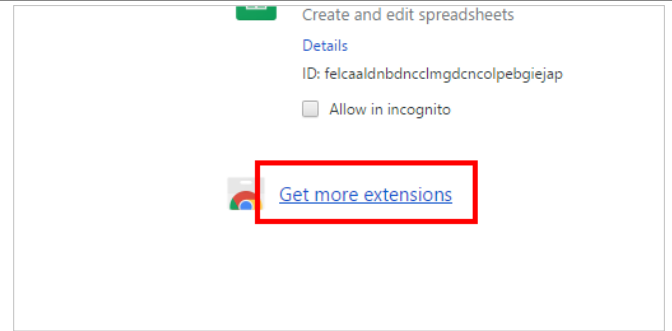


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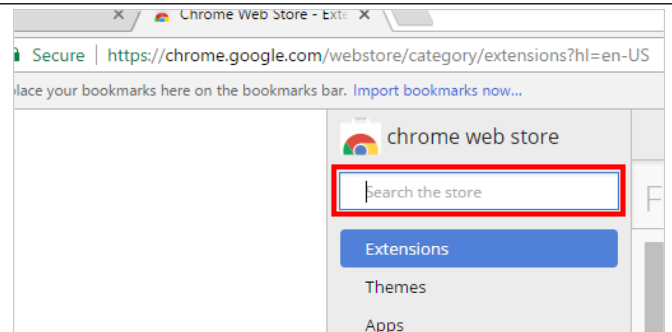
Click on the menu **Extensions**.



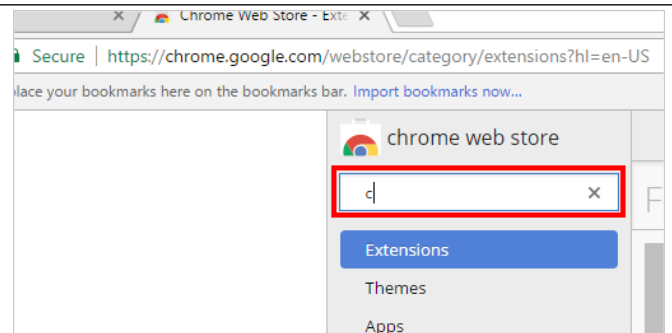
Click on **Get more extensions**.



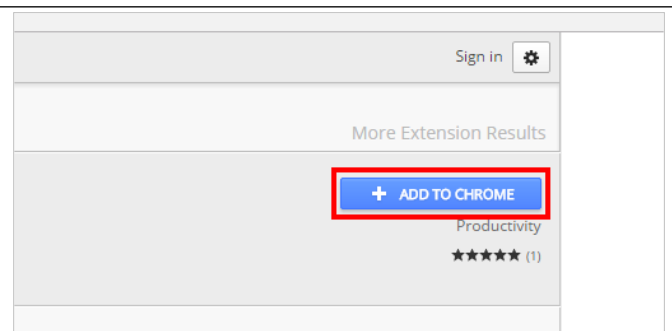
Click in the **Search box**.



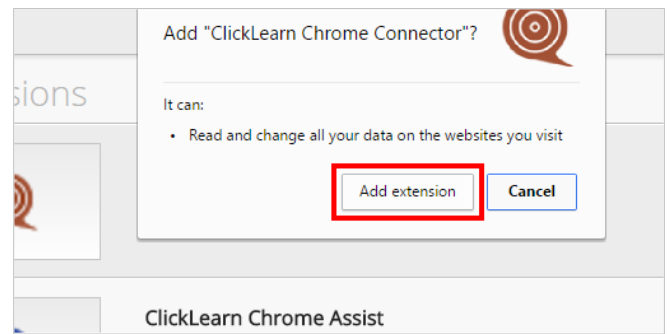
Enter the text **clicklearn**. Press the **Enter** key.



Click on the button **ADD TO CHROME**.



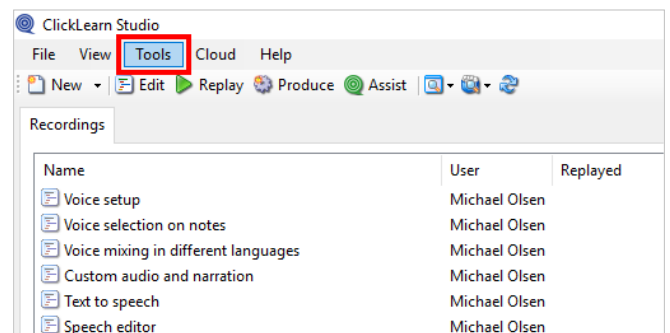
Click on the button **Add extension**.



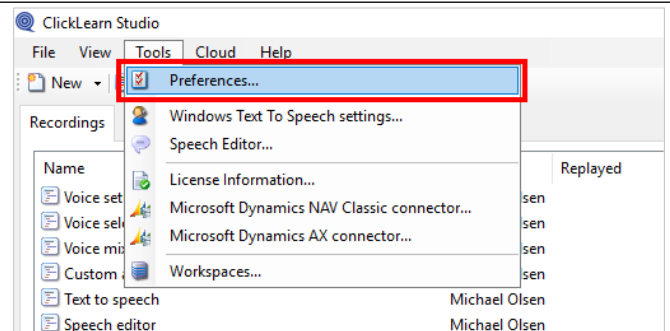
17.1.2. Communication with ClickLearn Studio

17.1.2.1. Install native messaging host

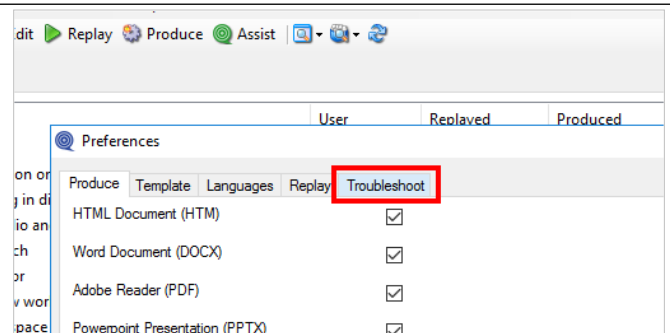
Click on the menu **Tools**.



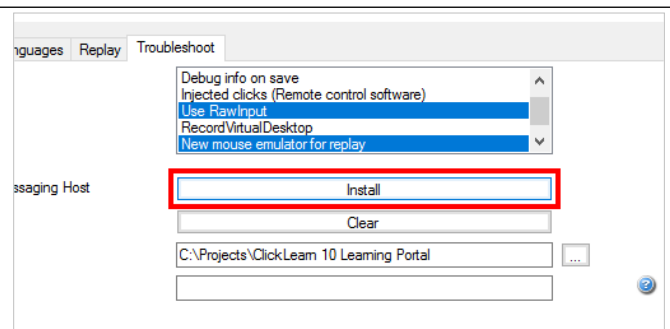
Click on the menu **Preferences...**



Click on the tab **Troubleshoot**.

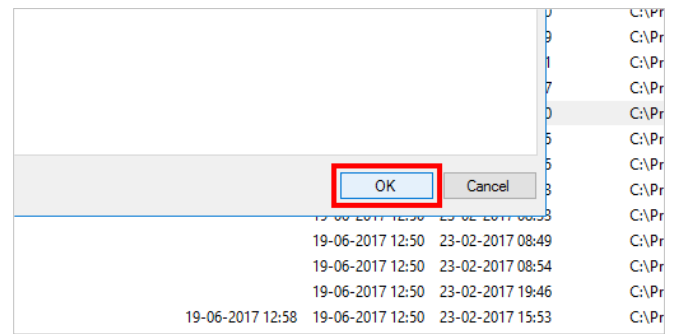


Click on the button **Install**.



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



17.2. Microsoft Edge connector

We currently do not support the Microsoft Edge connector when recording, replaying or using the assist.

Please use the Internet Explorer or Google Chrome browser instead.

17.3. Internet Explorer connector

The Internet Explorer connector does not require any extension. It is build in to the ClickLearn Studio solution.

18. SAP Specific

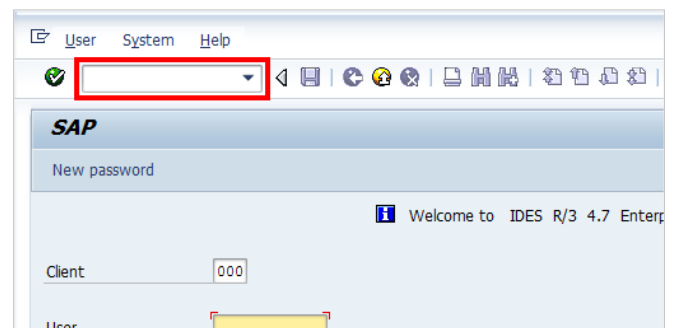
18.1. SAP Logon requirements

ClickLearn has been tested successfully with SAP Logon for Windows, Version 7.10, Compilation 2, Patch Level 7.

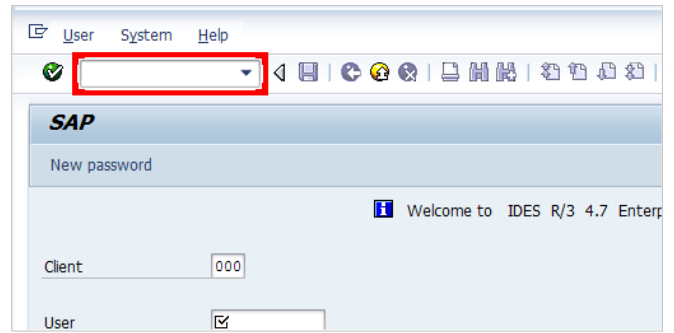
ClickLearn also supports the NetWeaver Business Client. To get more technical information regarding the NWBC support for SAP GUI Scripting, please refer to: <https://blogs.sap.com/2014/03/19/frequently-asked-questions-sap-netweaver-business-client/>

The blog states that the NWBC client combined with the SAP GUI Scripting only supports one session, meaning that you cannot record using multiple tabs connected to the same or different systems.

