

**Oracle® User Productivity Kit**  
In-Application Support  
for Version 12.1.0.2

E65159-01  
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**ORACLE®**

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# 1 In-Application Support Overview

The Player deployment format that is published from the Developer is not only useful in various training and educational initiatives; it is also designed to provide in-application support for end users.

There are specific add-ons and instructions for certain major enterprise applications to accommodate context-sensitive in-application support; these applications are referred to as target applications throughout this document. Content can generally be deployed using one or both of the following methods, depending on the target application:

- **Help Integration:** The users invoke the context-sensitive content using a button or an entry in the target application's menu. This requires the application administrator to make minor configuration changes in the target application.
- **SmartHelp:** SmartHelp also offers in-application support for non-target browser applications where help integration may not be a viable option. SmartHelp can be used for target and non-target applications and offers additional advantages. SmartHelp, which is tightly integrated in the browser, allows users to open a sidebar showing the best matches for the currently displayed page in the application. In addition to offering support where help integration is not possible, SmartHelp can handle multiple content locations for multiple applications. Using this component, users can access and search multiple content sources with a single action. SmartHelp requires installation of a browser add-on, which may require the help and approval of Information Technology resources.

## 1.1 Plan for Deploying In-Application Support

Once you decide to deploy content for in-application support, some of the fundamental questions that need to be addressed are:

- What deployment mechanism is most appropriate for your application, Help Integration with a target application, SmartHelp-based deployment, or both?
- Who needs to be involved, what needs to be done, and when does it have to happen?

Understanding the answers to these questions will give you the information you need to implement help integration and context-sensitive help successfully.

These are the tasks which need to be completed to successfully deploy in-application support.

### Content Author

- **Create content in the Developer:** While context for many applications will be automatically captured, it is recommended that you validate that context is being captured. You can check this by opening the topic in the Topic Editor and then opening the Context ID editor. If the Type field displays SmartMatch or ExactMatch, context was captured. If it displays NoMatch, no context was captured. In addition, while you are recording a topic, there is an icon in the Recorder which shows context recognition status.
- **Create an IAS Configuration document in the Developer:** Consult with the application and content web server administrators to find out the necessary URLs.
- **Give the published content to the web server administrator, or publish the content to Knowledge Center.**

### Web Server Administrator

- Deploy the published content to a web server.

### Application Administrator

- Perform the configuration steps detailed in this guide for each application.
- Receive the content URL from the web server administrator. If the content has been published and deployed to the web server, the `iasinfo.html` page in the deployed content can be launched to get the URLs which must be configured on the server.
- Perform help integration steps for URL configuration, if applicable.

### Test User

- Verify the published content appears from the application using the Help Integration option or SmartHelp.

If you are deploying context-sensitive help, the test user should coordinate with the content developer to note which parts of the application were used to create content and then verify that the content launches with an appropriate list of relevant topics.

## 1.2 Target Application Configuration and Content Creation

For most target applications, application configuration can occur after and independently of content creation, if the exact path to the content, including the folder and name of the gateway, is known in advance. There are exceptions:

- Oracle E-Business Suite: It requires library files to be installed on the application server (applcore forms server) before recording content. See *Implement Context-Sensitive Help Integration in the Oracle E-Business Suite* section later in this guide for more information on installing library files for Oracle E-Business Suite.

**Note:** Oracle E-Business Suite 12.1.2 no longer needs the library files; however, you should add a profile in the System Profile form.

- PeopleSoft Enterprise: It is recommended that PeopleBooks be installed and configured before starting to record content. You can also use the hosted PeopleBooks from Oracle, but it must be configured to have the Help link displayed which is required for recording content.
- Oracle Fusion Applications: Oracle User Productivity Kit must be registered in Fusion before content can be recorded.

If you want to deploy context-sensitive help, always check that context is being captured while recording. See *Context Recognition in the Recorder* in the Record and Edit Topic Content chapter of the Content Development guide for more information on capturing context while recording.

## 2 Implement In-Application Support

End users access in-application support in one of two ways. The first is via a help link, button, or menu item in the target application. This option is called help integration and requires an application administrator to make minor configuration changes in the target application to enable the Player context-sensitive help. The second option, called SmartHelp, is to install a browser add-on. This may require the help and approval of your Information Technology resources.

The SmartHelp browser add-on provides context-sensitive in-application support for enterprise applications as well as comprehensive search across multiple sources, that is, Players. It can search sources only to which the user is subscribed. When it detects where the user is in the application, it provides the user with help topics tailored specifically for the current browser page from the available sources.

Applications supported by:

### SmartHelp only

Oracle (Siebel) CRM On Demand  
 Oracle Transportation Management  
 Any browser-based application with HTML user interface (as long as the browser/version is supported by SmartHelp)

### Help Integration only

JD Edwards World  
 SAP GUI for Windows

### SmartHelp and Help Integration

Agile CNM  
 Agile PLM  
 JD Edwards EnterpriseOne  
 Oracle E-Business Suite (SmartHelp not supported for Oracle Java Forms)  
 Oracle (Hyperion) EPM  
 Oracle Fusion Applications  
 Oracle Knowledge Center  
 PeopleSoft  
 Primavera P6  
 Primavera Contracts Management  
 SAP GUI for HTML  
 SAP NetWeaver Portal  
 Siebel CRM (On Premise High Interactivity and Open UI Applications)

Refer to the following information for the general steps to implement SmartHelp and/or Help Integration. Details about each step are in the following sections.

### Implement SmartHelp

- Create content in the Developer and create an IAS Configuration document for the content. See *Configure Content* for more information.
- Install SmartHelp by deploying a link or pushing it to the end users. See *Install SmartHelp* for more information.
- Publish the content and deploy it on a web server or publish it to Knowledge Center.
- SmartHelp recognizes it as a possible source and offers it for subscription. After the source subscribed, it is used by SmartHelp in the search.

## Implement Help Integration

- Create content in the Developer and create an IAS Configuration document for the content. See *Configure Content* for more information.
- Publish content and deploy it on a web server or publish it to Knowledge Center.
- Integrate help into the target application by adjusting settings in the target application to launch the content. See the appropriate section for your application in *Integrate Help for Target Applications*.

## 2.1 Configure Content

Whether you are configuring content for SmartHelp or help integration or both, you use IAS Configuration documents in the Developer. These documents contain options that allow you to associate the configuration with specific content, control launch behavior, and set up rules for the context search. The configuration document is dynamic; as you select options other options may be hidden or may appear.

A configuration document can be stored anywhere in the Library. It is recommended that the configuration be stored in the same folder as the root outline item, and when saved, saved with the same name as the root outline item. This makes it easier to select the correct configuration document when the content is published. Also, the configuration document is not automatically selected as a related document if you export the outline into an odarc. If the IAS Configuration document is stored in the same folder as the root outline item, the document and the outline item can be easily selected to be exported together.

In an IAS Configuration document, you create a configuration and associate it with content in the Library. When you publish the content, you select the IAS Configuration document in the Publishing Wizard, and the appropriate files are published with the content.

 To create a new IAS Configuration document:

1. Open the Developer.
2. On the **File** menu, point to **New** and choose **IAS Configuration**.

### Configuration Overview

When you create a new configuration document, there are two main sections, Sources and Application Instances. The Sources section allows you to "enable" content for use with SmartHelp and define different types of content for help integration. The Application Instances section allows you to configure specific applications to use SmartHelp and/or Help Integration, and define which Sources can be used for either one.

The examples below are for different situations to help you understand how the options in a configuration document relate to each other. Each example assumes you have started by creating a new configuration document. Refer to the sections that follow for more information about each of the options in the Configuration document.

Example 1: Configure a single application for SmartHelp.

1. In the Sources section, choose the Player content in the Library and be sure that the Allow SmartHelp option is selected. If you are deploying the content on web server and not through Knowledge Center, enter the URL where the content is deployed.
2. In the Application Instances section, choose the application from the Type list, enter a name, and select the source from those available in the SmartHelp Sources list.
3. Define the SmartHelp URL Rules.



Example 2: Configure a single application or multiple applications to use multiple SmartHelp sources. You can define as many SmartHelp Sources as you need for an application.

1. In the Sources section, choose the Player content in the Library and be sure that the Allow SmartHelp option is selected. If you are deploying the content on web server and not through Knowledge Center, enter the URL where the content is deployed.
2. Still in the Sources section, add a new source, choose the Player content, and enable it for SmartHelp. Repeat for as many different outlines as you need.
3. In the Application Instances section, choose the application from the Type list, enter a name, and select the sources in the SmartHelp Sources list.
4. Define the SmartHelp URL Rules.
5. If you want to configure multiple applications, add a new application and repeat steps 3 and 4.

Example 3: Create a configuration document for an application that supports help integration.


1. In the Sources section, define a source or sources as necessary. Content can be from the current Library, content from another Library, the original application help (for certain applications), or any URL, although one of the sources must be Player content from the current Library.
2. In the Application Instances section, choose the application from the Type list, enter a name, and select the Help Integration option.
3. For the first tab for the integrated help, choose a Player content from the current Library.
4. If desired, segment the content, for example for different languages.
5. Add tabs or links as desired to include additional sources of help, such as more Players, the original application help, or any URL.

### 2.1.1 Sources

The Sources section in a configuration document allows you to define sources, including the content and the type of deployment. There are four types of sources:

- Player content in this library: Content created in the current library and linked in an outline. This type of source is required for SmartHelp.
- Player published from another library: Content created in a different library, published to a Player and deployed on a web server.
- Original application help: Applies to Oracle Help, PeopleBooks for PeopleSoft, and Siebel Help only.
- Any URL: Any URL on the Internet or company intranet that users can access.

A new configuration document opens with an empty source so that you can specify the first one. You should always specify at least one source that is Player Content in this Library. This associates the IAS Configuration document with content so that it can be published. For SmartHelp, you must specify Player content in the current library. All other types of sources are for help integration. You can have multiple sources, so you can add configurations to include different types of content as needed.

 To add a new source:

1. In a configuration document, click the **add new** link in the Sources section.
2. In the **Type** list, select the type of content.

The options vary, depending on the type of content you select. The sections below detail the options.

### Player Content in This Library

No options can be set for this type of source until you select content.

- **Title:** The Select Outline button opens the Select Outline dialog box so you can browse the library and select the content.
- **Caption:** Use this option to specify a shorter, user-friendly name for the content outline you chose. This shorter name is used on the gateway tabs and link menu if you set up help integration.
- **Language:** The language defaults from the content you chose.
- **Description:** The description defaults from the Description property of the module or section you chose.
- **Deployment Type:** Allows you to specify whether the content is deployed through Knowledge Center or a web server.
- **Deployed Content URL:** This field appears if you select Web Server as the deployment type, and it is a required field. Enter the URL that can be used to access the content on the web server.
- **Allow SmartHelp:** Allows you to specify whether this content appears in the SmartHelp sidebar. Allows you to select the content as a source for SmartHelp for an application. Also causes the Global Settings for SmartHelp section to appear.
- **Public Subscription URL:** This field only appears if you select web server as the deployment type and SmartHelp is allowed. It is only required if the content is deployed behind authentication. Enter the full URL from which the user can subscribe to the content so that it appears in the SmartHelp sidebar. The URL should end in `cdd.html`. The `cdd.html` should be from the published Player, copied to a publicly available location.
- **Export Player Configuration:** Exports the gateway and configuration files that you need for help integration and SmartHelp. The output should be copied into a previously published Player. This option allows you to export the configuration files without having to republish the content. It only appears if you have selected Web Server as the deployment type.

### Player Published from Another Library

- **Title:** The title for the source. This title should be the same as the title of the external Player. This is used as the title of the window in the browser when the Player is launched through the gateway when using help integration.
- **Caption:** Use this option to specify a shorter, user-friendly name for the content outline you chose. This shorter name is used on the gateway tabs and link menu if you set up help integration.

- **Deployed Content URL:** Use this option to specify the URL to the root folder of the content; for example, `http://<server name>/<content folder>`. Enter a path, not a specific page.

### Original Application Help

- **Application Help Type:** Use this option to specify the type of application help: Oracle Help, PeopleBooks, or Siebel Help.
- **Caption:** Use this option to specify a shorter, user-friendly name for the content outline you chose. This shorter name is used on the gateway tabs and link menu if you set up help integration.
- **URL:** Enter the URL to the location from where the Oracle application help or PeopleBooks can be launched. The URL is not needed for Siebel help.

### Any URL

- **Caption:** Use this option to specify a shorter, user-friendly name for the content outline you chose. This shorter name is used on the gateway tabs and link menu if you set up help integration.
- **URL:** Enter the URL to the page you want to launch.

## 2.1.2 Application Instances

The Application Instances section allows you to configure the applications and connect them with the sources you configured in the Sources section. The options vary, depending on whether the application supports SmartHelp only, SmartHelp and Help Integration, or help integration only. See *Implement In-Application Support* for a list of applications.

In the Type list, there are two non-specific application options listed: Browser Application and Custom Application. A browser application is exactly that - an application that runs in a browser window. This type of application is only enabled for SmartHelp. A custom application is one that you have created using the SDK. It may be available for either or both SmartHelp and Help Integration.

- **Type:** Choose the application type from the list.
- **Name:** Enter a user-friendly name for the application instance.
- **Application Namespace:** This option only appears if you selected Custom Application from the Type list and your application implements the In-Application Support SDK. This is the name created in the SDK when context-sensitivity was created. It should be in the form of `app.<namespace>`, for example `app.com.example.MyApplication`. See the *In-Application Support SDK* guide for more information.

### Options for SmartHelp-Enabled Applications

- **SmartHelp Sources:** This is list of sources that have been enabled for SmartHelp in the Sources section. Select the sources to be automatically searched by SmartHelp when the user is working with this application instance.
- **SmartHelp URL Rules:** Specify the URL of the server for the application. If there are multiple URLs, you can add new ones as needed. See SmartHelp URL Rules following this section for more information.

### Options for Applications that Support Help Integration

These options allow you to configure a gateway page that launches when a user clicks the Help link. You can also configure the gateway page to give the user access to additional resources, such as the original help for the target application, additional Player packages, or a URL to another web site. See application sections for application specific configuration options and configuration steps.

- **Default Player:** This is the Player that launches if you do not configure the gateway page. If you configure any kind of content segmentation, such as multi-language support, it only applies to this Default Player, not to Players launched from other tabs or links. It also specifies the source so that the configuration for this application is published when the outline referred to by the source is published.
- **Segment Players:** These options allow you to configure the help to launch the appropriate content if you have developed content in multiple languages, called segmentation. For each Segment Player, you choose the content from the list and then specify a language code. The language codes you use should match the ones used by the application. Some applications may have additional options.

**Note:** The list is searched in the order you specify, and the first matching Player is launched.

- **Help Integration Additional Tabs:** Allows you to create more tabs in the gateway page to display other Players, the original application help, or the target of a URL. Choose the source from the Tab 1 list. Use the add new link to add a tab, and a new Tab option appears in which you can choose the source for that tab.
- **Remember Active Tab:** If this option is selected, a cookie is placed on the user's system so that the gateway page launches with the tab that was active when the user last accessed it.
- **Help Integration Additional Links:** You can create links as well as tabs. Tabs are opened in an iFrame inside the gateway page, while links open a new window. Links are needed when a page does not allow being embedded in a page and must be opened in a standalone window. In the Link Menu Title field, enter the name of the link menu text to appear on the gateway page. From the Link 1 list, choose the source for the link. Use the add new link, and a new Link option appears in which you can choose the source for that link.

### 2.1.3 SmartHelp URL Rules

SmartHelp URL Rules allow you to define if this source is applicable for a specific page or pages. A URL matches the rule if there is at least one pattern which is matching and the last matching pattern in the list was "allow". Rules are evaluated in the order of definition. It is a good idea to define the more general patterns first, followed by the more specific patterns. You can also specify negative rules to indicate that the source is not available for the page or pages. The URLs that begin with "-" are excluded. Some things to know as you are defining rules:

- The URL pattern is case-insensitive.
- The rules support the asterisk (\*) wildcard, which matches an arbitrary number of characters. A trailing asterisk is always appended to the pattern by default if not present (that is we match the URL prefix).
- Specifying the protocol in the URL is optional. The protocol (http/https) can be anything if not explicitly set.
- It is recommended but not required that the URL pattern specifies at least the host or domain name.

Examples of patterns for rules:

```
http://*.sampledomain.com/* - any hosts in the domain
http://host/* - host used without domain
http://192.nn.nn.nn/* - host used with IP address, where nn.nn.nn are the specific numbers
in the address
http://host.mydomain.com/* - exact host name
http://host.mydomain.com:8080/* - host on specified port
host.mydomain.com - host only
*.mydomain.com - domain only
http://host.mydomain.com/app*/hr/ - sub-region of a specific application
```

Negative rules can be useful when the rules are setup generally to include more URLs, and then you want to exclude specific URLs.

```
Example:
host/app*
-host/app_one
```

You need to specify only these two rules instead of specifying the individual instances, such as:

```
host/app_two
host/app_three
host/app_four
```

## 2.1.4 Global Settings

There is a third section of the configuration document called Global Settings. It contains options for SmartHelp and Knowledge Center deployments.

### SmartHelp

These options only appear if at least one of the sources is enabled for SmartHelp.

- **Contact:** This field is optional. This information appears to the user on the SmartHelp subscriptions page. You can enter the name, email, or other contact information for the user if they have questions or problems.
- **Install Location:** This is the default installation location for SmartHelp. You can set the default for this in the Options dialog box. If a user does not have SmartHelp installed on their system, the Player suggests that the user install it from this location.
- **Export SmartHelp Installer:** This exports the SmartHelp Installer and its related files, as well as an html page that can be used as the target for users to download and install SmartHelp.

### Knowledge Center

This option only appears if at least one of the sources has a deployment type of Knowledge Center.

- **Content Root URL:** Enter the URL for the content root in Knowledge Center. This URL appears on the Server Properties page in Knowledge Center Manager, but you need to make a change to this URL to use it. When specifying the content root URL in the configuration, it should end with "Titles" instead of "Content" (which is what appears on the Server Properties page). You need to specify the Titles folder instead of the Content folder because the GUID based aliases in Knowledge Center are handled in the Titles folder rather than the Content folder. For example, if the Server Properties page displays `http://KCenter-host/KCenter/Content`, you would need to enter `http://KCenter-host/KCenter/Titles` in the configuration.

In most cases, this field is optional. When the configuration must be copied to the

application server and the content is deployed on the Knowledge Center server, this field is mandatory.

## 2.2 Integrate Help in Target Applications

If help integration is available for a target application, there is some configuration that must be done on the application server. This section outlines the configuration for each target application.

### 2.2.1 Agile CNM

Agile CNM can be configured to launch context-sensitive help through the Help button. When the user clicks the Help button, the Player help launches directly or a gateway page appears allowing the user to choose between the Player help and the Agile CNM help.

A System Administrator can configure the Agile CNM application to launch the context-sensitive Player help from the Administration link inside the application.

 To configure Agile CNM:

1. Log in to the Agile CNM application.
2. Click the **Administration** link.
3. Click the **System Settings** link.
4. Click in the **Online Help URL** field.
5. Change the URL to point to the agilecnm\_gateway.html file inside the Player Package.

Example: `http://<server>/<path>/agilecnm/hemi/agilecnm_gateway.html`

6. Click **Save**.

### 2.2.2 Agile PLM

Agile PLM can be configured to launch context-sensitive help through the Help button. When the user clicks the Help button, the Player help launches directly or a gateway page appears allowing the user to choose between the Player help and the Agile PLM help.

You configure the Agile PLM application to launch the context-sensitive Player help directly from the Help button by using the Java client interface for administration.

**Note:** For customers using Agile Pharma inside version 9.3.1, a server side configuration is necessary to configure the help link to launch Player content. The file name is CFMConfig.xml and is located under <Agile\_Home>\AgilePharma\config. In this xml file, locate the <AgileHelpUrl> variable and configure it to point to the Player Package. Below is an example:

```
<AgileHelpUrl>http://<server>/<path>/agile/hemi/agile_gateway.html</AgileHelpUrl>
```

 To configure Agile PLM:

1. Log in to the Agile Java client application.
2. Click the **Admin** tab.
3. Expand the **Server Settings** item in the tree.
4. Double-click the **Locations** item in the tree.