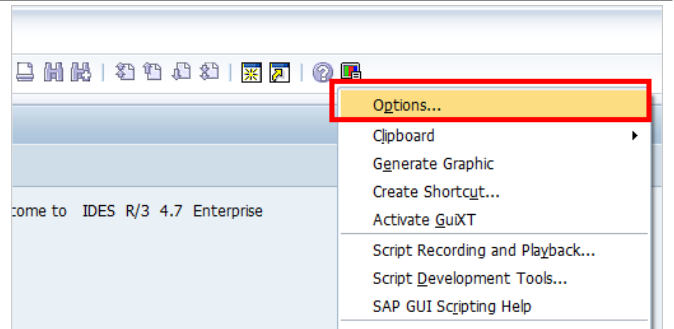
Click on the transaction code field



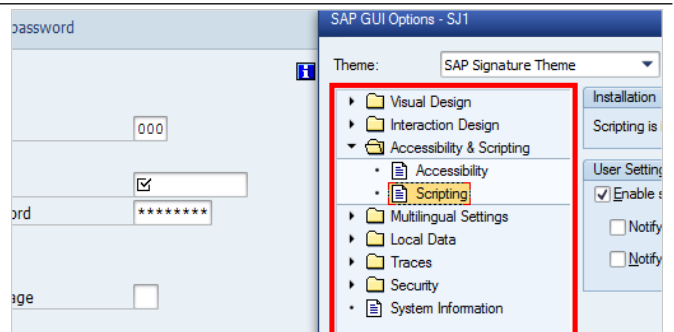
Press **ALT+F12**.



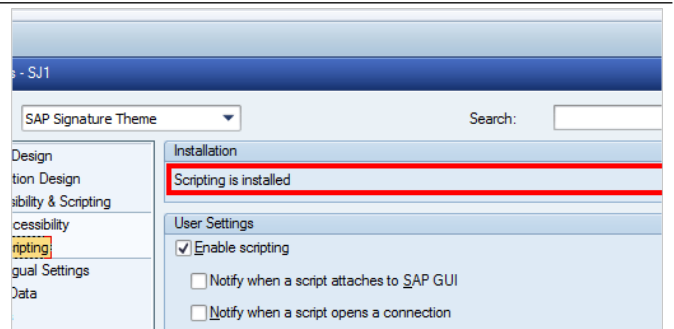
Select the menu **Options...**



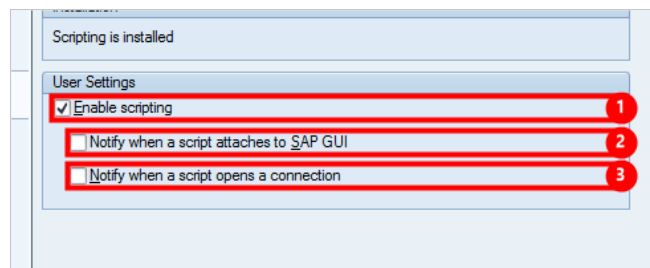
Click on **Accessibility & Scripting, Scripting**.



Click on **Scripting is installed**.



The installation must state that scripting is installed. If scripting is not installed or enabled, please refer to SAP OSS Note 480149.

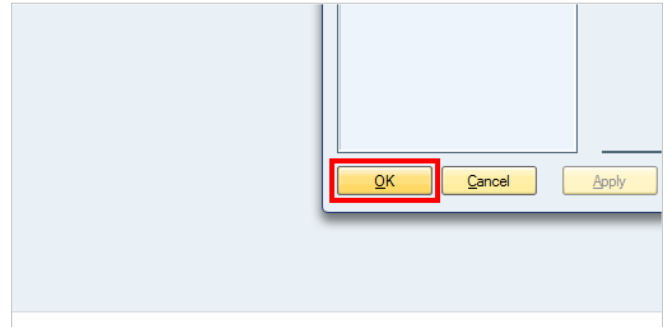


1. Must be checkmarked.
2. We recommend that this is unchecked. If not SAP will ask for permission every time you record, replay

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- or Assist with ClickLearn.
- We recommend that this is unchecked.

Click on the button **OK**.



18.2.SAP settings required

18.2.1. Requirements

This document describes the requirements necessary for ClickLearn to record and replay on a SAP system.

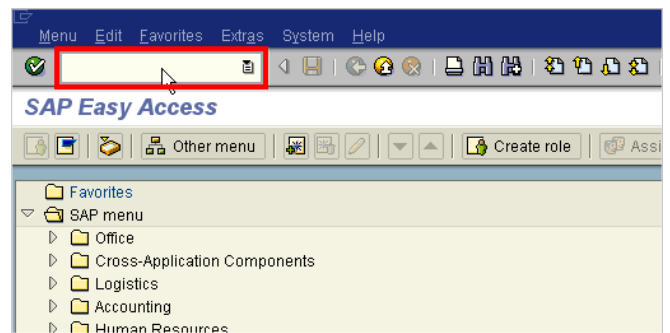


18.2.1.1. Scripting notification

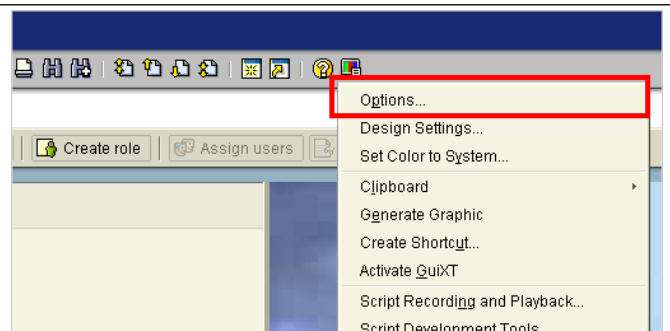
If this requirement is NOT met, SAP will ask for permission every time you start recording or replay with ClickLearn.



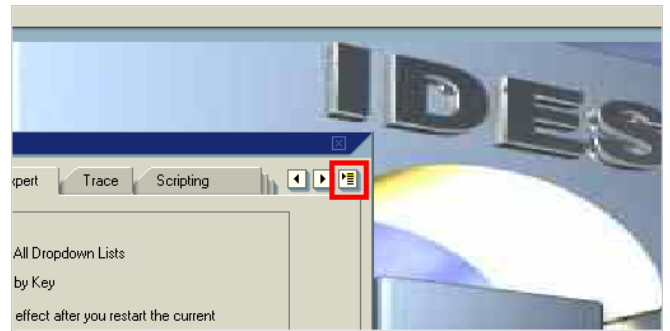
Press **ALT+F12**.



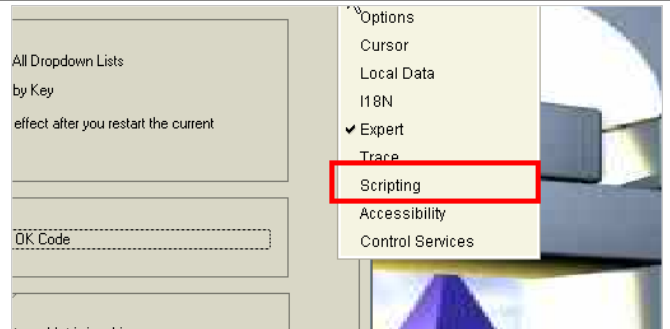
Select the menu **Options...**



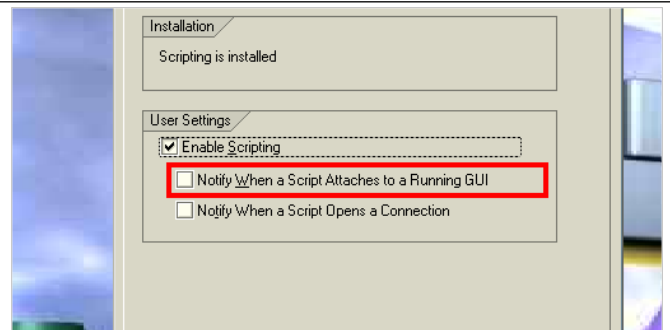
Select the tab menu button



Select the menu **Scripting**



Make sure this checkmark is NOT set.

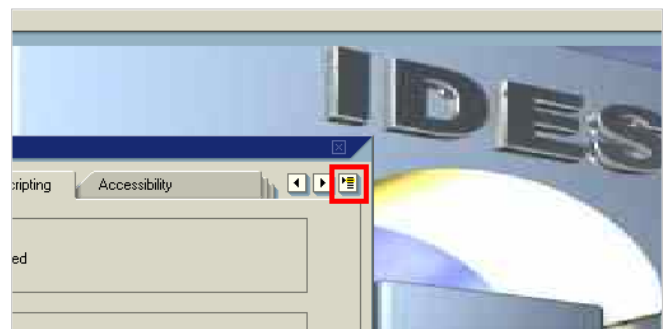


18.2.1.2. Combo boxes

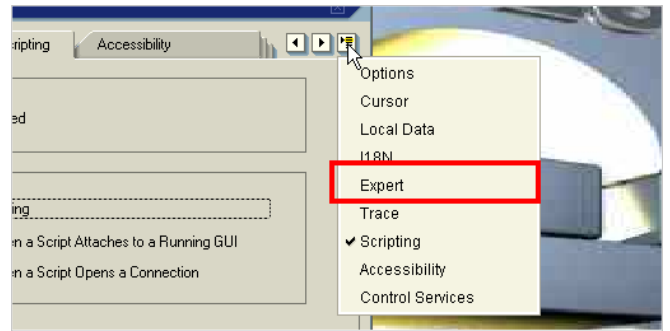
If this requirement is NOT met ClickLearn may not replay the selection of combo box values correctly



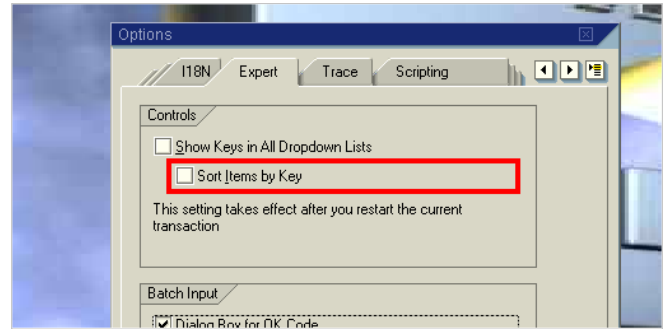
Select the tab menu button



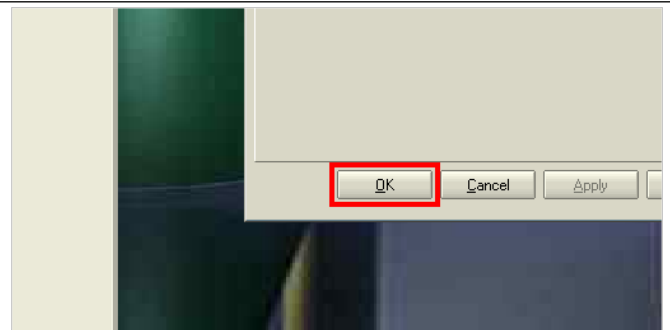
Select the menu **Expert**



Make sure this checkmark is NOT set.