5. Click the **Online Help Manuals URL** field.
6. Enter the server and virtual directory where the published Player content is located, for example:  
  
http://<server>/<path>/agile/hemi/agile\_gateway.html
7. Click the **Close** button.
8. Click the **Yes** button.

### 2.2.3 JD Edwards EnterpriseOne

In the P98MOQUE file, update the Helps path to point to the **pste1\_gateway.html** file in the **/psentone/hemi** folder. This path should be a URL path based on your virtual directory setup.

For example:

http://<server>/<path>/psentone/hemi/pste1\_gateway.html

It is a good idea to make a note of the original PeopleBooks help URL in case you want to use it later.

Starting with Tools 9.14, add a new MOQ record via P98MOQUE using the Queue Name "UPK" and a Type of "12".

**Note:** While setting up the Media Object Queues you may use Help Content as the Queue name and point to **pste1\_gateway.html** file under `..\psentone\hemi` in the published content folder as the On-Line and Off-Line Queue paths.

### 2.2.4 JD Edwards World

The instructions that follow are for the JWalk Java client interface. A button to launch Player content appears on the program menus; no configuration is necessary for this button to appear. However, it must be configured to point to the Player help content through entries in two text files.

To launch the context-sensitive help content, the JD Edwards World Web Enablement administrator needs to set entries appropriately in the WV9100.JVM and DYNBLD9100.JVM text files. These files are located within the Deployment area of the JWalk server or client.

- For the iSeries-i5 Installation:  
www/<HTTP server>, such as `apachedft/htdocs/JWALK/JWALKAPP/A9100APP`
- For the Windows NT-2000-2003 Server Installation:  
`C:\inetpub\wwwroot\JWALKAPP\A9100APP` or  
`C:\Program Files\Apache Software Foundation\Apache2.2\htdocs\JWALKAPP\A9100APP`

The Text File entries to be updated are:

- UPKVIEWI: Set this to Y to display the Context aware icon on the program menus.
- UPKVIEWWH: Set this to Y to display the View Content Option from the Help Drop Down menu.
- UPKHELP: This displays text when hovering over the Context aware icon.
- UPKHELPOPT: This displays text for the option on the Help Drop Down menu.

- UPKPath: This should be set to the path of the content location. For example:

`http://<server>/<path>/jdedworld/hemi/jdedworld_gateway.html?CTXEX=`

If you place the help content on the Windows server supporting the JWalk client interface, no additional configuration is necessary. If the help content is on a non-Windows server, you need to configure the `odcustomurl.js` file.

## 2.2.5 Oracle E-Business Suite

To implement Help Integration for Oracle E-Business Suite, you must install and compile two library files that are delivered with the Developer installation. To complete the integration, modify the `HELP_WEB_AGENT` profile on the Oracle server to point to the Player content. This causes the Player interface to launch directly from the Oracle Help menu.

### Implement Context-Sensitive Help Integration

If you want to implement context-sensitive help for Oracle E-Business Suite applications, the correct Context IDs of the objects in Oracle must be captured while the content is recorded. To enable this in Oracle E-Business Suite 12.1.1 or earlier, you must deploy or modify the custom library (`CUSTOM.pll`) on the Oracle server you use to record the content. This must be done before you begin to record content. To enable this in Oracle E-Business Suite 12.1.2 or later, you can add an entry in the System Profile form.

### Enable Context Recognition in Oracle E-Business Suite 12.1.2 or Later

In Oracle E-Business Suite 12.1.2 or later, you add a profile in the System Profile form.



To enable context recognition in Oracle E-Business Suite 12.1.2 or later:

1. Launch the Oracle E-Business Suite application.
2. Click the **System Administrator** link.
3. Click the **Profile>System** link to launch the System Profile form.
4. Enter **%UPK%** in the **Profile** field.
5. Click the **Site** field and change the value to **Yes** to enable context recognition. This change is available to all users in the E-Business Suite application.
6. On the **File** menu, click **Save**.
7. On the **File** menu, click **Exit Oracle Applications** and click **OK**.

### Enable Context Recognition in Oracle E-Business Suite 12.1.1 or Earlier

To enable context recognition, you must either deploy a custom library or modify an existing one, and then modify the `HELP_WEB_AGENT` profile. The custom library is required for recording content only. It is not necessary for deployment of context-sensitive content from Oracle E-Business Suite. If you use the different systems for development (content creation) and production (deployment), then the custom library configuration is not necessary in the production environment. If you use the same system for development and production, then custom library only needs to be installed while the content is being recorded.

### Check Existing Custom Library Configuration

The `.pll` delivered with the Developer is written with `SPECIAL7` as the default value. This default value is a suggestion. You can use anything between 1 and 15. If you have not created any Oracle specific applications that use the `SPECIAL` event, you can use the default. If you have created Oracle-specific applications that do use the `SPECIAL` event, the value of 7 may be taken, and you need to find another suitable unused value between 1 and 15.



You can use the following command lines to find an unused value instead of editing and recompiling the custom.pll file repeatedly:

```
cd $AU_TOP/forms/US; grep -i APP_SPECIAL.ENABLE `find . -name "*.fmb" -print` | grep SPECIAL7 | grep -i PROPERTY_ON
cd $AU_TOP/resource; grep -i APP_SPECIAL.ENABLE `find . -name "*.fmb" -print` | grep SPECIAL7 | grep -i PROPERTY_ON
```

If you receive a result that looks like the statement below, the value is already being used.

```
./CSCCCRC.fmb:app_special.enable('SPECIAL7', PROPERTY_ON);
```

### Deploy a Custom Library

Use the following steps if you have not deployed a custom Library on your Oracle Applications server.

 To deploy a custom library:

1. Back up your existing **CUSTOM.pll** to **CUSTOM.pll.orig**.
2. Locate the **ODPNCustomPLL.zip** file in the ORACLE folder where the Developer is installed and extract the **CUSTOM.pll** and **ODPN.pll files**. Copy them to the \$AU\_TOP/resource folder on the Oracle Applications server.

**Note:** \$AU\_TOP is defined as a variable and references /oracle/VIS/apps/apps\_st/appl/au in both a Unix and Windows operating system.

3. Ensure that no one is currently using Oracle Applications (Web Forms). Shut down the Oracle Forms Server service if you are running 11i.

**Note:** It is not necessary to shut down any service if you are running R12.

4. While in the \$AU\_TOP/resource, compile the **ODPN.pll** and **CUSTOM.pll** library files using the command for your specific EBS version:

Oracle 11.5.10 server:

```
ifcmp60 module=ODPN.pll module_type=LIBRARY userid=apps/apps@<instance>
compile_all=yes
```

```
ifcmp60 module=CUSTOM.pll module_type=LIBRARY userid=apps/apps@<instance>
compile_all=yes
```

For Oracle E-Business Suite R12:

```
frmcmp module=ODPN.pll module_type=library userid=apps/apps@<instance>
compile_all=yes
```

```
frmcmp module=CUSTOM.pll module_type=library userid=apps/apps@<instance>
compile_all=yes
```

**Note:** Replace the database connect string to reflect your instance.

**Note:** Shutting down the Forms server is not necessary for Oracle E-Business Suite R12.

### Modify an Existing Custom Library

Use the following steps if you have custom logic in your custom library (CUSTOM.pll) that you do not want to overwrite. You must place a line of code in the custom library that will call out to a new library (ODPN.pll). After doing this, you will only need to recompile your existing CUSTOM.pll if you receive new versions of ODPN.pll with software upgrades.

 To modify a custom library:

1. Back up your existing **CUSTOM.pll** to **CUSTOM.pll.orig**.
2. Copy the **CUSTOM.pll** from the \$AU\_TOP/resource folder on the Oracle Applications server to a client machine that has Oracle Forms Builder installed.
3. Copy the **APPCORE2.pll** from \$AU\_TOP/resource folder on the Oracle Applications server to a client machine that has Oracle Forms Builder installed. This should be the same folder you used for the previous step.
4. Locate the **ODPNCustomPLL.zip** file in the ORACLE folder where the Developer is installed and extract the **ODPN.pll** file. Copy it to the client machine into same folder as previous file copies.
5. Open **CUSTOM.pll** using Oracle Forms Builder and attach **ODPN.pll**. Place this file in the same folder on the client side as your CUSTOM.pll prior to the attachment.
6. Answer **Yes** when asked to remove directory path.
7. Add the following code to the Event procedure:

```
gkod_event (event_name, 'SPECIAL7');
```

**Note:** You may use any number between 1 and 15 in the SPECIAL command as long as there are no conflicts. See Check Existing Custom Library Configuration for more details. Beginning with Oracle EBS 12.1, the SPECIAL command can be replaced with the MENUX command where X is a number between 1 and 15.

8. Ensure that no one is currently using Oracle Applications (Web Forms). Shut down the Oracle Forms Server service.
9. Copy the **CUSTOM.pll** and **ODPN.pll** files from the client to the \$AU\_TOP/resource folder on the Oracle Applications server.
10. Compile both the **ODPN.pll** and the **CUSTOM.pll** files using steps 5 and 6 in the previous section.

### Modify the HELP\_WEB\_AGENT Profile

You must modify the HELP\_WEB\_AGENT profile in Oracle to point to the oracle\_gateway.html in the Player content deployed on the server.

**Note:** It is a good idea to make a note of the original help URL in case you want to use it later.

For Oracle E-Business Suite 11i , the URL consists of two parts: the path for the oracle\_gateway.html file located in the \oracle\hemi folder in the Player content, plus the path of the default dbc file for the Oracle server.

Following is an example for 11i:

```
URL=http://<server>:<port>/oracle/hemi/oracle_gateway.html?dbc=d:\oracle\o11iappl\wnd\11.5.0\secure\<server name>.dbc
```

Following is an example for R12:

```
URL=http://<server>:<port>/oracle/hemi/oracle_gateway.html
```

 To modify the HELP\_WEB\_AGENT profile in Oracle E-Business Suite:


1. Sign on to the Oracle EBS Application via the web browser as an administrator.
2. Click the **System Administrator** link and locate the **System** Profile.
3. When the java form launches, enter **APPLICATIONS\_HELP%** in the **Profile** field and click **Find**.
4. Enter or edit the URL with the path to the oracle\_gateway.html.
 