Click on the button **OK**.

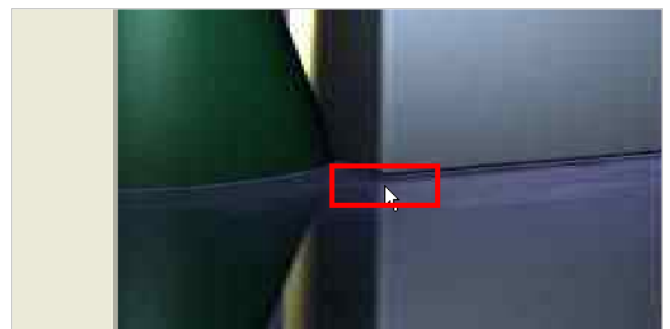


18.2.1.3. Lookup dialogs

If this requirement is NOT met, you may experience DUMPS within the SAP system when recording click on a lookup.

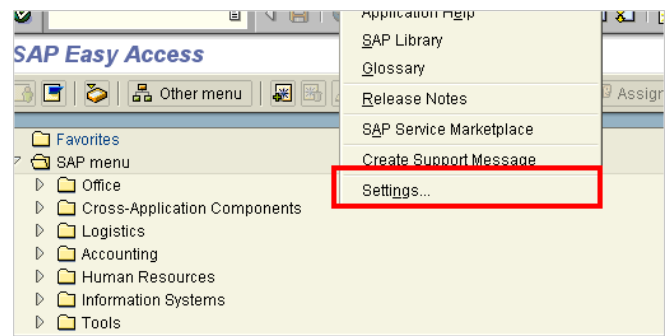


Press **ALT+h**.

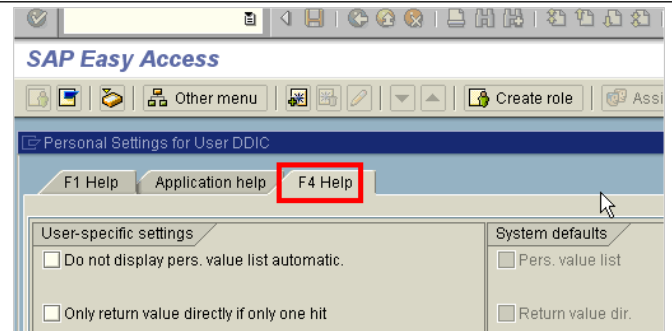


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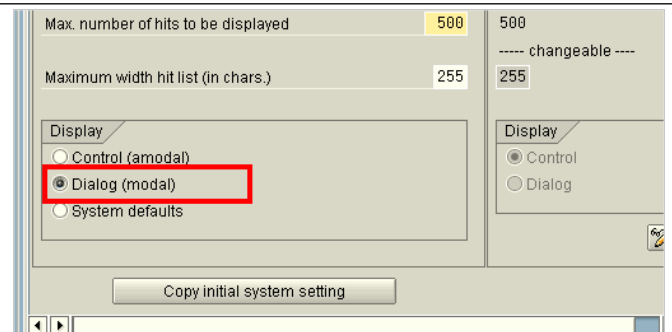
Select the menu **Settings...**



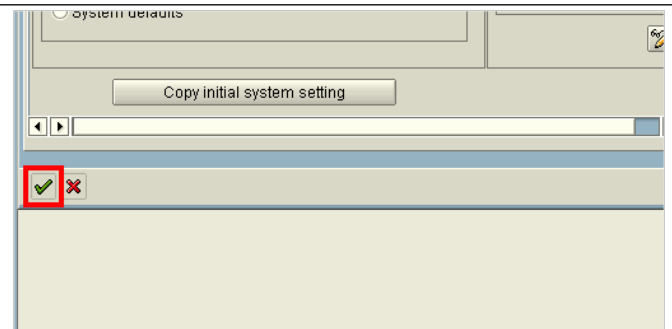
Select the tab named **F4 Help**



Make sure this option is set.



Click the button **Copy** on the toolbar



19. Windows Server OS specific

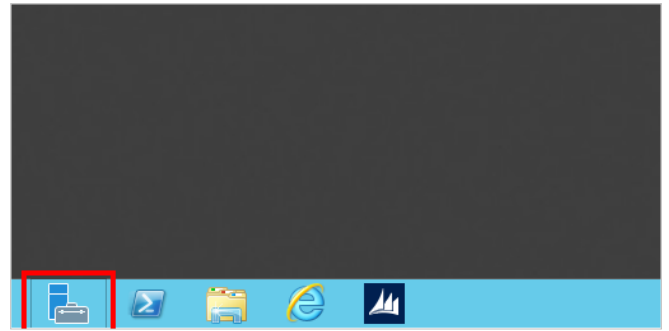
19.1. Windows Server 2012 missing WMVCore.dll

ClickLearn is a client application, but may run on a Windows Server.

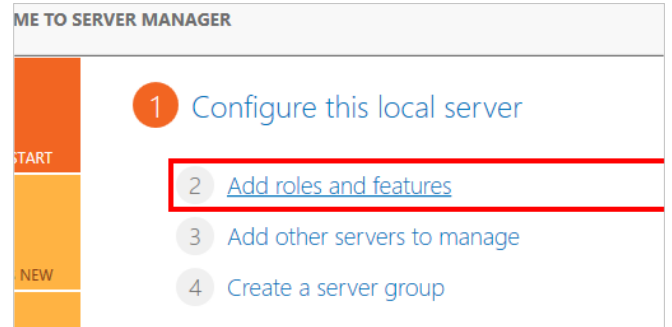
If you experience an error by start of ClickLearn, that states that WMVCore.dll is missing, you need to add a feature in the Server Manager.

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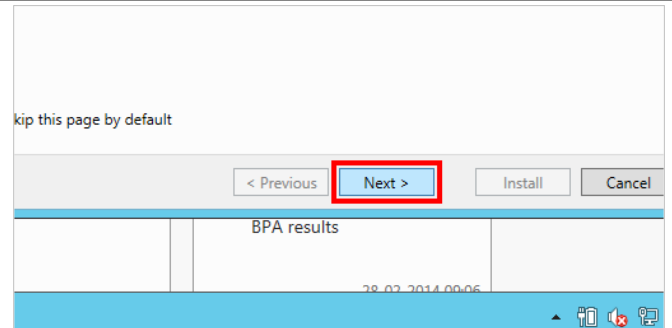
Click on the button **Server Manager**.



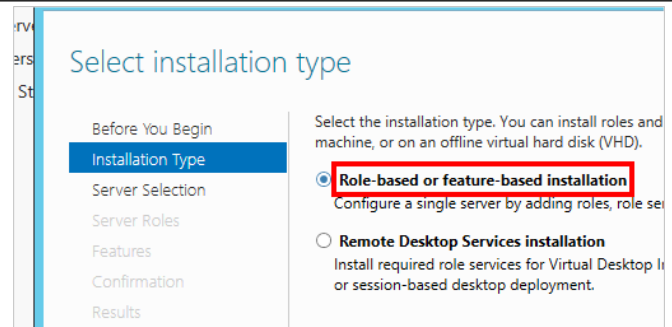
Click on the button **Add roles and features**.



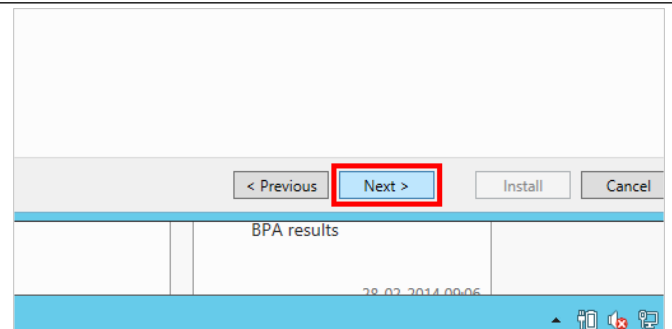
Click on the button **Next >**.



Click on **Role-based or feature-based installation**.

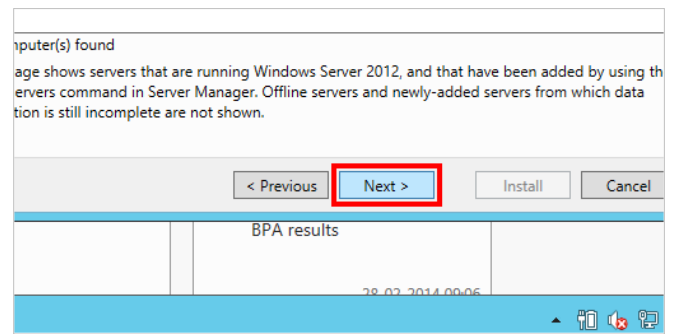


Click on the button **Next >**.

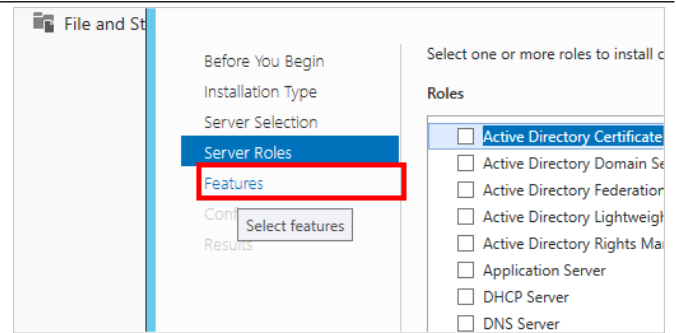


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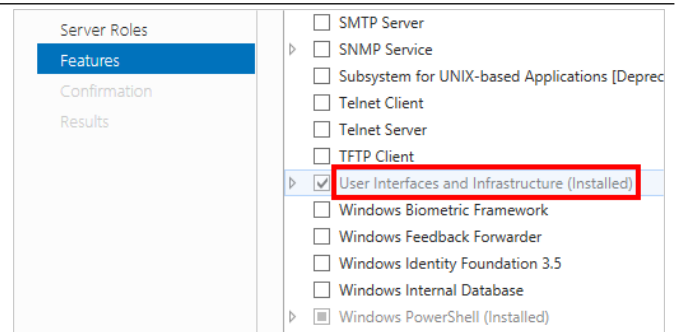
Click on the button **Next >**.