**Note:** For Oracle 11.5.10, include the location of the .dbc file in the URL string. Once you have completed your changes, stop and restart the Oracle Forms service.
5. For the profile change to take effect in the current session, exit from the Oracle application and sign in again.
6. Click **Help** in Oracle, and the Player launches.

### 2.2.6 Oracle (Hyperion) EPM

Player help can be launched through the Help menu for supported Oracle (Hyperion) EPM applications. For the Calculation Manager, EPM Architect, Financials Management, and Planning applications, the help is context-sensitive. For the Smart View and Financial Reporting Studio applications, the help is not context-sensitive.

The help launch for all supported applications is controlled through an option in the Hyperion Workspace Server Settings. When you enter a URL in the field, the Oracle User Productivity Kit option appears on the Help menu automatically. Note that if the field is blank, the Oracle User Productivity Kit may still appear as an option for certain applications such as Financials Reporting Studio, but the option is grayed out and unavailable.

 To configure the help menu:

1. Launch and log in to the Hyperion Workspace.
2. On the **Navigate** menu, choose **Administer**.
3. Click the **Workspace Server Settings** menu.
4. In the **URL to User Productivity Kit** field, enter the URL to the content location. The URL should consist of the web server name and the virtual directory where the content is located. For example, http://<server>/<path>. You do not need to append any further information.
5. Click **OK** twice to close the Workspace Server Settings dialog box and save your settings.
6. Log off and on to the Hyperion Workspace to apply the URL change.


### 2.2.7 Oracle Fusion Applications

Users can take advantage of Oracle User Productivity Kit (UPK) content while working with the Oracle Fusion Applications. To make Oracle UPK content available for users, you need to enable and configure the UPK link under the Help menu of Oracle Fusion Applications (11g Release 7 and higher).

To perform this task, you must have the role of a System Administrator and have relevant privileges on the environment where you want to enable and configure the UPK link.

## Registering Oracle UPK as an Enterprise Application

The Oracle User Productivity Kit must be registered in Fusion before content can be recorded. To complete the configuration, the System Administrator must have security access to use Oracle Functional Setup Manager.

 To register UPK as an enterprise application:

1. On the Oracle Fusion Applications Home page, select **Navigator, Tools, Setup and Maintenance** to access the Setup and Maintenance work area.
2. In the Setup and Maintenance work area, under Topology Objects, click the **Manage Enterprise Applications** link.
3. Click the **Register Enterprise Applications** link.
4. Click **Add** to register Oracle UPK to the Oracle Fusion applications.
5. In the Basic Information section, define your **Enterprise Environment, Enterprise Application** and the **Name** of the registration.
6. Select your Enterprise Environment from the list.
7. Use the **Search** link in the list to search for your Enterprise Application.
8. In the dialog box, enter or select **Oracle**, and click **Search**.
9. In the Search results, select **Oracle User Productivity Kit** from the list and click **OK**.
10. In the Basic Information section, in the **Name** field, enter **Oracle User Productivity Kit** as the registration name.
11. In the Server Details section, configure the Server Protocol that you are using to launch your content.  
**Note:** The Player supports both http and https protocols.
12. In the **External Host** field, enter the full DNS name of the server host.  
**Example:** content.server.com
13. In the **External Server Port** field, enter the appropriate port for either http or https.  
**Note:** The default port for http is 80. The default port for https is 443.
14. In the **Context Root** field, enter the directory location where the Player is to be deployed.
15. Click **Save** and then click **Close**.

After you complete the preceding configuration steps, check the Help menu on the Oracle Fusion Applications to verify that the "Oracle User Productivity Kit" link is now available as a menu item.

You may upload content in the specified location (part of the UPK Registration in Fusion FSM) and check to validate that the player launches with context sensitivity.

## 2.2.8 Oracle Knowledge Center

To implement help integration for Oracle Knowledge Center, replace the pre-existing help for each language, as desired. The help systems are located in a Help folder within the location where the Knowledge Center is installed. In a default installation, the location is:

C:\Program Files\User Productivity Kit\Knowledge Center\Web Server\KCenter\Documentation

Within the Help folder, there is a folder for each language, designated by a two-letter code, for example, EN for English and DE for German. Within each language folder, there are three folders, each containing one of the help systems for the Knowledge Center:

- KCenter: The help for the main user interface.
- Manager: The help for the Manager application, which launches when a user clicks the Manager link in the Navigation pane.
- Reports: The help for the Reports application, which launches when a user clicks the Reports link in the Navigation pane.

Each folder contains a Player package. Copy the Player package with your customized help into the appropriate folder. For example, to replace the default help with customized help for the Knowledge Center main interface in English, go to this folder:

C:\Program Files\  
<brand>\Knowledge Center\Web  
Server\KCenter\Documentation\EN\Help\KCenter

**Note:** It is highly recommended that you zip the existing Player package as a backup before you copy the customized package.

### 2.2.9 PeopleSoft

The Player supports two methods of configuration for the Web Profile helpurl configuration, local or hosted PeopleBooks. To properly record context IDs in a PeopleSoft application, you must set the HelpURL field inside your active Web profile configuration to point to the pst8\_gateway.html file, and append the context parameter string that makes up the URL.

Whether you choose to use a local version of PeopleBooks or a version hosted by Oracle, you must configure the HelpURL field to point to the published PlayerPackage and use the appropriate query string of parameters based upon your choice.

#### Local PeopleBooks configuration:

http://<server>:<port>/<path>/pst8/hemi/pst8\_gateway.html?ContextID=%CONTEXT\_ID%&LangCD=%LANG\_CD%

#### Hosted PeopleBooks/Universal Linking configuration:

http://<server>:<port>/<path>/pst8/hemi/pst8\_gateway.html?id=%CONTEXT\_ID%&ctx=<first value>&ctx=<second value>&LangCD=%LANG\_CD%


**Note:** For additional information about hosted PeopleBooks, see the PeopleBooks Online Library at:

[http://docs.oracle.com/cd/E17566\\_01/epm91pbr0/eng/psbooks/psft\\_homepage.htm](http://docs.oracle.com/cd/E17566_01/epm91pbr0/eng/psbooks/psft_homepage.htm)

Use an IAS Configuration document in the Developer to configure a link in the Player gateway page for PeopleBooks; for example, <http://www.oracle.com/pls/topic/lookup>.

### 2.2.10 Primavera Contracts Management

The Primavera Contracts Management application can be configured to display a User Productivity Kit link in the page menu. To configure this feature, the system administrator must use the Primavera Administrator tool.

 To configure the Primavera Contracts Management application to display the User Productivity Kit link:

1. Launch the Primavera Administrator tool.
2. Expand the User Productivity Kit folder.
3. Change the **Enable User Productivity Kit** setting to **true**.
4. Enter the server and directory location on your web server in the **User Productivity Kit URL** setting.
5. Save the settings.
6. Restart the Weblogic web services.

Once the web server restarts, the new link appears in the page menu.

### 2.2.11 Primavera P6

Primavera P6 can be configured to launch context-sensitive help through the Tutorials link in the Help menu. When the user clicks the Tutorials link, the Player help launches. You can create your own custom content and point the Tutorials link to it.

 To configure the Tutorials link to launch your custom content:

1. Launch the **Administrator** tool.
2. Expand the **Primavera P6 Configuration** folder in the **Custom** folder.
3. Expand the **Application** folder and then the **Tutorials** folder.
4. Edit the **Enable Tutorials** field and change it to true, if necessary.
5. Edit the **Tutorials URL** field to point to the custom content location. You only need to specify the server and the virtual directory; for example, `http://<server>/<path>`.
6. Click **Save Changes**.

### 2.2.12 SAP GUI for Windows and SAP GUI for HTML

To integrate published help content with SAP GUI clients, you must perform the following steps:

#### Server Setup

These steps should only be performed once.

- Register an object in SAP Service Marketplace.
- Copy the transport files to the SAP server.
- Import the transport files into the SAP system.
- Customize the SAP Help menu.
- Edit ABAP code to customize the “help\_start” function in SAP to launch the Player.
- Translate the Help menu, although this step is optional.

## Server Configuration

- Configure the Gateway URL. This step requires configuring the URLs to point the content for SAP.

## Content Configuration

- Configure content segmentation.

For the installation, an SAP Service Marketplace user with administration rights is required. In the target SAP system, a user with developer rights, registered as a developer, is required.

### Register an Object in the SAP Service Marketplace System

An SAP Administrator or someone who has administrative rights for the target SAP installation in the SAP Marketplace must perform this procedure.

Register the following object: "PgmID:R3TR, Object:FUGR, ObjectName:SHL2" and make a note of the access key.

### Copy the Transport Files to the SAP Server

The transport file contains two files, Kxxxxxx.nnn and Rxxxxxx.nnn, where x and n will vary, depending on the version of the Developer that the transport is from. These files must be copied to the SAP server. They are contained in a file called HEMITransport.zip and are located in the front folder in the Developer installation.

**Note:** You will need an unzip utility such as WinZip to unzip the files.

The details for the next steps are in the sections that follow. The procedures may vary, depending on your SAP version. Procedures ECC6 are provided as examples.


#### 2.2.12.1 Import the Transport Files



The transport files that were copied to the SAP server need to be imported into the SAP system. A Basis administrator should perform this step.





All objects in this transport are located in the registered development namespace /ORAUPK/. This development namespace ensures that no naming conflicts can arise in your SAP system because of the transport.

**Note:** If you want to check the import logs of the transport, select the Goto menu and then the Import History command. A return code 4 (Warning) and below is acceptable.

The previous version of the ORAUPK transport was GKOD. If it was never installed on the SAP server, follow the steps below. If the GKOD transport was installed on the SAP server, use the steps below, paying special attention to the notes.

 To import the transport files to an SAP version ECC6 server:


1. Log on to SAP as a Basis administrator.
2. In the Transaction Code field, enter **stms**.
3. Click  Enter.
4. Click  Import overview.
5. Double-click the import queue of the target system.
6. On the **Extras** menu, point to **Other requests** and choose **Add**.





7. In the Transp. request field, enter nnnKxxxxx, where nnn and xxxxx match the name of the transport file that was unzipped.
8. Click  (Continue).
9. Click **Yes**.
10. On the **Queue** menu, choose **Close**.
11. Select the added transport and click **Import Request**.
12. In the Target client field, enter the number of the appropriate client.
13. Click  (Continue).
14. Click **Yes**.
15. Click  (Refresh).
16. Click  (Exit) twice.

### 2.2.12.2 Customize the SAP Help Menu

Once the transports have been imported into the SAP system, you must customize the SAP System Help menu to launch Player content by creating a menu item with 'Code' ZOND and 'Functional Type' H.

**Note:** If GKOD, the previous version of the transport, was not installed on the SAP server, skip the steps as indicated below.

 To customize the SAP Help menu on a version ECC6 server:

1. Log on to SAP as a user with developer rights.
2. In the Transaction Code field, enter **se41**.
3. Click  (Enter).
4. In the Program field, enter **MENUSYST**.
5. In the Status field, enter **MEN**.
6. Click  **Change**.
7. Click  (Continue) twice to respond to messages in the Menu Painter: Initial Screen box.  
**Note:** If the GKOD version of the transport was installed on the server, click Continue three times.
8. Click **Maint. in orig. lang**.  
**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.
9. Click  (Continue).



**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.

10. Click  next to **Menu bar**.

11. Double-click the **Hilfe** entry in the list.

12. Click the **ERHI** entry in the list.

**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.

13. On the **Edit** menu, point to **Insert** and choose **Separator line**.

14. Click  (Continue).

15. On the **Edit** menu, point to **Insert** and choose **Entry**.

16. In the Code field, enter **ZOND**.

17. In the Text field, enter the text that you want to use for the menu entry that launches the Player.

**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.

18. Double-click the Code field in which you entered ZOND.

19. In the Functional type field, enter **H**.

**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.

20. Click  (Continue).

21. On the **Extras** menu, choose **Active functions in multiple statuses**.

22. Click  (Continue).

23. Select all of the options in the Status column.

**Note:** Skip this step if the GKOD version of the transport was NOT installed on the server.

24. Click  **Copy**.

25. Click  (Activate).

26. Click  (Create request).

**Note:** Skip steps 26 - 29 if the GKOD version of the transport was NOT installed on the server.

27. In the Short description field, enter the desired text.

28. Click  (save).

29. Click  (Continue).






30. Click  twice.

### 2.2.12.3 Customize the *HELP\_START* Function







In this process, you must edit code to customize the "help\_start" function in SAP. This function launches SAP Help menu commands and must be modified to launch the Player with special parameters.

**Note:** The status message "Object FUNC\_HELP\_START is part of the Basis interface; further development not allowed" may appear. This message is not an error, and you should continue with the procedure.

 To Customize the *HELP\_START* function on an ECC6 server:

1. Log in to SAP with developer rights.
2. In the Transaction Code field, enter **se37**.
3. Click  (Enter).
4. In the Function module field, enter **HELP\_START**.
5. Click  **Change**.
6. Enter your user access key and the access key for the object that was registered in the SAP Service Marketplace system.
7. Click **Continue**.
8. Click  (Continue).
9. Click **Maint. in orig. lang.**
10. Click  (Find/Replace).
11. In the Find what field, enter **when 'GLOS'**.
12. Click **Find Next**.
13. Click **Cancel**.
14. Click in the workspace to position the insertion point before the when 'GLOS' statement.
15. Click  **Insert**.
16. Enter **UPK Include** and press **ENTER** twice to create two blank lines under the \*UPK Include statement.
17. Click the first blank line you just created and enter **include /ORAUPK/Y\_START\_UPK.**










**Note:** The period at the end must be included in the statement.

18. Click  (Check).
19. Click  (Activate).
20. Click  (Continue) twice.
21. Click  (Exit).
22. Click  (Activate).
23. Click  (Exit).

#### 2.2.12.4 Translate the Help Menu

You can translate the SAP menu items into different local languages. The Help menu will then appear in the language that the user specified while logging in to the SAP GUI.

 To translate the Help menu on a version ECC6 server:

1. Log in to SAP as a user with developer rights.
2. In the Transaction Code field, enter **se41**.
3. Click  (Enter).
4. In the Program field, enter **MENUSYST**.
5. In the Status field, enter **MEN**.
6. On the **Goto** menu, choose **Translation**.
7. Click the Target Language field and enter the language code.
8. Click  (Translate).
9. Click  (Find Text).
10. In the **Find** field, enter the text that you used for the menu entry that launches the Player.
11. Click  (Copy).
12. Click  (Sequential).
13. Enter the menu text in the target language.
14. Click  (Save).
15. Click  (Exit).
16. Click  (Back).
17. Click  (Exit).

### 2.2.12.5 Configure the Gateway URL


In this process, you configure the help menu entry you created to point to your deployed content. The content must be installed on a Web server and the URLs, which can be used to access the content, must be entered into the system.

You can set up the URL to call Player content in any client, or you can set up client-dependent base URLs. When you enter a Default Base URL and select the Enabled option, the entry is used to call Player content in any client by default. If you save the entry with the Enabled option deselected, the Default Base URL is not used in the system. If you do not want to use the Default Base URL, you must still enter an empty string in the table. If the entry is not defined, you receive an error message.

You can create client dependent base URLs as well. If there is no entry in the Client Dependent Base URL table for a specific client, the Default Base URL is used for that client. When the Enabled option is selected for a client, then the URL for the client is taken as the Base URL. When the Enabled option is deselected for a client, then Player content is deactivated in the client, and users receive an error message when calling Player content.





You must log in to the SAP system as a user with developer rights. Since the table you use is defined as client independent, you can log in to any client to change the entries.

 To configure the Gateway URL on a version ECC6 server:

1. Log in to SAP as a user with developer rights.
2. In the Transaction Code field, enter **/n/ORAUWK/SS**.
3. Click  (Enter).
4. Click **Default Base URL**.
5. In the Default Base URL field, enter the URL to the sap\_gateway.html page in the content for SAP on the web server. This must be a fully-qualified URL containing the sap\_gateway.html page.

**Note:** The sap\_gateway.html page is located in the front\hemi folder within the Player package.




**Example:** //<server>/Player/front/hemi/sap\_gateway.html.

6. Click the **Enabled** option.
7. Click  (Save).
8. Click  (Continue).
9. Click **Client Dependent Base URL**.
10. Click  **Maintain**.
11. Click  (Continue).
12. Click **New Entries**.

**Note:** The following steps are for adding a URL pointing to the content that is client-dependent. These steps configure the SAP system to launch content from a specified URL depending on the client number in which the user logged in. You can use any valid SAP client number for these steps. You can also use multiple entries for multiple

clients.

13. In the Client field in the first row of the table, enter a client number.
14. Click **Enabled**.
15. In the Base URL field in the first row of the table, enter the path to the SAP\_gateway.html page in the content for SAP on the web server.
 

**Note:** This URL can be different than the one above.
16. Click  (Save).
17. Click  (Exit) twice.
18. Click **Check Configuration**.
19. Click  (Exit).

### 2.2.12.6 Configure Content Segmentation

For SAP, you can add parameters in the Application Instance Configuration to segment the content by GUI Type and SAP User Parameter in addition to language.

 To segment by GUI type and SAP User Parameter:


1. In the Developer, create an IAS Configuration document.
2. In the Sources section, click **Select outline** and select the outline with the content you created for SAP. In the **Caption** field, enter a title to show on the tab or link.
3. In the Application Instances section, in the **Type** list choose **SAP Business Suite** and select the **Help Integration** option.
4. Select the source you defined in step 2 as the Default Player.
5. To segment the Players, click the **add new** link under Segment Players.
6. To segment by language, enter the language code used by SAP.
7. To segment by GUI Type, enter S for SAP GUI for Windows, W for SAP GUI for HTML, or J for SAP GUI for Java in the **Segmentation Parameter** field.
8. To segment by User Parameter, enter the User Parameter in the **Segmentation Parameter** field.
 

**Note:** To use this parameter for segmentation, the parameter /ORAUPK/Y\_ROLE must be created in each SAP user's Master Record (transaction SU01). The values in the Master Records and the values in the Segmentation Parameter field must match for the appropriate content to be returned.
9. Repeat steps 5 through 8 for each language, GUI Type, and SAP User Parameter.
10. Save the IAS configuration document.

### 2.2.13 SAP NetWeaver Portal

This section describes how to integrate content into the Help menu of your SAP NetWeaver Portal. The portal administrator or basis administrator needs to perform these steps.


Because of the highly configurable nature of the SAP NetWeaver Portal, the steps that you must perform may be different than the steps presented here. These instructions assume the portal default framework is in use. If another framework is in use, or if the default framework has been substantially modified, these instructions may not work.

 To display this content in a context-sensitive manner:

1. Deploy the published Player to a web server in the same domain as the SAP NetWeaver Portal or copy the Application Instance Configuration files to the same server on which the SAP NetWeaver Portal is deployed. You get the Application Instance Configuration files by creating an IAS Configuration document in Developer and selecting Export Instance Configuration. See *Domain Relaxing* in this section for more information.
2. Configure the Portal Help Link.

### Deploy the Configuration on the NetWeaver Portal Server

If the content is published to a server in the same domain as the portal and your NetWeaver Portal server is using domain relaxing, it is not necessary to copy the Application Instance Configuration files to the NetWeaver Portal server. This is only needed if the Player is deployed in a different domain.

 To create and export an IAS Configuration document for SAP NetWeaver Portal in the Developer:

1. In the Developer, create an IAS Configuration document.
2. In the Sources section, click **Select outline** and select the outline with the content you created for SAP NetWeaver. In the **Caption** field, enter a title to show on the tab or link.  
  
**Note:** If you choose Web Server as the deployment type, you must specify the URL where you deploy the content. If you choose Knowledge Center as the deployment type, the Content Root URL must be set.
3. In the Application Instances section, in the **Type** list choose **SAP NetWeaver Portal** and select the **Help Integration** option
4. Select the source you defined in step 2 as the Default Player.
5. Optional: If you are configuring help integration for more than one language, click the **add new** link under Segment Players for each language and specify the appropriate language code.
6. Save the IAS Configuration document.
7. Click **Export Instance Configuration** in the Application Instances section. The files that you need are in the exported folder.