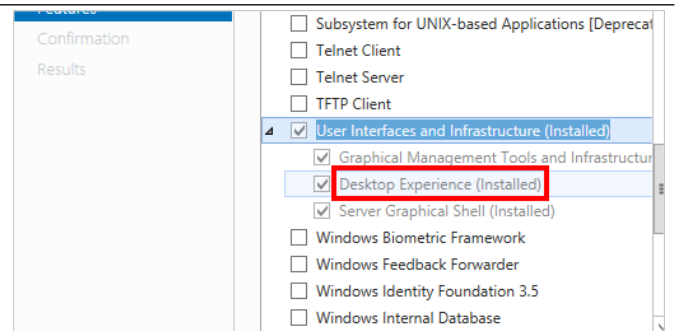
Click on **Features**.



Double click on **User Interfaces and Infrastructure (Installed)**.



Click on **Desktop Experience (Installed)**.



This feature must be checked to avoid the missing WMVCore.dll.

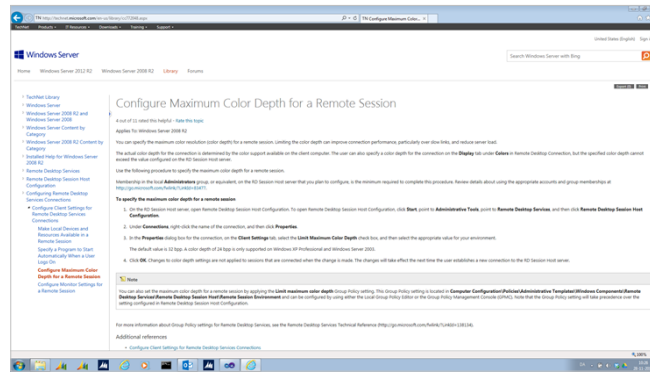
Finish the guide and reboot the server.

19.2.Remote Desktop setup on server

In order for ClickLearn to work properly, when installed on a Windows server, 32-bit color is required.

This is important for your remote desktop connection, so check both client and server, to make sure you have 32-bit color.

Please refer to this Microsoft document: <http://technet.microsoft.com/en-us/library/cc772048.aspx>



Remote session color depth

20. FAQ

20.1. Questions and Answers

20.1.1. License

20.1.1.1. How is Clicklearn licensed

The license consists of a main license including one author license. It can be per seat licensed, concurrent licenses or cloud licenses.

Additional authors may be purchased.

Each main license includes a main connector. Additional connectors may be purchased.

20.1.1.2. How may the produced material be distributed

The produced material may be distributed freely within the licensed organization. Distribution outside the licensed organization requires a partner license.

The license grant is a single company and the materials created using ClickLearn may only be distributed to a single company and subsidiaries.

If you have a Service Provider Edition license, you may freely distribute the produced material to your customers.

20.1.2. System Requirements

ClickLearn consists of three distinct requirement groups when it comes to minimum configuration.

20.1.2.1. Authors

The author group consists of users that are able to record, edit and produce learning material and documentation using ClickLearn. The following minimum requirements apply to this group:

1. Windows XP operating system or newer with .NET framework 2.0 or newer.
2. Microsoft Office 2000 or newer used when producing Word, PDF and PowerPoint documents.

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3. Access to ClickLearn Cloud - <https://services.clicklearn.dk>.

We recommend a reasonably fast computer for authors, preferably a dual core processor, 60 Gb HDU and a minimum of 4 Gb. memory. The system runs equally well on 64- and 32 bit environments.

20.1.2.2. Readers

The reader group consists of users able to read and study material generated by ClickLearn. The minimum requirements are:

1. A standard browser platform. For example Explorer, Chrome, Firefox and Safari.

Microsoft Word and Microsoft PowerPoint documents require Office 2000 or newer versions of the respective programs or a viewer capable of correctly formatting these documents.

20.1.2.3. Assist users

The assist group consists of all users that use the Assist-technology within ClickLearn. The Assist technology guides the user through a complete recording within their production environment.

The minimum requirements are:

1. Windows XP operating system or newer with .NET framework 2.0 or newer.

20.1.3. Troubleshoot

20.1.3.1. My recording is missing clicks

If the recording is missing clicks, it is normally because you did not wait for the green rectangle to appear before doing the click. Please slow down while recording and wait for the green rectangle to appear.

Another reason could be an application that steals the clicks from ClickLearn. Please verify that the setting "Use RawInput" is selected in the menu Tools, Preferences on the tab Troubleshoot. Take caution that multiple settings may be selected or deselected using the Ctrl key when clicking.

20.1.3.2. No green rectangle appears for an element on screen

This may be due how the application has been designed or which ClickLearn connector is locating the user interface element.

Please send a technical support to ClickLearn so that our support team may review the screen image and explain why no green rectangle appears.

20.1.3.3. Excel cells is not detected - only a large green rectangle

This is because your license does not include the Excel connector. Please purchase the Excel connector.

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20.1.3.4. Replay fails immediately

The replay fails when it cannot locate a user element on screen. Typically, this is because you have forgotten to prepare your application before starting the replay. For example, if the first step in your recording will make a click on the menu File in Notepad, please make sure Notepad is started and active, and then switch to ClickLearn and start the replay.

20.1.3.5. ClickOnce installation problems

If the ClickOnce installation fails, please try and view the details and search on google for "ClickOnce error message" where the error message should be replaced with the error message found in details.

The error message "The application binding data format is invalid" may be resolved by removing the files from %userprofile%\AppData\Local\Apps\2.0.

20.1.3.6. Problem with screen images

If working with multiple monitors or using text scaling, please make sure to only use the primary monitor and have scaling set to 100%.

Be aware, that AntiVirus applications like Webroot Secure Anywhere, may block ClickLearn from capturing the screen images, resulting in all black screen images.

20.1.3.7. How to change the folder where preference settings are stored

You may set the environment variable named cl_programdatapath to any path you want on the server. For example cl_programdatapath=C:\Users\xxx\ClickLearn will make sure to store the ClickLearnCustomConfig.xml in the folder C:\Users\xxx\ClickLearn.

20.1.4. Voice

20.1.4.1. Which voices are included with ClickLearn

Voices has to be purchased separately, and can normally be found on the internet. ClickLearn also offers a ClickLearn Cloud subscription, with access to many high quality voices.

20.1.4.2. Which standard should a voice comply to

Voices must be compliant with Microsoft Text To Speech (SAPI) and installed on the PC where you produce the material.

20.1.4.3. Is videos with embedded voicing licensed

Please be aware of the voices license terms. Some voice providers does NOT allow you to generate video files with the voice audio embedded.

20.1.4.4. Why don't I get any audio

If you are running on a Windows Server it may be required to have the service Window Audio Service running. Also, the server feature Media Foundation must be installed.

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20.1.5. Video

20.1.5.1. Can my video be displayed on an iPad

ClickLearn produces a video format named HTML Video. This format may be displayed on any tablet running Windows OS, Android or iOS. It does not require any installed video decoder.

20.1.6. Releases

20.1.6.1. How often will there be new releases

ClickLearn will normally have two major releases per year. Apart from these, development may require additional and more frequent releases, due to new customer requests and service packs.

20.1.6.2. How will the releases be published

If you are using the <https://apps.clicklearn.com/>, everything is done automatically and you will receive new releases instantly.

If you are using the on premise installation of ClickLearn, you need to download the newest .msi file from <https://apps.clicklearn.com/ClickLearnStudioSetup.msi>. If you have difficulty downloading an .msi file directly, you may also download the <https://apps.clicklearn.com/ClickLearnStudioSetup.zip> and unpack this file manually.

20.1.7. Editor

20.1.7.1. How do I crop a screen image

Cropping is done automatically by ClickLearn according to the template settings. Normally you should not need to do the cropping yourself.

20.1.7.2. How do I make text bold or italic

Using ClickLearn, you do not have the option to make text bold, italic or set colors. This is to prevent getting inconsistent document looks in the final material when multiple users are on the project of making documentation.

20.1.8. Producer

20.1.8.1. Why does it take so long to produce my recording

ClickLearn produces multiple documents every time you produce a recording. The video formats are the main reason that it takes some time. You may choose not to produce one or more of the video formats, by unchecking them in the menu Tools, Preferences. Please note, that it is always possible to check them again, if you need the video formats to be produced.

21. Releases

21.1. Release 11

21.1.1. Release 11.0.0.65, 2019-08-20

ClickLearn Studio will now run as 64-bit instead of 32-bit which solves out of memory problems.

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All ClickLearn applications are relocated from apps.clicklearn.dk to apps.clicklearn.com.

21.1.2. Release 11.0.0.64, 2019-08-20

Due to change from 32-bit to 64-bit, ClickLearn Studio first needs to be uninstalled and then reinstalled. We will automatically start the flow for you when the application starts and you accept by clicking OK to the message.

21.1.3. Release 11.0.0.63, 2019-08-02

Templated step numbering will now also include steps using instruction text.

Solved issue with note inserted between step and keyboard action that caused incorrect keyboard instruction.

IFS Apps 10 connector will now capture dropdown items correctly when cell is a combobox.

Missing steps in the produced web assist collection on a Shelf has been solved.

Beta release of connectors for Excel and Outlook 365.

Problem publishing produced content stored on an UNC path has been solved.

Missing template entry text for LSRetail on NAV 2018 and Business Central has been added.

You may now use the Microsoft Edge Dev to record and replay. Install the ClickLearn extension within Edge from the Google Chrome store.

21.1.4. Release 11.0.0.62, 2019-07-02

Improved capture of field labels in PowerApps model driven applications.

Problem producing Word and PDF in help projects has been solved.

Improved initial directory selection for the save and save as dialog according to recording list preference setting.

Problem with produced subchapter numbering has been solved.

21.1.5. Release 11.0.0.61, 2019-06-21

Connector for Business Central has been extended to automatically handle More Options and Less Options during replay. Re-record of click on these two buttons is required.

Improved support for Dynamics 365 UCI.

Problem with replay click on field label instead of actual input part of new April Spring release of Business Central has been solved.

IFS Scope Tool importer extended to import scenario and activity descriptions. Additionally it is now possible to specify a directory for industry specific recordings which has precedence over the standard recording directory.

Video player optimized to skip steps more efficiently when questions in flow role is used. Re-produce is required.

Problem with produced walkthrough page on NAV help projects not showing buttons for video and assist is solved.

Beta release of new QuickBooks online connector.

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Beta release of IFS FSM6 connector.

Connection dialog in Business Central help projects has been re-designed to allow user to control tenant id and client id. This enables partners and customers to connect to multiple tenants.

Improved connection to ClickLearn services when proxy settings are required.

21.1.6. Release 11.0.0.60, 2019-04-30

Missing template entries added to the IFS Apps 10 connector.