The contents of the sapnwep/hemi folder in the exported Application Instance Configuration must be placed at a location that meets the following requirements:

- It is accessible by HTTP or HTTPS protocols.
- It is on the NetWeaver Portal server, or it is in the same internet domain as your NetWeaver Portal server and your server is using domain relaxing.

For example, if the URL to access your portal is

<http://netweaverportal.example.com:50000/irj/portal>

then the location where you place the gateway and configuration files may be something like:

<http://help.example.com:50000/sapnwep/hemi/>

### Domain Relaxing

Domain relaxing is a method of enabling web-based scripting between components that the web browser would normally prevent due to cross-domain scripting security concerns. In some cases, however, this scripting enables desired functionality. Domain relaxing is designed to allow cross-domain scripting between components served from similar root domains (for example, [content.example.com](http://content.example.com) and [server2.example.com](http://server2.example.com)). Help Menu Integration for SAP NetWeaver Enterprise Portal uses the same domain relaxing technique that SAP uses.

Additional documentation can be found at:

[http://help.sap.com/saphelp\\_nw70/helpdata/en/28/7c383f717b5f03e10000000a114084/content.htm](http://help.sap.com/saphelp_nw70/helpdata/en/28/7c383f717b5f03e10000000a114084/content.htm).

If you are using domain relaxing, the Player and the Application Instance Configuration files do not need to be separated. No IAS Configuration is necessary unless segmentation is needed. You can simply publish and deploy the content, and the gateway files are located in the `sapnwep/hemi` folder.


### Configure the Portal Help Link

The final task in setting up integrated context-sensitive Help for your SAP NetWeaver Enterprise Portal is to configure the portal's Help link. The following procedures contain the configuration steps for Portal v.7.0 and v.7.4.

 For NWEF 7.0, a user with Administration rights can perform the following steps:

1. Log into the SAP NetWeaver Enterprise Portal.
2. Click the Content Administration tab.
3. In the Portal Content area, expand the Portal Content tree item.
4. Open the Portal Users folder.
5. Open the Standard Portal Users folder.
6. Double-click the Default Frameworks Page to open it.
7. Select the checkbox for the Masthead iView Page Content item.
8. Click the **Edit** button.
9. In the Property Category drop-down list select **Navigation**.
10. In the URL of the Help Link field, enter the URL of the `sapnwep_gateway.html` file. For example, the URL you enter may look similar to:
 

[http://help.example.com:50000/sapnwep/hemi/sapnwep\\_gateway.html](http://help.example.com:50000/sapnwep/hemi/sapnwep_gateway.html)
11. Save your changes.

 For NWEF 7.4, a user with Administration rights can perform the following steps:

1. Log into the SAP NetWeaver Enterprise Portal.

2. Click the Content Administration tab.
3. Click the Portal Display tab.
4. Click the Framework Page Configuration hyperlink.
5. Select the Framework page name list box.
6. From the list, select **Ajax Framework Page (Ajax Portal Desktop)**.
7. In the URL of the Help Link field, enter the URL of the sapnwep\_gateway.html file. For example, the URL you enter may look similar to:  
  
`http://help.example.com:50000/sapnwep/hemi/sapnwep_gateway.html`
8. Save your changes.

### 2.2.14 Siebel CRM (On Premise High Interactivity and Open UI Applications) with Server Config

**Note:** This method was deprecated and will be removed in the next major release. The preferred solution is Siebel CRM (On Premise High Interactivity and Open UI Application) with HINT Agent. See the next section for more information on this method.

Content is launched directly from the Contents link from the Siebel Help menu. Siebel Help can also be made available on the tabbed gateway as a separate tab or link. This method only works for Internet Explorer.

Prerequisites for help integration in Siebel:

1. Siebel content created in the Developer.
2. A web server to deploy the published content. The content must be published to the Player format from the Developer.
3. File level access on the Siebel server to configure the Help menu. The following MIME type must be added for the HTTP server on which the Siebel application is hosted. Some web servers have this MIME type configured by default.

`text/x-component`

**Note:** In Internet Explorer 9 and 10, the Siebel server URL must be run in compatibility mode to display the content in the Player.

Refer to the Technical Specifications for a list of supported versions of Siebel server.

 To set up help integration on the Siebel web server:

1. In the Developer, create an IAS Configuration document.
2. In the Sources section, click **Select outline** and select the outline with the content you created for Siebel. In the **Caption** field, enter a title to show on the tab or link.

**Note:** If you choose Web Server as the deployment type, you must specify the URL where you deploy the content. If you choose Knowledge Center as the deployment type, the Content Root URL must be set.

3. In the Application Instances section, in the **Type** list choose **Siebel CRM (On Premise) with Server Config** and select the **Help Integration** option.



4. Select the source you defined in step 2 as the Default Player.
5. Optional: If you are configuring help integration for more than one language, click the **add new** link under Segment Players for each language and specify the appropriate language code.
6. Optional: If you want to make the original Siebel Help available through help integration, go to the procedure below and complete those steps before exporting the configuration.
7. Save the IAS configuration document.
8. Click **Export Instance Configuration** in the Application Instances section. The files that you need are in the exported folder.

**Note:** Export the files to an empty folder to avoid mixing with older files. If there was a previous version of help integration configured for the Siebel server, those files should be removed from the server.

9. Go to the Siebel application server and find the `.../SWEApp/Public/` (installation) folder.
10. Find an application language on the Siebel server for which the configuration must be done. Locate the folder with the content you recorded for that language. In the Help folder within the content, find and open the `Siebhhelp.css` file and edit it as described in the next step.
11. Add the `behavior:url` command to the body section as indicated below:

```
body {
margin-top: 4px;
margin-bottom: 4px;
font-family: Verdana, Geneva, Arial, Helvetica, sans-serif;
font-size: 8pt;
behavior:url(../hemi/siebel7.htc);
}
```

12. Save the `Siebhhelp.css` file.
13. Locate the **/hemi** folder in the location to which you exported the configuration.
14. Copy the **/hemi** folder and paste it in the language folder on the Siebel server. As a result, you should have a local path similar to `../SWEApp/Public/<lang>/hemi/siebel7.htc`.

**Note:** The hemi folder from any previous version should be deleted from the Siebel server first.

15. Repeat steps 9 through 13 for every language on the Siebel server for which you want help integration.

 To make the original Siebel Help available through help integration:

1. In the IAS Configuration document in the Developer, click the **add new** link in the Sources section.
2. Click the **Original application help** link.
3. From the **Application Help Type** list, choose **Siebel Help**.
4. In the **Caption** field, enter a name for the source. This is used as the tab title or link text.

5. In the Application Instances section, click the **add new** link under Help Integration Additional Tabs or Help Integration Additional Links.
6. From the **Tab 1** list, choose the original application help source for Siebel that you just created.
7. Save the IAS Configuration document and return to step 8 in the previous procedure.

## 2.2.15 Siebel CRM (On Premise High Interactivity and Open UI Applications) with HINT Agent

The following are guidelines for a Siebel Administrator to introduce a new menu item in Siebel Applications for the users to launch the Player in a context-sensitive manner. The recommended method is to ensure that the solution works as desired in a test environment, and then apply the changes to the production environment.

**Important Upgrade Note:** If you have already implemented this feature using version 11.1.0.2 and patch 18104838 of this product, then you must repeat all the steps in this section for the current solution to overwrite the scripts. Also, the `siebel7_ias_agent.html` and `siebel7_ias_agent.js` files should be removed from the Siebel server as they are no longer needed.

Prerequisites to implement and test help integration in Siebel:

1. Siebel Tools must be installed and configured.
2. Siebel Web Client is installed with remote access configured on the developer machine.
3. A URL where the Player content will be deployed. This is needed for the menu item to launch the Player content.
4. To complete the Siebel server customization steps, the content of the `siebel7\agent` directory is needed from the Developer installation folder. This directory is referenced below as `<Siebel scripts directory>`.
5. Before functional testing of the help integration implementation, the Player should be deployed to the web server.



To add the `UPKContentURL` property in the Siebel Web Client:

1. Select **Administration - Application** in the **Site Map**.
2. Select **System Preferences**.
3. Add a new record named **UPKContentURL** and set the value to the Player content URL. Be sure that the URL ends with a slash character.



To add the service initialization in the Siebel Web Client:

1. Select **Administration - Runtime Events** in the **Site Map**.
2. Select the **Action Sets** tab of the Runtime Events administration page.
3. Click **New** to add a new action set and set the name to **UPK-Init**.
4. Scroll down to the action set records and add a new record with the following properties:

Name: **UPK-ServiceInit**  
Action Type: **BusService**

Sequence: **1**

5. Scroll down to the More Info section and set the following fields to the specified values:

Business Service Name: **UPKService**  
Business Service Method: **UPKServiceInit**

6. Click **Menu** and **Save Record** in the More Info section.
7. Select the **Events** tab of the Runtime Events administration page.
8. Click **New** to add a new event record with the following properties:

Sequence: **1**  
Object Type: **Application**  
Event: **WebLogin**  
Action Set: **UPK-Init**

9. Click **Menu** and **Save Record** in the Events section.

The menu item is created using a Siebel server Business Service and should be applied to the Siebel server.

 To add the In-Application Support menu item to the Help menu:

1. Open Siebel Tools and login as a developer.
2. Select menu **View/Options...**
3. Select the **Object Explorer** tab in the Development Tools Options dialog.
4. Ensure **Command** and **Menu** items are selected in the Object Explorer Hierarchy.
5. Click **OK** to save the options.
6. Select the **Project** tree item in the Object Explorer's Types panel.
7. Add a new record to the project list using the **Edit/New Record** menu.
8. Type **UPK** in the Project's **Name** column; ensure the **Locked** column is checked.
9. Select **Business Service** in the Object Explorer panel.
10. Add a new record to business services list using the **Edit/New Record** menu.
11. Type **UPKService** in the Business Services' **Name** column; set the **Project** to **UPK**.
12. Open the **Business Service** tree item in the Object Explorer's Types panel.
13. Select the **Business Service Method** item.
14. Add a new record to the business service methods using the **Edit/New Record** menu.
15. Type **UPKServiceInit** to the Business Service Method's **Name** column.
16. Add a new record to the business service methods using the **Edit/New Record** menu.
17. Type **UPKServiceMethod** to the Business Service Method's **Name** column.

18. Right click on **UPKService** row header in the business services list.
19. Select the **Edit Server Scripts** menu.
20. Select the **File/Import** menu and browse for the <Siebel scripts directory>.
21. Select **UPKService\_ServerScript.js** and click **Open**.
22. Click the **Save** toolbar button.
23. Right click on **UPKService** row header in the business services list.
24. Select the **Edit Browser Scripts** menu.
25. Select the **File/Import** menu and browse for the <Siebel scripts directory>.
26. Select **UPKService\_BrowserScript.js** and click **Open**.
27. Click the **Save** toolbar button.
28. Select **File/New Object** menu.
29. Select **Command** in the New Object Wizards dialog.
30. Select **Command** in the New Object Wizards dialog.
31. Select **Command** in the New Object Wizards dialog.
32. Select **Command** in the New Object Wizards dialog.
33. Select the **Business Service** option.
34. Select **UPKService** in the business services list.
35. Enter **UPKServiceMethod** in the Method to be invoked field; click **Next**.
36. Unselect **Execute this command in a new window** option; click **Next**.
37. Click **Finish**.
38. Select the **Menu** tree item in the Object Explorer's Types panel.
39. Select the **Generic WEB** Menu project row in the Menus list.
40. Ensure **Object Locked** column is checked for the selected row.
41. Open the **Menu** tree item in the Object Explorer's Types panel.
42. Select the **Menu Item** item.
43. Add a new record to the menu items list using the **Edit/New Record** menu.
44. Type **Help - UPK Sep** in the **Name** column; set the Position to **7.199**.
45. Add a new record to the menu items list using the **Edit/New Record** menu.
46. Type **Help - UPK** in the **Name** column; set Caption - String Override to any name at your choice to displayed, for example: **In-Application Support, Help** or **Learn**; set Position to **7.200**; set Command to **UPKServiceMethod**.
47. Navigate to the next record to save the changes.

48. Test and verify the changes in the local environment.
49. Check in the menu, UPK and all other locked projects to the server.

After the previous steps are applied a new menu item called In-Application Support should appear in the Siebel **Help** menu. You can test whether the menu item is functional by selecting it and verifying the URL that opens. If the Player content is already deployed to the location specified by UPKContentURL, then you can also check that the applicable topics are shown.

### Language Segmentation

If you need a solution for multiple languages, then compile and deploy the server changes for each language and configure content segmentation in the main Player to which the UPKContentURL refers. See *Configure Content* for more information.

### Troubleshooting

The following message can appear when the user is logged into Siebel Web Client:

- **Unable to create the Business Service 'UPKService'(SBL-DAT-00227)**  
The solution must be compiled and deployed to the current Seibel language.

The following message can appear when a user activates the new menu item in the Siebel application:

- **UPKService: UPKContentURL is not available!**  
The message appears when the UPKContentURL property is missing from System Preferences.

## 2.3 Install SmartHelp

You can deploy SmartHelp using either a manual installer with a user interface and options that the user can select and install, or an unattended installer with no interface based on a script that already contains the necessary options to be installed.

In both installation modes, you must have administrator rights to complete the install process.

### 2.3.1 Manual Installation with the Installer

To use the SmartHelp installer, open a command prompt window and navigate to the location of the smarhelpinstaller.exe file. You are then prompted to choose the language for the Installer, and the Welcome screen appears. During installation, you proceed through these screens in the Install Wizard.

1. **Choose Destination Location:** You can accept the default target location, or click **Change** to specify a different one. The Destination Location is the target directory where the SmartHelp files will be installed.
2. **Ready to Install:** The Installation Wizard is ready to install the software. Click **Back** to review or modify any settings.
3. **Setup Status:** This screen appears while the plug-ins are being installed and configurations are made to the local workstation to enable SmartHelp.
4. **InstallShield Wizard Complete:** SmartHelp is installed and can be run through any supported browser.

### 2.3.2 Unattended Installation

You can use Push technology to distribute executable files for the setup to user desktops. You record response files which contain the pre-determined default settings, and then you can run

the executable silently. If you deploy executable files in this manner, no interaction is necessary on the part of the user. The administrator can control the installation.

### 2.3.2.1 Record a Response File

To create a response file, you use the `/r` parameter to run the setup executable in record mode. This generates a response file (`.iss`) that contains the settings you chose while recording. These become the default settings. Recording the installation requires the installer to run with the full user interface.

The `setup.iss` file is stored automatically in the Windows folder. You can use the `/f1` option to specify a different location in which to create the response file. If the path names contain spaces, you must use quotes. The path names should also be absolute, as relative paths may have unexpected results.

Example: "`<location of the setup file>\smarthelpinstaller.exe /r /f1"<location of the response file>\smarthelpsetup.iss`"

Sample: "`x:\my folder\smarthelpinstaller.exe /r /f1"x:\smarthelpsetup.iss`"

SmartHelp installation can be performed multiple times, and the configuration can be modified for later installations. The first time the installation is recorded for an administrative push installation, all the configuration options are stored in a configuration file as noted in the command-line parameters. This configuration file can later be edited for subsequent administrative push installations and can also be used as the base configuration when recording a new configuration for an administrative push installation.

 To run the executable in record mode for the first time:

1. Open a Run dialog box and navigate to the location of the **smarthelpinstaller.exe** file.
2. Select the **smarthelpinstaller.exe** file and click **Open**.
3. In the **Open** field, click at the end of the command line.
4. Enter `/r /f1<location of the response file>\smarthelpsetup.iss` and click **OK**.
5. Select the language for the installer and click **OK**.
6. Click **Next** on the Welcome screen.
7. Select a destination location for the installation. This location is used for all instances of SmartHelp when installed using the push installation. Click **Next**.
8. Enter the URLs for the SmartHelp subscription pages. These URLs should point to the registration location (`cdd.html`) of the SmartHelp source Players.

Example: `https://content.example.com/subscription/cdd.html`

9. Click **Add** to add the source to the list. Repeat as necessary to add sources. Select the Source URL and click **Remove** to remove it from the list.
10. Select the **Restrict subscriptions to specified URLs only option** to prevent the users from adding new subscriptions. Click **Next**.
11. On the Configuration Settings screen, select the user language and the hot keys, and click **Next**.

**Note:** At minimum, you must select a function key for a hot key. Each browser can

have its own hot key combination.

12. On the Ready to Install screen, click **Install**.
13. On the InstallShield Wizard Complete screen, click **Finish**.

### 2.3.2.2 Reconfigure a Response File


If you have already recorded a response file, you can edit it for subsequent installations or use it as a base for a new configuration.

The command-line switch for using an existing configuration is:

```
/use_config:<previousparameterfile>
```

where <previousparameterfile> is the location of the previously recorded configuration.

This cannot be the same name as the filename used for recording the new installation (the /f1 parameter). The installer makes a copy of the original configuration file with this name and stores the new settings in a file with the original name.

 To reconfigure a response file:

1. Open a Run window and navigate to the location of the **smarthelpinstaller.exe** file.
2. Select the **smarthelpinstaller.exe** file and click **Open**.
3. In the **Open** field, click at the end of the command line.
4. Enter **/r /f1<location of the response file>\smarthelpsetup.iss /use\_config:<previousparameterfile>** and click **OK**.
5. Select the language for the installer and click **OK**.
6. Click **Next** on the Welcome screen.
7. Select a destination location for the installation. This location is pre-populated from the previous response file. Click **Next**.
8. Add or remove the URLs for the SmartHelp subscription pages. These URLs should point to the registration location (cdd.html) of the SmartHelp source Players.  
Example: `https://server/path/cdd.html`
9. Click **Add** to add the source to the list. Repeat as necessary to add sources. Select the Source URL and click **Remove** to remove it from the list.
10. Select the **Restrict subscriptions to specified URLs only option** to prevent the users from adding new subscriptions. Click **Next**.
11. On the Configuration Settings screen, select the user language and the hot keys, and click **Next**.  
**Note:** At minimum, you must select a function key for a hot key. Each browser can have its own hot key combination.
12. On the Ready to Install screen, click **Install**.
13. On the InstallShield Wizard Complete screen, click **Finish**. The new installation options are recorded in the specified file.

### 2.3.2.3 Execute an Unattended Installation

Once you have recorded a parameter file, you can use the /s parameter to run the setup silently. By default, the installation process looks for the response file (.iss) in the same directory as the setup.exe. You use the /f1 parameter to specify a different location of the .iss file. The response file (.iss) must be either be pushed out with the setup.exe file or reside in a location that is accessible to all computers and uses the same drive mapping as is stored in the response file.

To run an unattended installation, you must use the standard InstallShield silent install parameters in the command line.

/s - runs the installer in silent mode

/f1[scriptfile] - The name of the response file created when running the installer in record mode, including the path.

/f2[logfile] - The name of the installation log file created when running the installer in silent mode, including the path. This parameter is optional; if it is not used, the log file is created in the same folder as the response file.

Example: "<location of the setup file>\smarthelpsetup.exe" /s /f1"<location of the response file>\smarthelpsetup.iss"

Sample: "x:\my folder\smarthelpsetup.exe" /s /f1"x:\smarthelpsetup.iss"

While the setup file is running, there is no indication in the task bar. To verify that the setup process is still running, open Task Manager and view the Processes tab. Setup.exe should appear in the list. When the smarthelpinstaller.exe disappears from the task list, you can verify that the installation was successful by opening the setup.log file and locating the [ResponseResult] section. If the value of the ResultCode is 0, the installation was successful.

 To execute an unattended installation:

1. Open a Run window and navigate to the location of the **smarthelpinstaller.exe** file.
2. Select the **smarthelpinstaller.exe** file and click **Open**.
3. In the **Open** field, click at the end of the command line.
4. Enter **/s /f1<location of the response file>\smarthelpsetup.iss /f2<location of the log file>** and click **OK**.