Problem with auto translation function has been solved.

Problem with IFS Application 10 replay of user drop down button is solved. Re-record of step required.

CRM Inside Help is now able to connect to on premise installations using active directory security.

Improved Dutch translations for the video player.

Added support for new controls in IFS Apps 10 connector.

ClickLearn Cloud services for speech and translations updated due to changes in endpoints from third party providers.

Connector for Business Central has been updated to support the April 2019 release.

SCORM packages now stores and retrieves the full report for detailed evaluation displayed at the end of a video, even when course has been stopped and then resumed multiple times.

21.1.7. Release 11.0.0.59, 2019-03-22

CRM Inside Help project is now able to connect correctly to region crm8 and crm11.

Missing template entries added to the IFS Apps 10 connector.

Produced test me video now uses the correct screen sequence when recording has been replayed to avoid revealing when to click.

Context menu for excluding step on specific languages now works.

Problem in produced assist repository for Dynamics 365 for Finance and Operations has been solved.

Beta release of connector for Dynamics 365 CE UCI.

Beta release of PowerBI web connector.

Beta release of PowerApps web connector.

Beta release of the new ClickLearn Cloud Studio. This includes true cloud storage, enhanced security model, automatic check in and out, automatic versioning and cloud production and publishing.

21.1.8. Release 11.0.0.58, 2019-02-28

Problem with some chinese translations has been solved.

Missing template entries added for the IFS Apps 10 connector.

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Problem with replay of more command in the CRM connector has been solved.

Problem with click noise when using Google voices has been solved.

Problem with replay of form view drop down selection in the CRM connector has been solved.

ClickLearn Assist extended to allow user to sign in to the ClickLearn Content Cloud when published as private content.

Recording of select elements has been improved in all web connectors to include cases where the current value is the selected one.

SharePoint tracking has been improved to support the use of SP-JSV_, where JSV_ activates tracking of the video content.

The Business Central connector has been extended to correctly support the identification of action button and navigation bars.

Production of video has been improved to correctly leave out all steps that has video off or is excluded.

Use of `###PICTURETL##` as alternative text in the PowerPoint template now ensures picture stays top left.

Replay problem with navigation on Dynamics 365 Finance and Operations has been solved.

Missing template text has been added to all IFS Apps connectors.

ClickLearn Studio failed to allow creation of new Business Central Inside Help due to license issue. This has been solved.

21.1.9. Release 11.0.0.57, 2019-01-23

Replay now works when mouse buttons has been swapped.

Problem with new digital signature has been solved.

21.1.10. Release 11.0.0.56, 2019-01-21

Missing template entries added for the IFS Apps 10 connector.

Support for swapped mouse buttons when recording.

Unexpected warning not waiting for the green rectangle in NAV 2018 Windows client has been solved.

Better support added for Microsoft Dynamics CRM date time fields.

IFS Apps 10 replay of dialog buttons has been resolved.

Preferences for replay has been extended to set max number of seconds to wait for slow applications in the web browser.

New digital signature on the published version of all ClickLearn applications.

Support for language specific SCORM text when course is resumed. Located in the recording template under the ClickLearn HTML Video, JSV_SCRIPT_ML.

Solved problem with use of no voice on notes.

Solved problem with global replay data when using the "load from recording" button.

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New autotranslated language Chinese, Traditional has been added.

Problem with not starting the ClickLearn Assist when content was published to the ClickLearn Content Cloud (using SSL) has been solved. Requires a re-produce and new publish.

Correction to some swedish text entries used for the feedback section.

21.1.11. Release 11.0.0.55, 2018-12-06

Missing template entries and new control types added for the IFS Apps 10 connector.

A new release has been made due to deployment problems.

Problem with not starting the assist from embedded learning portal in IFS Applications has been solved.

Problem with produced SCORM 2004 3rd edition has been solved.

All connectors based on the Google chrome extension has been updated due to changes in the browser. Please click the ClickLearn Chrome Connector icon in the browse, click the button Clear Cache and then restart the browser.

The connector for Microsoft Dynamics 365 Finance and Operations has been extended to support changed behavior of links in fields and columns on lists.

Problem with produced book or shelf when recording title contained ping, ampersand or quote has been solved.

Big improvements has been made to support Windows 10 scaling and Google Chrome browser zoom.

Support added for multi select picklist in the Dynamics 365 CRM connector.

21.1.12. Release 11.0.0.54, 2018-11-16

Problem with SetGlobalValue has been solved.

Problem with meta data not being displayed after a replay has been solved.

IFS FSM connector extended to support proper naming of search lookup button and show button.

It is now possible to set both video intro and outro image to the character '-' if no image is wanted.

Video assist image distortion problem solved.

Properties on the RecStart command has been extended to provide missing properties when importing from IFS Scope.

Missing password field template entry for IFS connector has been added.

IFS connectors extended to avoid the ampersand sign in text for checkboxes.

Problem with assist not loading the repository on the very first click has been resolved.

Speech Editor is now able to delete (mark as deleted) the entries located outside a workspace template.

New toggle button for editor preview has been added to the bottom right of the preview area.

The ClickLearn connector for Google Chrome has been changed. Going forward it will use Native Messaging and it is no longer required to checkmark this manually.

The warning message displayed when not waiting for the green rectangle will now automatically close after 5

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seconds.

The publish feature has been highly optimized. It is now required that your network has https access to upload.clicklearn.com.

New Microsoft Dynamics Business Central 2018 connector for the windows client.

21.1.13. Release 11.0.0.53, 2018-10-12

Missing template entries for listbox steps in IFS Apps 10 has been added.

Microsoft Dynamics 365 CRM connector has been extended to support Automated Process Testing.

Editor video preview has been extended to toggle audio on and off. Default is off to obtain the best speed.

Microsoft Dynamics 365 Business Central connector updated to support the 2018 Fall Release.

21.1.14. Release 11.0.0.52, 2018-09-28

New project type for building Dynamics 365 Business Central Help and ToolTips.

Connector extended to support for upcoming release of Business Central.

Fixed Flow role problem for grouped steps.

Automated Process Testing for Business Central.

HTML Video player extended to control speed of chapter fade in and out. Template need to be modified to set the new parameter.

Production problem with mixed language voices has been solved. Re-production required.

Problem controlling the video settings in SCORM packages has been solved.

Problem with replay of specific sub menus on all IFS connectors has been solved.

Empty lines in export of template entries for translation has been removed.

21.1.15. Release 11.0.0.51, 2018-08-31

SCORM package may now also include produced PDF document.

Problem with editing steps, where second language layer was overwritten with primary language, has been solved.

Adjustment of group rectangle is now supported for multiple languages.

Wrong offset when recording IFS Apps 10 login screen has been solved.

The recording list can now show the available meta data in new columns. You need to activate it from the view icon on the toolbar. The columns are inserted right after the name column.

New template entries added to define a start and end note for the HTML Video. Also an entry to specify a pause in seconds before the video reaches the outro screen.

Problem with IFS Apps 8 replay of combobox dropdown has been solved.

Improved import from IFS Scope tool when processes and activities has been excluded or re-ordered.

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Improved word index on meta data fields like the document id.

Problem with IFS Apps 8 replay of specific context menu items has been solved.

Problem with published content on multiple languages where main language wasn't english has been solved. Re-produce and re-publish is required.

21.1.16. Release 11.0.0.50, 2018-08-16

Missing replay editor settings for NAV 2018 connector has been added.

IFS Apps 10 replay of project navigator steps has been improved. Re-record may be required.

Missing template entries for IFS Apps 9 & 10 has been added.

Production of HTML video was incorrect if a group contained a note which was kept with the previous step. This has been solved.

Improved production of groups containing notes kept with next or previous steps.

Improved production of CRM help projects. Form fields will now use the entity field documentation as default.

Error in SCORM package build when template uses globalscript has been solved.

Problem with editing steps, where second language layer was overwritten with primary language, has been solved.

Out of memory problems when editing template or multiple large recordings has been solved.

IFS FSM connector has been improved for recording lists like Code Tables.

ClickLearn Assist application, Shelf and Book template scripts has been extended to support changes made in browser to support start of the ClickOnce application. Please remember that both Google Chrome and Firefox requires an extension to properly start the ClickLearn Assist ClickOnce application.

Microsoft Dynamics Business Central connector has been extended to improve recording of text when using the designer feature.

It is no longer required to checkmark the Word document producer in order to produce a PDF document.

New documentation in Global Replay Data to explain how to generate unique id's for automated process testing.

IFS Scope import module improved to update the project name for all process, book and shelf files.

Correction to Polish template text.

21.1.17. Release 11.0.0.49, 2018-06-22

Problem with language drop down menu for a produced shelf has been solved. It is required to re-produce the shelf.

Problem with data loss in NAV/CRM help projects has been solved.

Customized assist image on books and shelves will now be correctly used. This also includes changed font names and sizes.

IFS FSM connector has been improved to support label for password fields and special combo box items.



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New production type for CRM help project to use ClickLearn Shelf as CRM custom help front page. This new type is set as default for new projects.

Support for loading entity and form metadata from CRM v9.0 added.

Producer has been optimized with more than 20% in general and when producing Html Video more than 30%.

21.1.18. Release 11.0.0.48, 2018-05-28

Minor corrections to the IFS FSM connector.

Improved support for context menu items on the IFS Apps connectors.

New template entry named STEPNUMBER to control production of numbers for each step in a recording.

Support for new voice breath feature for all AP voices. This provides a more natural sound when speaking long sentences.

Beta release of new voices provided by Google. This adds more than 30 new voices to the ClickLearn Cloud voice library.

The Dynamics 365 Business Central connector has been updated to include cell and field values.

Fixed problem with custom audio duration in produced video.

Support added for Chinese and other languages to the Google Chrome connector.

Production problem with thumbnail picture of first real step after a series of notes with custom images has been solved.

Problems caused by incorrect voice culture or expired voice trial period has been solved.

Added better support for Dynamics CRM 2015.

It is now possible to work offline without logging into the ClickLearn Cloud.

Added support for record, replay and assist of keyboard combination Windows+Command.

It is no longer required to have Microsoft Word installed in order to produce PDF documents.

21.1.19. Release 11.0.0.47, 2018-04-23

Thumbnail and Video quality setting of 100% will now use .png files instead of .jpg files to really get full quality images. Re-produce is required.

Improved editor preview of the web page.

21.1.20. Release 11.0.0.46, 2018-04-16

The Dynamics AX 2012 connectors has been streamlined to support version 2012, 2012 R2 and 2012 R3.

Problem with US english keyboard recording of semicolon has been solved.

Problem with recording names including a ping character has been resolved.

Produced Shelves and Books now support usage of default document on an web server.

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Support for Microsoft Dynamics 365 Business Central web client.

Added support for the IFS FSM 5.7 menu navigation when recording, replaying and using Assist.

The produced shelf and book web page can now be controlled to start a specific language version using the lcid parameter. For example ?lcid=1031 for German.

Support added for import of IFS Scope Tool 10.

The recording list and global replay editor has been optimized for handling thousands of recordings.

21.1.21. Release 11.0.0.45, 2018-04-03

New template entry to add standard chapters and notes to the end of every new recording has been added. The recording template entry is named NEWRECORDINGSTEPSAFTER.

Problem with replay on rows with large amount of data has been solved. This effects all connectors.

Problem with replay of IFS Apps 8 and 9 package structure treeview has been solved. It is required to re-record the steps.

Serbian language has been added to the Microsoft Dynamics NAV connectors.

Template system has been extended to support language specific Word and PowerPoint template files.

New template entry to control the options for new groups has been added. The recording template entry is named NEWGROUPOPTIONS.

The Shelf template has been extended to support chapter, book and recording numbering on the produced web pages. Please refer to the Shelf template entry named RECORDING.

21.1.22. Release 11.0.0.44, 2018-03-15

New recording template preference settings introduced to control how numbered lists are displayed on group images.

The need to double click on the group features has been improved. Now you only need to do a single click to check or uncheck a feature.

Multi language support has been added to support custom menus defined in the Solution Manager for IFS Apps 8 and 9.

Support added for recording special characters from Icelandic keyboard layout.

The Windows version of ClickLearn Assist now support notes set with the placement keep with previous or next.

IFS Apps 8 and 9 connector has been extended to support the touch menu items in replay. Please note that there are big difference in how the items are arranged between Apps 8 and Apps 9 hereby making it impossible to convert automatically. These steps must be re-recorded.

Problem with recording and replaying equipment tree nodes in IFS Apps 8 & 9 has been solved. It is required to re-record the steps.

Production of a Word document will now refrain from adding it to the recent list of documents.

Problem with missing group image editor icon has been resolved.

Problem with replay in IFS Apps 8 & 9 right click on tab background has been solved.

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ClickLearn user will now be instructed to use Google Chrome when trying to record from Microsoft Edge or Internet Explorer.

Problem with NAV & CRM help projects where auto field help was missing has been resolved.

21.1.23. Release 11.0.0.43, 2018-02-28

ClickLearn has been extended to support the use of meta data tags in initial PowerPoint slide.

IFS Apps 8 & 9 support for sticky notes and Save as template has been added. Tested also for conversion from Apps 8 to 9 and multiple languages.

Support for Dynamics NAV 2017 when recording and replaying steps on expression filter selection on multiple yes/no list views.

Producing Window Media Video has been extended to set key frame image on notes with images.

Windows 10 update affected the Click and Continue and user termination of replay. This has now been solved.

Sending Technical Support will now add external images and audio files for recordings when available.

Merging text within group will now avoid double dots to be produced.

Support added for recording and replay of right click on the IFS Apps toolbar.

Support added for recording of custom menu items in multiple languages for IFS Apps connectors.

21.1.24. Release 11.0.0.42, 2018-02-05

New ClickLearn Learning Portal style. Customers may contact our Customer Care to get their current corporate template upgraded.

It is now possible to control the folder in which the ClickLearn Preferences is stored. Your IT department may set the environment variable `cl_programdatapath` to the path of the wanted folder.

Missing any row and any cell template entries for generic web applications have been added.

New preference setting to control the copyright label on NAV and CRM help projects.

21.1.25. Release 11.0.0.41, 2018-01-11

Minor template text changes for Microsoft Dynamics NAV connectors.

Minor changes to the license information dialog.

Problem with Microsoft Dynamics NAV CRM replay has been solved.

ClickLearn Studio will now auto save a hidden copy of the currently modified recordings every 5 minutes. If ClickLearn is shut down incorrectly you will be prompted to auto-recover these files the next time ClickLearn is started. These may be also be retrived manually from the C:\ProgramData\ClickLearn folder. The files are saved with a name like `as-IDrecordingname.clrx`. If you save the changes the copy will automatically be deleted, but if you discard the changes the copy will be moved to the recycled bin.

Improved warning if the user recording is not waiting for the screen rectangle.

All Microsoft Dynamics NAV connectors now supports the ribbon menu button and all it's menu items.

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Fixed problem with replay on Microsoft Dynamics NAV Web on new Job Journal lines.

New template text for Icelandic language.

Cloud translation services now also include language Icelandic and more.

PowerPoint producer has been extended to optionally create a specific slide for chapters. The slide must contain a text element with the text `##CHAPTERSLIDE##`.

21.1.26. Release 11.0.0.40, 2017-12-08

Problem with recording the business object nodes in the navigation tree has been solved for the IFS Apps 8 connector.

Problem with record and replay of message box buttons has been solved for all IFS Apps connectors.

This release has been set back to .NET version 4.0 to support existing customer installations without .NET 4.5.

Improved notification about the captured screen when using multiple monitors.

Support for replay of converted Dynamics NAV recordings on the new NAV 2018 web client.

21.1.27. Release 11.0.0.39, 2017-11-27

Missing template entries added for IFS connectors.

Microsoft Dynamics GP connector split into 2013, 2015 and 2016. Also, added converter for GP recordings.

Improved Google Chrome connector to support DL, DD and DT tags on web pages.

Release of the Microsoft Dynamics NAV 2018 Tenerife connector.

Incorrect HTML video template entry for Spanish has been corrected.

Translation import problem resolved.

IFS connector problem with record and replay of context menu items has been resolved.

Improved support for record and replay on lobby elements for IFS Apps 9 and 10.

Problem with replay of context menu on navigation items has been solved for IFS Apps 9.

Increased the sound length in the HTML video player to eliminate voice cut off at the end.

Microsoft .NET 4.5 is now required.

21.1.28. Release 11.0.0.38, 2017-10-31

Added support for shapes in the Excel connector.

New SAP template text for Dutch and Hungarian.

Incorrect NAV template entries in German has been corrected.

Translation menu now available on recording list level.

IFS connector replay will now handle message boxes automatically if they are only information or warning boxes that did not appear when the original recording was made.

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IFS Scope tool import extended to highlight activities on the flow chart image and load additional text in English when available.

Google chrome connector improvements has been made.

Dynamics 365 CRM connector has been added.

Recorder problem with special characters has been solved.

21.1.29. Release 11.0.0.37, 2017-09-28

Added support for the new Chrome browser version 61.

Updated template entries for Polish language.

Fixed problem with whitelabel of assist in production of books and shelves.

Updated template text for Korean language.

21.1.30. Release 11.0.0.36, 2017-09-07

New connector for IFS Apps 10 has been released. Some work is still pending regarding new row selector element and possibly other new elements.

New template text for Korean language.

New language translation export to Excel, which may be re-imported.

ClickLearn Assist repository may now control the application with custom name and icon.

The standard ClickLearn template is modified with a new logo, corporate color and show me, try me and test me video icons.

21.1.31. Release 11.0.0.35, 2017-08-25

Problem solved with the Assist voice reading large notes.

Robotic Process Automation on IFS has been released.

IFS FSM connector released to support 5.7.

Added support for special sub menus in all Dynamics NAV connectors.

Problem in the Dynamics NAV converter from RTC to Web has been solved.

Note kept with previous step is now produced correctly in Windows Video format.

Voice problem when note with previous starts with an empty line has been resolved.

21.1.32. Release 11.0.0.34, 2017-08-11

Link to download NAV TestPages and Performance Test code was not working.

Missing libraries for the ClickLearn Assist audio feature has been added to the MSI installation package.

Added support for SAP NetWeaver Business Client.

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Beta support for IFS FSM 5.7 in the FSM connector.

Problem with speech editor entries stored in workspaces has been solved.

Refresh problem in the NAV Help editor has been solved.

Missing template entries for the NAV month calendar control for German has been added.

21.1.33. Release 11.0.0.33, 2017-07-11

Production of the SCORM 1.2 packages now sets the session suspend data.

All IFS connectors has been improved for replay and assist when required to scroll tabs and work area.

Production of NAV Help package zip files has been improved to support larger files.

Auto translation of standard ClickLearn template text has been added for Thai.

21.1.34. Release 11.0.0.32, 2017-06-28

Memory limit in all connectors caused replay error on a specific IFS Apps 9 recording. This has been solved.

Production of the SCORM 1.2 packages now sets the session time.

21.1.35. Release 11.0.0.31, 2017-06-26

Production of the SCORM 1.2 packages has been modified to include a commit call to support LMS systems that requires it.

All IFS connectors has been extended to support replay of right click on empty grids.

Filter for content not available has been added to the NAV Help editor.

The Chrome Connector has been extended to support native messaging when localhost communication is not allowed.

Dutch language text improvements for all Dynamics NAV connectors.

New voices available for Arabic, Spanish, Czech, Danish, German, Greek, English, Finnish, French, Hebrew, Hungarian, Indonesian, Korean, Norwegian, Dutch, Polish, Portuguese, Romanian, Slovak, Swedish, Thai, Turkish and Chinese.

ClickLearn Assist will now automaticallt sense when user moves the application window while waiting for action to be taken.

21.1.36. Release 11.0.0.30, 2017-05-30

Meta data is now included in the search index of produced books and shelves.

Problem with record and replay on Dynamics NAV 2016 64-bit when grid cell contained a backslash has been solved.

The Dynamics 365 connector now reports the text from ribbon buttons connectly when it contains multiple lines.

LS Retail connector support for Dynamics NAV 2009, 2013, 2015. Also including support for localized versions of POS buttons.

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Fixed Windows Video pause problem in production.

21.1.37. Release 11.0.0.29, 2017-05-06

Notes with placement previous or next is now correctly added in books and shelves.

Video pause is now more accurately placed in videos before screen content changes.

New Polish translation for all Dynamics NAV connector versions.

D365 NAV Connector improved with proper capture of multiline text on ribbon buttons, correct replay on option field combo boxes.

Support for the LS Retail POS Web client has been added as an extension to the D365 web connector.

21.1.38. Release 11.0.0.28, 2017-04-18

Improved Word Document production.

Speech editor problem with saving in workspace has been solved.

New Cloud voices available for Russian, Czech and Slovak.

Producing SCORM packages now support customization for reporting to LMS using the AICC HACP protocol.