### 2.3.3 SmartHelp in Knowledge Center


If you are using Knowledge Center server as the location from which users install SmartHelp, you should be aware that when the Knowledge Center server is upgraded, the latest version of the SmartHelp Installer is installed on the server. If you do not want to use the new version of SmartHelp, you can do two things:

- Use the SmartHelp Installation Location setting on the Server Properties page in Knowledge Center. The Custom URL option allows you to specify a URL to a different location. Before you upgrade the Knowledge Center server, you can copy the SmartHelp install package from the location indicated in the Knowledge Center URL field and copy it to the custom location. Users are then prompted to install the older SmartHelp version from the custom location and not the upgraded SmartHelp in the location on the Knowledge Center server.
- If you are already using the Knowledge Center Installation Location, copy the SmartHelp Installation files from the location and paste them in another location before you upgrade Knowledge Center. After you upgrade Knowledge Center, copy the



new files from the location and store them in another location, then copy the older version of the SmartHelp files back on to the server.

If you deploy SmartHelp content through the Knowledge Center server, and your Knowledge Center server runs behind a front-end server such as a web-server, SSL off-loader, load balancer, or VPN server, you must configure the server's external URL so that Knowledge Center can resolve URLs properly in the SmartHelp subscription pages.

 To configure the Knowledge Center external URL:

1. Log in to Knowledge Center with an administrator account.
2. Click the **Manager** link.
3. Point to **More** and choose **Server**.
4. Check if the value in the **Server URL** field is appropriate for your current installation. Change the value if necessary. In most cases, this value was set properly during Knowledge Center installation.

### 2.3.4 Uninstall SmartHelp

SmartHelp can be disabled in the selected browser using the appropriate Tools menu option for disabling the browser add-on.

If you want to remove SmartHelp entirely, you can locate the SmartHelp entry in the Programs and Features section of the Control Panel and then click Uninstall. You will need administrator rights to perform the uninstall process.

### 2.3.5 Troubleshooting

#### Internet Explorer

- When you install SmartHelp and then restart Internet Explorer, a message about the SmartHelp add-on appears. Select **Enable** and then restart Internet Explorer again to enable SmartHelp.
- In most cases, after you restart the browser the new toolbar button appears automatically. However, if the user has customized the Internet Explorer toolbar, the new button may not appear. In this case, the toolbar button is added to the choices in the Customize Toolbar dialog box, and it appears if the toolbar is reset.
- Depending on the version of Internet Explorer you are using, the entire toolbar may not display. In this case the SmartHelp button is located in the dropdown list area for more buttons.

#### Firefox

- In most cases, after you restart the browser the new toolbar button appears automatically. However, in some cases the SmartHelp toolbar button must be explicitly added to the toolbar using the toolbar's Customize option.
- SmartHelp can become temporarily disabled if Firefox is just about to upgrade to a newer browser version. If SmartHelp is not automatically re-enabled during the next two browser restarts, you must re-enable SmartHelp manually from the Tools menu.

## 2.4 Administer SmartHelp Groups

If you deploy SmartHelp content through the Knowledge Center server, you can create SmartHelp groups. Using groups can make subscriptions easier. If a user subscribes to a

group, they are automatically subscribed to all content in the group. If any content is added to the group, they are automatically subscribed to that, as well.

You create and administer SmartHelp groups using knowledge paths in Knowledge Center. Knowledge paths are used to organize titles into curricula in courses for the users to learn about the application. If the titles are enabled for SmartHelp, the knowledge paths become SmartHelp groups as well. By enrolling a user in a knowledge path, they are enrolled in the SmartHelp group. For more information about knowledge paths in general, see *Manage Knowledge Paths* in the User and Content Management guide.

**Note:** Knowledge Paths are only available in the Professional Edition of Knowledge Center.


To manage SmartHelp groups, you must have a user account for Knowledge Center with Manager rights to allow you to launch the Manager application. The procedures in this section assume that you have logged in to Knowledge Center and opened the Manager. For more information, see *Log In* in the Knowledge Center guide. Once you have logged in, click the Manager link in the Navigation pane on the left to open Manager.

### 2.4.1 Enable Titles for SmartHelp

Titles in Knowledge Center must be enabled for SmartHelp to use them in groups. Titles are enabled for SmartHelp by default; this option appears on the Properties page for the title. You can control this in two ways. You can edit the setting on the Properties page for the title, or, in the Developer, you can enable or disable the Allow SmartHelp option for the title in the IAS Configuration document. When the document is published to Knowledge Center, this setting is honored.

If the title is enabled for SmartHelp, a URL appears in the Public CDD URL field. If desired, you can send this URL to a user to allow them to subscribe to the title directly without using groups.

 To enable or disable a title for SmartHelp:

1. In the Manager, display the Title Management page.
2. Click  in the **Edit** column for the title you want to edit.
3. Scroll to the bottom of the Title Properties page, if necessary,
4. Select or deselect the **Enable SmartHelp** option.
5. Click **Save**.

### 2.4.2 Create a Group

A knowledge path is a SmartHelp group, and all of the titles in the knowledge path are part of the group. In a knowledge path, titles are associated with activities. To put multiple titles in a group, you create multiple activities and associate a title with each activity.

In most cases, you should consider creating specific knowledge paths to use for SmartHelp groups instead of re-using ones set up for user learning. If you set up one for user learning, it may not result in the SmartHelp group that you want, and, if you want to change the titles in the group, it may have adverse effects on user learning. If you create a knowledge path specifically to be a SmartHelp group, it is a good idea to make sure that the User Can Self Enroll option is deselected so that a user cannot accidentally enroll in it. This option is deselected by default.

When you enable a knowledge path for SmartHelp, the Public CDD URL field is automatically populated with a URL. This URL can be sent to users to allow them to enroll in the group from another location.

### Create a SmartHelp Group using an Organizational Knowledge Path

The simplest way to create a SmartHelp Group is to create an organizational knowledge path. This type of path contains multiple activities all at the same level; all activities are at the same level. The name of the knowledge path is used as the name of the SmartHelp group.

Example, based on the procedure below:



Knowledge Path Name

Activity: Title A

Activity: Title B

Activity: Title C

 To create a SmartHelp group using an organizational knowledge path:

1. In the Manager, display the Knowledge Path Management page.
2. Click **Create path**.
3. Enter a name for the path. This is used as the name of the SmartHelp group.
4. Click the **Enable SmartHelp** option.
5. Click **Save**.
6. Click the **Activities** link.
7. Click  in the **Add** column.
8. Click **Browse** next to the Title Properties field.
9. Expand the hierarchy of items as necessary.
10. Select the desired item.
11. Click **Select**.
12. Click **Save** to save the activity.
13. Click **Back to Activities**.
14. Click  in the **Add** column on the top line next to the path name.
15. Repeat steps 8 through 13 for each title you want to add to the group.
16. Click the **Properties** link to return to the Path Properties page.
17. Click the **Back to List** link to return to the Knowledge Path Management page.

### Create a SmartHelp Group using a Curriculum Knowledge Path

A curriculum knowledge path includes multiple activities at different levels. In this type of knowledge path, you can essentially create a group with sub-groups. While a user can only subscribe to the group itself, by creating sub-groups you can organize a great number of titles into sub-groups for easier maintenance.



Example, based on the procedure below:

**Knowledge Path Name**

Activity: Title A  
    Activity: Title A1  
    Activity: Title A2  
Activity: Title B  
    Activity: Title B1  
        Activity: Title B1-1  
        Activity: Title B1-2  
    Activity: Title B2

To the users, they simply subscribe to the group (knowledge path) and are subscribed to all of the titles. For maintenance, titles can be easier to locate if they are arranged in a hierarchy.

 To create a SmartHelp group using a curriculum knowledge path:

1. In the Manager, display the Knowledge Path Management page.
2. Click **Create path**.
3. Enter a name for the path. This is used as the name of the SmartHelp group.
4. Click the **Enable SmartHelp** option.
5. Click **Save**.
6. Click the **Activities** link.
7. Click  in the **Add** column.
8. Click **Browse** next to the Title Properties field.
9. Expand the hierarchy of items as necessary.
10. Select the desired item.
11. Click **Select**.
12. Click **Save** to save the activity.
13. Click **Back to Activities**.
14. Click  in the **Add** column next to the activity to which you want to add a sub-activity at a lower level.
15. Repeat steps 8 through 13 as necessary to add titles and create the hierarchy.
16. Click the **Properties** link to return to the Path Properties page.
17. Click the **Back to List** link to return to the Knowledge Path Management page.

**SmartHelp Hierarchy**


After you have created a SmartHelp group, you can view the SmartHelp hierarchy. The hierarchy may resolve to something that looks a little different than the knowledge path. This happens because a title cannot be a group, which is part of the organizational structure, as well as a title. In the hierarchy, therefore, you may see the name of the title duplicated as the group name. For example, the first example structure, given above for the organizational knowledge path, displays this hierarchy:

Group Name  
 Title A  
 Title B  
 Title C

However, the second example structure, given above for the curriculum knowledge path, displays this hierarchy:

Group Name  
 Title A (Group Name)  
     Title A (title name)  
     Title A1  
     Title A2  
 Title B (Group Name)  
     Title B (title name)  
     Title B1 (Group Name)  
         Title B1 (title name)  
         Title B1-1  
         Title B1-2  
 Title B2

 To view the SmartHelp hierarchy:


1. In the Manager, display the Knowledge Path Management page.
2. Click  next to the group for which you want to view the hierarchy.
3. Click the **Show SmartHelp Hierarchy** link.


### 2.4.3 Enroll Users in a Group

When you enroll users in a SmartHelp group, the titles then become available for subscription the next time the user opens SmartHelp. The user is notified that there are new sources, and they can choose to subscribe to the entire group or individual titles on the SmartHelp Subscription Home page.

The users must have accounts in Knowledge Center. For more information about users and creating accounts, see *Manage Users* in the User and Content Management guide. You can also create user groups in Knowledge center to allow you to enroll multiple users quickly and easily in a SmartHelp group. For more information about user groups, see *Manage User Groups* in the User and Content Management guide.

Before performing this procedure, you must have created user accounts in Knowledge Center.

 To enroll users in a SmartHelp Group:

1. In the Manager, display the Knowledge Paths Management page.
2. Click  next to the knowledge path (group name) to which you want to enroll users.
3. Click the **User Enrollment** link.
4. In the **Admin Enrolled** column, select the checkboxes next to the users you want to enroll in the group.

**Note:** If you have created user groups in Knowledge Center, you can click the User Group Enrollment link in step 3 and select the user groups to enroll in the **Enrolled** column.