New Google Chrome extensions for Microsoft Dynamics 365 Financials.

Beta release of converting recordings from Dynamics NAV Windows to Web.

21.1.39. Release 11.0.0.27, 2017-03-26

Right click on selected recordings, books and shelves now includes a translator service. It is also available on all steps in the properties dialog for multi language fields.

Instruction text property may now include %0 to insert the original step instruction text at the exact spot in the customized text.

The produced date is now displayed when production has been done for a none primary language. Also the View, Open folder menu has been extended to support multiple languages.

Property changes on ClickLearn Studio files will now be stored in and retrieved from the source files and not just in the local recording list.

Problem with some Speech editor entries in German has been solved.

The Note placement has been extended to place a note with the previous or next step.

New Cloud voices available for Arabic, German, English, Spanish, French, Italian, Japanese, Portugese, Russian and Chinese.

The Windows Media video producer has been updated to remove unwanted noise in the beginning of a sentence.

Added support for Dynamics NAV TestPage code that requires specific handler functions for CONFIRM, STRMENU and modal page dialogs.

Support for LSRetail POS controls in Microsoft Dynamics NAV 2016 and 2017.

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The build of SCORM packages is extended to support adding custom files.

Minor corrections of German template entries for the Microsoft Dynamics NAV connectors.

The standard release of ClickLearn now holds auto translated template text for the languages Danish, German, Dutch, French, Spanish, Portuguese, Simplified chinese, Swedish, Polish, Arabic, Czech, Norwegian, Russian, Greek, Turkish, Italian, Hungarian and Japanese.

Missing template entries for the IFS Applications connectors has been added.

21.1.40. Release 11.0.0.26, 2017-02-24

Minor produce problem in groups where step included shortcut text has been solved.

Several improvements has been made for producing Microsoft Dynamics NAV TestPages.

Performance improved by 30% when using ClickLearn Assist on all enterprise connectors.

The Dynamics NAV 2017 connector now replays the right option field position.

The IFS FSM connector now support all 3 installation types: production, development and test.

Learning Portal has been extended with a new SharePoint book.

All videos in the Learning Portal now includes a control board for pausing, muting, shifting between panning and scaling and playing in full screen mode.

21.1.41. Release 11.0.0.25, 2017-02-09

Problem with group checkboxes in the editor has been solved.

Added support for the column chooser dialog in the IFS Applications 8 connector.

Added support for helping users know if the AntiVirus has blocked for the recorder to be started.

21.1.42. Release 11.0.0.24, 2017-02-08

Assist issue in IFS Applications 8 connector on search criteria dialog has been solved.

Minor produce problem has been solved.

Please note, very long recording filenames may lead to unplayable flash videos.

Steps may now be excluded according to selected languages. This will affect editing, producing, replay and assist.

Problem with ribbon button drop down menus in the Dynamics NAV 2013 connector has been solved.

21.1.43. Release 11.0.0.23, 2017-01-30

Unsupported .NET language codes can no longer be added as language option in ClickLearn.

The Dynamics NAV Classic connector has been extended to support forms where no tabs have been defined.

The NAV Performance test code was saved in HTML format within the solution file. This has now been corrected.

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All IFS Applications connectors has been extended to support the correct custom field names during record, replay and assist.

The ClickLearn learning portal has been updated and is now located at <http://help.clicklearn.dk/ClickLearn%20Learning%20Portal/ClickLearn%20Learning%20Portal.htm>

Bad build of the .msi installer has been fixed.

21.1.44. Release 11.0.0.22, 2017-01-19

Several improvements has been made for producing Microsoft Dynamics NAV TestPages.

The NAV Help project now supports dragging table fields into the content and make them links to the help pages for the table fields.

ClickLearn Cloud login now supports connections through a proxy server.

Hotspot color and thickness may now be controlled on template level.

The Dynamics NAV connector now records the right option field position for replay.

The video role in the editor is changed to use the HTML video format instead of the SilverLight format, and selecting a step will jump directly in the video sequence.

Problem with NAV Help project production due to special characters in license name has been solved.

NAV Help projects will now also import extension tables and pages.

New connector for IFS FSM 5.6.3 - Field Service Management.

21.1.45. Release 11.0.0.21, 2016-12-02

All Microsoft Dynamics NAV connectors has been extended to support VB.NET developed dialogs.

The context menu in the editor now includes a new item to record new steps, which is pasted in directly before the selected step.

All Microsoft Dynamics connectors has been corrected due to error in replay when fixed row or select all option on keyboard input was selected.

Problem when pasting multiple steps at the end of a group has been solved. The order of the pasted steps is now correct.

Problem with connect on NAV TestPages has been solved. Please remember to use C/Front form databases prior to version 2013.

Problem with ribbon drop down menus in the 64-bit Microsoft Dynamics NAV 2016 and 2017 connector has been solved.

It is now ensured, that open tabs will be closed before replay, assist and produce is executed for the selected recordings.

Problem with editing a keyboard step only containing the key commands <delete> has been solved.

The group editor now allows resize of crop area in all corners.

Problem with cut off letters and intro image flicker in produced Windows Video has been solved.

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All connectors has been changed to resolve problem with recording fields with very large text content.

PowerPoint producer extended to support both front and back slides.

HTML Video now displays bookmark images.

21.1.46. Release 11.0.0.20, 2016-10-23

The Book and Shelf template now includes a globe icon when producing more than one language. Clicking the globe icon will let the user select any of the produced langauges.

Extended Replay preview for Microsoft Dynamics NAV Service Provider edition now inlcudes a download link for a import file to the NAV development environment and a Visual Studio solution as a .zip file.

21.1.47. Release 11.0.0.19, 2016-10-10

NAV Help project issue with auto loaded table field descriptions has been solved. The editor now shows the custom entered correctly.

The produced HTML Video now produces correct lines breaks.

New Microsoft Dynamics NAV 2017 connector has been released.

Pre-release of extended Replay preview for Microsoft Dynamics NAV Service Provider edition customers. Transforms recording into NAV TestPage C/AL and .Net Performance Test code.

21.1.48. Release 11.0.0.18, 2016-09-23

Solved memory problems with Microsoft Dynamics NAV Classic connector.

21.1.49. Release 11.0.0.17, 2016-09-08

Books and Shelves may now be produced even if the user does not have all of the recordings available in the list of recordings, as long as the recording file is accessible.

Multilanguage issues with the Microsoft Dynamics NAV Web connector has been resolved.

Production time of Books and Shelves has been improved by more than 40% due to optimized Word automation.

Memory problem with the Microsoft Dynamics NAV connector update has been resolved.

The produced shelf with link to the Assist has been extended to solve technical problem with the ClickOnce technology not being able to pass arguments from a web page.

21.1.50. Release 11.0.0.16, 2016-08-24

IFS connector update for the assistant to find the correct visible company field on the customer card.

Solved problem where an assist with very wide text displayed the arrow pointing at the action area was off.

21.1.51. Release 11.0.0.15, 2016-08-23

IFS connectors has been updated due to replay issue on steps where colum data was modified.

The replay click and continue has been corrected to prevent the window from stealing focus from the real application.

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Fixed incorrect position of ClickLearn Assist image when click area was very wide.

ClickLearn Assist has been fixed due to incorrect termination of the assistant when pressing the right control key.

Improved replay and assist on the Microsoft Dynamics AX 2012 R3 connector.

Improved error handling when trying to save a book that is currently being produced.

21.1.52. Release 11.0.0.14, 2016-08-15

Assist problem in all IFS connectors regarding field with right positioned text field has been solved, so that it locates the right field.

Fixed missing recording title and custom audio speed in the produced Windows Media Video format.

ClickLearn Assist extended to load .xml repository from SharePoint sites without receiving a 403 Forbidden error.

21.1.53. Release 11.0.0.13, 2016-07-11

IFS connector issue with incorrect shortcut text on navigation steps has been solved.

IFS connector extended to support right click in the background of a grid.

ClickLearn Cloud voices has been corrected due to an error in mixing French and English.

The producer has been optimized with approx. 10% in speed.

The Speech Editor will now save the customized words in the workspace if the currently selected template is stored in a workspace.

The Google Chrome connector has been corrected due to memory issues.

21.1.54. Release 11.0.0.12, 2016-06-16

Microsoft Dynamics NAV Web connector improvements for the 2016 version.

Spellcheck introduced in the NAV Help editor. It is required to install the Windows language pack for each language used.

Improved multi language support for Microsoft Dynamics AX 2012 R3.

Microsoft Dynamics NAV Classic connector update issue with very long descriptions has been solved.

The recording list may now be filtered according to project name. The filter may be set in the drop down group view button.

Improved hit test in the Google Chrome connector.

Custom audio storage in recording has been redesigned. The recording will automatically be updated if needed when edited.

21.1.55. Release 11.0.0.11, 2016-05-06

Minor changes to the standard ClickLearn template.

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21.1.56. Release 11.0.0.10, 2016-04-28

New feature allows easy creation of SCORM 1.2 compliant packages from books and shelves.

Improved user interface for the replay error assistance.

New lessons in the ClickLearn Learning Portal for the book Replay.

NAV Help module now compiles CHM files for recordings using language specific characters.

NAV Help module now embeds produced HTML, Video and other formats in the compiled CHM file.

New feature to turn audio off on all relevant steps.

Beta release of tracking for Google Analytics and SharePoint. Setup possible in the Shelf preferences.

Standard ClickLearn template changed for playing Flash video. The auto loop is now default set to false and click on video will now toggle play and pause.

21.1.57. Release 11.0.0.9, 2016-04-08

The NAV Help producer will now include the bookmark images in walkthroughs.

Shelf template extended to provide easy javascript for custom elearning control of the HTML video.

Microsoft Dynamics NAV Classic connector improved recognition of forms with identical names.

21.1.58. Release 11.0.0.8, 2016-03-30

The pan in the produced flash videos has been refined in connection with wide fields.

Using the thumbnail editor for keyboard steps froze the application. This is now solved.

21.1.59. Release 11.0.0.7, 2016-03-21

Problem using cloud voices in NAV help projects have been solved.

Microsoft Dynamics NAV connector extended to support special field definition with dropdown and assist edit combination.

Insertion of metadata in produced Word document ##MCLDOCID## etc. is now working.

New Slovak and updated Czech translation for the Microsoft Dynamics NAV connectors 2009, 2013, 2015 and 2016.

21.1.60. Release 11.0.0.6, 2016-02-26

IFS connector extended to pick up system and login information when recording navigation tree steps, which enables customers to produce test scripts and send them to IFS.

New required sign for the Mozilla Firefox extensions has been made.

Deleting recording files will now add deleted recording to the recycle bin.

New Czech and Croatian translation for the Microsoft Dynamics NAV connectors 2009, 2013, 2015 and 2016.

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Improved production of subtitles and cursor movement in the Windows Video format.

Missing module for the ClickLearn Cloud voicing in the .msi installation file has been added.

21.1.61. Release 11.0.0.5, 2016-02-05

HTML embedded video not working in Google Chrome has been solved.

The default book and shelf template has a new footer with links to the preview and next work instruction.

The NAV Help merger did not insert into none ClickLearn produced help topics, if the topic did not have a see also section. This have now been changed, so that you still receive a warning, but the content will be inserted anyway, but without the see also links.

Recording keyboard action now support use of CAPS LOCK.

The standard template has been extended with Dutch translation for the NAV Help project production.

21.1.62. Release 11.0.0.4, 2016-01-25

A module was missing a digital signature.

21.1.63. Release 11.0.0.3, 2016-01-18

Improved German text for all Microsoft Dynamics NAV connectors.

Support for recording of Microsoft Dynamics NAV print preview toolbar.

Using a customized word document template produced incorrect heading styles. This has been solved.

SCORM package build has been changed to avoid special language characters in filenames because some LMS systems lacks support for it.

ClickLearn Studio editor preview performance improvement.

Issue with workspace templates unable to store language characters correctly has been solved.

Minor improvements to the Microsoft Excel connector. Now provides %c for column name and %r for row id within the Instruction Text field.

New Slovenian translation for the Microsoft Dynamics NAV connectors 2009, 2013, 2015 and 2016.

Support for ribbon menu button and items in the Microsoft Dynamics NAV connectors.

Language independant support for option fields in the Microsoft Dynamics NAV connectors.

Minor speed and functionality improvements producing NAV help projects.

It is now possible to purchase access to 51 voices covering 23 languages. Please contact ClickLearn.

Extra security has been added to prevent deletion of production directories containing ClickLearn recordings, books, shelves and NAV Help projects.

Microsoft Dynamics NAV recordings can now also be converted to prior versions, e.g. from 2016 to 2015.

Troubleshoot option introduced to allow Citrix installations to use a user specific path for the ClickLearn recording list.

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Problem with replay of a drop down toolstrip menu in the Microsoft Dynamics NAV connector has been solved.

21.1.64. Release 11.0.0.2, 2015-10-31

Improved information when trying to record from applications within a remote desktop connection.

Support for Windows 8 scaling in the Microsoft Dynamics NAV 2015 connector.

Microsoft Dynamics NAV 2016 connector released. The connector support the 32-bit and 64-bit version of the client.

It is now possible to convert recordings made for Microsoft Dynamics NAV 2009, 2013, and 2015 to 2016.

Improved capture of text in the Microsoft CRM 2015 connector, and performance improvement on replay.

21.1.65. Release 11.0.0.1, 2015-10-02

New ClickLearn NAV Help module.

Single project for multiple languages in NAV Help.

Transformation of ClickLearn recordings to Walkthroughs in NAV Help.

Automatic cross reference links in help in NAV Help.

Add custom sections to standard NAV help on multiple levels.

Free Help merger for easy installation and maintenance of NAV help packages.

Support for Dynamics NAV 2015.

Support for Dynamics NAV 2015 Web client.

Support for Dynamics CRM 2015

Support for Dynamics GP 2013

Support for Dynamics AX 2012 R3

Javascript driven web assist for Dynamics NAV Web client.

Easy server installation will enable the web assist to run on any device.

Use of Firefox extension does not require any server modification using the web assist.

Option to use ClickLearn Cloud repository for web assistants.

Easy production of SCORM compliant packages for LMS systems.

Full text search in produced learning portal.

HTML video format improvements.

Mixing languages in automatic text to speech translation.

Insertion of metadata in produced Word document and PowerPoint slides possible using ##MCLDOCID## etc.

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21.2.1. Release 10.0.0.92, 2015-09-20

Improved support for record and replay of Microsoft Dynamics NAV 2013/2015 expression filters.

21.2.2. Release 10.0.0.91, 2015-08-24

ClickLearn Learning Portal updates.

21.2.3. Release 10.0.0.90, 2015-08-21

Minor error dialog popup when using the thumbnail editor on a step has been solved.

New connector for Microsoft Dynamics AX 2012 R3 has been released.

New connector for IFS Apps 9 has been released. Some work is still pending regarding lobby and chart elements.

It is now possible to convert recordings made for IFS Apps 7.5 and IFS Apps 8 to IFS Apps 9.

The step editor template option has been restricted only to work if a custom recording template has been selected.

21.2.4. Release 10.0.0.89, 2015-08-09

ClickLearn Learning Portal updates.

Issue with IFS Apps 7.5 replay of navigation links has been resolved.

21.2.5. Release 10.0.0.88, 2015-06-28

The IFS Apps 7.5 and 8 connector have been extended with support for new user interface controls and new template text entries.

The book and shelf template have been improved with text highlighting with searching for text.

Added support for recording in Remote Desktop sessions with 16-bit color setting.

The repeater function for data driven testing has been extended to support all language characters.

21.2.6. Release 10.0.0.87, 2015-06-15

The Microsoft Dynamics NAV connector 2013 and 2015 has been extended to provide shortcuts and tooltip text on ribbon button items.

A new connector for IFS Applications 7.5 has been released.

The Microsoft Dynamics NAV Web connector have been extended to record language independant.

21.2.7. Release 10.0.0.86, 2015-06-07

Solved HTML video issue with Internet Explorer not being able to click on action area to continue.

Added feature to produce Word documents with extended image size control. The attribute max may be added in the template on the img tag. For example .

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Solved issue with modification of a template entry from within a recording step.

Improved retrieval of tooltip text on all image button controls for the IFS connector.

Solved issue with paste of steps into very large recordings, which may have led to incorrect screen content.

The replay and assist feature of the Microsoft Dynamics NAV connector has been corrected when creating multiple lines. For example on a sales order.

21.2.8. Release 10.0.0.85, 2015-03-24

Word index on shelf problem with search including Danish letters has been solved.

Added possibility to create a workspace in the workspace dialog.

Fixed possible application crash in all Microsoft Dynamics NAV connectors, where image columns were present in lists.

New feature allows easy creation of SCORM 2004 compliant packages from books and shelves.

IFS connector extended with missing template entries and support for spin buttons.

Support added for Windows 8 DPI scaling on 4K monitors.

Mozilla Firefox connector now supports the zoom factor the browser is working in.

21.2.9. Release 10.0.0.84, 2014-12-22

HTML video player now support playback on Internet Explorer 9 without service packs installed. Additionally, the embedded player now has correct position when opened in Firefox.

Added feature to produce Word documents with cell span. The span may be added as attribute in the template on the cell tag. For example `<c span="2">`.

Connector for Microsoft Dynamics NAV 2015 released.

Beta release of connector for Mozilla Firefox. This requires installation of a Firefox extension.

Connector for Microsoft Dynamics NAV classic has been extended to support the NAV 3.6 & 4.0 old menu style.

Template extended to provide standard text for keyboard Ctrl + Alt + X press.

21.2.10. Release 10.0.0.83, 2014-11-17

IFS navigation tree difference between version 4.80.0.0 and 4.80.28.0 is now supported by the connector to provide correct rectangle on nodes.

Missing template entries have been added to the IFS connector template.

Recording mouse move with Ctrl+Shift may have recorded a lot of steps if pressed for a long time. This is now solved.

Problem with replay of Danish recording due to incorrect encoding has been fixed.

Beta release of connector for Microsoft Dynamics NAV 2015 Web.

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21.2.11. Release 10.0.0.82, 2014-10-31

Assist handling of very long recordings names changed to prevent word break.

IFS connector improved when having to automatically scroll down in search field listing.

IFS connector problem with attachment documents has been solved.

Handling of keyboard CTRL+x is now supported.

21.2.12. Release 10.0.0.81, 2014-10-23

Problem with loading Danish recording due to incorrect encoding has been fixed.

21.2.13. Release 10.0.0.80, 2014-10-21

Automatic multi language voice mixing. For example English screen content and user interface text with German templated text.

Standard template improved for English, Danish, German, French, Dutch, Spanish and Portuguese.

The Word and PowerPoint producer will now maintain double line breaks.

Minor modifications to the IFS connector.

Notes with large images are now produced correctly in all formats.

A group which only contain notes is now produced as a bulleted or numbered list.

Book and shelf template extended with word index for build in search.

Shelf editor extended with option to insert chapters.

Settings for the recording list will now be stored and retrieved when ClickLearn is restarted.

21.2.14. Release 10.0.0.79, 2014-10-02

The learning portal is now integrated in the ClickLearn Studio application. Press F1 to access it, and it will open in a tab.

Assist now supports remote desktop connection issue with missing aero theme.

Assist double click sometimes advanced even on single click. Now solved.

21.2.15. Release 10.0.0.78, 2014-09-04

It is now possible to adjust the thumbnail, group and bookmark rectangle in the editor

Replay/Assist support for IFS calendar box

21.2.16. Release 10.0.0.74, 2014-08-28

Copy/Paste now includes group definitions

Click in preview will select and focus in step tree

Available languages may now be selected in priority in the preferences of ClickLearn



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Assist now has a minimize button to hide the instruction until the user restores assist from the windows taskbar

Keyboard input now has a select all for replay to select any existing content before input

21.2.17. Release 10.0.0.67, 2014-07-02

The IFS connector has been released.

21.2.18. Release 10.0.0.48, 2014-02-11

The editor have been extended with copy/paste possibility, which will include the screen content. Please be advised, that this functionality will allow easy modification of existing recordings without replaying the entire recording. However, this will decrease the level of quality assurance, if you do NOT replay the recording after pasting steps from another recording.

21.2.19. Release 10.0.0.40, 2014-01-26

Development of a new connector for the ERP system IFS is started. This will in the next period of time increase the number of releases. The releases will not affect the existing functionality of Clicklearn Studio or your current connectors.

21.2.20. Release 10.0.0.26, 2013-08-11

This release introduces a new customizable Assist. The assistant may also, include a mascot.

A new connector is released for Java based applications. This includes products like Oracle Financials.

21.2.21. Release 10.0.0.1, 2013-05-28

ClickLearn has released the new version 10 as a Click-Once application. A completely new user interface have been developed, and all existing customers may now benefit from easier editing of recordings without having to replay first.

A Click Once applications means, that all customer selecting this approach, will always have access to the newest release automatically.

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